This work instruction was last updated: 10th May 2012

Fees/Casual New Starter Process

This Work Instruction describes the Temp Bank New Starter Process.

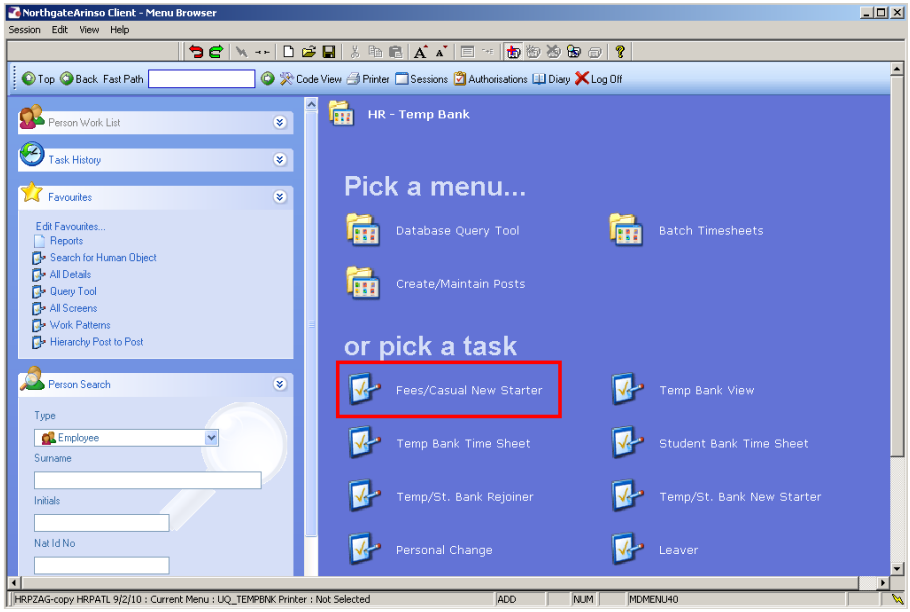
ⓘ If the person is a past employee of the University you will need to enter them on the system using the **Rejoiner** task.

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.

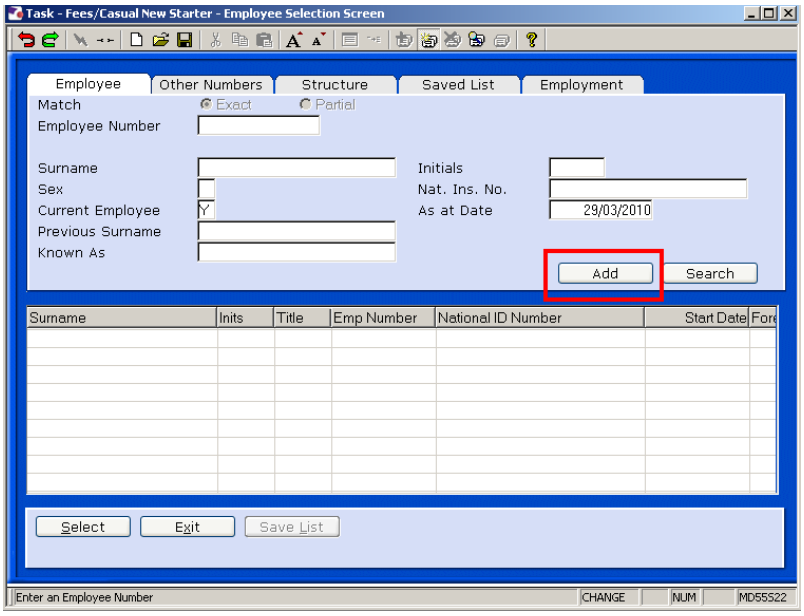
1	Setting up a New Starter
2	Personal Details data entry screen
3	Equal Opportunities data entry screen
4	Employee Work Permit data entry screen
5	Employment Detail data entry screen
6	Basic Pay Details data entry screen
7	Current Post Holding data entry screen
8	Unit of Assessment
9	Standard letters

1 Setting up a New Starter

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

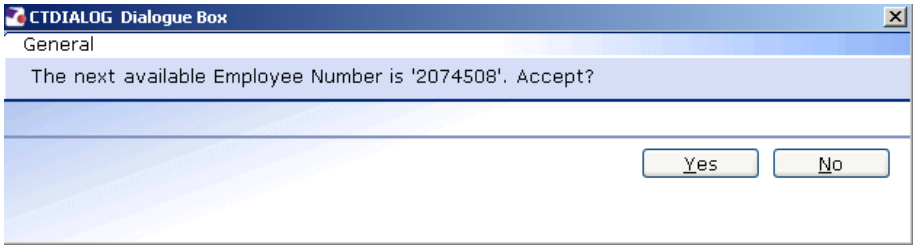


1.2 The Employee Selection Screen will be displayed.



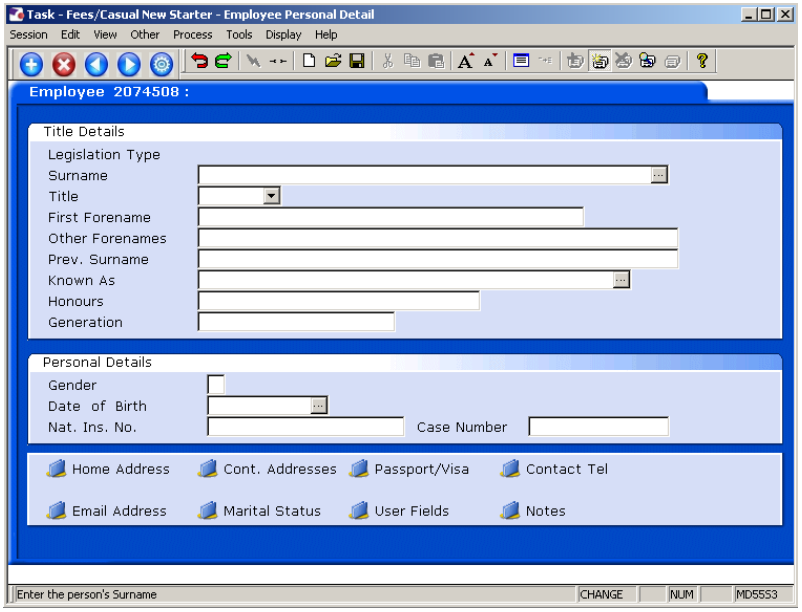
1.3 To add a new starters select ADD

1.4 A New Employee Number will be generated.



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

2 Personal Details data entry screen

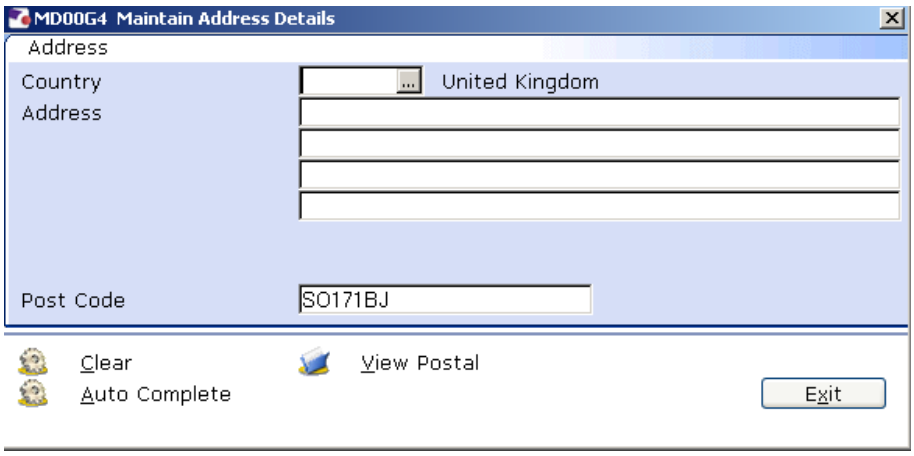


2.1 Enter all known details in the relevant fields. If you do not know the National Insurance Number a temporary one will be generated by ResourceLink.

- 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.

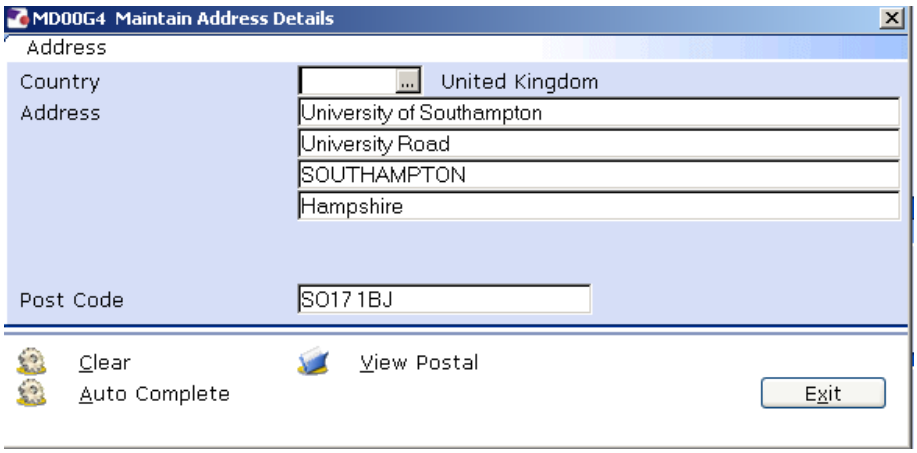
2.3 Enter the **Post Code** and press **ENTER**.



2.4 Click on **Auto Complete**.

2.5 Click on the correct address if given options

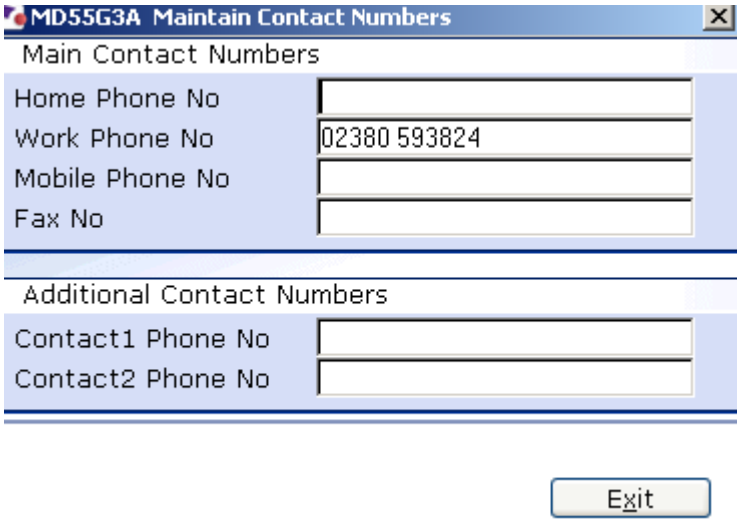
2.6 Click on **Exit**.



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

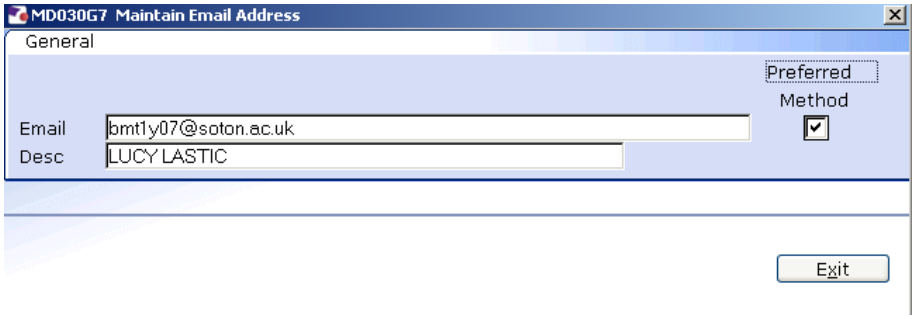
2.7 Click **Exit**.

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



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

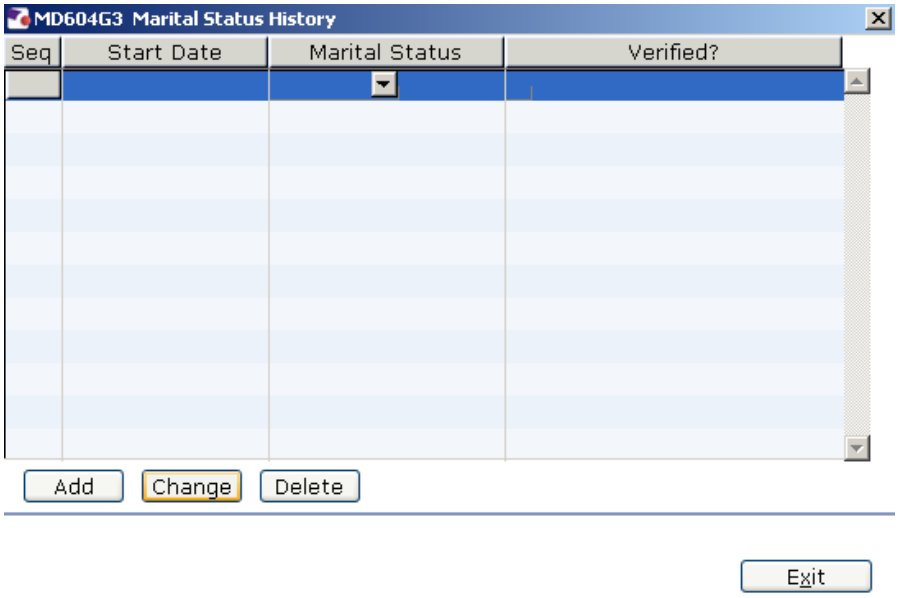
2.10 Click on **Email Address** to enter the email address details.



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

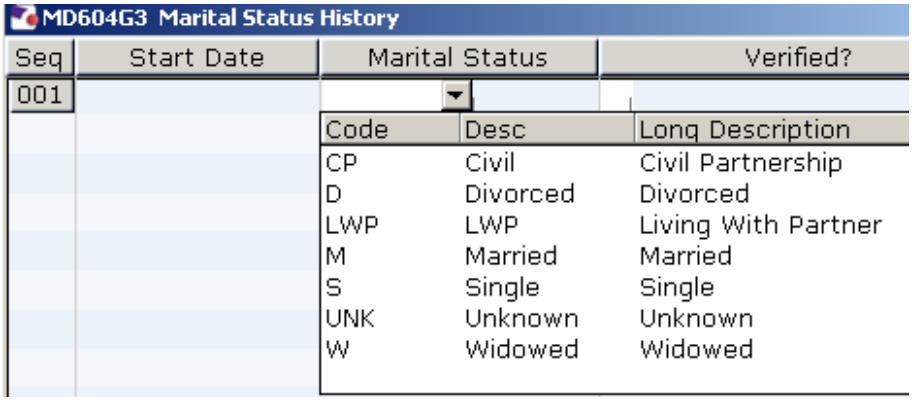
2.12 Click on **Marital Status** to enter the relevant information.

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



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

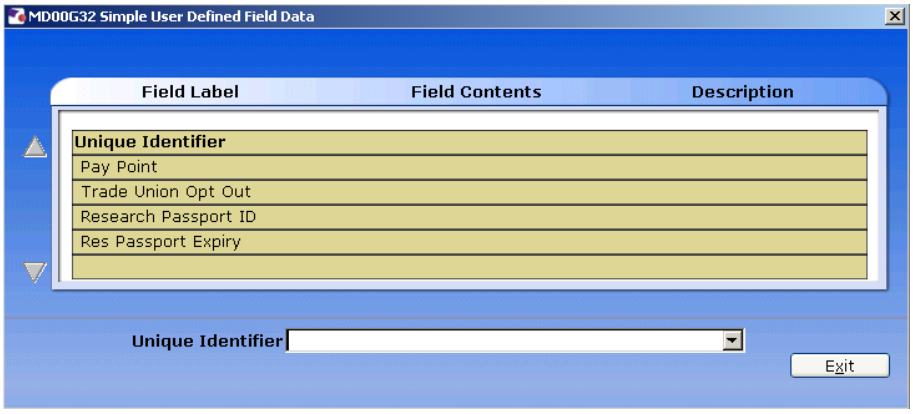
2.15 Click on the drop down and select the **Marital Status**.



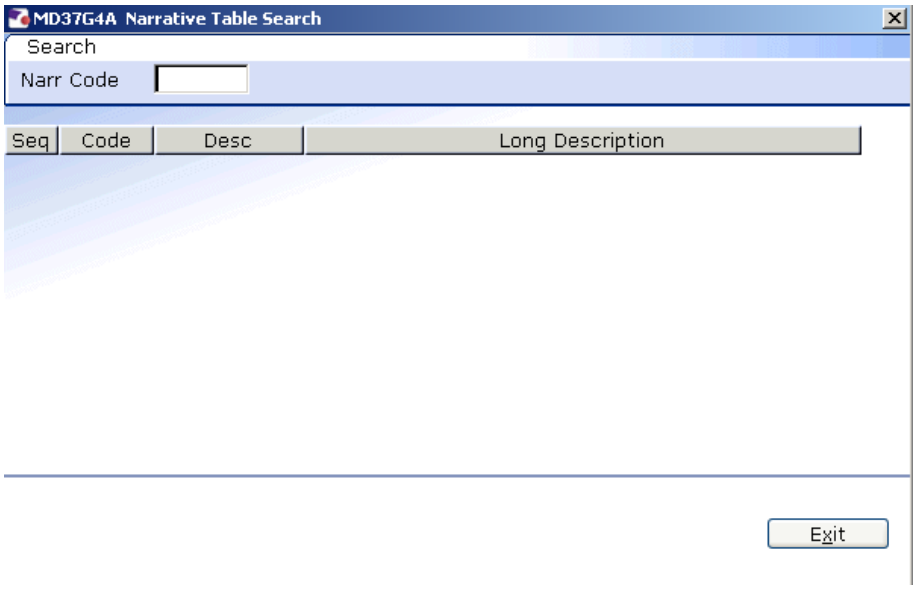
2.16 If the marital status has been verified, enter a **Y** in the **Verified** field.

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.

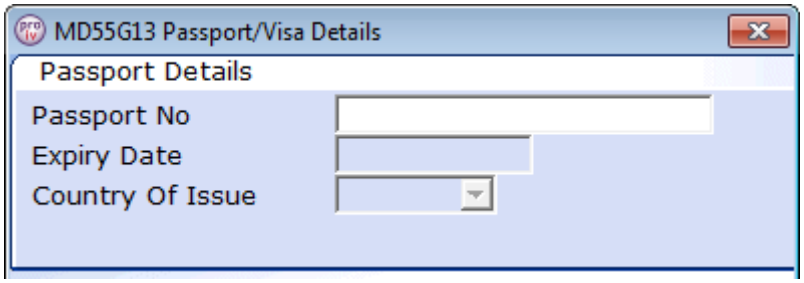


2.20 Press the **ENTER** key to display the list of available **Pay Points**.

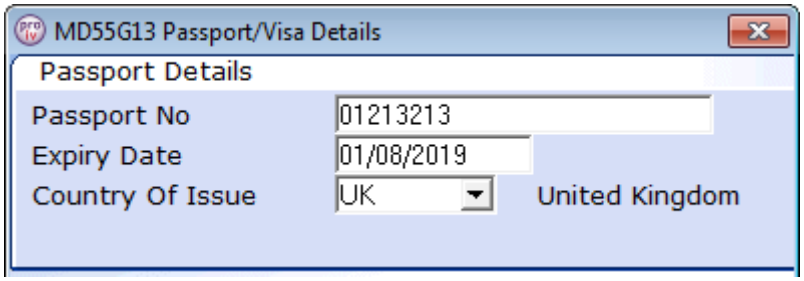
2.21 Click on the required **Pay Point** and then click on **Exit**.

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.



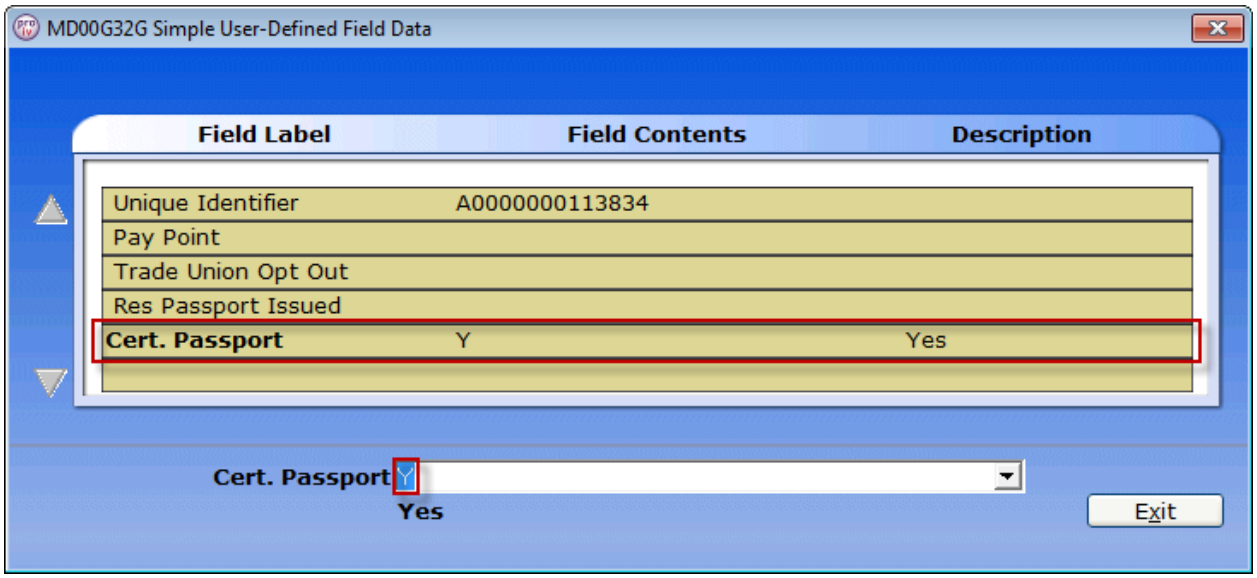
2.23 Complete the 3 fields.



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.

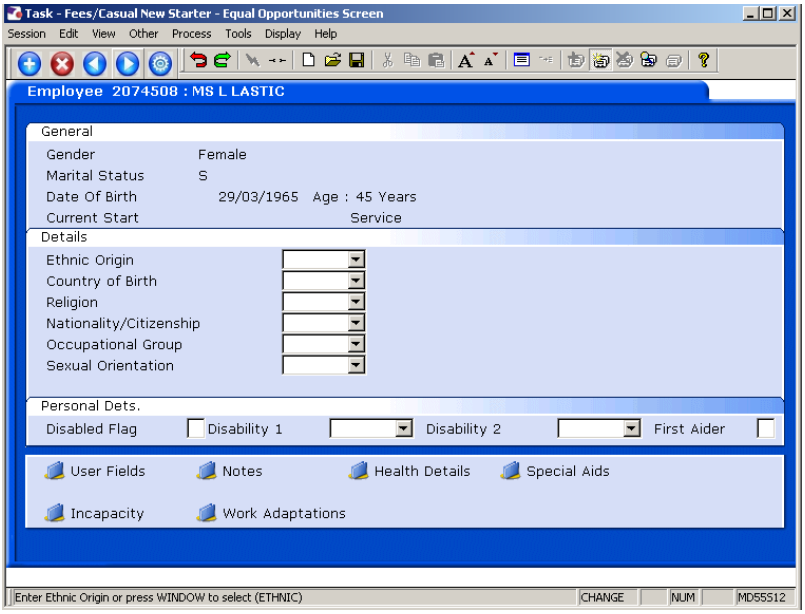


2.27 Press Enter for it to accept the Y and then click on Exit.

2.28 Click on

to move to the next data entry screen.

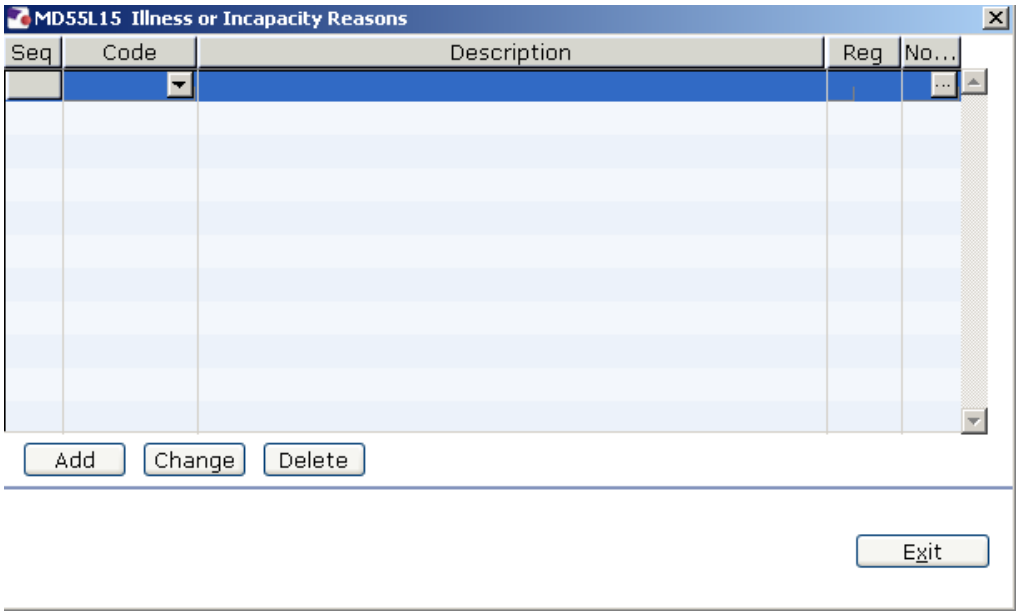
3 Equal Opportunities data entry screen



3.1 Complete the following fields only:

Ethnic Origin
Nationality/Citizenship
Disabled Flag (if necessary)
First Aider (if necessary)

3.2 If the Disabled Flag is set to **Y**, you MUST complete the incapacity information by clicking on **Incapacity**.



3.3 Click on **Add** to enter the details of the incapacity.

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

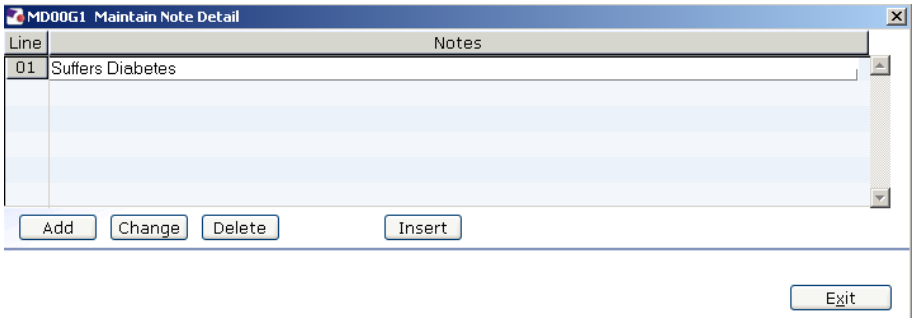
3.4 Click on the drop down arrow in the **Code** field to display a list of incapacity reasons.

3.5 Select the appropriate incapacity reason.

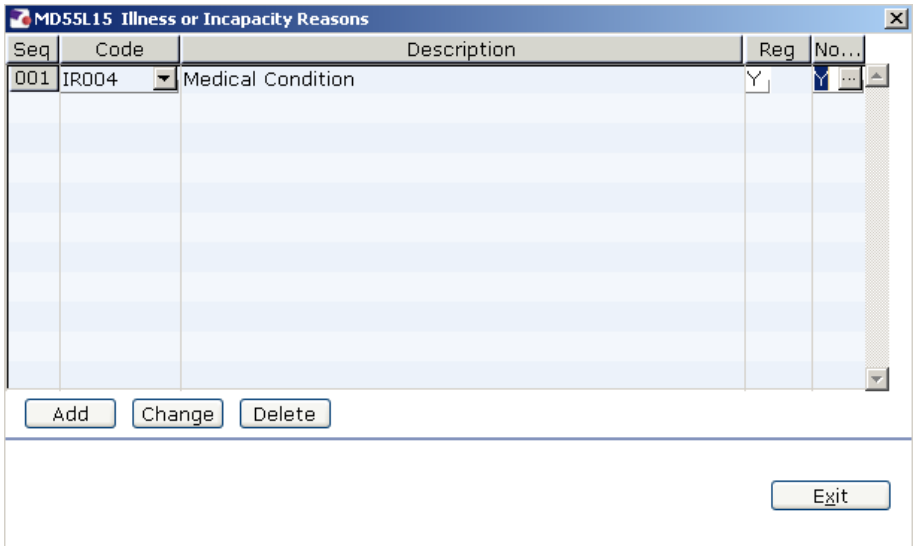
The Description will appear as you **ENTER** through the fields.

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

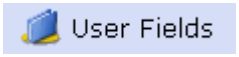
- Only window into the **Notes** field if you need to record conditions that school managers would need to be aware of. i.e. Diabetes.



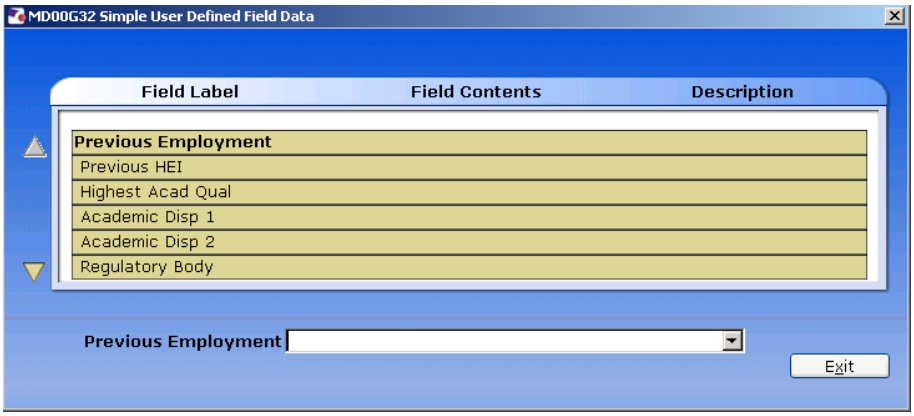
3.7 Click **Exit**.



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

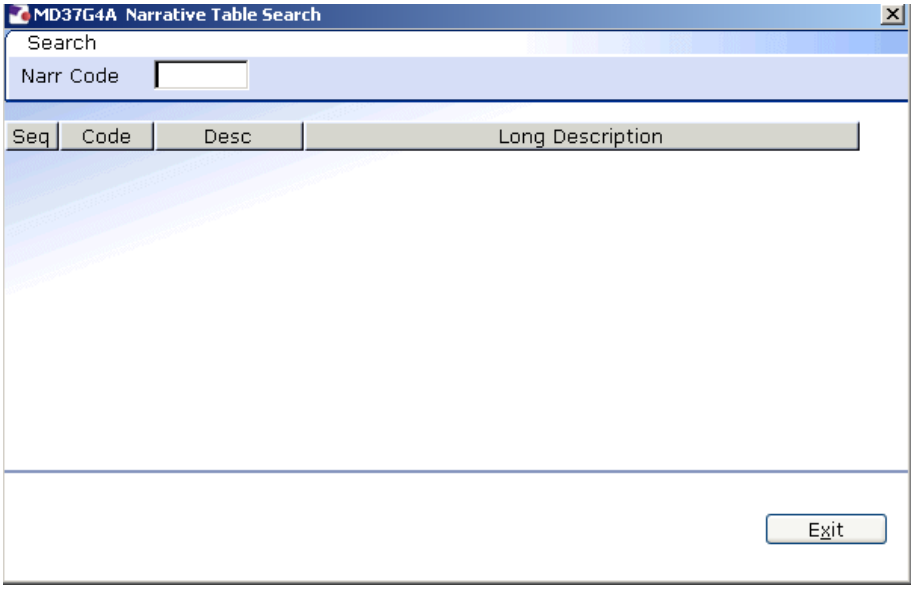
3.9 Click on 

to complete **HESA information.**

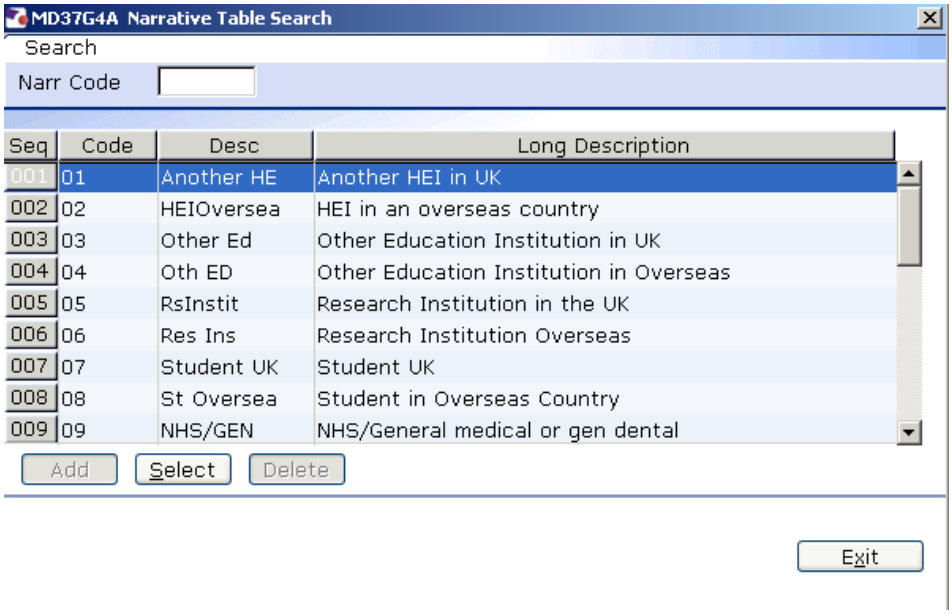


3.10 In **Date 1st App CurrHEI** – enter the date that the starter was first employed at the University of Southampton.

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

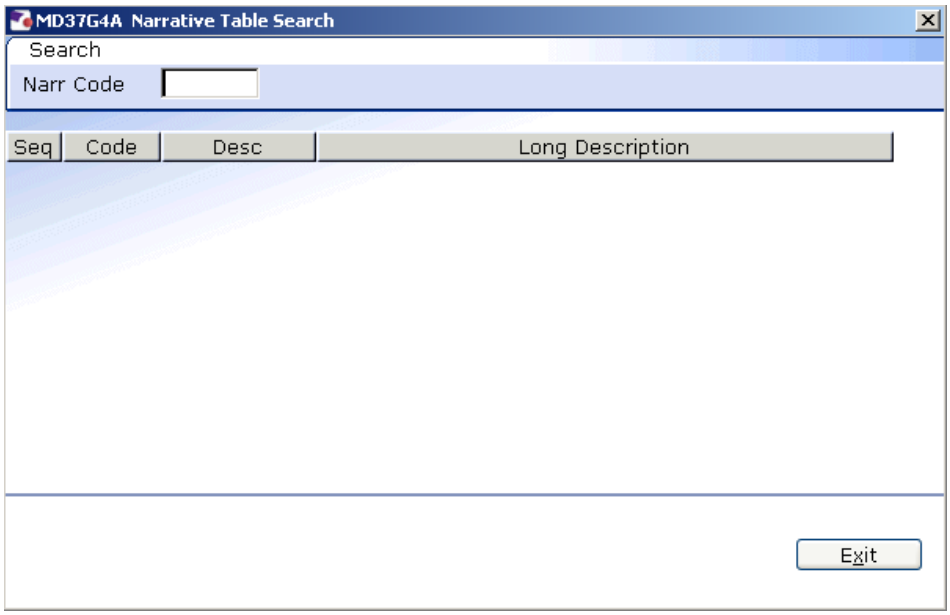


3.12 Press **Enter.**



3.13 Scroll down the list and click on the previous employment of the new starter.

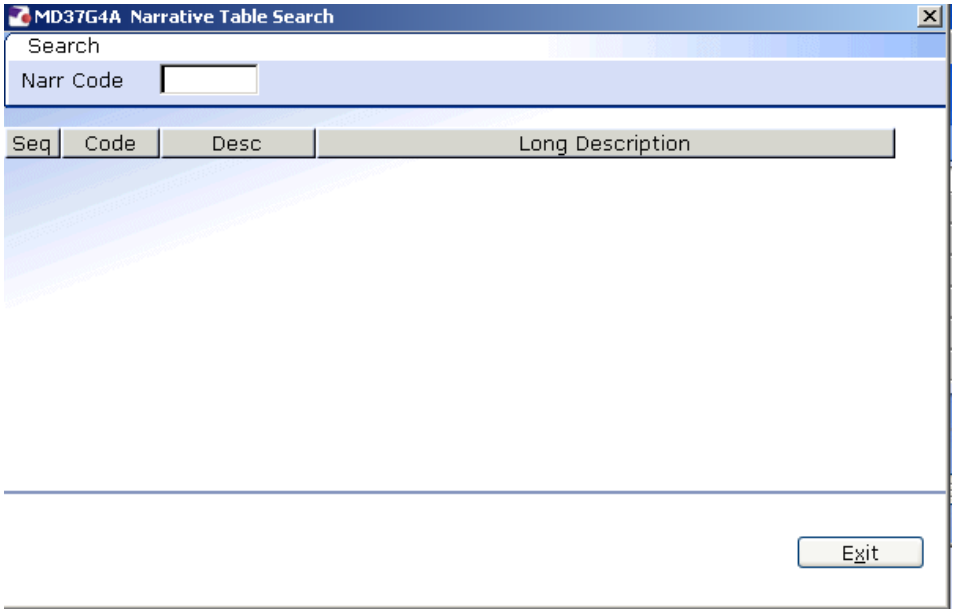
3.14 Click on the drop down in the **Previous HEI** field if the new starter has previously worked at another higher education institute.



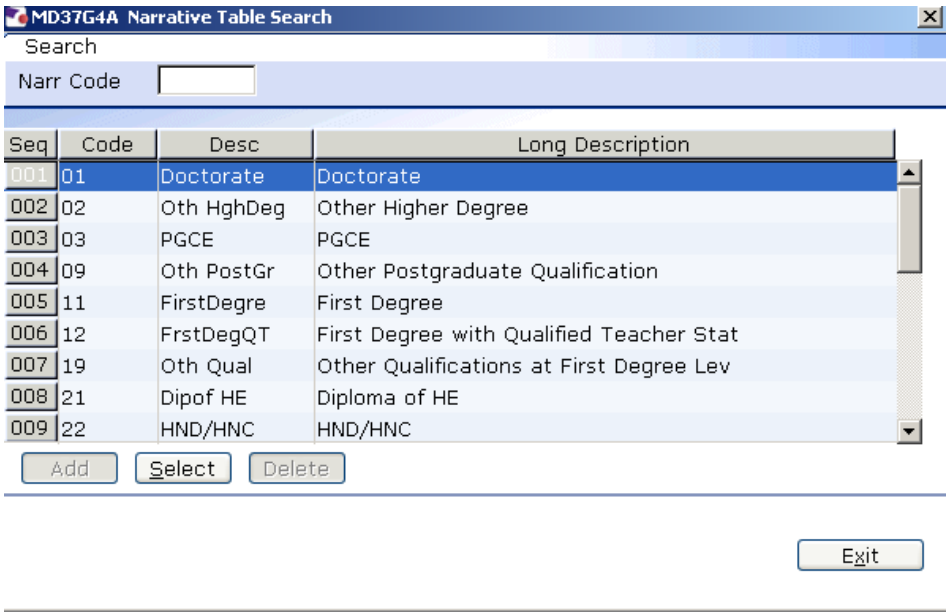
3.15 Press **Enter.**

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.

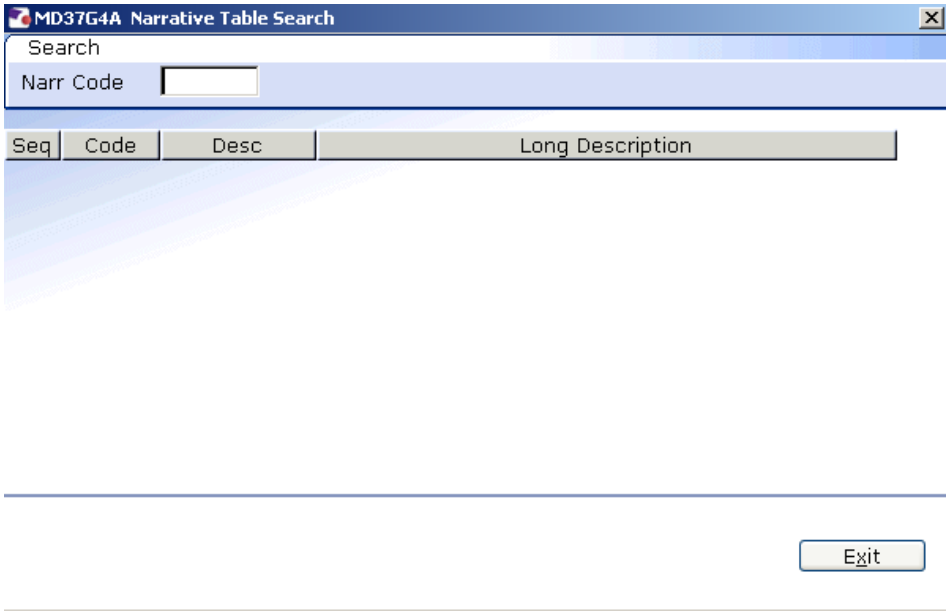


3.18 Press **Enter.**

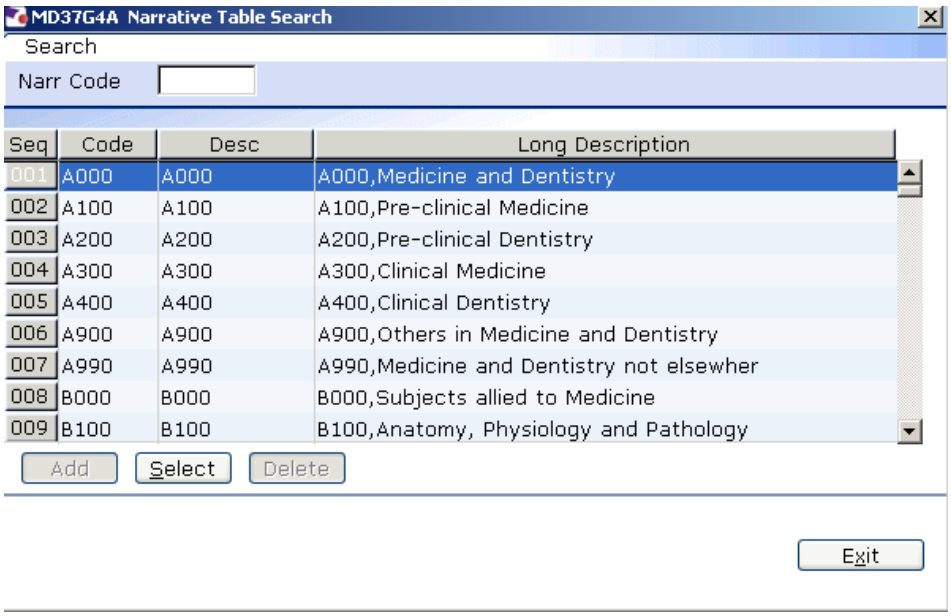


3.19 Scroll down the list and click on the Highest Academic Qualification that the new starter holds.

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

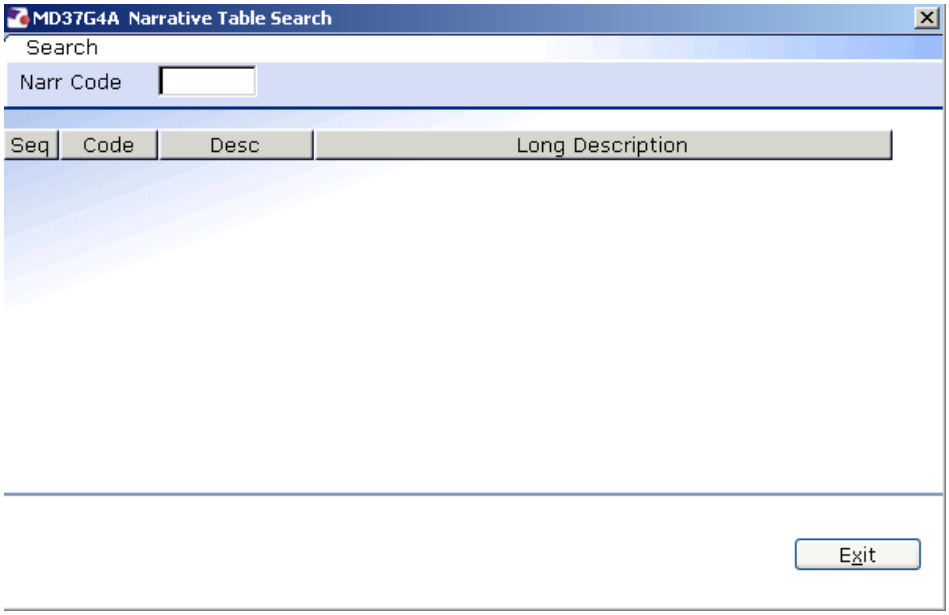


3.21 Press **Enter.**

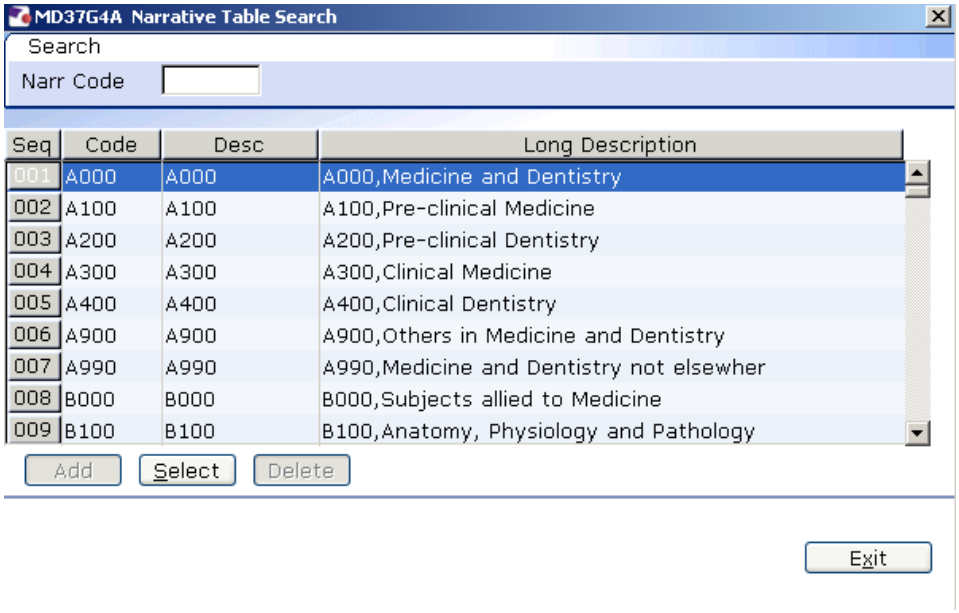


3.22 Scroll down the list and click on the 1st Academic Discipline of the new starter.

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

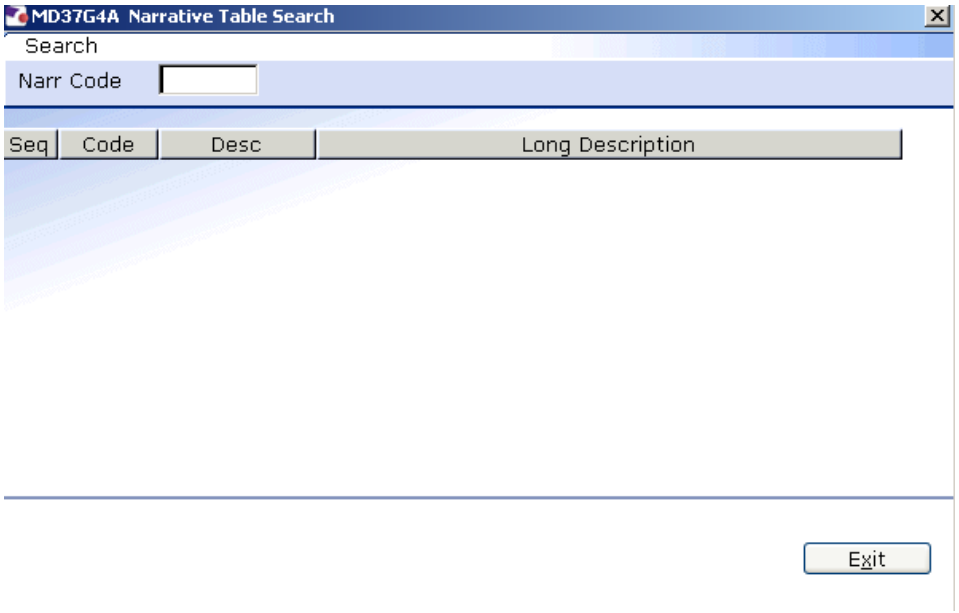


3.24 Press **Enter.**

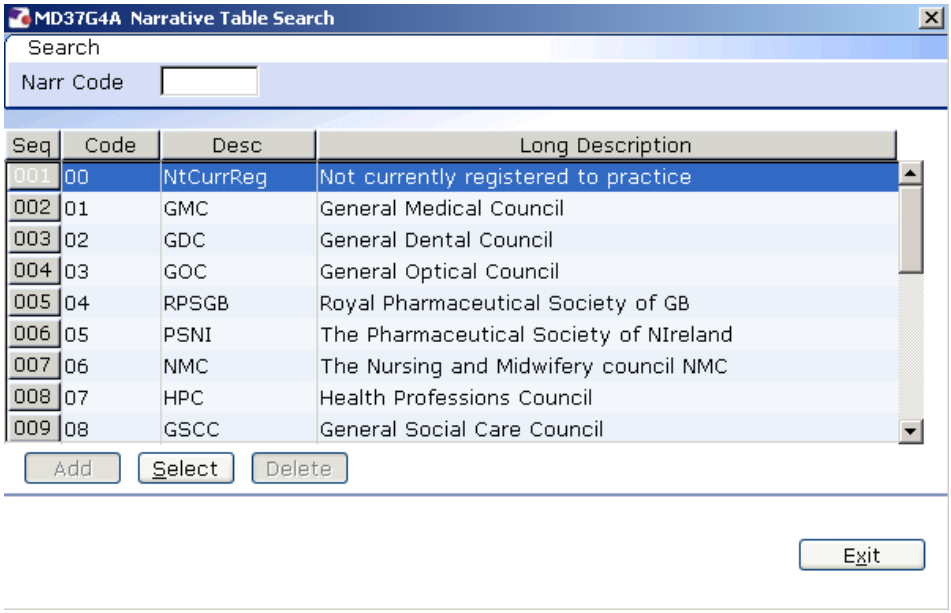


3.25 Scroll down the list and click on the 2nd Academic Discipline of the new starter.

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



3.27 Press **Enter.**

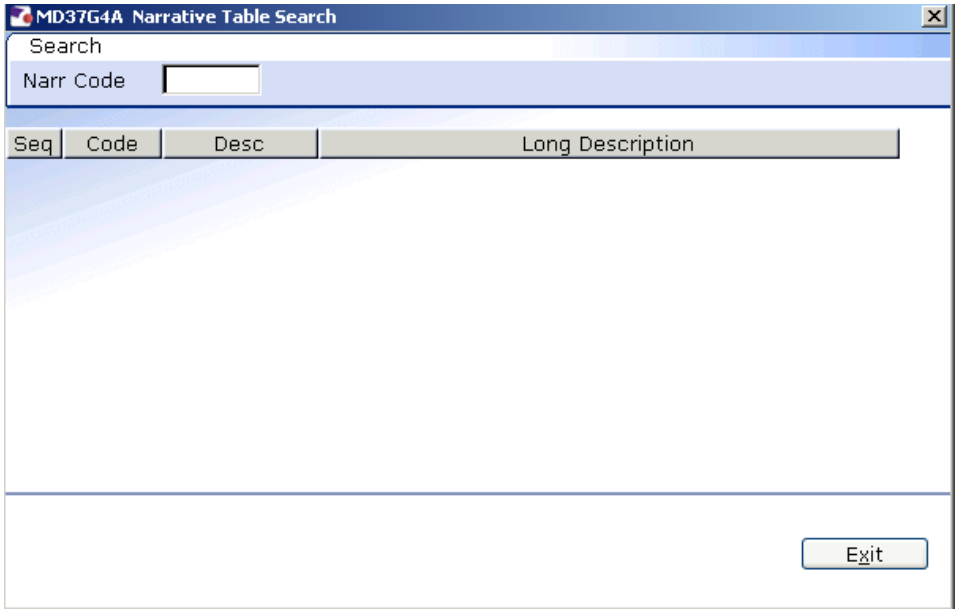


3.28 Scroll down the list and click on the new starter's Regulatory Body.

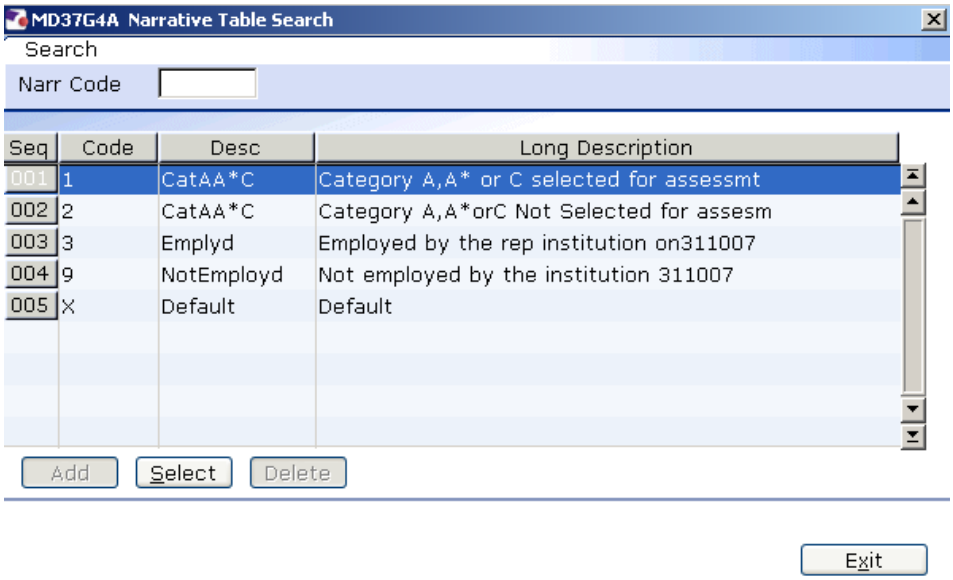
3.29 Leave the **Date Left HEI** field blank – when a leaver action is entered for this employee the screen will auto complete.

3.30 Leave the **Leaving Destination** blank.

3.31 Click in the drop down of the **Active Last Res** field.

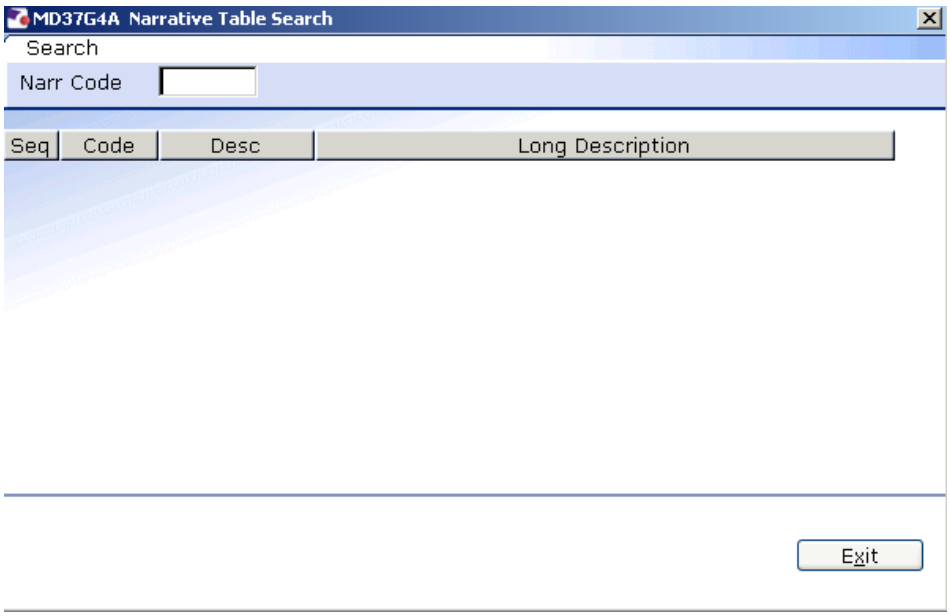


3.32 Press **Enter.**

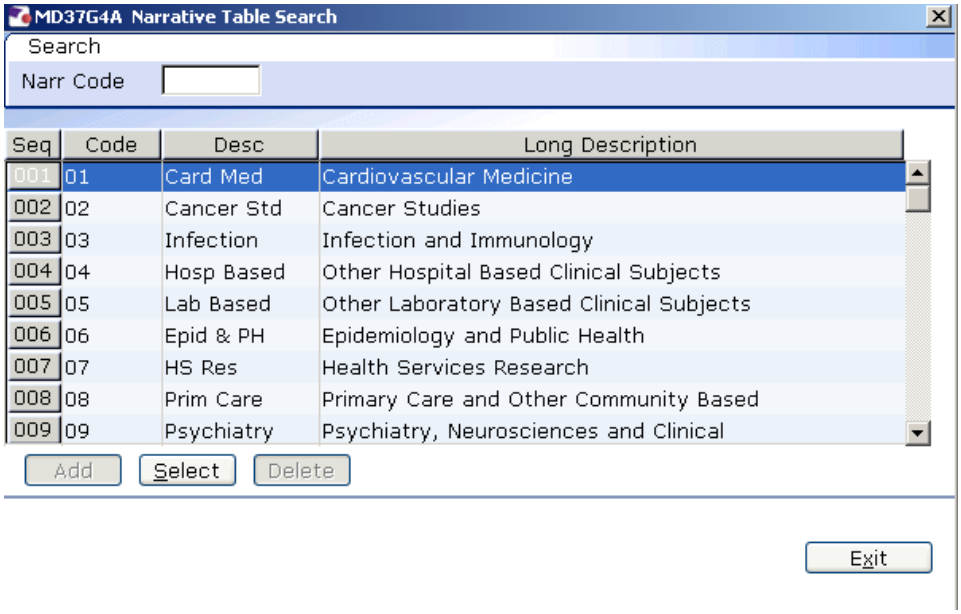


3.33 Click on the description that applies to the new starter.

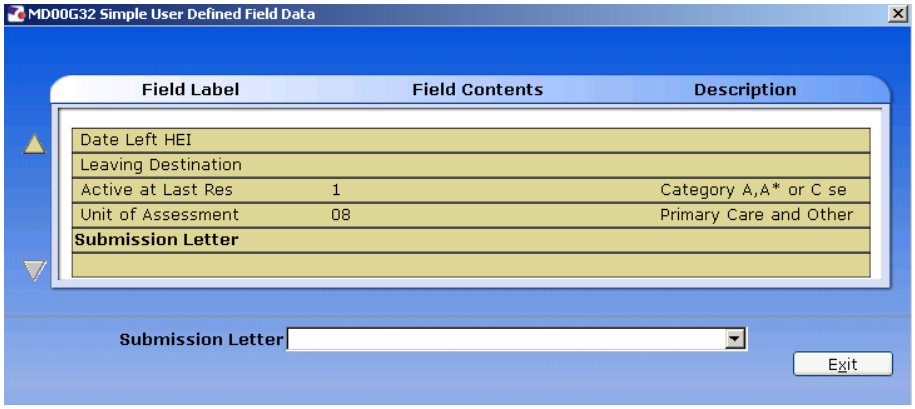
3.34 Click in the drop down in the **Unit of Assessment** field.



3.35 Press **Enter.**



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

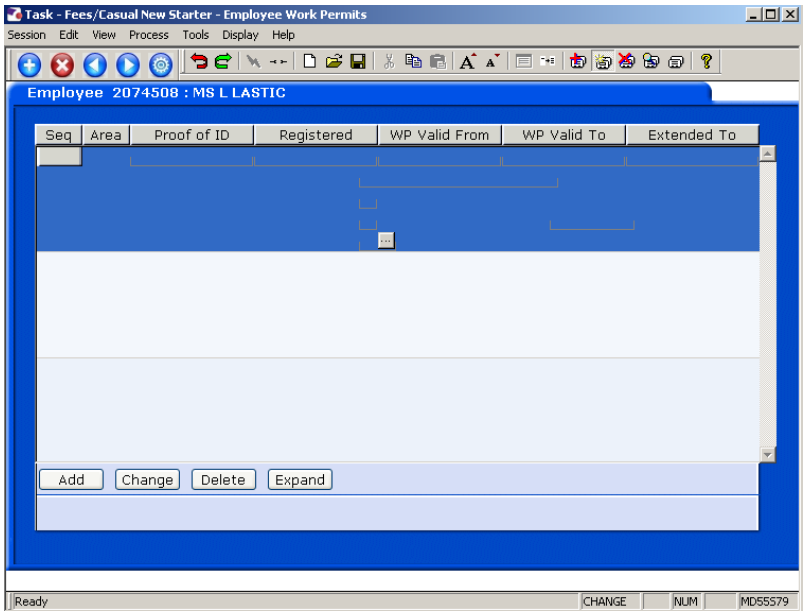


3.37 When you have completed all the HESA fields that apply to this employee, click on **Exit**.

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.

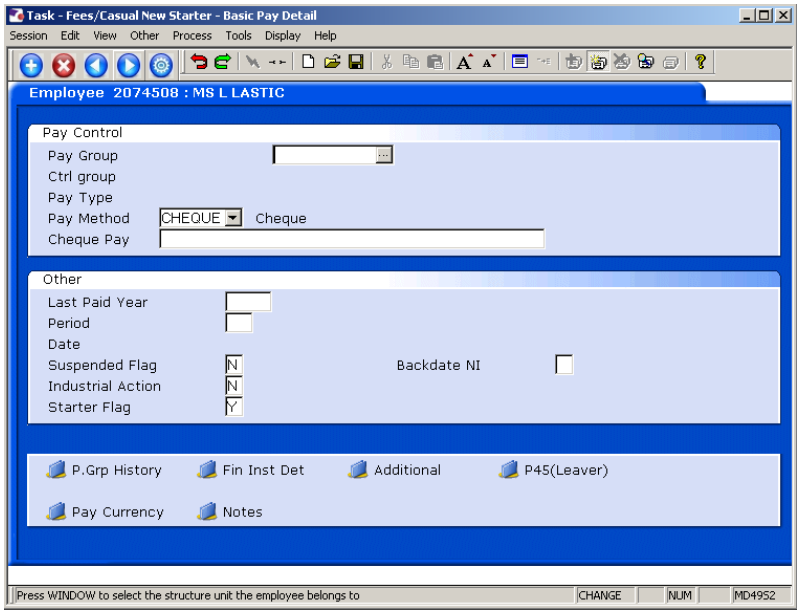
Enter the following information as appropriate (use the **Tab** key to move between fields):

- 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**.

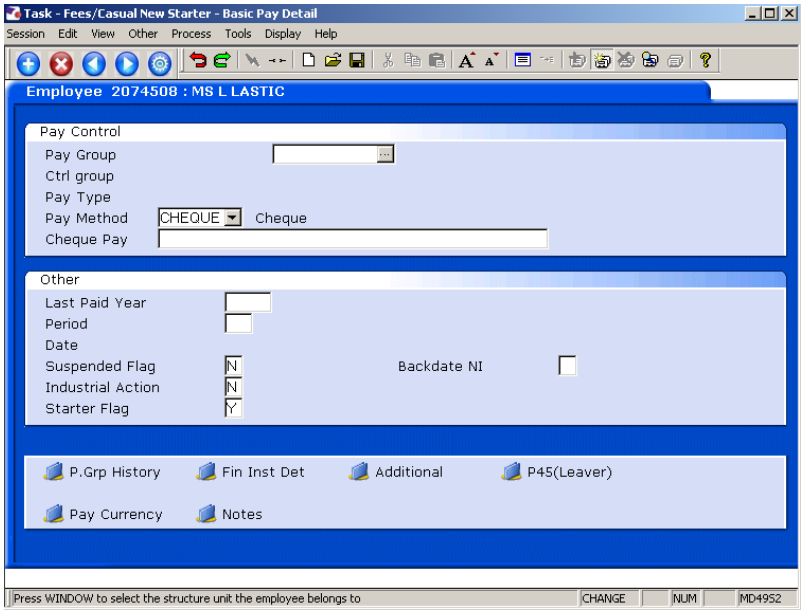
5.4 Enter the **Current Start** date and press **ENTER**.

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

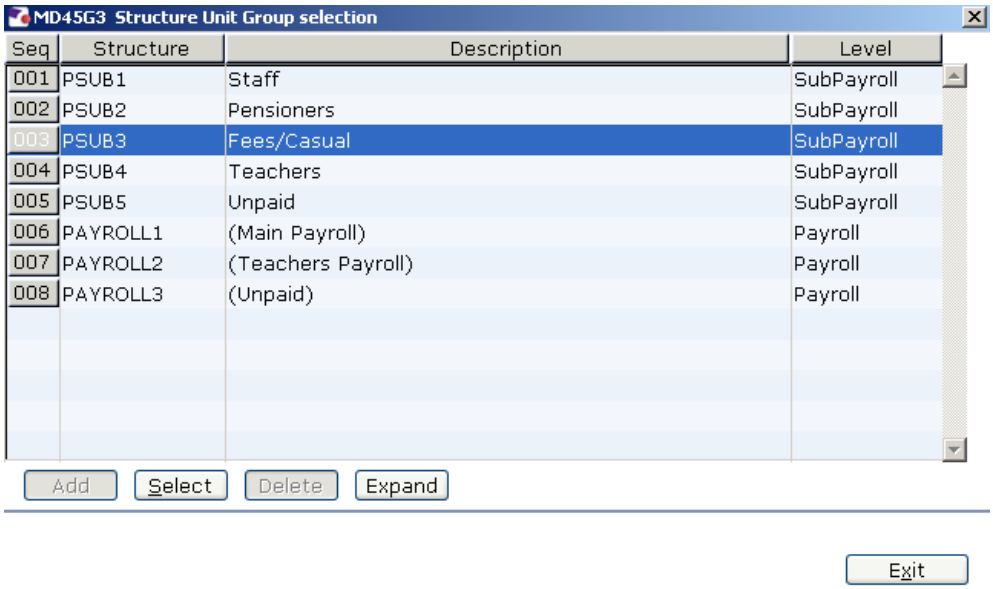
5.5 **Window in** to the next field and select the appropriate reason. This MUST be the same as previously entered

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

6 Basic Pay Details data entry screen

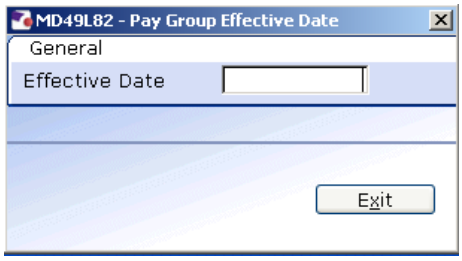


6.1 **Window in** to the **Pay Group** field.



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.

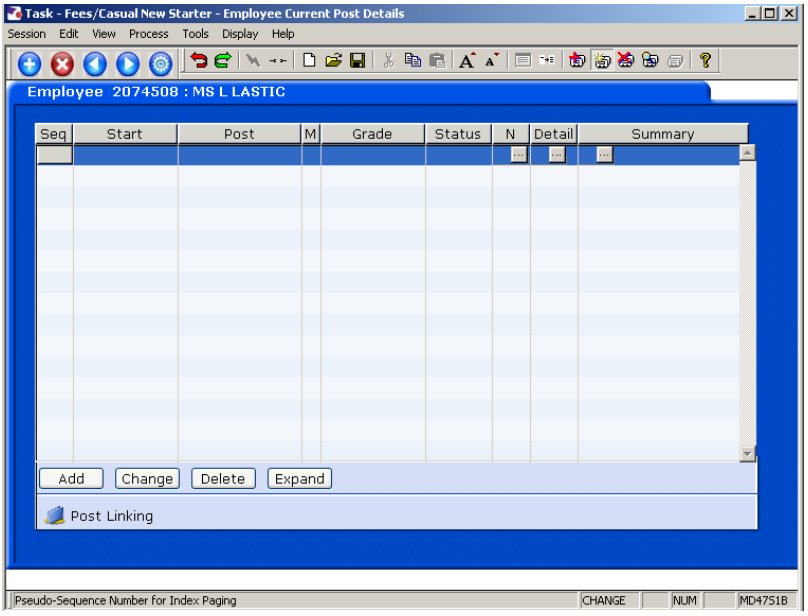
6.5 Leave the **Pay Method** as **CHEQUE**.

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.

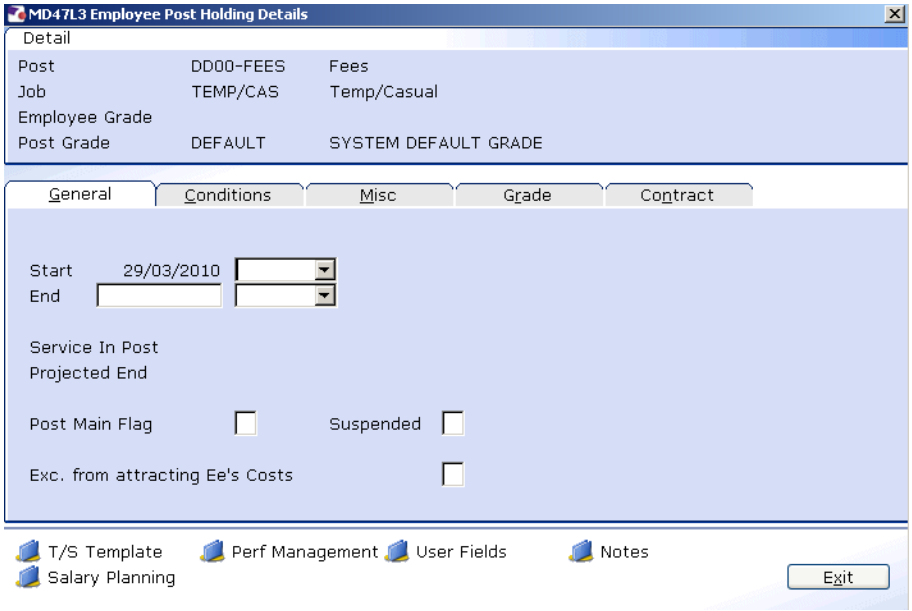
ⓘ The Fees/Casual posts will be at the bottom of the list of posts and will all be in the format “XXnn-FEES” (the first two letters refer to the school/ department – so “DD01-FEES” would be a Human Resources Temp Bank post, for example).

7.6 Select the relevant post.

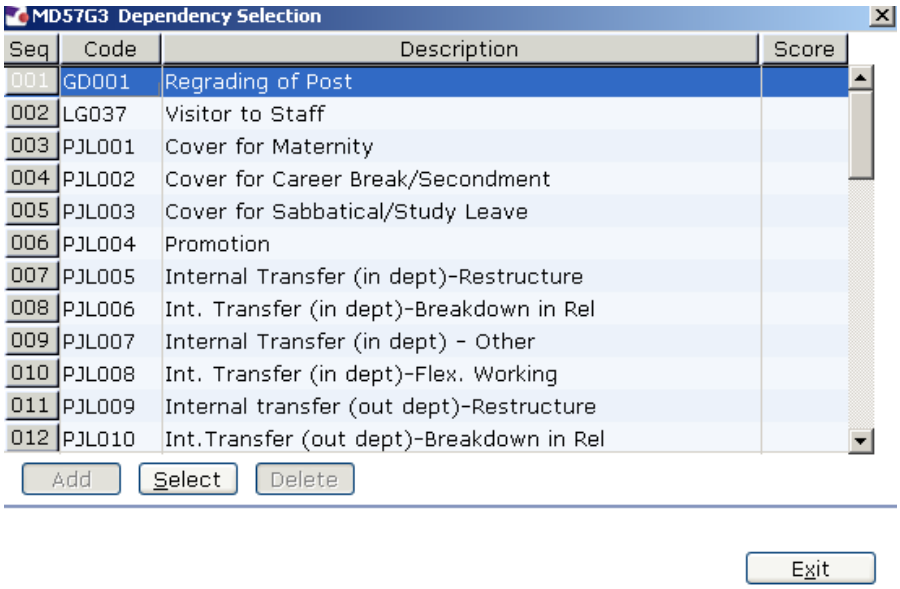
7.7 Press **ENTER**.

ⓘ 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**.



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:

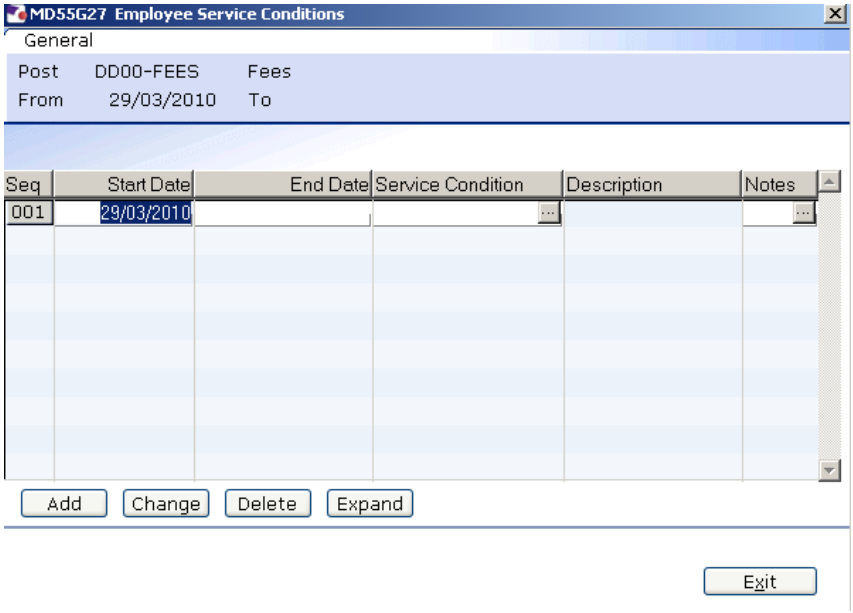


7.10 Select the appropriate reason for this New Starter. In most cases this will be **SG001- New Appointment.**

- 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.



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

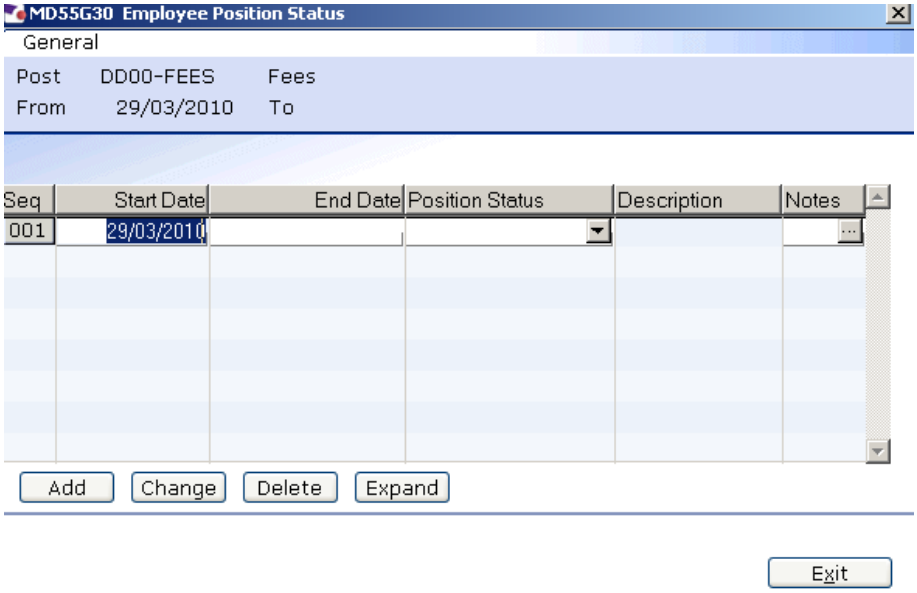
7.14 Click on **Add** and press **Enter** three times to pull through the Service Conditions.

7.15 The following warning dialogue box will appear:

Click **OK**.

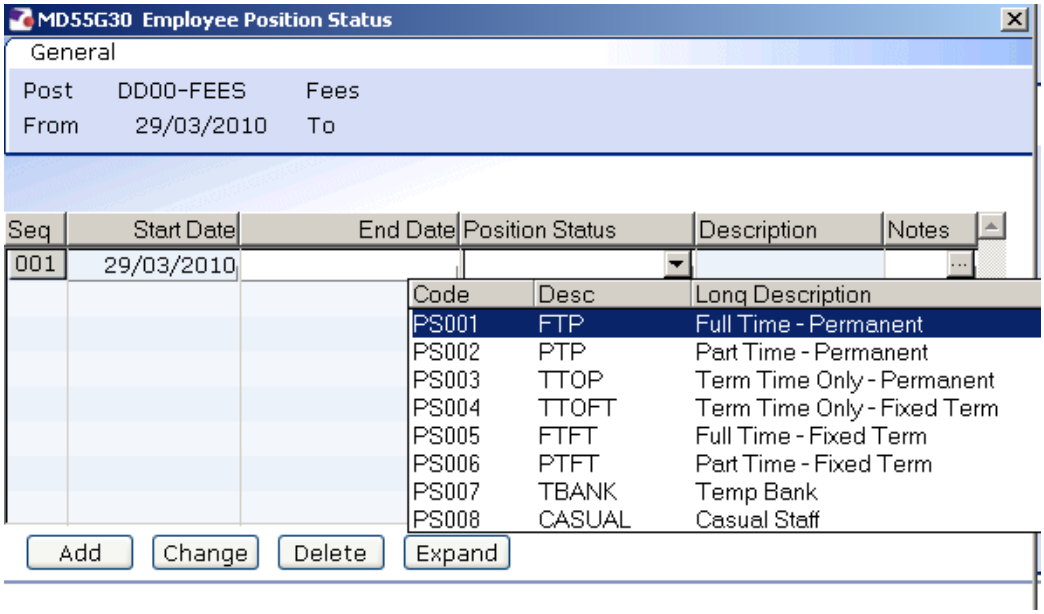
7.16 Click **Exit**.

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



7.18 Click on **Add**.

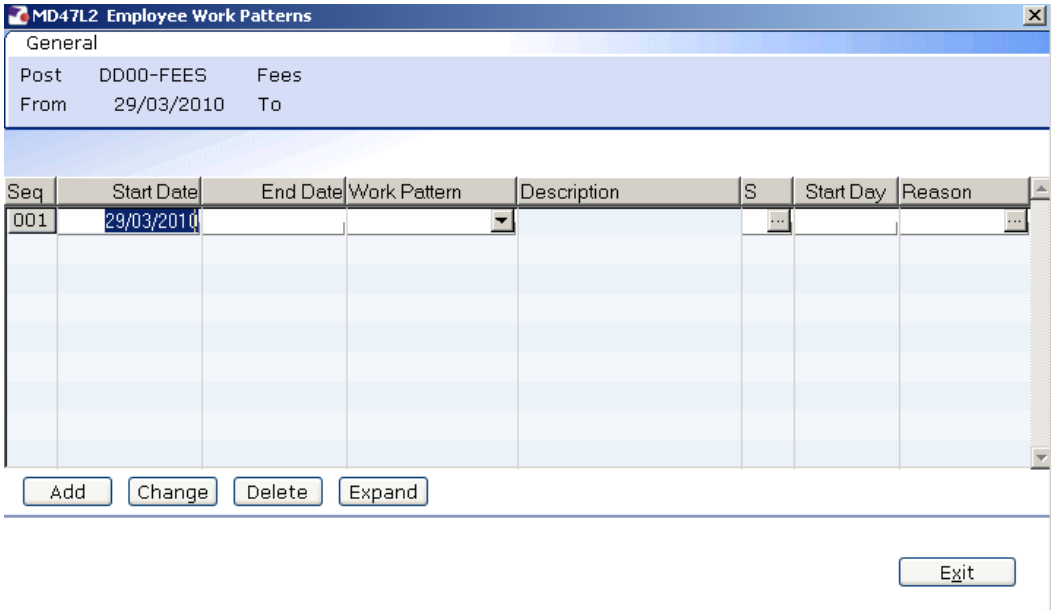
7.19 Press **Enter** twice to move to the **Position Status** field and display the drop down list.



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:



7.23 Click on **Add** and enter through the fields until you get to **Start Day**.

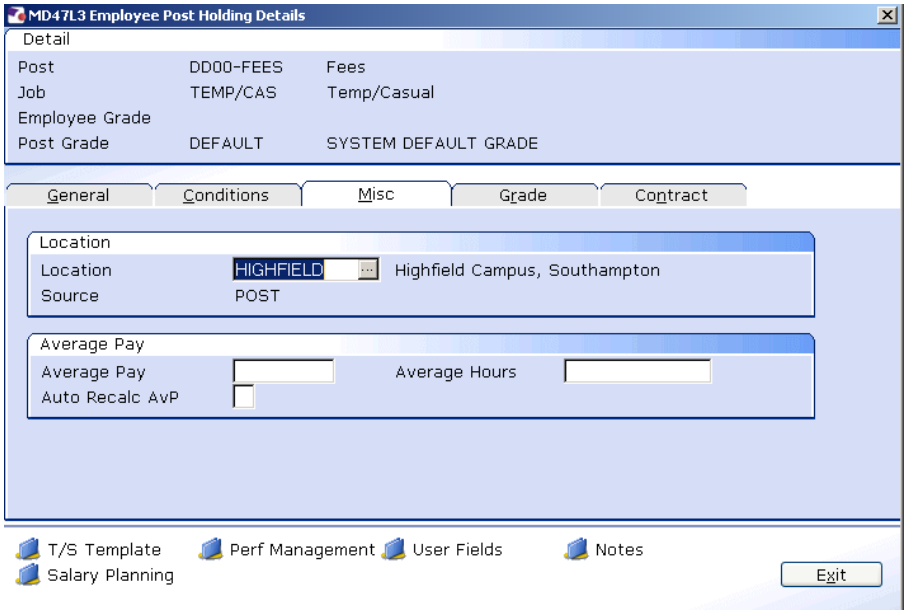
7.24 Enter the digit **"1"** into the **Start Day** field.

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

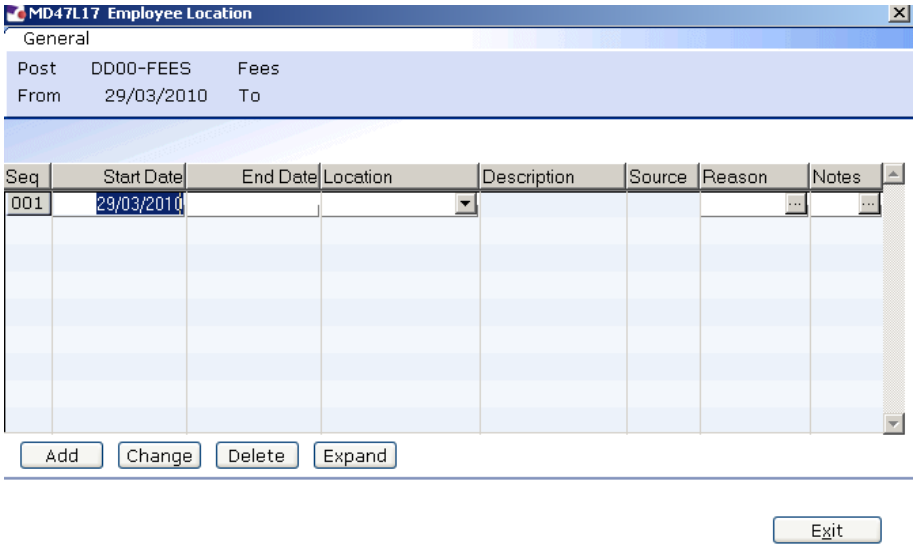
- The reason MUST be the same as was entered at instruction 5.2

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

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



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



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**.

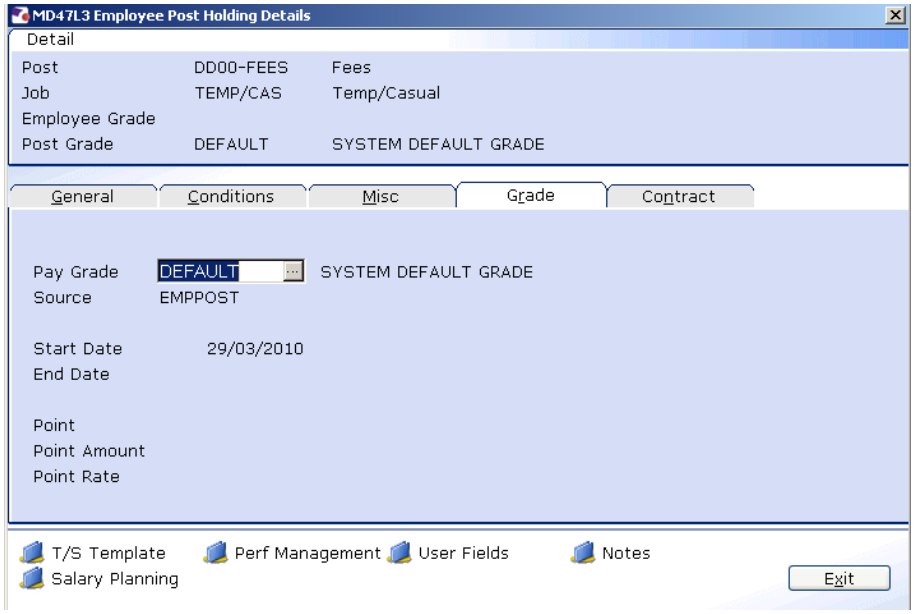
7.32 **Window in** to the **Reason** field and select the reason for the appointment.

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

7.33 Press **Enter**.

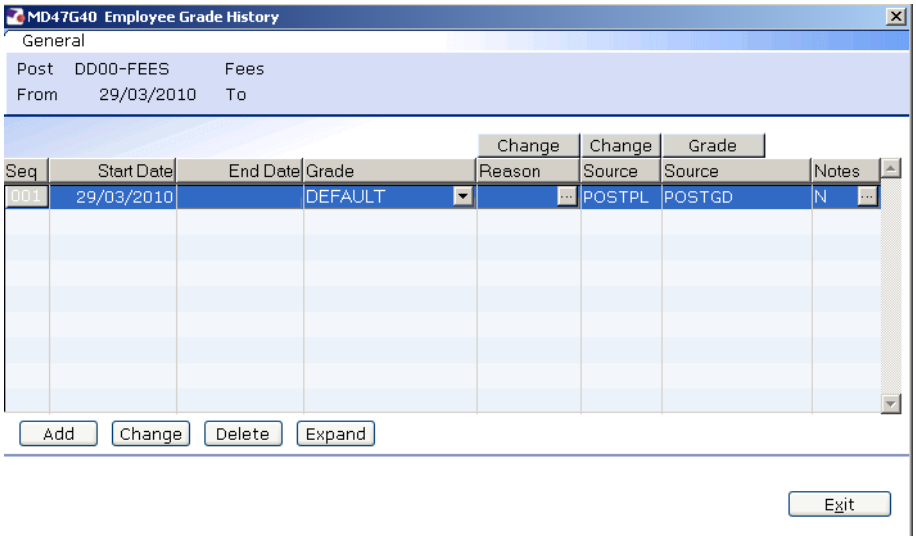
7.34 Click **Exit**.

7.35 Click on the **Grade** tab.



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

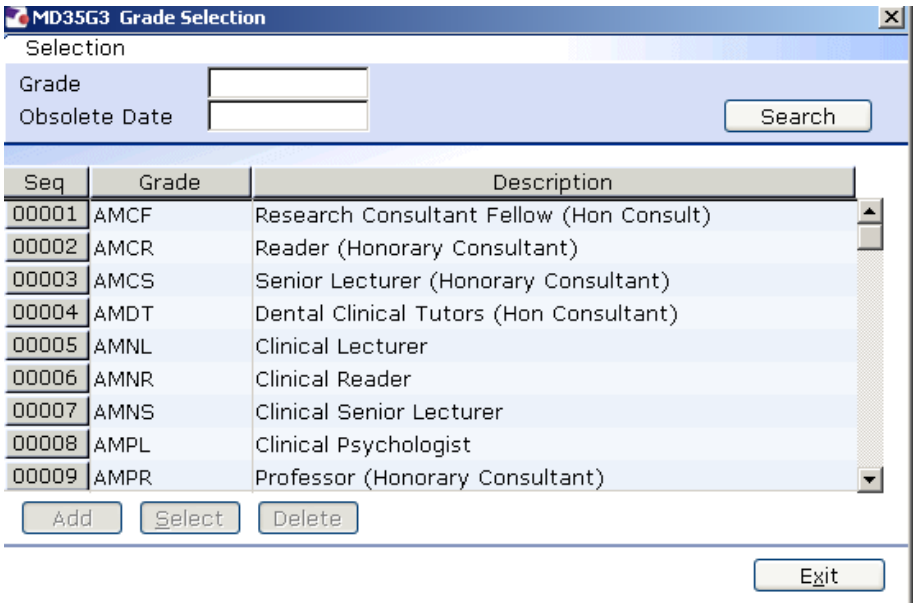
7.36 Window in to the **Pay Grade** field.



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.



7.40 Select the appropriate grade.

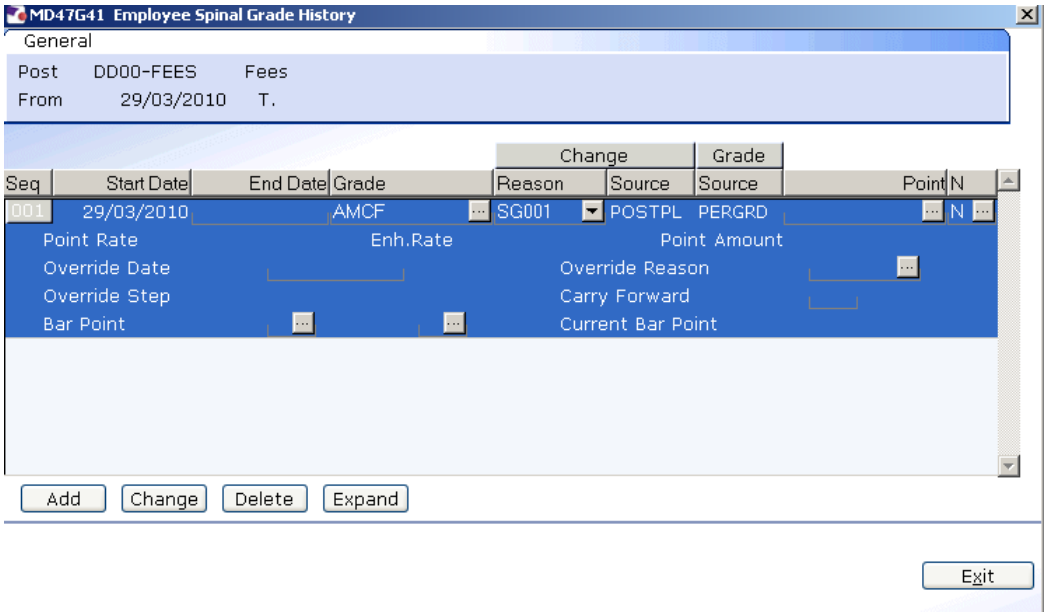
7.41 Press **ENTER** to move to the **Reason** field.

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

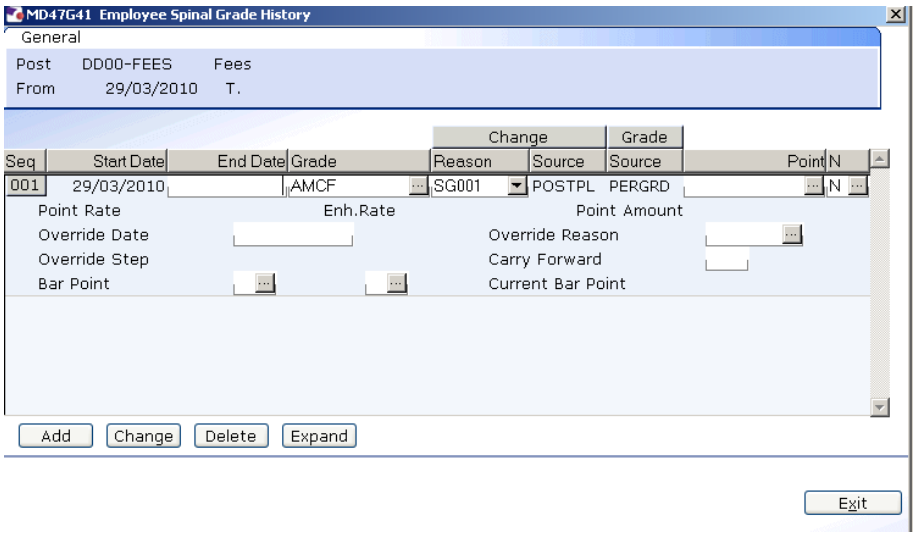
7.43 Click on **Exit**.

7.44 Window in to the **Pay Grade** field again.



7.45 Click on **Change**.

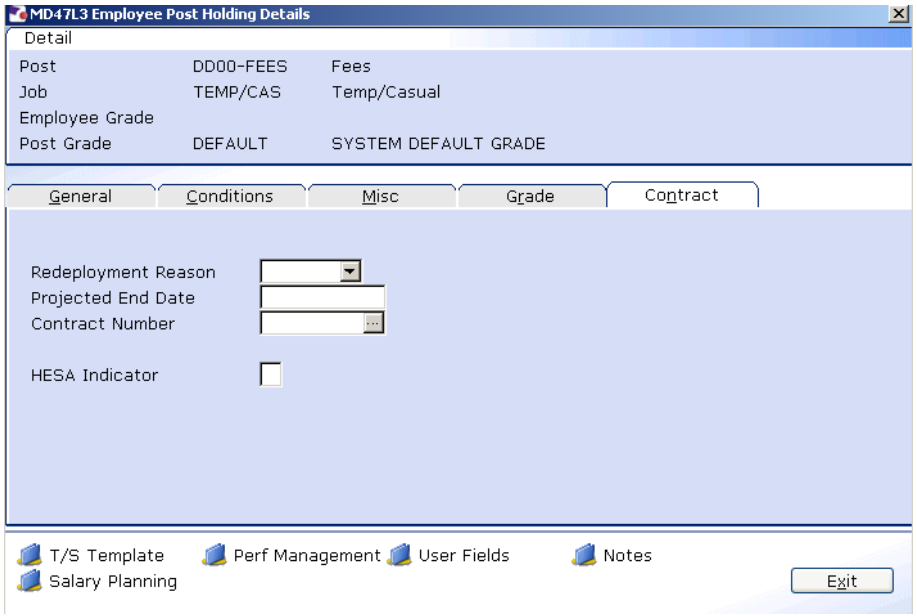
7.46 **Window in** to the **Point** field and select the Salary Point for this employee.



7.47 **ENTER** through the remaining fields.

7.48 Click on **Exit**.

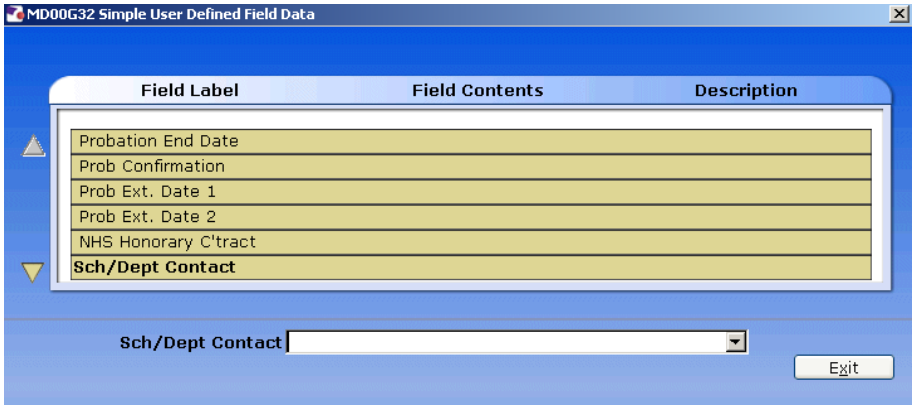
7.49 Click on the **Contract** tab.



ⓘ 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.



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**

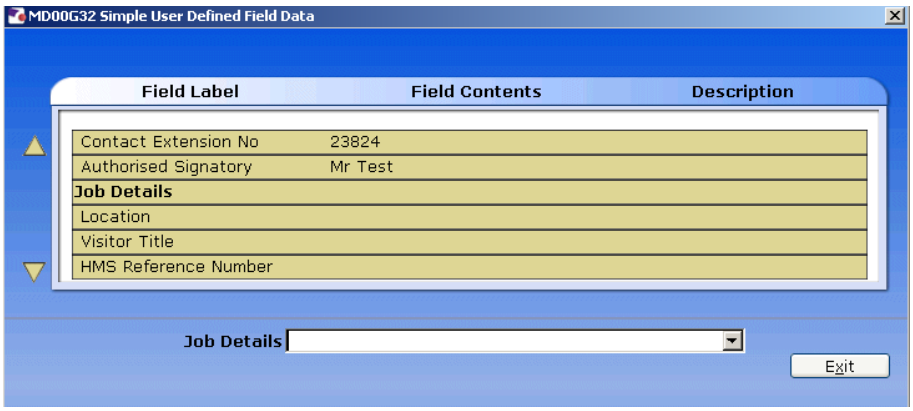
ⓘ This will automatically move to the **Contact Number** field

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



7.58 Click on **Exit**

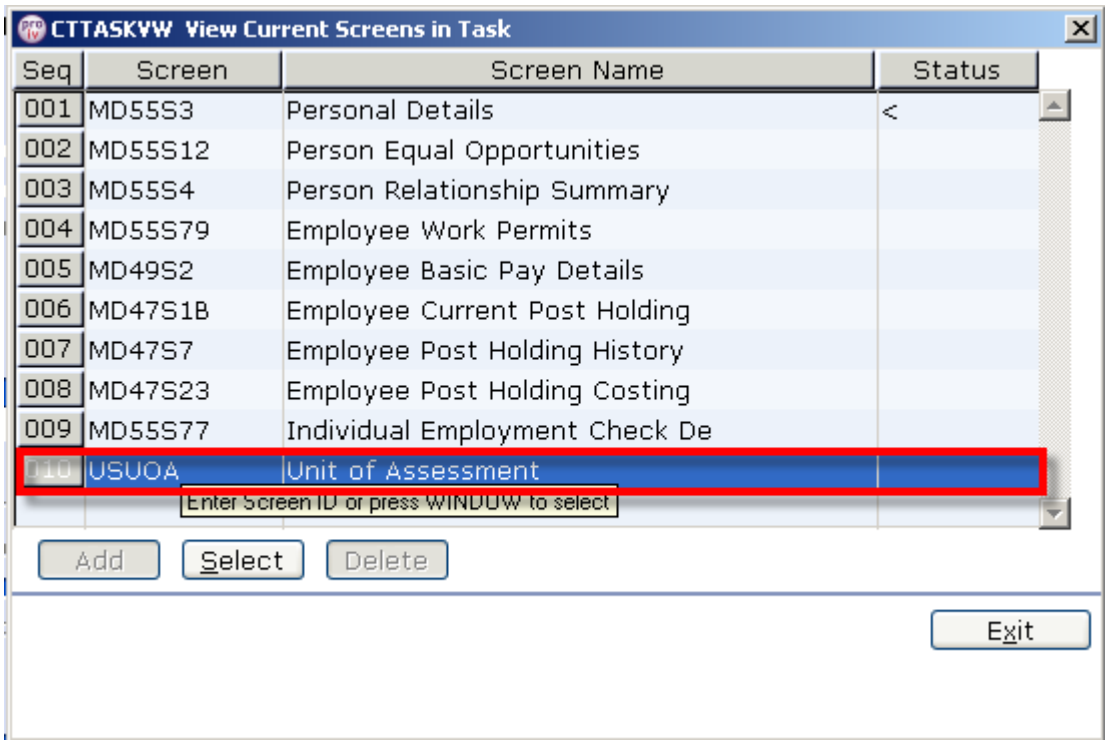
7.59 Press **ENTER** and click on **Exit**.

7.60 Click on to save the changes.

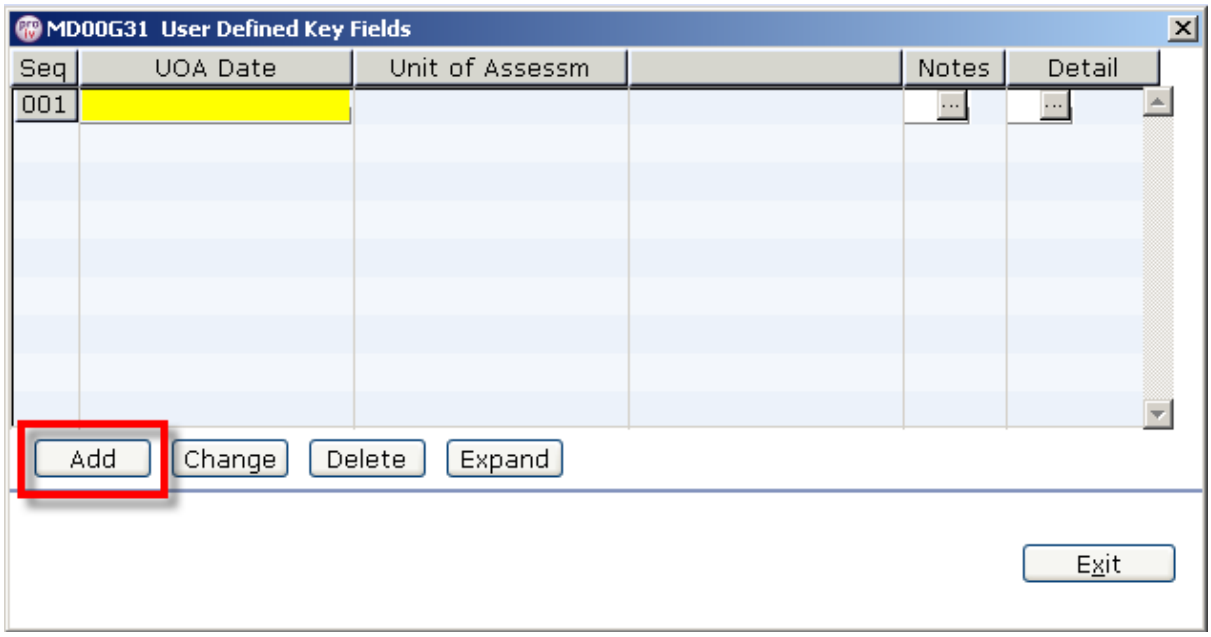
8 Unit of Assessment

8.1 Select to display the screens available within this Task.

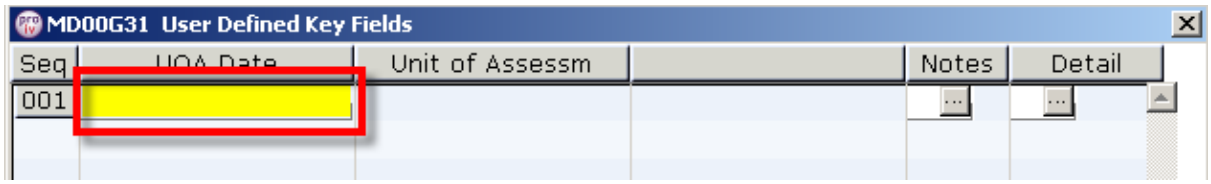
8.2 Click on Unit of Assessment and SELECT



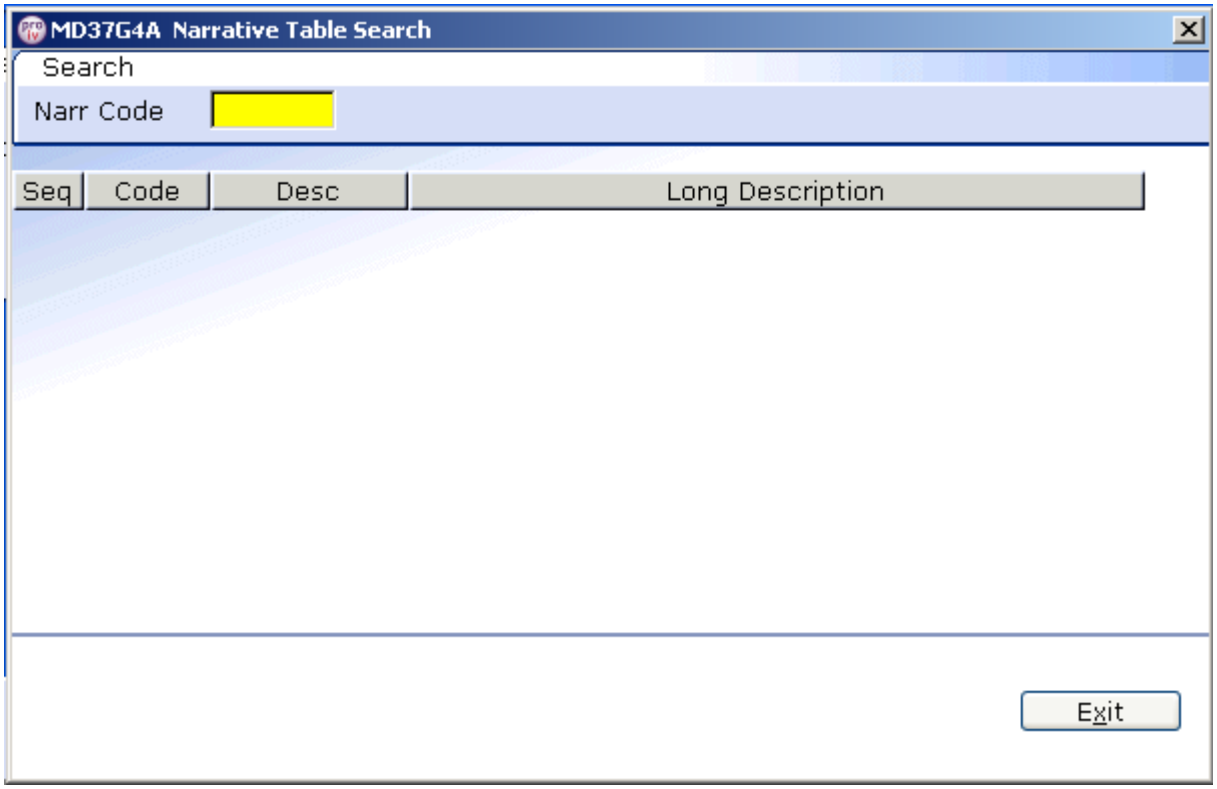
8.3 Click on **Add** to enter the UoA Date.



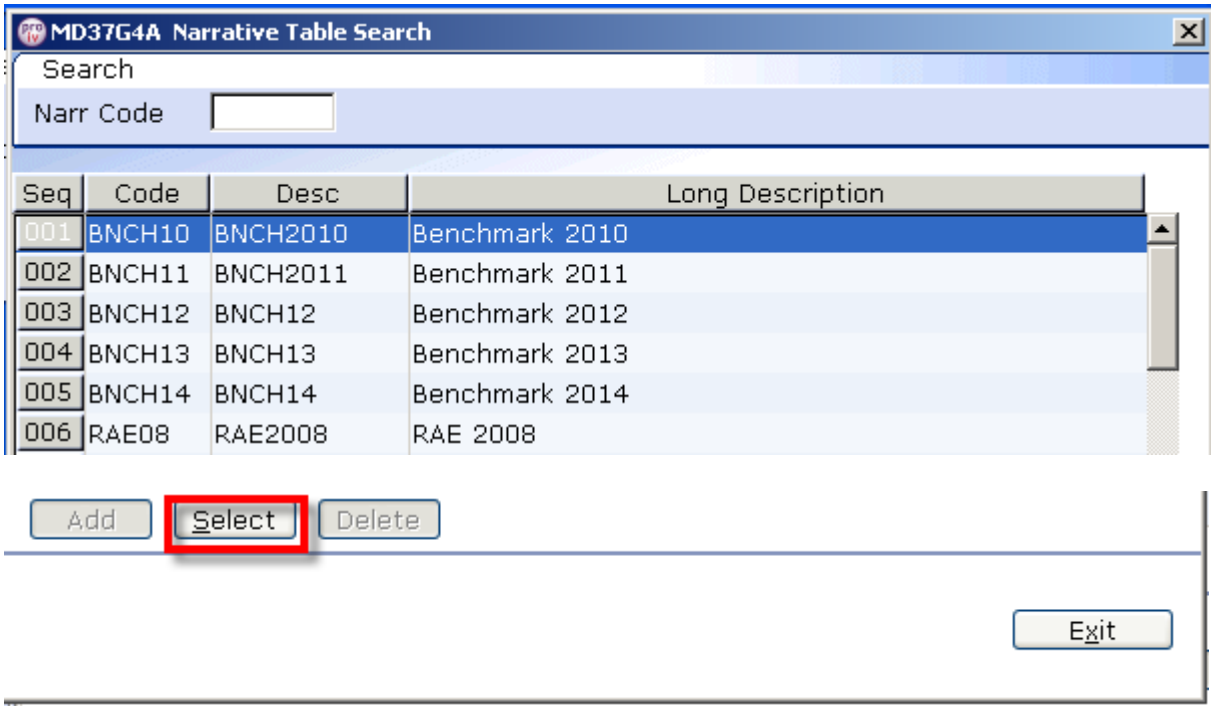
8.4 Double click in the UOA Date field



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

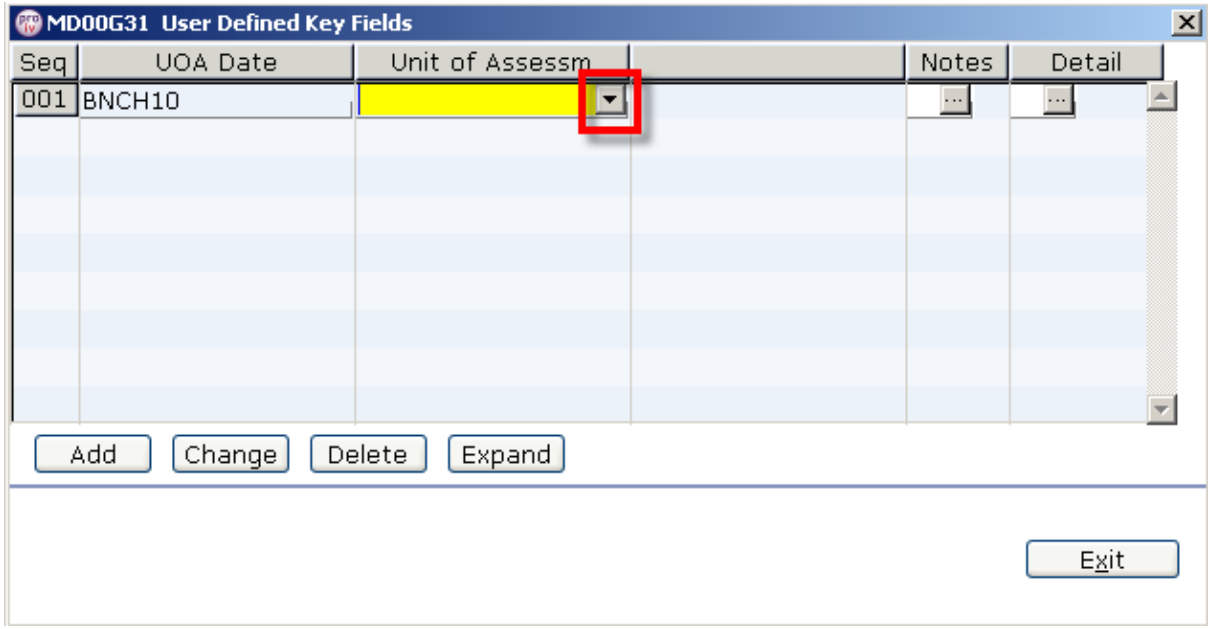


8.6 Click on the appropriate description and click **SELECT**

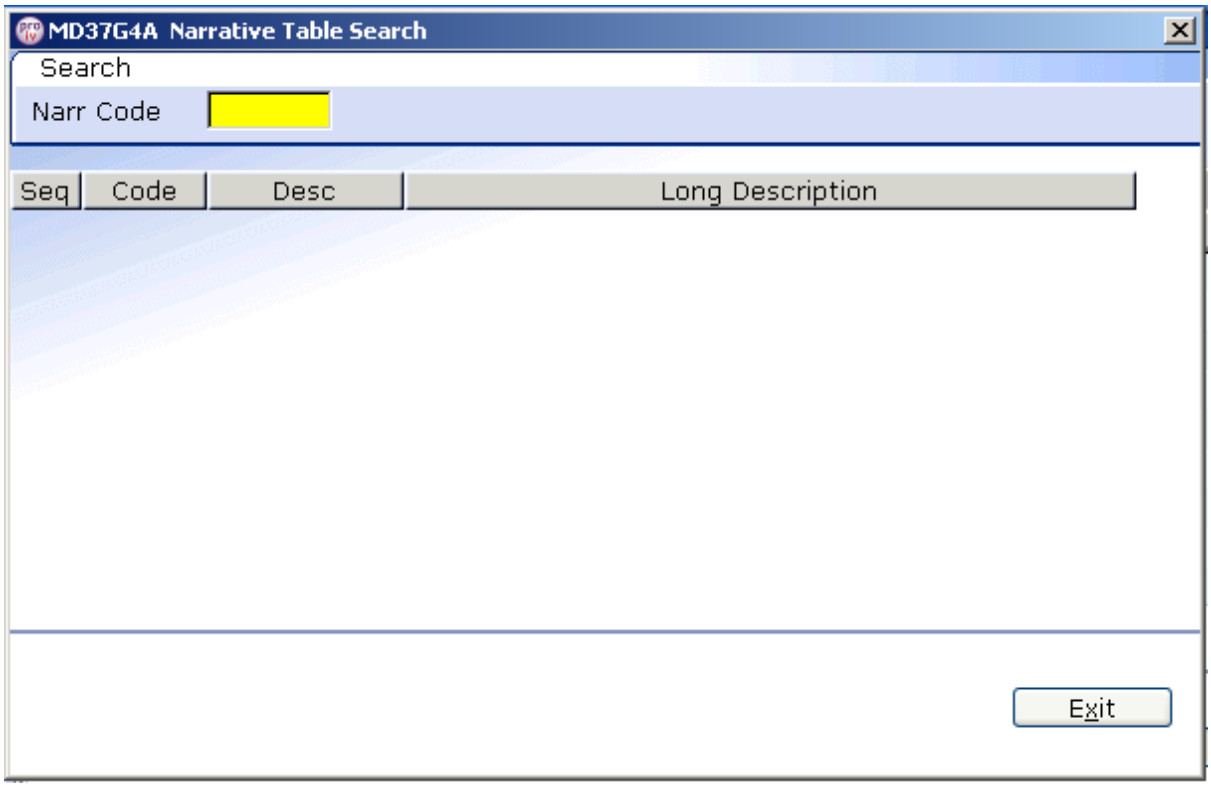


All Units of Assessments should be entered against UoA Date: Benchmark 2010 until advised otherwise by the HR Systems Team.

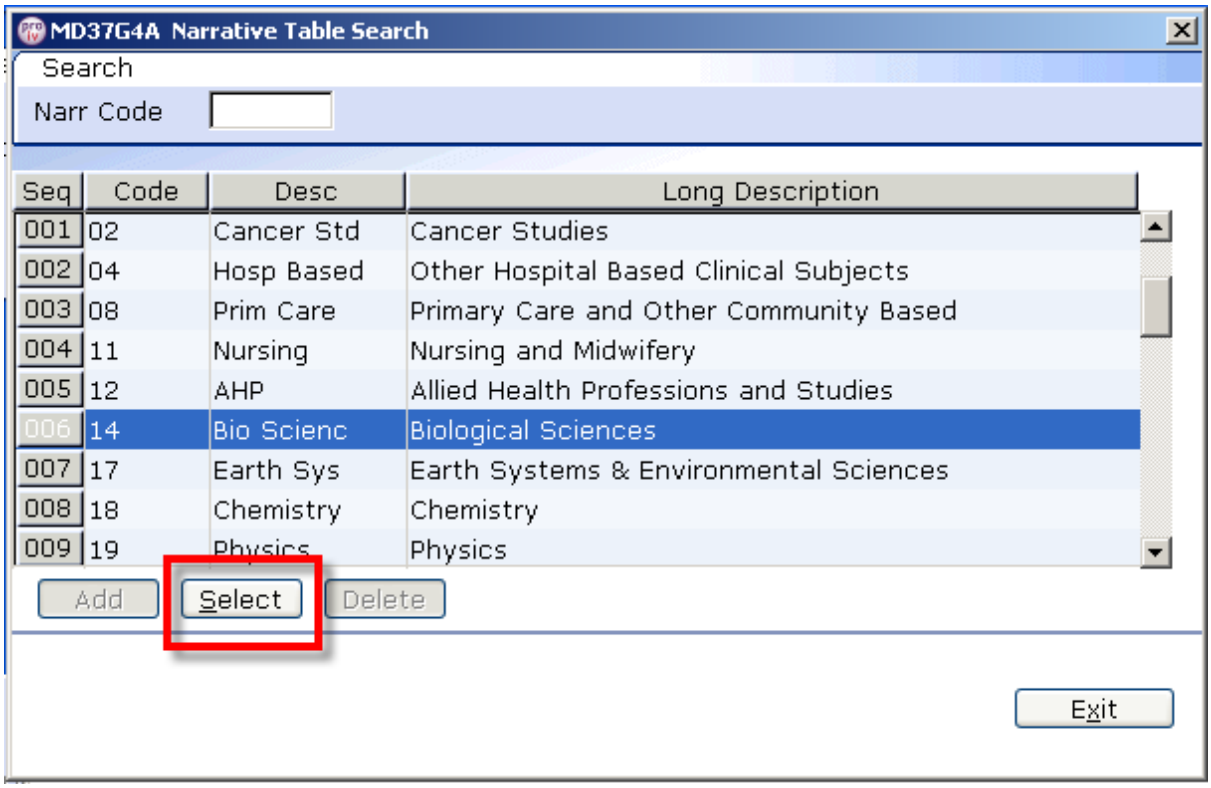
8.7 Within the Unit of Assessment field click on the drop down icon to display the data available for selection



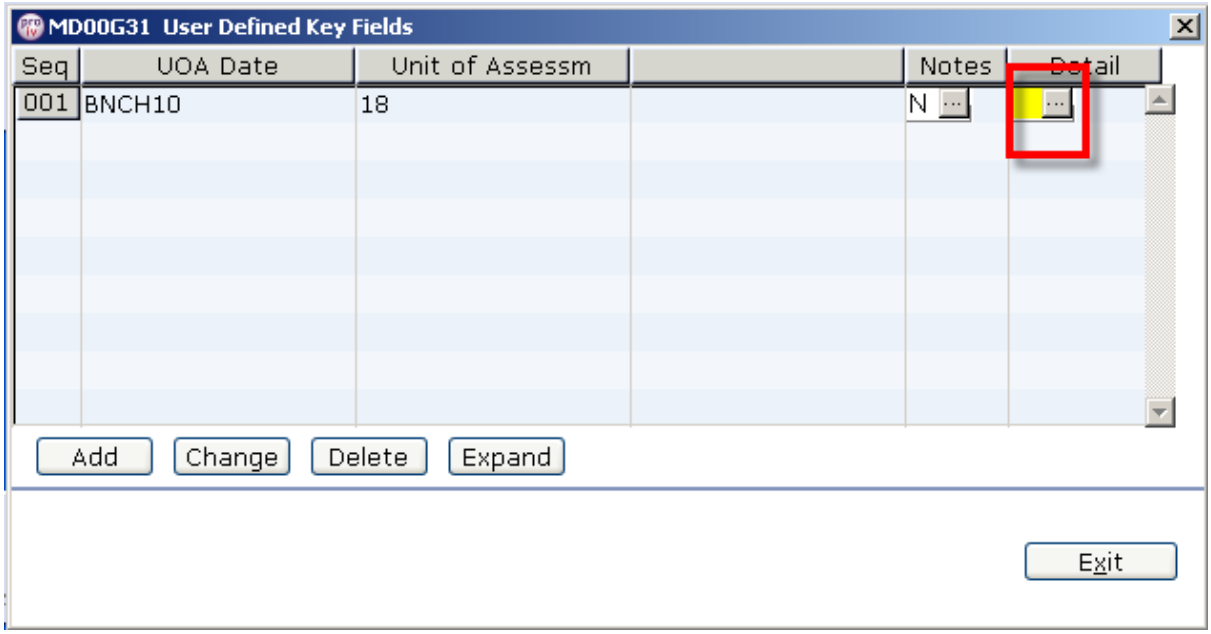
8.8 Press ENTER



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

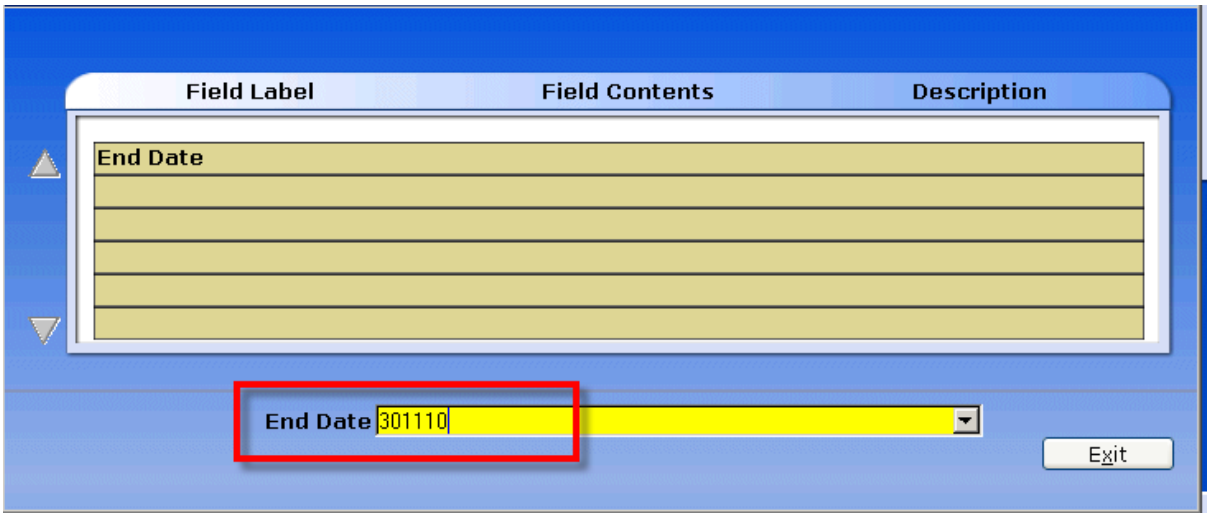


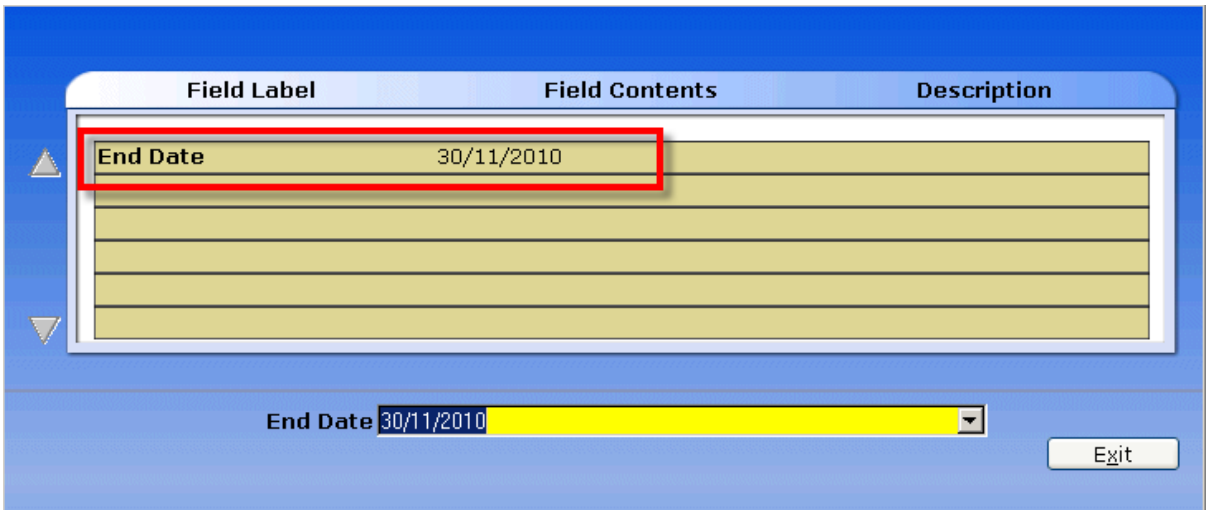
8.10 If known enter Unit of Assessment End Date by windowing in on the **DETAILS** field.



End Date details can be added at a later date

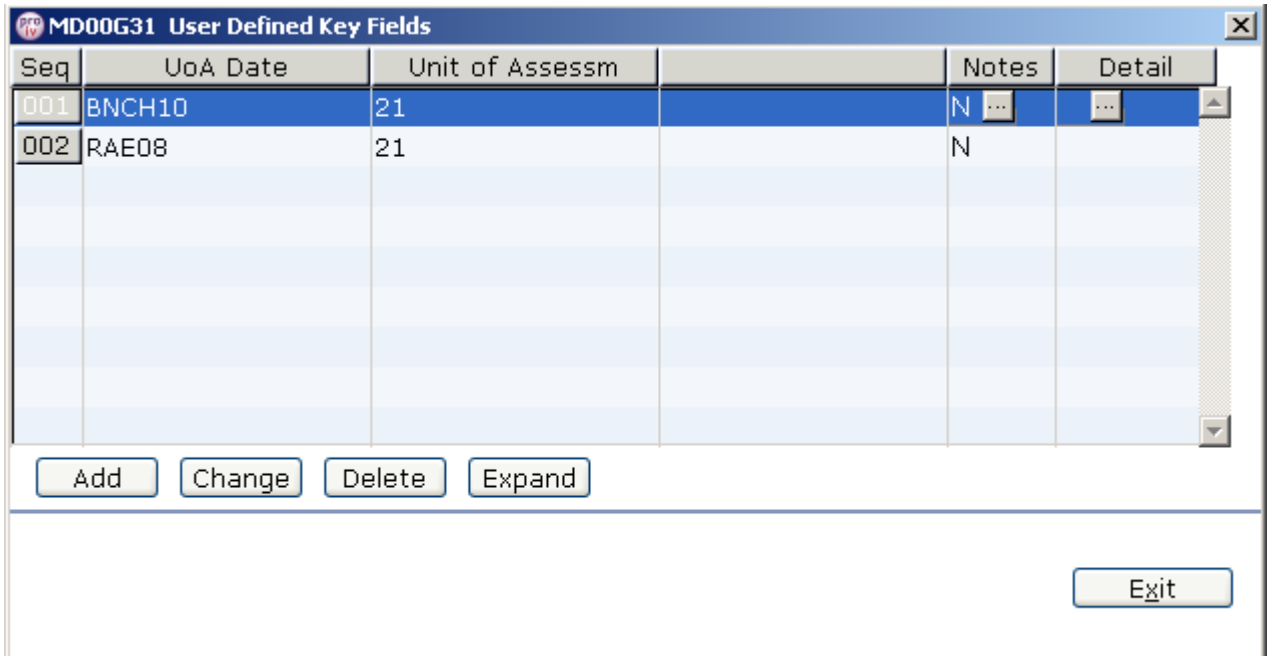
8.11 Type the End Date into the highlighted field and press **ENTER**





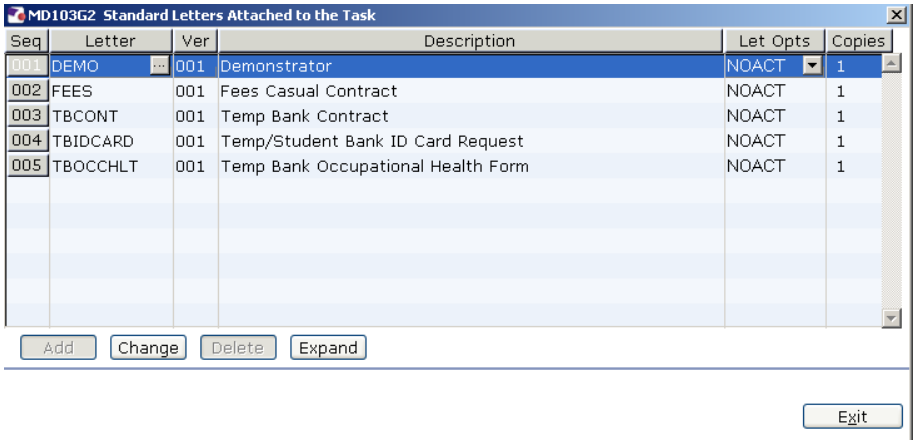
8.12 Click **Exit**.

8.13 Historical data will be maintained on this screen.



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

9 Standard letters



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.