

This work instruction was last updated: 15th Oct 2012

HR Rejoiner Process

This Work Instruction describes the HR Rejoiner Process to be used when a starter is a past employee of the University, i.e. they are already on the system as a Leaver.

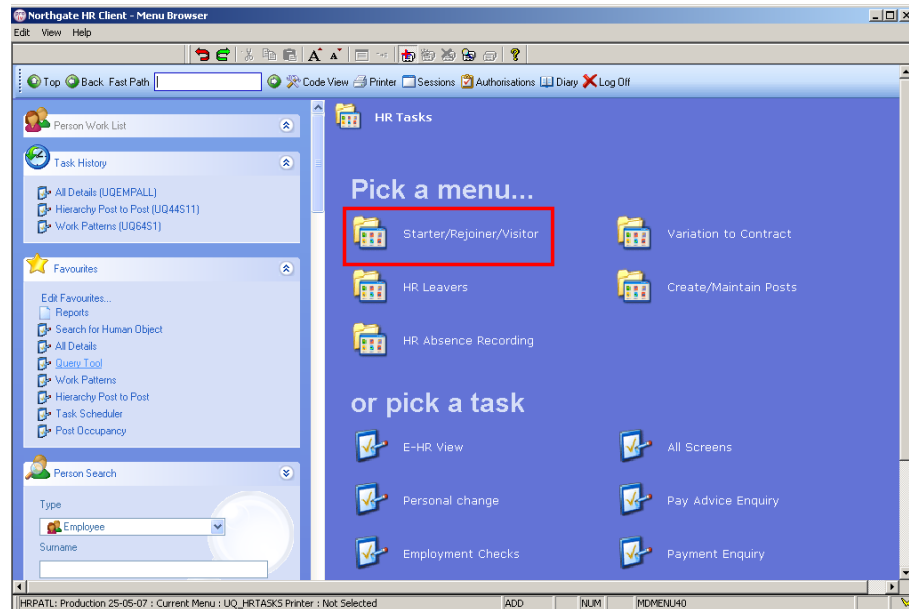
- ❗ If the person is an existing employee and they are to be assigned to an additional post (multiple contracts) you will need to enter them on the system using the **Multi-Post Starter** task.
- ❗ If the person is a new starter to the University and has no previous employment with the University, you will need to enter them on the system using the **HR New Starter** task.

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.

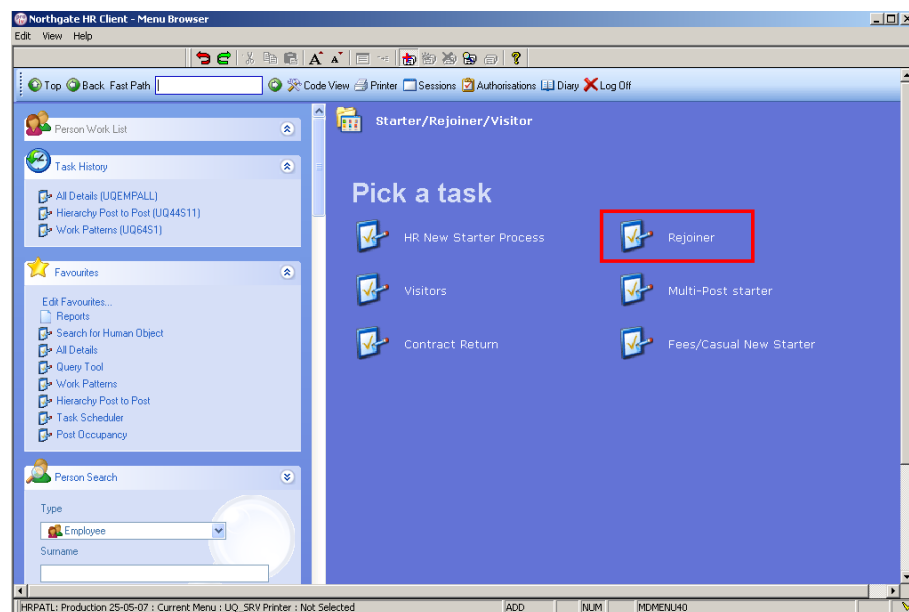
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1 Setting up a Rejoiner

1.1 HR Tasks > Starter/Rejoiner/Visitor



1.2 Starter/Rejoiner/Visitor > Rejoiner



1.3 The following search form is made available

Task - HRZ/Additional Increments - 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: 24/03/2010

Previous Surname:

Known As:

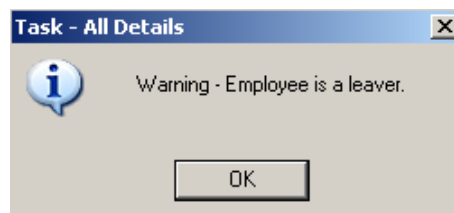
Add Search

Surname	Inits	Title	Emp Number	National ID Number	Start Date	For

Select Exit Save List

Enter an Employee Number CHANGE NUM MD55522

- 1.4 The Employee Number, Surname, search and select options are highlighted
- 1.5 Entering either the Employee Number or Surname select search.
- 1.6 Select the appropriate staff member from the list
- 1.7 The screen below should appear to highlight to the user that this employee has left the University.



- 1.8 Click on **OK**.

2 Personal Details data entry screen

- 2.1 Personal Details should already be completed from the employee's previous employment at the University. If certain fields have changed update the information accordingly.

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

- 2.2 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.

Click **Exit**.

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

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

- 2.4 Click on **Email Address** to enter the employee's email address (this should be a University of Southampton email address).

- 2.5 Ensure that the **Preferred Method** box is ticked, otherwise system generated emails (relating to MyView, for example) will not be sent.
- 2.6 Click on **Exit**.
- 2.7 Click on **Marital Status** to check and, where necessary, update the relevant information.

Click on **Add** to enter any changes to data in new rows.

[illegible]

- 2.8 Click on **User Fields** to enter the **Unique Identifier** (not used at present) and the **Pay Point** for their new post.

MD00G32 Simple User Defined Field Data

Field Label	Field Contents	Description
Unique Identifier	A0000000020360	
Pay Point	37SE	Human Resources (Buil
Trade Union Opt Out		
Research Passport ID		
Res Passport Expiry		

Unique Identifier A0000000020360

Exit

MD37G4A Narrative Table Search

Search

Narr Code

Seq	Code	Desc	Long Description
-----	------	------	------------------

Exit

Press the **ENTER** key to display the list of available Pay Points.

MD37G4A Narrative Table Search

Search

Narr Code

Seq	Code	Desc	Long Description
001	00	00	Post or Collect
002	02	02	Maternity
003	03	03	Living Abroad
004	03C	03C	Living Abroad + Cheque
005	04	04	Place in Personal File
006	05	05	Send out every December
007	06	06	Send out every June and December
008	07	07	Leaver - Send with P45
009	09	09	Pensionable Fee Payment

Add Select Delete

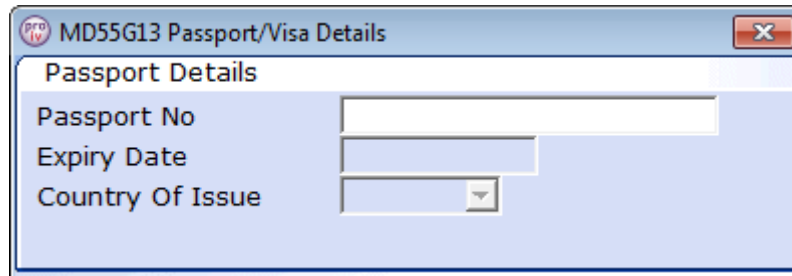
Exit

Click on the required **Pay Point**.

2.10 With the Pay point added, click on **Exit**.

2.11 Click on **Passport/Visa**.

- ☛ To comply with RTI (Right To Information) and to assist the UK Border Agency we need to the staff members Passports details entered and also a legible copy put onto DocStore.



MD55G13 Passport/Visa Details

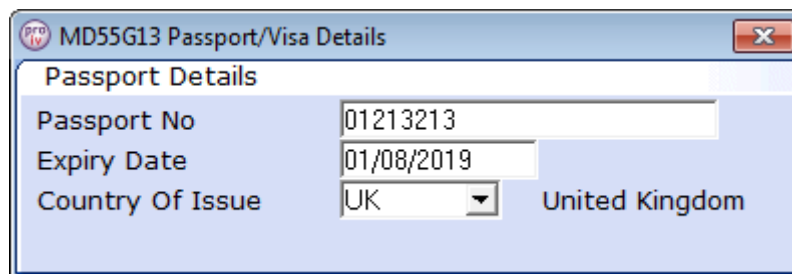
Passport Details

Passport No

Expiry Date

Country Of Issue

2.12 Complete the 3 fields.



MD55G13 Passport/Visa Details

Passport Details

Passport No

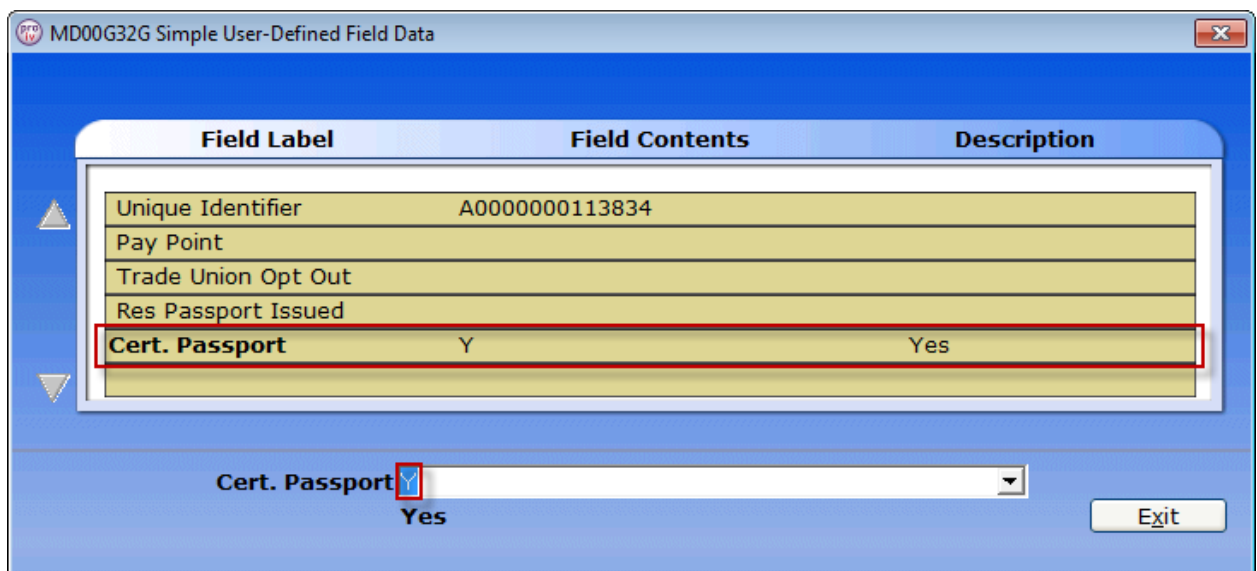
Expiry Date

Country Of Issue United Kingdom

2.13 Once the details have been added, click on Exit (at the bottom).

2.14 Click onto User Fields

2.15 If you have added a certified copy of the staff members passport to DocStore, then enter **Y** into the “**Cert. Passport**”, otherwise leave this blank.




MD00G32G Simple User-Defined Field Data

Field Label	Field Contents	Description
Unique Identifier	A0000000113834	
Pay Point		
Trade Union Opt Out		
Res Passport Issued		
Cert. Passport	Y	Yes

Cert. Passport Yes

Exit

2.16 Press enter for it to accept the Y and then click on Exit.

2.17 Click on  to move to the next required screen.

3 Equal Opportunities data entry screen


The screenshot shows a software window titled "Task - Rejoiner - Equal Opportunities Screen". It contains a form for an employee's details. The "General" section includes fields for Gender (Male), Marital Status, Date Of Birth, Age (29 Years 4 Months), Current Start (02/04/2007), and Service (4 Years 7 Months 2). The "Details" section includes dropdown menus for Ethnic Origin (set to 90, Not Known), Country of Birth, Religion, Nationality/Citizenship (set to GB, United Kingdom), Occupational Group, and Sexual Orientation. The "Personal Dets." section includes Disabled Flag (set to N), Disability 1 (set to 00), Disability 2 (set to XX), and First Aider (set to N). At the bottom, there are icons for User Fields, Notes, Health Details, Special Aids, Incapacity, and Work Adaptations. A status bar at the bottom says "Enter Ethnic Origin or press WINDOW to select (ETHNIC)".

3.1 Complete the following fields only:

Ethnic Origin
Nationality/Citizenship
Disabled Flag (if necessary)
First Aider (if necessary)

3.2 If the Disabled Flag is set to **Y**, you **MUST** complete the incapacity information by clicking on **Incapacity**.

The screenshot shows a window titled "MD55L15 Illness or Incapacity Reasons". It contains a table with columns: Seq, Code, Description, Reg, and No... The "No..." column has a dropdown arrow. Below the table are buttons for "Add", "Change", and "Delete". At the bottom right is an "Exit" button. A red box highlights the "No..." dropdown in the first row of the table.

3.3 Click on **Add**  to enter the details of the incapacity.

Seq	Code	Description	Reg	No...
001				

Code	Desc	Long Description
IR001	SENSORY	Sensory Impairment
IR002	MOBILITY	Mobility Impairment
IR003	MENTAL HEA	Mental Health
IR004	MEDICAL	Medical Condition
IR005	LEARNING	Learning Difficulty
IR006	SPEECH	Speech Impairment

Add Change Delete

Exit

- 3.4 Click on the drop down arrow in the **Code** field to display a list of incapacity reasons.
- 3.5 Select the appropriate incapacity reason.
- 3.6 The Description will appear as you **ENTER** through the fields.
- 3.7 If the disability has been registered type **Y** in the **Reg** field.
- ☛ Only window into the **Notes** field (top right) if you need to record conditions that school managers would need to be aware of. i.e. Diabetes.

Line	Notes
1	

Add Change Delete Insert


Exit

- 3.8 Click **Exit**.

Seq	Code	Description	Reg	No...
001	IR001	Sensory Impairment	Y	Y

Add Change Delete Exit

3.9 When you have completed the entry click on **Exit**.

3.10 Click on  **User Fields** to complete **HESA information**.

Field Label	Field Contents	Description
Date First App HEI	02/04/2007	
Previous Employment	03	Other Education Insti
Previous HEI		
Highest Acad Qual	11	First Degree
Academic Disp 1	Q320	Q320,English Literatu
Academic Disp 2	XXXX	Default

Date First App HEI 02/04/2007 Exit

3.11 In **Date 1st App CurrHEI** – This date is taken from the ‘Employment details’ screen. To find this, exit out of User Defined fields and go to the ‘Employment details’ tab. Copy the Current start date across from here into the ‘Date First App HEI’.

⚠ Please note, if there is a date in the ‘To Staff’ field then this will override the date in ‘Current Start date’, so in this instance use this one.

3.12 Click on **Previous Employment** and click on the drop down.

3.13 Press **Enter**.

Seq	Code	Desc	Long Description
001	01	Another HE	Another HEI in UK
002	02	HEIOversea	HEI in an overseas country
003	03	Other Ed	Other Education Institution in UK
004	04	Oth ED	Other Education Institution in Overseas
005	05	RsInstit	Research Institution in the UK
006	06	Res Ins	Research Institution Overseas
007	07	Student UK	Student UK
008	08	St Oversea	Student in Overseas Country
009	09	NHS/GEN	NHS/General medical or gen dental

- 3.14 Scroll down the list and click on the previous employment of the new starter.
- 3.15 Click on the drop down in the **Previous HEI** field if the new starter has previously worked at another higher education institute.
- 3.16 Press **Enter**.

Seq	Code	Desc	Long Description
001	0001	0001	The Open University
002	0002	0002	Cranfield University
003	0003	0003	Royal College of Art
004	0004	0004	College of Guidance Studies
005	0006	0006	The Royal College of Nursing
006	0007	0007	Bishop Grosseteste College
007	0008	0008	Bretton Hall College of HE
008	0009	0009	Buckinghamshire New University
009	001	001	The Open University

- 3.17 Scroll down the list and click on the new starters previous HEI.
- 3.18 Click on the drop down of the **Highest Acad Qual** field.
- 3.19 Press **Enter**.

Seq	Code	Desc	Long Description
001	01	Doctorate	Doctorate
002	02	Oth HghDeg	Other Higher Degree
003	03	PGCE	PGCE
004	09	Oth PostGr	Other Postgraduate Qualification
005	11	FirstDegre	First Degree
006	12	FrstDegQT	First Degree with Qualified Teacher Stat
007	19	Oth Qual	Other Qualifications at First Degree Lev
008	21	Dipof HE	Diploma of HE
009	22	HND/HNC	HND/HNC

3.20 Scroll down the list and click on the Highest Academic Qualification that the new starter holds.

3.21 Click on the drop down of the **Academic Disp 1** field.

3.22 Press **Enter**.

Seq	Code	Desc	Long Description
001	A000	A000	A000, Medicine and Dentistry
002	A100	A100	A100, Pre-clinical Medicine
003	A200	A200	A200, Pre-clinical Dentistry
004	A300	A300	A300, Clinical Medicine
005	A400	A400	A400, Clinical Dentistry
006	A900	A900	A900, Others in Medicine and Dentistry
007	A990	A990	A990, Medicine and Dentistry not elsewhere
008	B000	B000	B000, Subjects allied to Medicine
009	B100	B100	B100, Anatomy, Physiology and Pathology

3.23 Scroll down the list and click on the 1st Academic Discipline of the new starter.

3.24 Click on the drop down of the **Academic Disp 2** field.

3.25 Press **Enter**.

Seq	Code	Desc	Long Description
001	A000	A000	A000,Medicine and Dentistry
002	A100	A100	A100,Pre-clinical Medicine
003	A200	A200	A200,Pre-clinical Dentistry
004	A300	A300	A300,Clinical Medicine
005	A400	A400	A400,Clinical Dentistry
006	A900	A900	A900,Others in Medicine and Dentistry
007	A990	A990	A990,Medicine and Dentistry not elsewhere
008	B000	B000	B000,Subjects allied to Medicine
009	B100	B100	B100,Anatomy, Physiology and Pathology

3.26 Scroll down the list and click on the 2nd Academic Discipline of the new starter.

3.27 Click on the drop down in the **Regulatory Body** field.

3.28 Press **Enter**.

Seq	Code	Desc	Long Description
001	00	NtCurrReg	Not currently registered to practice
002	01	GMC	General Medical Council
003	02	GDC	General Dental Council
004	03	GOC	General Optical Council
005	04	RPSGB	Royal Pharmaceutical Society of GB
006	05	PSNI	The Pharmaceutical Society of Nireland
007	06	NMC	The Nursing and Midwifery council NMC
008	07	HPC	Health Professions Council
009	08	GSCC	General Social Care Council

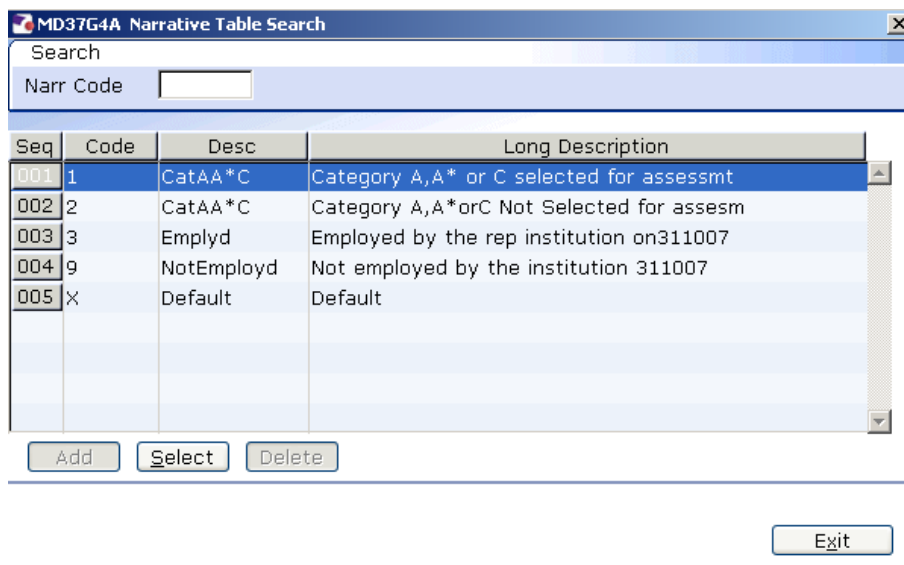
3.29 Scroll down the list and click on the new starter's Regulatory Body.

3.30 Leave the **Date Left HEI** field blank – when a leaver action is entered for this employee the screen will auto complete.

3.31 Leave the **Leaving Destination** blank (this is used when an employee leaves).

3.32 Click in the drop down of the **Active Last Res** field.

3.33 Press Enter.

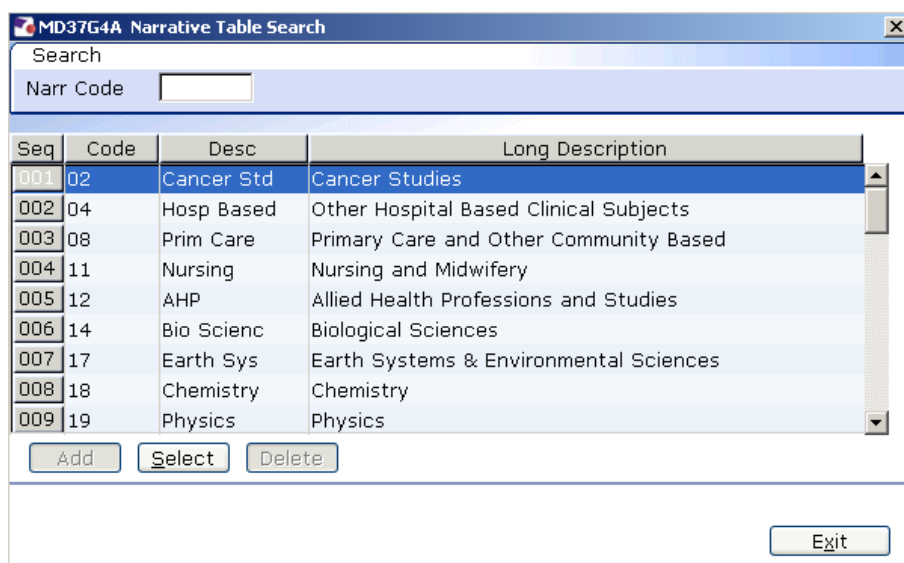


Seq	Code	Desc	Long Description
001	1	CatAA*C	Category A,A* or C selected for assessmt
002	2	CatAA*C	Category A,A*orC Not Selected for assesm
003	3	Emplyd	Employed by the rep institution on311007
004	9	NotEmployd	Not employed by the institution 311007
005	X	Default	Default

3.34 Click on the description that applies to the new starter.

3.35 Click in the drop down in the **Unit of Assessment** field.

3.36 Press Enter.



Seq	Code	Desc	Long Description
001	02	Cancer Std	Cancer Studies
002	04	Hosp Based	Other Hospital Based Clinical Subjects
003	08	Prim Care	Primary Care and Other Community Based
004	11	Nursing	Nursing and Midwifery
005	12	AHP	Allied Health Professions and Studies
006	14	Bio Scienc	Biological Sciences
007	17	Earth Sys	Earth Systems & Environmental Sciences
008	18	Chemistry	Chemistry
009	19	Physics	Physics

3.37 Scroll down the list and click on the Unit of assessment that applies to this new starter.

3.38 When you have completed all the HESA fields that apply to this employee, click on **Exit**.

3.39 Move to the next required screen.

4 Employment Detail data entry screen

- 4.1 Click in the **Current Start** field and overtype the date with the new start date for this Rejoiner.
 ☛ You MUST NOT change the **Original Start** date.
- 4.2 Press **ENTER**.
- 4.3 In the adjacent field window in and select the reason **SG004 – Rejoiner to University** and press **ENTER**.
- 4.4 If the Rejoiner was previously in a paid post, i.e. Main Payroll or Fees/Casual **AND** they were paid within the current tax year (between April & March), then you should get the following message. Click on Exit

- ☛ This ensures that any Year to Date figures are adjusted accordingly.

- 4.5 Press Enter down to the **Notice Period** and update where appropriate.
- 4.6 Enter down through the remaining fields on the screen to take you back to the top.
- 4.7 The screen will be refreshed and the **Termination Date** and **Reason** will be removed (as shown below):


Task - Rejoiner - Employment Detail

Session Edit View Other Process Tools Display Help

Employee

Dates

Original Start	30/08/2008	SG006	Conversion
Current Start	01/05/2010	SG004	Rejoiner to University
Termination			
To Staff			
Probation			

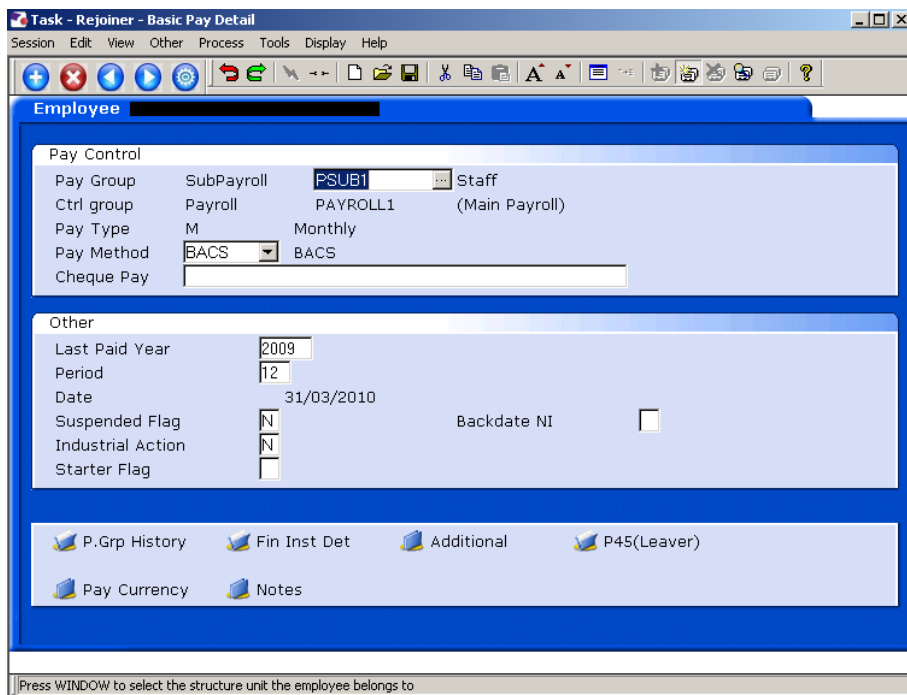
- 4.8 To check the rejoiner's breaks in service click on  Service Breaks at the bottom the screen.

Seq	Break Start	Break End	Days	Break Rsn	Return Rsn	S	S.C	Pens	Red	Rb	U1	U2	N
001	01/04/2010	30/04/2010	30	LG030	SG004	N	N	N	N	N	N	N	N

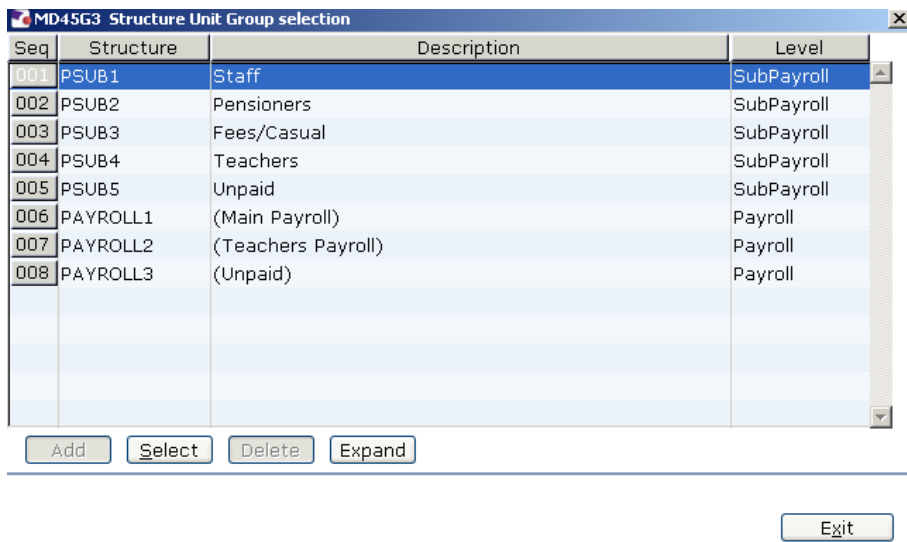
- 4.9 Click on **Exit**.
- 4.10 Move to the next required screen.

5 Basic Pay Details data entry screen

 You do not need to change the **Pay Group** if it is already set to PSUB1.



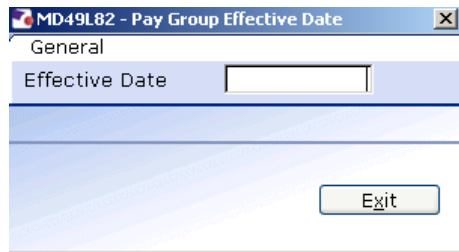
5.1 **Window in to the Pay Group** field if they are attached to a different pay group in their new post.




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

5.2 Select the correct PSUB Pay Group.

5.3 Press **ENTER**. The following dialog box will appear:



- 5.4 Type the **start date** into the **Effective Date** field and press **ENTER**.
- ❗ If the employee is full time, the start date will be the Commencement Date on the HR Form.
 - ❗ Dates **MUST** be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.
- 5.5 Check the **Pay Method** field, change to **Cheque** if necessary. Payroll will change to BACS when they enter the rejoiners bank details.
- 5.6 Enter **Y** in the **Suspended Flag** field (*for single post employees only*). This will suspend them from being paid until their contract is signed and returned. See **Contract Returned** Work Instruction for guidance on removing this flag.
- 5.7 Click on  P45(Leaver) if you wish to see when this employees P45 was last printed. Click on **Exit** to move back to the main screen.
- 5.8 Move to the next required screen.

6 Contract Details data entry screen

- Only used for employees with **Fixed Term Contracts** (FTC). If the employee is permanent click move to the next required screen.

6.1 Press **ENTER** to pass the **Contract Type** field.

6.2 Click on **Add**.

- If the employee has previously been on an FTC with the university there will be existing rows of information within this screen.

Seq	Contract No	Start Date	End Date	Contract Type	Po...	UDFs	Notes
001	01001471	02/04/2007	31/03/2010	FTC01A	N	N	N
002	01006198	02/04/2007	31/03/2010	FTC02A	N	Y	N

6.3 ResourceLink will generate a Contract Number.

6.4 Press **ENTER**.

6.5 Enter the **Start date** of the FTC.

If the employee is full time the start date will be the Commencement Date on the HR Form.

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

6.6 Press **ENTER**.

6.7 **Window in** to the **Contract Type** field. The following list will be displayed.

Seq	Cont Type	Short Desc
001	FTC01A	FTC01POSTA
002	FTC01B	FTC01POSTB
003	FTC01C	FTC01POSTC
004	FTC01D	FTC01POSTD
005	FTC02A	FTC02POSTA
006	FTC02B	FTC02POSTB
007	FTC02C	FTC02POSTC
008	FTC02D	FTC02POSTD
009	FTC03A	FTC03POSTA
010	FTC03B	FTC03POSTB
011	FTC03C	FTC03POSTC
012	FTC03D	FTC03POSTD

6.8 Select the **FTC01A** Contract Type.

- ① FTC01B is used for staff with an FTC on a second post (see **Multi Post Starter** work instruction)

6.9 Press **Enter** through to the **UDF's** field.

6.10 Window into **UDF** Po... **UDFs** Notes

Field Label	Field Contents	Description
Reason for FTC		
	Redeployment Request	
	Redeployment Success	
	Reason for end FTC	

Reason for FTC:

Exit

6.11 Click on the drop down against the **Reason for FTC** field

Search

Narr Code:

Seq	Code	Desc	Long Description

6.12 Enter through the **Narr Code** field

Search

Narr Code:

Seq	Code	Desc	Long Description
001	OR001	SPEC/EXP	Specialist Expertise/Recent Experience
002	OR002	STAFFABS	Staff Absence Where Return to Post
003	OR003	SECOND	Secondment/Career Development
004	OR004	SPEC PRAC	Specialist Practitioners
005	OR005	DEMAND	Business/Student Demand Uncertain
006	OR006	FUNDING	Funding Not to be Renewed/No New Funding

Add Select Delete

Exit


6.13 Click on the appropriate reason for the FTC

6.14 Click on **Exit**

6.15 Move to the next required screen.

7 Post Holding History data entry screen

Seq	Start	End Date	Post	M	Status	N	Dtls	Summary
001	02/04/2007	31/03/2010	DD03003777	Y	PS001	N	Y	

 This screen will display the previous posts that this person has occupied in past employments at the University. **There is nothing to enter in this screen.**

- 7.1 To view Grade, Service Conditions, Working hrs and Pattern, Locations, etc, for the post, click in the **Dtls** field and **Window in**.
- 7.2 Click on **Exit** to return to the **Post Holding History** screen
- 7.3 Move to the next required screen.

8 Relationship Summary data entry screen

Seq	Code	Description	Emp No.	Dets	UF	Notes
001	NOK	Next Kin	...	Y	N	...

Buttons: Add, Change, Delete, Expand

Status: Pseudo-Sequence Number for Index Paging

There may already be an emergency contact entered in this screen from their previous employment with the University. You may need to click on **change** to update this information.

8.1 If there is no record click on **Add** to enter the details of the employee's next of kin.

Seq	Code	Description	Emp No.	Dets	UF	Notes
001	NOK	Next Kin

8.2 Click on the down arrow in the **Code** field and select **NOK**.

8.3 **ENTER** past the **Emp No.** field.

8.4 **Window in** to the **Dets** field and complete the known personal details for the employee's next of kin.

MD55L1 Person Detail

Title Details

Relation	Next Kin	Relation Detail
Surname		
Title		
First Forename		
Other Forenames		
Previous Surname		
Known As		

Personal Details

Gender	
Date Of Birth	
Country of Birth	
Nationality/Citizenship	
Nat. Ins. No.	

Additional Telephone Passport/Visa
Address Notes

Exit

- 8.5 Click on the **Address** and **Telephone** fields to enter this information.
- 8.6 Click on **Exit**.
- 8.7 If you wish to add more than one next of kin contact repeat the steps
- 8.8 Move to the next required screen.

9 Employee Work Permit data entry screen

Seq	Area	Proof of ID	Registered	WP Valid From	WP Valid To	Extended To
001	EEA					

Work Permit / Visa No.

Home office letter issued ☐

Indefinite leave to remain ☐ Date Obtained

Migrant Worker Points

Date proof of ID was given

Background Information:

It is imperative that these details are entered correctly so that information is picked up by the Work Permit/Visa report. Failure to do so could see the University employing an illegal worker and therefore incurring substantial fines. If there are any questions on the matter please discuss with your Senior HR Assistant.

The abbreviations that **must** be used in all instances to record this information are;

- An employee with a Work Permit (**WP**)
- An employee who has a work permit through their partner/spouse (Work Permit Dependant - **WPD**)
- An employee with a Visa (**V**) or Student Visa (**SV**) – this could be through a number of routes.
- An employee who had Indefinite Leave to Remain (**ILTR**)
- An employee who is classed as a Highly Skilled Migrant Worker (**HSMW**)
- An employee with either the Workers' Registration Scheme or Accession State Worker Registration Scheme (**WR**)
- International Graduates (**IG**)

For example, use of these abbreviations would be WP123454, SV243578 etc. If you have instances where there are permission types not covered please discuss with one of the Senior HR Assistants.

Please note that any one employed on a Work Permit must also have the right to work in the UK and therefore two rows must be entered – one with the WP number and dates and one with the LTR number and dates. In some instances there can be different end dates on these documents and therefore both must be entered to ensure that the employee is working legally. The table below sets out the number of rows required against each permission type.

Permission to Work in UK	Documentation Required	No of rows to be Used on Resourcelink	Restriction on Working in the post for which details obtained
Work Permit	WP PLUS LTR/Visa	2	None in post obtained for
Work Permit Dependent	LTR/Visa	1	On basis spouse Work Permit – therefore if this ends permission withdrawn
Visa	Visa Stamp	1/2 (plus WP if applicable)	
Student Visa	Student Visa Stamp	1	20 hours per week during term time – this should be included in contract
Worker Registration Scheme (from Accession states)	WR	1	None
Highly Skilled Migrant Worker	HMSW	1	None
International Graduates	IG	1	None
Indefinite Leave to Remain	ILTR	1 row for this but please note that if this is issued after someone has started with the University a new row MUST be added with this detail i.e. do not just add this to an existing row.	None

In instances where someone comes back to the University or works in a new post and the details on the previous post need to be maintained, please can you add a HP to the details relevant to their previous post – i.e. HP WP1231516171781 or HP LTR132526262524.

If someone is granted citizenship please add a CZ as a prefix.

The table below sets out how an entry should be made against each individual permission type:

Field	Work Permit	Work Permit Dependant	Student Visa/ Visa	Indefinite Leave to Remain	Highly Skilled Migrant Worker	Workers Registration Scheme	International Graduates
Proof of ID	Enter the date the proof of ID was given	Enter the date the proof of ID was given	Enter the date the proof of ID was given	Enter the date the proof of ID was given	Enter the date the proof of ID was given	Enter the date the proof of ID was given	Enter the date the proof of ID was given
WP Valid From	Enter the date this is valid from	Enter the date this is valid from	Enter the date this is valid from	Enter the date this is valid from	Enter the date this is valid from	Enter the date this is valid from	Enter the date this is valid from
WP Valid To	Enter the date this is valid to	Enter the date this is valid to	Enter the date this is valid to	Enter 01.01.2020	Enter the date this is valid to	Enter the date this is valid to	Enter the date this is valid to
Extended To	Only enter date when the Valid To date has been extended	Only enter date when the Valid To date has been extended	Only enter date when the Valid To date has been extended	Leave blank	Only enter date when the Valid To date has been extended	Only enter date when the Valid To date has been extended	Leave blank
Work Permit/Visa No.*	Enter Ref No. for WP	Enter Ref No. for WPD	Enter Ref No. for V or SV	Enter Ref No. For ILTR	Enter Ref No. for HSMW	Enter Ref No. for WR	Enter Ref No. for IG
Home Office Letter Issued	Enter Y or N	Enter Y or N	Enter Y or N	Enter Y or N	Enter Y or N	Enter Y or N	Enter Y or N
Indefinite Leave to Remain	Enter N	Enter N	Enter N	Enter Y	Enter N	Enter N	Enter N
Date Obtained	Leave Blank	Leave Blank	Leave Blank	Enter Date ILTR was granted	Leave Blank	Leave Blank	Leave Blank

Entering Both Work Permit & Visa Information:

Separate rows will need to be entered on ResourceLink for the **Work Permit** Information and **Visa** Information if the type of permission to work in the UK warrants such permissions. Please refer to the table above to ensure that the correct number of rows of information is completed.


Move to the next required screen.


10 Current Post Holding data entry screen

This screen contains information about the person's post(s) at the University.

10.1 Click on **Add** to enter the Current Post Holding data for the employee.

10.2 Type in the **Start Date**.


 If the employee is full time the start date will be the Commencement Date on the HR Form.

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

10.3 Press **ENTER**.

10.4 Type the Post Number into the **Post** field.

10.5 Press **ENTER**.

 If you see a dialog box warning that the FTE is being exceeded click on **Exit**.

10.6 Click in the **Details** field and **Window in**.

MD47L3 Employee Post Holding Details

Detail

Post DD03003777 HR Reporting & Information Manager
Job MSA4+ Management Specialist & Administrative 4
Employee Grade GRADE 4 Level 4
Post Grade GRADE 4 Level 4

General Conditions Misc Grade Contract

Start 01/05/2010 SG004 Rejoiner to University
End

Service In Post 27 Days
Projected End

Post Main Flag ☐ Suspended ☐
Exc. from attracting Ee's Costs ☐

T/S Template Perf Management User Fields Notes
Salary Planning Exit

- 10.7 Click on the drop down list in the highlighted field. A list of reasons will be displayed:

MD57G3 Dependency Selection

Seq	Code	Description	Score
001	GD001	Regrading of Post	
002	LG036	End of Visitor status	
003	LG037	Visitor to Staff	
004	PJL001	Cover for Maternity	
005	PJL002	Cover for Career Break/Secondment	
006	PJL003	Cover for Sabbatical/Study Leave	
007	PJL004	Promotion	
008	PJL005	Internal Transfer (in dept)-Restructure	
009	PJL006	Int. Transfer (in dept)-Breakdown in Rel	
010	PJL007	Internal Transfer (in dept) - Other	
011	PJL008	Int. Transfer (in dept)-Flex. Working	
012	PJL009	Internal transfer (out dept)-Restructure	

Add Select Delete

Exit

- 10.8 Select the appropriate reason for this Rejoiner - **SG004- Rejoiner to University**
- You will have to enter the Reason again in later fields – you must be consistent.
- 10.9 Type **Y** in the **Post Main Flag** field if this is the employee's main post.
- If this is the employee's only post you must enter **Y** in this field.
- 10.10 Press the **ENTER** key to move through the remaining fields and on to the **Conditions** tab.

MD47L3 Employee Post Holding Details

Detail

Post DD03003777 HR Reporting & Information Manager
Job MSA4+ Management Specialist & Administrative 4
Employee Grade GRADE 4 Level 4
Post Grade

General Conditions Misc Grade Contract

Service Cond ID MSA4+ Management Specialist & Administrative 4
Source JOB
Position Status
Occupancy
Wk Pattern 35MTWTF S0M7T7W7T7F7S0
Source POST

Contract Hours 0.00 Weekly Hours 35.00 Wks Per Year 52.1430
Source POST WK PAT FTE 1.0000 WPY FTE 1.0000

T/S Template Perf Management User Fields Notes
Salary Planning Exit

10.11 Window in to the **Service Cond ID** field

MD55G27 Employee Service Conditions

General

Post DD03003777 HR Reporting & Information Manager
From 01/05/2010 To

Seq	Start Date	End Date	Service Condition	Description	Notes
001	01/05/2010				

Add Change Delete Expand

Exit

10.12 Click on **Add** and press **ENTER** three times to pull through the Service Conditions.

- Please ensure that the correct service condition is showing as this impacts several other areas of the system, as well as reports, and can also impact whether or not the person will get paid. If you are unsure, please check with a colleague.

10.13 Click **Exit**.

10.14 Window in to the **Position Status Field**. The following screen will appear:

MD55G30 Employee Position Status

General

Post DD03003777 HR Reporting & Information Manager

From 01/05/2010 To

Seq	Start Date	End Date	Position Status	Description	Notes

Add Change Delete Expand

Exit

10.15 Click on **Add**.

10.16 Press **ENTER** twice to move to the **Position Status** field and display the drop down list.

MD55G30 Employee Position Status

General

Post DD03003777 HR Reporting & Information Manager

From 01/05/2010 To

Seq	Start Date	End Date	Position Status	Description	Notes
001	01/05/2010				

Add Change Delete Expand

Exit

Code	Desc	Long Description
PS001	FTP	Full Time - Permanent
PS002	PTP	Part Time - Permanent
PS003	TTOP	Term Time Only - Permanent
PS004	TTOFT	Term Time Only - Fixed Term
PS005	FTFT	Full Time - Fixed Term
PS006	PTFT	Part Time - Fixed Term
PS007	TBANK	Temp Bank
PS008	CASUAL	Casual Staff

10.17 Select the relevant **Position Status** from the list.

- Please ensure you select the correct position status as what you enter here impacts several other areas of the system, as well as reports, and can also impact the person's pay. If you are unsure, please check with a colleague.

10.18 Press **ENTER** to move through the remaining fields and click **Exit**.

10.19 **Window in** to the **Wk Pattern** field. The following screen will appear:

- 10.20 Click on **Add** and **ENTER** through the fields.
- 10.21 Select the appropriate work pattern from the **Work Pattern** drop down list if the field does not already contain the correct one.
- 10.22 The **Start Day** field refers to the Commencement Date on the employee's HR Form.

Start Day	Day Number
Sunday	1
Monday	2
Tuesday	3
Wednesday	4
Thursday	5
Friday	6
Saturday	7

- 10.23 Enter the appropriate number into the **Start Day** field (e.g. for a Monday you should enter "2")

☛ Please note that although the vast majority of work patterns are 7 day work patterns, there are a few which are longer (14 days, 21 days and even a few 56 day patterns) – in these cases you will need to work out not only which day of the week the person starts on (e.g. Monday) but also which Monday of their 2 week, 3 week, etc. pattern this is – i.e. are they starting on the first Monday of the pattern (day 2) or the second Monday of the pattern (day 9) etc.

- 10.24 **Window in** to the **Reason** field and select the reason for the appointment.

☛ The reason **MUST** be the same as was entered previously

10.25 Press **ENTER** and **Exit**.

10.26 **Window in** to the **Contract Hours** field.

Seq	Start Date	End Date	Contract Hours	Wks Per Year	FTE Hours	Hrs Per Year
001	01/05/2010					

10.27 Click on **Add** to bring through the **Start Date** and press **Enter** twice.

10.28 In the **Contract Hours** field, enter the weekly working hours.

10.29 Press **Enter**.

10.30 If the employee works less than the whole 52.143 weeks per year, enter the number of weeks per year that they will be working (e.g. "44")

❗ If the employee is working a Full year (52.143 weeks), then leave the **Wks Per Year** field blank.

10.31 Press **Enter**.

10.32 In the **FTE Hours** field enter the number of hours per week that a Full Time Equivalent would work in this post. For example, although someone in a MSA4+ post might only be working 17.5 hours per week the post itself may well have an FTE of 35 hours, in which case you would enter this in the FTE Hours field.

Seq	Start Date	End Date	Contract Hours	Wks Per Year	FTE Hours
001	02/04/2007		17.50		35.00

10.33 Click on **Exit**

10.34 Click on to the **Misc** tab.

MD47L3 Employee Post Holding Details

Detail

Post DD03003777 HR Reporting & Information Manager
Job MSA4+ Management Specialist & Administrative 4
Employee Grade
Post Grade GRADE 4 Level 4

General Conditions **Misc** Grade Contract

Location HIGHFIELD Highfield Campus, Southampton
Source POST

Average Pay
Average Pay
Auto Recalc AvP

Average Hours

T/S Template Perf Management User Fields Notes
Salary Planning

Exit

10.35 **Window in** to the **Location** field.

MD47L17 Employee Location

General

Post DD03003777 HR Reporting & Information Manager
From 01/05/2010 To

Seq	Start Date	End Date	Location	Description	Source	Reason	Notes
001	01/05/2010						

Add Change Delete Expand

Exit

10.36 Click on **Add** and press **ENTER** twice.

10.37 Select the location from the **Location** field drop down list.

10.38 Press **ENTER**.

10.39 **Window in** to the **Reason** field and select the reason for the appointment.

☛ The reason **MUST** be the same as was entered in step 10.8.

10.40 Press **ENTER**.

10.41 Click on the **Grade** tab.

MD47L3 Employee Post Holding Details

Detail

Post	DD03003777	HR Reporting & Information Manager
Job	MSA4+	Management Specialist & Administrative 4
Employee Grade		
Post Grade	GRADE 4	Level 4

General Conditions Misc Grade Contract

Pay Grade **GRADE 4** Level 4

Source EMPPOST

Start Date 01/05/2010

End Date

Point

Point Amount

Point Rate

T/S Template Perf Management User Fields Notes

Salary Planning

Exit

Window in to the Pay Grade field.

MD47G41 Employee Spinal Grade History

General

Post DD03003777 HR Reporting & Information Manager

From 01/05/2010 T.

Seq	Start Date	End Date	Grade	Change Reason	Source	Grade	Point	N
001	01/05/2010		GRADE 4		POSTPL	POSTGD		N
Point Rate		Enh.Rate		Point Amount				
Override Date				Override Reason				
Override Step				Carry Forward				
Bar Point				Current Bar Point		34		

Add Change Delete Expand

Exit

- 10.42 The **Grade** will pull through from the post, however if this is wrong it can be overwritten in this screen.
- 10.43 If this is incorrect or if the employee is on a **Off Scale Salary** or works above the standard hours for their grade (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)

- 10.44 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

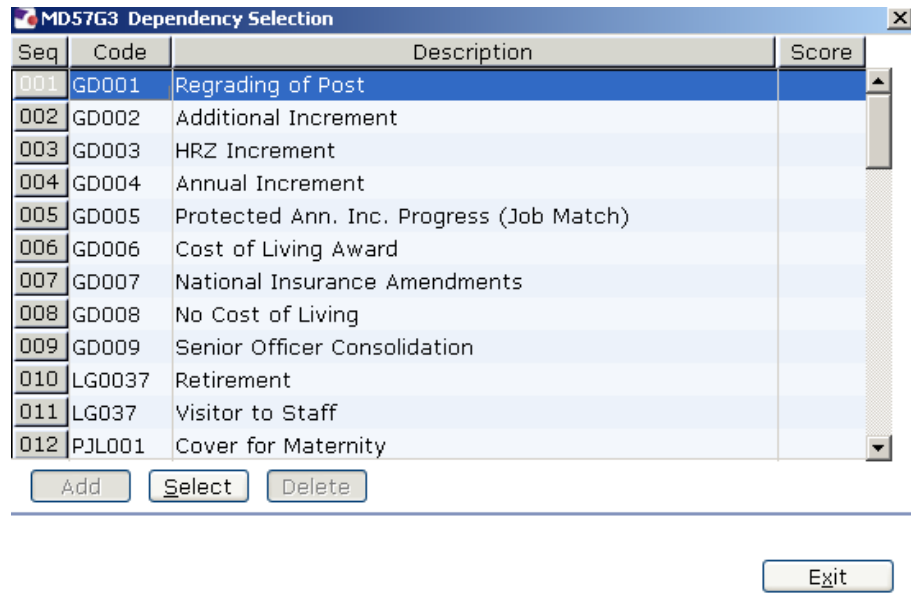
Seq	Grade	Description
00055	OS GRADE2A	Off Scale Level 2A
00056	OS GRADE2B	Off Scale Level 2B
00057	OS GRADE3	Off Scale Level 3
00058	OS GRADE4	Off Scale Level 4
00059	OS GRADE5	Off Scale Level 5
00060	OS GRADE6	Off Scale Level 6
00061	OS GRADE7	Off Scale Level 7

Hourly Rate Grades

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

- 10.45 Click on the appropriate Grade or Grade Equivalent for this employee.
- 10.46 Press **Enter**.
- 10.47 In the **Reason** field, click on the drop down and scroll down the list and select the reason for the appointment.

☛ The reason **MUST** be the same as was previously entered.




MD57G3 Dependency Selection

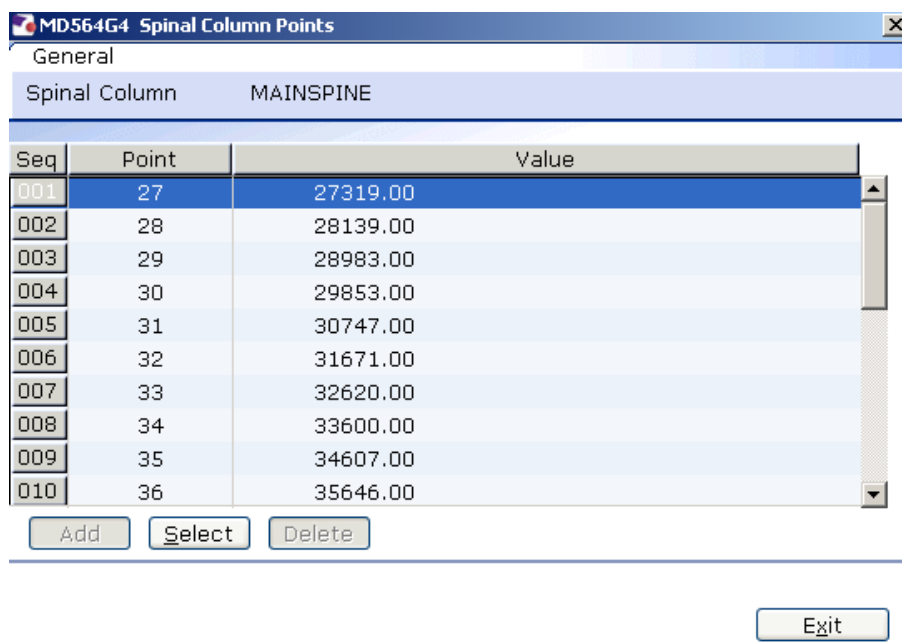
Seq	Code	Description	Score
001	GD001	Regrading of Post	
002	GD002	Additional Increment	
003	GD003	HRZ Increment	
004	GD004	Annual Increment	
005	GD005	Protected Ann. Inc. Progress (Job Match)	
006	GD006	Cost of Living Award	
007	GD007	National Insurance Amendments	
008	GD008	No Cost of Living	
009	GD009	Senior Officer Consolidation	
010	LG0037	Retirement	
011	LG037	Visitor to Staff	
012	PJL001	Cover for Maternity	

Add Select Delete

Exit

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

 You will not need to select a point if the employee is paid an **Off Scale Salary**, in which case leave this field blank



MD564G4 Spinal Column Points

General

Spinal Column MAINSPINE

Seq	Point	Value
001	27	27319.00
002	28	28139.00
003	29	28983.00
004	30	29853.00
005	31	30747.00
006	32	31671.00
007	33	32620.00
008	34	33600.00
009	35	34607.00
010	36	35646.00

Add Select Delete

Exit

- ☛ 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 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 below.

So, if you are entering a new starter to the University who is starting between 1st August and 1st February then you can safely leave the “Override date” field blank as they will have been in post for 6 months or more by 1st August and should receive a normal 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).

- Please note: If you need to add an increment grade row to a record and there is already a future dated grade row which is scheduled to begin after the date of the increment you will need to manually remove and re-enter this.

For example, if in June you were instructed to add an additional increment to someone's record from 1st August but notice that there is already a grade row starting on 1st September, you would need to:

- copy down the details of this future dated grade row, then delete the row
 - add in the increment row from 1st August, then
 - re-add the row starting 1st September.
- If you do ever need to delete and then re-add a grade row, do ensure that you copy the details exactly.

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.

Please note that non-standard incremental progression is only applicable in very limited instances. These are **Clinical Consultants, Professorial staff, Level 7 non-professorial staff, ERE staff appointed prior to 01/10/2004 protected on level 3**

- 10.49 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	34			N	
002	35			N	
003	36			N	
004	37			N	
005	38			N	
006	39			N	
007	40			N	

- 10.50 Click on the current bar point at the top of the table and click in the **Removed field**.
- 10.51 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
- 10.52 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.
- 10.53 Click on **Exit**.
- 10.54 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

- 10.55 Press **Enter** to move through the remaining fields and click **Exit**. Click on **User Fields**.

Field Label	Field Contents	Description
Probation End Date		
Prob Confirmation		
Prob Ext. Date 1		
Prob Ext. Date 2		
NHS Honorary C'tract		
Sch/Dept Contact		

Probation End Date

Exit

Type in the **Probation End Date**, press **ENTER**

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

10.56 Using the scroll buttons , scroll down to the bottom of the screen

10.57 Click on **HMS Reference Number**

Field Label	Field Contents	Description
Contact Extension No		
Authorised Signatory		
Job Details		
Location		
Visitor Title		
HMS Reference Number		

HMS Reference Number

Exit

10.58 In the **HMS Reference Number** field enter the HMS Ref. No for this post.

10.59 Press **ENTER** and click on **Exit**.

10.60 Click on the **Contract** tab.

MD47L3 Employee Post Holding Details

Detail

Post	DD03003777	HR Reporting & Information Manager
Job	MSA4+	Management Specialist & Administrative 4
Employee Grade	GRADE 4	
Post Grade	GRADE 4	Level 4

General Conditions Misc Grade Contract

Redeployment Reason

Projected End Date

Contract Number

HESA Indicator ☐


T/S Template Perf Management User Fields Notes

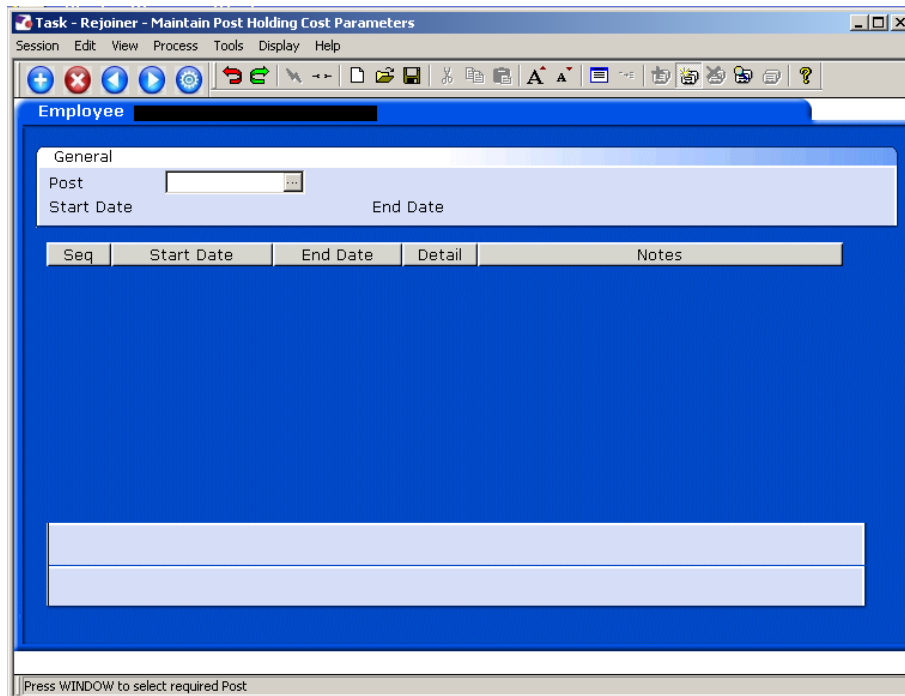
Salary Planning

The **Redeployment Reason** field is not used.

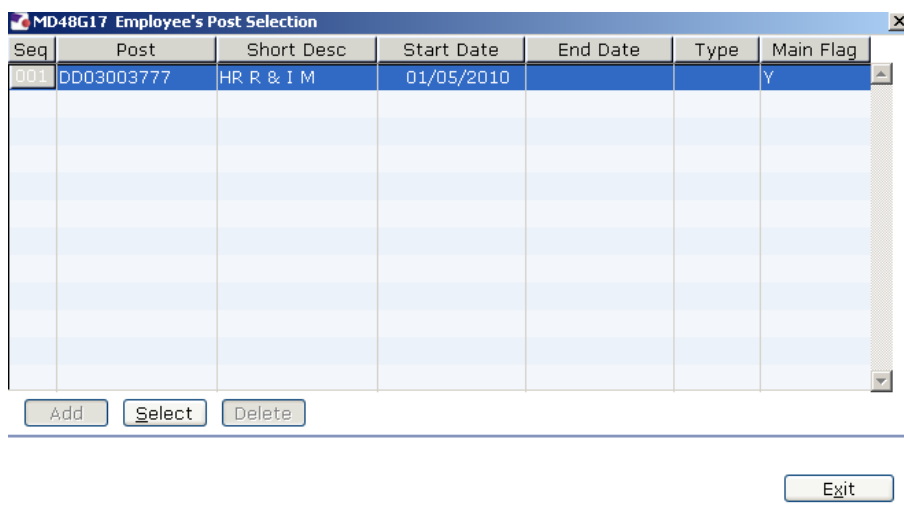
- 10.61 If the employee is on a Fixed Term Contract enter a **Projected End Date** then click in the **Contract Number** field and select the contract entered previously on the Contract Details Screen.
- 10.62 If the post is HESA returnable type **Y** into the **HESA Indicator** field.
- 10.63 Press **ENTER** and click on **Exit**.
- 10.64 Move to the next required screen.

11 Post Holding Costing data entry screen

-  You must always complete this screen and attach a Cost Centre to the Post Holding.



11.1 Window into the **Post** field.



Seq	Post	Short Desc	Start Date	End Date	Type	Main Flag
001	DD03003777	HR R & I M	01/05/2010			Y

11.2 Click on the new post.

Task - Rejoiner - Maintain Post Holding Cost Parameters

Session Edit View Process Tools Display Help

Employee

General

Post DD03003777

Start Date End Date

Seq	Start Date	End Date	Detail	Notes
-----	------------	----------	--------	-------

11.3 Press **Enter**.

Employee 1813862 : MR TJ WATERTON

General

Post DD03003777 HR Reporting & Information Manager

Start Date 01/05/2010 End Date

Seq	Start Date	End Date	Detail	Notes

Add Change Delete

11.4 Click on **Add**

11.5 In the **Start Date** field enter the start date of this post.

11.6 Press **Enter**.

11.7 Leave the **End Date** field blank, **Enter** through.

12 Holiday Entitlement

Seq	Start Date	End date	Entlmnt	B/F	Extra	Taken	Remain
001	01/10/2009	31/03/2010	14.5	0.00	5.0	19.50	0.00
002	01/10/2008	30/09/2009	30.0	0.00	2.0	27.00	5.00
003	01/10/2007	30/09/2008	30.0	0.00	1.0	29.00	2.00

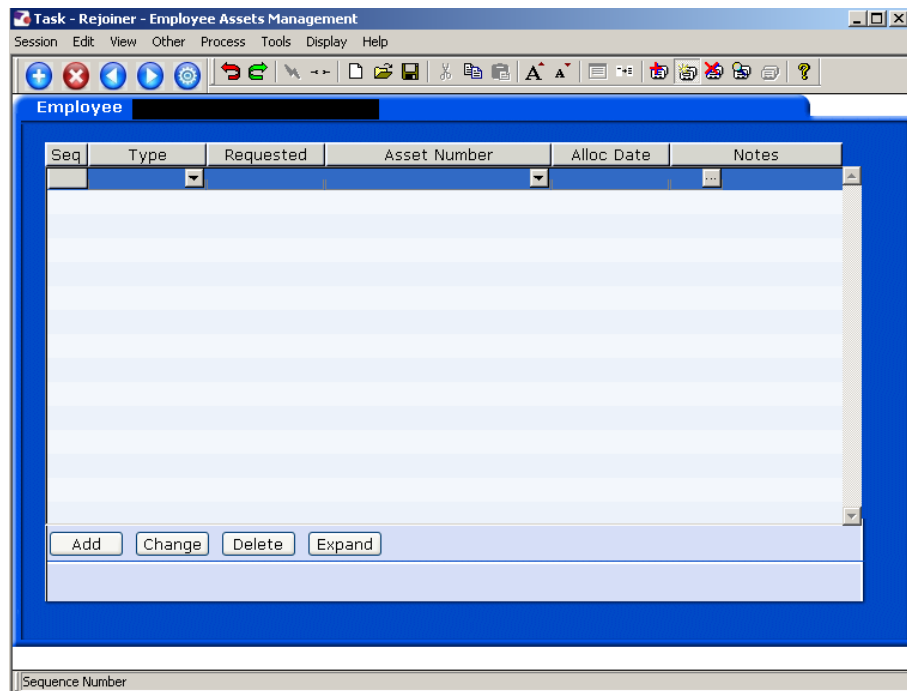
Buttons: Add, Change, Delete, Expand

Work Pattern

Pseudo-Sequence Number for Index: Paging

- 12.1 Click on **Add** if the employee is to receive a holiday entitlement.
- 12.2 Enter the employee's start date into the **Start Date** field and press **ENTER**. (this field will default to 1st October, overwrite this with the employee's actual start date).
 - ☛ Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.
- 12.3 In the **End Date** field, enter the end date of the current leave year (always 30th September) unless the employee is on a fixed term contract which is due to expire before this date – in which case enter the end date of the FTC. Then press **ENTER** through the remaining fields.
- 12.4 The "**Entlmnt**" field should automatically populate.
 - ❗ If there is no entitlement the employee is either rightly attached to a service condition (see Current Post Holding) where they have no entitlements or they are attached to the wrong service condition.
- 12.5 Move to the next required screen.

13 Asset Management



- 13.1 Click on **Add** if the employee is to be assigned particular assets e.g. a laptop
- 13.2 Select the asset type from the drop down list.
- 13.3 Press **ENTER** and amend the date requested if necessary.
 - ☛ Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.
- 13.4 **ENTER** through the rest of the fields on the row.
- 13.5 Move to the next required screen.

14 General MyView Parameters Data Entry Screen

Task - Rejoiner - General MyView Parameters

Session Edit View Process Tools Display Help

Employee [REDACTED]

Password Access

Password Not Allocated Last Changed 02/02/2010

Security Profiles

Internet Profile EMPDEFAULT Employee Access
Source Personal

Intranet Profile [REDACTED]
Source Default

Directory Photo

Display Photo ☐

Allocate Passw... Clear Password Suspend Pword Lock Password

Window to select intranet security profile to assign to employee


This screen is where you set up the MyView profile that the employee should be allocated.

i The **Password** field will read “Not Allocated” for a new starter.

- 14.1 In the **Profile** field, select the relevant MyView profile for this employee (do not leave this set to the default of EMPDEFAULT). Which MyView profile the person should be on will depend on whether they are a line manager or not and also on how their particular School / Department is using MyView.
- 14.2 You do not need to issue a MyView password as the person is not yet an employee and will also not yet have a University email address. When a new starter begins work they should be informed by their School / Department to contact ServiceLine in order to receive a MyView password.
- 14.3 Move to the next required screen.

15 Fixed Pay Elements Summary data entry screen

Use this screen to enter **Fixed Pay Elements** the employee is to receive every month e.g. Basic Pay, Market Supplements, etc.

-  As this person is a Rejoiner there will already be information for their previous employment with the University. The * in the **E** column highlights that there is an end date for that Pay Element.

15.1 Click on **Add**

15.2 **Window in** to the **Pay Element** field and **ENTER** through the fields to display the list of pay elements.

Seq	Code	Por D	Type	Short Desc	Long Description
0001	0001	D	N	Tax Paid	Tax Paid
0002	0002	D	N	Tax Rebate	Tax Rebate Withheld
0003	0010	D	NI	NI C/I	NI Contracted In
0004	0011	D	NI	NI A Saved	Non-Directors A Rate NI
0005	0020	D	NI	NI Wfe C/I	NI Wife Contracted In
0006	0021	D	NI	NI B Saved	Non-Directors B Rate NI
0007	0025	D	NI	NI CI Def.	NI Contracted in (Deferred)
0008	0026	D	NI	NI C Saved	Non-Directors C Rate NI
0009	0030	D	NI	NI Pen C/I	NI Pensioner Contracted In
0010	0031	D	NI	NI C Saved	Non-Directors C Rate NI
0011	0035	D	NI	NI CO Def.	NI Contracted out (COSR) Deferred

- 15.3 Select the required pay element (Code **1000** is **Basic Pay**, codes 0001 – 0999 are standard ResourceLink pay elements, 1000+ are UoS specific).


If the employee is to be paid a salary of a non spinal amount you will need to enter the Pay Element **2000-Basic Pay Non Spinal** and enter an **annual** amount which the system will then divide by 12

- 15.4 The following data entry screen is displayed:

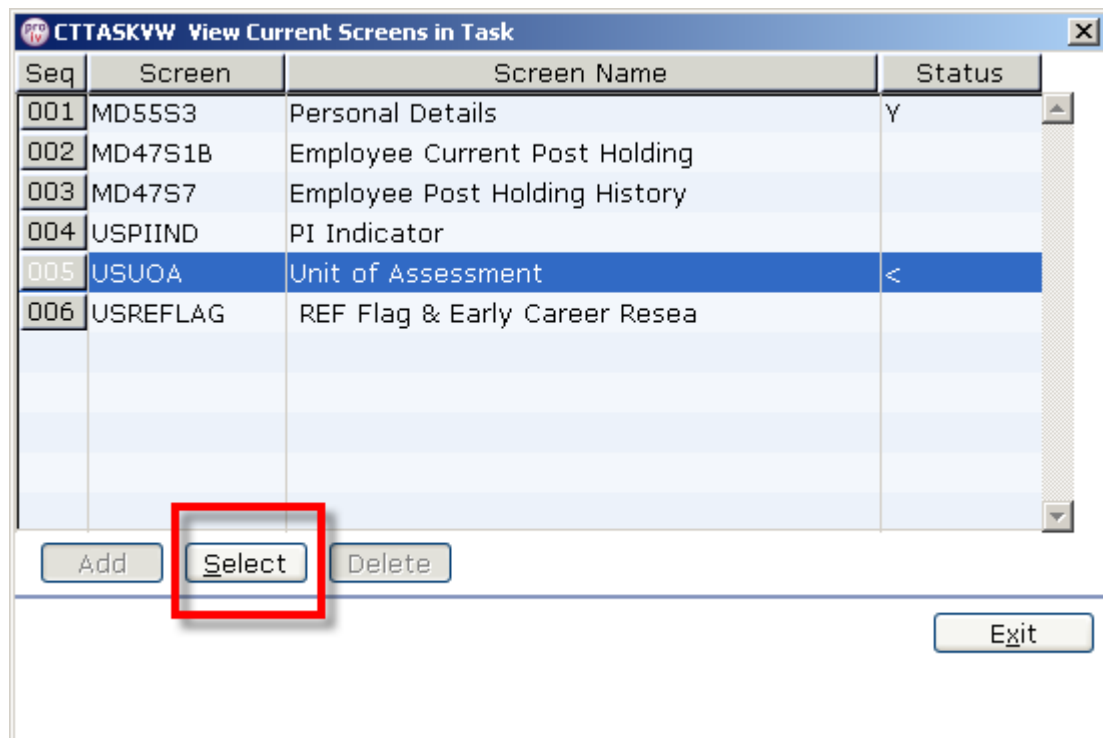
- 15.5 **Window in** to the **Post** field. A list of the employee's posts is displayed. Select the required post this Pay Element is to be attached to.
- 15.6 Press **ENTER** to move through the **Start date**.
- 15.7 **Window in** to the **Reason** field and select the reason for the Pay Element.
- The reason **MUST** be the same as was entered in Current Post holding.

- 15.8 Press **ENTER** through the **End Date**.
- 15.9 If the Pay Element you are entering requires a specific amount to be attached to it (e.g. PE 2000), enter this in the **Amount** field. For Pay Element 1000 – Basic Pay this is not required.
- 15.10 Press **ENTER** to move through the remaining fields
- 15.11 The **Fixed Pay Element Screen** will be updated.
- 15.12 Click on **Add** and repeat this process for each Fixed Pay Element the employee is to continuously receive each month.
- 15.13 Save the changes.

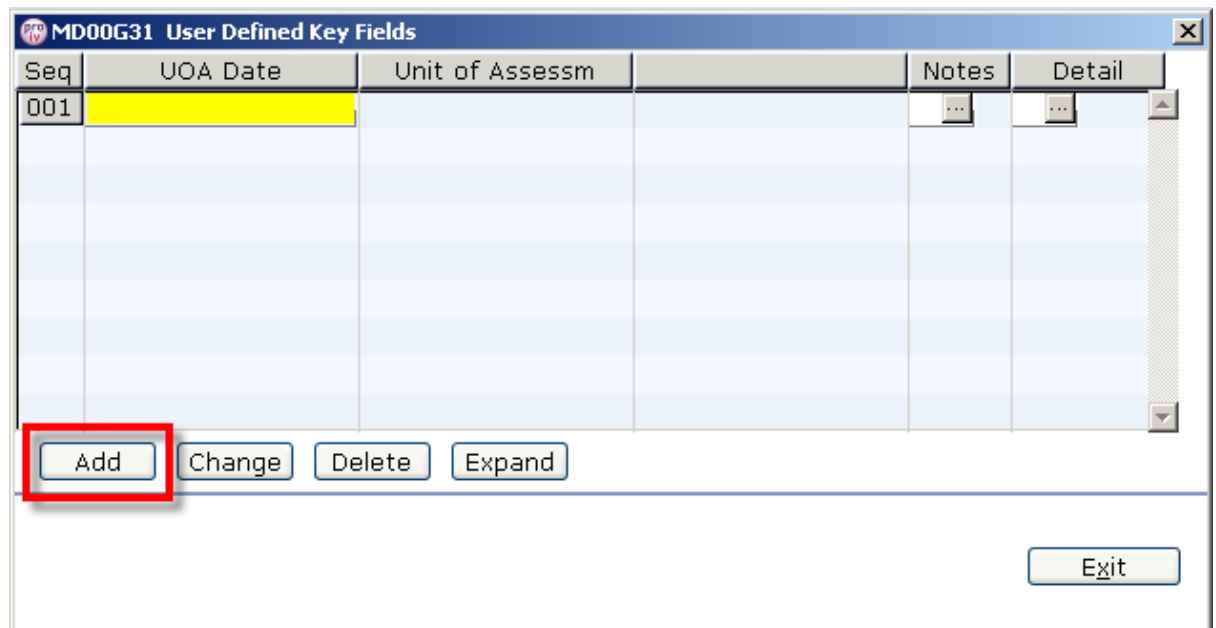
16 Unit of Assessement

16.1 Select  to display the screens available within this Task.

16.2 Click on Unit of Assessment and SELECT



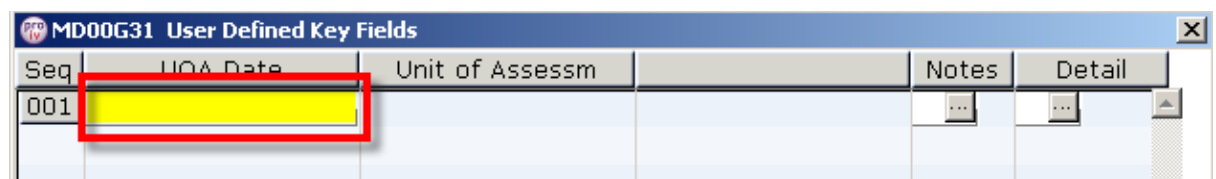
16.3 Click on **Add** to enter the UoA Date.



Seq	UOA Date	Unit of Assessm	Notes	Detail
001		

Buttons: Add, Change, Delete, Expand, Exit

16.4 Double click in the UOA Date field



Seq	UOA Date	Unit of Assessm	Notes	Detail
001		

16.5 The following screen will be displayed. Press **ENTER**.

MD37G4A Narrative Table Search

Search

Narr Code

Seq	Code	Desc	Long Description
-----	------	------	------------------

Exit

16.6 Click on the appropriate description and click **SELECT**

MD37G4A Narrative Table Search

Search

Narr Code

Seq	Code	Desc	Long Description
001	BNCH10	BNCH2010	Benchmark 2010
002	BNCH11	BNCH2011	Benchmark 2011
003	BNCH12	BNCH12	Benchmark 2012
004	BNCH13	BNCH13	Benchmark 2013
005	BNCH14	BNCH14	Benchmark 2014
006	RAE08	RAE2008	RAE 2008

Add Select Delete

Exit

☛ All Units of Assessments should be entered against UoA Date: Benchmark 2010 until advised otherwise by the HR Systems Team.

- 16.7 Within the Unit of Assessment field click on the drop down icon to display the data available for selection

MD00G31 User Defined Key Fields

Seq	UOA Date	Unit of Assessm	Notes	Detail
001	BNCH10	

Add Change Delete Expand

Exit

- 16.8 Press ENTER

MD37G4A Narrative Table Search

Search

Narr Code

Seq	Code	Desc	Long Description
-----	------	------	------------------

Exit

16.9 Click on the appropriate description and click **SELECT**

MD37G4A Narrative Table Search

Search
Narr Code

Seq	Code	Desc	Long Description
001	02	Cancer Std	Cancer Studies
002	04	Hosp Based	Other Hospital Based Clinical Subjects
003	08	Prim Care	Primary Care and Other Community Based
004	11	Nursing	Nursing and Midwifery
005	12	AHP	Allied Health Professions and Studies
006	14	Bio Scienc	Biological Sciences
007	17	Earth Sys	Earth Systems & Environmental Sciences
008	18	Chemistry	Chemistry
009	19	Physics	Physics

Add Select Delete

Exit

16.10 If known enter Unit of Assessment End Date by windowing in on the **DETAILS** field.

MD00G31 User Defined Key Fields

Seq	UOA Date	Unit of Assessm	Notes	Detail
001	BNCH10	18	N

Add Change Delete Expand

Exit

● End Date details can be added at a later date

16.11 Type the End Date into the highlighted field and press **ENTER**

The screenshot shows a software interface with a blue background. At the top, there is a table with three columns: 'Field Label', 'Field Contents', and 'Description'. Below the table is a large yellow rectangular area. At the bottom of the interface, there is a text input field labeled 'End Date' containing the text '301110'. This field is highlighted with a red rectangular border. To the right of the input field is a yellow dropdown menu. Further right is a button labeled 'Exit'.

This screenshot shows the same software interface as the previous one. The 'End Date' field now contains the date '30/11/2010'. This field and its corresponding entry in the table above are highlighted with a red rectangular border. The dropdown menu and the 'Exit' button remain visible.

16.12 Click **Exit**.

16.13 Historical data will be maintained on this screen.

Seq	UoA Date	Unit of Assessm	Notes	Detail
001	BNCH10	21	N	
002	RAE08	21	N	

☛ Ensure that an End Date is inputted before a new Start Date is entered.

17 Standard letters

17.1 Click in the **Let Opts** field of the standard letter you want to produce

Seq	Letter	Ver	Description	Let Opts	Copies
001	4+ACAD	001	Level 4+ academic contract	NOACT	1
002	4+NON-AC	001	Level 4+ non-academic		
003	ACAP	001	ACAP		
004	CLINAC	001	Clinical Academic/Clinical Re		
005	CLINPROF	001	Clinical Consultant		
006	DEMO	001	Demonstrator		
007	EAP	001	EAP		
008	ITINNOV	001	IT Innovation	NOACT	1
009	KTP	001	Knowledge Transfer Partners	NOACT	1
010	LEV 1-3	001	Levels 1 - 3	NOACT	1
011	MCURIE	001	Marie Curie Contract	NOACT	1

Buttons: Add, Change, Delete, Expand, Exit

17.2 Click on the drop down and select **MERGE – Immediate print with manual changes**.

17.3 Click on **Exit**. A series of pop-up windows will appear, where you will need to select on the relevant information that should be pulled through to the contract.

Seq	Post	Start Date	End Date	Occ Type	Main
001	EMPLOYEE	01/04/2010			
002	DD00-VISIT	01/04/2010	30/04/2010		Y
003	DD01003418	01/06/2010			Y
004	DD03006231	01/05/2010	31/05/2010		Y
005					
006					
007					
008					
009					

Buttons: Add, Select, Delete, Exit

17.4 If the person has more than one post, ensure that you select the correct post relevant to this contract.

Seq	Hierarchy	Eff Date
007	HRMAIN02	14/01/2008
008	HRMAIN03	01/04/2008
009	HRMAIN04	01/08/2008
010	HRMAIN05	01/09/2008
011	HR MAIN	01/11/2008
012	HRMAIN06	01/11/2008
013	HRMAIN07	01/05/2009
014	HRMAIN08	01/01/1940

- 17.5 If you are asked to select a version of the HR Main hierarchy always, select the most recent version.
- 17.6 If any of the pop-up windows only have one row of data, simply click on **Select**.
- 17.7 If any of the pop-up windows do not show any rows of data, simply click on **Exit**.
- 17.8 Complete the following details for the mail merge

Seq	Pop Up Prompt
001	Please enter the fte & as shown on RL
002	Enter whether full or part time
003	please enter amount/no of points
004	Enter name contact Pers Asst /Recr Asst
005	Employee to report to (building no):
006	Employee to report to (room no):

- 17.9 Once you have progressed through all of the pop-up windows, the employee's letter should generate in **Word** at which point you will be able to check and amend it (if necessary).

- Please ensure you delete the highlighted sections in the contract where appropriate to the individual employee.
- Please only click on the Print button if you have an appropriate HR printer set as your default printer:

Attempting to print a standard letter (contract) on any other printer will not only result in failure, but will also cause problems for other users.