
This work instruction was last updated: 30th March 2010

Recording ISA Checks on ResourceLink

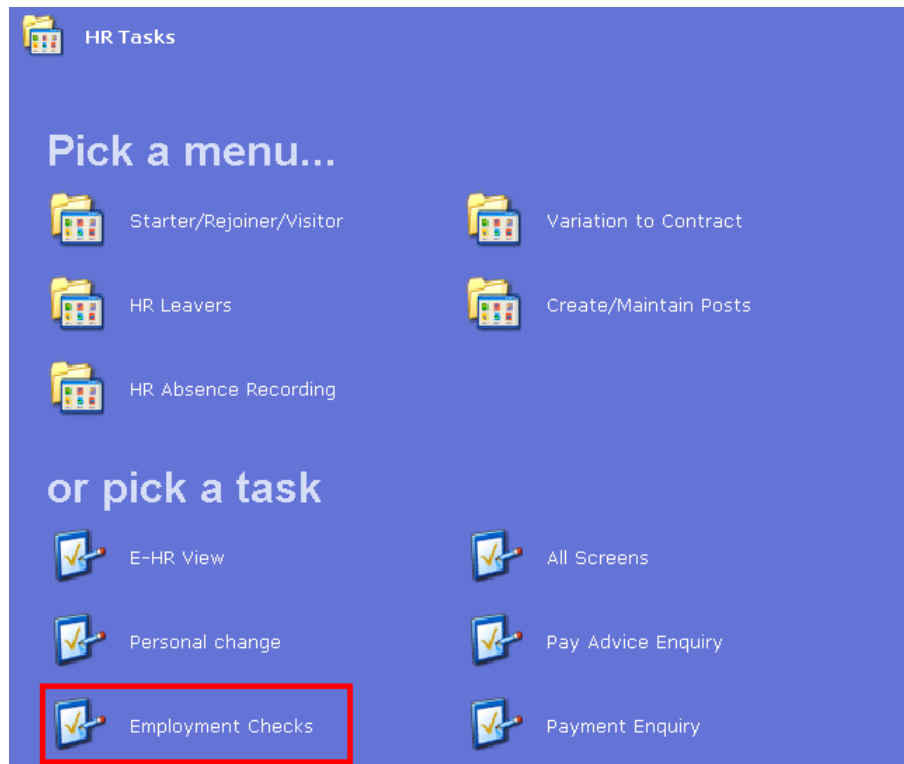
This Work Instruction describes how to record ISA (Independent Safeguarding Authority) checks on ResourceLink using the new screen Individual Employment checks.

- | | |
|---|-------------------------------------|
| 1 | Individual Employment Checks screen |
| 2 | Adding an ISA check |
| 3 | Updating an ISA check |

- The use of the new screen **Individual Employment checks** to record ISA is a temporary measure until NorthgateArinso release a standard screen for recording ISA data

1 Individual Employment Checks screen

- 1.1 The new **Individual Employment Checks** screen will be available from the **HR Tasks** Menu, within the task **Employment Checks**:



- 1.2 The screen will also be available in the following tasks:

- HR New Starter process
- Rejoiner
- Multi Post Starter
- Fees/Casual New Starter
- All Screens

- 1.3 Search Screen. The Employee Number, Surname, Search and Select options are highlighted.

Task - Lump Sum Payment - Employee Selection Screen

Employee Other Numbers Structure Saved List Employment

Match ☐ Exact ☐ Partial

Employee Number

Surname

Sex

Current Employee ☒

Previous Surname

Known As

Initials

Nat. Ins. No.

As at Date

Add Search

Surname	Init	Title	Emp Number	National ID Number	Start Date	For

Select Exit Save List

Enter an Employee Number CHANGE NUM IMD55522

- 1.4 Enter either the Employee Number or surname and search
- 1.5 Select the appropriate Staff Member from the List
- 1.6 The new **Employment Checks** task contains the following screens:
 - Personal Details
 - Individual Employment Check
 - Employee Work Permits
 - CRB Details
- 1.7 Individual Employment Check screen:

Task - Employment Checks - Individual employment checks

Session Edit View Process Tools Display Help

Employee 2074516 : MS L LASTIC

Selection
Start Date 30/03/2010 Search

Seq	Start Date	Type	Level	Clearance	Reg	Status	N
001	30/03/2010	CRB	B	30/03/2010			N

Add Change Delete Expand

- 1.8 The screen will display any existing employment checks, this includes **CRB** information for any staff who have a completed CRB record on ResourceLink (this pulls through automatically from the **CRB Details** screen) and 12 month checks for **Permission to Work in the UK**
- 1.9 You can expand any existing rows to see further details
- 1.10 Highlight the row and click on **Expand**

Employee 2074516 : MS L LASTIC

Selection
Start Date 30/03/2010 Search

Seq	Start Date	Type	Level	Clearance	Reg	Status	N
001	30/03/2010	CRB	B	30/03/2010			N

Renewal Date 30/03/2013
 Authorised by 1820303 N TOWNEND
 Reference numbers
 Registration body CRB CRB Type


2 Adding an ISA check

2.1 Click on **Add**

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

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

Check	Description
CRB	CRB
ISA	ISA Scheme
PTWUK	Permission to Work

- 2.4 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:

002	30/03/2010	ISA	
Renewal Date		Level	
Authorised by		CONACT	
Reference numbers		REGACT	

- 2.5 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

- 2.6 Window  into the **Status** field

Seq	Date	Status	Description

Add Change Delete

Exit

- 2.7 Click on **Add**

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

- 2.9 Window  into the **Status** field

Seq	Date	Status	Description
001	30/03/2010		
		Code	Desc
		Long Description	
		BARRED	Barred
		CONACT	Controlled Activity
		VERIFI	Verified

- 2.10 Select the current status of the ISA check e.g. Verified

Seq	Date	Status	Description
001	30/03/2010	VERIFI	VERIFIED
002			

Buttons: Add, Change, Delete, Exit

2.11 Press Enter and click on **Exit**

Fields: Renewal Date, Authorised by, Reference numbers, Registration body, Type


Buttons: Add, Change, Delete, Insert, Exit

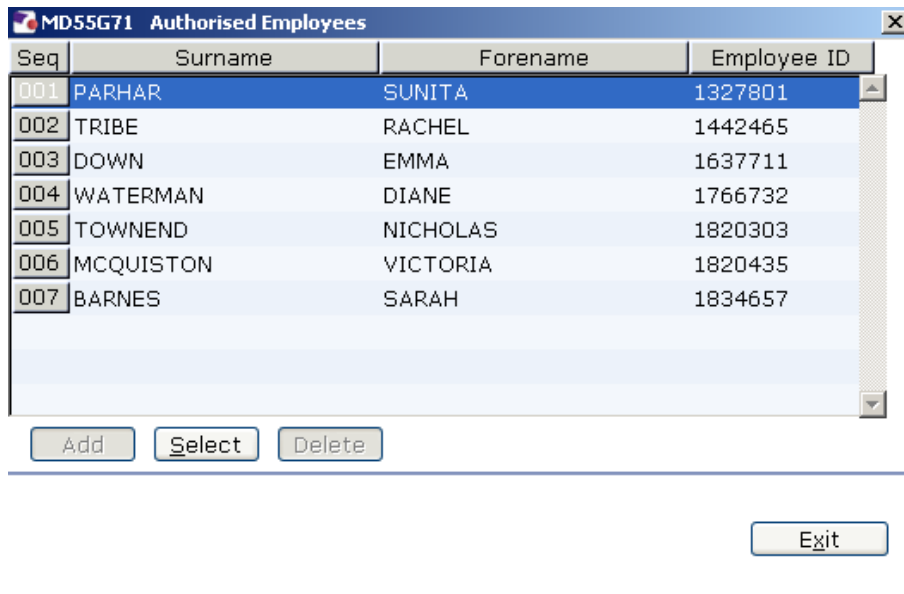
2.12 Enter through to the **N** (notes) field. If you have any additional notes you want to record against this check then window into the notes field, click on **Add**, enter the notes and then **Exit**

Line	Notes
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Buttons: Add, Change, Delete, Insert, Exit

2.13 Otherwise enter past the notes field

2.14 Window  into the **Authorised By** field



Seq	Surname	Forename	Employee ID
001	PARHAR	SUNITA	1327801
002	TRIBE	RACHEL	1442465
003	DOWN	EMMA	1637711
004	WATERMAN	DIANE	1766732
005	TOWNEND	NICHOLAS	1820303
006	MCQUISTON	VICTORIA	1820435
007	BARNES	SARAH	1834657

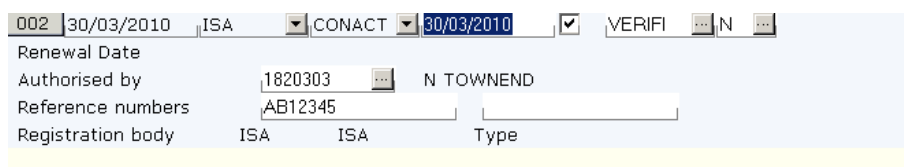
Buttons: Add, Select, Delete, Exit

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

2.16 Press Enter

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

2.18 The row of data is completed:



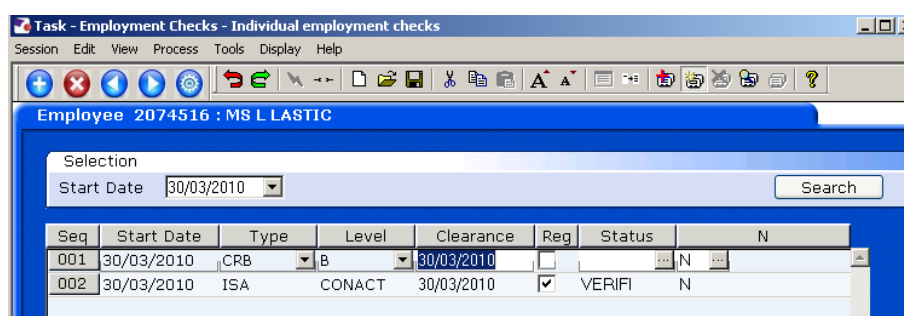
002 30/03/2010 ISA CONACT 30/03/2010 VERIFI N

Renewal Date

Authorised by 1820303 N TOWNEND

Reference numbers AB12345

Registration body ISA ISA Type



Task - Employment Checks - Individual employment checks

Session Edit View Process Tools Display Help

Employee 2074516 : MS L LASTIC

Selection

Start Date 30/03/2010 Search

Seq	Start Date	Type	Level	Clearance	Reg	Status	N
001	30/03/2010	CRB	B	30/03/2010		N	
002	30/03/2010	ISA	CONACT	30/03/2010		VERIFI	N

2.19 Click on **Save**



3 Updating an ISA check

3.1 From the **Individual Employment Check** screen...

Seq	Start Date	Type	Level	Clearance	Reg	Status	N
001	30/03/2010	CRB	B	30/03/2010	<input checked="" type="checkbox"/>	N	
002	29/03/2010	ISA	CONACT	29/03/2010	<input checked="" type="checkbox"/>	VERIFI	N

3.2 Select the **ISA** row by choosing the date

Seq	Start
001	30/03/2010
002	29/03/2010

3.3 Window into the **Status** field:

Seq	Start Date	Type	Level	Clearance	Reg	Status	N
001	29/03/2010	ISA	CONACT	29/03/2010	<input checked="" type="checkbox"/>	VERIFI	N

Seq	Date	Status	Description
001	29/03/2010	VERIFI	VERIFIED

Add Change Delete Exit

3.4 Click on **Add**

3.5 In the **Date** field enter the start date of the status change or the date you were informed of the change

3.6 Window into the **Status** field and select the new status:

Seq	Date	Status	Description
001	30/03/2010	VERIFI	VERIFIED
002	30/03/2010	...	

Code	Desc	Long Description
BARRED	BARRED	Barred
CONACT	CONACT	Controlled Activity
VERIFI	VERIFIED	Verified

3.7 Press Enter and then **Exit**

Seq	Date	Status	Description
001	29/03/2010	VERIFI	VERIFIED
002	30/03/2010	BARRED	BARRED
003			

Add Change Delete

Exit

3.8 Press Enter

Seq	Start Date	Type	Level	Clearance	Reg	Status	N
001	29/03/2010	ISA	CONACT	29/03/2010	<input checked="" type="checkbox"/>	BARRED	N

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

Line	Notes
01	

Add Change Delete Insert

Exit

3.10 Click on **Save**: