

**This work instruction was last updated: 10<sup>th</sup> May 2012**

## **Fees/Casual New Starter Process**

This Work Instruction describes the Temp Bank New Starter Process.

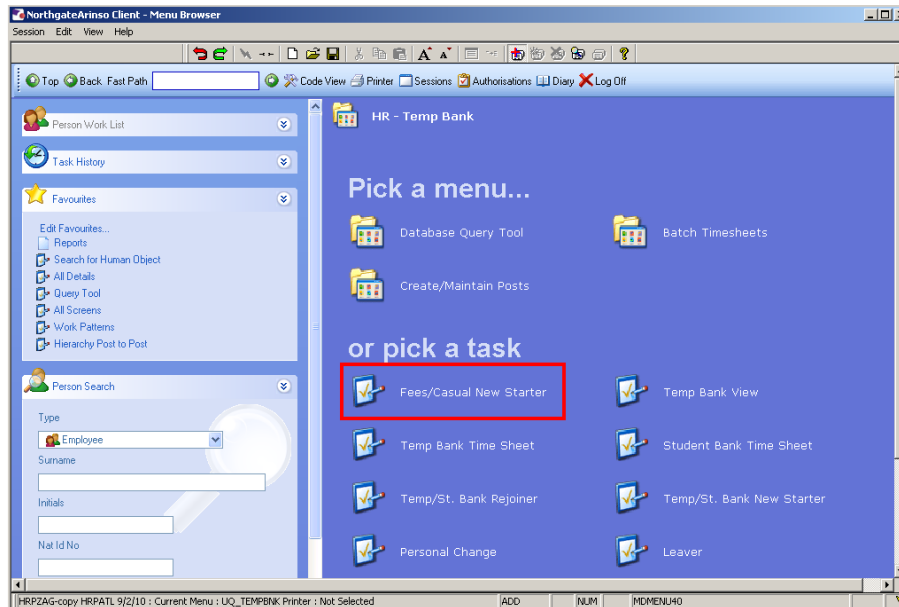
-  If the person is a past employee of the University you will need to enter them on the system using the **Rejoiner** task.

With all of the data entry screens it is important to press the **ENTER** key to move between fields and until all of the fields have been accessed, whether you need to enter data into them or not.

- |   |  |
|---|--|
| 1 | Setting up a New Starter               |
| 2 | Personal Details data entry screen     |
| 3 | Equal Opportunities data entry screen  |
| 4 | Employee Work Permit data entry screen |
| 5 | Employment Detail data entry screen    |
| 6 | Basic Pay Details data entry screen    |
| 7 | Current Post Holding data entry screen |
| 8 | Unit of Assessment                     |
| 9 | Standard letters                       |

# 1 Setting up a New Starter

## 1.1 ResourceLink HR- Temp Bank select Fees/Casual New Starter

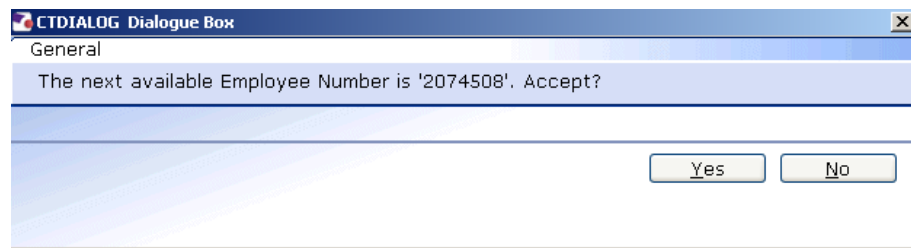


## 1.2 The Employee Selection Screen will be displayed.

| Surname | Inits | Title | Emp Number | National ID Number | Start Date | For |
|---------|-------|-------|------------|--------------------|------------|-----|
|         |       |       |            |                    |            |     |
|         |       |       |            |                    |            |     |
|         |       |       |            |                    |            |     |
|         |       |       |            |                    |            |     |
|         |       |       |            |                    |            |     |
|         |       |       |            |                    |            |     |
|         |       |       |            |                    |            |     |
|         |       |       |            |                    |            |     |
|         |       |       |            |                    |            |     |
|         |       |       |            |                    |            |     |

## 1.3 To add a new starters select ADD

## 1.4 A New Employee Number will be generated.



Click on **Yes** to enter the data entry screens.

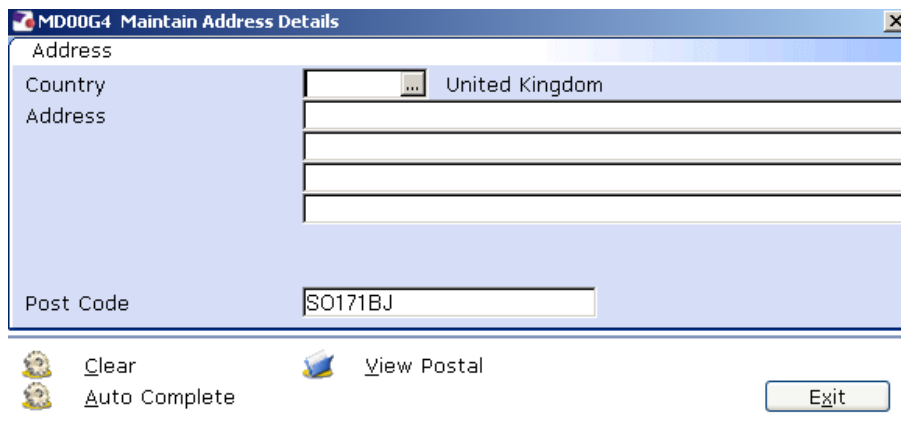
## 2 Personal Details data entry screen

2.1 Enter all known details in the relevant fields. If you do not know the National Insurance Number a temporary one will be generated by ResourceLink.

☛ Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.

2.2 Click on **Home Address** to enter the address details.

2.3 Enter the **Post Code** and press **ENTER**.



MD00G4 Maintain Address Details

Address

Country

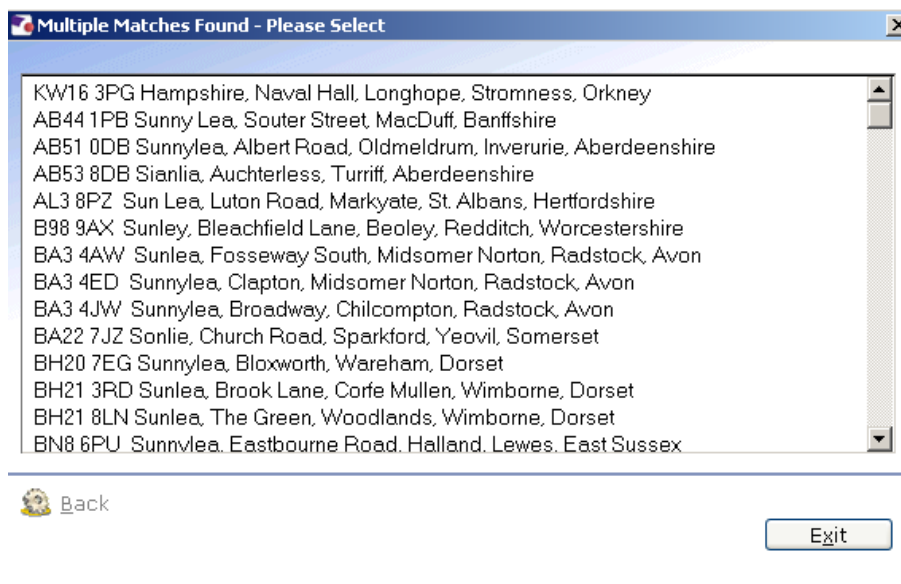
Address

Post Code

Clear View Postal

Auto Complete

2.4 Click on **Auto Complete**.



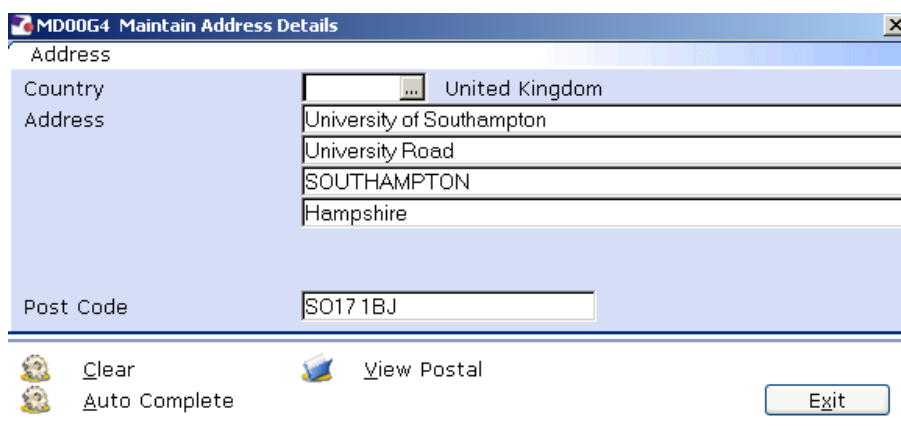
Multiple Matches Found - Please Select

KW16 3PG Hampshire, Naval Hall, Longhope, Stromness, Orkney  
 AB44 1PB Sunny Lea, Souter Street, MacDuff, Banffshire  
 AB51 0DB Sunnylea, Albert Road, Oldmeldrum, Inverurie, Aberdeenshire  
 AB53 8DB Sianlia, Auchterless, Turrit, Aberdeenshire  
 AL3 8PZ Sun Lea, Luton Road, Markyate, St. Albans, Hertfordshire  
 B98 9AX Sunley, Bleachfield Lane, Beoley, Redditch, Worcestershire  
 BA3 4AW Sunlea, Fosseyway South, Midsomer Norton, Radstock, Avon  
 BA3 4ED Sunnylea, Clapton, Midsomer Norton, Radstock, Avon  
 BA3 4JW Sunnylea, Broadway, Chilcompton, Radstock, Avon  
 BA22 7JZ Sonlie, Church Road, Sparkford, Yeovil, Somerset  
 BH20 7EG Sunnylea, Bloxworth, Wareham, Dorset  
 BH21 3RD Sunlea, Brook Lane, Corfe Mullen, Wimborne, Dorset  
 BH21 8LN Sunlea, The Green, Woodlands, Wimborne, Dorset  
 BN8 6PU Sunnylea, Eastbourne Road, Halland, Lewes, East Sussex

Back

2.5 Click on the correct address if given options

2.6 Click on **Exit**.



MD00G4 Maintain Address Details

Address

Country

Address

Post Code

Clear View Postal

Auto Complete

- ① Click on **View Postal** to see how the address will be displayed on printed documentation.

2.7 Click **Exit**.

2.8 Click on **Contact Tel** to enter the contact telephone details.

The screenshot shows a dialog box titled "MD55G3A Maintain Contact Numbers". It has a tab labeled "Main Contact Numbers". Below the tab, there are four input fields: "Home Phone No", "Work Phone No" (containing "02380 593824"), "Mobile Phone No", and "Fax No". Below these fields is a section titled "Additional Contact Numbers" with two more input fields: "Contact1 Phone No" and "Contact2 Phone No". At the bottom right of the dialog box is an "Exit" button.

2.9 Enter all known details and click on **Exit**.

2.10 Click on **Email Address** to enter the email address details.

The screenshot shows a dialog box titled "MD030G7 Maintain Email Address". It has a tab labeled "General". Below the tab, there are two input fields: "Email" (containing "bmtly07@soton.ac.uk") and "Desc" (containing "LUCY LASTIC"). To the right of these fields is a "Preferred Method" checkbox, which is checked. At the bottom right of the dialog box is an "Exit" button.

2.11 Enter the email address, tick the Preferred Method options and click on **Exit**.

2.12 Click on **Marital Status** to enter the relevant information.

2.13 Click on **Add** to enter data.

| Seq | Start Date | Marital Status | Verified? |
|-----|------------|----------------|-----------|
|     |            |                |           |
|     |            |                |           |
|     |            |                |           |
|     |            |                |           |
|     |            |                |           |
|     |            |                |           |
|     |            |                |           |
|     |            |                |           |
|     |            |                |           |
|     |            |                |           |

Add Change Delete

Exit

2.14 Enter the **Start Date** of the status if known - if not, press **ENTER** to pass the field.

2.15 Click on the drop down and select the **Marital Status**.

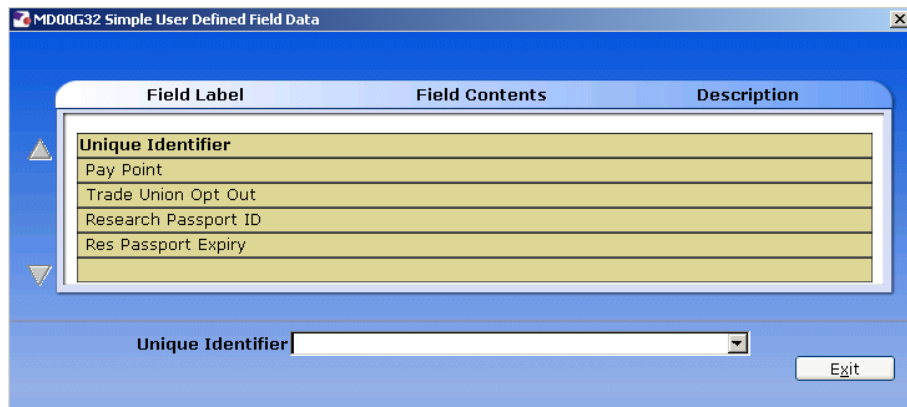
| Seq | Start Date | Marital Status | Verified? |
|-----|------------|----------------|-----------|
| 001 |            |                |           |

| Code | Desc     | Long Description    |
|------|----------|---------------------|
| CP   | Civil    | Civil Partnership   |
| D    | Divorced | Divorced            |
| LWP  | LWP      | Living With Partner |
| M    | Married  | Married             |
| S    | Single   | Single              |
| UNK  | Unknown  | Unknown             |
| W    | Widowed  | Widowed             |

2.16 If the marital status has been verified, enter a **Y** in the **Verified** field.

2.17 Click **Exit**.

2.18 Click on **User Fields** to enter the **Unique Identifier** (not used at present) and the **Pay Point**.



- 2.19 Click on **Pay Point** and on the drop down arrow in the field. The following dialog box will appear.



- 2.20 Press the **ENTER** key to display the list of available **Pay Points**.





MD37G4A Narrative Table Search

Search  
Narr Code

| Seq | Code | Desc | Long Description                 |
|-----|------|------|----------------------------------|
| 001 | 00   | 00   | Post or Collect                  |
| 002 | 02   | 02   | Maternity                        |
| 003 | 03   | 03   | Living Abroad                    |
| 004 | 03C  | 03C  | Living Abroad + Cheque           |
| 005 | 04   | 04   | Place in Personal File           |
| 006 | 05   | 05   | Send out every December          |
| 007 | 06   | 06   | Send out every June and December |
| 008 | 07   | 07   | Leaver - Send with P45           |
| 009 | 09   | 09   | Pensionable Fee Payment          |

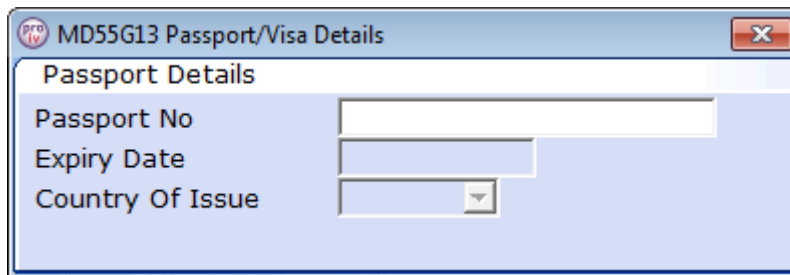
Add Select Delete

Exit

2.21 Click on the required **Pay Point** and then click on **Exit**.

2.22 Click on Passport/Visa

- ☛ To comply with RTI (Right To Information) and to assist the UK Border Agency we need to the staff members Passports details entered and also a legible copy put onto DocStore.



MD55G13 Passport/Visa Details

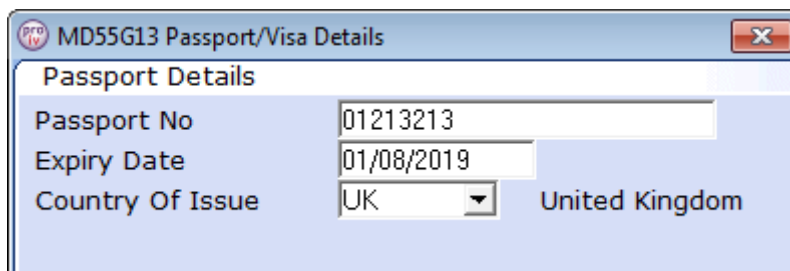
Passport Details

Passport No

Expiry Date

Country Of Issue

2.23 Complete the 3 fields.



MD55G13 Passport/Visa Details

Passport Details

Passport No 01213213

Expiry Date 01/08/2019

Country Of Issue UK United Kingdom

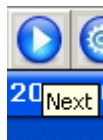
- 2.24 Once the details have been added, click on Exit (at the bottom).
- 2.25 Click onto User Fields
- 2.26 If you have added a certified copy of the staff members password to DocStore, then enter **Y** into the “**Cert. Passport**”, otherwise leave this blank.

| Field Label           | Field Contents | Description |
|-----------------------|----------------|-------------|
| Unique Identifier     | A0000000113834 |             |
| Pay Point             |                |             |
| Trade Union Opt Out   |                |             |
| Res Passport Issued   |                |             |
| <b>Cert. Passport</b> | Y              | Yes         |

Cert. Passport **Y**  
Yes

Exit

- 2.27 Press Enter for it to accept the Y and then click on Exit.



- 2.28 Click on  to move to the next data entry screen.



| Code  | Desc       | Long Description    |
|-------|------------|---------------------|
| IR001 | SENSORY    | Sensory Impairment  |
| IR002 | MOBILITY   | Mobility Impairment |
| IR003 | MENTAL HEA | Mental Health       |
| IR004 | MEDICAL    | Medical Condition   |
| IR005 | LEARNING   | Learning Difficulty |
| IR006 | SPEECH     | Speech Impairment   |

3.4 Click on the drop down arrow in the **Code** field to display a list of incapacity reasons.

3.5 Select the appropriate incapacity reason.


The Description will appear as you **ENTER** through the fields.

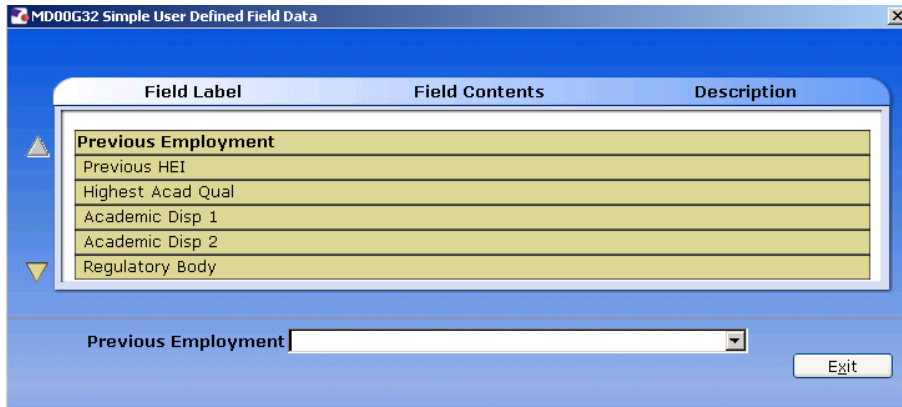
3.6 If the disability has been registered type **Y** in the **Reg** field.

☛ Only window into the **Notes** field if you need to record conditions that school managers would need to be aware of. i.e. Diabetes.

3.7 Click **Exit**.

3.8 When you have completed the entry click on **Exit**.

3.9 Click on  **User Fields** to complete **HESA information**.



The screenshot shows a window titled "MD00G32 Simple User Defined Field Data". It contains a table with three columns: "Field Label", "Field Contents", and "Description". The table has five rows, all under the "Previous Employment" label. The rows are: "Previous HEI", "Highest Acad Qual", "Academic Disp 1", "Academic Disp 2", and "Regulatory Body". Below the table, there is a dropdown menu labeled "Previous Employment" and an "Exit" button.

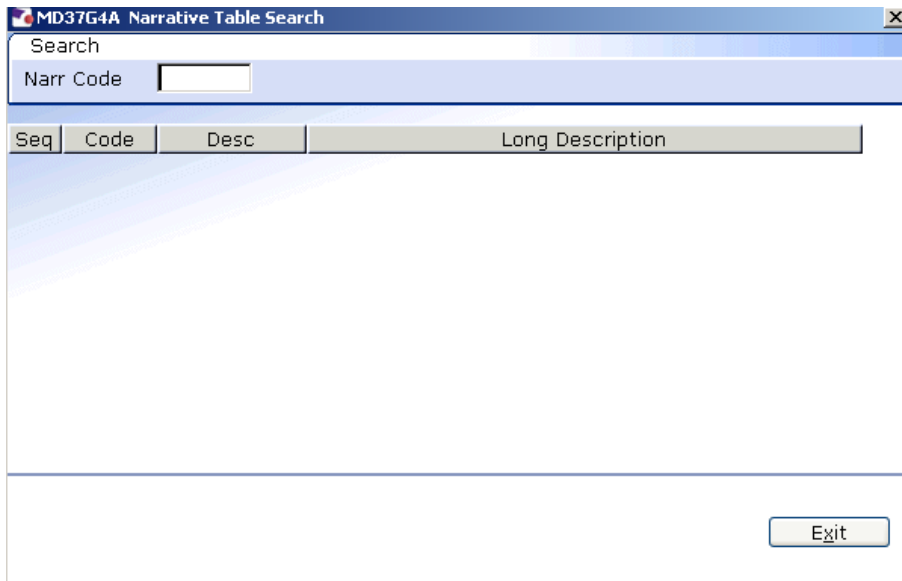
| Field Label         | Field Contents | Description |
|---------------------|----------------|-------------|
| Previous Employment |                |             |
| Previous HEI        |                |             |
| Highest Acad Qual   |                |             |
| Academic Disp 1     |                |             |
| Academic Disp 2     |                |             |
| Regulatory Body     |                |             |

Previous Employment [dropdown]

Exit

3.10 In **Date 1<sup>st</sup> App CurrHEI** – enter the date that the starter was first employed at the University of Southampton.

3.11 Click on **Previous Employment** and click on the drop down.



The screenshot shows a window titled "MD37G4A Narrative Table Search". It has a "Search" section with a "Narr Code" input field. Below this is a table with four columns: "Seq", "Code", "Desc", and "Long Description". The table is currently empty. At the bottom right, there is an "Exit" button.

| Seq | Code | Desc | Long Description |
|-----|------|------|------------------|
|-----|------|------|------------------|

Exit

3.12 Press **Enter**.

**MD37G4A Narrative Table Search**

Search

Narr Code

| Seq | Code | Desc       | Long Description                        |
|-----|------|------------|---|
| 001 | 01   | Another HE | Another HEI in UK                       |
| 002 | 02   | HEIOversea | HEI in an overseas country              |
| 003 | 03   | Other Ed   | Other Education Institution in UK       |
| 004 | 04   | Oth ED     | Other Education Institution in Overseas |
| 005 | 05   | RsInstit   | Research Institution in the UK          |
| 006 | 06   | Res Ins    | Research Institution Overseas           |
| 007 | 07   | Student UK | Student UK                              |
| 008 | 08   | St Oversea | Student in Overseas Country             |
| 009 | 09   | NHS/GEN    | NHS/General medical or gen dental       |

Add Select Delete

Exit

- 3.13 Scroll down the list and click on the previous employment of the new starter.
- 3.14 Click on the drop down in the **Previous HEI** field if the new starter has previously worked at another higher education institute.

**MD37G4A Narrative Table Search**

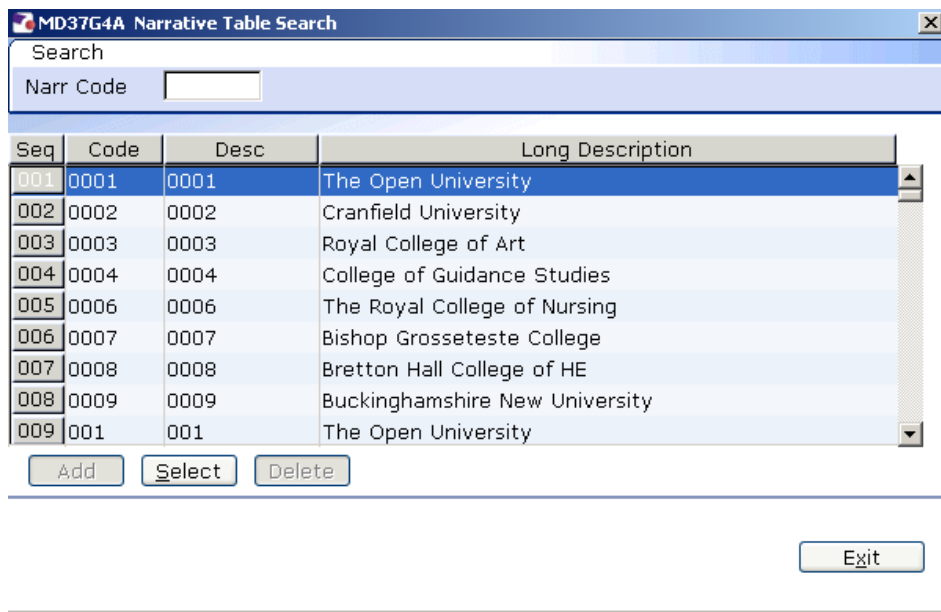
Search

Narr Code

| Seq | Code | Desc | Long Description |
|-----|------|------|------------------|
|-----|------|------|------------------|

Exit

- 3.15 Press **Enter**.



| Seq | Code | Desc | Long Description               |
|-----|------|------|--------------------------------|
| 001 | 0001 | 0001 | The Open University            |
| 002 | 0002 | 0002 | Cranfield University           |
| 003 | 0003 | 0003 | Royal College of Art           |
| 004 | 0004 | 0004 | College of Guidance Studies    |
| 005 | 0006 | 0006 | The Royal College of Nursing   |
| 006 | 0007 | 0007 | Bishop Grosseteste College     |
| 007 | 0008 | 0008 | Bretton Hall College of HE     |
| 008 | 0009 | 0009 | Buckinghamshire New University |
| 009 | 001  | 001  | The Open University            |

3.16 Scroll down the list and click on the new starters previous HEI.

3.17 Click on the drop down of the **Highest Acad Qual** field.



| Seq | Code | Desc | Long Description |
|-----|------|------|------------------|
|-----|------|------|------------------|

3.18 Press **Enter**.

**MD37G4A Narrative Table Search** [X]

Search

Narr Code

| Seq | Code | Desc        | Long Description                         |
|-----|------|-------------|--|
| 001 | 01   | Doctorate   | Doctorate                                |
| 002 | 02   | Oth HghDeg  | Other Higher Degree                      |
| 003 | 03   | PGCE        | PGCE                                     |
| 004 | 09   | Oth PostGr  | Other Postgraduate Qualification         |
| 005 | 11   | FirstDegree | First Degree                             |
| 006 | 12   | FrstDegQT   | First Degree with Qualified Teacher Stat |
| 007 | 19   | Oth Qual    | Other Qualifications at First Degree Lev |
| 008 | 21   | Dipof HE    | Diploma of HE                            |
| 009 | 22   | HND/HNC     | HND/HNC                                  |

Add Select Delete

Exit

3.19 Scroll down the list and click on the Highest Academic Qualification that the new starter holds.

3.20 Click on the drop down of the **Academic Disp 1** field.

**MD37G4A Narrative Table Search** [X]

Search

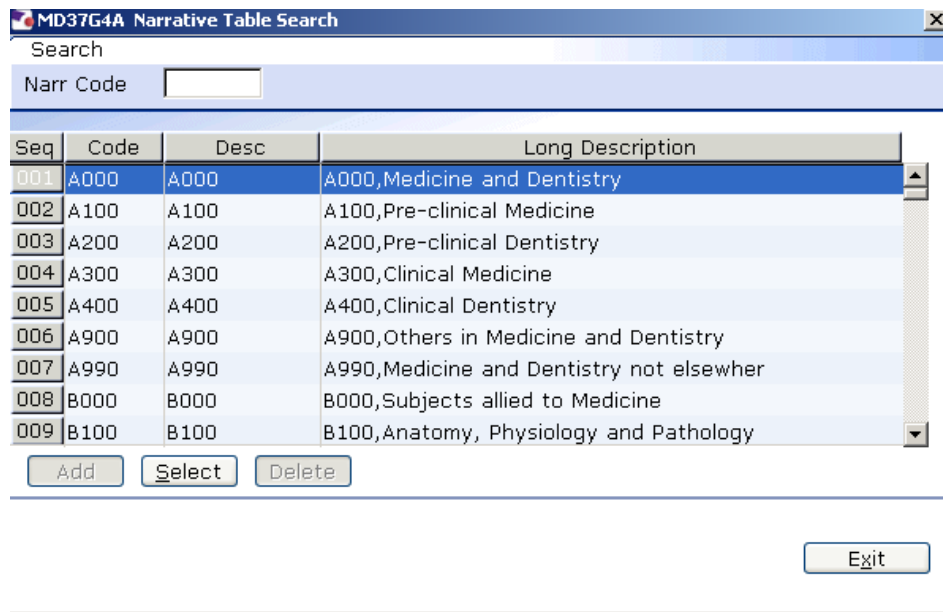
Narr Code

| Seq | Code | Desc | Long Description |
|-----|------|------|------------------|
|-----|------|------|------------------|

Exit

3.21 Press **Enter**.





MD37G4A Narrative Table Search

Search

Narr Code

| Seq | Code | Desc | Long Description                          |
|-----|------|------|---|
| 001 | A000 | A000 | A000,Medicine and Dentistry               |
| 002 | A100 | A100 | A100,Pre-clinical Medicine                |
| 003 | A200 | A200 | A200,Pre-clinical Dentistry               |
| 004 | A300 | A300 | A300,Clinical Medicine                    |
| 005 | A400 | A400 | A400,Clinical Dentistry                   |
| 006 | A900 | A900 | A900,Others in Medicine and Dentistry     |
| 007 | A990 | A990 | A990,Medicine and Dentistry not elsewhere |
| 008 | B000 | B000 | B000,Subjects allied to Medicine          |
| 009 | B100 | B100 | B100,Anatomy, Physiology and Pathology    |

Add Select Delete

Exit

3.22 Scroll down the list and click on the 1<sup>st</sup> Academic Discipline of the new starter.

3.23 Click on the drop down of the **Academic Disp 2** field.



MD37G4A Narrative Table Search

Search

Narr Code

| Seq | Code | Desc | Long Description |
|-----|------|------|------------------|
|-----|------|------|------------------|

Exit

3.24 Press **Enter**.

| Seq | Code | Desc | Long Description                          |
|-----|------|------|---|
| 001 | A000 | A000 | A000,Medicine and Dentistry               |
| 002 | A100 | A100 | A100,Pre-clinical Medicine                |
| 003 | A200 | A200 | A200,Pre-clinical Dentistry               |
| 004 | A300 | A300 | A300,Clinical Medicine                    |
| 005 | A400 | A400 | A400,Clinical Dentistry                   |
| 006 | A900 | A900 | A900,Others in Medicine and Dentistry     |
| 007 | A990 | A990 | A990,Medicine and Dentistry not elsewhere |
| 008 | B000 | B000 | B000,Subjects allied to Medicine          |
| 009 | B100 | B100 | B100,Anatomy, Physiology and Pathology    |

3.25 Scroll down the list and click on the 2nd Academic Discipline of the new starter.

3.26 Click on the drop down in the **Regulatory Body** field.

| Seq | Code | Desc | Long Description |
|-----|------|------|------------------|
|-----|------|------|------------------|

3.27 Press **Enter**.

| Seq | Code | Desc      | Long Description                       |
|-----|------|-----------|--|
| 001 | 00   | NtCurrReg | Not currently registered to practice   |
| 002 | 01   | GMC       | General Medical Council                |
| 003 | 02   | GDC       | General Dental Council                 |
| 004 | 03   | GOC       | General Optical Council                |
| 005 | 04   | RPSGB     | Royal Pharmaceutical Society of GB     |
| 006 | 05   | PSNI      | The Pharmaceutical Society of Nireland |
| 007 | 06   | NMC       | The Nursing and Midwifery council NMC  |
| 008 | 07   | HPC       | Health Professions Council             |
| 009 | 08   | GSCC      | General Social Care Council            |

- 3.28 Scroll down the list and click on the new starter's Regulatory Body.
- 3.29 Leave the **Date Left HEI** field blank – when a leaver action is entered for this employee the screen will auto complete.
- 3.30 Leave the **Leaving Destination** blank.
- 3.31 Click in the drop down of the **Active Last Res** field.

- 3.32 Press **Enter**.

**MD37G4A Narrative Table Search** [X]

Search

Narr Code

| Seq | Code | Desc       | Long Description                         |
|-----|------|------------|--|
| 001 | 1    | CatAA*C    | Category A,A* or C selected for assessmt |
| 002 | 2    | CatAA*C    | Category A,A*orC Not Selected for assesm |
| 003 | 3    | Emplyd     | Employed by the rep institution on311007 |
| 004 | 9    | NotEmployd | Not employed by the institution 311007   |
| 005 | X    | Default    | Default                                  |

Add Select Delete

Exit

3.33 Click on the description that applies to the new starter.

3.34 Click in the drop down in the **Unit of Assessment** field.

**MD37G4A Narrative Table Search** [X]

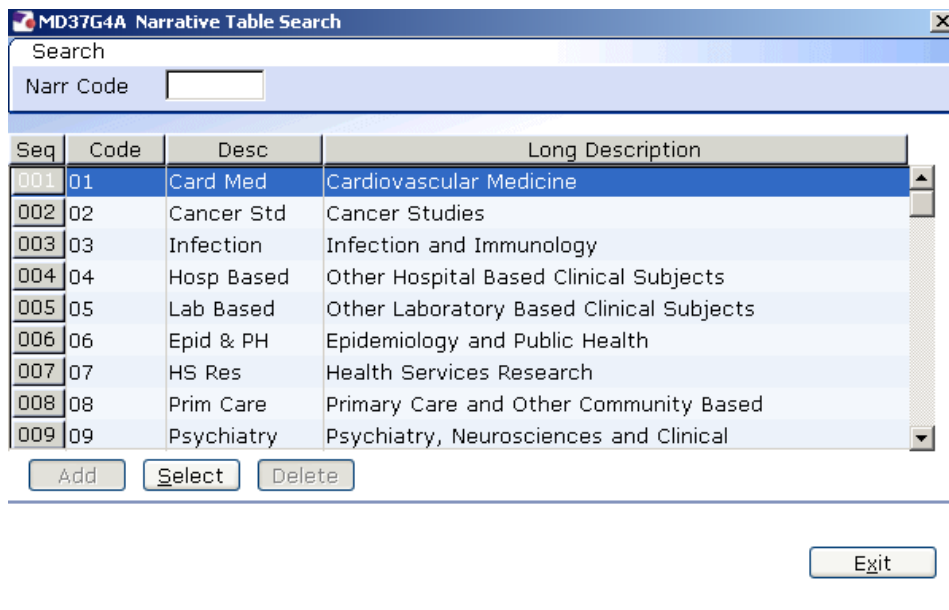
Search

Narr Code

| Seq | Code | Desc | Long Description |
|-----|------|------|------------------|
|-----|------|------|------------------|

Exit

3.35 Press **Enter**.



MD37G4A Narrative Table Search

Search

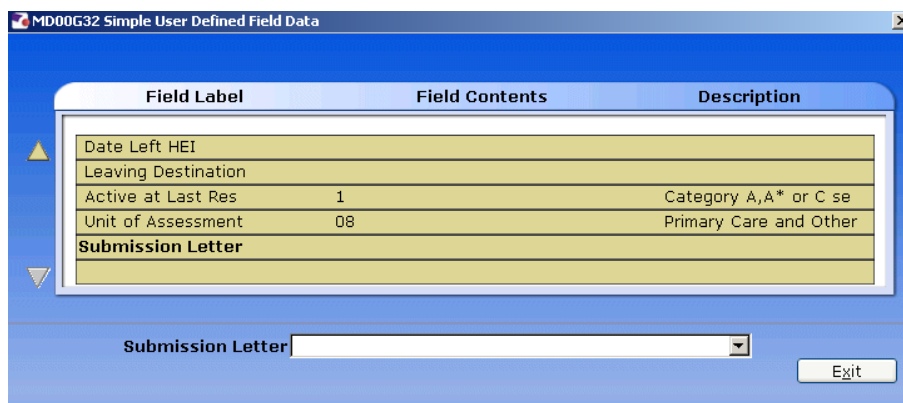
Narr Code

| Seq | Code | Desc       | Long Description                         |
|-----|------|------------|--|
| 001 | 01   | Card Med   | Cardiovascular Medicine                  |
| 002 | 02   | Cancer Std | Cancer Studies                           |
| 003 | 03   | Infection  | Infection and Immunology                 |
| 004 | 04   | Hosp Based | Other Hospital Based Clinical Subjects   |
| 005 | 05   | Lab Based  | Other Laboratory Based Clinical Subjects |
| 006 | 06   | Epid & PH  | Epidemiology and Public Health           |
| 007 | 07   | HS Res     | Health Services Research                 |
| 008 | 08   | Prim Care  | Primary Care and Other Community Based   |
| 009 | 09   | Psychiatry | Psychiatry, Neurosciences and Clinical   |

Add Select Delete

Exit

- 3.36 Scroll down the list and click on the Unit of assessment that applies to this new starter.




MD00G32 Simple User Defined Field Data

| Field Label         | Field Contents | Description            |
|---------------------|----------------|------------------------|
| Date Left HEI       |                |                        |
| Leaving Destination |                |                        |
| Active at Last Res  | 1              | Category A, A* or C se |
| Unit of Assessment  | 08             | Primary Care and Other |
| Submission Letter   |                |                        |


Submission Letter

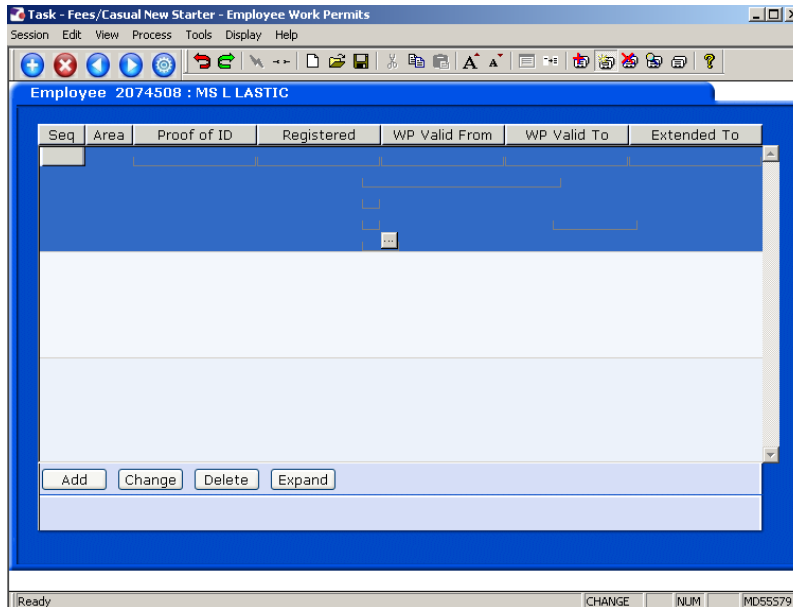
Exit

- 3.37 When you have completed all the HESA fields that apply to this employee, click on **Exit**.

- 3.38 Click on  to move to the next data entry screen.

## 4 Employee Work Permit data entry screen


-  This screen only needs completing if the fees/casual starter that you are entering requires a work permit/visa to work in the UK.




- 4.1 If the new fees/casual starter does need a work permit/visa to work in the UK then click on **Add** to enter the Work Permit details for the employee.

Enter the following information as appropriate (use the **Tab** key to move between fields):

- The date when proof of ID was given
- The date the Work Permit is valid from
- The date the Work Permit is valid to
- The date the Work Permit is extended to (if appropriate)
- The Work Permit/Visa number
- Indicate whether a Home Office letter has been issued
- Whether indefinite leave to remain has been granted (Y) and, if so, on which date.

-  Dates **MUST** be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.

- 4.2 Click on  to move to the next data entry screen.

## 5 Employment Detail data entry screen

5.1 Type in the **Original Start** date and press **ENTER**.

- ☛ Dates **MUST** be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.

5.2 **Window in** to the next field and select the appropriate reason. This will usually be **SG001 New Appointment**.


- ☛ You will have to enter the Reason again in a later field – you must be consistent.

5.3 Press **ENTER**.

5.4 Enter the **Current Start** date and press **ENTER**.

- 📘 If you see a warning dialogue box regarding holiday entitlement just click **OK**.

5.5 **Window in** to the next field and select the appropriate reason. This **MUST** be the same as previously entered

5.6 Click on  to move to the next data entry screen.

## 6 Basic Pay Details data entry screen

Task - Fees/Casual New Starter - Basic Pay Detail

Session Edit View Other Process Tools Display Help

Employee 2074508 : MS L LASTIC

Pay Control

Pay Group

Ctrl group

Pay Type

Pay Method  Cheque

Cheque Pay

Other

Last Paid Year

Period

Date

Suspended Flag  Backdate NI ☐

Industrial Action

Starter Flag

P.Grp History Fin Inst Det Additional P45(Leaver)

Pay Currency Notes

Press WINDOW to select the structure unit the employee belongs to

CHANGE NUM MD4952

### 6.1 Window in to the Pay Group field.

MD45G3 Structure Unit Group selection

| Seq | Structure | Description        | Level      |
|-----|-----------|--------------------|------------|
| 001 | PSUB1     | Staff              | SubPayroll |
| 002 | PSUB2     | Pensioners         | SubPayroll |
| 003 | PSUB3     | Fees/Casual        | SubPayroll |
| 004 | PSUB4     | Teachers           | SubPayroll |
| 005 | PSUB5     | Unpaid             | SubPayroll |
| 006 | PAYROLL1  | (Main Payroll)     | Payroll    |
| 007 | PAYROLL2  | (Teachers Payroll) | Payroll    |
| 008 | PAYROLL3  | (Unpaid)           | Payroll    |

Add Select Delete Expand


Exit


6.2 Select the correct PSUB Pay Group. Fees/Casual starters must always be attached to **PSUB3 (Fees/Casual)**.

6.3 Press **ENTER**. The following dialog box will appear:



6.4 Type the **start date** into the **Effective Date** field and press **Enter**.


 If the employee is full time and starting work on a Monday, the start date must be the Monday. If they are starting mid-week enter the date of their first working day.

 Dates **MUST** be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.

6.5 Leave the **Pay Method** as **CHEQUE**.

6.6 Press **Enter**.

6.7 Enter **N** in the **Suspended Flag** field.

6.8 Click on  to move to the next data entry screen.

## 7 Current Post Holding data entry screen

- 7.1 Click on **Add** to enter the Current Post Holding data for the employee.
- 7.2 Type in the **Start Date**.
  - ☛ Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.
- 7.3 Press **ENTER**.
- 7.4 **Window in** to the **Post** field.
- 7.5 Press **ENTER** three times to display the list of posts.
  - ❗ The Fees/Casual posts will be at the bottom of the list of posts and will all be in the format “XXnn-FEES” (the first two letters refer to the school/ department – so “DD01-FEES” would be a Human Resources Temp Bank post, for example).
- 7.6 Select the relevant post.
- 7.7 Press **ENTER**.
  - ❗ If you see a dialog box warning that the FTE is being exceeded click on **Exit**.
- 7.8 Click in the **Detail** field and **Window in**.

MD47L3 Employee Post Holding Details

Detail

|                |           |                      |
|----------------|-----------|----------------------|
| Post           | DD00-FEES | Fees                 |
| Job            | TEMP/CAS  | Temp/Casual          |
| Employee Grade |           |                      |
| Post Grade     | DEFAULT   | SYSTEM DEFAULT GRADE |

General Conditions Misc Grade Contract

Start 29/03/2010 [dropdown]  
End [dropdown]

Service In Post  
Projected End

Post Main Flag ☐ Suspended ☐

Exc. from attracting Ee's Costs ☐

T/S Template Perf Management User Fields Notes  
Salary Planning Exit

- 7.9 The **Start Date** field and the one to the right of it should be automatically populated. If this is not the case, click on the drop down list (highlighted) to the right of the **Start Date**. A list of reasons will be displayed:

| Seq | Code   | Description                               | Score |
|-----|--------|---|-------|
| 001 | GD001  | Regrading of Post                         |       |
| 002 | LG037  | Visitor to Staff                          |       |
| 003 | PJL001 | Cover for Maternity                       |       |
| 004 | PJL002 | Cover for Career Break/Secondment         |       |
| 005 | PJL003 | Cover for Sabbatical/Study Leave          |       |
| 006 | PJL004 | Promotion                                 |       |
| 007 | PJL005 | Internal Transfer (in dept)-Restructure   |       |
| 008 | PJL006 | Int. Transfer (in dept)-Breakdown in Rel  |       |
| 009 | PJL007 | Internal Transfer (in dept) - Other       |       |
| 010 | PJL008 | Int. Transfer (in dept)-Flex. Working     |       |
| 011 | PJL009 | Internal transfer (out dept)-Restructure  |       |
| 012 | PJL010 | Int. Transfer (out dept)-Breakdown in Rel |       |

Buttons: Add, Select, Delete, Exit

7.10 Select the appropriate reason for this New Starter. In most cases this will be **SG001- New Appointment**.

☛ You will have to enter the **Reason** again in a later field – you must be consistent.

7.11 Type **Y** in the **Post Main Flag** field if this is the employee's main post.

7.12 Press the **Enter** key to move through the remaining fields and on to the **Conditions** tab.

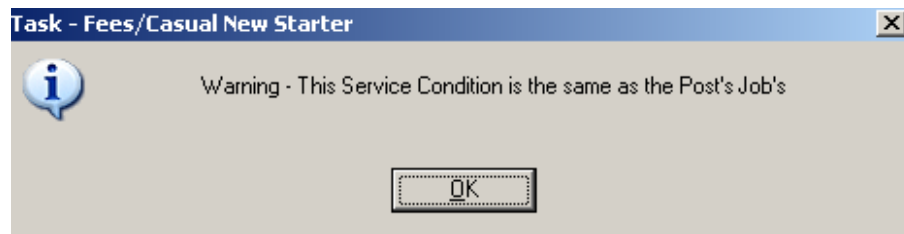
| Seq | Start Date | End Date | Service Condition | Description | Notes |
|-----|------------|----------|-------------------|-------------|-------|
| 001 | 29/03/2010 |          |                   |             |       |

Buttons: Add, Change, Delete, Expand, Exit

7.13 **Window in** to the **Service Cond ID** field.

7.14 Click on **Add** and press **Enter** three times to pull through the Service Conditions.

7.15 The following warning dialogue box will appear:



Click **OK**.

7.16 Click **Exit**.

7.17 **Window in the Position Status Field.** The following screen will appear:

A screenshot of a software window titled 'MD55G30 Employee Position Status'. The window has a 'General' tab. Below the tab, there is a section with the following text: 'Post DD00-FEES Fees' and 'From 29/03/2010 To'. Below this is a table with the following columns: 'Seq', 'Start Date', 'End Date', 'Position Status', 'Description', and 'Notes'. The first row of the table has '001' in the 'Seq' column and '29/03/2010' in the 'Start Date' column. Below the table, there are four buttons: 'Add', 'Change', 'Delete', and 'Expand'. At the bottom right of the window, there is an 'Exit' button.

7.18 Click on **Add**.

7.19 Press **Enter** twice to move to the **Position Status** field and display the drop down list.

**MD55G30 Employee Position Status**

General

Post DD00-FEES Fees

From 29/03/2010 To

| Seq | Start Date | End Date | Position Status | Description | Notes |
|-----|------------|----------|-----------------|-------------|-------|
| 001 | 29/03/2010 |          |                 |             |       |

Code Desc Long Description

PS001 FTP Full Time - Permanent

PS002 PTP Part Time - Permanent

PS003 TTOP Term Time Only - Permanent

PS004 TTOFT Term Time Only - Fixed Term

PS005 FTFT Full Time - Fixed Term

PS006 PTFT Part Time - Fixed Term

PS007 TBANK Temp Bank

PS008 CASUAL Casual Staff

Add Change Delete Expand

- 7.20 Select **CASUAL** from the list.
- 7.21 Press **Enter** to move through the remaining fields and click **Exit**.
- 7.22 **Window in** to the **Wk Pattern** field. The following screen will appear:

**MD47L2 Employee Work Patterns**

General

Post DD00-FEES Fees

From 29/03/2010 To

| Seq | Start Date | End Date | Work Pattern | Description | S | Start Day | Reason |
|-----|------------|----------|--------------|-------------|---|-----------|--------|
| 001 | 29/03/2010 |          |              |             |   |           |        |

Add Change Delete Expand

Exit

- 7.23 Click on **Add** and enter through the fields until you get to **Start Day**.
- 7.24 Enter the digit "1" into the **Start Day** field.
- 7.25 **Window in** to the **Reason** field and select the reason for the appointment.

☛ The reason MUST be the same as was entered at instruction 5.2

7.26 Press **ENTER** and **Exit**.

7.27 Click on to the **Misc** tab.

MD47L3 Employee Post Holding Details

Detail

|                |           |                      |
|----------------|-----------|----------------------|
| Post           | DD00-FEES | Fees                 |
| Job            | TEMP/CAS  | Temp/Casual          |
| Employee Grade |           |                      |
| Post Grade     | DEFAULT   | SYSTEM DEFAULT GRADE |

General Conditions **Misc** Grade Contract

Location

Location HIGHFIELD Highfield Campus, Southampton

Source POST

Average Pay

Average Pay Average Hours

Auto Recalc AvP

T/S Template Perf Management User Fields Notes

Salary Planning Exit

7.28 **Window in** to the **Location** field.

MD47L17 Employee Location

General

|      |            |      |
|------|------------|------|
| Post | DD00-FEES  | Fees |
| From | 29/03/2010 | To   |

| Seq | Start Date | End Date | Location | Description | Source | Reason | Notes |
|-----|------------|----------|----------|-------------|--------|--------|-------|
| 001 | 29/03/2010 |          |          |             |        |        |       |

Add Change Delete Expand

Exit

7.29 Click on **Add** and press **Enter** twice.

7.30 Select the location from the **Location** field drop down list.

7.31 Press **Enter**.

7.32 **Window in** to the **Reason** field and select the reason for the appointment.

☛ The reason **MUST** be the same as was entered at instruction 5.2

7.33 Press **Enter**.

7.34 Click **Exit**.

7.35 Click on the **Grade** tab.

**MD47L3 Employee Post Holding Details**

Detail

|                |           |                      |
|----------------|-----------|----------------------|
| Post           | DD00-FEES | Fees                 |
| Job            | TEMP/CAS  | Temp/Casual          |
| Employee Grade |           |                      |
| Post Grade     | DEFAULT   | SYSTEM DEFAULT GRADE |

General Conditions Misc **Grade** Contract

Pay Grade **DEFAULT** SYSTEM DEFAULT GRADE  
Source EMPPOST

Start Date 29/03/2010  
End Date

Point  
Point Amount  
Point Rate

T/S Template Perf Management User Fields Notes  
Salary Planning

Exit

**Default** grade details should have already pulled through.

7.36 Window in to the **Pay Grade** field.

**MD47G40 Employee Grade History**

General

|      |            |      |
|------|------------|------|
| Post | DD00-FEES  | Fees |
| From | 29/03/2010 | To   |

| Seq | Start Date | End Date | Grade   | Change Reason | Change Source | Grade Source | Notes |
|-----|------------|----------|---------|---------------|---------------|--------------|-------|
| 001 | 29/03/2010 |          | DEFAULT | POSTPL        | POSTGD        |              | N     |

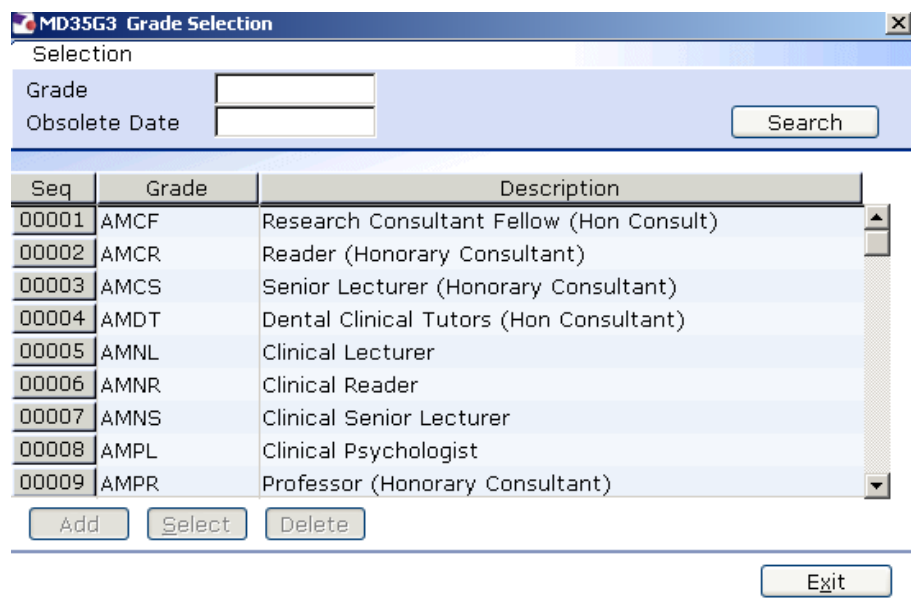
Add Change Delete Expand

Exit

7.37 Click on **Change**.

7.38 **ENTER** through to the **Grade** Field.

7.39 Double-click in to the **Grade** Field and press **ENTER** twice to display the list of Grades.



MD35G3 Grade Selection

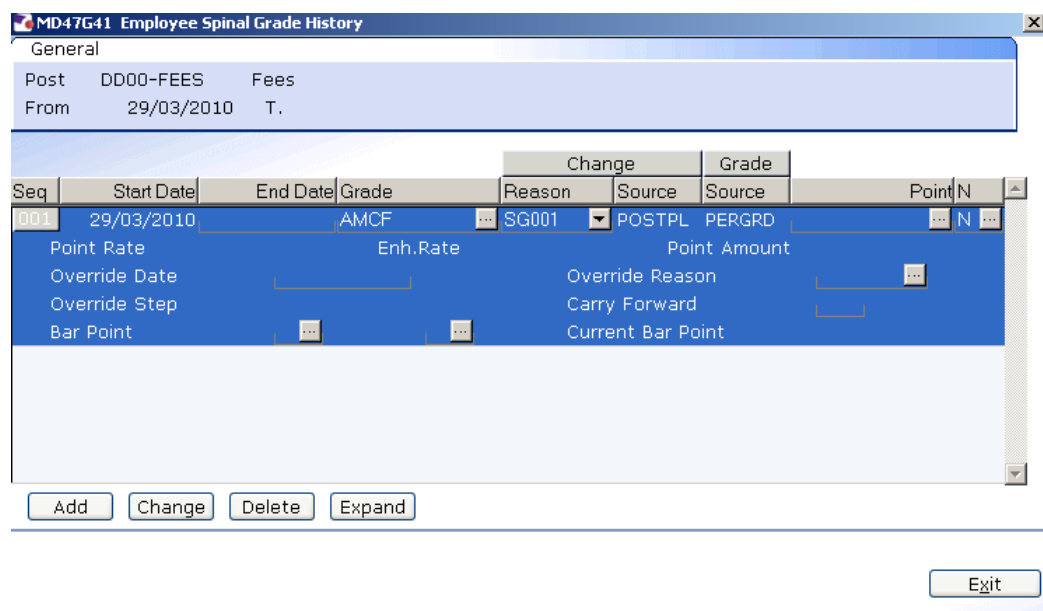
Selection

Grade

Obsolete Date

| Seq   | Grade | Description                              |
|-------|-------|--|
| 00001 | AMCF  | Research Consultant Fellow (Hon Consult) |
| 00002 | AMCR  | Reader (Honorary Consultant)             |
| 00003 | AMCS  | Senior Lecturer (Honorary Consultant)    |
| 00004 | AMDT  | Dental Clinical Tutors (Hon Consultant)  |
| 00005 | AMNL  | Clinical Lecturer                        |
| 00006 | AMNR  | Clinical Reader                          |
| 00007 | AMNS  | Clinical Senior Lecturer                 |
| 00008 | AMPL  | Clinical Psychologist                    |
| 00009 | AMPR  | Professor (Honorary Consultant)          |

- 7.40 Select the appropriate grade.
- 7.41 Press **ENTER** to move to the **Reason** field.
- 7.42 Double-click on the **Reason** field and select the reason for the appointment.
- ☛ The reason **MUST** be the same as was entered at instruction 5.2
- 7.43 Click on **Exit**.
- 7.44 Window in to the **Pay Grade** field again.



MD47G41 Employee Spinal Grade History

General

Post DD00-FEES Fees

From 29/03/2010 T.

| Seq | Start Date | End Date | Grade | Change | Reason | Source | Source | Point | N |
|-----|------------|----------|-------|--------|--------|--------|--------|-------|---|
| 001 | 29/03/2010 |          | AMCF  | ...    | SG001  | POSTPL | PERGRD | ...   | N |

Point Rate Enh.Rate Point Amount

Override Date Override Reason

Override Step Carry Forward

Bar Point Current Bar Point

- 7.45 Click on **Change**.



7.46 **Window in** to the **Point** field and select the Salary Point for this employee.

MD47G41 Employee Spinal Grade History

General

Post DD00-FEES Fees

From 29/03/2010 T.

| Seq | Start Date | End Date | Grade | Reason | Source | Source | Point |
|-----|------------|----------|-------|--------|--------|--------|-------|
| 001 | 29/03/2010 |          | AMCF  | SG001  | POSTPL | PERGRD | N     |

Point Rate Enh. Rate Point Amount

Override Date Override Reason

Override Step Carry Forward

Bar Point Current Bar Point

Add Change Delete Expand

Exit

7.47 **ENTER** through the remaining fields.

7.48 Click on **Exit**.

7.49 Click on the **Contract** tab.

MD47L3 Employee Post Holding Details

Detail

Post DD00-FEES Fees

Job TEMP/CAS Temp/Casual

Employee Grade

Post Grade DEFAULT SYSTEM DEFAULT GRADE

General Conditions Misc Grade Contract

Redeployment Reason

Projected End Date

Contract Number

HESA Indicator

T/S Template Perf Management User Fields Notes

Salary Planning

Exit

You can ignore the **Redeployment Reason**, **Projected End Date** and **Contract Number** fields as these are not relevant to Temp Bank.

7.50 Type **A** into the **HESA Indicator** field.

7.51 Click on the **User Fields** icon at the bottom of the screen.

| Field Label          | Field Contents | Description |
|----------------------|----------------|-------------|
| Probation End Date   |                |             |
| Prob Confirmation    |                |             |
| Prob Ext. Date 1     |                |             |
| Prob Ext. Date 2     |                |             |
| NHS Honorary C'tract |                |             |
| Sch/Dept Contact     |                |             |

Sch/Dept Contact

Exit

7.52 Using the **Scroll** arrows at the left hand side of the screen, scroll down and then click into the **Sch/ Dept Contact** field


7.53 Type the name of the **Contact** in the yellow field

7.54 Press **Enter**

 This will automatically move to the **Contact Number** field

7.55 Type the telephone number of the **Sch/Dept Contact** in the yellow field

7.56 Press **Enter**

 This will automatically move to the **Authorised Signatory** field

7.57 Type the telephone number in the yellow field

| Field Label          | Field Contents | Description |
|----------------------|----------------|-------------|
| Contact Extension No | 23824          |             |
| Authorised Signatory | Mr Test        |             |
| Job Details          |                |             |
| Location             |                |             |
| Visitor Title        |                |             |
| HMS Reference Number |                |             |

Job Details


Exit

7.58 Click on **Exit**

7.59 Press **ENTER** and click on **Exit**.

7.60 Click on  to save the changes.

## 8 Unit of Assessment

8.1 Select  to display the screens available within this Task.

8.2 Click on Unit of Assessment and SELECT

CTTASKVW View Current Screens in Task

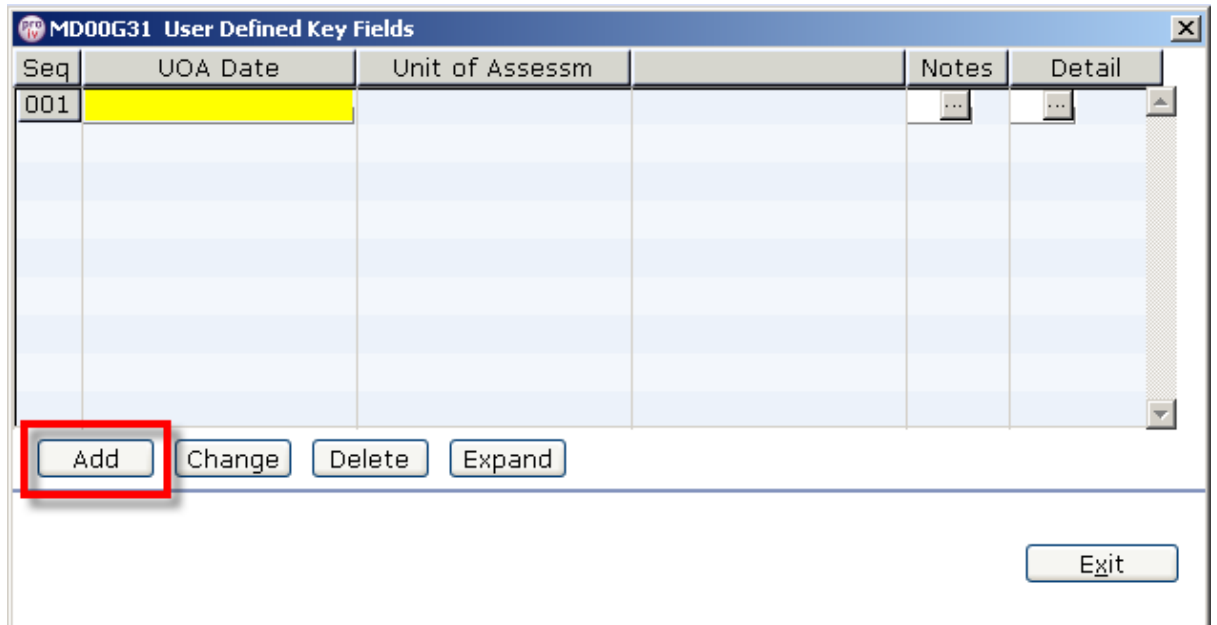
| Seq | Screen  | Screen Name                    | Status |
|-----|---------|--------------------------------|--------|
| 001 | MD55S3  | Personal Details               | <      |
| 002 | MD55S12 | Person Equal Opportunities     |        |
| 003 | MD55S4  | Person Relationship Summary    |        |
| 004 | MD55S79 | Employee Work Permits          |        |
| 005 | MD49S2  | Employee Basic Pay Details     |        |
| 006 | MD47S1B | Employee Current Post Holding  |        |
| 007 | MD47S7  | Employee Post Holding History  |        |
| 008 | MD47S23 | Employee Post Holding Costing  |        |
| 009 | MD55S77 | Individual Employment Check De |        |
| 010 | USUOA   | Unit of Assessment             |        |

Enter Screen ID or press WINDOW to select

Add Select Delete

Exit

8.3 Click on **Add** to enter the UoA Date.

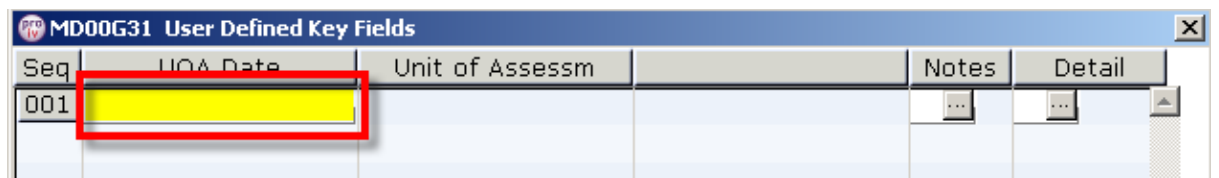


The screenshot shows a dialog box titled "MD00G31 User Defined Key Fields". It contains a table with the following columns: Seq, UOA Date, Unit of Assessm, Notes, and Detail. The first row has the value "001" in the Seq column. Below the table, there are four buttons: "Add", "Change", "Delete", and "Expand". The "Add" button is highlighted with a red rectangle. There is also an "Exit" button in the bottom right corner.

| Seq | UOA Date | Unit of Assessm | Notes | Detail |
|-----|----------|-----------------|-------|--------|
| 001 |          |                 |       |        |

Buttons: Add, Change, Delete, Expand, Exit

8.4 Double click in the UOA Date field



The screenshot shows the same dialog box as in step 8.3. The "UOA Date" field in the first row is highlighted with a red rectangle, indicating it is the focus for the next step.

| Seq | UOA Date | Unit of Assessm | Notes | Detail |
|-----|----------|-----------------|-------|--------|
| 001 |          |                 |       |        |

8.5 The following screen will be displayed. Press **ENTER**.

MD37G4A Narrative Table Search

Search

Narr Code

| Seq | Code | Desc | Long Description |
|-----|------|------|------------------|
|-----|------|------|------------------|

Exit

8.6 Click on the appropriate description and click **SELECT**

MD37G4A Narrative Table Search

Search

Narr Code

| Seq | Code   | Desc     | Long Description |
|-----|--------|----------|------------------|
| 001 | BNCH10 | BNCH2010 | Benchmark 2010   |
| 002 | BNCH11 | BNCH2011 | Benchmark 2011   |
| 003 | BNCH12 | BNCH12   | Benchmark 2012   |
| 004 | BNCH13 | BNCH13   | Benchmark 2013   |
| 005 | BNCH14 | BNCH14   | Benchmark 2014   |
| 006 | RAE08  | RAE2008  | RAE 2008         |

Add **Select** Delete

Exit

☛ All Units of Assessments should be entered against UoA Date: Benchmark 2010 until advised otherwise by the HR Systems Team.

- 8.7 Within the Unit of Assessment field click on the drop down icon to display the data available for selection

| Seq | UOA Date | Unit of Assessm | Notes | Detail |
|-----|----------|-----------------|-------|--------|
| 001 | BNCH10   |                 | ...   | ...    |

Buttons: Add, Change, Delete, Expand, Exit

- 8.8 Press ENTER

Search

Narr Code

| Seq | Code | Desc | Long Description |
|-----|------|------|------------------|
|-----|------|------|------------------|

Exit

8.9 Click on the appropriate description and click **SELECT**

MD37G4A Narrative Table Search

Search

Narr Code

| Seq | Code | Desc       | Long Description                       |
|-----|------|------------|--|
| 001 | 02   | Cancer Std | Cancer Studies                         |
| 002 | 04   | Hosp Based | Other Hospital Based Clinical Subjects |
| 003 | 08   | Prim Care  | Primary Care and Other Community Based |
| 004 | 11   | Nursing    | Nursing and Midwifery                  |
| 005 | 12   | AHP        | Allied Health Professions and Studies  |
| 006 | 14   | Bio Scienc | Biological Sciences                    |
| 007 | 17   | Earth Sys  | Earth Systems & Environmental Sciences |
| 008 | 18   | Chemistry  | Chemistry                              |
| 009 | 19   | Physics    | Physics                                |

Add Select Delete

Exit

8.10 If known enter Unit of Assessment End Date by windowing in on the **DETAILS** field.

MD00G31 User Defined Key Fields

| Seq | UOA Date | Unit of Assessm | Notes | Detail |
|-----|----------|-----------------|-------|--------|
| 001 | BNCH10   | 18              | N ... | ...    |

Add Change Delete Expand

Exit

☛ End Date details can be added at a later date

8.11 Type the End Date into the highlighted field and press **ENTER**

The screenshot shows a software interface with a blue header and a table. The table has three columns: 'Field Label', 'Field Contents', and 'Description'. The first row of the table has 'End Date' in the 'Field Label' column and is highlighted in yellow. Below the table, there is a search bar with the text 'End Date' and a yellow input field containing '301110'. To the right of the input field is a dropdown arrow. An 'Exit' button is located at the bottom right of the interface.

| Field Label | Field Contents | Description |
|-------------|----------------|-------------|
| End Date    |                |             |
|             |                |             |
|             |                |             |
|             |                |             |
|             |                |             |

End Date 301110

Exit

This screenshot shows the same interface as the previous one, but the date '30/11/2010' has been entered into the yellow input field of the search bar. The first row of the table, 'End Date', is still highlighted in yellow. The 'Exit' button remains at the bottom right.

| Field Label | Field Contents | Description |
|-------------|----------------|-------------|
| End Date    | 30/11/2010     |             |
|             |                |             |
|             |                |             |
|             |                |             |
|             |                |             |

End Date 30/11/2010

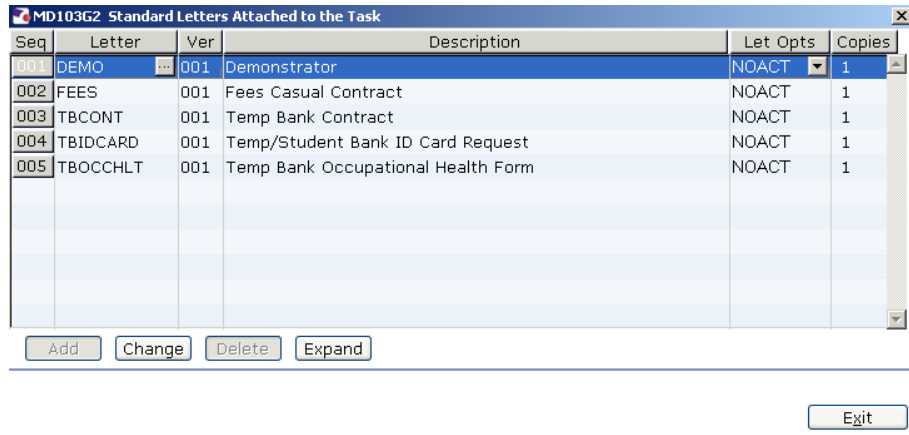
Exit

8.12 Click **Exit**.



🔥 **Ensure that an End Date is inputted before a new Start Date is entered.**

## 9 Standard letters



| Seq | Letter   | Ver | Description                        | Let Opts | Copies |
|-----|----------|-----|------------------------------------|----------|--------|
| 001 | DEMO     | 001 | Demonstrator                       | NOACT    | 1      |
| 002 | FEES     | 001 | Fees Casual Contract               | NOACT    | 1      |
| 003 | TBCONT   | 001 | Temp Bank Contract                 | NOACT    | 1      |
| 004 | TBIDCARD | 001 | Temp/Student Bank ID Card Request  | NOACT    | 1      |
| 005 | TBOCCHLT | 001 | Temp Bank Occupational Health Form | NOACT    | 1      |

Buttons: Add, Change, Delete, Expand, Exit

- 9.1 Click in the **Let Opts** field of the standard letter you want to produce and select **Merge**.
- 9.2 Click on **Select** or **Exit** as appropriate through the pop up screens
- 9.3 Click on **Exit**.
- 9.4 The Fees Casual contract should generate in **Word** and you can print as normal.