This work instruction was last updated: 12th June 2012

HR New Starter Process

This Work Instruction describes the HR 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.

ⓘ If the person is an existing employee and they are to be assigned to an additional post (multiple contracts) you will need to enter them on the system using the **Multi-Post Starter** task.

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3	Equal Opportunities data entry screen
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17	Unit of Assessment
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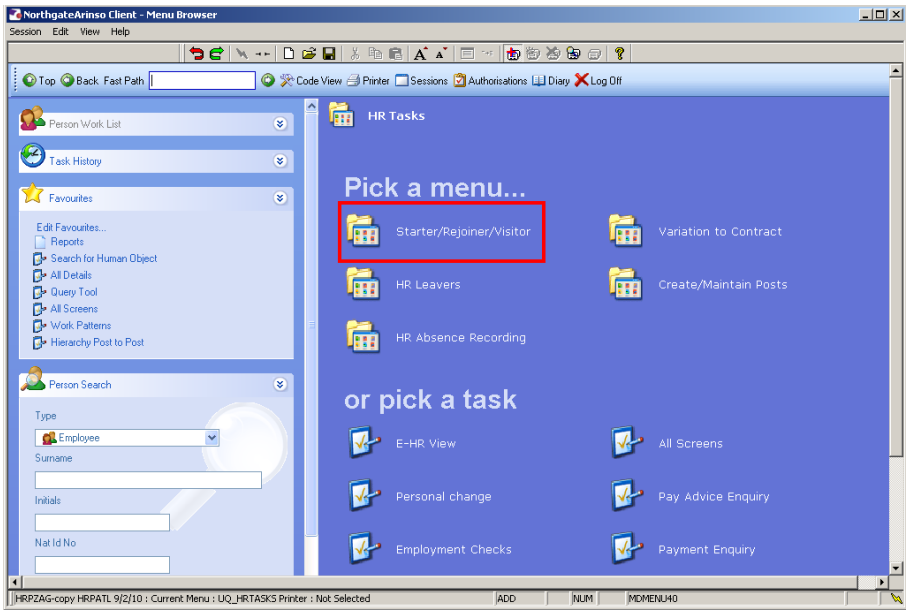
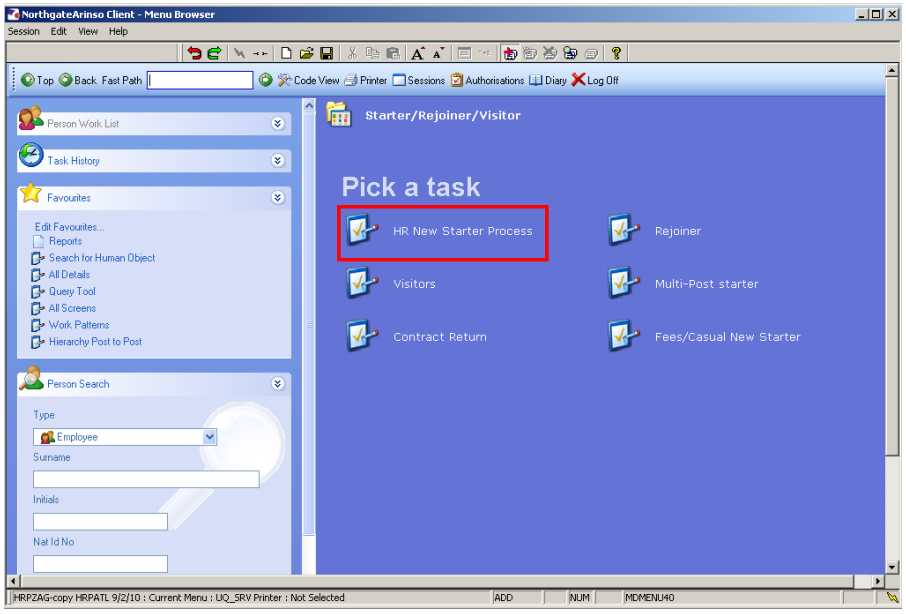
1 Setting up a New Starter

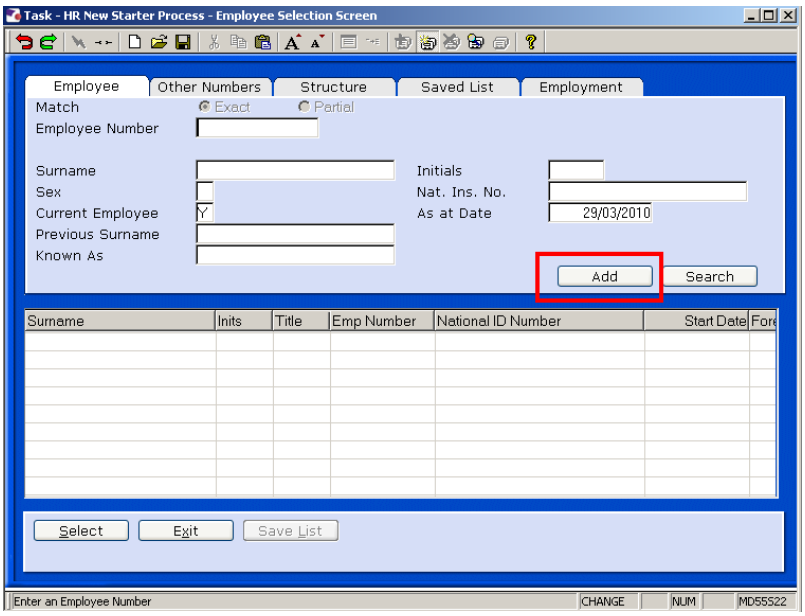
1.1 HR Tasks Select Starter/Rejoiner/Visitor



1.2 Select HR New Starter Process



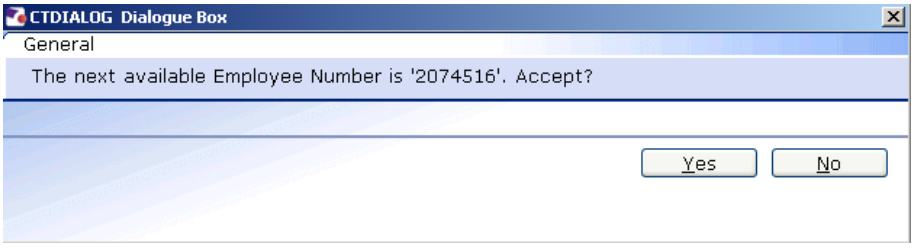
1.3 The Employee Selection Screen will be displayed.



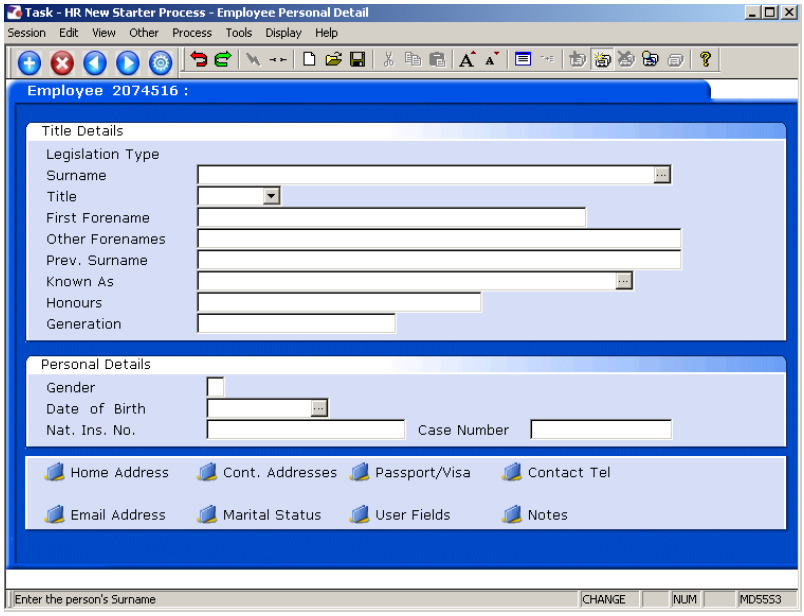
1.4 Select ADD

- **Provided that the system has been checked to ensure that the person does not have a record**

1.5 Accept the new number



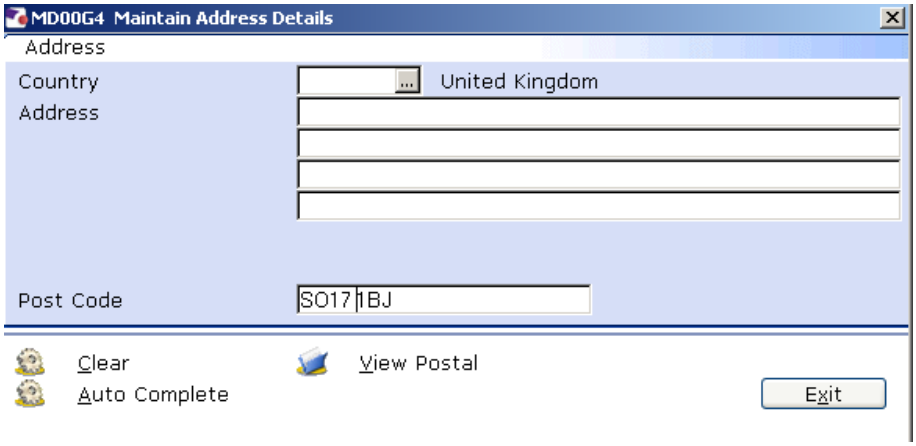
2 Personal Details data entry screen



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.

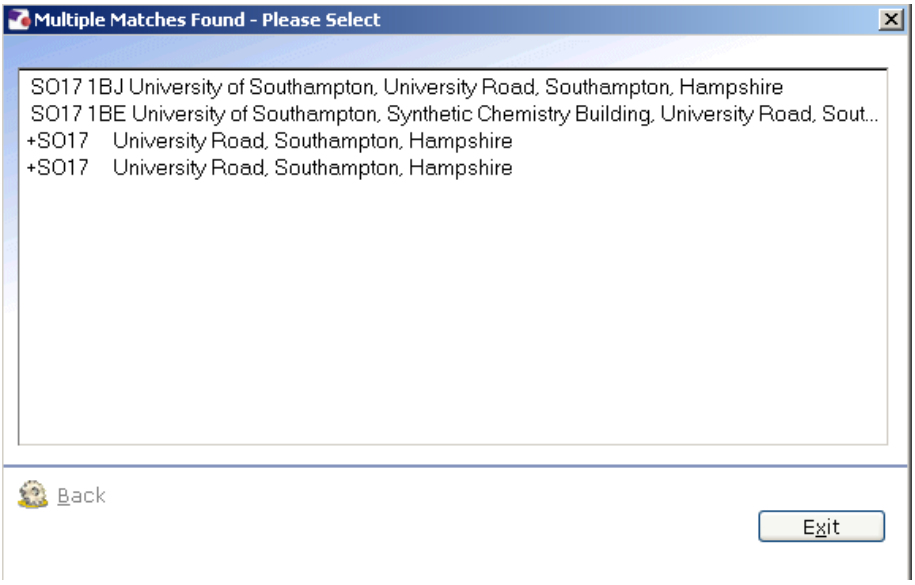
💣 Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.

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



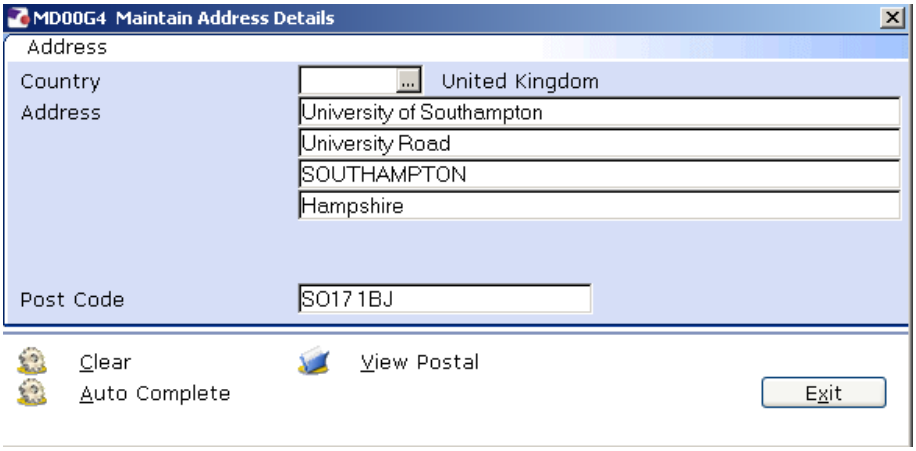
2.3 Enter the **Post Code** and press enter

2.4 Click on **Auto Complete**.



2.5 If given options Click on the correct address.

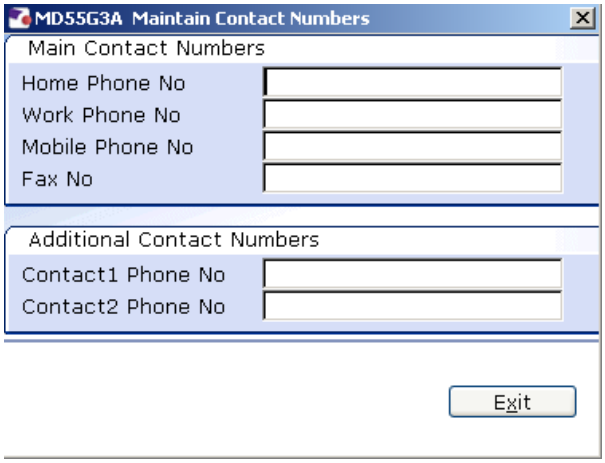
2.6 Click on **Exit**.



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

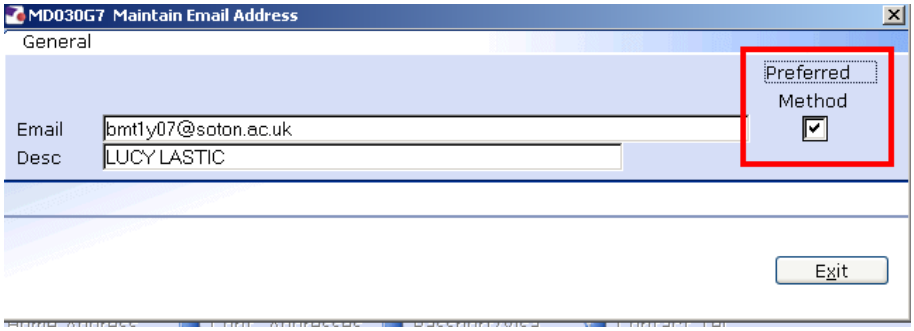
2.7 Click **Exit**.

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 employee's email address (this should be a University of Southampton email address).

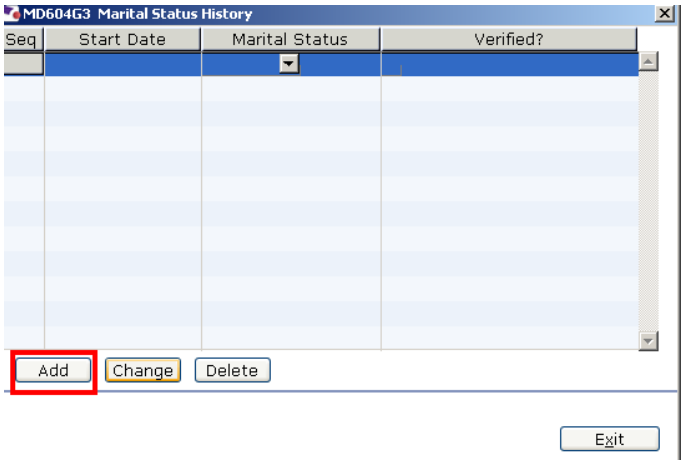


2.11 Ensure that the **Preferred Method** box is ticket, otherwise system generated emails (relating to MyView, for example) will not be sent.

2.12 Click on **Exit**.

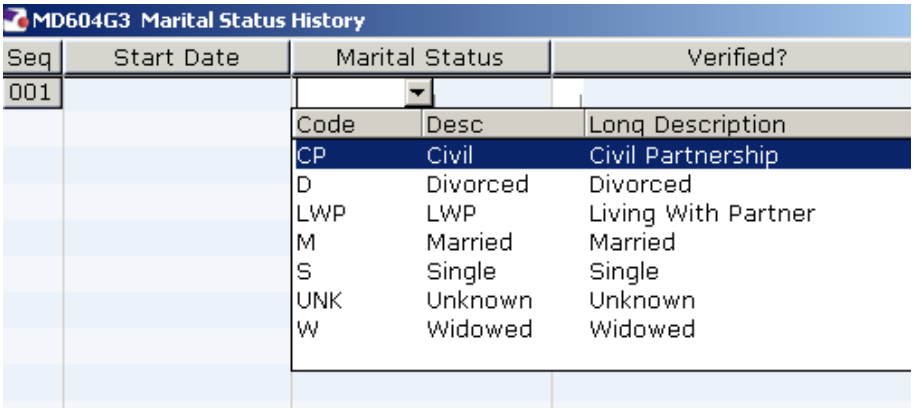
2.13 Click on **Marital Status** to enter the relevant information.

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



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

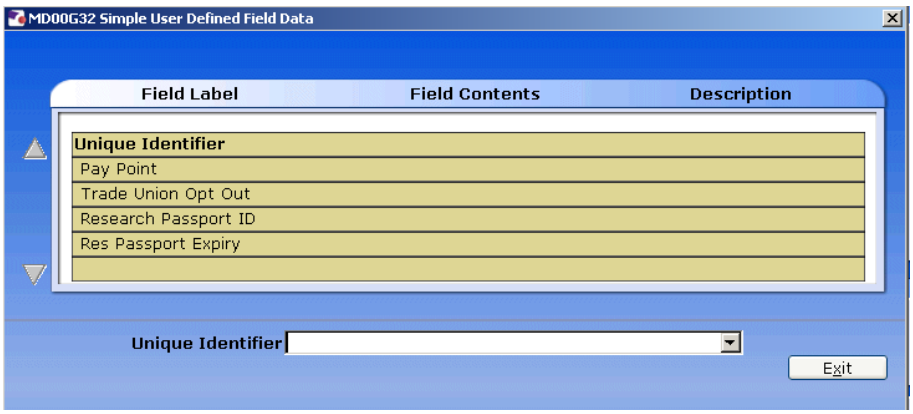
2.16 Click on the drop down and select the **Marital Status**.



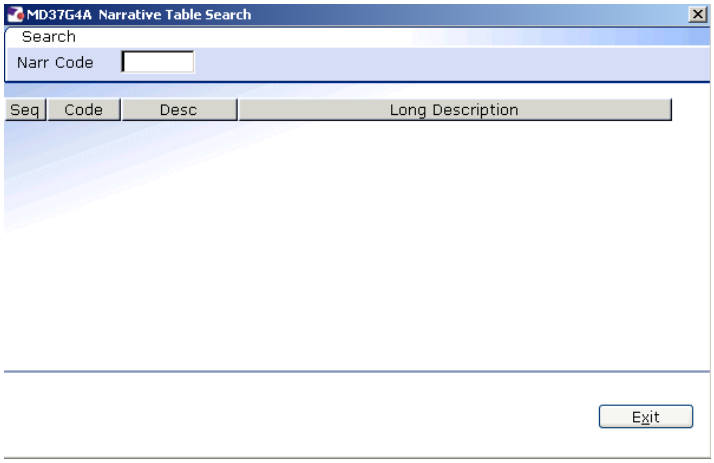
2.17 If the marital status has been verified, enter a **Y** in the **Verified** field.

2.18 Click **Exit**.

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



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

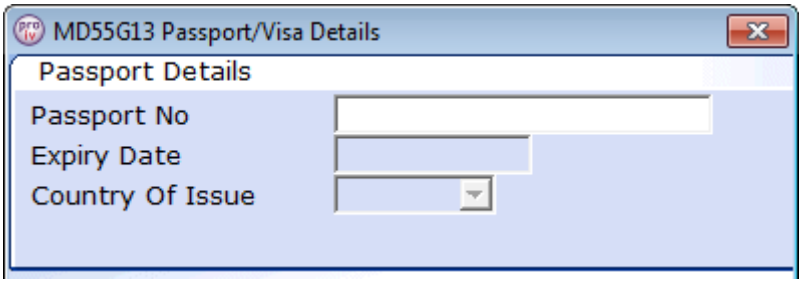


2.21 Press the **ENTER** key to display the list of available **Pay Points**.

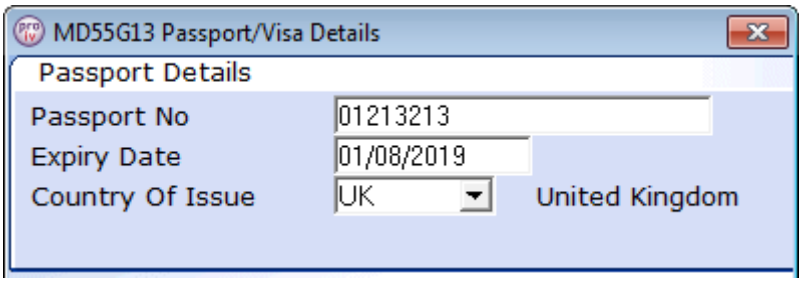
2.22 Click on the required **Pay Point** and then click on **Exit**.

2.23 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.



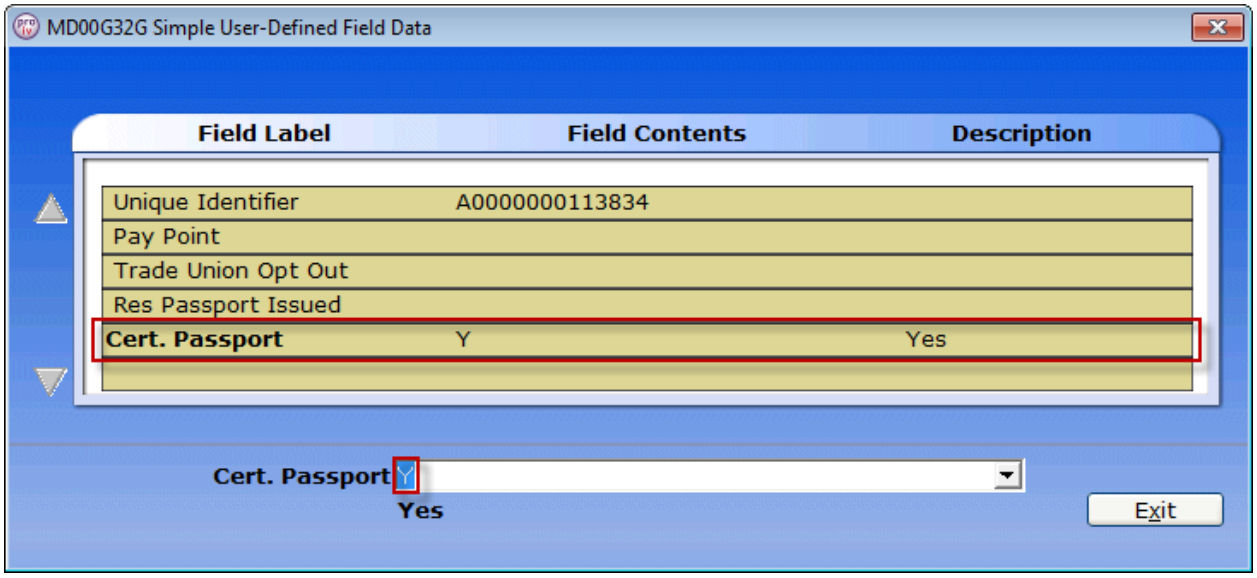
2.24 Complete the 3 fields.



2.25 Once the details have been added, click on Exit (at the bottom).

2.26 Click onto User Fields

2.27 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.

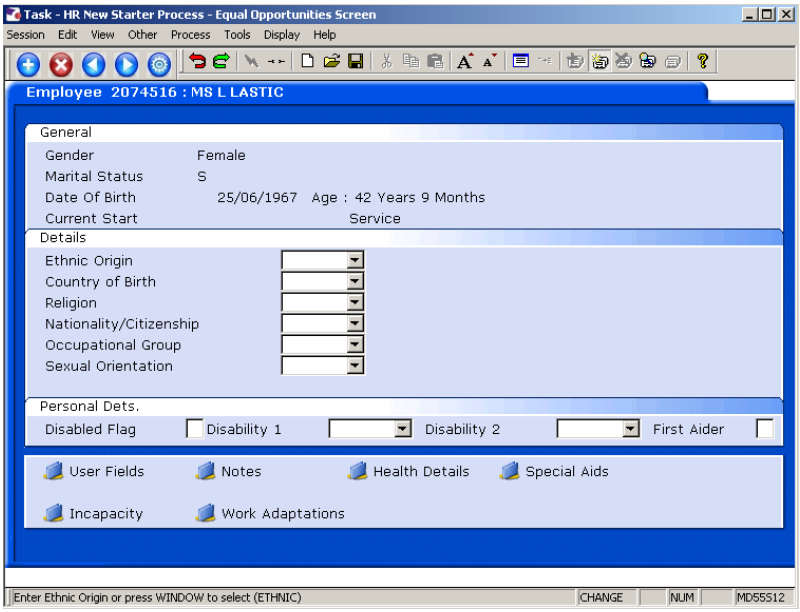


2.28 Press enter for it to accept the Y and then click on Exit.

2.29

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

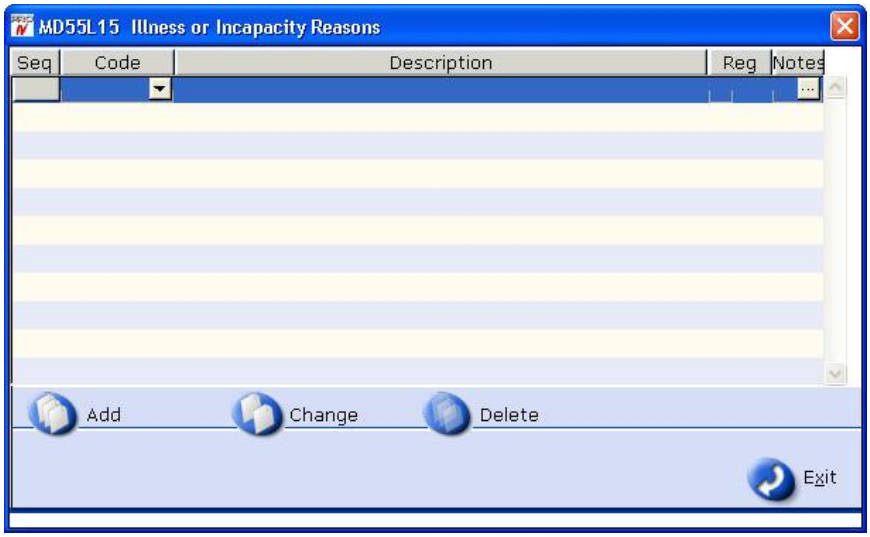
3 Equal Opportunities data entry screen



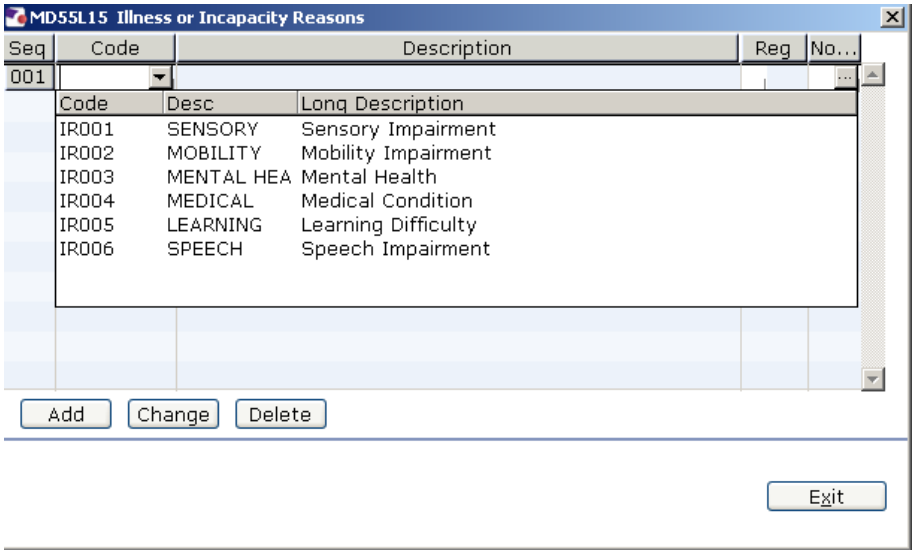
3.1 Complete the following fields only:

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.



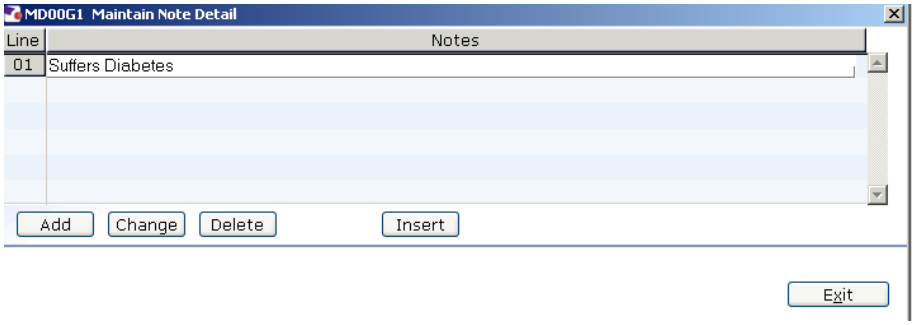
3.4 Click on the drop down arrow in the **Code** field to display a list of incapacity reasons.

3.5 Select the appropriate incapacity reason.

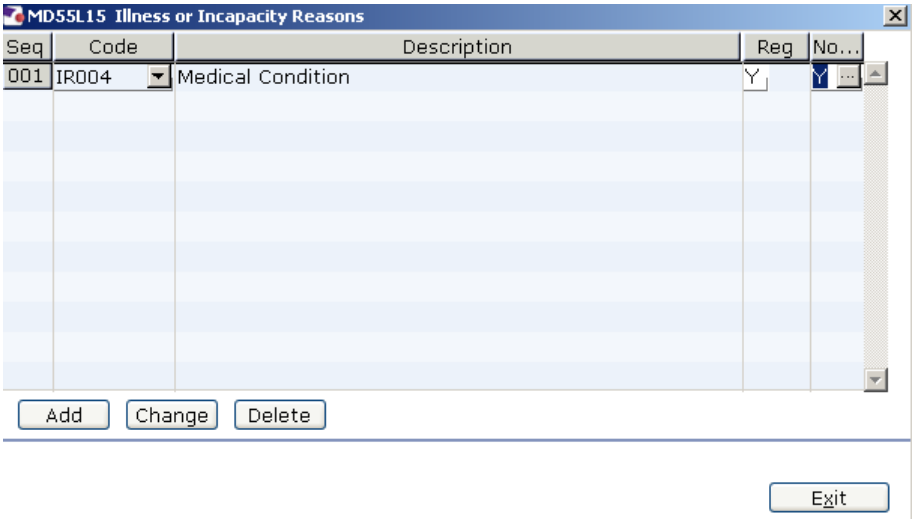
3.6 The Description will appear as you **ENTER** through the fields.

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

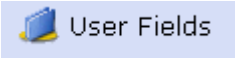
💣 Only window into the **Notes** field if you need to record conditions that school managers would need to be aware of. i.e. Diabetes.



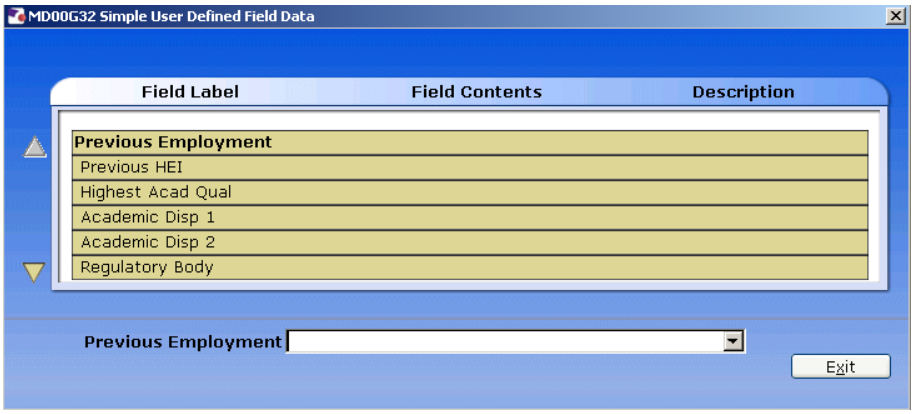
3.8 Click **Exit**.



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

3.10 Click on 

to complete **HESA information.**

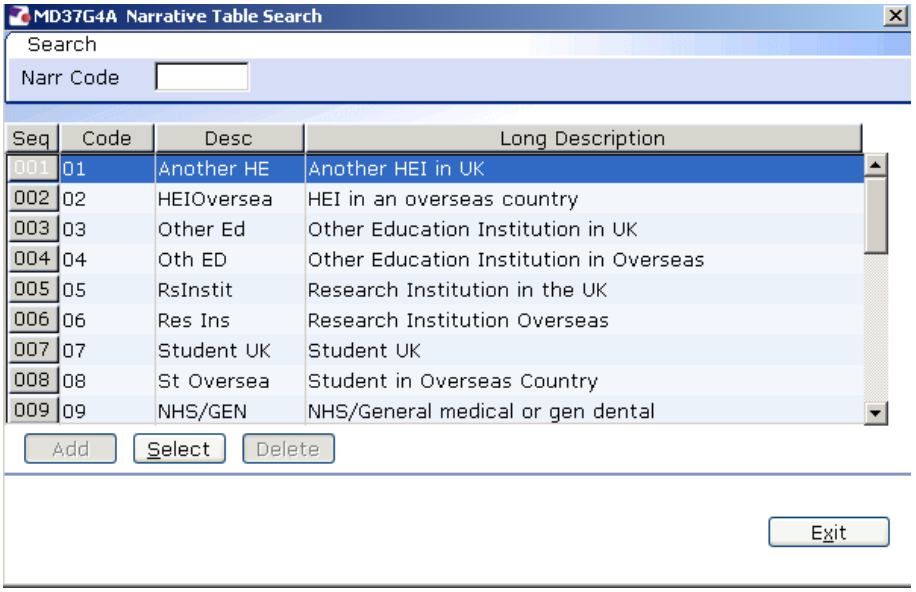


3.11 In **Date 1st App CurrHEI** – This date is taken from the 'Employment details' screen. To find this, exit out of User Defined fields and go to the 'Employment details' tab. Copy the Current start date across from here into the 'Date First App HEI'.

💣 Please note, if there is a date in the 'To Staff' field then this will override the date in 'Current Start date', so in this instance use this one.

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

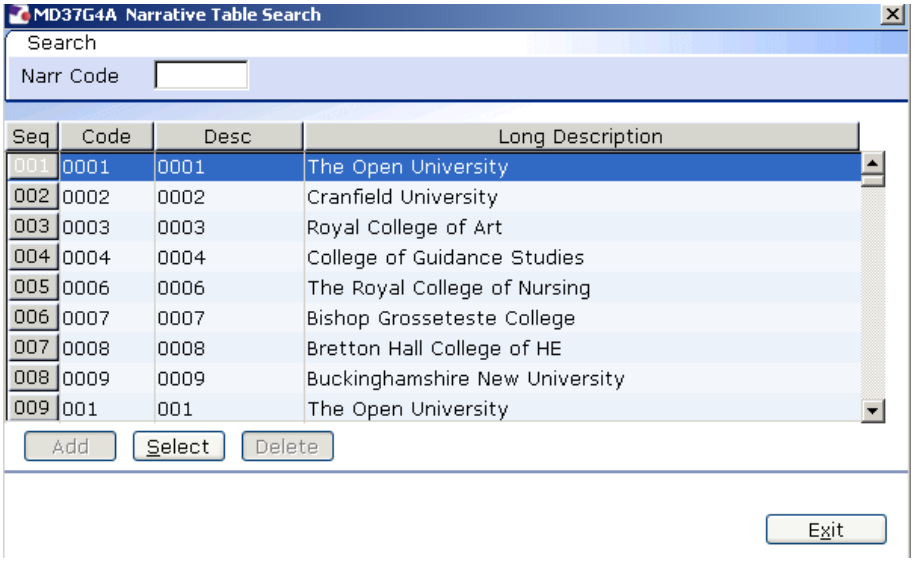
3.13 Press **Enter.**



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

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

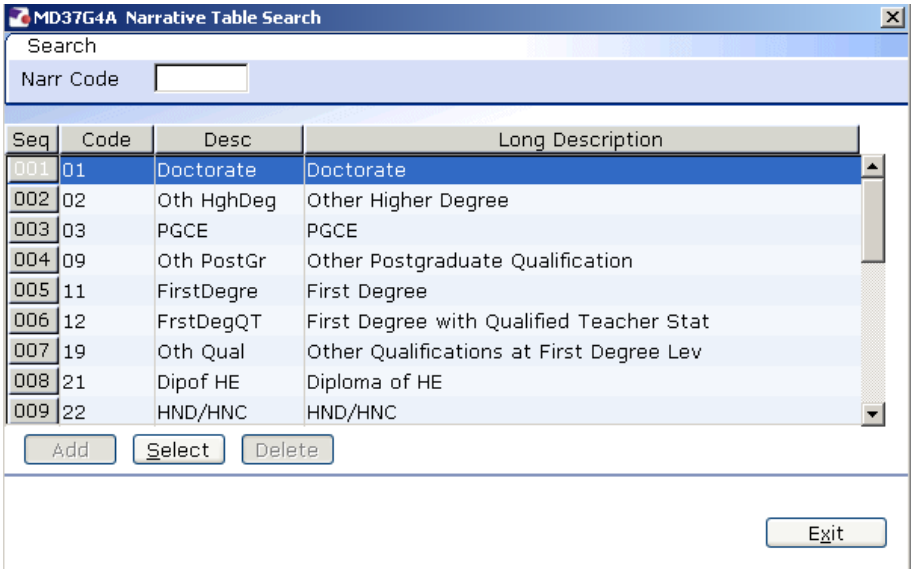
3.16 Press **Enter.**



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

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

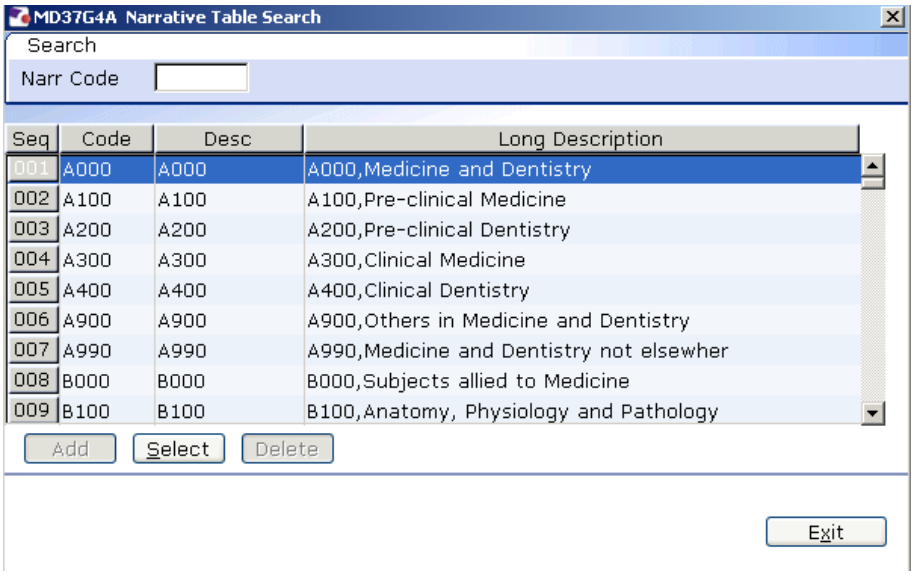
3.19 Press **Enter.**



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

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

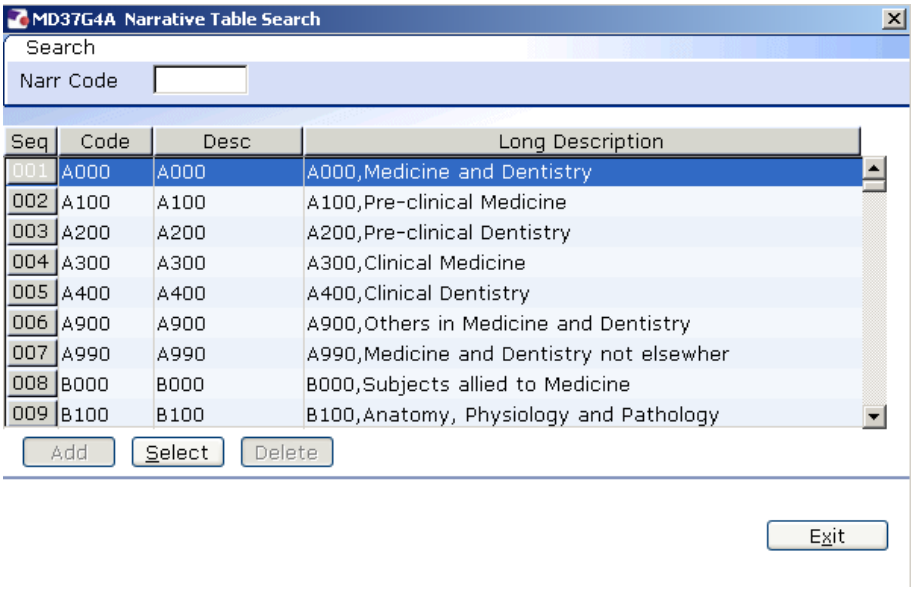
3.22 Press **Enter.**



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

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

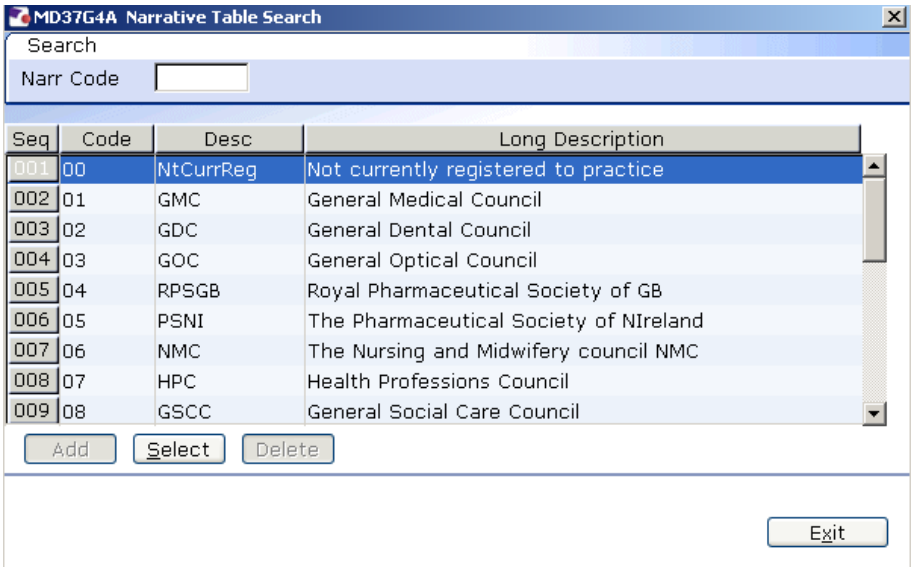
3.25 Press **Enter.**



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

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

3.28 Press **Enter.**



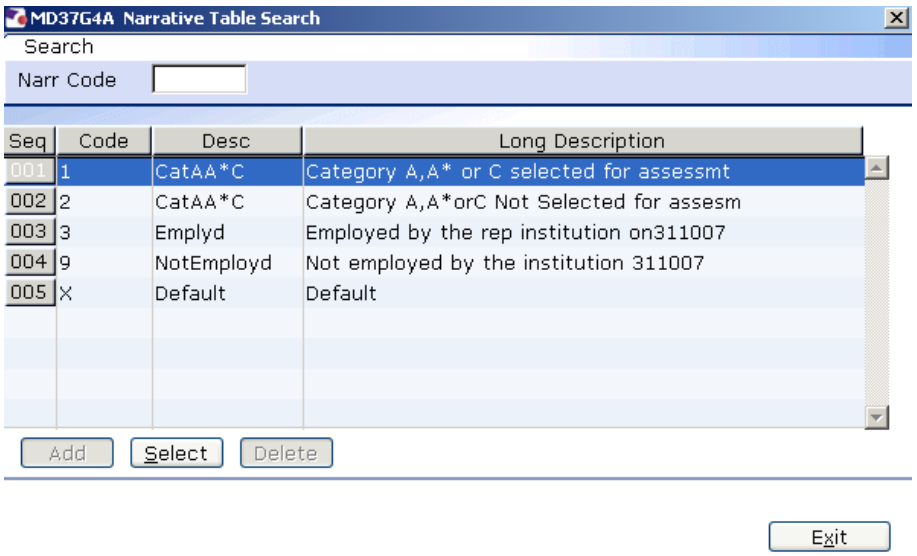
3.29 Scroll down the list and click on the new starter's Regulatory Body.

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

3.31 Leave the **Leaving Destination** blank (this is used when an employee leaves).

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

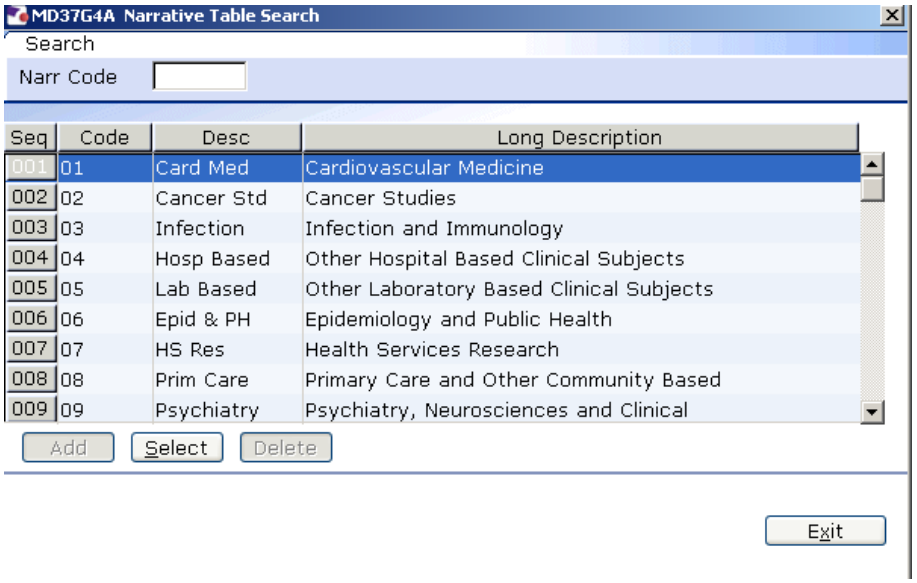
3.33 Press **Enter.**



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

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

3.36 Press **Enter.**

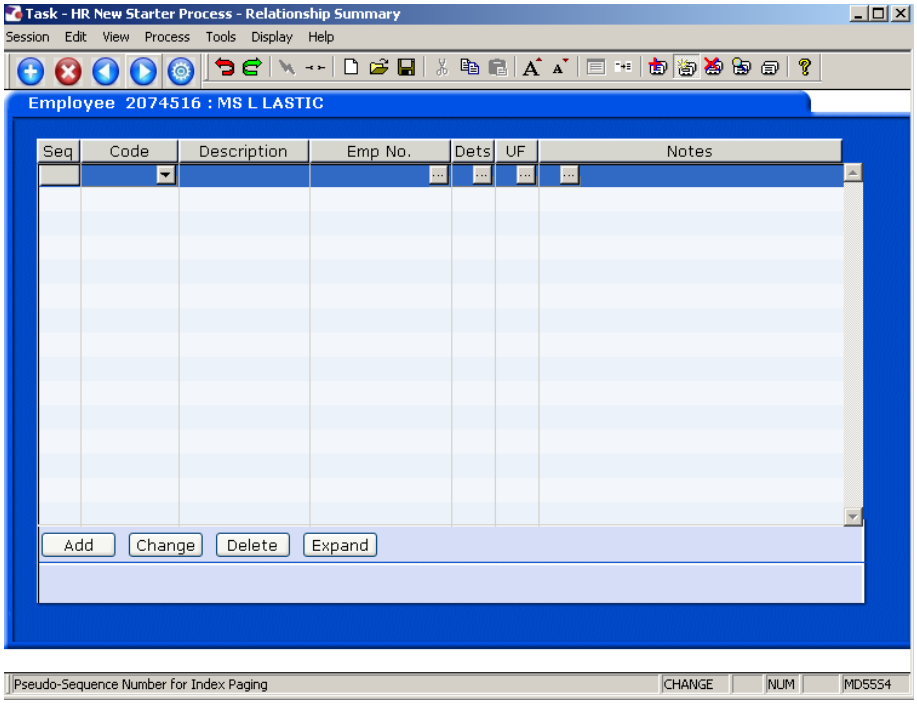


3.37 Scroll down the list and click on the Unit of assessment that applies to this new starter.

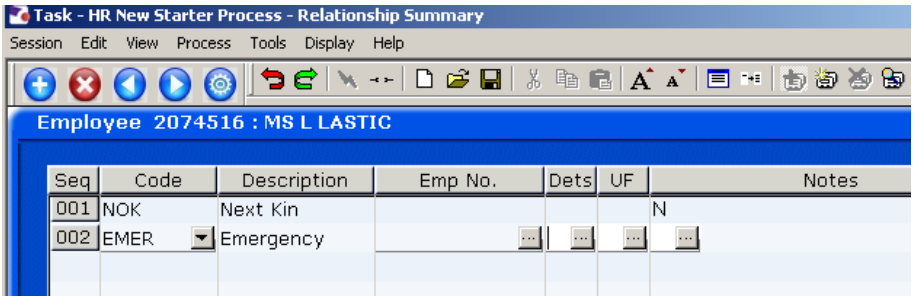
3.38 When you have completed all the HESA fields that apply to this employee, click on **Exit**.

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

4 Relationship Summary data entry screen



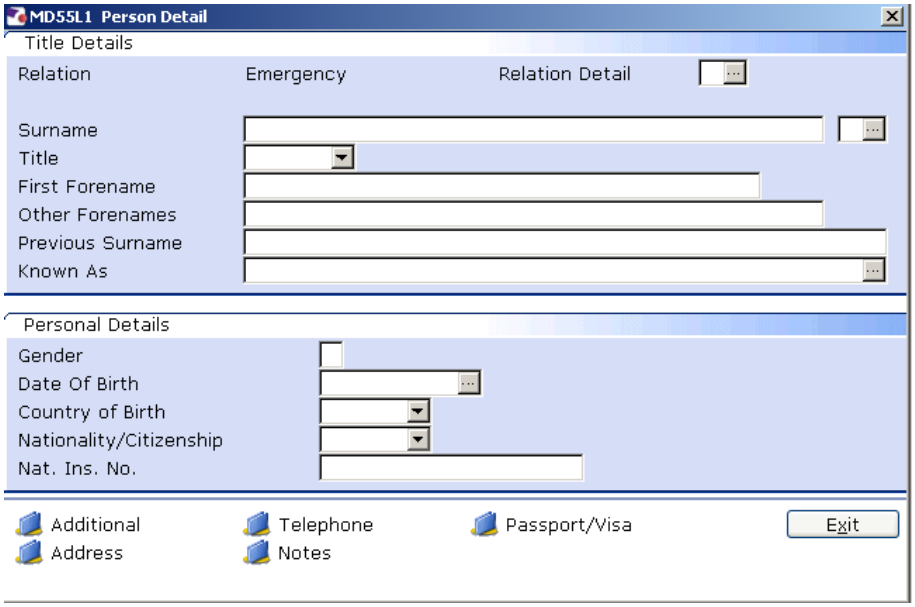
4.1 Click on **Add** to enter the details of the employee's next of kin.



4.2 Click on the down arrow in the **Code** field and select **NOK**.

4.3 **ENTER** past the **Emp No.** field.

4.4 **Window in** to the **Dets** field and complete the known personal details for the employee's next of kin.



4.5 Click on the **Address** and **Telephone** fields to enter this information.

4.6 Click on **Exit**.

4.7 If you wish to add more than one next of kin contact repeat the steps

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

5 Employee Work Permit Screen

Background Information:

It is imperative that these details are entered correctly so that information is picked up by the Work Permit/Visa report. Failure to do so could see the University employing an illegal worker and therefore incurring substantial fines. If there are any questions on the matter please discuss with your Senior HR Assistant.

The abbreviations that **must** be used in all instances to record this information are;

- An employee with a Work Permit (**WP**)
- An employee who has a work permit through their partner/spouse (Work Permit Dependant - **WPD**)
- An employee with a Visa (**V**) or Student Visa (**SV**) – this could be through a number of routes.
- An employee who had Indefinite Leave to Remain (**ILTR**)
- An employee who is classed as a Highly Skilled Migrant Worker (**HSMW**)
- An employee with either the Workers' Registration Scheme or Accession State Worker Registration Scheme (**WR**)
- International Graduates (**IG**)

For example, use of these abbreviations would be WP123454, SV243578 etc. If you have instances where there are permission types not covered please discuss with one of the Senior HR Assistants.

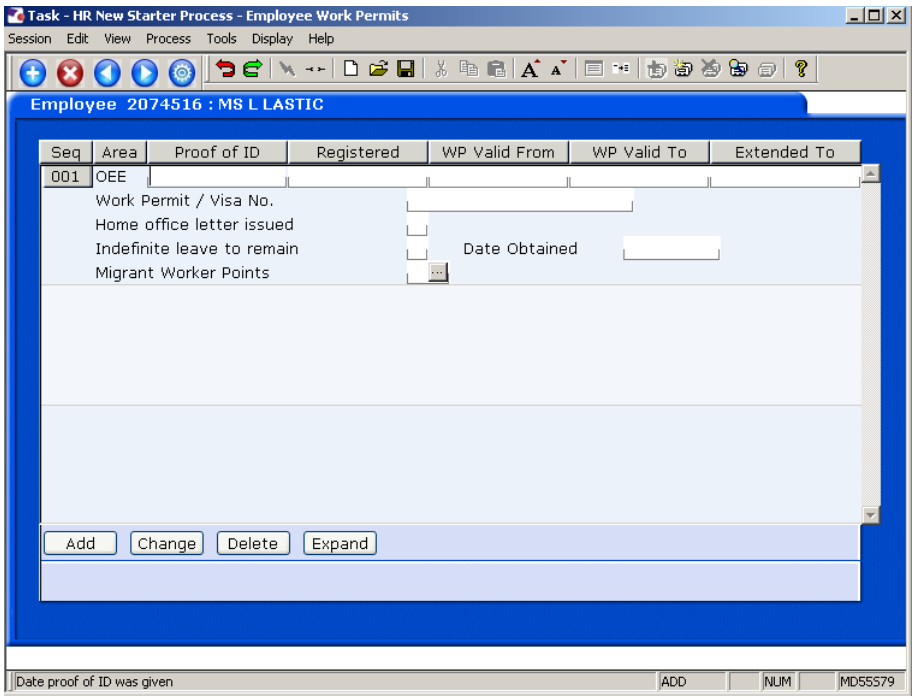
Please note that any one employed on a Work Permit must also have the right to work in the UK and therefore two rows must be entered – one with the WP number and dates and one with the LTR number and dates. In some instances there can be different end dates on these documents and therefore both must be entered to ensure that the employee is working legally. The table below sets out the number of rows required against each permission type.

Permission to Work in UK	Documentation Required	No of rows to be Used on Resourcelink	Restriction on Working in the post for which details obtained
Work Permit	WP PLUS LTR/Visa	2	None in post obtained for
Work Permit Dependent	LTR/Visa	1	On basis spouse Work Permit – therefore if this ends permission withdrawn
Visa	Visa Stamp	1/2 (plus WP if applicable)	

Student Visa	Student Visa Stamp	1	20 hours per week during term time – this should be included in contract
Worker Registration Scheme (from Accession states)	WR	1	None
Highly Skilled Migrant Worker	HMSW	1	None
International Graduates	IG	1	None
Indefinite Leave to Remain	ILTR	1 row for this but please note that if this is issued after someone has started with the University a new row MUST be added with this detail i.e. do not just add this to an existing row.	None

In instances where someone comes back to the University or works in a new post and the details on the previous post need to be maintained, please can you add a HP to the details relevant to their previous post – i.e. HP WP1231516171781 or HP LTR132526262524.

If someone is granted citizenship please add a CZ as a prefix.



The table below sets out how an entry should be made against each individual permission type:

Field	Work Permit	Work Permit Dependant	Student Visa/ Visa	Indefinite Leave to Remain	Highly Skilled Migrant Worker	Workers Registration Scheme	International Graduates
Proof of ID	Enter the date the proof of ID was given	Enter the date the proof of ID was given	Enter the date the proof of ID was given	Enter the date the proof of ID was given	Enter the date the proof of ID was given	Enter the date the proof of ID was given	Enter the date the proof of ID was given
WP Valid From	Enter the date this is valid from	Enter the date this is valid from	Enter the date this is valid from	Enter the date this is valid from	Enter the date this is valid from	Enter the date this is valid from	Enter the date this is valid from
WP Valid To	Enter the date this is valid to	Enter the date this is valid to	Enter the date this is valid to	Enter 01.01.2020	Enter the date this is valid to	Enter the date this is valid to	Enter the date this is valid to
Extended To	Only enter date when the Valid To date has been extended	Only enter date when the Valid To date has been extended	Only enter date when the Valid To date has been extended	Leave blank	Only enter date when the Valid To has been extended	Only enter date when the Valid To has been extended	Leave blank
Work Permit/Visa No.*	Enter Ref No. for **WP**	Enter Ref No. for **WPD**	Enter Ref No. for **V** or **SV**	Enter Ref No. For **ILTR**	Enter Ref No. for **HSMW**	Enter Ref No. for **WR**	Enter Ref No. for **IG**
Home Office Letter Issued	Enter Y or N	Enter Y or N	Enter Y or N	Enter Y or N	Enter Y or N	Enter Y or N	Enter Y or N
Indefinite Leave to Remain	Enter N	Enter N	Enter N	Enter Y	Enter N	Enter N	Enter N
Date Obtained	Leave Blank	Leave Blank	Leave Blank	Enter Date ILTR was granted	Leave Blank	Leave Blank	Leave Blank

Entering Both Work Permit & Visa Information:

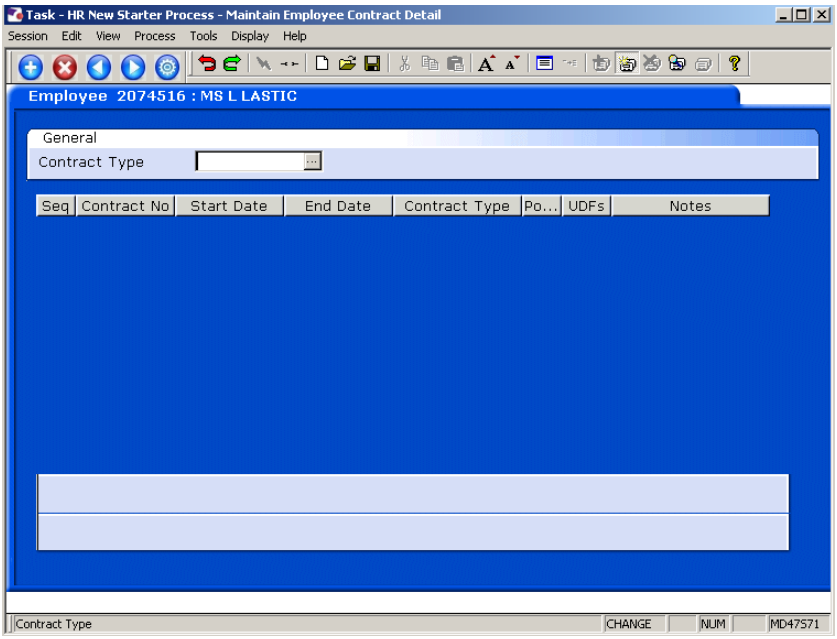
Separate rows will need to be entered on ResourceLink for the **Work Permit** Information and **Visa** Information if the type of permission to work in the UK warrants such permissions. Please refer to the table above to ensure that the correct number of rows of information is completed.

Click on to move to the next data entry screen.

6 Contract Details data entry screen

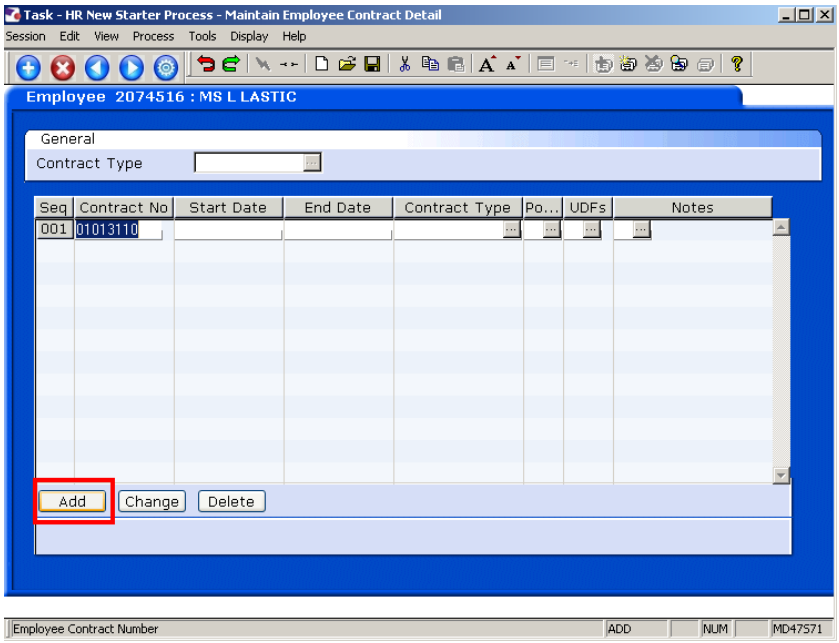
ⓘ Only used for **Fixed Term Contracts**

ⓘ The completion of this screen ensures that the University complies with Employment Legislation by identifying the number and reason of extensions to fixed term contracts.



6.1 Press **ENTER** to pass the **Contract Type** field.

6.2 Click on **Add**.



6.3 ResourceLink will generate a **Contract Number**.

6.4 Press **ENTER**.

6.5 Enter the **Start date** of the Fixed Term Contract.

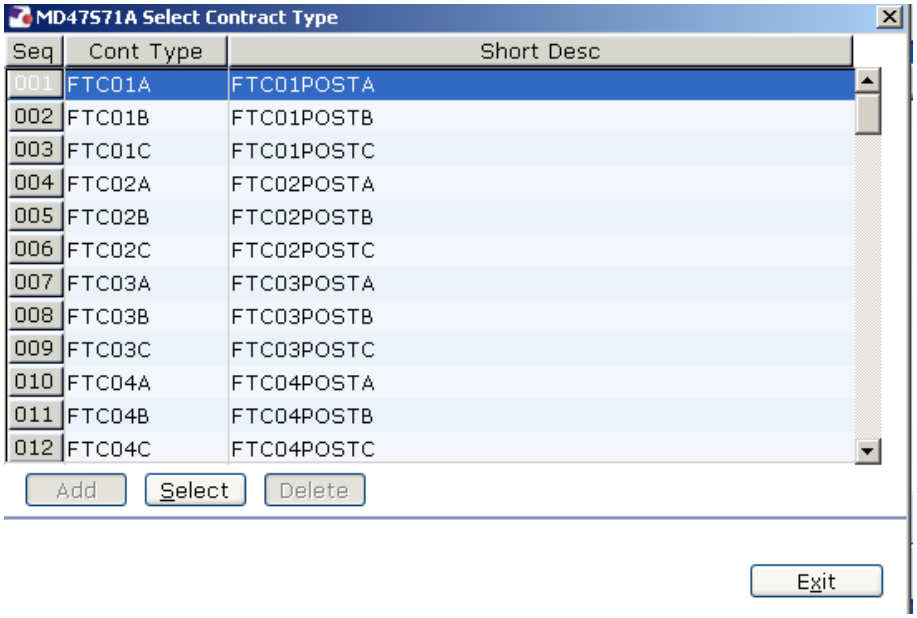
ⓘ If the employee is full time and starting work on a Monday, the start date must be the Monday. If they are starting mid-week enter the date of their first working day.

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

6.6 Press **ENTER**.

6.7 Do not enter an end date.

6.8 **Window in** to the **Contract Type** field. The following list will be displayed.

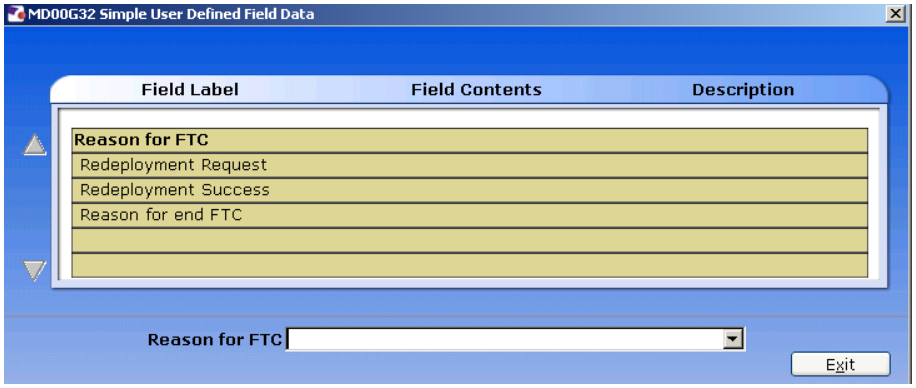


6.9 Select the **FTC01A** Contract Type.

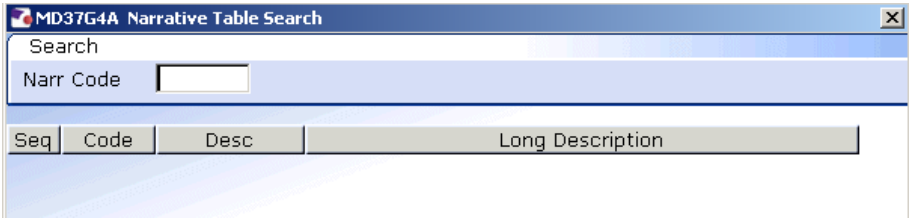
ⓘ FTC01B is used for staff with an FTC on a second post (see **Multi Post Starter** work instruction)

6.10 Press **Enter** through to the UDF's field.

6.11 Window into UDF

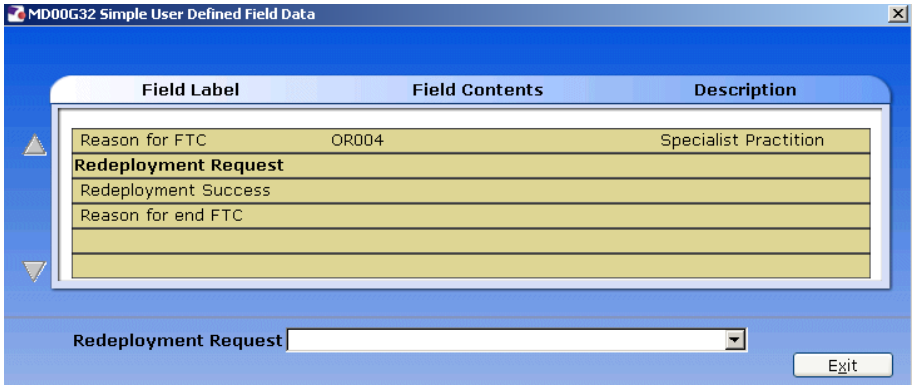


6.12 Click on the drop down against the **FTC Extension Reason** field



6.13 Enter through the **Narr Code** field

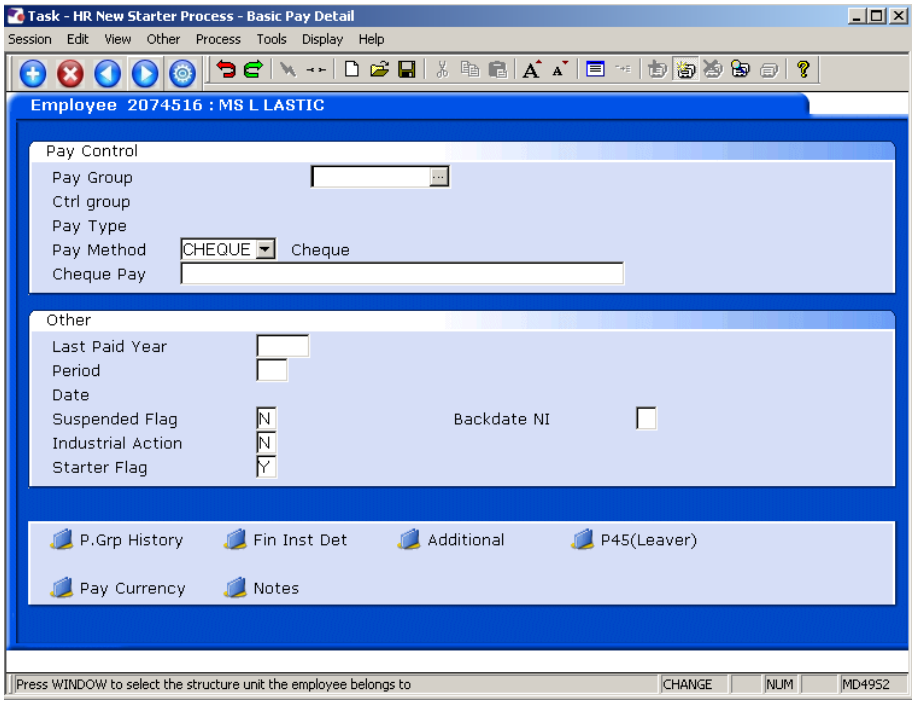
6.14 Click on the appropriate reason for the FTC



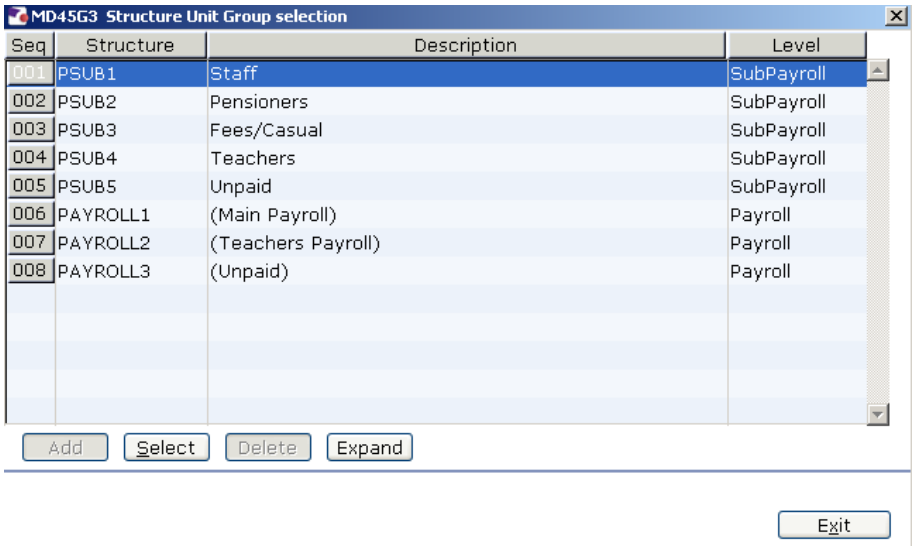
6.15 Click on **Exit**

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

7 Basic Pay Details data entry screen

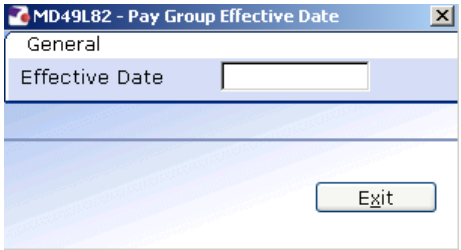


7.1 **Window in** to the **Pay Group** field.



7.2 Select the correct PSUB Pay Group. Staff on the Main Payroll must be attached to **PSUB1**.

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



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

ⓘ If the employee is full time, the start date must be the Commencement Date on the HR form.

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

7.5 Leave the **Pay Method** as **CHEQUE**. (Payroll will change this to BACS when they enter the employee's bank details.)

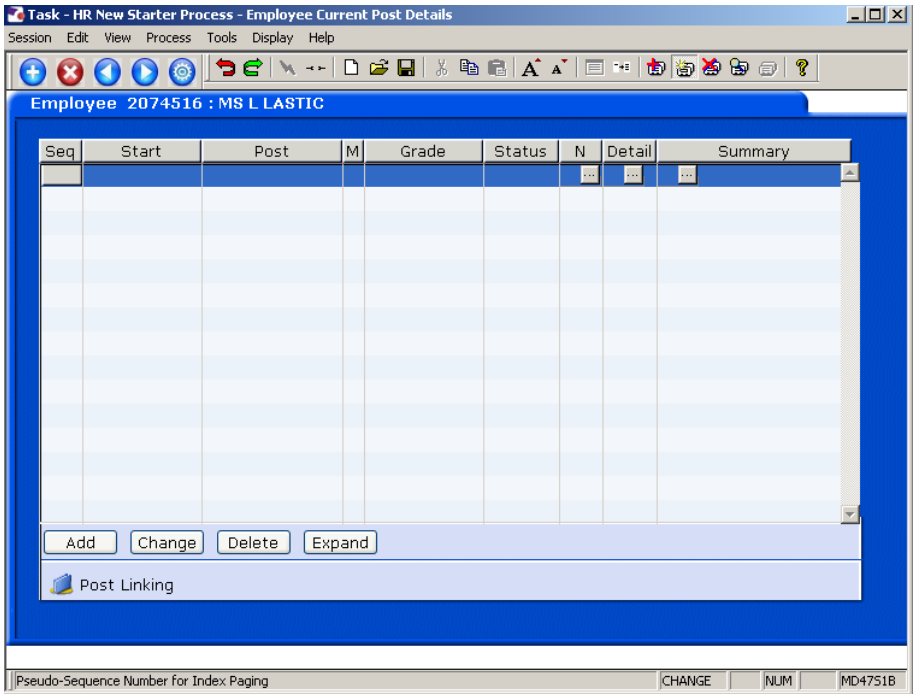
7.6 Press **Enter**.

7.7 Enter **Y** in the **Suspended Flag** field (**for single post employees only**). This will suspend them from being paid until their contract is signed and returned. See **Contract Returned** Work Instruction for guidance on removing this flag.

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

8 Current Post Holding data entry screen

This screen contains information about the person's post(s) at the University.



8.1 Click on **Add** to enter the Current Post Holding data for the employee.

8.2 Type in the **Start Date**.

ⓘ If the employee is full time the start date must be the Commencement Date on the HR Form

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

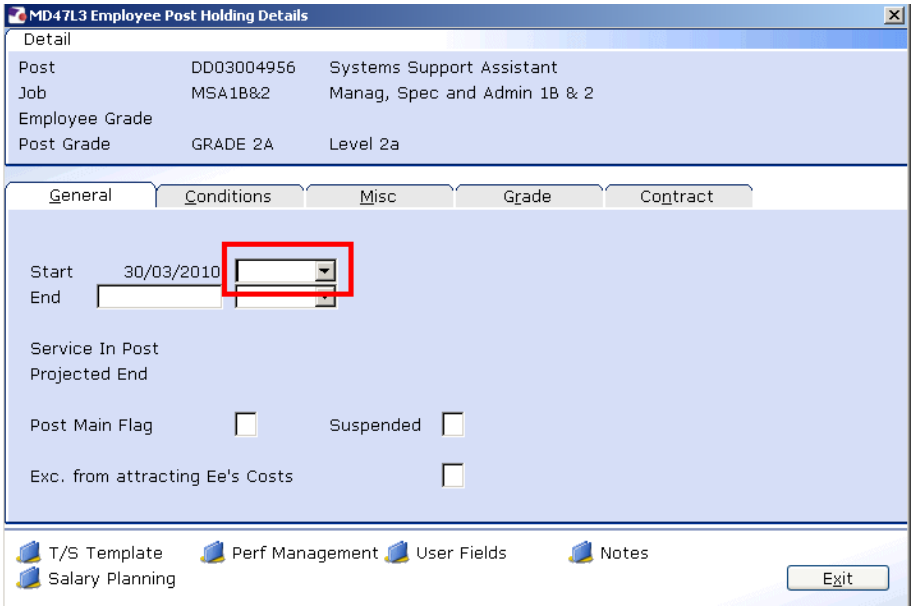
8.3 Press **ENTER**.

8.4 Type the Post Number into the **Post** field. (The Post number will be located on the HR Form)

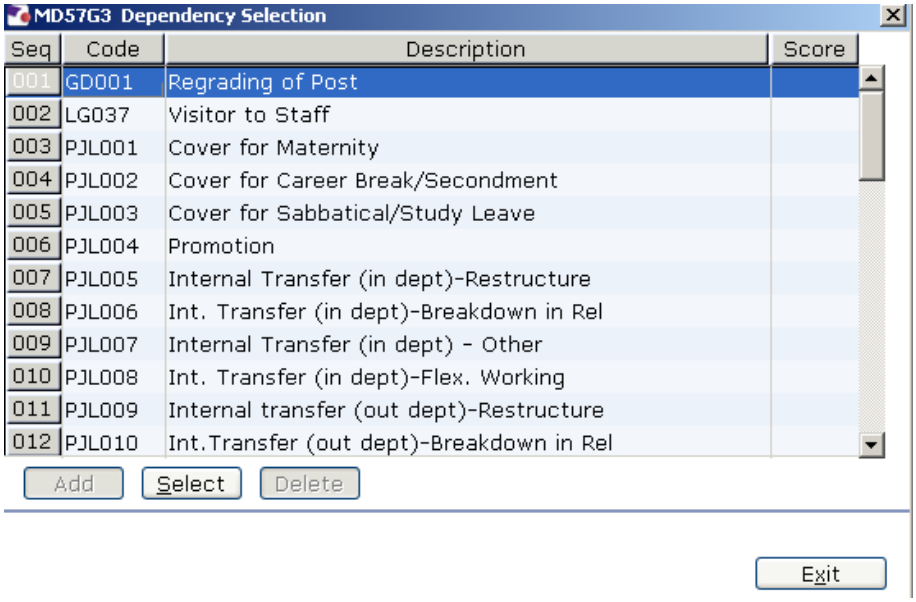
8.5 Press **Enter**.

ⓘ If you see a dialog box warning that the FTE is being exceeded click on **Exit**.

8.6 Click in the **Details** field and **Window in**.



8.7 Click on the drop down list in the highlighted field. A list of reasons will be displayed:

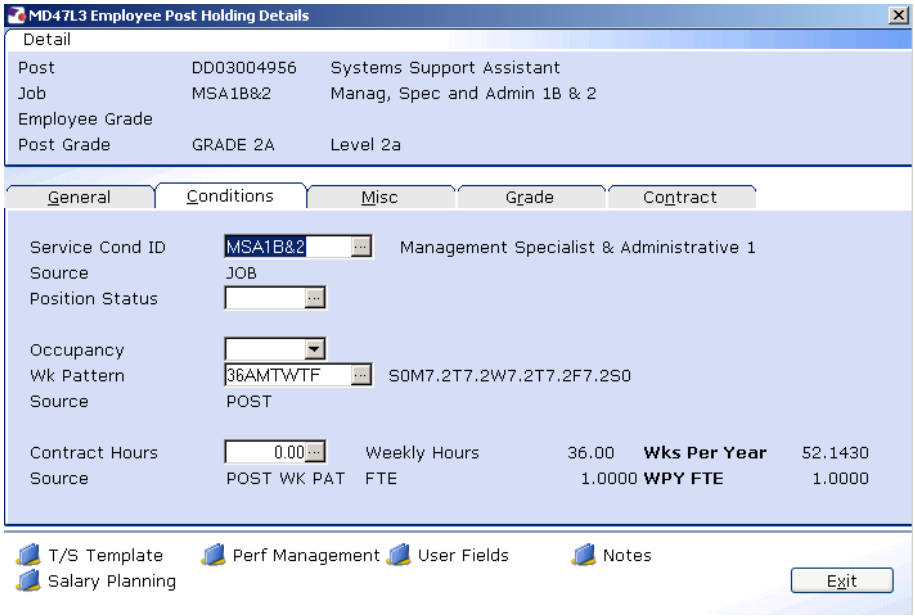


8.8 Select the appropriate reason for this New Starter. In most cases this will be **SG001- New Appointment.**

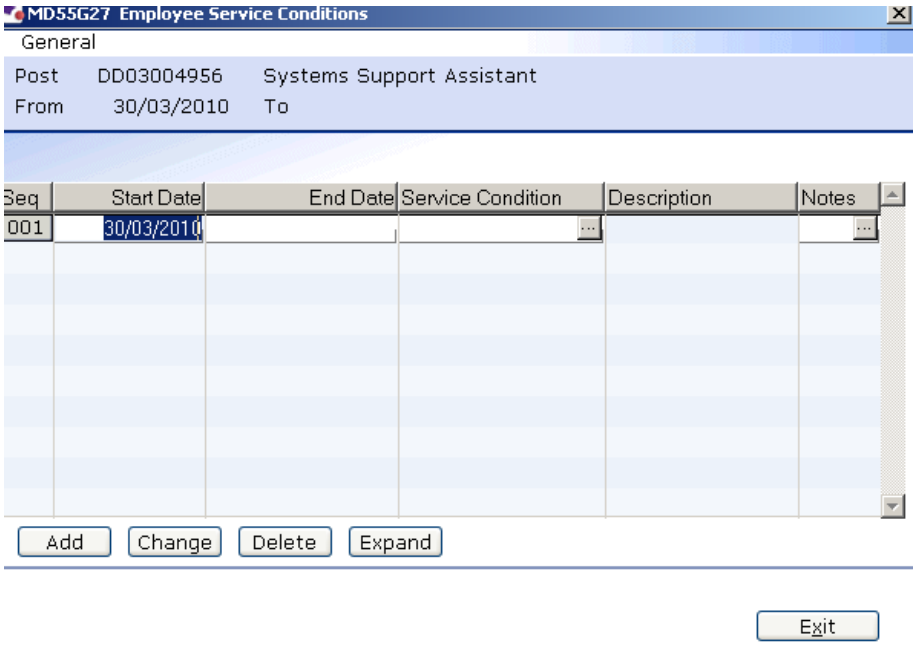
- You will have to enter the Reason again in a later field – you must be consistent.

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

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



8.11 **Window in** to the **Service Cond ID** field

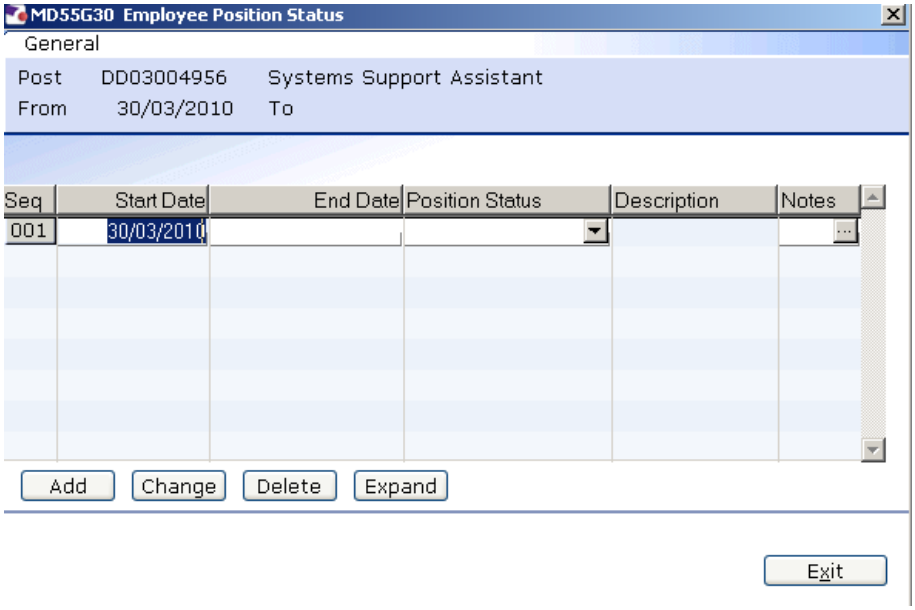


8.12 Click on **Add** and press **Enter** three times to pull through the Service Conditions.

8.13 Please ensure that the correct service condition is showing as this impacts several other areas of the system, as well as reports, and can also impact whether or not the person will get paid. If you are unsure, please check with a colleague.

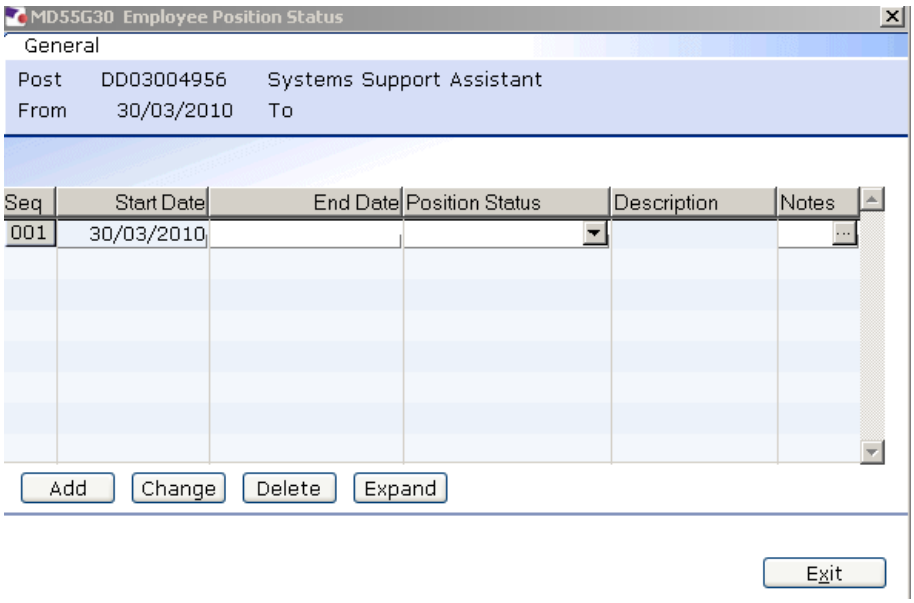
8.14 Click **Exit**.

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



8.16 Click on **Add**.

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

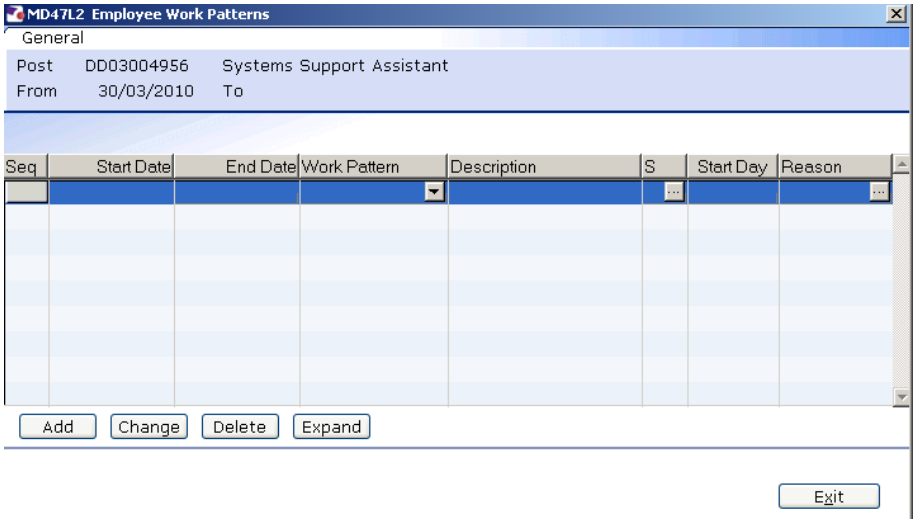


8.18 Select the relevant **Position Status** from the list.

Please ensure you select the correct position status as what you enter here impacts several other areas of the system, as well as reports, and can also impact the person's pay. If you are unsure, please check with a colleague.

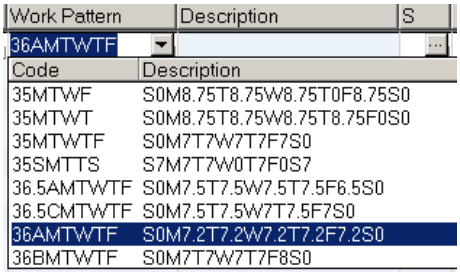
8.19 Press **Enter** to move through the remaining fields and click **Exit**.

8.20 **Window in** to the **Wk Pattern** field. The following screen will appear:



8.21 Click on **Add** and enter through the fields.

8.22 If the correct work pattern has not defaulted into the **Work Pattern** field, select the appropriate work pattern from the **Work Pattern** drop down list.



8.23 Scroll down the list and click on the correct pattern

ⓘ The **Descriptions** indicate the hours that are worked each day within that pattern e.g. S0M6T6W6T6F6S0 (this pattern is 6 hrs a day Mon – Fri), all patterns start on Sunday and end on Saturday.

8.24 The **Start Day** field refers to which day of the week the employee's Commencement Date is (check their HR Form):

Start Day	**Day Number**
Sunday	1
Monday	2
Tuesday	3
Wednesday	4
Thursday	5

Friday	6
Saturday	7

8.25 Enter the appropriate number into the **Start Day** field (e.g. for a Monday you should enter “2”)

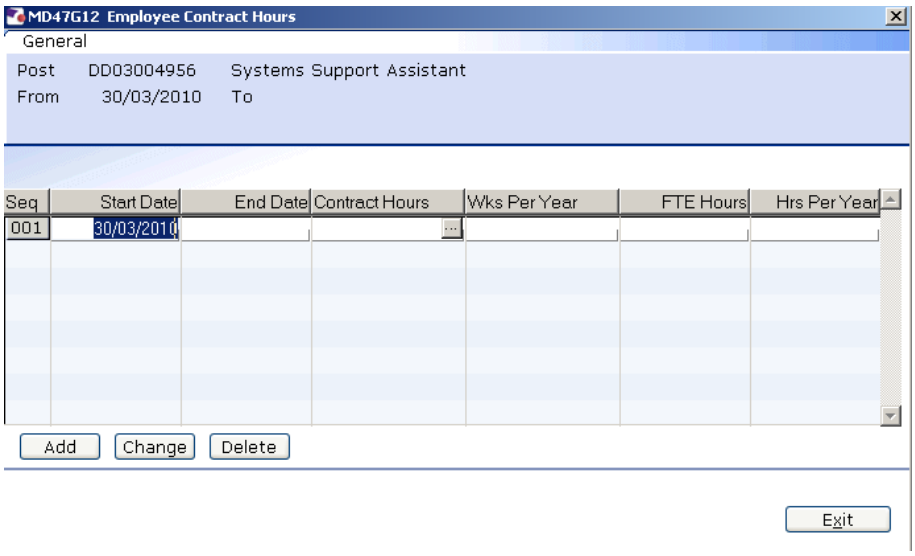
- Please note that although the vast majority of work patterns are 7 day work patterns, there are a few which are longer (14 days, 21 days and even a few 56 day patterns) – in these cases you will need to work out not only which day of the week the person starts on (e.g. Monday) but also which Monday of their 2 week, 3 week, etc. pattern this is – i.e. are they starting on the first Monday of the pattern (day 2) or the second Monday of the pattern (day 9) etc.

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

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

8.27 Press **Enter** and **Exit**.

8.28 **Window in** to the **Contract Hours** field.



8.29 Click on **Add** to bring through the **Start Date** and press **Enter** twice.

8.30 In the **Contract Hours** field, enter the weekly working hours.

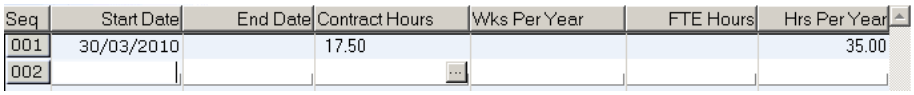
8.31 Press **Enter**.

8.32 If the employee works less than the whole 52.143 weeks per year, enter the number of weeks per year that they will be working (e.g. “44”)

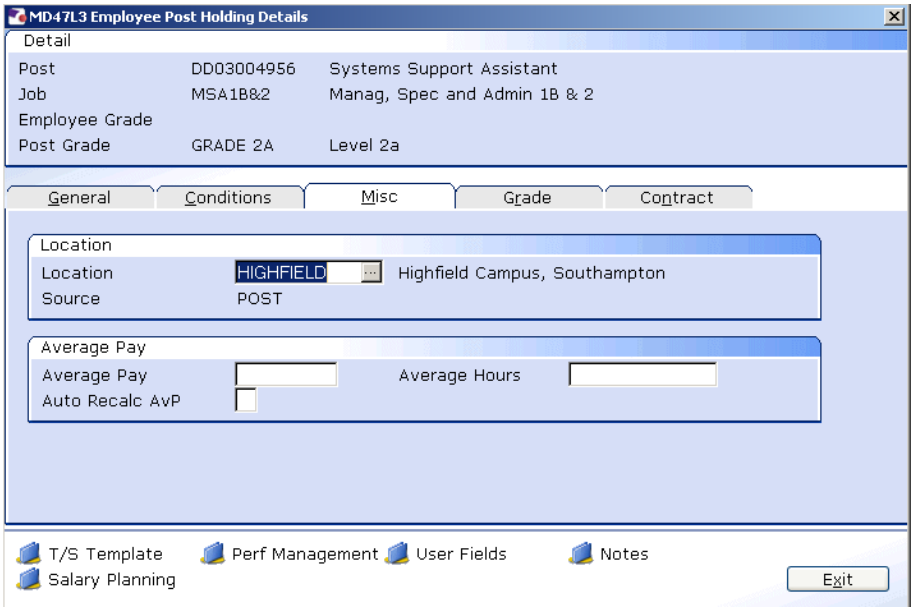
- If the employee is working a Full year (52.143 weeks), then leave the **Wks Per Year** field blank.

8.33 Press **Enter**.

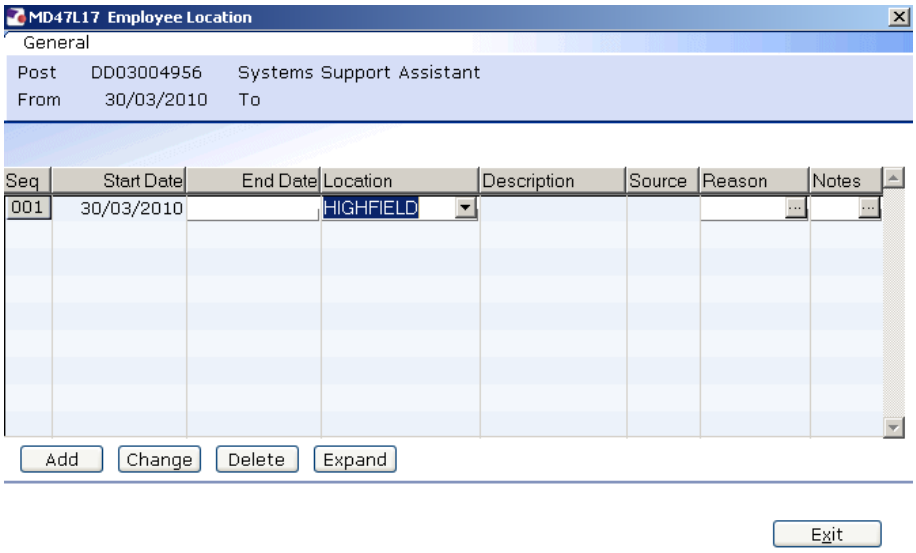
8.34 In the **FTE Hours** field enter the number of hours per week that a Full Time Equivalent would work in this post. For example, although someone in a MSA4+ post might only be working 17.5 hours per week the post itself may well have an FTE of 35 hours, in which case you would enter this in the FTE Hours field.



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



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



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

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

8.39 Press **Enter**.

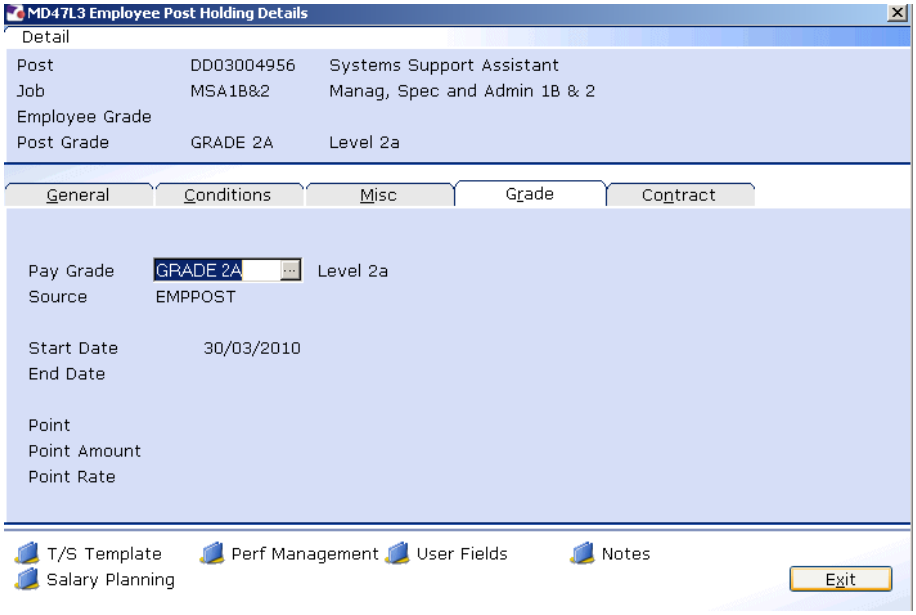
8.40 **Window in** to the **Reason** field and select the reason for the appointment.

- The reason MUST be the same as was entered at instruction 8.8.
- Please note that this information must be entered otherwise the employee will not be picked up on the HR reports.

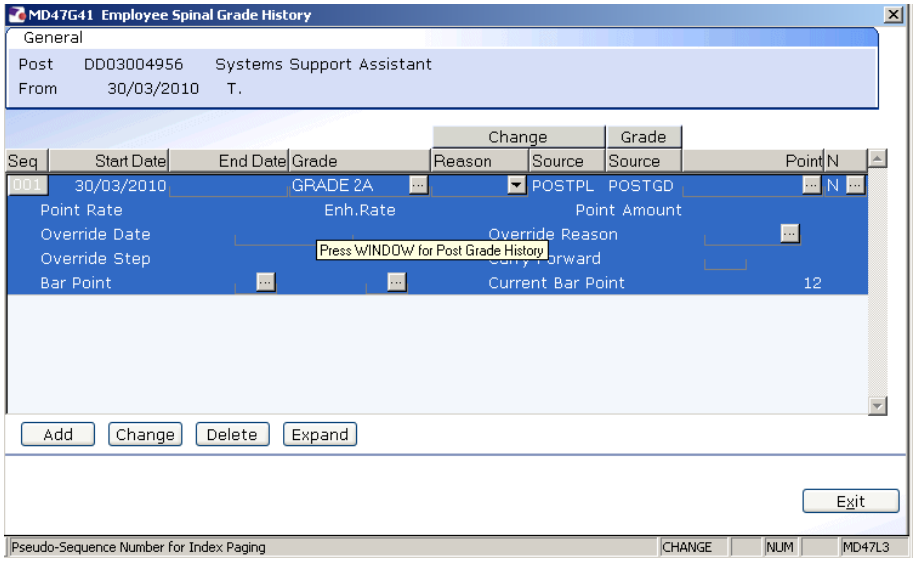
8.41 Press **Enter**.

8.42 Click **Exit**.

8.43 Click on the **Grade** tab.

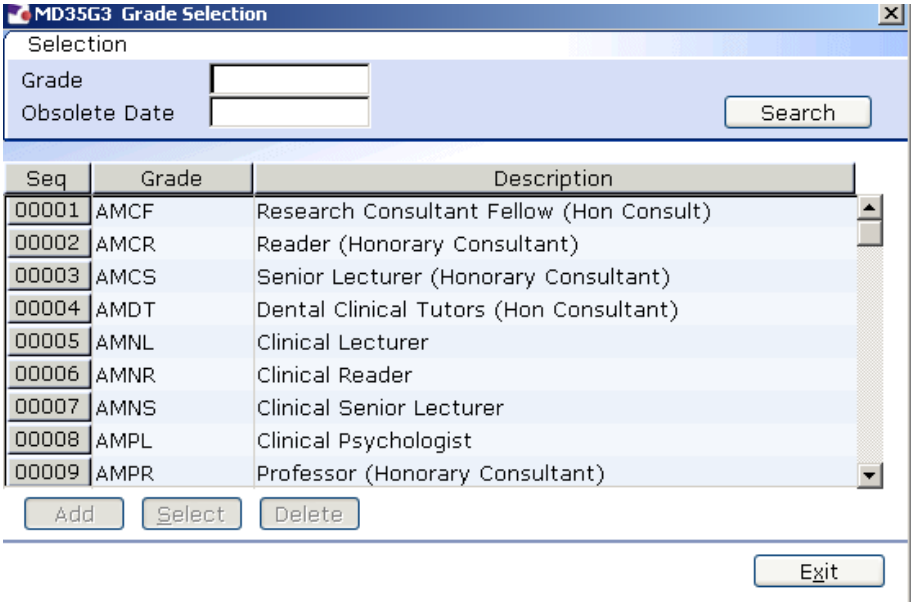


8.44 Window in to the **Pay Grade** field.



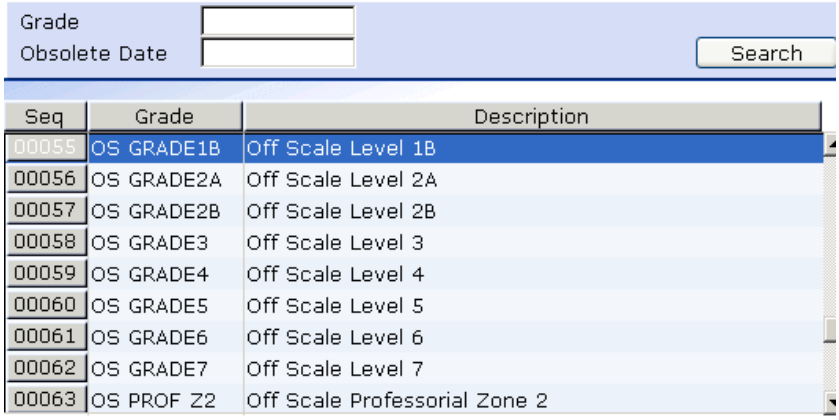
8.45 The **Grade** will pull through from the post, however if this is wrong it can be overwritten in this screen.

8.46 If this is incorrect or if the employee is on a **Off Scale Salary** or works above the standard hours for their grade (paid on **Hourly Rate Grades** e.g. Nursery staff, Halls Cleaning, Security), window into the **Grade** field.

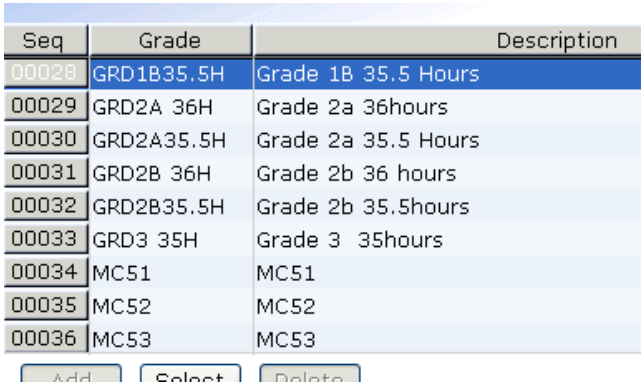


8.47 Scroll down the list and select the correct grade or click on the off scale equivalent grade (see examples below of **Off Scale Grades** and **Hourly Rate Grades**).

Off Scale Grades



Hourly Rate Grades

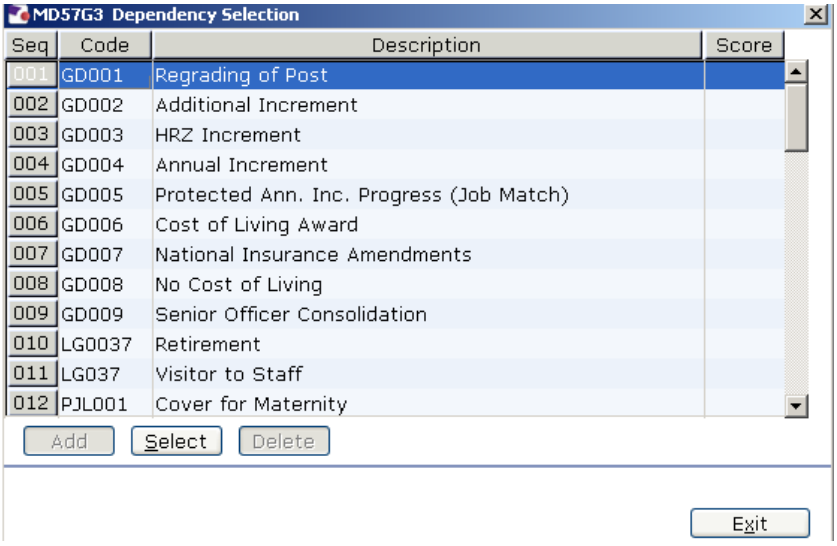


8.48 Click on the appropriate Grade or Grade Equivalent for this employee.

8.49 Press **Enter.**

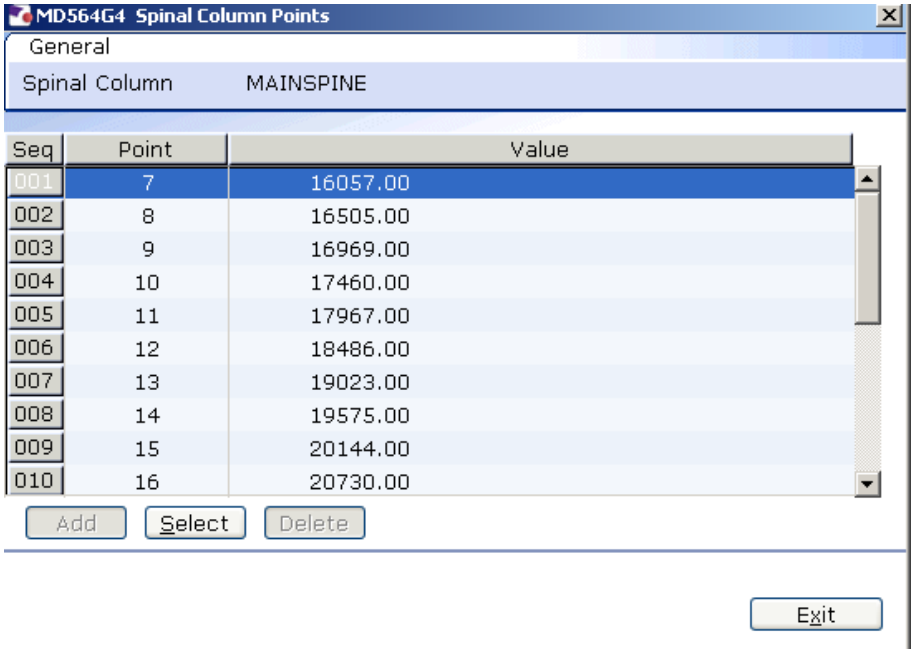
8.50 In the **Reason** field, click on the drop down and scroll down the list and select the reason for the appointment.

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



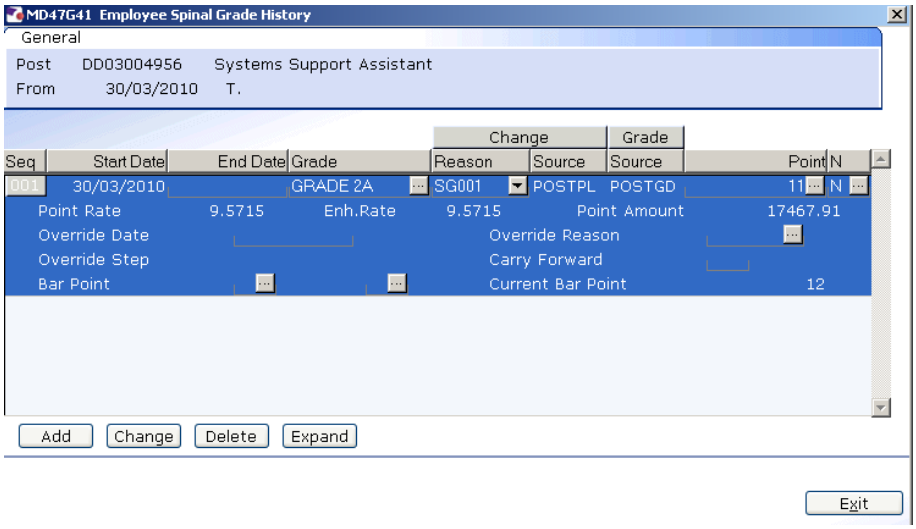
8.51 **Window in** to the **Point** field and select the **Salary Point** for this employee.

ⓘ You will not need to select a point if the employee is paid an **Off Scale Salary,** in which case leave this field blank



- If the employee is on a point within the **HRZs** the bar point will have to be changed first before the point can be selected.

- Please note, you should not move anyone into the HRZ area unless this has been specifically agreed by the School / Department in consultation with HR.



Annual increments:

Note: For most service conditions, the system will automatically award an increment on the next 1st August unless there is an alternative date entered in the "Override date" field (or if the person has already reached their bar point).

A person is only entitled to receive an extra increment if they have been in post at least 6 months by the time the 1st August comes round.

- **Please note however that there are some service conditions were the above is not applicable:**

  Clinical Consultants, Professorial staff, Level 7 non-professorial staff, ERE staff appointed prior to 01/10/2004 protected on level 3

  For staff in posts under these service conditions please follow the instructions in the blue box below.

So, if you are entering a new starter to the University who is starting between 1st August and 1st February then you can safely leave the "Override date" field blank as they will have been in post for 6 months or more by 1st August and should receive a normal increment, which they will automatically (unless they have already reached their current bar point).

Any new starter who will not have been in post for more than 6 months by 1st August (i.e. anyone starting after 1st February of that year) should not receive an increment in August of that year. In such cases, you should:

- Click in the "**Override Date**" field and enter the appropriate date for when they should next get an increment (typically the 1st of August of the following year)

- Click on the "Override Reason" field and select "OR006" (Deferred increment due to start date).

- Press **Enter**

- Ensure that a **"1"** is entered in the "**Override Step**" field (so that they will only receive one extra increment).

- Ensure that a **"N"** is entered in the "**Carry Forward**" field – this will mean that in subsequent years the person will receive an increment on the standard date for that Service Condition (typically the 1st August).

- Please note: If you need to add an increment grade row to a record and there is already a future dated grade row which is scheduled to begin after the date of the increment you will need to manually remove and re-enter this.

  For example, if in June you were instructed to add an additional increment to someone's record from 1st August but notice that there is already a grade row starting on 1st September, you would need to:

  - copy down the details of this future dated grade row, then delete the row
  - add in the increment row from 1st August, then
  - re-add the row starting 1st September.

- If you do ever need to delete and then re-add a grade row, do ensure that you copy the details exactly.

If you have been instructed that a new starter should receive their additional increments on the date of their anniversary – or on a particular date which isn't the standard 1st August – then you should:

- Click in the "**Override Date**" field and enter the appropriate date (such as their anniversary date or other specified date)

- Click on the "**Override Reason**" field and select "**OR001**" (Increment on anniversary) or another relevant reason code.

- Press **Enter**

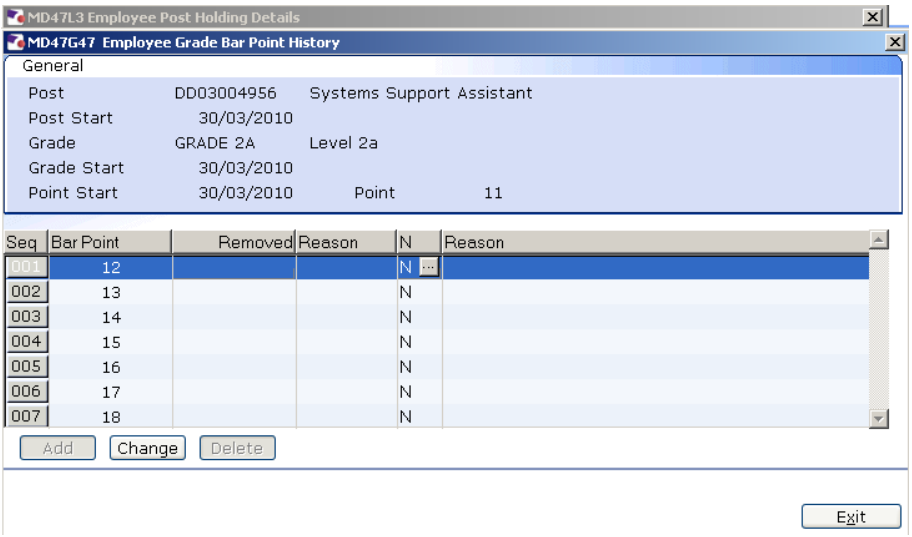
- Ensure that a **"1"** is entered in the "**Override Step**" field (so that they will only receive one extra increment).

- Ensure that a **"Y"** is entered in the "**Carry Forward**" field – this will mean that in subsequent years the person will receive additional increments on the date you have entered above.

Please note that non-standard incremental progression is only applicable in very limited instances. These are **Clinical Consultants, Professorial staff, Level 7 non-professorial staff, ERE staff appointed prior to 01/10/2004 protected on level 3**

8.52 If you have been instructed that the employee is to be entered on a point that is within the HRZ's click in the **Bar Point** field.

- Please note, you should not move anyone into the HRZ area unless this has been specifically agreed by the School / Department in consultation with HR.



8.53 Click on the current bar point at the top of the table and click in the **Removed field.**

8.54 Enter the **date** that the bar point has been removed and press **ENTER** three times**.**

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

8.55 Repeat this process for each bar point that is to be removed. The new Bar Point will be the next point without a Removed date.

8.56 Click on **Exit.**

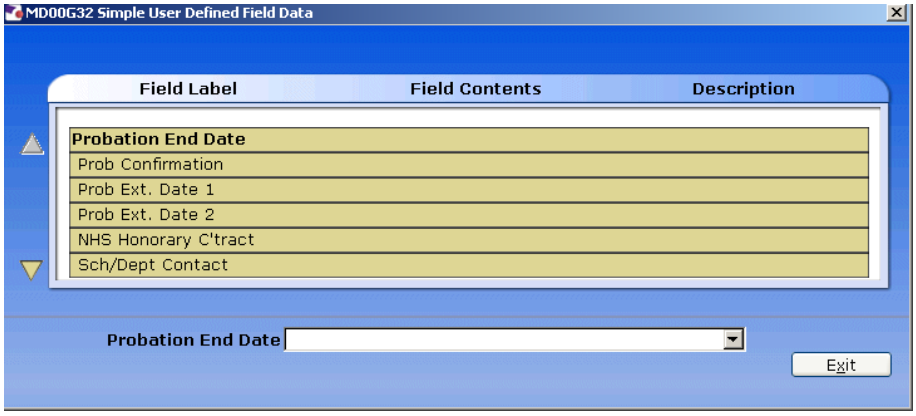
8.57 Press **Enter** to update **Current Bar point.** You can now go back to the **Point** field and enter a point within the HRZ.

Please note: if you are ever entering a backdated grade row which will precede a cost of living increase you will need to:

- add a grade row from the start of the new post until the end of the old rate
- then add a new row from the start date of the latest cost of living increase

8.58 Press **Enter** to move through the remaining fields and click **Exit**.

8.59 Click on **User Fields**.

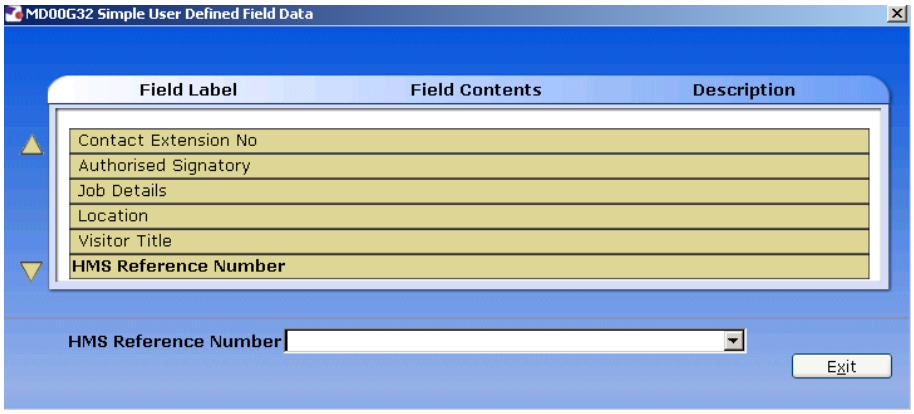


8.60 Type in the **Probation End Date**.

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

8.61 Using the scroll buttons , scroll down to the bottom of the screen

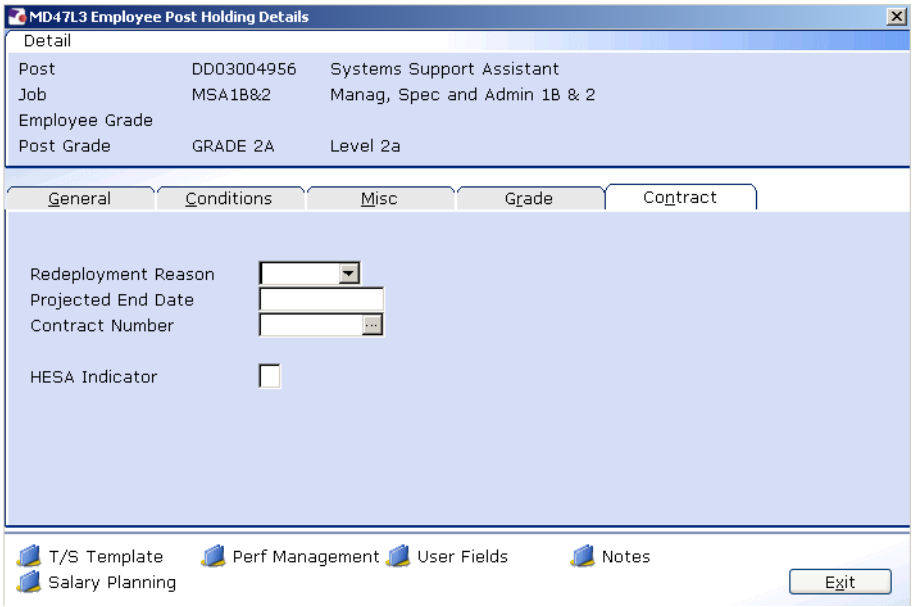
8.62 Click on **HMS Reference Number**



8.63 In the **HMS Reference Number** field enter the HMS Ref. No for this post.

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

8.65 Click on the **Contract** tab.



ⓘ The **Redeployment Reason** field is not used.

8.66 If the employee is on a Fixed Term Contract enter a **Projected End Date.**

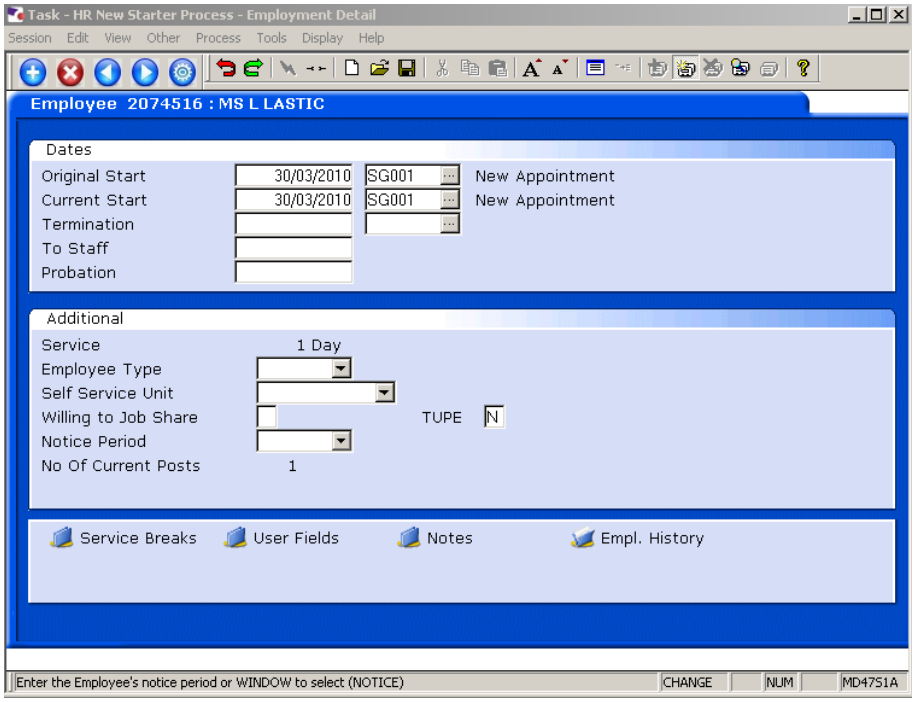
8.67 If the employee is an FTC, click in the **Contract Number** field, window in and select the contract entered previously on the **Contract Details** Screen.

8.68 If the post is HESA returnable type **Y** into the **HESA Indicator** field. (All Main Payroll staff will have a **Y** in this field)

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

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

9 Employment Detail data entry screen



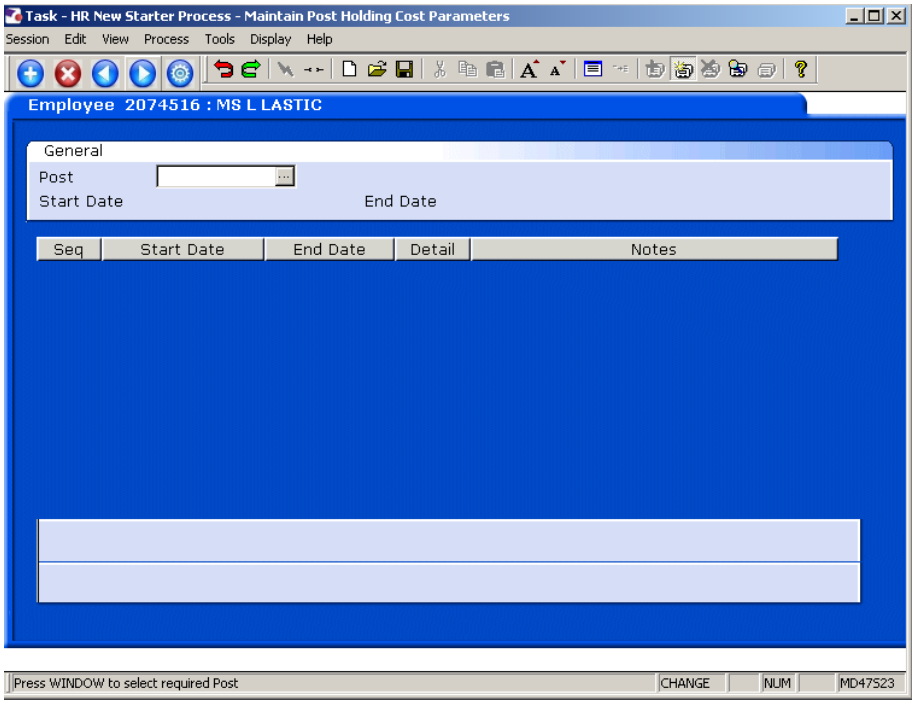
9.1 Click in the **Notice Period** field and select the Notice Period from the drop down list.

9.2 Press **Enter**.

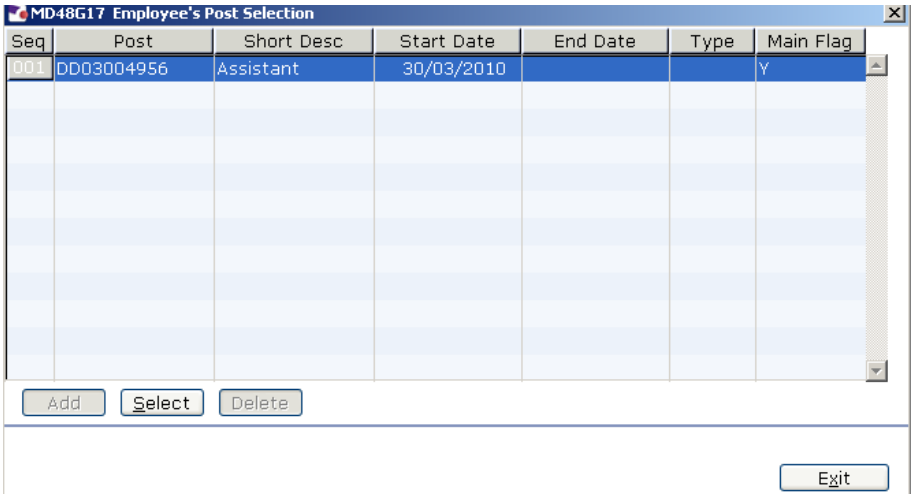
9.3 Click on to move to the next data entry screen.

10 Post Holding Costing data entry screen

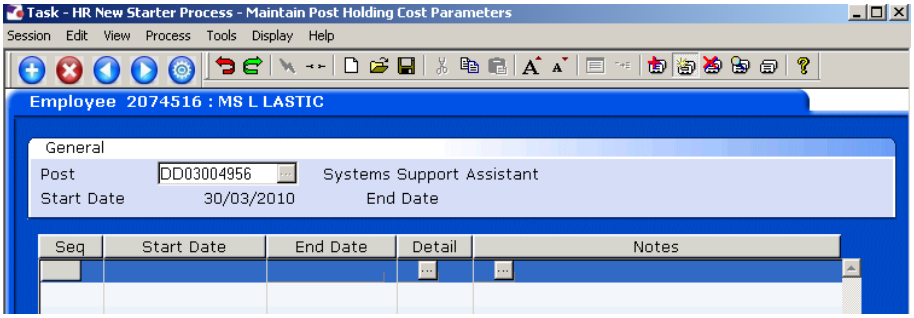
ⓘ You must always complete this screen and attach a Cost Centre to the Post Holding.



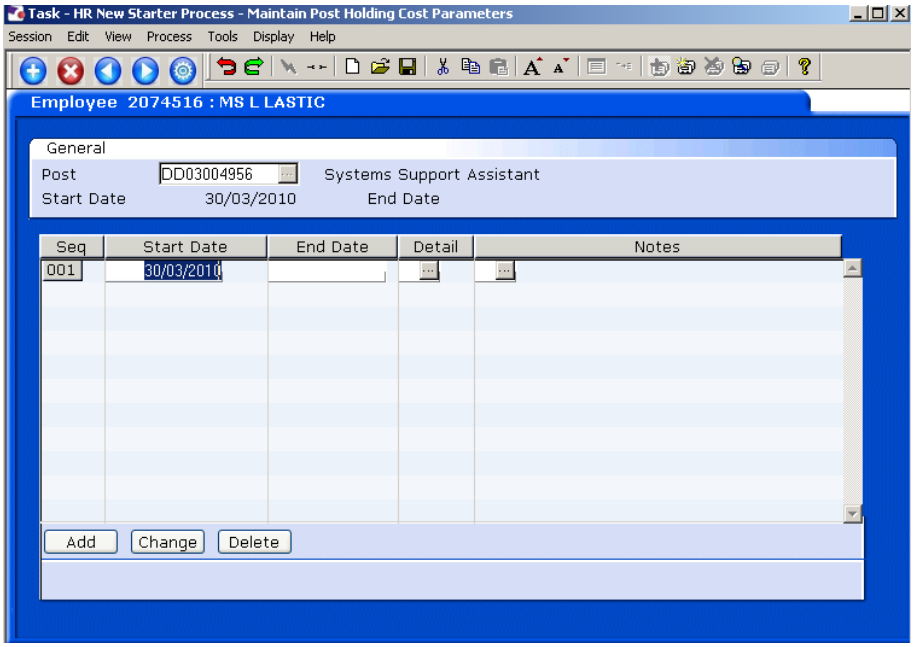
10.1 Window into the **Post** field.



10.2 Click on the new post.



10.3 Press **Enter**.

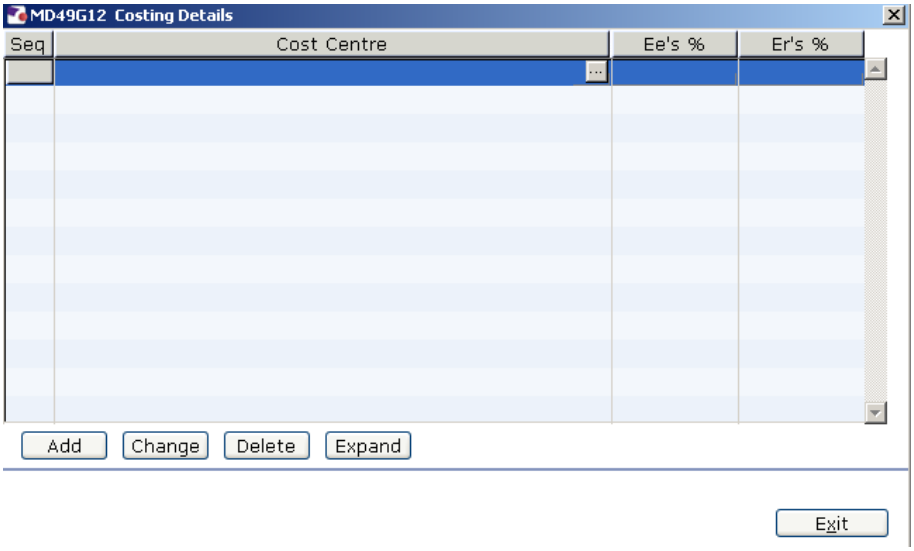


10.4 Click on **Add**

10.5 In the **Start Date** field enter the start date of this post.

10.6 Press **Enter**.

10.7 Leave the **End Date** field blank, **Enter** through.



10.8 Click on **Add**.

10.9 Enter the **Cost Centre** number (Sub Project Code- starts with 5)that this post is to be paid from. Press **Enter**.

10.10 In the **Ee's** field enter the percentage that this post is to be paid from this cost centre e.g. 100

10.11 In the **Er's** field enter the percentage that this post is to be paid from this cost centre e.g. 100

10.12 Press **Enter**.

10.13 If the post is to be paid from more than 1 cost centre, add another row of information.

- Please ensure that the Ee's Column adds up to 100%
- Please ensure that the Er's Column adds up to 100%.

10.14 Click on **Exit**.

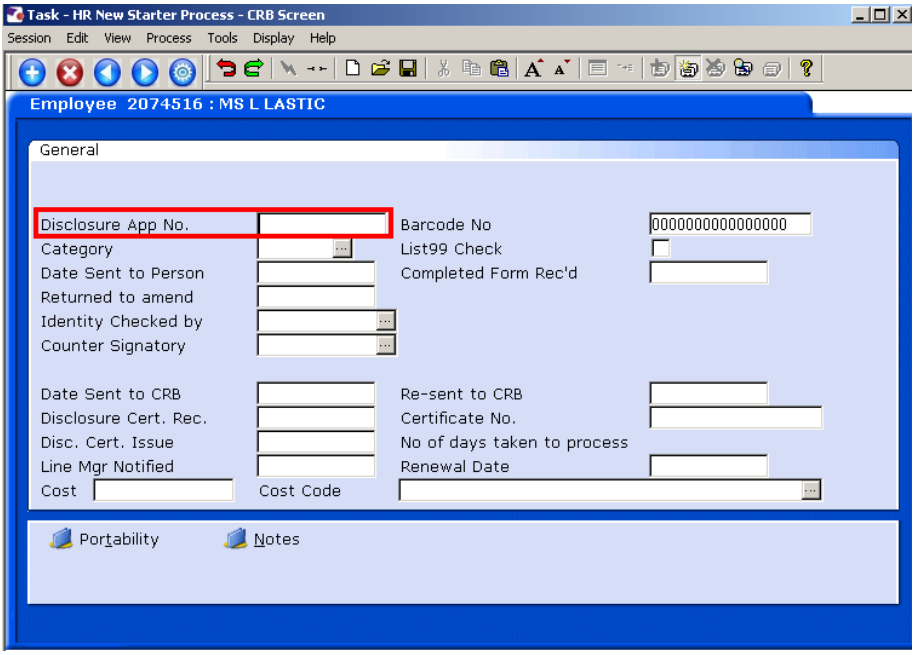
10.15 Press **Enter**.

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

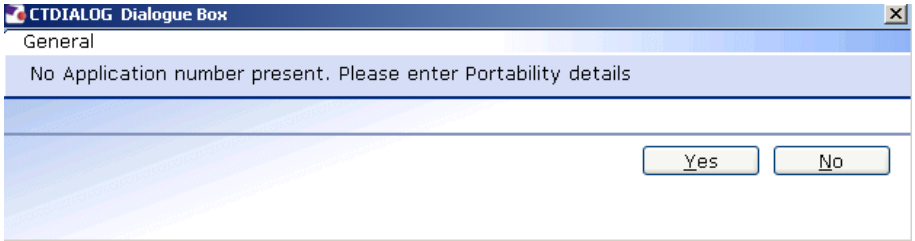
11 Completing the CRB Details Screen

CRB Details screen

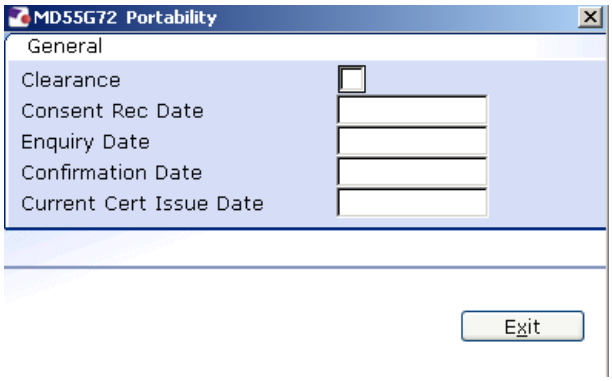
11.1 Enter the '**Disclosure Application Number**' if known



11.2 If you do not know the Disclosure Application Number, press enter to go past the field and the following message will appear:



11.3 Click on **Yes**

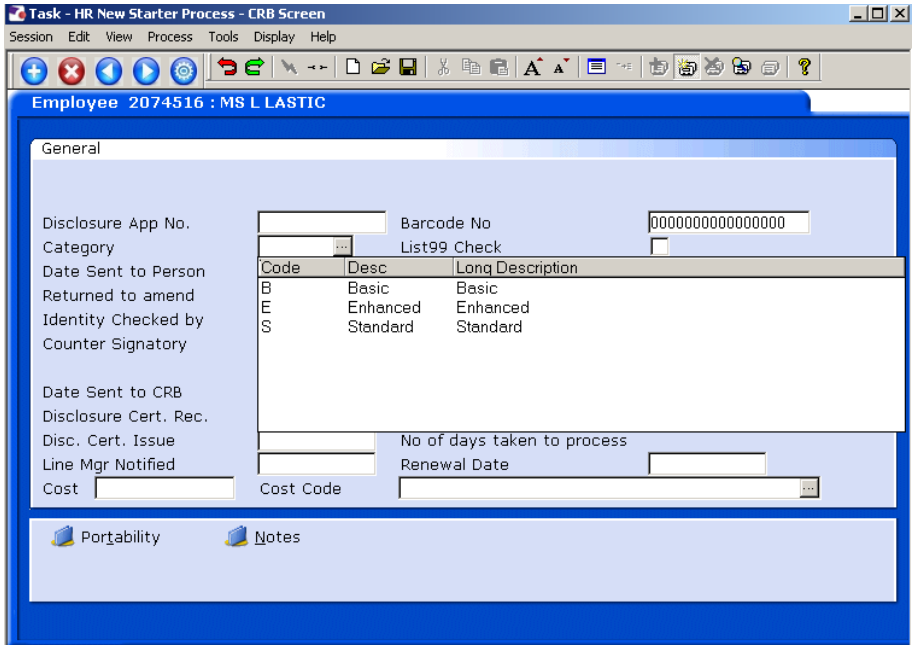


11.4 In the **Portability screen** click on **Exit**.

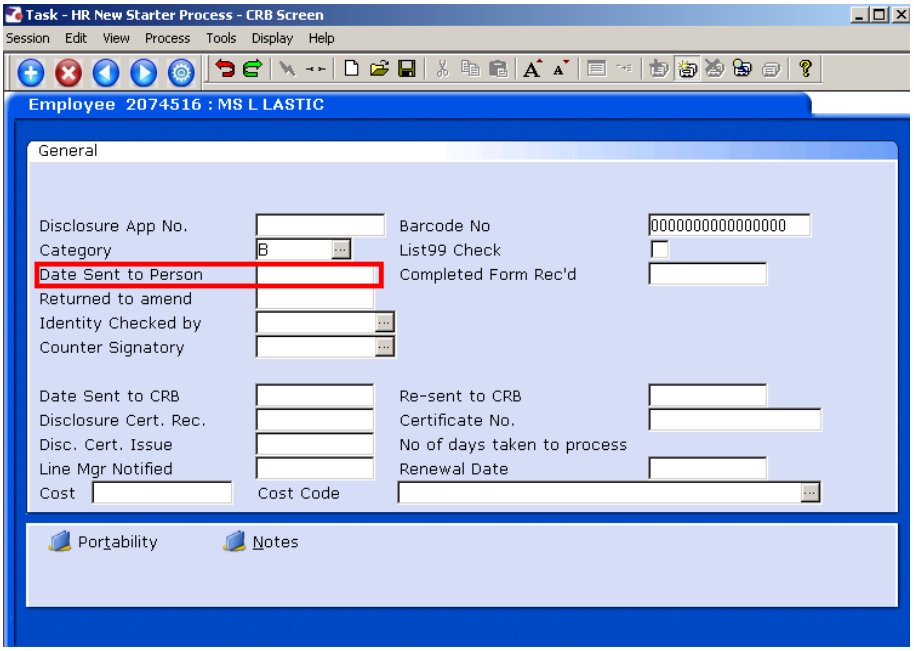
11.5 Enter the **Barcode No**

if known and press enter, otherwise enter past the field and leave blank.

11.6 **Mandatory:** Select the **Category** code from the drop down menu:

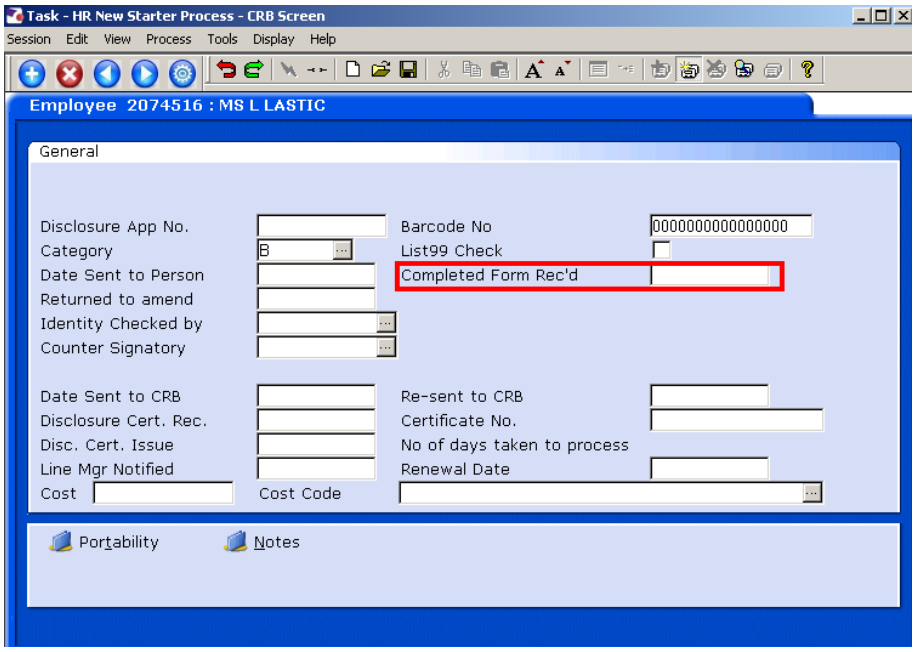


11.7 Enter through to the '**Date Sent to Person**' field and enter the date the form was sent to the individual for completion and press enter:

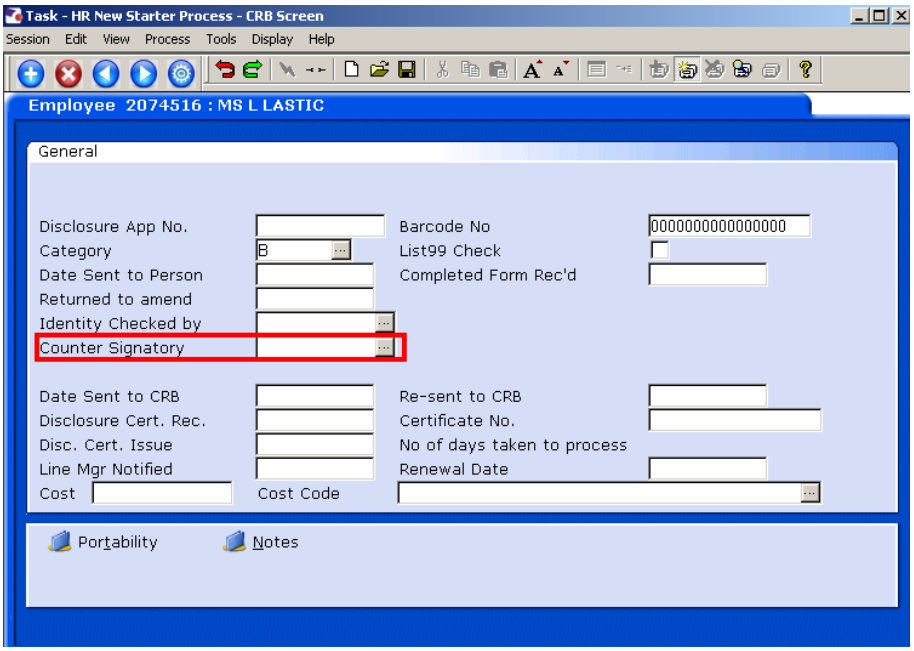


11.8 Enter the date that the completed CRB form was received back in the **Completed Form Rec'd** field

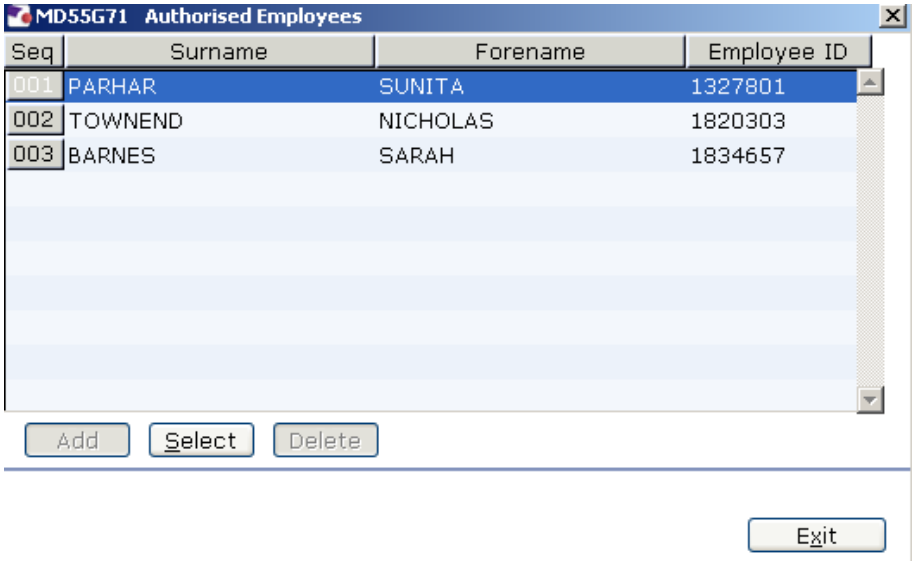
- This can not be a future date



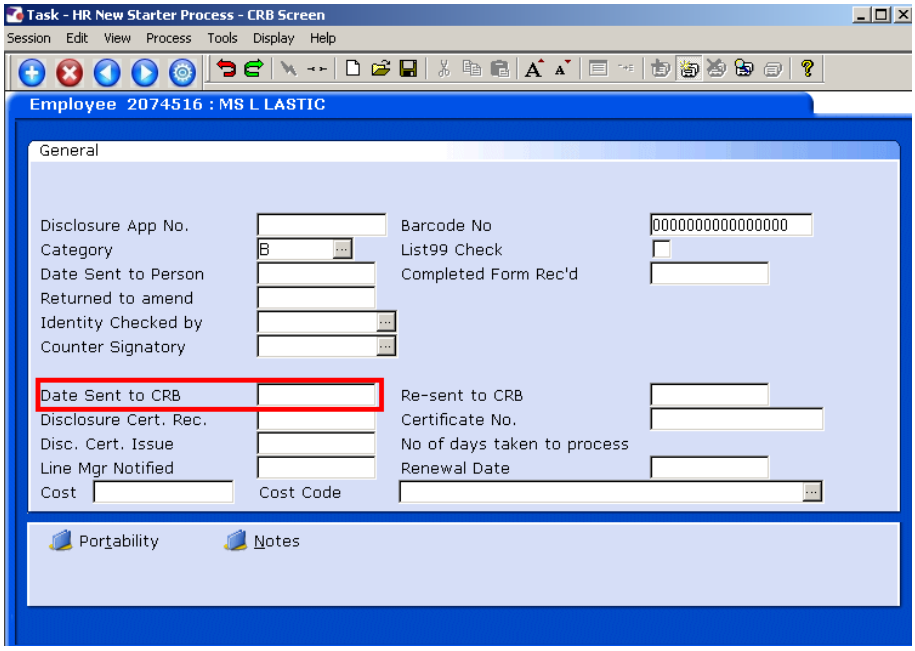
11.9 Enter through the fields down to the **Counter Signatory** field **Mandatory:** Window in on '**Counter Signatory**' to select the HR person responsible for counter signing this CRB:



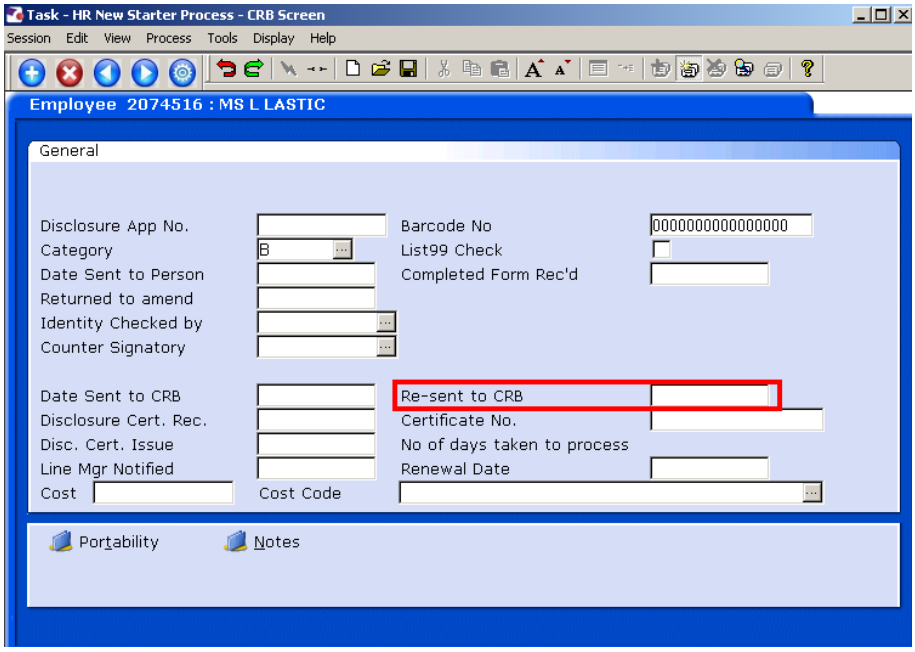
11.10 Select the person responsible for signing the CRB application



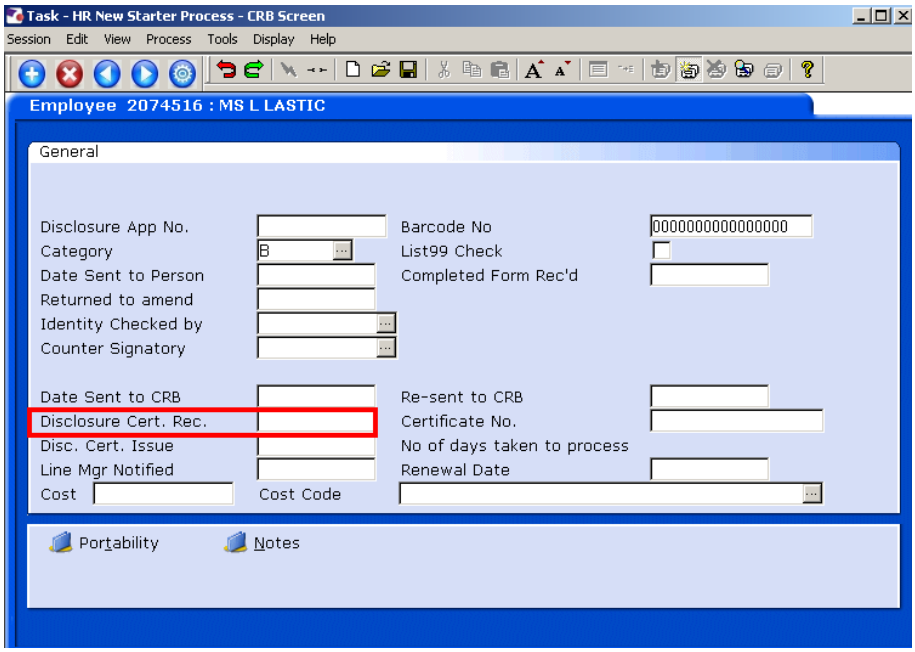
11.11 Enter the date the application was sent to the CRB in the **Date Sent to CRB** field:



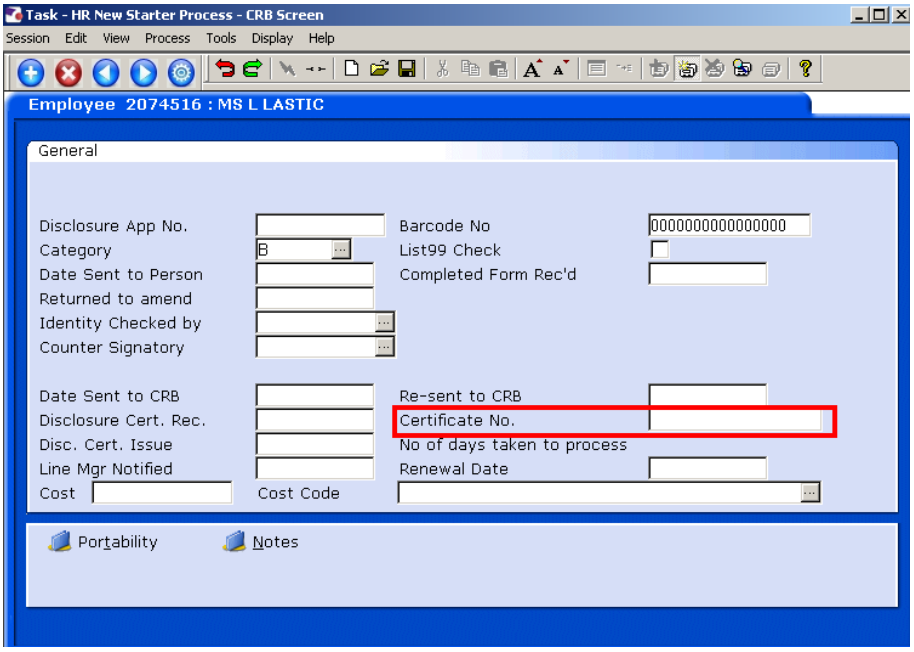
11.12 If the form needed to be resent to CRB enter the date the form was re-sent to the CRB otherwise enter past the field and leave blank:



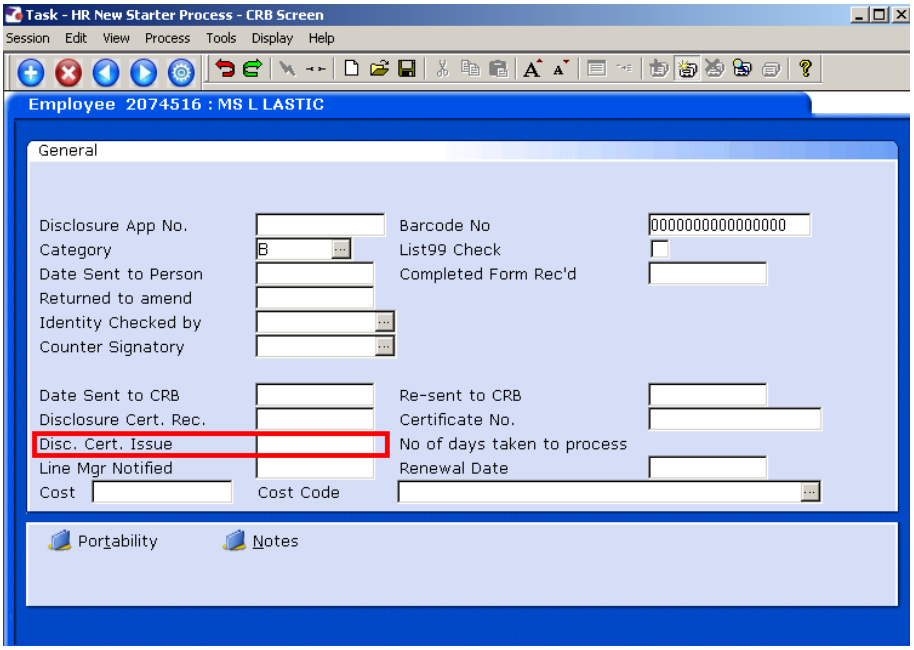
11.13 **Mandatory:** Enter the date that the Disclosure Certificate was received in the **Disclosure Cert Rec**. field and press enter.



11.14 **Mandatory:** Enter the certificate number

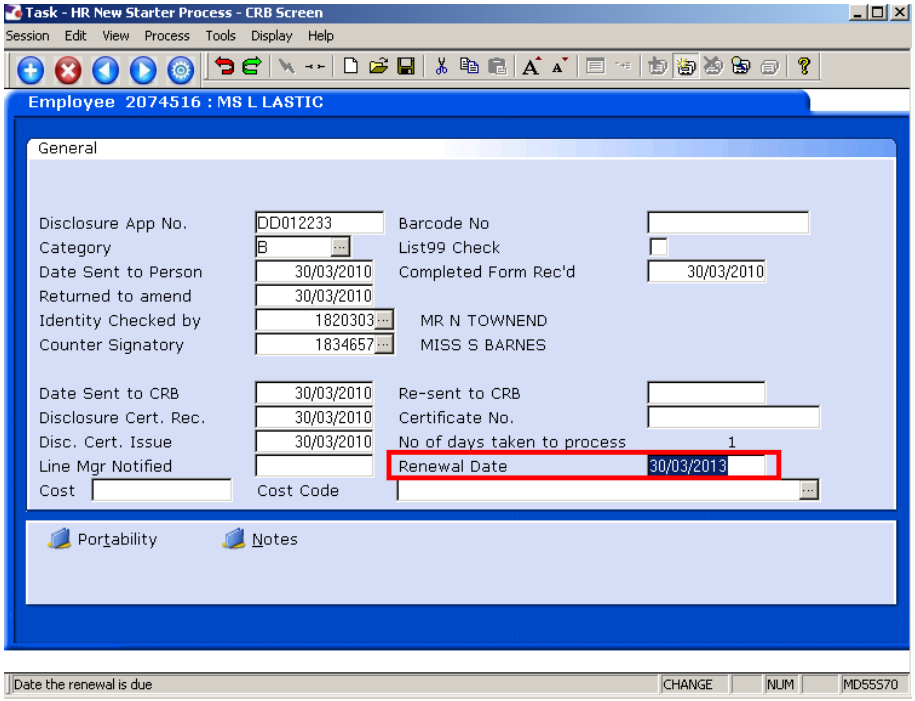


11.15 **Mandatory:** Enter the **Disclosure Certificate Issue Date** and press enter

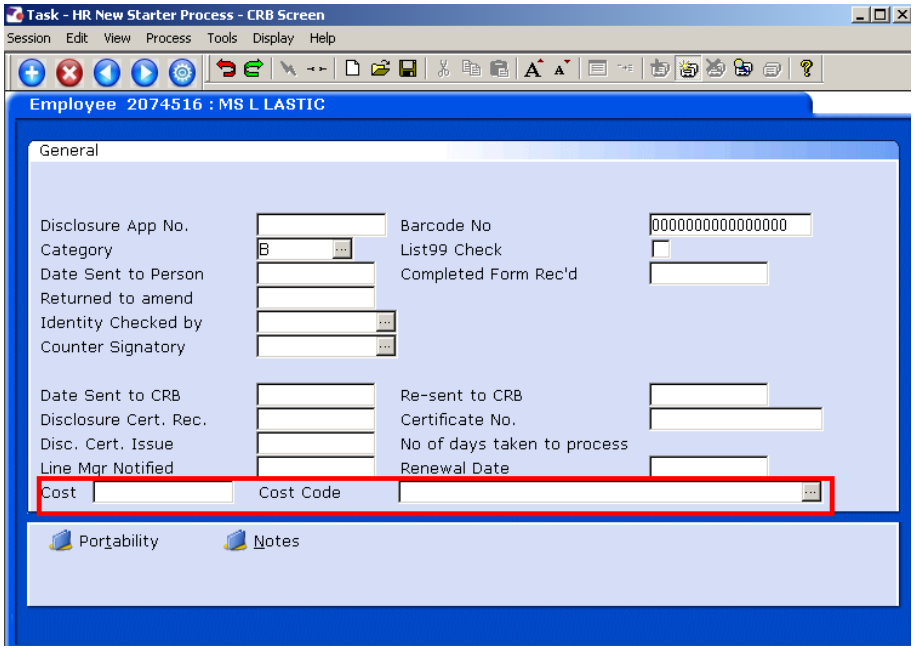


11.16 Enter the date the Line manager/Sch Manager was notified (if appropriate) or enter through.

11.17 The **Renewal Date** will automatically be populated with a 3 year expiry date:

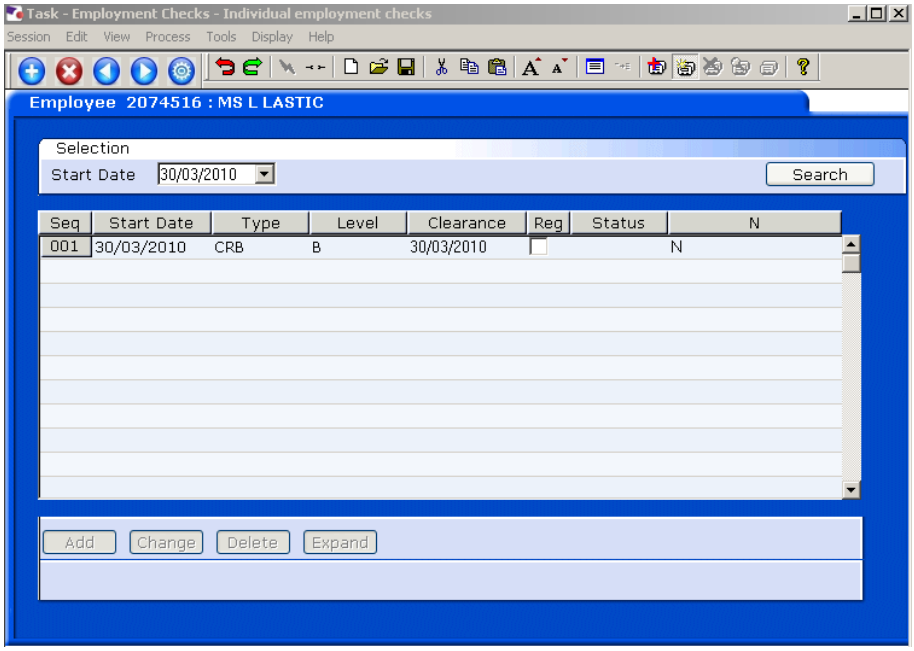


11.18 If you have the cost and cost code, these can be entered here:

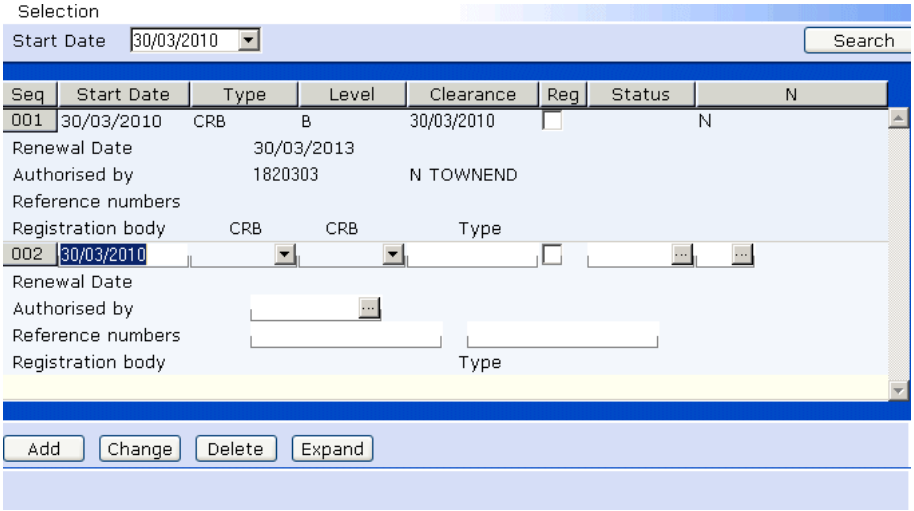


11.19 Click on to move to the next data entry screen.

12 Adding an ISA check

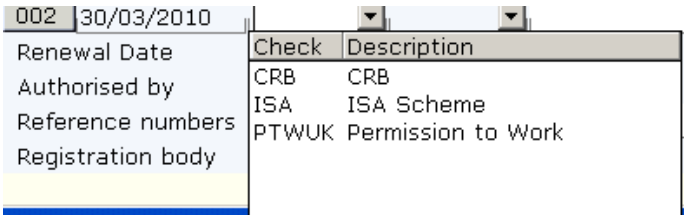


12.1 Click on **Add**

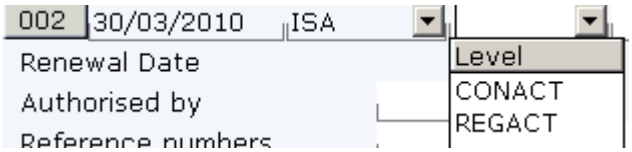


12.2 In the **Start Date** field enter the date the check was made and press enter.

12.3 In the **Type** field, click on the arrow and select **ISA**:

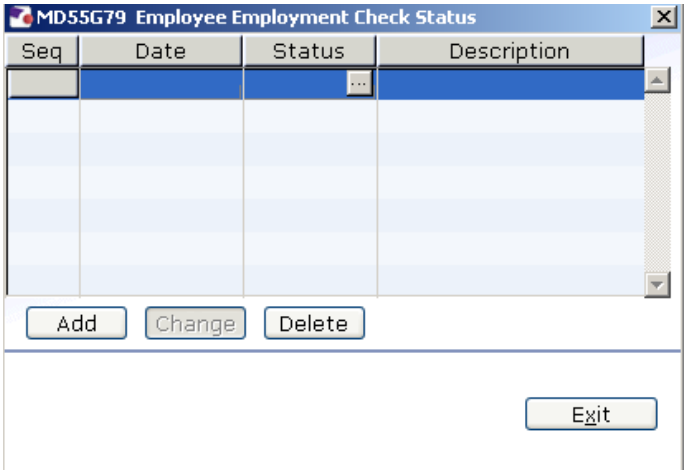


12.4 Enter through to the **Level** field and click on the arrow and select either **CONACT** for the level of Controlled Activity and **REGACT** for Regulated Activity:



12.5 Enter through to the **Clearance** field and enter the date the clearance was made, this should be the same as the **Start Date** in step 2.2, press enter

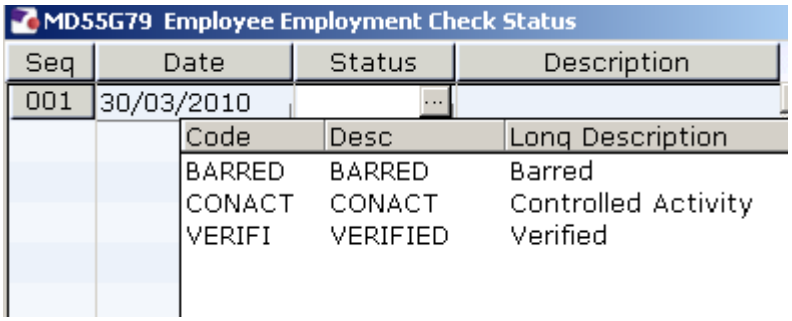
12.6 Window into the **Status** field



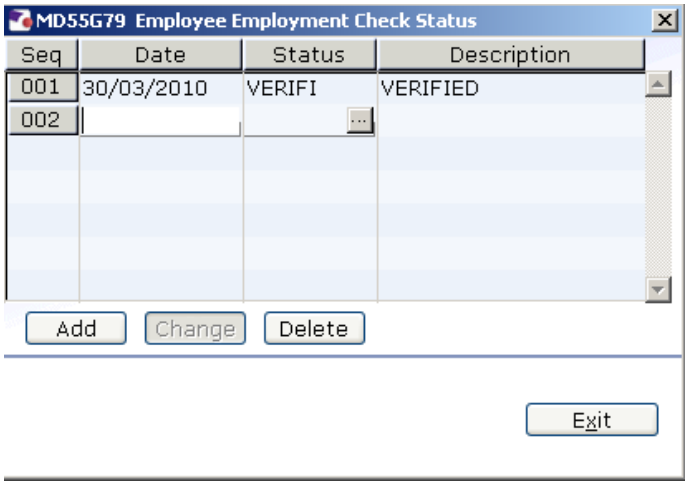
12.7 Click on **Add**

12.8 Enter the status start date in the **Date** field and press enter

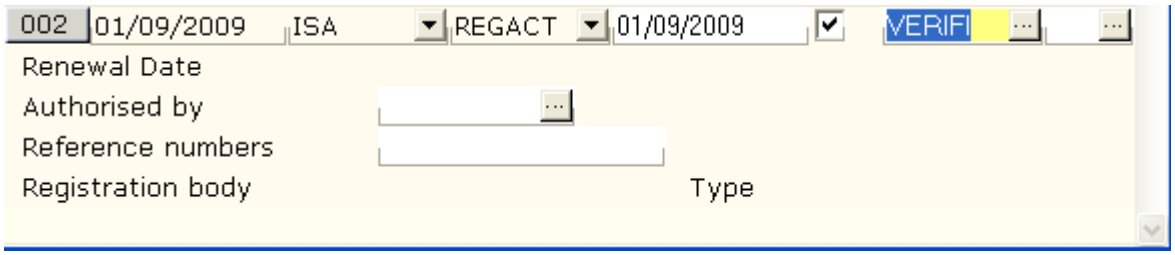
12.9 Window into the **Status** field



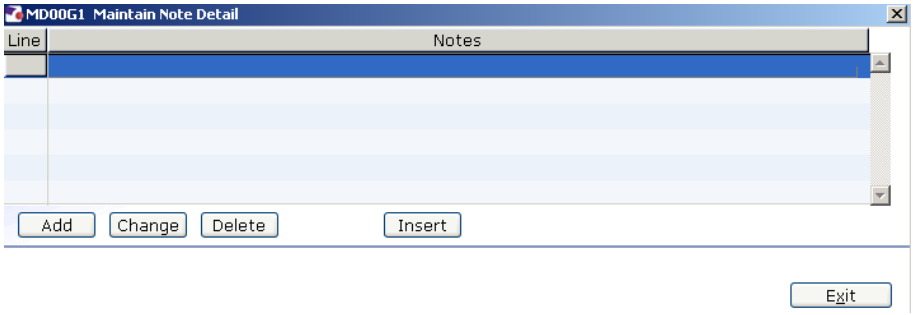
12.10 Select the current status of the ISA check e.g. Verified



12.11 Press Enter and click on **Exit**

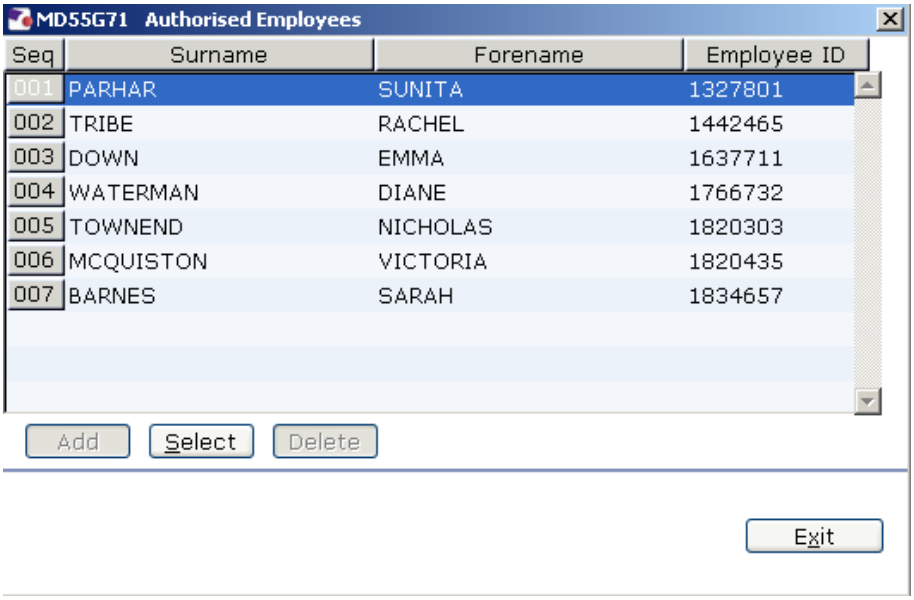


12.12 Enter through to the **N** (notes) field. If you have any additional notes you want to record against this check then window into the notes field, click on **Add**, enter the notes and then **Exit**



12.13 Otherwise enter past the notes field

12.14 Window into the **Authorised By** field

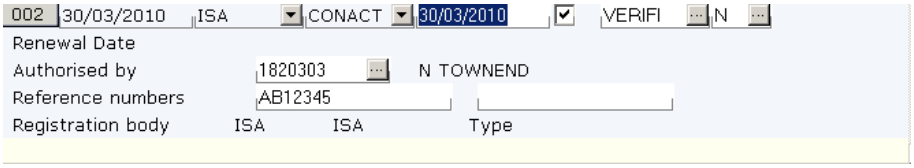


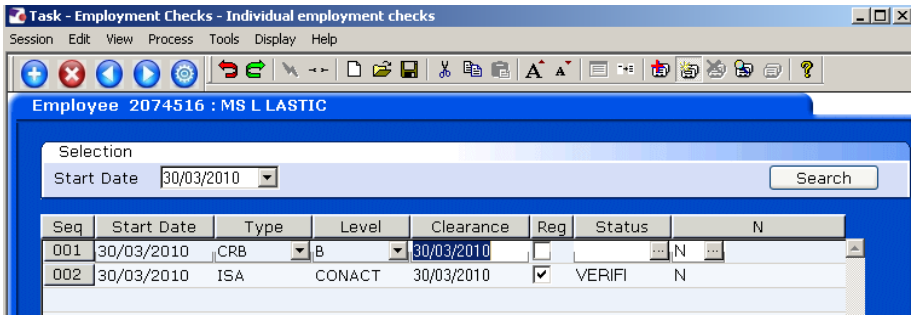
12.15 Select who the ISA Check has been authorised by clicking on the name

12.16 Press Enter

12.17 Enter the **Reference number** of the check and press enter

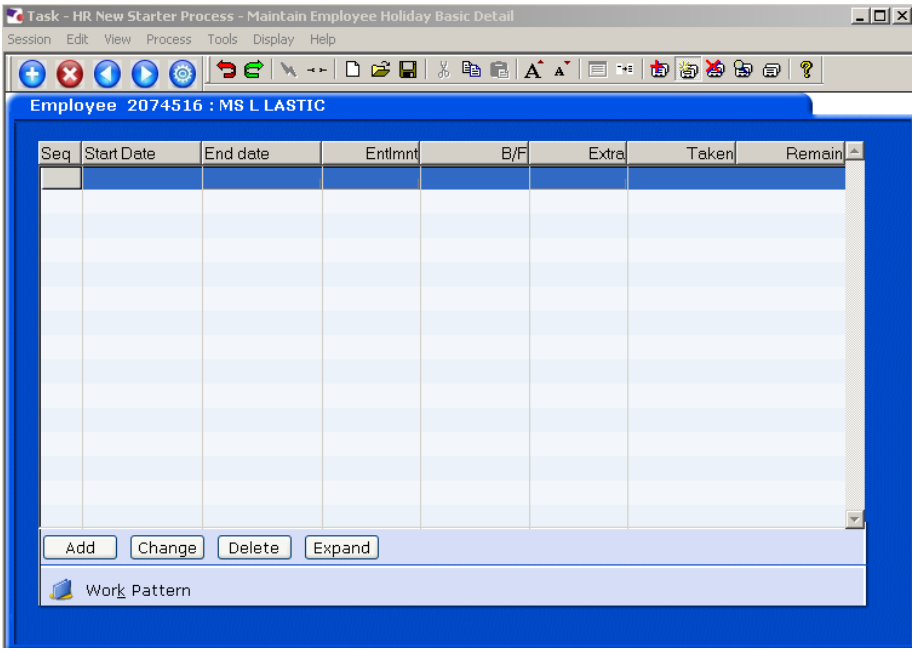
12.18 The row of data is completed:





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

13 Holiday Entitlement



13.1 Click on **Add** if the employee is to receive a holiday entitlement.

13.2 Enter the employee's start date into the **Start Date** field and press **ENTER**. (this field will default to 1st October, overwrite this with the employee's actual start date).

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

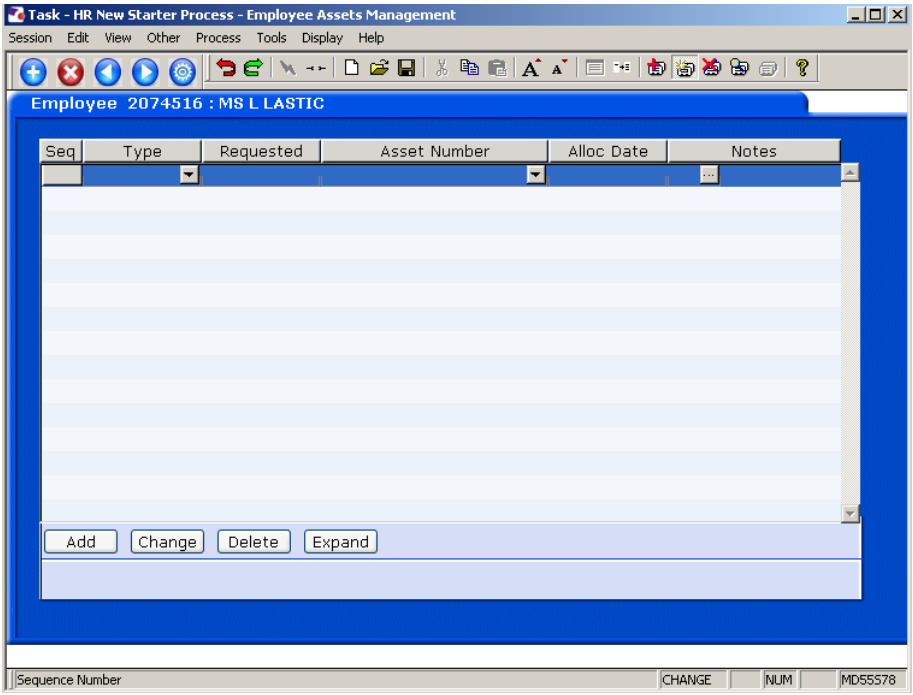
13.3 In the **End Date** field, enter the end date of the current leave year (always 30th September) unless the employee is on a fixed term contract which is due to expire before this date – in which case enter the end date of the FTC. Then press **ENTER** through the remaining fields.

13.4 The "**Entlmnt**" field should automatically populate.

ⓘ If there is no entitlement the employee is either rightly attached to a service condition (see Current Post Holding) where they have no entitlements or they are attached to the wrong service condition.

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

14 Asset Management



14.1 Click on **Add** if the employee is to be assigned particular assets e.g. a laptop

14.2 Select the asset type from the drop down list in the **Type** field.

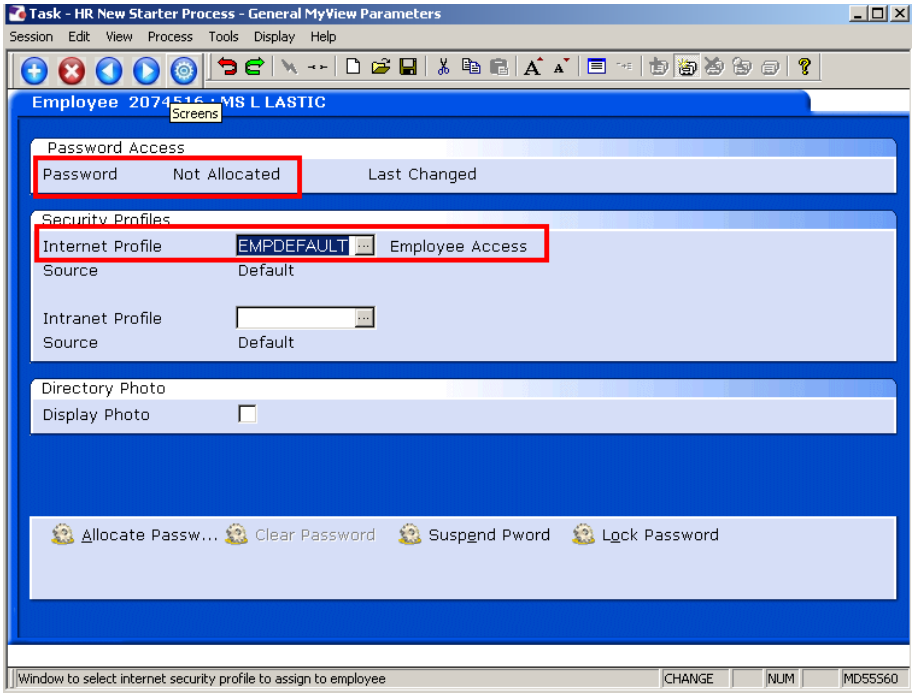
14.3 Press **Enter** and amend the date requested if necessary.

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

14.4 Enter through the rest of the fields on the row.

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

15 General MyView Parameters data entry screen



This screen is where you set up the MyView profile that the employee should be allocated.

ⓘ The **Password** field will read “Not Allocated” for a new starter.

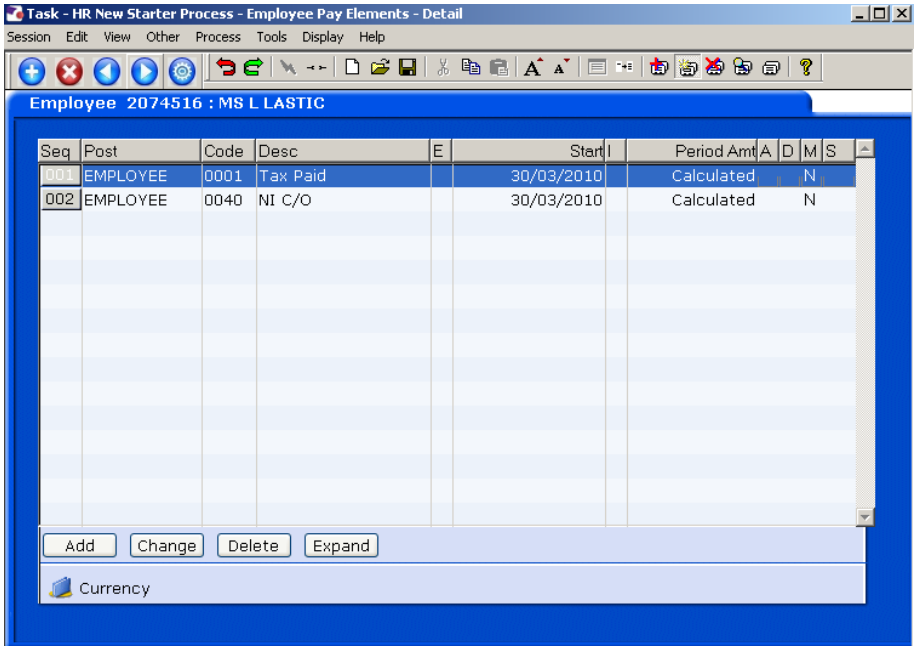
15.1 In the **Profile** field, select the relevant MyView profile for this employee (do <u>not</u> leave this set to the default of EMPDEFAULT). Which MyView profile the person should be on will depend on whether they are a line manager or not and also on how their particular Academic Unit / Department is using MyView.

ⓘ For details about the different valid MyView profiles, please refer to the **MyView access explained** document which can be found on the following webpage: http://www.soton.ac.uk/myview/myviewaccess.html

15.2 You do not need to issue a MyView password as the person is not yet an employee and has therefore not “Subscribed”. When a new starter begins and receives their University Id and Password via Subscribe, they will be able to gain access.

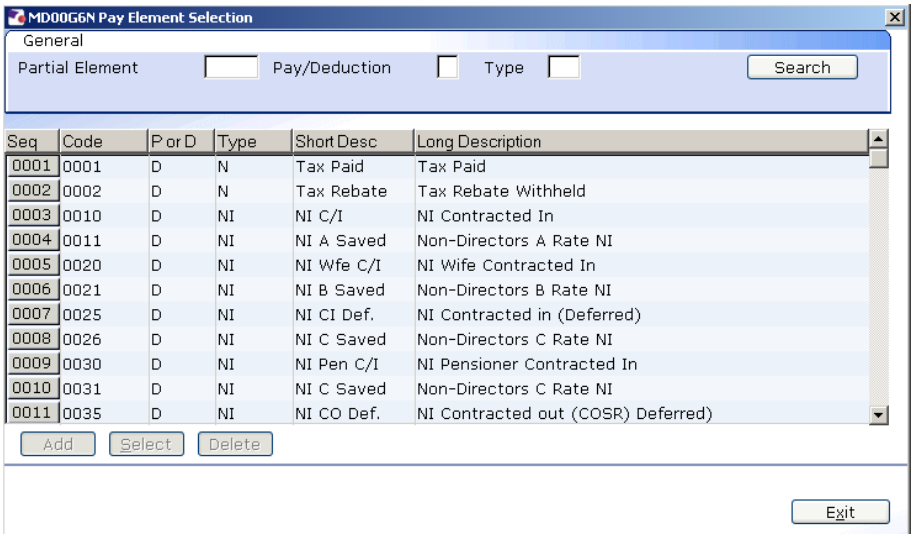
15.3 Click on to move to the next data entry screen.

16 Fixed Pay Elements Summary data entry screen



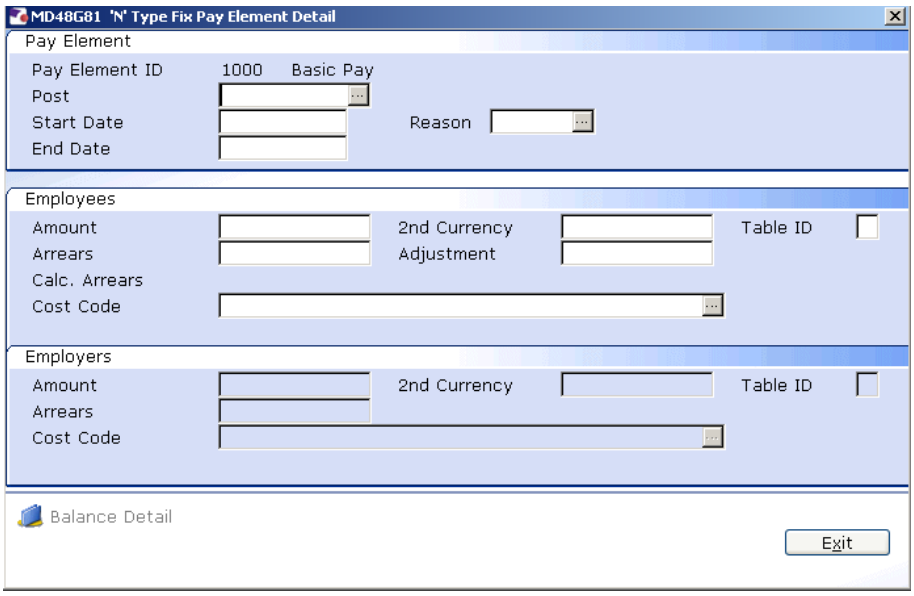
16.1 Click on **Add**

16.2 **Window in** to the **Pay Element** field and **Enter** through all the fields to display the list of pay elements.



16.3 Select the required pay element (Code **1000** is **Basic Pay**, codes 0001 – 0999 are standard ResourceLink pay elements, 1000+ are UoS specific). The following data entry screen is displayed:

ⓘ If the employee is to be paid a salary of a non spinal amount you will need to enter the PE **2000-Basic Pay Non Spinal** and enter an amount, rather than using PE 1000.



16.4 **Window in** to the **Post** field. A list of the employee's posts is displayed. Select the required post this PE is to be attached to.

16.5 Press **Enter** to move through the **Start date**.

16.6 **Window in** to the **Reason** field and select the reason for the PE.

💣 The reason MUST be the same as was entered at Post Holding.

16.7 Press **Enter** through the **End Date.**

16.8 If the PE you are entering requires a specific amount (e.g. 2000-Non spinal Salary) to be attached to it, enter this in the **Amount** field. You will need to enter the **annual** amount, the system will then divide this by 12. For PE 1000 – Basic Pay this is not required.

16.9 Press **Enter** to move through the remaining fields.

16.10 The Fixed PE Screen will be updated.

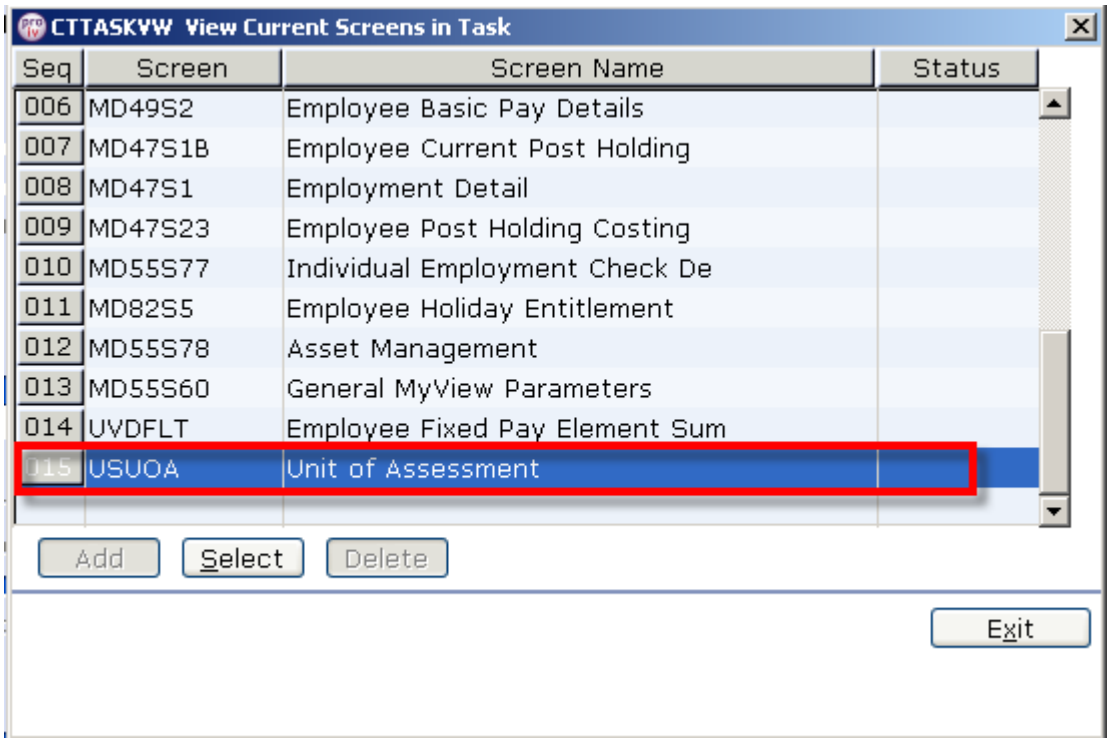
16.11 Click on **Add** and repeat this process for each Fixed PE the employee is to continuously receive each month. E.g. Market Supplements.

16.12 Click on to save the changes.

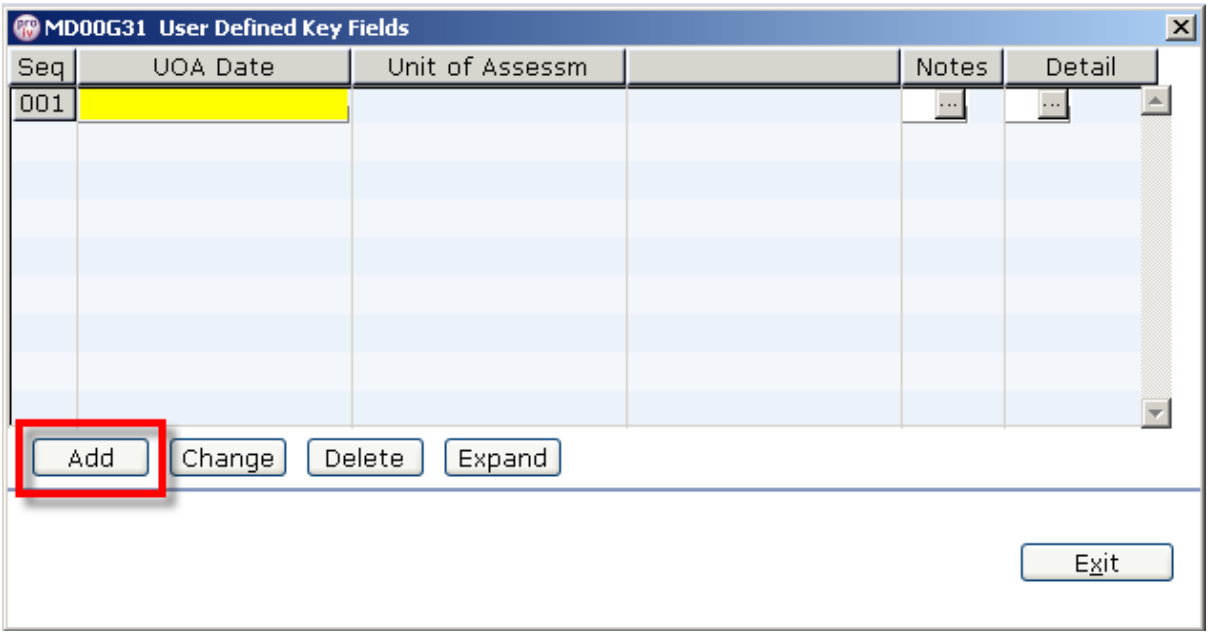
17 Unit of Assessment

17.1 Select to display the screens available within this Task.

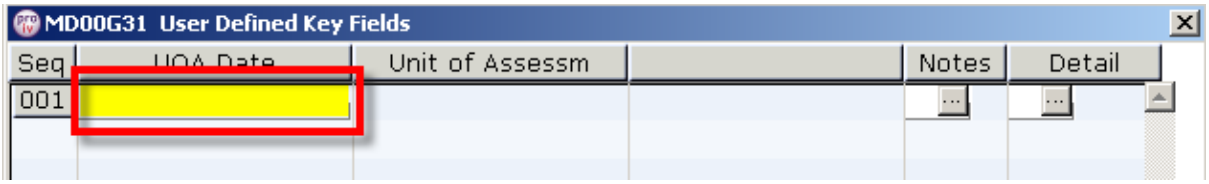
17.2 Click on Unit of Assessment and SELECT



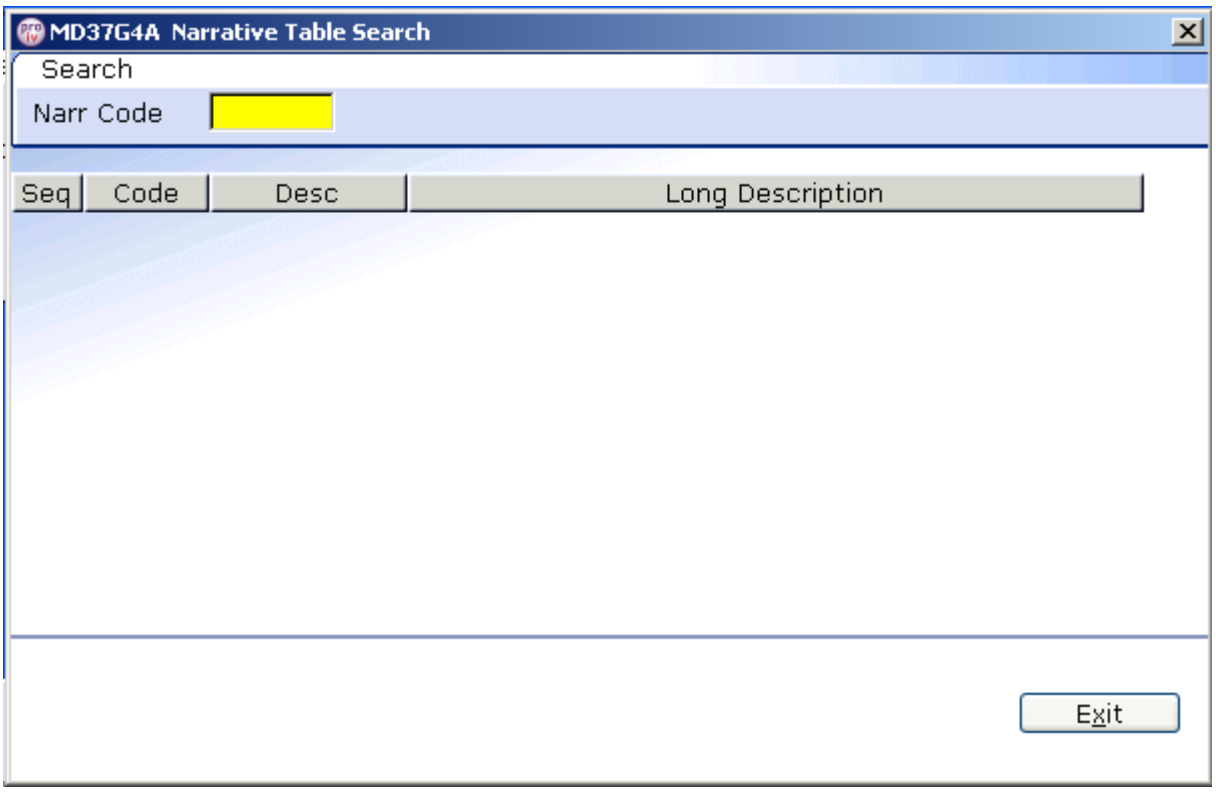
17.3 Click on **Add** to enter the UoA Date.



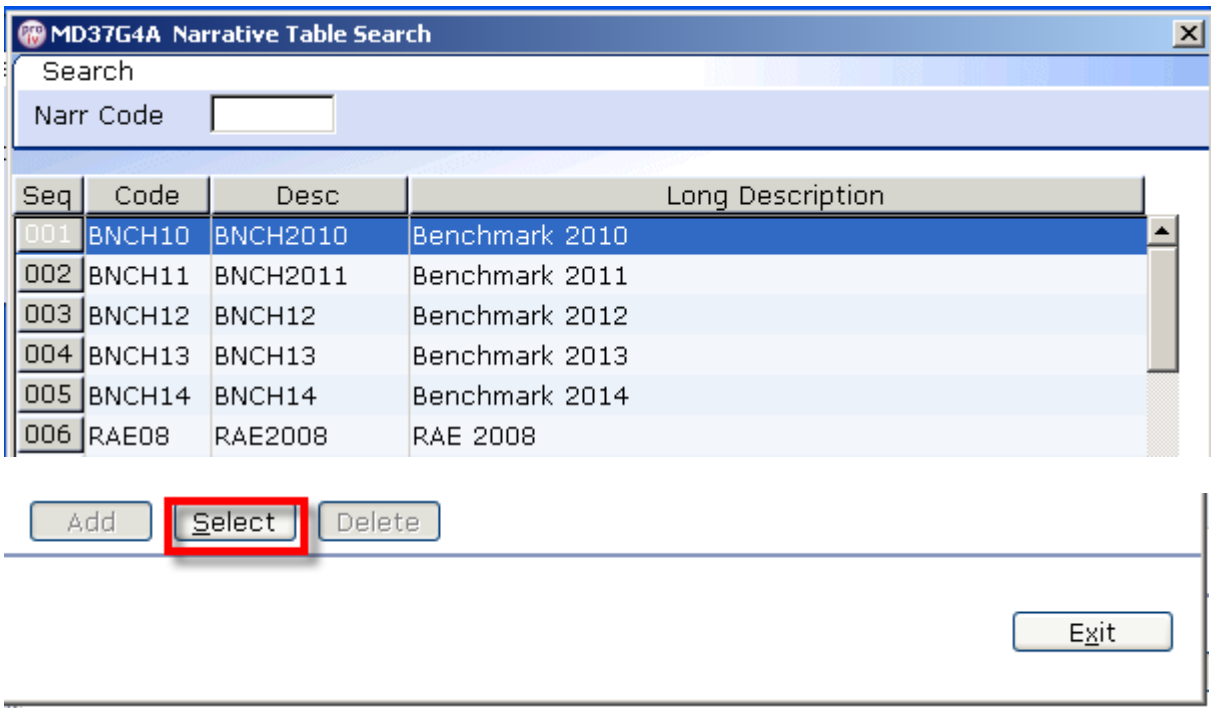
17.4 Double click in the UOA Date field



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

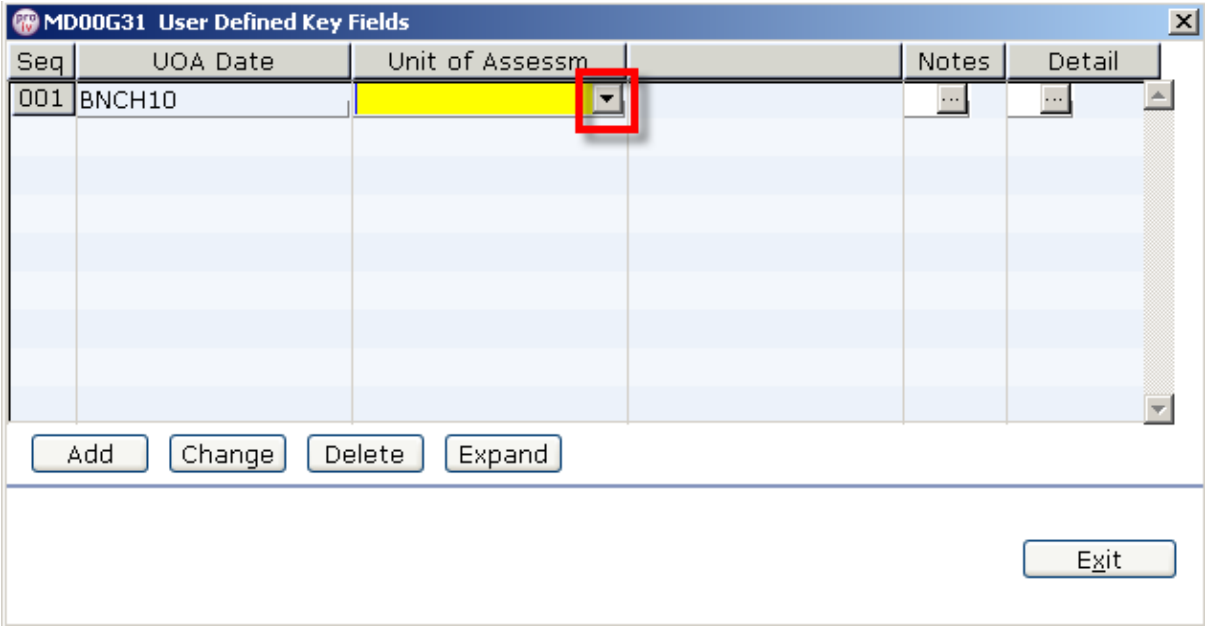


17.6 Click on the appropriate description and click **SELECT**

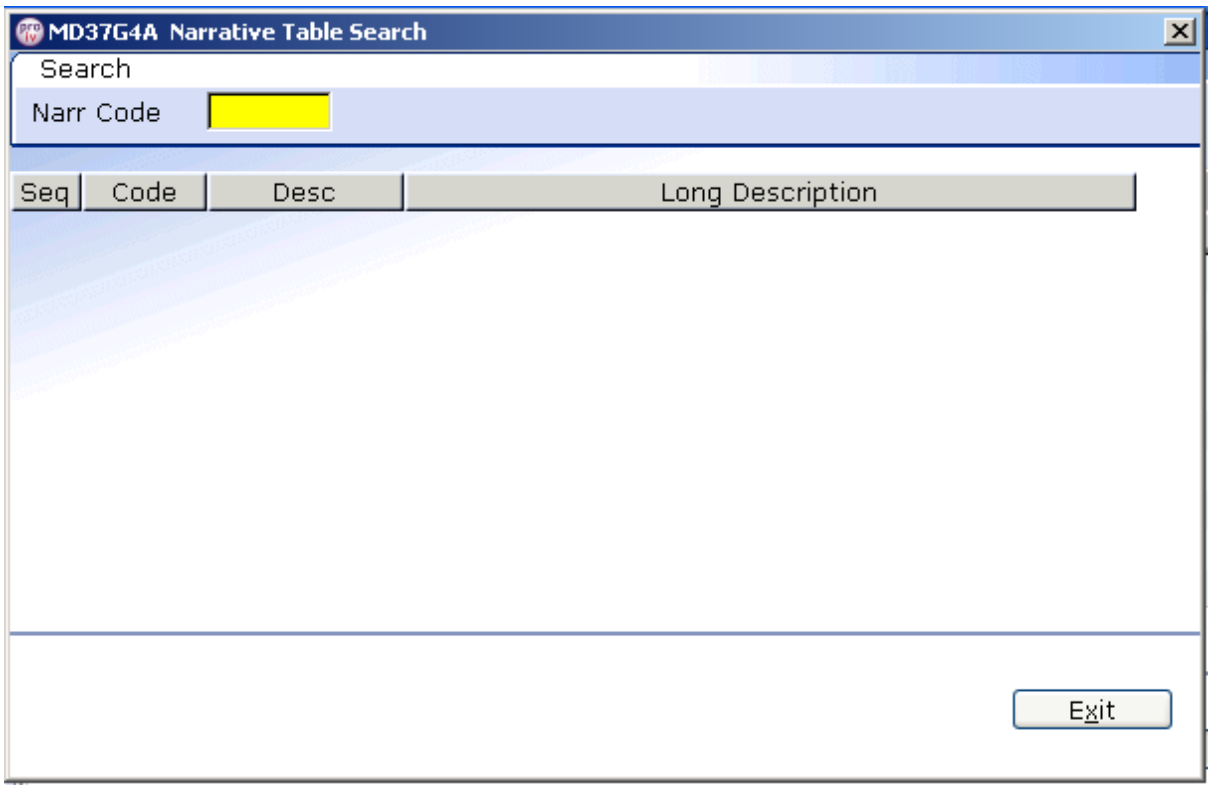


All Units of Assessments should be entered against UoA Date: Benchmark 2010 until advised otherwise by the HR Systems Team.

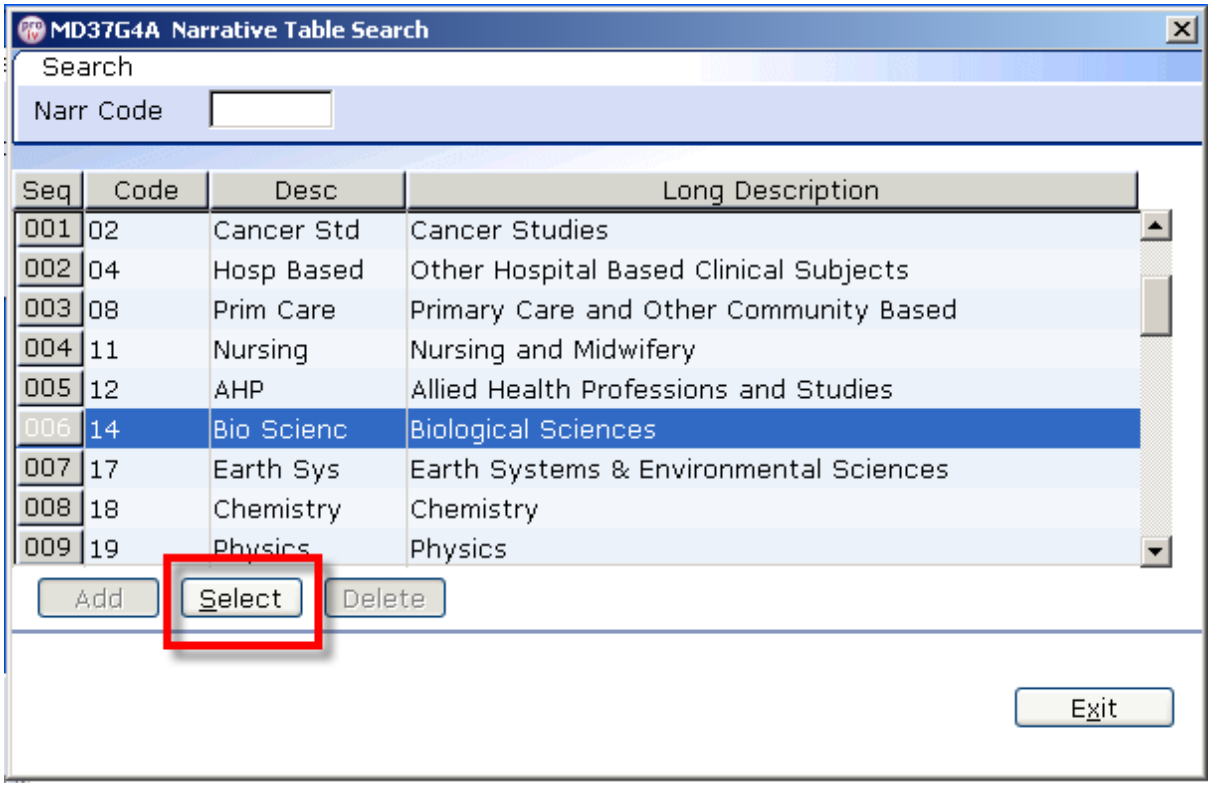
17.7 Within the Unit of Assessment field click on the drop down icon to display the data available for selection



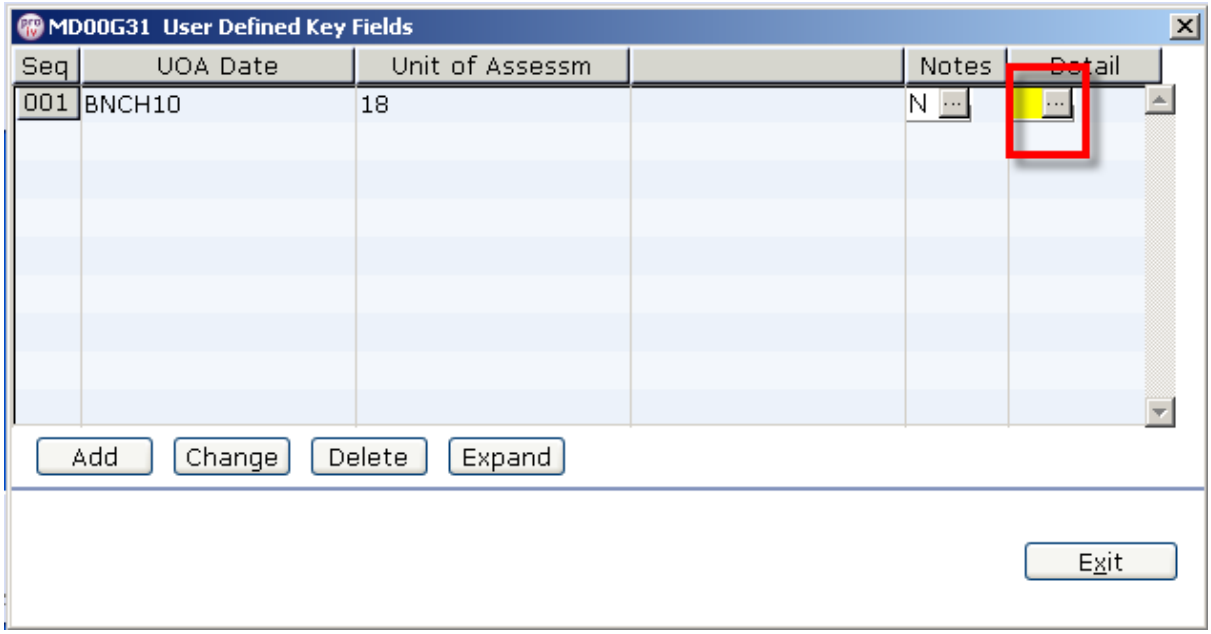
17.8 Press ENTER



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

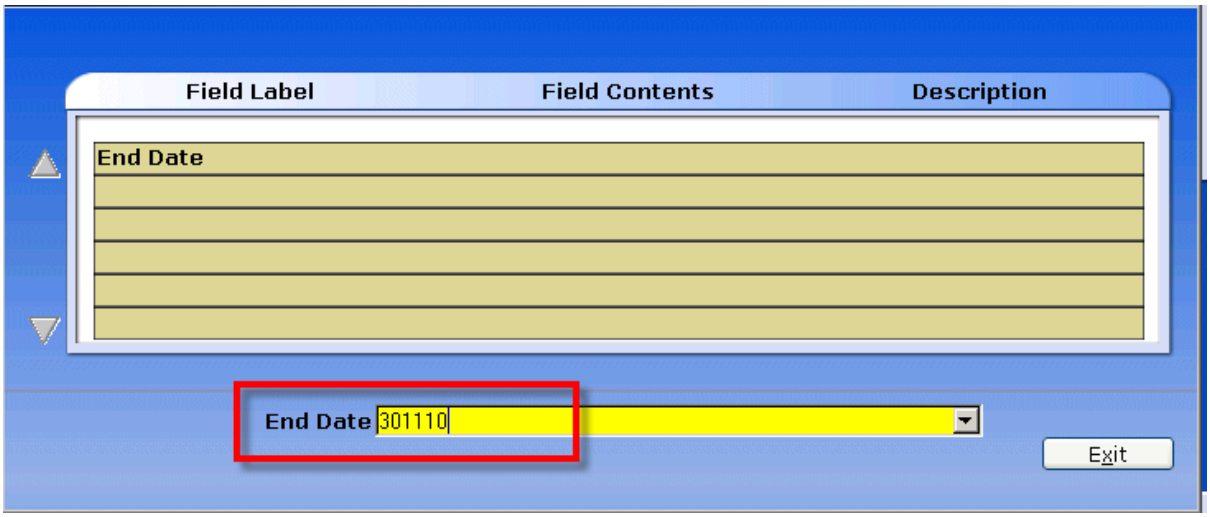


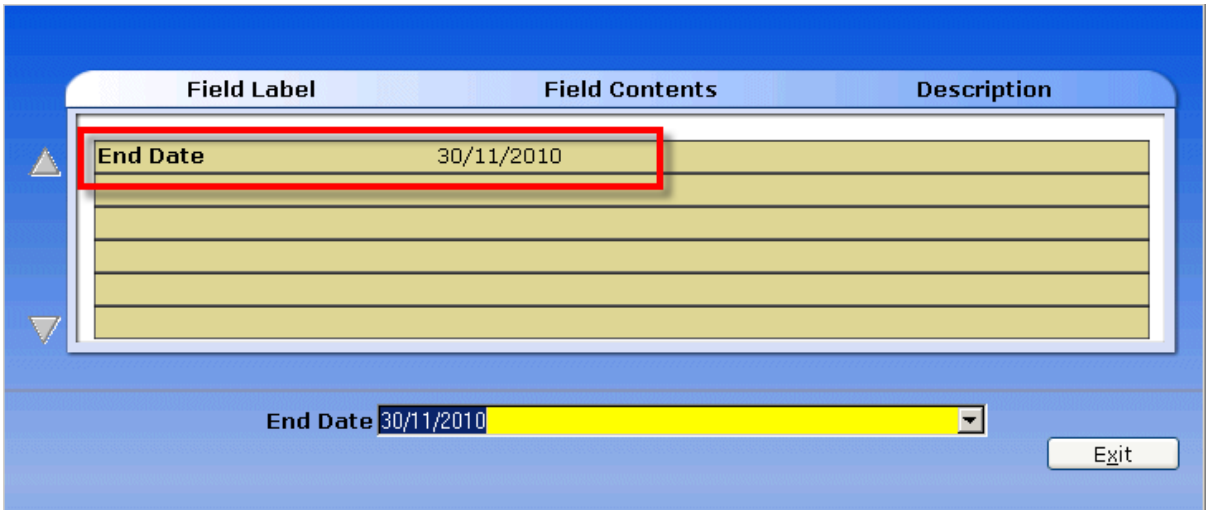
17.10 If known enter Unit of Assessment End Date by windowing in on the **DETAILS** field.



End Date details can be added at a later date

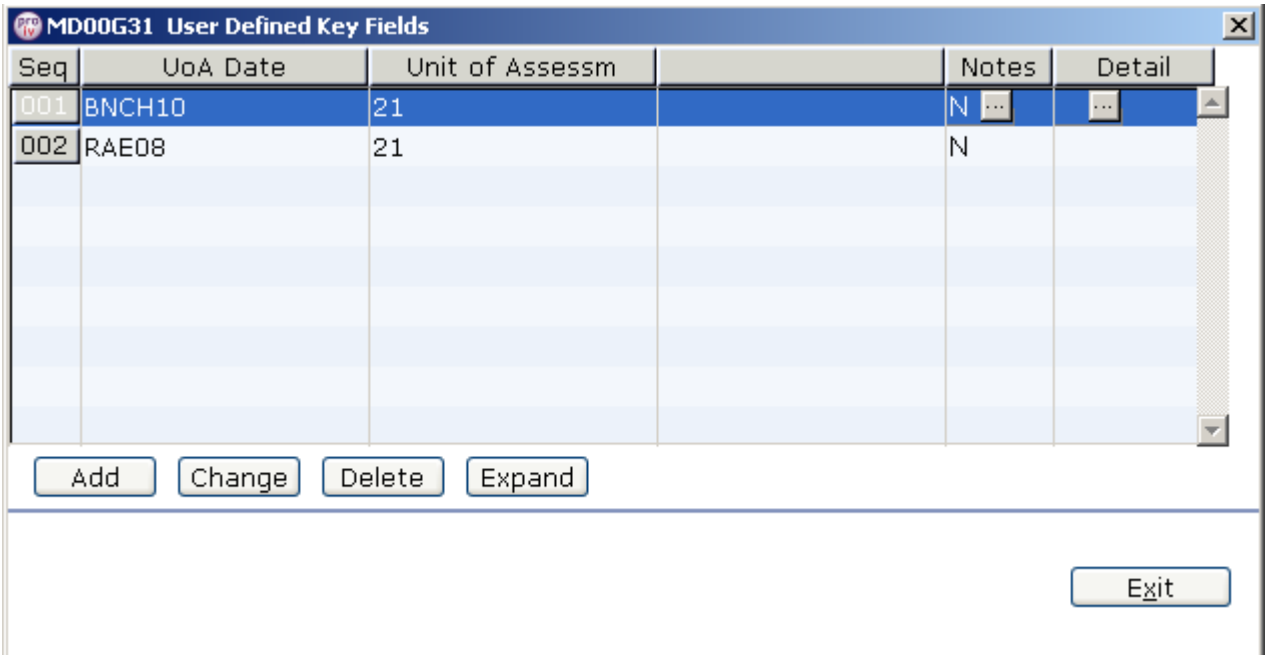
17.11 Type the End Date into the highlighted field and press **ENTER**





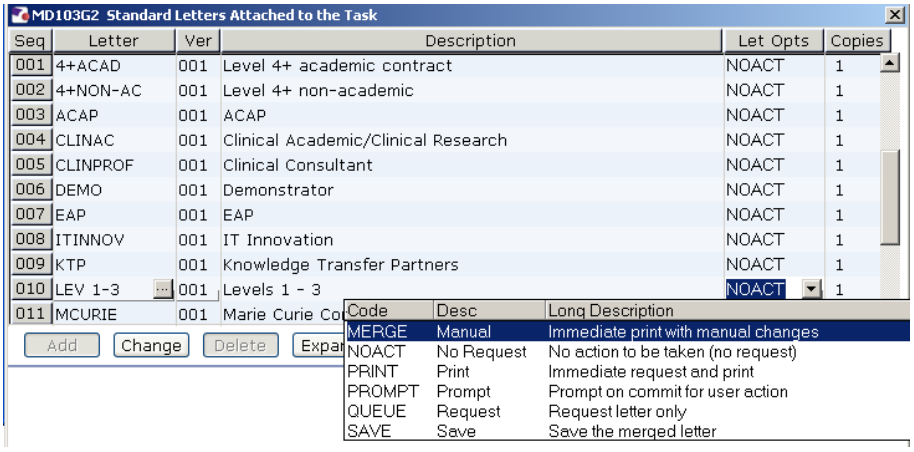
17.12 Click **Exit**.

17.13 Historical data will be maintained on this screen.



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

18 Standard letters



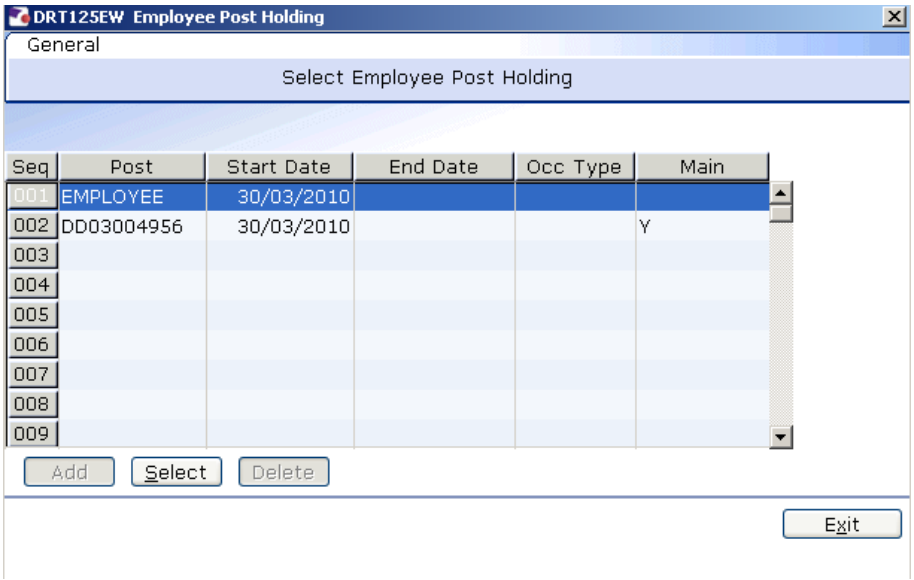
18.1 Click in the **Let Opts** field of the standard letter you want to produce

18.2 Click on the drop down and select **MERGE – Immediate print with manual changes**.

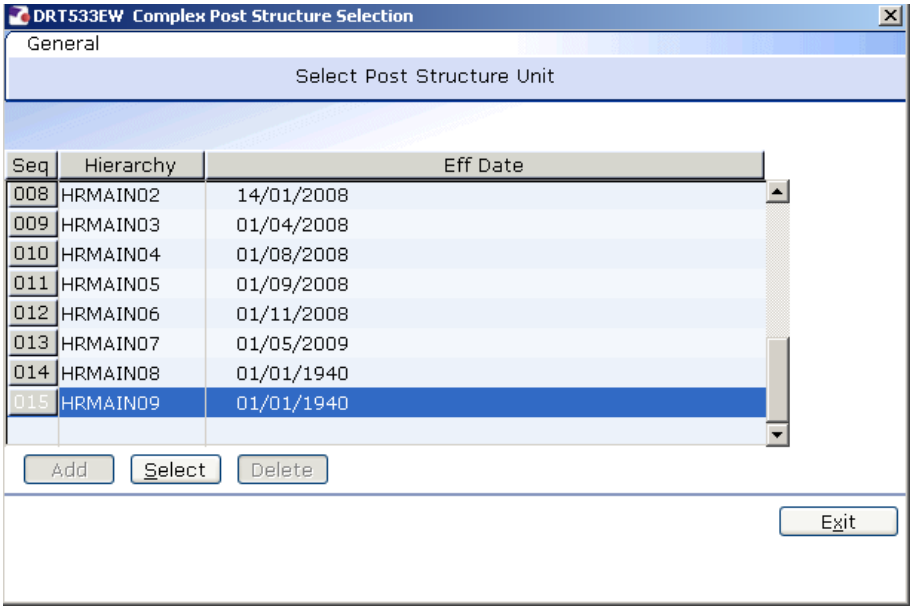
18.3 Click on **Exit.** A series of pop-up windows will appear, where you will need to select on the relevant information that should be pulled through to the contract.

18.4 If you are asked to select a version of the HR Main hierarchy always, select the most recent version.

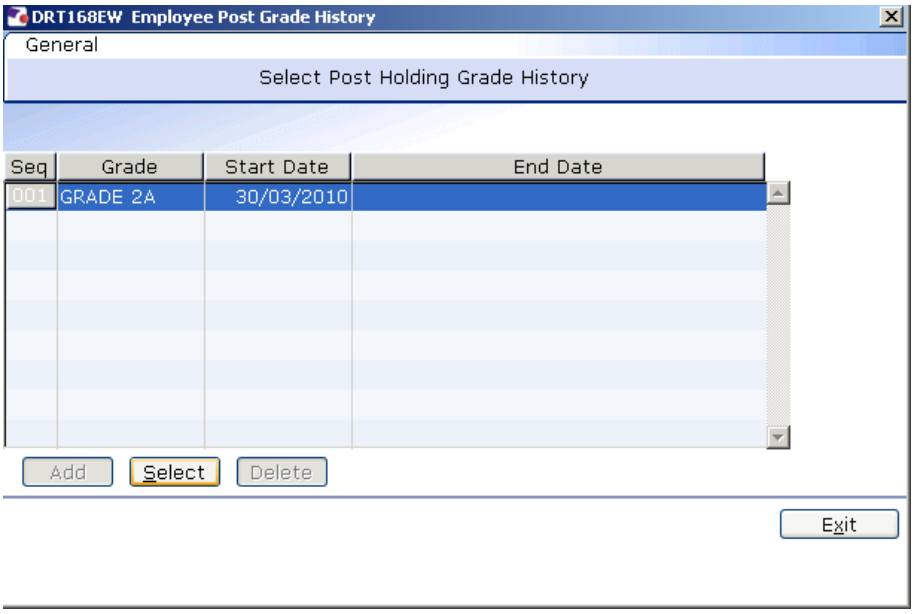
18.5 If the person has more than one post, ensure that you select the correct post relevant to this contract.



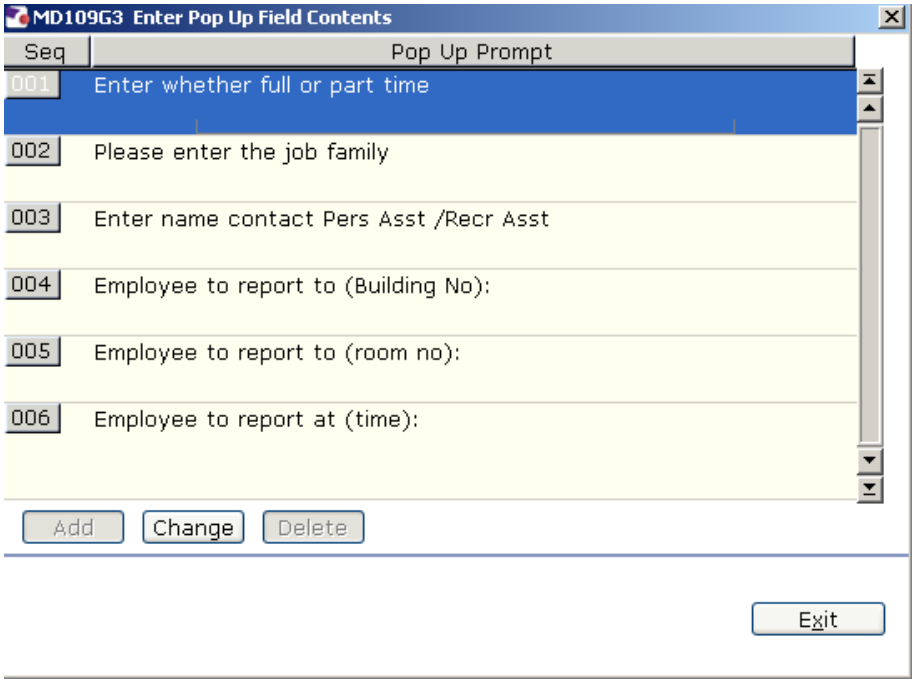
18.6 **Select the latest hierarchy**



18.7 Select the grade



18.8 If any of the pop-up windows do not show any rows of data, simply click on **Exit.**



18.9 Once you have progressed through all of the pop-up windows, the employee's letter should generate in **Word** at which point you will be able to check and amend it (if necessary).

- Please ensure you delete the highlighted sections in the contract where appropriate to the individual employee.

- Please only click on the Print button if you have one of the following HR printers set as your <u>default</u> printer:

  - PR744
  - PR745
  - PR756
  - PR747

Attempting to print a standard letter (contract) on any other printer will not only result in failure, but will also cause problems for other users.