This work instruction was last updated: 8th April 2010

HR Re-Grading Process

This Work Instruction describes the HR Regrading Process for existing posts at the University which are to be regraded.

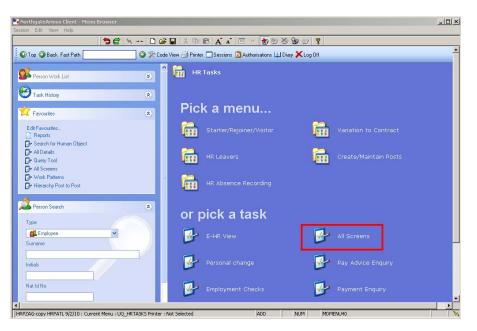
() You will need to **regrade the post** BEFORE you can **regrade the employee**. Check if other occupants are attached to the post first.

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
- 2 Changing the Grade of a Post
- 3 Checking the Occupants in a Post
- 4 Re-grading the Post
- 5 Starting the Regrading Process on the Employee
- 6 Personal Details data entry screen
- 7 Current Post Holding data entry screen
- 8 Holiday Entitlement data entry screen
- 9 Employment Detail data entry screen
- 10 Fixed Pay Elements data entry screen
- 11 Standard Letters

1 Finding Post Numbers on Employees

1.1 HR Tasks select All Screens



1.2 The following search form is made available

🏹 Task - HRZ/Additional Incremen	ts - Employee Sele	ction Screen	-		
		日日世世) 🏷 🗟 🕢 🤶 🤇		
Employee Other Nu Match C Employee Number	umbers Stru Evact C Pa		aved List	Employment	
Surname Sex Current Employee Y Previous Surname		Na	itials at. Ins. No. : at Date	24/03/2010	
Known As	Inits Title	Enn Number	National ID Num	Add	Search Start Date Fore
Sumame	inits inte	Emp Number		per	Start Date Fun
<u>S</u> elect E <u>x</u> it	Save <u>L</u> ist				
Enter an Employee Number				CHANGE	NUM MD55522

- 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

CTTASKVW View	Current Screens in Task	×
Seq Screen	Screen Name	Status
001 MD55S3	Personal Details	<
002 UVDFLT	Employee Fixed Pay Element Sum	
003 MD55S12	Person Equal Opportunities	
004 MD55S4	Person Relationship Summary	
005 MD47S1	Employment Detail	
006 MD47S7	Employee Post Holding History	
007 MD47S23	Employee Post Holding Costing	
008 MD49S2	Employee Basic Pay Details	
009 MD48S2	Employee Temporary Pay Element	
010 MD82S5	Employee Holiday Entitlement	
011 MD55S78	Asset Management	•
Add <u>S</u> ele	ect Delete	
		Exit

- 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:

	-	yee Current Post De					_ 🗆 ×
Session Edi	t View Process	Tools Display Help					
🖯 😢	00	56 N	🗅 🗃 🖬 🐰 🖣	🖻 🖻 🗛 🔺 🛛	= •• 💼 🗃	🎽 🗟 🗇 🦹	
Emplo	yee 1840355	: MR BM THOM	PSON				
- Cool	Start	Post	M Grade	Status N	l Datail		-
Seq		DD03006231	M Grade	Status N PS002 N		Summary	
	01/11/2000	0003000231	T GRADE 4	P3002 IN			-
			<u> </u>				<u> </u>
Ad	d Change	Delete Exp	band				
<u>і</u> я	Post Linking						
Decode Con		deve Develop			CU AN		MD47CLD
JPseudo-Seq	uence Number for Ir	ndex Paging			CHAN	E NUM	MD47S1B

- 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.

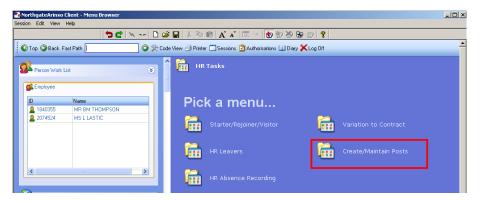
Summa	ary		
MD47L3A Employee Po	ost Holding Summary		X
General			
Post	DD03006231	General Dogsbody	
Job	MSA1B&2	Manag, Spec and Admin 1B & 2	
Employee Grade			
Post Grade	GRADE 4	Level 4	
Service Cond ID	MSA4+	Management Specialist & Administrative 4	
Emp Post Hold.	Reason	Description	
Start 01/	11/2008 PJL020	Casual to Permanent	
End			
Service In Post	1 Year 5 Mont	hs 8 Days Projected End	
Post Main Flag	Y	Suspended	
Contract Number			
Position Status	PS002	Part Time - Permanent	
Occupancy			
Location	HIGHFIELD	Highfield Campus, Southampton	
Wk Pattern	30MTWT	S0M7.5T7.5W7.5T7.5F0S0	
Contract Hours	30.00	Weekly Hours 30.00	
Source	CONTRACT	FTE .8333	
Pay Grade	GRADE 4	Level 4	
🕼 User Fields	🥼 Notes		
			Exit

- 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**.

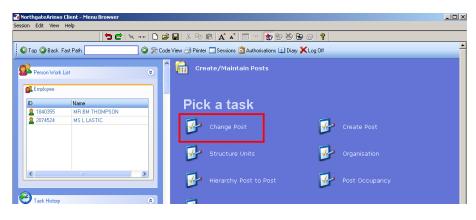
¹ Click on the at the end of the data entry field

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.

Southampton

🏹 Task - Change Post - Post Sel	ection Screen	
🔁 🖻 📉 🚦 🗋 📽 🔒	X 🖻 🖻 🖌 🖍 🗏 🖅 👘 🍎 🍎	0 ?
Search Match @ Exact Post	O Partial	
Post Search Current at 08/04/201	10 History ?	Add Search
Post Short D	Post Title Description	
<u>S</u> elect E <u>x</u> it		

2.4 Click on **Search** .

2	Task - Cha	inge P	ost - M	aintain P	ost Detai	ls									_ 🗆 ×
Ses	sion Edit	View	Other	Process	Display	Help									
	3 🕄) 🗅	¢ x	□	1	🖬 🐰 🛛	b R	A A	T→E	t d	ii) 🔓	3	
	Post DI	0030	0623:	L : Gen	eral Do	gsbody	/						Dele	te	
	Genera	al													
	Job Nu	mber			MSA1	B&2	• • •	Manag	, Spec a	and Adr	nin 1B &	2			
	Post					006231		Desc		N					
	Short (GDB		• • •								
	Long D				Gener	ral Dogs	body						_		
	Freeze	Star	t Date						e End D	ate					
	Grade				GRAD			evel 4							
	Curren				HIGHE			ighfield (•						
	Work P	atter	n		[36AM]	TWTF	-	S0M7.2	2T7.2W	7.2T7.2	F7.2S0				
	Add.	Info													
					PC011				<i>(</i> 0						
	Post Cl Start D					1 <u> </u>	_	inistrativ	/e/Supp ete Dat				_		
	Grade I					117097200	10		onable f	-					
	Freeze	-			Ľ				onable i rchy Vie	-					
	Freeze	Rech	uitmer	n.				Hierar	Criy Vie	W	1				
	🥥 Ft	e		0	Establ	lishment	t ;	🥖 Loca	tion	á	🄰 Grade				
	🦲 M	ore D	ets		(User F	ields		道 Note	s	1	🔰 Roles				
100															
E	nter delete r	node										ADD		NUM	MD3352

3 Checking the Occupants in a Post

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

Task - Change Post - List Post Occupants				<u> </u>
Session Edit View Process Display Help			¢a⇔ 9	
Post DD03006231 : General Dogsbody				
Selection				
From 08/04/2010 To			Sea	arch
Seq Employee Name	Start Date	End Date	N	
001 1840355 BM THOMPSON	01/11/2008	N		_
Enter a	Location or press WINDOW	/ to select		
Add Change Delete Expand				_
Add Change Delete Cxpand				_
Enter the date from which occupancy information is required		CHANGE	E NUM	MD3357

- 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, <u>you will need to create a new post.</u>

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.

🌠 Task - Change Post - Maintain Post Det	tails	_ 🗆 ×
Session Edit View Other Process Display	ay Help	
🔁 😢 🔇 🜔 🎯 🗅 🖻 🔌	n 🗅 📂 🖬 👗 🛍 💼 🗚 🖍 🗏 🖃 👘 🎒 🎒 🗐 🥑 💡	
Post DD03006231 : General D	ogsbody	
General		
Job Number MSA	A1B&2 📃 Manag, Spec and Admin 1B & 2	
	13006231 Desc N	
Short Desc GDB		
	eral Dogsbody	
Freeze Start Date	Freeze End Date	
0.000	DE 4 Level 4	
	HFIELD Highfield Campus, Southampton	
Work Pattern 36AM	MTWTF S0M7.2T7.2W7.2T7.2F7.2S0	
Add. Info		
Post Class PC0	11 🔽 Administrative/Support	
Start Date	01/09/2008 Obsolete Date	
Grade Usage Level	Pensionable Flag	
Freeze Recruitment	Hierarchy View	
📕 🌌 Fte 🥥 Estal	blishment 🛛 🌌 Location 🛛 🌌 Grade	
🥼 🧔 More Dets 🛛 😼 User	·Fields 🥖 Notes 🥖 Roles	
Enter Job Number or press WINDOW to select	ADD NUM	MD3352
Increasing the second s		JHD3352

🚺 Grade

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

4.2 Click on Grade.



MD:	33G4 Post Grade	History				
Seq	Start Date	Grade	End Date		Description	N
001	24/02/2010	GRADE 4 🛛 👱		Level 4		N <u></u>
002	01/11/2008	GRADE 2B	23/02/2010	Level 2b		N
003	01/09/2008	GRADE 2A	31/10/2008	Level 2a		N
A	.dd Change	e Delete E	xpand			
						E <u>x</u> it

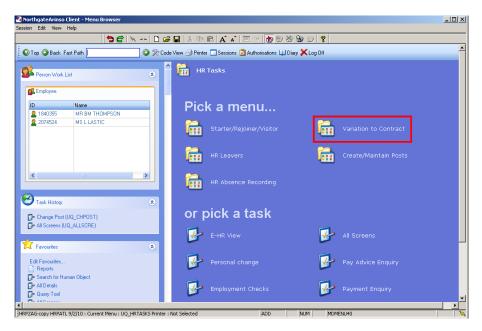
- 4.3 Click on **Change**.
- 4.4 Enter the **End Date** for this grading. This will be the day before the regrading takes effect.
 - Dates MUST be entered in the format ddmmyyyy. For example 16031975 for 16 March 1975.
- 4.5 **ENTER** through the rest of the fields.
- 4.6 Click on **Add** to add the 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.

MD35G3 Grade Select	ion 🔀
Selection	
Grade	
Obsolete Date	Search
	and the second se
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)
Add <u>S</u> elect	Delete
	E <u>x</u> it

- 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

🏹 NorthgateArinso Client - Menu Browser		_ _ _ _ _ _ _ _ _ _ _
Session Edit View Help		
) 🖆 🖬 🙏 🛍 💼 🔥 👗 🗇 👘 👘 👘 🖗	
💿 Top 🎱 Back Fast Path 🔤 🍄 🎘	🗞 Code View 🎒 Printer 🔲 Sessions 😰 Authorisations 💷 Diary 🗙 Lo	011
Person Work List	Variation to Contract	
Stephone Contraction Contraction		
ID Name 8 1840355 MR BM THOMPSON	Pick a task	
2074524 MS L LASTIC	Extension to Contract	Variation to Hours
	Transfers	Promotion/Regrading
	Change Contract End Date	Probation
Change Post (UQ_CHPDST)	Acting Up/Secondment	Lump Sum Payment
All Screens (UQ_ALLSCRE)	Casual/FTC to Permanent	HRZ/Additional Increments
Edit Favourites Preports Search for Human Object All Details C+ Quey Tool	Unpaid leave	
HRPZAG-copy HRPATL 9/2/10 : Current Menu : UQ_VARTC Print:	er : Not Selected ADD NUM	MDMENU40
There are oblighted use shere concidence using of Aurole Line	prov j provi	,

5.3 The following search form is made available



Tusk Tike/Hudicional Incremen	nts - Employee Sel	ection Screen			
╘ 💉 🕂 🗅 😂 🖬 🦉	5 🖻 🖻 🔺 🗚		ð ð 🔓 🔗 🦹		
Employee Other N Match C Employee Number		ructure	Saved List 🕴 E	mployment	
Surname Sex Current Employee Y Previous Surname Known As		1	initials Nat. Ins. No. As at Date	24/03/2010	Search
Sumame	Inits Title	Emp Number	National ID Numb	er 🦳	Start Date Fore

- 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

(1) 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.

ession Edit View Other Process Tools Display Help	
C C C C C C C C C C C C C C C C C C C	
Employee 2074524 : MS L LASTIC	
Title Details	
Legislation Type	
Surname LASTIC	
Title MS First Forename LUCY	
Other Forenames	
Prev. Surname	
Known As	
Generation	
Personal Details Gender F	
Gender F Date of Birth 30/06/1975 Age: 34 Years 9 Months	
Nat. Ins. No. TN300675F Case Number	
📈 Home Address 🛛 🥥 Cont. Addresses 🥥 Passport/Visa 🛛 🧔 Contact Tel	
🦉 Home Address 🥥 Cont. Addresses 💋 Passport/Visa 🛛 🥭 Contact Fei	
🥖 Email Address 🛛 🥥 Marital Status 🎾 User Fields 🛛 🥥 Notes	
Enter the person's Surname CHANGE NUM MD	5553

- 6.1 Check you are working on the correct employee.
- 6.2 Click on 2 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.

		i <mark>ng - Employee Curre</mark> Tools Display Help	ent Post Details				<u> </u>
()		5 🖻 🕅 😽	🗅 🚅 🔛 🕺 🖻		v 🖃 🚥 🕇) 👸 🎽 📾 📾 🦹	
Emplo	yee 2074524	: MS L LASTIC					
Seq	Start	Post	M Grade	Status	N Detail	Summary	
001	01/04/2010	DD03006231	Y GRADE 4	PS002	NEYE		
							V
Ad	ld Change	Delete Exp	and				
🦾 F	Post Linking						
Desude Com	Number Con T	dev Desites					MD47C1D
'seudo-Seq	juence Number for Ir	idex Paging				CHANGE NUM	MD47S1B

- 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.

ND47L3 Employee P	ost Holding Details	<u> </u>
Detail		
Post Job Employee Grade	DD03006231 MSA1B&2	General Dogsbody Manag, Spec and Admin 1B & 2
Post Grade	GRADE 4	Level 4
<u>G</u> eneral	<u>C</u> onditions	Misc Grade Contract
Service Cond ID Source Position Status	MSA1B&2 JOB PS002	 Management Specialist & Administrative 1 Part Time - Permanent
Occupancy Wk Pattern Source	30MTWT EMPPOST	SOM7.5T7.5W7.5T7.5F0S0
Contract Hours Source	30.00 CONTRACT	
道 T/S Template 🥖 Salary Planning		agement 🧔 User Fields Notes

7.3 Window in to the Service Cond ID field.

MD 🛐	55G27 Employee Se	ervice Conditions			×
Ger	neral				
Pos	t DD03006231	General Dogs	body		
From	n 01/04/2010) To			
		NINI CONTRACTOR OF	the second s		
Seq	Start Date	End Date	Service Condition	Description	Notes 📥
001	01/04/2010		MSA1B&2	MSA1B&2	N
002	I		•••		
					v
4	\dd Change	Delete Exp	and		
					E <u>x</u> it

- 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.

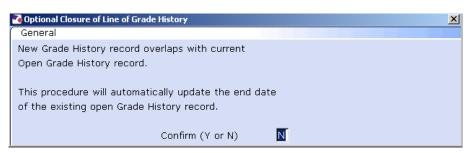
🔽 MD47L3 Employe	e Post Holding Details						X
Detail							
Post	DD03006231	General Do	ogsbody				
Job	MSA1B&2	Manag, Sp	ec and Admin 1	B&2			
Employee Grade	1						
Post Grade	GRADE 4	Level 4					
Cananal	Conditions		Grade		Contract	<u> </u>	
<u>G</u> eneral	Conditions	<u>M</u> isc	Giade	.	Co <u>n</u> tract		
Pay Grade	GRADE 2B	Level 2b					
Source	EMPPOST	2010/20					
Start Date	01/04/2010						
End Date							
Point	1	7					
Point Amount	17785.8	2					
Point Rate	11.370	D					
🥖 T/S Templat	:e 🧵 Perf Mana	aoment 創	User Fields	🥖 Not			
🧾 Salary Plann		gement 🤛		🥏 NO	.65	Exit	
🧫 oalary Flahin							

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

MD47G41 Employee Sp	inal Grade History		×
General Post DD03006231 From 01/04/201	General Dogsbody LO T.		
Seg Start Date	End Date Grade	Change Grade Reason Source Source	Point N
Seq Start Date 001 01/04/2010 Point Rate	GRADE 2B 11.3700 Enh.Rate	Reason Source Source POSTPL POSTGD Point Amount	17 N 17785.82
Override Date Override Step		Override Reason Carry Forward	
Bar Point	Enh.Rate	Current Bar Point	19
Override Date Override Step		Override Reason Carry Forward	
Bar Point Add Change	Delete Expand	Current Bar Point	<u> </u>
			E <u>x</u> it

- 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:

MD350	G3 Grade Selectio	n		×
Select	tion			
Grade				
Obsole	te Date		Search	
Seq	Grade	Description		
00001	AMCF	Research Consultant Fellow (Hon Consult)	<u> </u>	
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)	•	
Add	l <u>S</u> elect	Delete		
			E <u>x</u> it	

() 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.

	17G41 Employee Sp	inal Grade Hist	ory					×
Gen	eral							
Post	DD03006231	General D	ogsbody (
From	01/04/201	0 Т.						
		della series						
			(Chan		Grade		
Seq	Start Date	End Date	Grade	Reason	Source	Source	Point	N 📥
001	01/04/2010		GRADE 2B		POSTPL	POSTGD	17	V
Po	oint Rate	11.3700	Enh.Rate		Poir	nt Amount	17785.8	2
0	verride Date			Over	ride Reaso	on		
0	verride Step			Carry	Forward			
Ba	ar Point			Curre	ent Bar Po	pint	19	
002	08/04/2010		GRADE 3	GD001 💌	POSTPL	POSTGD	•••	
Po	oint Rate		Enh.Rate		Poir	nt Amount		
0	verride Date			Over	ride Reaso	on		
0	verride Step			Carry	Forward			
Ba	ar Point			Curre	ent Bar Po	oint		-
A	dd Change	Delete	Expand					
								Exit
								<u> </u>

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.

General Post DD03006231 Post Start 01/04/2010 Grade GRADE 3 Grade Start 08/04/2010 Point Start 08/04/2010 Seq Bar Point Removed 001 26 002	Level 3 Point 25	A
Post Start 01/04/2010 Grade GRADE 3 Grade Start 08/04/2010 Point Start 08/04/2010 Seq Bar Point Removed	Level 3 Point 25 Reason N Reason	A
Grade GRADE 3 Grade Start 08/04/2010 Point Start 08/04/2010 Seq Bar Point Removed 001 26	Level 3 Point 25 Reason N Reason	_ _
Grade Start 08/04/2010 Point Start 08/04/2010 Seq BarPoint Removed 001 26	Point 25 Reason N Reason	_ _
Point Start 08/04/2010 Seq BarPoint Removed	Point 25 Reason N Reason	_ _
Seq Bar Point Removed	Reason N Reason	
001 26		<u> </u>
001 26		
002 07		
002 27	N	
003 28	N	
004 29	N	
005 30	N	
006 31	N	
007 32	N	•
Add Change Delete		
		E <u>x</u> it

- 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.



Click on **D** to move to the next data entry screen. 7.29

● 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.

Task - Promotion/Regra Session Edit View Process			c Detail			
	11	- 🗅 🚅 🔛 🐰		. 🗐 🕬	b (a 🔏 🔂 (D ?
Employee 207452		;				
Seq Start Date	End date	Entimnt	B/F	Extra	Taken	Remain
001 01/04/2010	30/09/2010	91.5	0.00	0.0	0.00	91.50
						T
Add Change) Delete E	xpand				
🧔 Wor <u>k</u> Pattern						
Pseudo-Sequence Number for	Index Paging				LOOKUP	NUM MD8255

- 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	<u>^</u>
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	<u>^</u>
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 2 to move to the next data entry screen.

9 Employment Detail data entry screen

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

Task - Promotion/Regrading - Employment Detail Session Edit View Other Process Tools Display Help € 🔇 🜔 🎯 🖱 € 🔌 --- D 🗳 🖬 🐇 🖦 🖻 🔺 👘 🗒 🍪 🕸 🗇 💡 Employee 2074524 : MS L LASTIC Dates Original Start 31/03/2010 SG001 • • • • New Appointment Current Start 31/03/2010 SG001 New Appointment Termination To Staff Probation Additional Service 9 Days Employee Type -Self Service Unit -TUPE N Willing to Job Share • Notice Period No Of Current Posts 創 Service Breaks 道 User Fields 道 Notes 💓 Empl. History Enter the employee's Original Start Date ADD NUM MD47S1A

This screen SHOULD NOT be changed.

9.1 Click on 2 to move to the next data entry screen.

10 Fixed Pay Elements data entry screen

(1) 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.

	Post	Code	Desc	E	Start I	Period Amt A D M	
	EMPLOYEE	0001	Tax Paid		31/03/2010	Calculated	1
002	EMPLOYEE	0040	NI C/O		31/03/2010	Calculated N	
							-
A	dd Chang	e) Del	lete Expand				
_							_

- Pseudo-Sequence Number for Index Paging
- 10.1 This is the last screen in this process.
- 10.2 Click on save

11 Standard Letters

CLINCONP 001 Clinical Consultants - promotion NOACT	1
D03 CLINCONP 001 Clinical Consultants - promotion NOACT	1
D04 CLINPROM 001 Clinical Change of Title - Promotion NOACT	1
	1
DOS PROFPROM 001 Professorial - promotion NOACT	1
DD6 PROMOTE 001 Promotion NOACT	1
007 REGRADE 001 Regrade NOACT	1
	v
Add Change Delete Expand	

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

MD 🚺	103G2 Standard	Letter	s Attached to	the Task					>
Seq	Letter	Ver		Description					es
001	4+PROM	001	Level 4+ a	cademic pr	romotion		NOACT	1	4
002	4+PROM2	001	Level 4+ n	NOACT	1				
003	CLINCONP	001	Clinical Cor	Clinical Consultants - promotion					
004	CLINPROM	001	Clinical Cha	ange of Tit	le - Promotion	n	NOACT	1	
005	PROFPROM	001	Professoria	al - promot	ion		NOACT	1	
006	PROMOTE	001	Promotion				NOACT	1	
007	REGRADE 🔤	001	Regrade				NOACT 💌	1	
				Code	Desc	Long Description			
				MERGE	Manual	Immediate print with manual	changes		
				NOACT	No Request	No action to be taken (no re	quest)		
				PRINT	Print	Immediate request and print			
				PROMPT	Prompt	Prompt on commit for user a	ction		
-	dd Chang	e) [Delete E	QUEUE SAVE	Request Save	Request letter only Save the merged letter			

11.2 Click on **MERGE.**

11.3 Click on Exit.

ORT125EW Employe	e Post Holding				2
General					
	Select E	mployee Post H	lolding		
Seq Post	Start Date	End Date	Осс Туре	Main	
001 EMPLOYEE	20/11/2007				
002 99999999999	13/03/2006	11/02/2007		Y	
003 DD00-TBNK	20/11/2007	30/09/2008		Y	
004 EH03003948	12/02/2007	04/05/2007		Y	
005 DD00-TB06	01/10/2008	31/10/2008		Y	
006 DD03006231	01/11/2008			γ	
007					
008					
009					-
Add <u>S</u> elect	Delete				_
					E <u>x</u> it
					<u></u>

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).

MRT135EW	/ Post Grade			×
General				
		Select Post Grade		
-	and the second se			
Seq	Start Date	End Date	Grade	
001	24/02/2010		GRADE 4	A
002	01/11/2008	23/02/2010	GRADE 2B	
003	01/09/2008	31/10/2008	GRADE 2A	
				~
Add	Select Delete			
				E <u>x</u> it

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).

Complex	Post Structure Selec	ction	×
General			
	Select P	ost Structure Unit	
Seq Hierarchy		Eff Date	
001 HR MAIN	01/11/2008		
002 HR MAIN	01/09/2008		
003 HRMAIN05	01/09/2008		
004 HRMAIN06	01/11/2008		
005 HRMAIN07	01/05/2009		
006 HRMAIN08	01/01/1940		
007 HRMAIN09	01/01/1940		
			V
Add <u>Select</u>	Delete		
			E <u>x</u> it

11.6 Click on the latest hierarchy

Ger	heral			
		Select Pe	rson Codeburst	
Seq	Hierarchy		Post Start Date	
001	HR MAIN	01/11/2008		
002	HRMAIN05	01/11/2008		
003	HRMAIN06	01/11/2008		
004	HRMAIN07	01/11/2008		
005	HRMAIN08	01/11/2008		
006	HRMAIN09	01/11/2008		
				V
ļ	\dd <u>S</u> elect	Delete		
				E <u>x</u> it

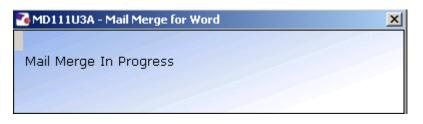
11.7 Click on the latest hierarchy

🛀 DR 1	T168EW Employe	e Post Grade Histo	ry		×			
Gen	ieral							
	Select Post Holding Grade History							
a construction of the second								
-								
Seq	Grade	Start Date		End Date				
001	GRADE 4	24/02/2010						
002	GRADE 2B	01/02/2010	23/02/2010					
003	GRADE 2B	01/10/2009	31/01/2010					
004	GRADE 2B	01/08/2009	30/09/2009					
005	GRADE 2B	01/03/2009	31/07/2009					
006	GRADE 2A	01/11/2008	28/02/2009					
					V			
A	dd <u>S</u> elect	Delete						
					E <u>x</u> it			

- 11.8 Select the grade
- 11.9 Complete the following fields as required

MD1	09G3 Enter Pop Up Field Contents	×
Seq	Pop Up Prompt	
001	Please enter the job family	
002	Enter whether this is a Sch/ Dept/Div	
003	Please enter signatory's job title	
004	Please insert signatory's name	
005	Please enter RA/PA's tel number	
Ac	id Change Delete	
	E <u>x</u> it	

11.10 Click on **Exit.**



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