

**This work instruction was last updated: 07 May 2010**

## **HR Promotions Process**

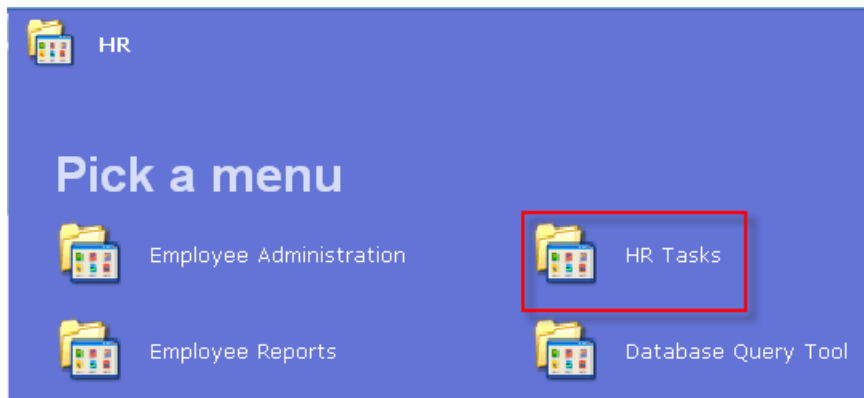
This Work Instruction describes the HR Promotions Process for existing employees at the University who are to be promoted.

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

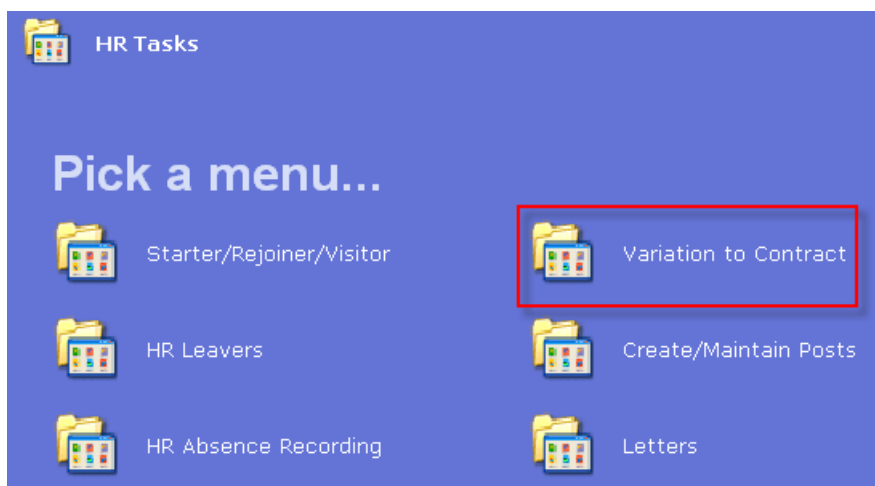
- |   |  |
|---|--|
| 1 | Starting the Promotions Process        |
| 2 | Personal Details data entry screen     |
| 3 | Current Post Holding data entry screen |
| 4 | Holiday Entitlement data entry screen  |
| 5 | Employment Detail data entry screen    |
| 6 | Fixed Pay Elements data entry screen   |
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## 1 Starting the Promotions Process

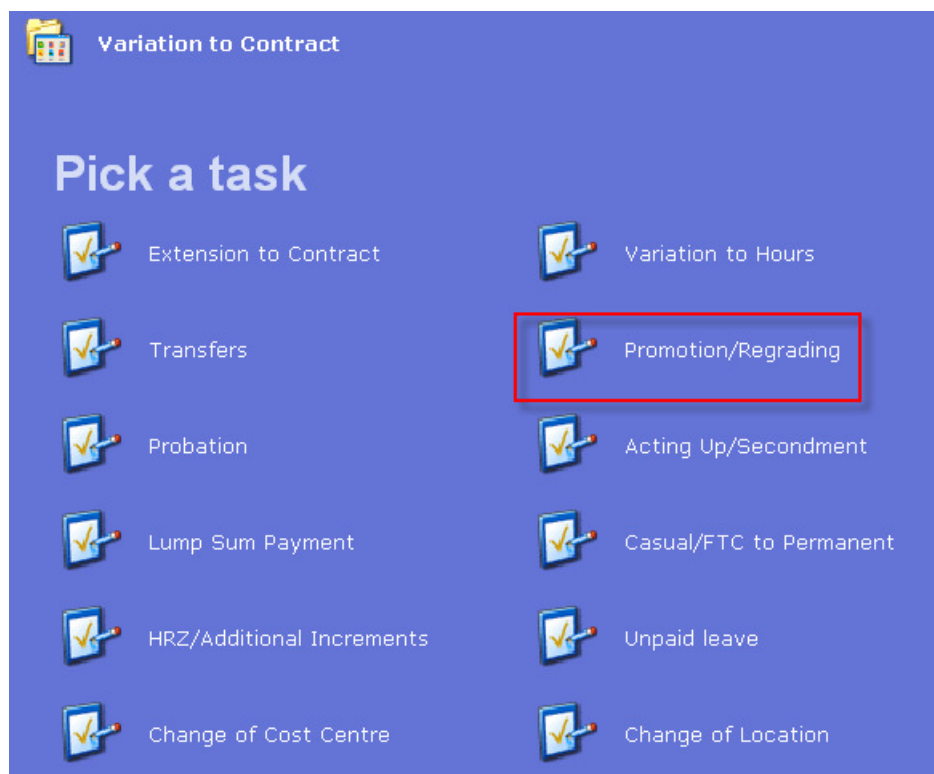
ResourceLink HR Home Page > HR Tasks



HR Tasks > Variation to Contract



Variation of Contract > Promotion/Regrading



1.1 Enter the employee's UPI in the **Employee** field.

Task - Promotion/Regrading - Employee Selection Screen

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	For

Enter an Employee Number

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

## 2 Personal Details data entry screen

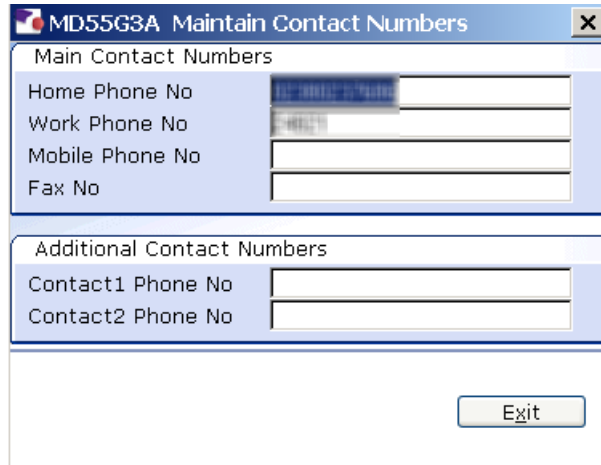
- ① As the person being promoted is already an existing employee the **Personal Details** screen should already be completed. Check and update the information where necessary.

- 2.1 Click on **Home Address** to check and, where necessary, update the address details.

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

2.2 Click **Exit**.

2.3 Click on **Contact Tel** to check and, where necessary, update the contact telephone details.



The screenshot shows a dialog box titled "MD55G3A Maintain Contact Numbers". It has a close button (X) in the top right corner. The dialog is divided into two sections: "Main Contact Numbers" and "Additional Contact Numbers".

**Main Contact Numbers:**

- Home Phone No: [Text Field]
- Work Phone No: [Text Field]
- Mobile Phone No: [Text Field]
- Fax No: [Text Field]

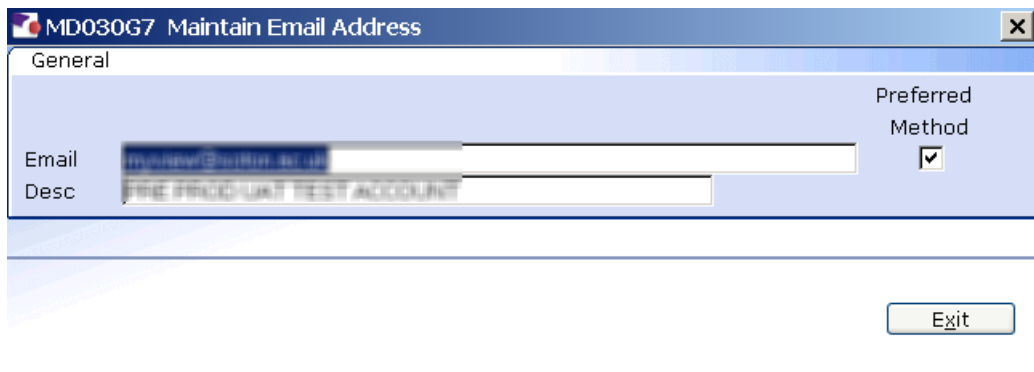
**Additional Contact Numbers:**

- Contact1 Phone No: [Text Field]
- Contact2 Phone No: [Text Field]

At the bottom right, there is an "Exit" button.

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

2.5 Click on **Email Address** check and, where necessary, update the email address details (note: we are not using the "Preferred Method" field).



The screenshot shows a dialog box titled "MD030G7 Maintain Email Address". It has a close button (X) in the top right corner. The dialog is divided into two sections: "General" and "Preferred Method".

**General:**

- Email: [Text Field]
- Desc: [Text Field]

**Preferred Method:**

- Preferred Method: ☒

At the bottom right, there is an "Exit" button.

2.6 Click on **Exit**.

2.7 Click on **Marital Status** to check and where necessary update the relevant information.


2.8 If the status has change you will have to click on **Add** to enter a new row of data.

Seq	Start Date	Marital Status	Verified?
001		S	

Add Change Delete

Exit

Enter the known Marital Status information and click **Exit**.

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

### 3 Current Post Holding data entry screen

- ① As this employee already has an existing contract this screen will contain a row for each post they currently hold. To view information on the existing post(s) **Window in** to the **Summary** field on that row.

Seq	Start	Post	M	Grade	Status	N	Detail	Summary
001	01/12/2007	JF07004991	Y	GRADE 3	PS001	N	Y	

Buttons: Add, Change, Delete, Expand

Post Linking

Status Bar: Pseudo-Sequence Number for Index Paging | CHANGE | NUM | MD47

- 3.1 **Window in** to the **Detail** field of the post to which the promotion applies.
- 3.2 If the promotion means that the Service Conditions will be changing with the grade select the **Conditions** tab; otherwise go to step 3.13.

**Task - Promotion/Regrading - Employee Current Post Details**

Session Edit View Other Help

**MD47L3 Employee Post Holding Details**

Detail

Post	JF07004991	SUPPORT TECHNICIAN
Job	MSA3	Management Specialist & Administrative 3
Employee Grade		
Post Grade	GRADE 3	Level 3

General Conditions Misc Grade Contract

Service Cond ID: MSA1B&2 Management Specialist & Administrative 1

Source: EMPPOST

Position Status: PS001 Full Time - Permanent

Occupancy: [Dropdown]

Wk Pattern: 35MTWTF S0M7T7W7T7F7S0

Source: EMPPOST

Contract Hours: 35.00 Weekly Hours: 35.00 00.0000

Source: CONTRACT FTE 1.0000

T/S Template Perf Management User Fields Notes

Salary Planning

Exit

Press Window For Service Conditions ADD NUM MD47

### 3.3 Window in to the **Service Cond ID** field.

**MD55G27 Employee Service Conditions**

General

Post: JF07004991 SUPPORT TECHNICIAN

From: 01/12/2007 To:

Seq	Start Date	End Date	Service Condition	Description	Notes
001	01/12/2007		MSA1B&2	MSA1B&2	N

Add Change Delete Expand

Exit

### 3.4 Select the current Service Conditions and click on **Change**.



3.5 Type in the **End Date** for the current Service Conditions – this will be the day before the promotion takes effect.

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

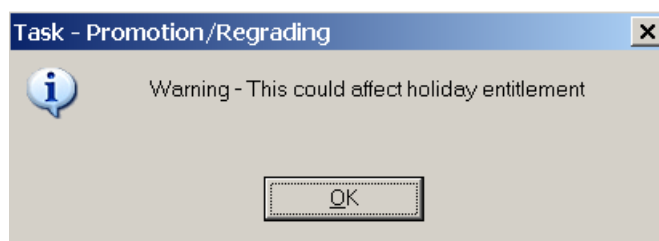
3.6 **ENTER** through the remaining fields.

3.7 Click on **Add** to add the new Service Conditions.

3.8 Type in the **Start Date** for the new Service Conditions.

3.9 **Window in** to the **Service Condition** field and select the appropriate service condition.

3.10 The following dialog box may be displayed:



Click **OK**.

3.11 **ENTER** through the remaining fields.

3.12 Click on **Exit**.

☛ The **current** Service Cond ID will be displayed until the date that the promotion comes into effect.

3.13 Select the **Grade** tab.

3.14 **Window in** to the **Pay Grade** field and click on **Add**. The following screen will be displayed:

MD47G41 Employee Spinal Grade History

General

Post JF07004991 SUPPORT TECHNICIAN

From 01/12/2007 T.

Seq	Start Date	End Date	Grade	Reason	Source	Source	Point	N
005	01/08/2009		GRADE 3	GD004	INCRUN	POSTGD	23	N

Point Rate 13.3003 Enh.Rate Point Amount 24273.00

Override Date Override Reason

Override Step Carry Forward

Bar Point Current Bar Point 26

006

Point Rate Enh.Rate Point Amount

Override Date Override Reason

Override Step Carry Forward

Bar Point Current Bar Point

Add Change Delete Expand

Exit

3.15 Type the date that the promotion takes effect into the **Start Date** field.

- It is not necessary to type in an end date for the existing pay grade as this will be done automatically.

3.16 Press **ENTER** twice. The following dialog box will be displayed:

Optional Closure of Line of Grade History

General

New Grade History record overlaps with current Open Grade History record.

This procedure will automatically update the end date of the existing open Grade History record.

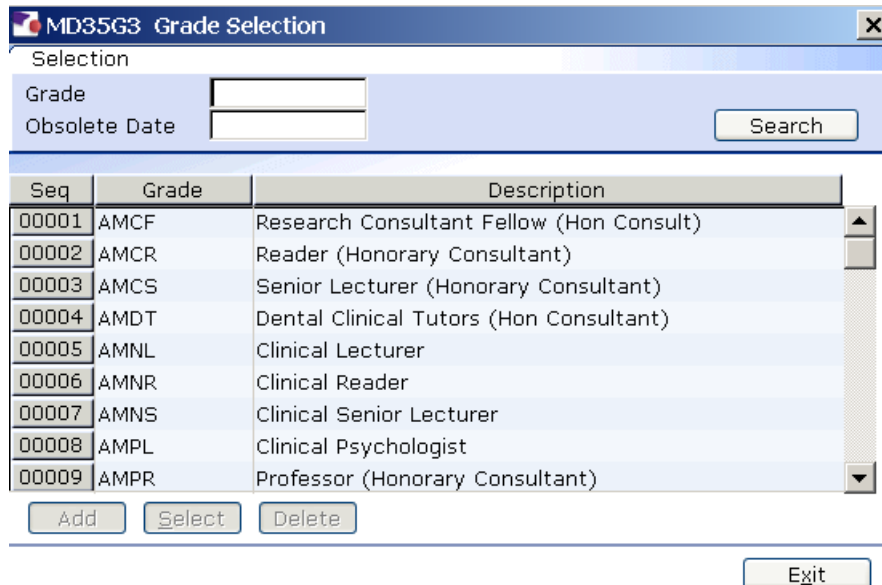
Confirm (Y or N) N

Type **Y** to confirm and press **ENTER**.

3.17 **Window in** to the **Grade** field and press **ENTER** twice to display a list of available grades.

- It is not necessary to enter the grade in the new line if the employee's grade is due to stay the same and it is just the spinal point that is due to be raised. The grade field will pull through the employee's grade from the existing line.

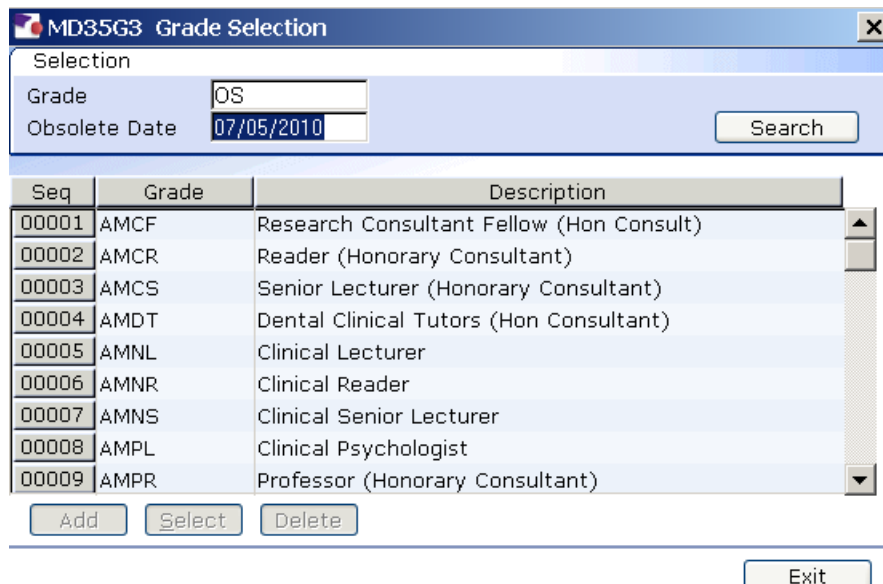
- ❗ If the employee is on a **Off Scale Salary** or works above the standard hours for their grade (i.e. is paid on **Hourly Rate Grades** e.g. Nursery staff, Halls Cleaning, Security), window into the **Grade** field.



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

- 3.18 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



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

### Hourly Rate Grades

**MD35G3 Grade Selection**

Selection

Grade:  Obsolete Date:

Seq	Grade	Description
00001	GRD1A 35.5	Grade 1A 35.5
00002	GRD1A 36H	Grade 1a 36hours
00003	GRD1B 36H	Grade 1b 36hours
00004	GRD1B35.5H	Grade 1B 35.5 Hours
00005	GRD2A 36H	Grade 2a 36hours
00006	GRD2A35.5H	Grade 2a 35.5 Hours
00007	GRD2B 36H	Grade 2b 36 hours
00008	GRD2B35.5H	Grade 2b 35.5hours
00009	GRD3 35H	Grade 3 35hours

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

3.20 Press **ENTER** to move to the **Reason** field and select **PJL004 Promotion** from the drop down list.

- ☛ 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.

**MD47G41 Employee Spinal Grade History**

General

Post: JF07004991 SUPPORT TECHNICIAN  
From: 01/12/2007 T.

Seq	Start Date	End Date	Grade	Reason	Source	Source	Point	N
005	01/08/2009		GRADE 3	GD004	INCRUN	POSTGD	23	N
	Point Rate	13.3003	Enh.Rate			Point Amount	24273.00	
	Override Date					Override Reason		
	Override Step					Carry Forward		
	Bar Point					Current Bar Point	26	
006	01/05/2010		GRADE 3		POSTPL	POSTGD		
	Point Rate		Enh.Rate			Point Amount		
	Override Date					Override Reason		
	Override Step					Carry Forward		
	Bar Point					Current Bar Point		

**Annual increments:**

**Note:** For most service conditions, the system will automatically award an increment on the next 1<sup>st</sup> 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 1<sup>st</sup> August comes round.

- ☛ Please note however that there are some service conditions where 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 on the next page.**

**So, if you are entering a new starter to the University who is starting between 1<sup>st</sup> August and 31<sup>st</sup> January then you can safely leave the “Override date” field blank as they will have been in post for over 6 months by 1<sup>st</sup> August and should receive an additional 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 1<sup>st</sup> August (i.e. anyone starting after 1<sup>st</sup> 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 1<sup>st</sup> 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 1<sup>st</sup> August).

**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 1<sup>st</sup> 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.

3.21 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.

Seq	Bar Point	Removed	Reason	N	Reason
001	26			N	
002	27			N	
003	28			N	
004	29			N	
005	30			N	
006	31			N	
007	32			N	

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

3.23 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

3.24 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.

3.25 Click on **Exit**.

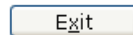


3.26 Press **Enter** to update **Current Bar point**. You can now go back to the **Point** field and enter a point within the HRZ.

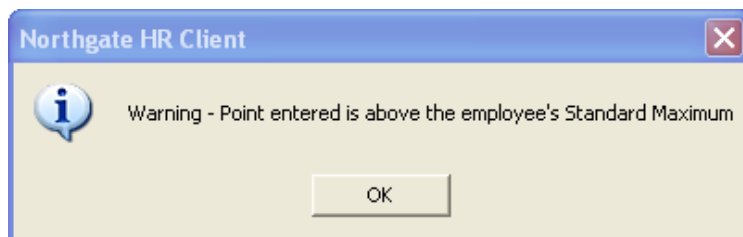
**Please note:** if you are ever entering a backdated grade row which will precede a cost of living increase you will need to:

- 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

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

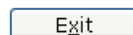


3.28 The following Warning message may appear.




3.29 Click **OK**

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



☛ The **current** Pay Grade will be displayed until the date that the promotion comes into effect.

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

☛ If you are prompted to recalculate the Holiday Entitlement select **No**.

## 4 Holiday Entitlement data entry screen

- ❗ As the person being promoted is already an existing employee the **Holiday Entitlement** screen should already be completed. Check and update the information where necessary.
- ❗ **Only complete this screen if the employee's Service Conditions have changed and this has affected their holiday entitlement. For example, the promotion is from Grade 3 to Grade 4.**

Seq	Start Date	End date	Entlmnt	B/F	Extra	Taken	Remain
001	01/10/2009	30/09/2010	24.0	0.00	0.0	26.00	2.00-


Buttons: Add, Change, Delete, Expand

Work Pattern

Status bar: Ready, CHANGE, NUM, MD82

- ❗ Make a note of the employee's start date, their holiday entitlement for the current leave year and their remaining entitlement **BEFORE** proceeding with this instruction.
- 4.1 Select the record for the **current** leave year and click on **Delete** – DO NOT delete records for previous years.
  - 4.2 Click on **Add** to add a new record.
  - 4.3 Re-enter the line but enter the **End Date** – this will be the day before the promotion takes effect.
- ❗ Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.



- 4.4 Press **ENTER** to move to the **Extra** field and type in the number of days that have been taken. This should be entered as **–number of days**, eg -10. (The **Entlmnt** field should be updated automatically.)
- 4.5 Press **ENTER**. The **Remain** field will be automatically updated. This may be a negative number.
- 4.6 Click on **Add** to add a new record to reflect the promotion.
- 4.7 Type the date that the promotion takes effect into the **Start Date** field.
- ☛ Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.
- 4.8 Press **ENTER** to move to the **End Date** field.
- 4.9 Type in the **End Date** for the current leave year – this will be 30 September of the current year.
- ☛ Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.
- 4.10 Press **ENTER** to move to the **Extra** field.
- 4.11 In the **Extra** field type in the number of days that are remaining in the current leave year. This should be entered as **number of days** for days remaining, eg 10; or as **–number of days** if the number of days remaining is negative, eg -10. The **Entlmnt** field should be updated automatically.
- 4.12 Press **ENTER**. The **Remain** field will be automatically updated.
- 4.13 Click on  to move to the next data entry screen.

## 5 Employment Detail data entry screen

- ① As the person being promoted is already an existing employee the **Employment Detail** screen should already be completed.

**This screen SHOULD NOT be changed.**

**Task - Promotion/Regrading - Employment Detail**

Session Edit View Other Process Tools Display Help

**Employee**

**Dates**


Original Start	30/10/2000	SG006	...	Conversion
Current Start	30/10/2000	SG006	...	Conversion
Termination			...	
To Staff				
Probation				

**Additional**

Service	9 Years 6 Months 8 Days
Employee Type	
Self Service Unit	
Willing to Job Share	<input type="checkbox"/> TUPE <input type="checkbox"/> N
Notice Period	
No Of Current Posts	1

Service Breaks User Fields Notes Empl. History

Enter the employee's Original Start Date ADD NUM MD47

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

## 6 Fixed Pay Elements data entry screen

- ① As the person being promoted is already an existing employee the **Fixed Pay Elements** screen should already be completed. The asterisk (\*) in the **E** field indicates that the pay element has been ended. Check and update the information where necessary.

Seq	Post	Code	Desc	E	Start	Period	Amt	A	D	M	S
016	JF07002060	1000	Basic Pay	*	30/10/2000		1655.17				N
017	JF07002060	8100	CarParking	*	01/04/2007		6.50				N
018	JF07002060	9020	PASNAS	*	30/10/2000		Calculated				N
019	JF07004991	0040	NI C/O		01/12/2007		Calculated				N
020	JF07004991	1000	Basic Pay		01/05/2010		2210.25				N
021	JF07004991	1000	Basic Pay	*	01/08/2009		2022.75				N
022	JF07004991	1000	Basic Pay	*	01/10/2008		1954.08				N
023	JF07004991	1000	Basic Pay	*	01/08/2008		1861.00				N
024	JF07004991	1000	Basic Pay	*	01/05/2008		1806.83				N
025	JF07004991	1000	Basic Pay	*	01/12/2007		1754.17				N
026	JF07004991	3065	Broadband		01/02/2009		25.00				N
027	JF07004991	8100	CarParking	*	29/02/2008		6.50				N
028	JF07004991	8100	CarParking	*	01/12/2007		6.50				N
029	JF07004991	8180	CarParking	*	01/03/2008		10.00				N
030	JF07004991	9020	PASNAS	*	01/12/2007		Calculated				N

Buttons: Add, Change, Delete, Expand

Currency

Pseudo-Sequence Number for Index Paging: CHANGE NUM MD4E

6.1 This is the last screen in this process.

6.2 Click on  to **save** the Promotions task.

CTCONFIRM Confirm Action

General

Are you sure you want to Save?

Yes No

6.3 Click on **Yes**.

## 7 Standard Letters

Seq	Letter	Ver	Description	Let Opts	Copies
001	4+PROM	001	Level 4+ academic promotion	NOACT	1
002	4+PROM2	001	Level 4+ non-academic promotion	NOACT	1
003	CLINCONP	001	Clinical Consultants - promotion	NOACT	1
004	CLINPROM	001	Clinical Change of Title - Promotion	NOACT	1
005	PROFPROM	001	Professorial - promotion	NOACT	1
006	PROMOTE	001	Promotion	NOACT	1
007	REGRADE	001	Regrade	NOACT	1

Buttons: Add, Change, Delete, Expand, Exit

7.1 Click on the **Let Opts** field for the letter you want to produce and window in.

Seq	Letter	Ver	Description	Let Opts	Copies
001	4+PROM	001	Level 4+ academic promotion	NOACT	1
002	4+PROM2	001	Level 4+ non-academic promotion	NOACT	1
003	CLINCONP	001	Clinical Consultants - promotion	NOACT	1
004	CLINPROM	001	Clinical Change of Title - Promotion	NOACT	1
005	PROFPROM	001	Professorial - promotion	NOACT	1
006	PROMOTE	001	Promotion	MERGE	1
007	REGRADE	001	Regrade		

Buttons: Add, Change, Delete, Expand, Exit

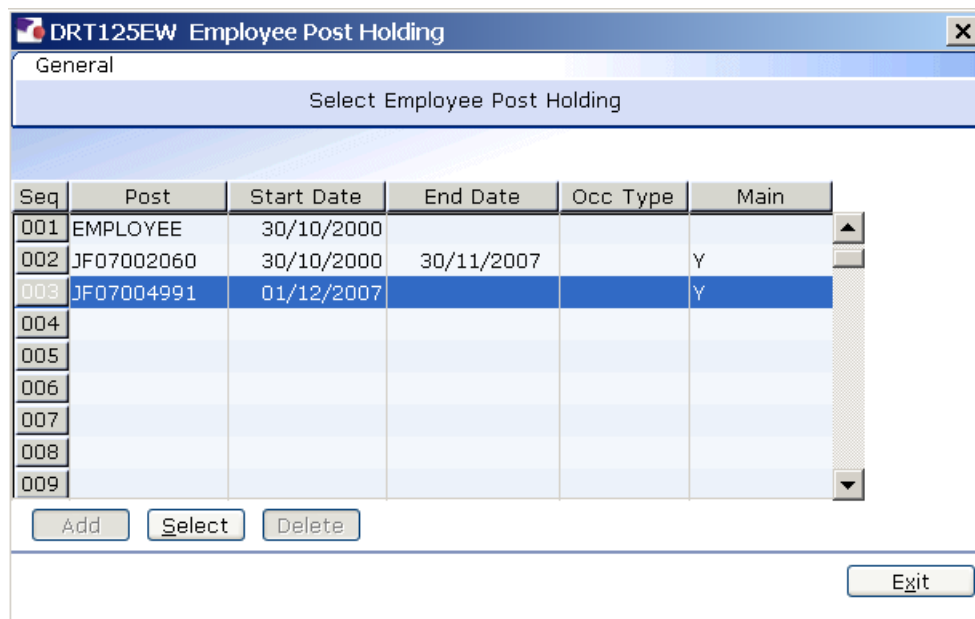
Dropdown Menu (for 'PROMOTE'):

Code	Desc	Long Description
MERGE	Manual	Immediate print with manual changes
NOACT	No Request	No action to be taken (no request)
PRINT	Print	Immediate request and print
PROMPT	Prompt	Prompt on commit for user action
QUEUE	Request	Request letter only
SAVE	Save	Save the merged letter

Right Panel: Permanent, Long Description

7.2 Click on **MERGE**.

7.3 Click on **Exit**.



**DRT125EW Employee Post Holding**

General

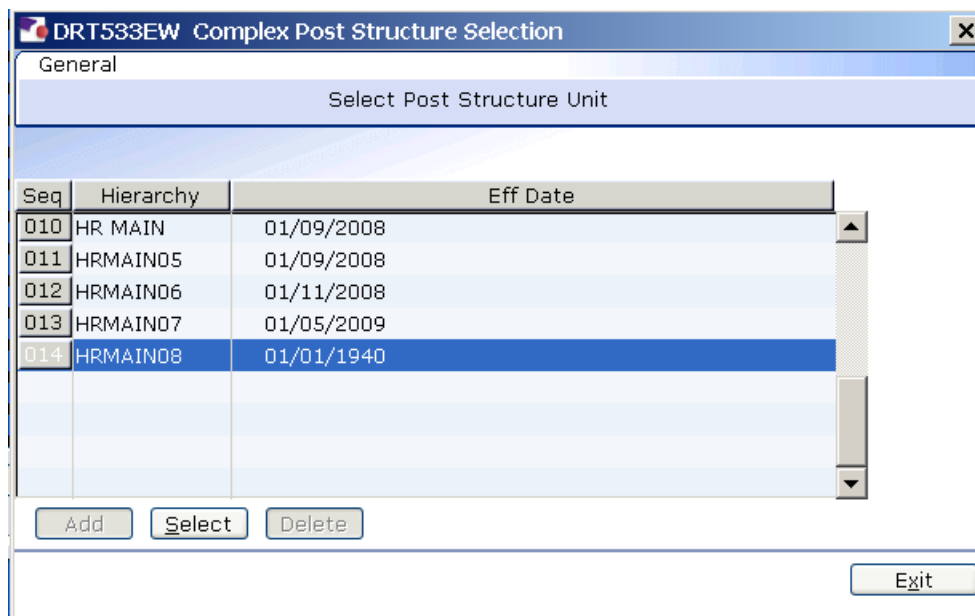
Select Employee Post Holding

Seq	Post	Start Date	End Date	Occ Type	Main
001	EMPLOYEE	30/10/2000			
002	JF07002060	30/10/2000	30/11/2007		Y
003	JF07004991	01/12/2007			Y
004					
005					
006					
007					
008					
009					

Add Select Delete

Exit

- 7.4 Click on the Post that this extension applies to (if they are a multi-post holder there will be more than 1 post listed in this screen).



**DRT533EW Complex Post Structure Selection**

General

Select Post Structure Unit

Seq	Hierarchy	Eff Date
010	HR MAIN	01/09/2008
011	HRMAIN05	01/09/2008
012	HRMAIN06	01/11/2008
013	HRMAIN07	01/05/2009
014	HRMAIN08	01/01/1940

Add Select Delete

Exit

- 7.5 Click on the Grade that this extension applies to (if they are a multi-post holder there will be more than 1 grade listed in this screen).

**DRT150EW Personnel Codeburst**

General

Select Person Codeburst

Seq	Hierarchy	Post Start Date
001	HR MAIN	01/12/2007
002	HRMAIN01	01/12/2007
003	HRMAIN02	01/12/2007
004	HRMAIN03	01/12/2007
005	HRMAIN04	01/12/2007
006	HRMAIN05	01/12/2007
007	HRMAIN06	01/12/2007
008	HRMAIN07	01/12/2007
009	HRMAIN08	01/12/2007

Add Select Delete

Exit

- 7.6 Click on the Post that this extension applies to (if they are a multi-post holder there will be more than 1 post listed in this screen).

**DRT168EW Employee Post Grade History**

General

Select Post Holding Grade History

Seq	Grade	Start Date	End Date
001	GRADE 3	01/05/2010	
002	GRADE 3	01/08/2009	30/04/2010
003	GRADE 3	01/10/2008	31/07/2009
004	GRADE 3	01/08/2008	30/09/2008
005	GRADE 3	01/05/2008	31/07/2008
006	GRADE 3	01/12/2007	30/04/2008

Add Select Delete

Exit

The screenshot shows a dialog box titled "MD109G3 Enter Pop Up Field Contents". It contains a table with two columns: "Seq" and "Pop Up Prompt". The table has five rows of data. Below the table are three buttons: "Add", "Change", and "Delete". At the bottom right of the dialog is an "Exit" button.

Seq	Pop Up Prompt
001	Please enter the job family
002	Enter whether this is a Sch/ Dept/Div
003	Please insert signatory's name
004	Please enter RA/PA's tel number
005	Please enter the with effect date

Buttons: Add, Change, Delete, Exit

- 7.7 Click in the first row and enter the signatory's job family.
- 7.8 Click in the second row and enter the signatory's job title.
- 7.9 Click in the third row and enter the signatory's name.
- 7.10 Click in the fourth row and enter the signatory's tel number.
- 7.11 Click in the fifth row and enter the effect date.
- 7.12 Click on **Exit**.



- 7.13 The extension letter will be produced in **Word** where you can print as normal.