HR Re-Grading Process

This Work Instruction describes the HR Regrading Process for existing posts at the University which are to be regraded.
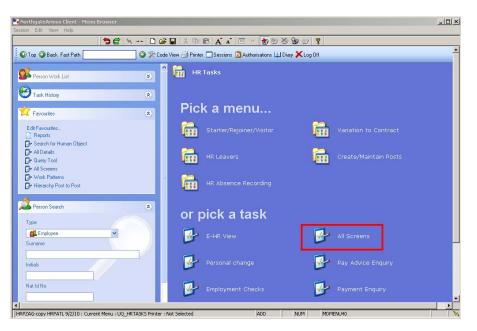
ⓘ You will need to **regrade the post** BEFORE you can **regrade the employee**. Check if other occupants are attached to the post first.

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 Finding Post Numbers on Employees

1.1 HR Tasks select All Screens

1.2 The following search form is made available

1.3 The Employee Number, Surname, search and select options are highlighted

1.4 Entering either the Employee Number or Surname select search.

1.5 Select the appropriate staff member from the list

1.6   Click on **Screens** ⚙.

1.7   The screen above will list all the screens available on a personnel record.

1.8   Scroll down the list and click on **Employee Current Post Holding**.

1.9   The system will move you directly into that screen:

1.10 If there is only row in the screen that means the employee is a single post holder. If there is more than one, they are a multi-post holder.

1.11 If they are multi-post and you are unsure which one is the correct fixed term contract post that requires extending, **Window in**[1] to the **Summary** field on the row of a post.
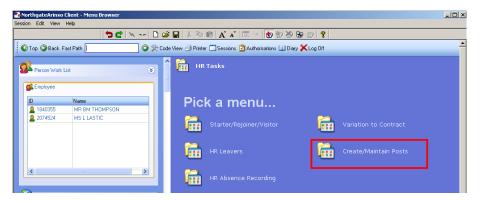

1.12 If this is the correct post, make a note of the Post number (10 digits).

1.13 Click on **Exit**.

1.14 Click on **Cancel** .

1.15 Click on **Exit**.

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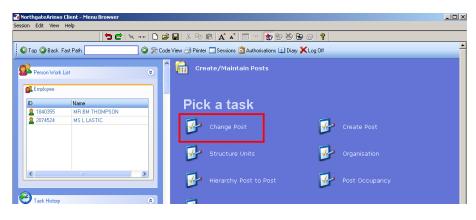
[1] Click on the at the end of the data entry field

2   Changing the Grade of a Post

💣⁂ Before you change the Grade on a post, **check if there are any other occupants within the post**. If there are no other occupants or all people attached to this post are being regraded then follow this work instruction.

💣⁂ If there are other occupants in this post that aren't being regraded you will need to create a new post with the new grade that applies to the one employee and transfer the employee into the new post. (See **Creating New Posts** and **Transfer** work instructions).

2.1   ResourceLink HR Home Page > HR Tasks > Create/Maintain Posts

2.2   Change Post

2.3   Enter the **number** of the Post that is to be re-graded.

2.4   Click on **Search** .

3 Checking the Occupants in a Post

3.1 Click on the **Post Occupants** Tab.

3.2 Press **Enter** to change the dates of search.

3.3 The screen will list all people attached to the post.

ⓘ If there is only 1 person attached to the post (the person who is being regraded) continue with regrading the post. If there is more than 1 person attached to the post and only 1 is being regraded, then cancel out of the task, **you will need to create a new post.**

4   Re-grading the Post

     ⓘ   If you are re-grading from grade 2 to 3 or from 3 to 4, there will be a change to the contractual hours worked. As it is not possible to enter a start date against the Service Condition / hours at post level, you should not make this change until the date comes to pass, otherwise it will change the person's hours immediately.

     💣 You will need to change the service conditions at **Post Holding** level as this is date driven.

     ⓘ   You can enter a change of hours with an effective date on the individual's record, under the **Current Post Holding** screen, but you will still need to change the hours at post level when the commencement date arrives.

     💣 Please remember to return to the post and change the working hours once the regrading date has been reached.

4.1   Click on the **Post Details** tab.

4.2   Click on **Grade**.
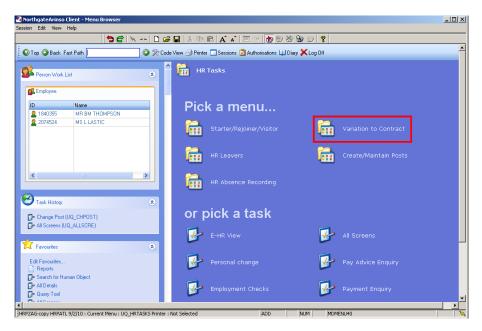
4.3   Click on **Change**.

4.4   Enter the **End Date** for this grading. This will be the day before the regrading takes effect.

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

4.5   **ENTER** through the rest of the fields.

4.6   Click on **Add** to add the new grade to the post.

4.7   Type in the **Start Date** for this grading. This will be the day after the **End Date** entered in step 4.4.

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

4.8   Press **ENTER** to move to the **Grade** field.

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

4.10   Select the new grade from the list.

4.11   **ENTER** through the remaining fields.

4.12   Click **Exit**.

4.13   Click on **Save**.

5 Starting the Regrading Process on the Employee

5.1 HR Tasks – Variation to Contract

5.2 Promotion/Regrading

5.3 The following search form is made available

5.4   The Employee Number, Surname, search and select options are highlighted

5.5   Entering either the Employee Number or Surname select search.

5.6   Select the appropriate staff member from the list

6 Personal Details data entry screen

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

6.1 Check you are working on the correct employee.

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

7   Current Post Holding data entry screen

ⓘ   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.

7.1   **Window in** to the **Detail** field of the post to which the regrading applies.

7.2   If the regrading means that the **Service Conditions** will be changing with
      the grade select the **Conditions** tab; otherwise go to step 7.13.

7.3   **Window in** to the **Service Cond ID** field.

7.4   Select the current Service Conditions (row with no end date) and click on **Change**.

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

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

7.6   **ENTER** through the remaining fields.

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

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

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

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

7.10   The following dialog box may be displayed:

Click **OK**.

7.11 **ENTER** through the remaining fields.

7.12 Click on **Exit**.

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

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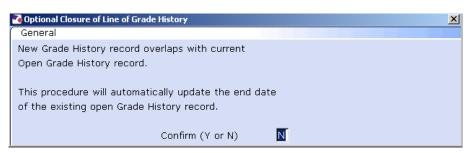
7.14 **Window in** to the **Pay Grade** field and click on **Add**. The following screen will be displayed:

7.15 Type the date that the regrading takes effect into the **Start Date** field.

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

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

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

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

7.18   The new grade should appear in the **Grade** field. If this is correct, **Enter** through the field.

ⓘ   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 to view the list of available grades:

ⓘ   Format of **Off Scale** Grades

Seq	Grade	Description
00055	OS GRADE1B	Off Scale Level 1B
00056	OS GRADE2A	Off Scale Level 2A
00057	OS GRADE2B	Off Scale Level 2B
00058	OS GRADE3	Off Scale Level 3
00059	OS GRADE4	Off Scale Level 4
00060	OS GRADE5	Off Scale Level 5
00061	OS GRADE6	Off Scale Level 6
00062	OS GRADE7	Off Scale Level 7
00063	OS PROF Z2	Off Scale Professorial Zone 2

ⓘ   Format of **Hourly Rate** Grades

Seq	Grade	Description
00028	GRD1B35.5H	Grade 1B 35.5 Hours
00029	GRD2A 36H	Grade 2a 36hours
00030	GRD2A35.5H	Grade 2a 35.5 Hours
00031	GRD2B 36H	Grade 2b 36 hours
00032	GRD2B35.5H	Grade 2b 35.5hours
00033	GRD3 35H	Grade 3 35hours

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

7.20   Press **Enter** to move to the **Reason** field, **window in** and select
"**Re-grading"** from the drop down list.

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

💣 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 on the next page.

So, if you are entering a new starter to the University who is starting between 1st August and 31st January then you can safely leave the "Override date" field blank as they will have been in post for over 6 months by 1st 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 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).

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.

7.22   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.

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

7.24   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

7.25   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.

7.26   Click on **Exit.**

7.27   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

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

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

7.29   Click on ▶ to move to the next data entry screen.

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

8   Holiday Entitlement data entry screen

ⓘ   As the person being regraded is already an existing employee the
       Holiday Entitlement screen should already be completed for their
       previous grade.

ⓘ   **Only complete this screen if the employee's Service Conditions
       have changed and this has affected their holiday entitlement. For
       example, the regrading is from Grade 3 to Grade 4.**

💣 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.

8.1   Select the record for the **current** leave year and click on **Delete**

       💣 DO NOT delete records for previous years.

8.2   Click on **Add** to add a new record.

8.3   Re-enter the line with the same start date but enter the **End Date** – this will
       be the day before the regrading takes effect.

8.4   Press **ENTER** to move through the remaining field on this row.

♣ If the employee uses MyView you will see any holiday that has already been approved in MyView between these dates:

Seq	Start Date	End date	Entlmnt	B/F	Extra	Taken	Remain
001	01/10/2007	30/04/2008	17.5	0.00	0.0	8.50	9.00

8.5   Click on **Add** to add a new record to reflect the regarding.

8.6   Type the date that the regrading takes effect into the **Start Date** field.

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

8.7   Press **ENTER** to move to the **End Date** field.

8.8   Type in the **End Date** for the current leave year – this will be 30 September of the current year.

8.9   Press **ENTER** to move through the remaining fields on this row

♣ If the employee uses MyView you will see any holiday that has already been approved in MyView between these dates:

Seq	Start Date	End date	Entlmnt	B/F	Extra	Taken	Remain
001	01/05/2008	30/09/2008	13.0	0.00	0.0	13.00	0.00
002	01/10/2007	30/04/2008	17.5	0.00	0.0	8.50	9.00

8.10   Click on ⏵ to move to the next data entry screen.

9 Employment Detail data entry screen

ⓘ   As the person being regraded is already an existing employee the **Employment Detail** screen should already be completed.

This screen SHOULD NOT be changed.

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

10   Fixed Pay Elements data entry screen

ⓘ   As the person being regraded 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. There should now be a new **Basic Pay** row that starts on the date of the regrading and reflects the employees monthly pay for their new grade.

10.1   This is the last screen in this process.

10.2   Click on **save**

11   Standard Letters

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

11.2   Click on **MERGE.**

11.3   Click on **Exit**.

11.4   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).

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

11.6   Click on the latest hierarchy

11.7   Click on the latest hierarchy

11.8   Select the grade

11.9   Complete the following fields as required

11.10   Click on **Exit.**

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