UNIVERSITY OF
Southampton

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New Starter - Entering Fees / Casual Claim Forms

This Work Instruction describes the process of entering Fees / Casual claims onto ResourceLink.

> 💣 **It is vital that you thoroughly check whether or not the person who has submitted the claim form already has a ResourceLink record set up. Setting up duplicates records for the same individual causes lots of unnecessary work for Payroll**
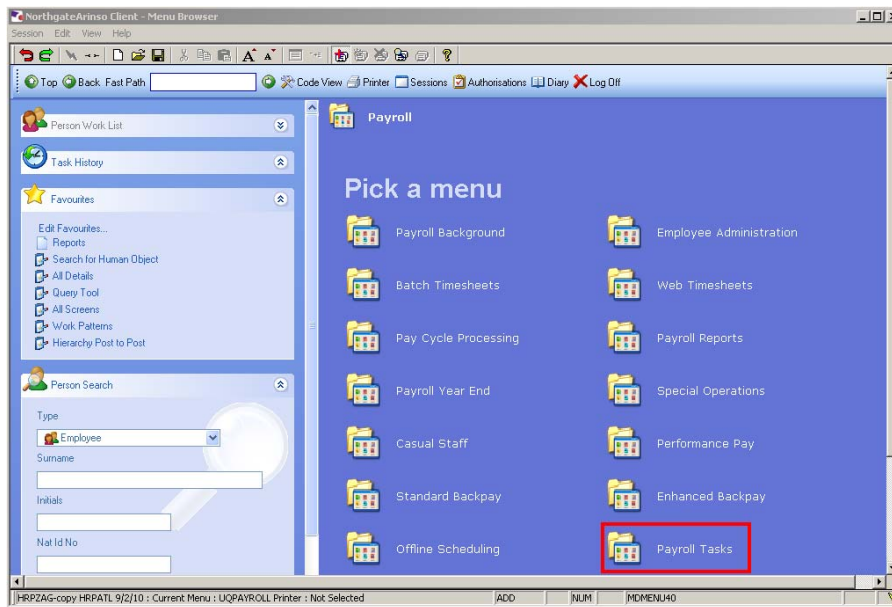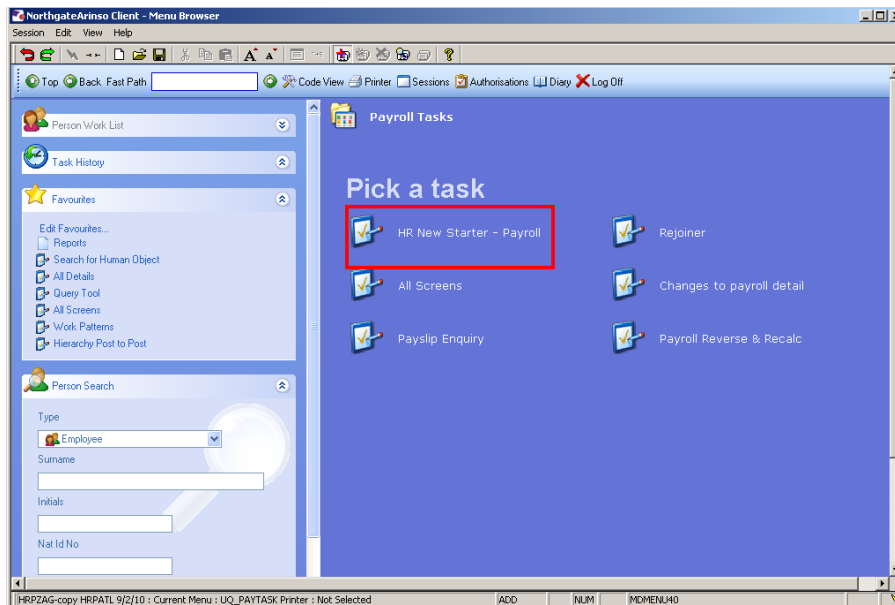
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1 Using New Starter Task

✹ This Section onwards assumes that TempBank Office have set up the individual's record on ResourceLink. If this hasn't happened, return the paperwork to the TempBank Office.

1.1 From the ResourceLink main menu screen, open the **Payroll Tasks** folder:

1.2 Open the **Fees New Starter Payroll** task:

1.3   Open HR New starter – Payroll Task

1.4   Screen 1 Personal Details. Check personal details are correctly entered.

1.5   Ensure Pay Point is added in User Field

1.6   The HR New Starter - Payroll Task has the following screens in it:

ⓘ The Temp Bank (or whoever initially set up the record) will have completed the relevant fields on the **Personal Details** screen, including the person's home address and will also have added the person's first fees / casual post in the **Employee Current Post Holding** screen.

ⓘ The following sections describe what you now need to do to complete this fees / casual form

2   The Employee Basic Pay Details screen

2.1   It should already have **PSUB3** in the **Pay Group** field, but if it doesn't, do window in and select PSUB3.

2.2   Change the **Pay Method** option to **BACS** (unless the individual does not have a bank account and therefore needs to be paid by cheque).

2.3   Enter the financial institute details by clicking on the **Fin Inst Det** button at the bottom of the screen.


2.4   Enter the bank sort code in the **Sort Code** field and press **Enter.**

2.5 Enter the individual's account number in the **Account No** field.

2.6 The **Account Name** will automatically populate with the person's name.

2.7 Click on the **Exit** button.

2.8 Click on the **Next** button to continue to the next screen.

3　The Current Post Holding screen

ⓘ　The Temp Bank Office will have added the person's first post, but you might need to set up a new row for the current claim you are processing.

3.1　To add a new post, click on the **Add** button
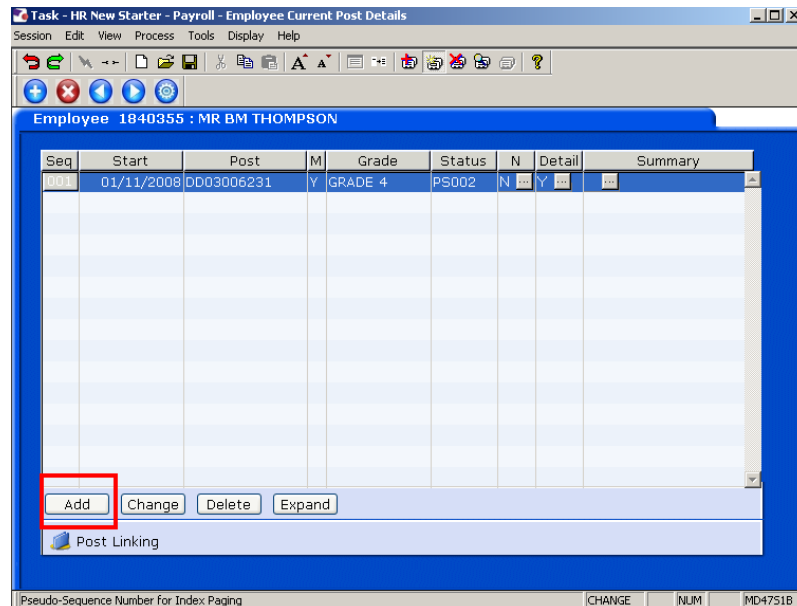
3.2　Enter the date that the claimant started working in the fees / casual post

ⓘ　Enter all dates in the format **ddmmyyyy**　(e.g. 15042008 for 15th April 08)

3.3　Enter the relevant post in the **Post** column

3.4　Press **Enter**.

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

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

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

3.7 Select the appropriate reason for this New Starter. In most cases this will be **SG005- Additional Post.**

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

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

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

3.10   **Window in** to the **Service Cond ID** field:

The start date of the post will display; press **Enter** three times to pull through the Service Conditions. If you get the following pop-up message, click on **OK:**

3.11   Click **Exit**. to return to the Condition tab.

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

3.13   Click on **Add**. [Add]

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

3.15   Select the relevant **Position Status** from the list, e.g. **Casual Staff**, etc.

3.16   Press **Enter** to move through the remaining fields and click **Exit**. [Exit]

💣   NB: the **Misc**, **Grade** & **Contract** tabs will be completed by Temp Bank staff. Payroll staff can move on to Section 4 below.

3.17   Click on to the **Misc** tab.
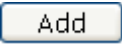
3.18   **Window in** to the **Location** field.

3.19   Click on **Add** [Add] and press **Enter** twice.

3.20   Select the location from the **Location** field if different to what it displays.

3.21   Press **Enter**.

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

💣 The reason MUST be the same as was entered at instruction 3.7.

3.23   Press **Enter**.

3.24   Click **Exit**. [Exit]

3.25   Click on the **Grade** tab.

3.26   Fees / Casual posts will be set up with a **DEFAULT** pay grade.

3.27   Press **Enter** to move through the **Contract** tab.

3.28   In the HESA Indicator field, enter an "**A**" (which stands for the atypical category for the HESA return).

3.29   Click on **User Fields**.

3.30   Enter the name of the School or Department contact in the **Sch/Dept Contact** field.

3.31   Using the scroll buttons , scroll down to the bottom of the screen.

3.32   Enter the name of the authorised signatory in the **Authorised Signatory** field.

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

3.34   Click on to move to the next data entry screen Employment Details

3.35   Employment Details: Check that all date details are applied correctly, especially if the staff member is a Rejoiner to the University.

4 Entering the Tax Code information

4.1 **Employee Current Post Holding** Select Add to enter the start date and complete the details.

4.2 If there is a P45 or P46 attached to the claim form then you should window in on the **Source** column button and pick **P45** or **P46** as relevant.

4.3 A pop up window will then appear, where you will need to fill in the necessary details:

4.4 If you have entered details for a P45 or P46 then click on the **Exit** button to return to the main screen.

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

5   Entering the National Insurance information

5.1   **Employee National Insurance Details** screen.
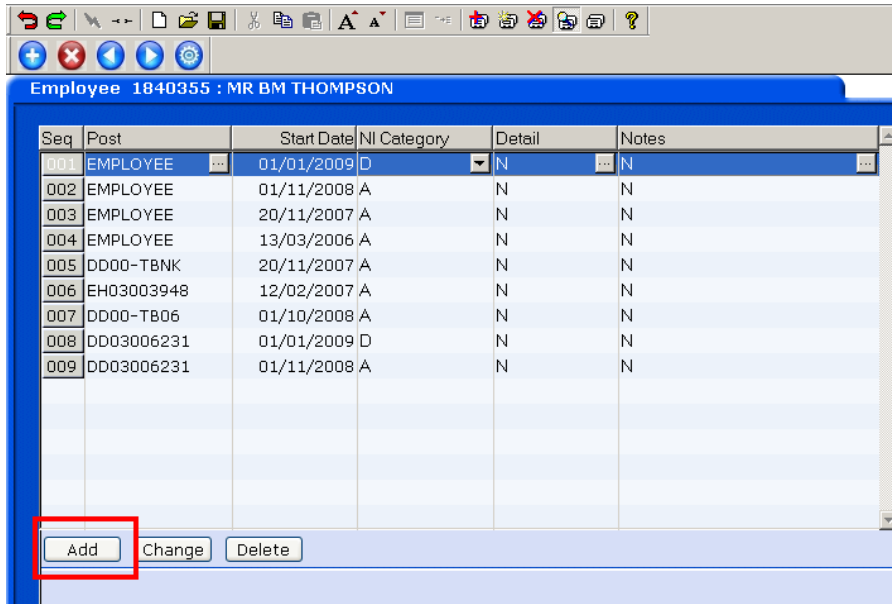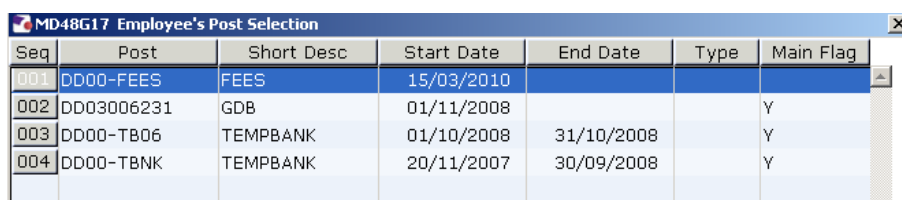

5.2   Change the NI Category row from a "D" to an "A" or a "C" as applicable:

- "A" = anyone who should pay basic national insurance

- "C" = anyone of pensionable age (i.e. a 60+ female or 65+ male)

5.3   Click on the **"Add"** button.

5.4   A window will open listing all of the person's posts:

5.5   Select the correct post and then click on "Select".

5.6   Tab through and enter the correct start date for this post, then enter through the rest of the row:

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

6 Entering details on the Fixed Pay Element Screen

ⓘ This screen should show a row for the employee tax, a row for the employee national insurance and a row for the post national insurance:
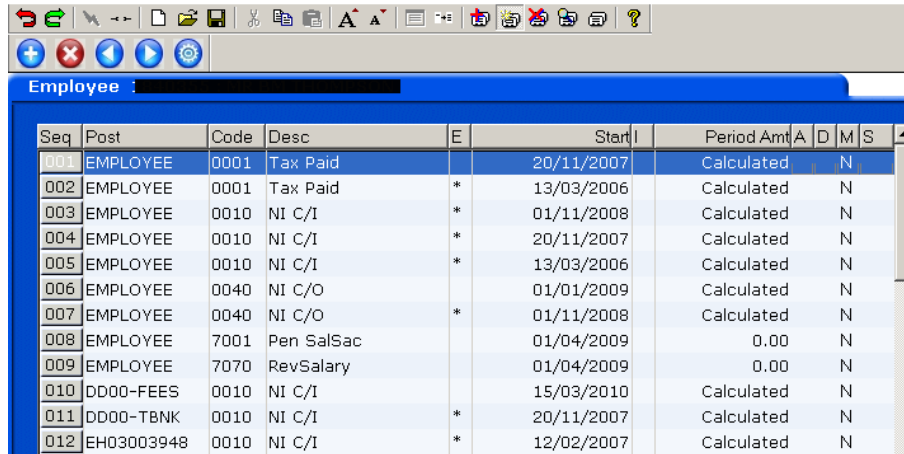

ⓘ You only need to use this screen if the person making the fees / casual claim is part of the **Student Loans Company**.

6.1 If the person is part of the Student Loans Company then click on the **"Add"** button, then enter code **"0125"** and enter the **Student Loans Company** details.

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

7 Entering details on the Temporary Pay Elements screen

7.1 Press **Enter** to move through to the **Tax Period** field (it will pick up the current tax period) and **Enter** again to pick up the Pay Type category:

7.2 Enter through the following fields until you see the following screen:

7.3 Click on the **"Add"** button. The following pop-up window will appear:

7.4 Enter the relevant temporary pay element code (e.g. code "**4000**" for "**Student Demonstrating Hours**")

7.5   Window in on the **Post** field to select the relevant post.

7.6   Enter the start date in the **Start Date** field.

7.7   Enter through the **End Date** field.

7.8   Enter the number of hours worked in the **Units** field.

7.9   A rate will display in the **Rate** field – this can be overwritten if necessary.

7.10   Enter the 9 digit cost code in the **Cost Code** field. If you see the following
         information message, click on **OK**:
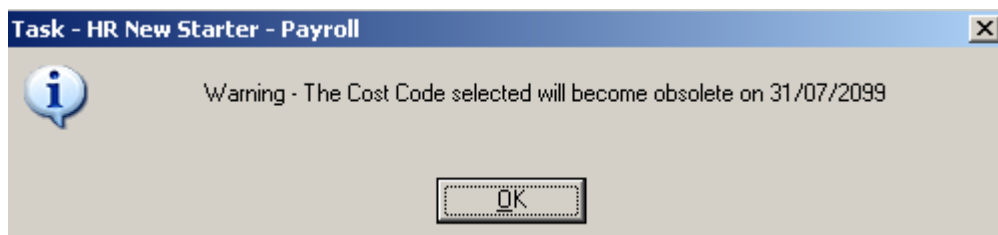
7.11   Click on the **Save**   button to save the record.

8 Performing a manual audit check of the claim form

8.1   In order to satisfy the external auditors it is necessary to have someone other than the person who entered the claim on ResourceLink to check the details if the claim form involved either of the following:

- A new starter
- Change of bank details

💣   For example, if the Temp Bank Office have entered the person on to ResourceLink and then passed the claim to someone in Payroll, who then finished the record on ResourceLink, then another Payroll colleague would need to check the claim.

8.2   If the person checking the claim form is satisfied that everything has been entered correctly then they should mark a yellow cross on the paper claim form and sign their name, indicating that they have checked it.