

This work instruction was last updated: 15th January 2010

HR Pensioner Process (PASNAS only)

This Work Instruction describes the process where an existing employee or past employee is transferring into a Pensioner Post – this has to be carried out in order for the person to receive PASNAS pension payments.

The Pensions team will notify the Senior Personnel Assistants in HR by email when a person is to start receiving PASNAS pension payments. HR will then need to enter the person onto the Zpensioner post.

This work instruction is broken into 3 sections:

- **Entering a current employee into a Pension post**
- **Entering a past employee (who is on ResourceLink and has left the University some time ago) into a Pension Post.**
- **Entering a past employee (who is not on ResourceLink and has left the University) into a Pension Post.**

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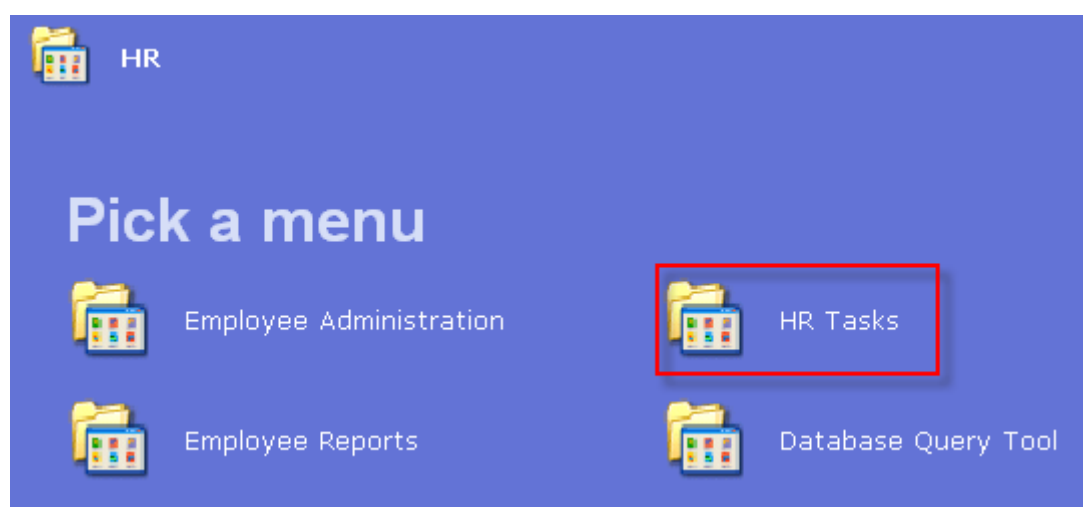
1 Entering a Current Employee into a Pension Post on ResourceLink

1.1 There are 2 parts to this process:

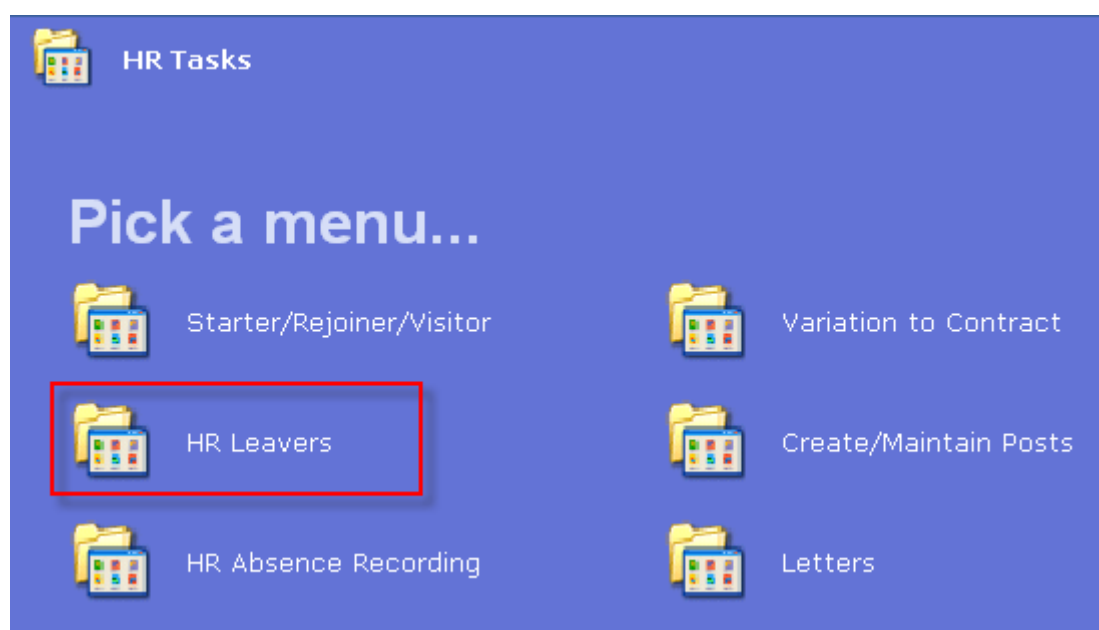
Part 1 - The employee needs to be **Terminated**, the record then P45'd and EDI'd by Payroll

Part 2 - The employee can then be **Rejoined** into the pensioner post

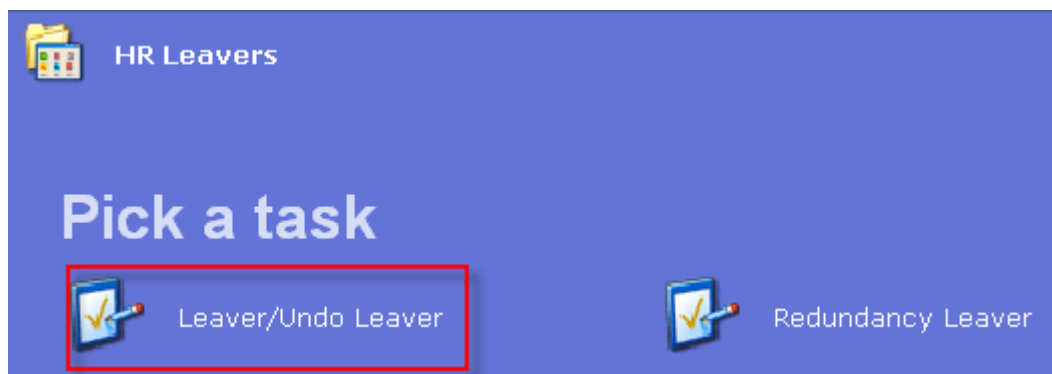
ResourceLink HR Home Page > **HR Tasks**



ResourceLink HR Home Page > HR Tasks > **HR Leavers**



ResourceLink HR Home Page > HR Tasks > HR Leavers >
Leaver/Undo Leaver



1.2 Enter the person's UPI in the **Employee** field.

Task - Leaver/Undo Leaver - Employee Selection Screen

Employee | Other Numbers | Structure | Saved List | Employment

Match ☒ Exact ☐ Partial

Employee Number

Surname Initials

Sex Nat. Ins. No.

Current Employee ☒ Y As at Date

Previous Surname

Known As

Surname	Init	Title	Emp Number	National ID Number	Start Date	Fore

Enter an Employee Number

1.3 Click on **Select** to enter the data entry screens.

2 Part 1 - Terminating the Employee

Task - Leaver/Undo Leaver - Employee Personal Detail

Session Edit View Other Process Tools Display Help

Employee

Title Details

Legislation Type

Surname

Title

First Forename

Other Forenames

Prev. Surname

Known As

Honours

Generation

Personal Details

Gender F

Date of Birth 16/02/1945 Age: 65 Years 2 Months

Nat. Ins. No. YH539031A Case Number

Home Address Cont. Addresses Passport/Visa Contact Tel

Email Address Marital Status User Fields Notes

Enter the person's Surname CHANGE NUM MDSE

2.1 Use the **Personal Details** screen to check that you are working on the correct employee.

2.2 Click on **Screens** .

CTTASKVW View Current Screens in Task

Seq	Screen	Screen Name	Status
001	MD55S3	Personal Details	<
002	MD47S1	Employment Detail	
003	MD47S71	Employee Contract Details	
004	MD47S7	Employee Post Holding History	
005	MD49S2	Employee Basic Pay Details	
006	MD47S1B	Employee Current Post Holding	
007	MD48S2	Employee Temporary Pay Element	
008	MD82S5	Employee Holiday Entitlement	
009	MD82S1	Employee Absence Details	
010	MD55S79	Employee Work Permits	
011	MD47S23	Employee Post Holding Costing	

2.3 Click on **Employment Detail**.

Task - Leaver/Undo Leaver - Employment Detail

Session Edit View Other Process Tools Display Help

Employee

Dates

Original Start	01/06/2007	SG001	New Appointment
Current Start	01/06/2007	SG001	New Appointment
Termination			
To Staff			
Probation			

Additional

Service 2 Years 11 Months 6 Days

Employee Type

Self Service Unit

Willing to Job Share

Notice Period

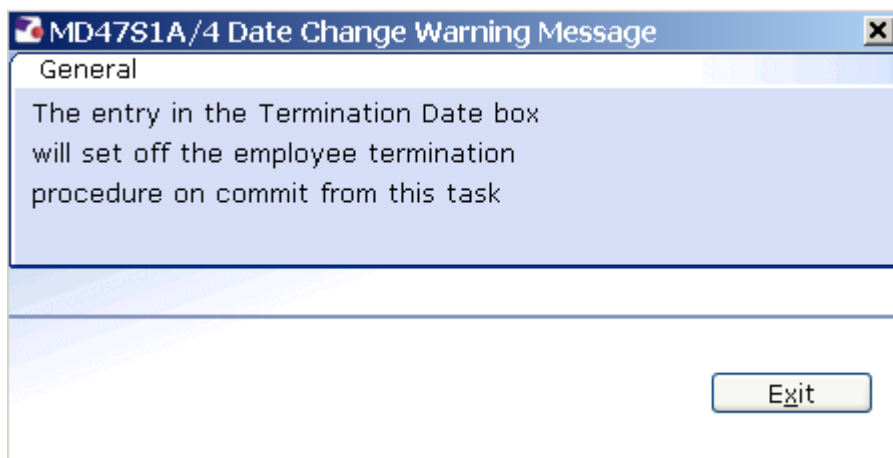
No Of Current Posts 1

TUPE N

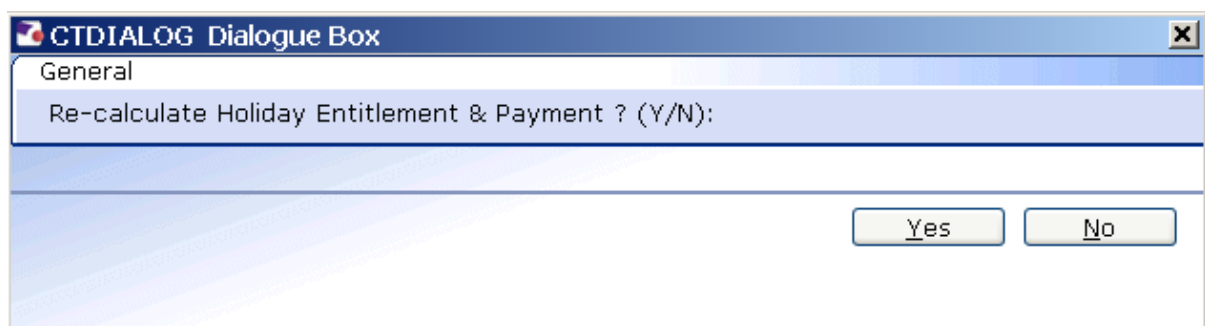
Enter the employee's Original Start Date

ADD NUM MD47

- 2.4 In the **Termination** field enter the last working date before the employee retires



- 2.5 A warning message will appear as above, click on **Exit**



- 2.6 A dialogue box will appear as above, click on **No**

- 2.7 Window into the **Termination Reason** field:



- 2.8 Scroll down the list of termination reason and select the appropriate retirement reason:

MD57G3 Dependency Selection

Seq	Code	Description	Score
013	LG011	Dismissal - Capability/Ill Health	
014	LG012	Dismissal - Ill Health Early Retirement	
015	LG013	Dismissal - Redundancy	
016	LG014	Dismissal - Statutory Bar	
017	LG015	Dismissal - Work Permit/Visa not Extend	
018	LG016	Dismissal - Other Reason	
019	LG017	Voluntary Severance	
020	LG019	Dismissal - Normal Retirement Age	
021	LG020	Early Retirement - Enhanced Provision	
022	LG021	Early Retirement - No Enhanced Pension	
023	LG022	Resignation - Better Reward Package	
024	LG023	Resignation - Promotion	

Add Select Delete

Exit

Employee

Dates

Original Start	01/06/2007	SG001	New Appointment
Current Start	01/06/2007	SG001	New Appointment
Termination	30/09/2010	LG019	
To Staff			
Probation			

2.9 Enter through the reason field:

MD202G50 HESA Leaving Destination

General

Leaving Destination

Exit

2.10 Click on the drop down in the **Leaving Destination** field and select reason **22 – Retirement**:

Code	Desc	Long Description
01	Ano HEI UK	Another HEI in UK
02	HEIOversea	HEI Overseas
03	Other EI	Other Education Institution in UK
04	Other EI	Other Education institution in overseas
05	ResInstit	Research Institution in the UK
06	Res Instit	Research institution Overseas
07	Student Uk	Student in UK
08	Stdnt Over	Student in an overseas country

- 2.11 Enter through all the remaining field on the **Employment Details** screen until the following screen appears:

Fixed P/E Automatically Closed	Y
View Fixed PE Before Update	N
View Fixed PE After Update	N
Temp P/E Automatically Closed	N
View Temp PE Before Update	N
View Temp PE After Update	N
Training Automatically Closed	Y
View Training Before Update	N
View Training After Update	N
Terminate Clocking Details	Y
Set Operator Obsolete	Y

- 2.12 Click on **Continue**

Task - Leaver/Undo Leaver - Employment Detail

Session Edit View Other Process Tools Display Help

Employee

Dates

Original Start	01/06/2007	SG001	New Appointment
Current Start	01/06/2007	SG001	New Appointment
Termination	30/09/2010	LG019	Dismissal - Normal Retir
To Staff			
Probation			

Additional

Service 3 Years 4 Months

Employee Type

Self Service Unit

Willing to Job Share

Notice Period

No Of Current Posts 1

TUPE N

Service Breaks User Fields Notes Empl. History

Enter the employee's Original Start Date ADD NUM MD47

2.13 Save the record.



CTCONFIRM Confirm Action

General

Are you sure you want to Save?

Yes No


2.14 Click 'Yes' that you are sure you wish to save

MD103G2 Standard Letters Attached to the Task

Seq	Letter	Ver	Description	Let Opts	Copies
001	ACAPEND	001	ACAP - end of FTC	NOACT	1
002	ACAPNRED	001	ACAP - end of FTC no red	NOACT	1
003	ERLYRET	001	Early Retirement	NOACT	1
004	LEAVER	001	Expiry of contract - FTC no redundancy	NOACT	1
005	RESIGN	001	Resignation	NOACT	1
006	RETIREE	001	Retiree	NOACT	1
007	RETIREFL	001	Retirement Planning Letter	NOACT	1
008	VSACCEPT	001	Voluntary Severance - acceptance	NOACT	1
009	VSCL	001	Voluntary Severance - letter with CA	NOACT	1
010	VSHOLD	001	Voluntary Severance - pending	NOACT	1
011	VSREJ	001	Voluntary Severance - Rejected	NOACT	1

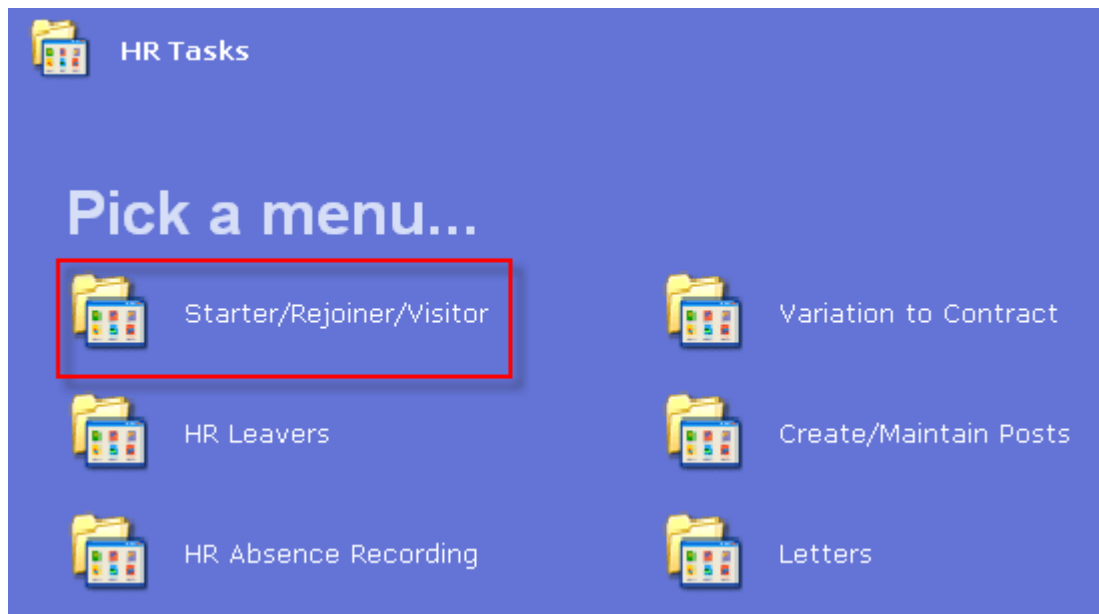
2.15 Select the applicable retirement letter and select **Merge** in the **Let Opts** field

2.16 Continue through the screens as directed until the letter is produced

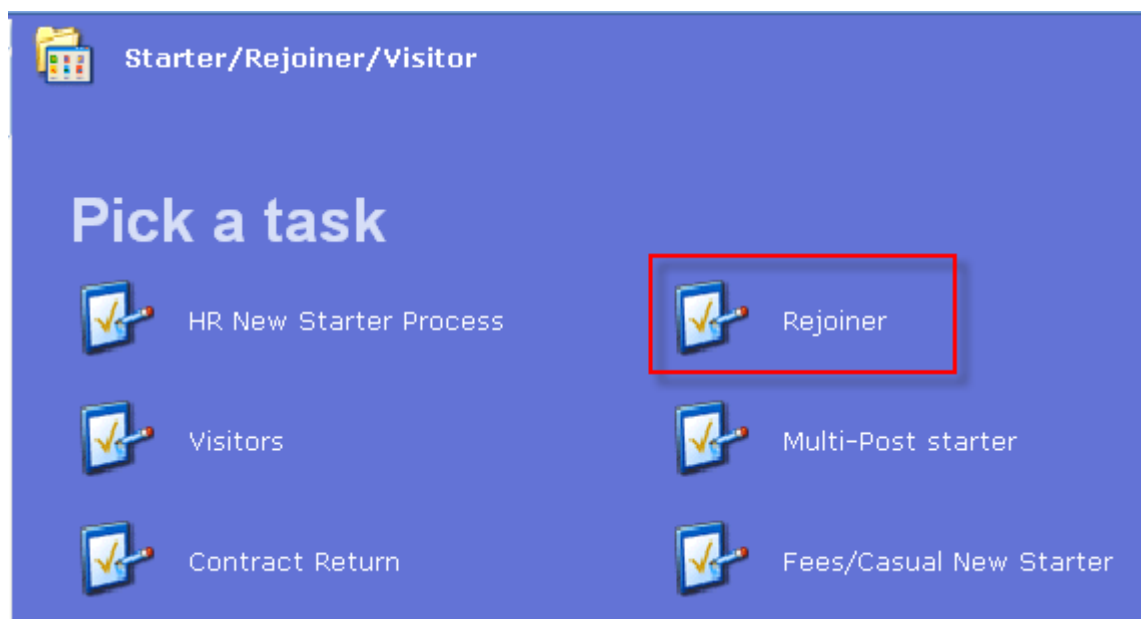
-  You now need to get Payroll to generate the employee's **P45** and **EDI** the leavers record, once this has been done you can then rejoin the employee into a Pensioner post by following Part 2 of this instructions below

3 Part 2 - Rejoining the Employee into a Pensioners Post

3.1 From the HR Tasks menu select **Starter/Rejoiner/Visitor**



3.2 Select the **Rejoiner** task:



3.3 Enter the Employee number in the Employee selection screen

Task - Rejoiner - Employee Selection Screen

Employee Other Numbers Structure Saved List Employment

Match ☒ Exact ☐ Partial

Employee Number

Surname Initials

Sex Nat. Ins. No.

Current Employee ☒ As at Date 06/05/2010

Previous Surname

Known As

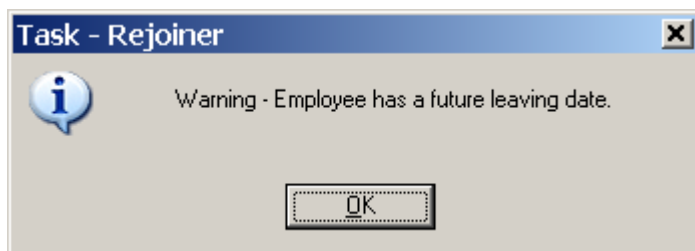
Add Search

Surname	Inits	Title	Emp Number	National ID Number	Start Date	Fore

Select Exit Save List

Enter an Employee Number CHANGE NUM MD5E

3.4 As the employee has been terminated, the following screen will appear:



3.5 Click on **OK** to move into the employee record

3.6 Click on the screens button  and move to the **Employment Detail** screen:

CTTASKVW View Current Screens in Task

Seq	Screen	Screen Name	Status
001	MD55S3	Personal Details	Y
002	MD55S12	Person Equal Opportunities	
003	MD47S1	Employment Detail	<
004	MD49S2	Employee Basic Pay Details	
005	MD47S71	Employee Contract Details	
006	MD47S7	Employee Post Holding History	
007	MD55S4	Person Relationship Summary	
008	MD55S79	Employee Work Permits	
009	MD55S70	CRB Details	
010	MD55S77	Individual Employment Check De	
011	MD47S1B	Employee Current Post Holding	

Add Select Delete

Exit

Task - Rejoiner - Employment Detail

Session Edit View Other Process Tools Display Help

Employee

Dates

Original Start	01/06/2007	SG001	New Appointment
Current Start	01/06/2007	SG001	New Appointment
Termination	30/09/2010	LG019	Dismissal - Normal Retir
To Staff			
Probation			

Additional

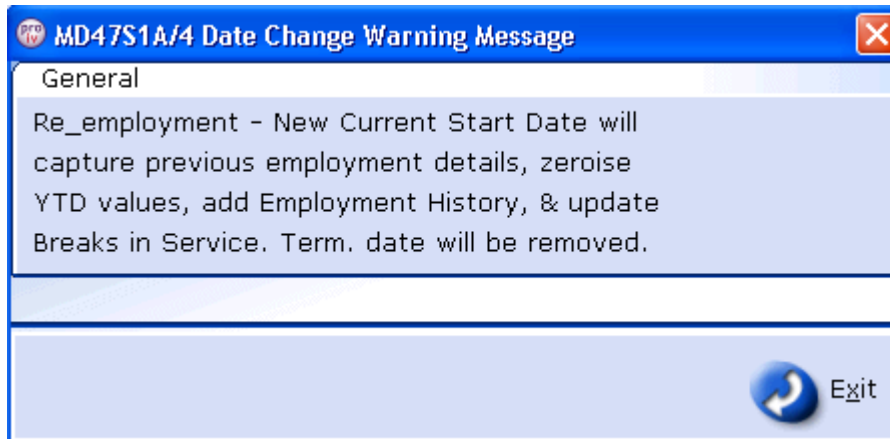
Service	3 Years 4 Months
Employee Type	
Self Service Unit	
Willing to Job Share	
Notice Period	
No Of Current Posts	1
TUPE	N

Service Breaks User Fields Notes Empl. History

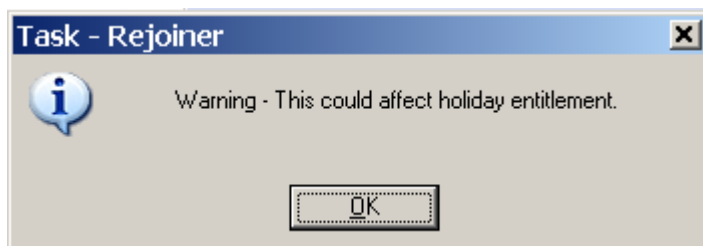
Enter the employee's Original Start Date ADD NUM MD47

3.7 In the **Current Start** field enter the Start Date of the pensioner status (this will be the day after the Termination date) and press enter

3.8 The following message will appear, click on **Exit**:



3.9 Another message will appear, click on **OK**



3.10 Window into the **Current Start** reason field and select **PJL042 – Transfer to Pensioner**

Dates			
Original Start	05/03/2001	SG006	Conversion
Current Start	05/12/2009	PJL024	Transfer to Pensioner
Termination	04/12/2009	LG019	Dismissal - Normal Retir
To Staff			
Probation			

3.11 Enter through all the remaining fields on the screen

3.12 The Termination date will automatically be removed:

Task - Rejoiner - Employment Detail

Session Edit View Other Process Tools Display Help

Employee

Dates			
Original Start	05/03/2001	SG006	Conversion
Current Start	05/12/2009	PJL024	Transfer to Pensioner
Termination			
To Staff			
Probation			

Additional			
Service	9 Years 2 Months 2 Days		
Employee Type			
Self Service Unit			
Willing to Job Share		TUPE	N
Notice Period			
No Of Current Posts			

Service Breaks User Fields Notes Empl. History

Enter the employee's Current Start Date

CHANGE NUM MD47

3.13 Click on **Screens**



3.14 Click on screen **Employee Current Post Holding**

-

- 

MD47L3 Employee Post Holding Details

Detail

Post	ZPENSIONER	Pensioner
Job	ZPENSIONER	Pensioner
Employee Grade		
Post Grade	DEFAULT	SYSTEM DEFAULT GRADE

General Conditions Misc Grade Contract

Start 05/12/2009 **P.JL024** Transfer to Pensioner

End

Service In Post 5 Months 2 Days

Projected End

Post Main Flag ☐ Suspended ☐

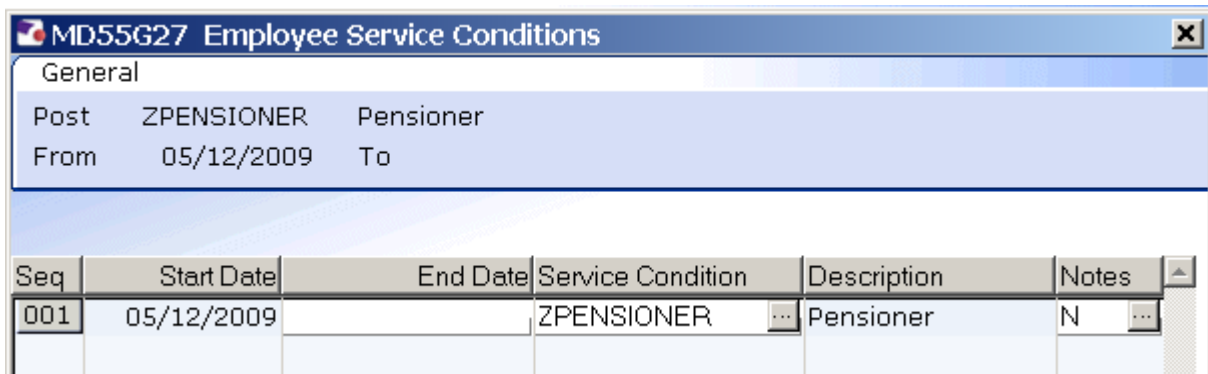
Exc. from attracting Ee's Costs ☐

T/S Template Perf Management User Fields Notes

Salary Planning **Exit**

- 3.21 Window into the field adjacent to **Start** and enter the reason **PJL024 – Transfer to Pensioner**.
- 3.22 Press **Enter**
- 3.23 Click in the **Post Main Flag** field and enter **Y** if the person will not be attached to any other posts at the University from the start of this pension post.
 - ☛ If the person is still employed within another post at the University (whilst being attached to the Zpensioner) post then the other post will need to be their main post and leave this field blank.
- 3.24 Click on the **Conditions** tab.

- 3.26 Make sure the **Start Date** is correct then enter past the end date field, enter **ZPENSIONER** in the **Service Condition** field and press enter



MD55G27 Employee Service Conditions

General

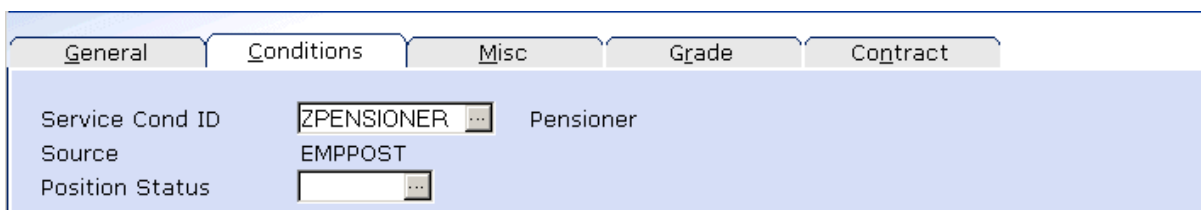
Post ZPENSIONER Pensioner

From 05/12/2009 To

Seq	Start Date	End Date	Service Condition	Description	Notes
001	05/12/2009		ZPENSIONER	Pensioner	N

- 3.27 Click on **Exit**

- 3.28 Enter down to the **Position Status** field



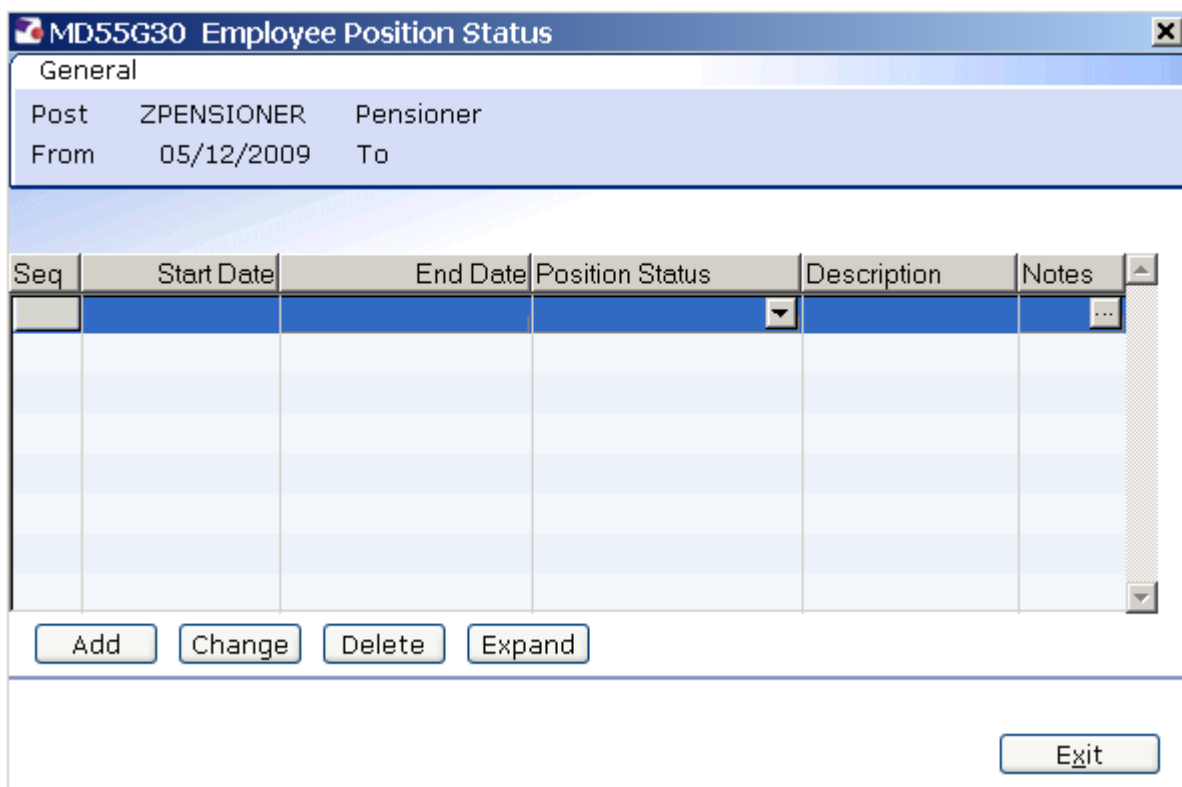
General Conditions Misc Grade Contract

Service Cond ID ZPENSIONER Pensioner

Source EMPPOST

Position Status

- 3.29 Window into the **Position Status** field.



MD55G30 Employee Position Status

General

Post ZPENSIONER Pensioner

From 05/12/2009 To

Seq	Start Date	End Date	Position Status	Description	Notes

Add Change Delete Expand

Exit

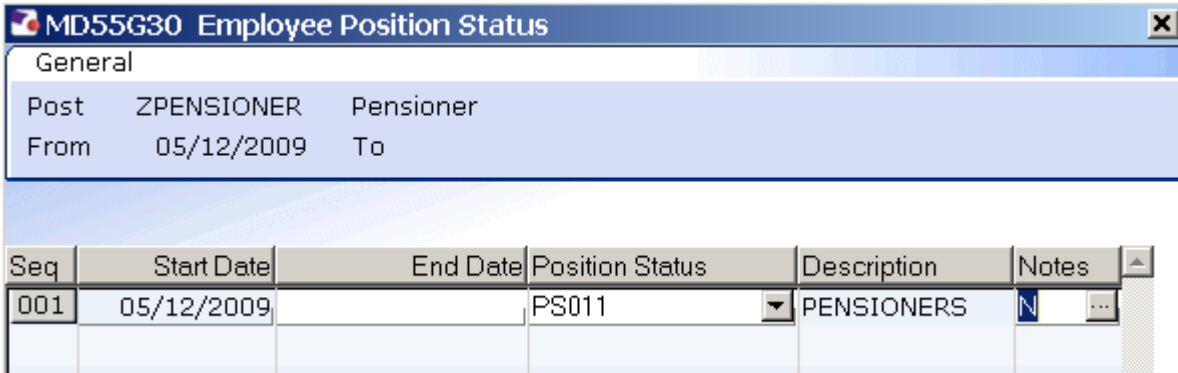
3.30 Click on **Add** 

3.31 The **Start Date** field will auto populate.

3.32 Press **Enter** to move past the **End Date** field

3.33 Click in the drop down in the **Position Status** field and click on **PS011 – Pensioners**.

3.34 Press **Enter**.

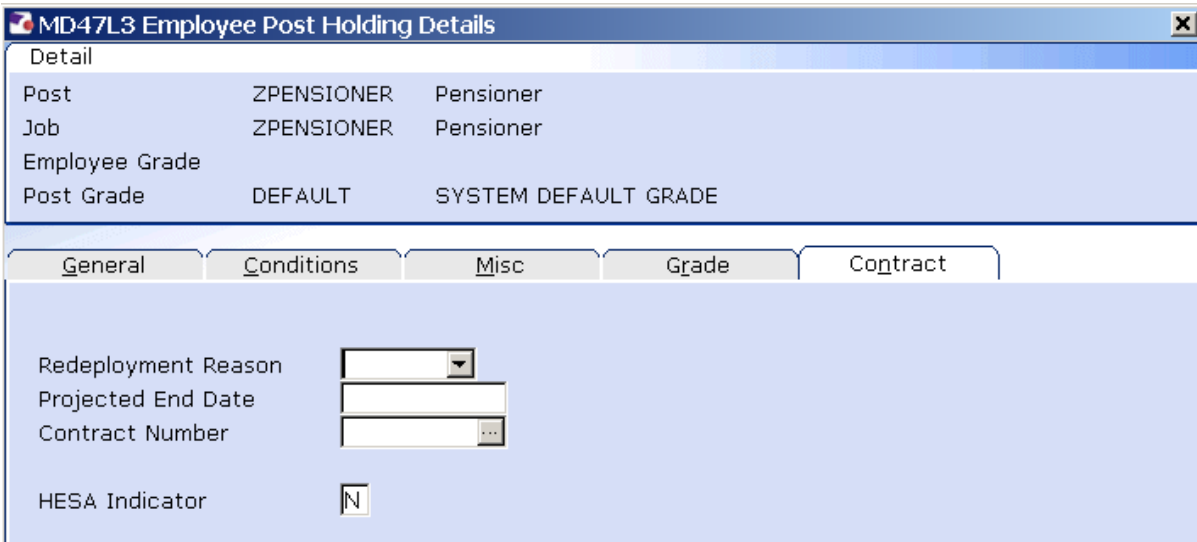


The screenshot shows the 'MD55G30 Employee Position Status' window. The 'General' tab is active. It displays 'Post' as 'ZPENSIONER' and 'Pensioner'. The 'From' date is '05/12/2009'. Below this is a table with columns: Seq, Start Date, End Date, Position Status, Description, and Notes. The first row has '001' in Seq, '05/12/2009' in Start Date, an empty End Date, 'PS011' in Position Status (with a dropdown arrow), 'PENSIONERS' in Description, and 'N' in Notes.

Seq	Start Date	End Date	Position Status	Description	Notes
001	05/12/2009		PS011	PENSIONERS	N

3.35 Click on **Exit** .

3.36 Click on the **Contract Tab** and make sure the **HESA Indicator** has a **N** in it



The screenshot shows the 'MD47L3 Employee Post Holding Details' window. The 'Detail' tab is active. It displays 'Post' as 'ZPENSIONER' and 'Pensioner'. The 'Job' is 'ZPENSIONER' and 'Pensioner'. The 'Employee Grade' is 'DEFAULT' and 'SYSTEM DEFAULT GRADE'. Below this are tabs: General, Conditions, Misc, Grade, and Contract. The 'Contract' tab is selected. It shows 'Redeployment Reason' with a dropdown, 'Projected End Date' with a date field, 'Contract Number' with a text field and a dropdown arrow, and 'HESA Indicator' with a dropdown showing 'N'.

3.37 Click on **Exit** .

3.38 Click on **Screens** .

3.39 Click on **Employee Basic Pay Details**

Task - Rejoiner - Basic Pay Detail

Session Edit View Other Process Tools Display Help

Employee

Pay Control

Pay Group SubPayroll **PSUB1** Staff
 Ctrl group Payroll PAYROLL1 (Main Payroll)
 Pay Type M Monthly
 Pay Method BACS BACS
 Cheque Pay

Other

Last Paid Year 2009
 Period 08
 Date 30/11/2009
 Suspended Flag N Backdate NI ☐
 Industrial Action N
 Starter Flag ☐

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

Press WINDOW to select the structure unit the employee belongs to CHANGE NUM MD49

3.40 Window into the **Pay Group** field.

MD45G3 Structure Unit Group selection

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

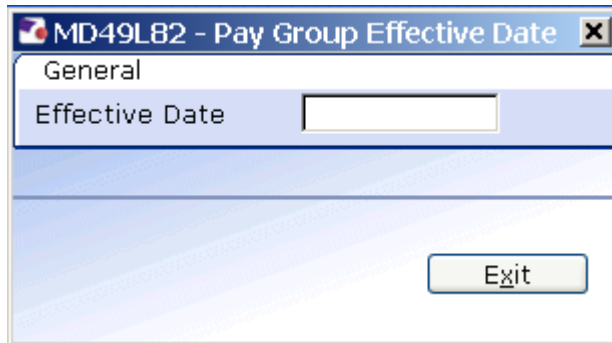
Add Select Delete Expand

Exit

3.41 Click on **PSUB2 Pensioners**


💡 If the pensioner will also be attached to a Fees or Temp Bank post, select **PSUB3** instead, if they will be attached to a contracted post select **PSUB1** instead.

3.42 Press **Enter**.



3.43 In the **Effective Date** field enter the date the person started in the ZPensioner post.

3.44 Press **Enter**.

3.45 Click on **Save** 

3.46 There are no letters to be printed out from this particular task.

❗ You will need to email Payroll/Pensions to alert them that this person has now been moved into the Zpensioner post, they will then enter the pension payments.