## This work instruction was last updated: 19<sup>th</sup> May 2010

## Temp Bank Additional Post/Change of Post Process

This Work Instruction describes the Additional/Change Post Process. This includes:

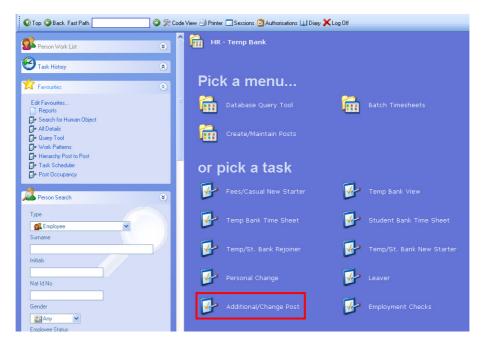
- Moving a temp from a temp post in one school to work in a temp post at another school
- Assigning a temp to an additional post in another school (i.e. the temp is working in more than one school)

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 Adding an Additional Post or Changing a Post
- 2 Current Post Holding data entry screen
- 3 Post Holding History information screen
- 4 Post Holding Costing data entry screen

### 1 Adding an Additional Post or Changing a Post

1.1 ResourceLink HR Temp Bank Home Page > Additional/Change Post



1.2 The following search form is made available

🚰 Task - HRZ/Additional Incremer	hts - Employee Selection Screer	n	
🔁 😅 📉 🗋 😂 🖬 😓	X 🗈 💼 🗚 🖌 🔲 🖘   1	19 🗃 29 19 19 19	
Employee Other N Match C Employee Number	umbers Structure Exact C Partial	Saved List Employment	· · · · ·
Surname Sex Current Employee Y Previous Surname Known As		Initials Nat. Ins. No. As at Date 24/03/20 Add	010 Search
Sumame	Inits Title Emp Numi	ber National ID Number	Start Date For
Select Exit	Save List	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

### 2 Current Post Holding data entry screen

- () If the temporary worker is leaving one temporary assignment and moving to another follow the process outlined below.
- If the temporary worker is remaining in their current temporary assignment and also being assigned to an additional temporary assignment skip to step 2.9

								Post De	tails							<u>_   ×</u>
			Process													
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E	nploy	yee 2	08650	6 : MS	LLA	STIC										
	Seq	St	tart	1	Pos	t	M	Gra	de	Status	N	Detail		Summ	any	
l r	001		06/201	ח ססח				GRADE		Otatas	N	Y		Gainin	ary	<u> </u>
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	Ado	1	Change	• •	elete	Exp	anc	1								
	🤳 Р	ost Lir	nking													
		<b>GURNU</b>	的出现系统	制刷制	URUAU	RUHURI	1910		他病的治疗		明治清朝					

2.1 **Window in** to the **Detail** Field of the assignment / post that the temporary worker is leaving

MD47L3 Employee Po	ost Holding Details					×
Detail						
Post	DD00-TBNK	Temp Bank-⊢	luman Resource	∋s		
Job	TEMP/CAS	Temp/Casual				
Employee Grade Post Grade	GRADE 2A	Level 2a				
1 OST GIGGE	GRODE 2A	2000120				
<u>G</u> eneral	<u>C</u> onditions	Misc	Grade		Co <u>n</u> tract	
Start 01/06/ End Service In Post Projected End	'2010 <mark>SG001</mark>	▼ New Appoi	ntment			
Post Main Flag	M	Suspended				
Exc. from attract	ing Ee's Costs					
🥼 T/S Template 🧔 Salary Planning		agement <i> Us</i> i	er Fields	🥖 Note	s	E <u>x</u> it



- 2.2 Type the last date that the temp worked in their temporary assignment in the **End** field and press **ENTER**.
- 2.3 Click on the drop down arrow and select the reason from the list.

MD 💽	)57G3 Dep	endency Selection		×
Seq	Code	Description	Score	
001	GD001	Regrading of Post		
002	LGO01	End of Fixed Term Contract		
003	LGOO2	End of FTC - End of Specialist Expertise		
004	LGOO3	End of FTC – Substantive Post Holder Ret		
005	LG0037	Retirement		
006	LG004	End of FTC - No Longer a Business Demand		
007	LGOOS	End of FTC - No Further Funding		
008	LG006	End of FTC - Completion of Project		
009	LG007	End of FTC - End of Training period		
010	LGOO8	No Confirmation of Probation		
011	LG009	Death in Service		
012	LG010	Dismissal - Conduct		-
<i>,</i>	Add	Select Delete		
		C	E <u>x</u> it	

- 2.4 Leave the **Post Main Flag** marker as **Y** if the temporary worker will be moving to their new temporary assignment. directly after this one ends or if there is a gap between assignments (the system requires that an employee has one (and only one) main post unless they are a leaver).
- 2.5 **ENTER** through the remaining fields and click **Exit**.
- 2.6 The following screen will be displayed.

🏹 Task - Additional/Change Post - Termination Options		<u>- 🗆 ×</u>
Session Edit View Process Tools Display Help		
🔁 🛇 🕢 💽 🎯 🗖 🖻 🔌 🕶 🗅 📽 🖬	] & B C A A E = b 🗑 ð 6 0 ?	
Termination Options		
General		
General		
Fixed P/E Automatically Closed	<u>Y</u>	
View Fixed PE Before Update		
View Fixed PE After Update Temp P/E Automatically Closed	N	
View Temp PE Before Update	N	
View Temp PE After Update		
Turining Automotion!!!! Oland		
Training Automatically Closed View Training Before Update	Y N	
View Training After Update	N	
	_	
Terminate Clocking Details	Y	
Set Operator Obsolete	Y	
		_



- 2.7 Click on **Continue** (you do not need to amend any of the fields on this screen).
- 2.8 You will then be returned to the **Current Post Holding** screen.

ion Edi	<mark>dditional/Change</mark> t View Process	Tools Display	Help						
				🗃 🖬   🐰 🖻		<b>\</b>   E	] ***   <b>t</b>	) 🗃 🎽 📾 💿 👔	
Emplo	yee 2086506	: MS L LAST	IC						
Seq	Start	Post	М	Grade	Status	N	Detail	Summary	
001	01/06/2010	DD00-TBNK	Y (	GRADE 2A		N	Y		
Ad	d Change	Delete	Expand						
<b>1</b>	Post Linking								

2.9 To attach the temp / student worker to another post, click on **Add**.

-	View Process					•	1 - 4 - 1 - Mar	🍇 🖄 🕒 👝 L 🙉 🛛	
	O O			🗁 🖬   J. 🖽		<b>7</b>   E		ia ia 🔓 🗃 🦻	ļ
mploy	yee 2086506	: MS L LASTIC	:						
Seq	Start	Post	М	Grade	Status	N	Detail	Summary	
001	01/06/2010	DDOO-TBNK	γ	GRADE 2A		N	Y		<u> </u>
002	]							••••	
									-
Add	d Change	Delete	xpand						

2.10 Type in the start date of the temporary assignment and press **ENTER**.

- 2.11 In the **Post** field, type in the correct TempBank or Student Bank post ID from the paper list of post IDs in the TempBank office, according to which school or department is hiring the worker.
  - (i) All of the Temp Bank posts are in the format "XXnn-TBNK" and Student Bank posts are in the format "XXnn-STBNK" (the first two letters refer to the school / department – so "DD01-TBNK" is the Human Resources Temp Bank post, for example).
- 2.12 Press **ENTER**.
- 2.13 If the following dialogue box appears, enter a **N** in the box and then press **ENTER** (you do not want the system to copy all of the details from another post as these will not be correct).



2.14 Window in to the **Detail** field.

MD47L3 Employee P	ost Holding Details					×
Detail Post Job	WT00-TBNK TEMP/CAS	Temp Bank-S3 Temp/Casual	RI			
Employee Grade Post Grade	GRADE 2A	Level 2a				
<u>G</u> eneral	<u>C</u> onditions	Misc	G <u>r</u> ade	Coj	<u>n</u> tract	
Start 01/07/ End Service In Post Projected End	2010 <u>SG001</u>	New Appoint	tment			
Post Main Flag		Suspended				
Exc. from attract	ing Ee's Costs	Γ				
🧔 T/S Template 🧔 Salary Planning		agement <i> User</i>	Fields	<i> N</i> otes		E <u>x</u> it

- 2.15 If necessary, change the reason for the appointment by clicking on the drop down arrow in the field to the right of the **Start Date**.
  - You will have to enter the **Reason** again in a later field you must be consistent.
- 2.16 If this is the temporary worker's main post or only assignment at the University type **Y** into the **Post Main Flag** field; if the temporary worker is already attached to another active post, type **N**.

- Please note that a temporary worker must only have one of their posts flagged as their main post.
- 2.17 **ENTER** through the remaining fields.
- 2.18 The **Conditions** screen will be displayed:

ND47L3 Employee Po	ost Holding Details						x
Detail							
Post Job Employee Grade Post Grade	WT00-TBNK TEMP/CAS GRADE 2A	Temp Bank-S3RI Temp/Casual Level 2a					
<u>G</u> eneral	<u>C</u> onditions	Misc	G <u>r</u> ade	Con	tract		
Service Cond ID Source Position Status Occupancy Wk Pattern Source	TEMP/CAS JOB	]	Casuals ork Pattern				
Contract Hours Source	0.00 <mark></mark> JOB	Weekly Hour FTE	5 3	36.00 Wks 1.0000 WP	s Per Year Y FTE	52.1430 1.0000	
🧔 T/S Template 🧔 Salary Planning	🧔 Perf Manag	gement <i> User</i> F	ields	🥖 Notes		Exit	]

2.19 Window in to the Service Cond ID field.

	55G27 Employee Serv neral	vice Conditions			X
Post From	WT00-TBNK	Temp Bank-S To	3RI		
Seq	Start Date	End Date	Service Condition	Description	Notes 🖆
		1	<u></u>		
					<b>V</b>
A	dd Change	Delete Exp.	and		
					E <u>x</u> it

- 2.20 Click on Add. The Start Date field will be automatically populated.
- 2.21 Press ENTER twice and window in to the Service Condition field.



- 2.22 Select **TEMP/CAS** from the list if this has not already defaulted into the field.
- 2.23 **ENTER** through the remaining fields and click **OK** to close the warning dialogue box that appears.
- 2.24 Click on **Exit**.
- 2.25 **ENTER** through to the **Position Status** field.
- 2.26 Window in to the Position Status field.
- 2.27 Click on Add the Start Date field will be automatically populated.

MD550	530 Employee Posi	tion Status
Genera	al	
Post	WT00-TBNK	Temp Bank-S3RI
From	01/07/2010	То
Seq	Start Date	End Date Position Status Description Notes 🖃
001	01/07/2010	<b>T</b>
Add	Change (	Delete Expand
		Exit

- 2.28 **ENTER** through to the **Position Status** field.
- 2.29 From the drop down list select **PS007 (TBANK)** for a temp bank worker or **PS018 (STDBANK)** for a student bank worker.
- 2.30 **ENTER** through the remaining fields and click on **Exit**.
- 2.31 **Window in** to the **Wk Pattern** field. The following screen will appear:

# Southampton

MD47L2 Employee Wor General					
Post WT00-TBNK From 01/07/2010	Temp Bank-S3RI To				
eq Start Date	End Date Work Pattern	Description		Start Day Reaso	in
			<u></u>		
Add Change	Delete Expand				
				E	

- 2.32 Click on **Add** and enter through the fields until you get to **Start Day**. (Ensure that the work pattern pulls through as **Default**)
- 2.33 Enter the digit "1" into the **Start Day** field.
- 2.34 **Window in** to the **Reason** field and select the reason for the appointment.
  - The reason MUST be the same as was entered previously
- 2.35 **Window in** to Contract Hours and enter through so that contract hours shows as **0.00**

MD47G12 Employee Cont	tract Hours			×
General				
Post WT00-TBNK	Temp Bank-S3RI			
From 01/07/2010	То			
Seq Start Date	End Date Contract Hours	Wks Per Year	FTE Hours	Hrs Per Year 📥
001 01/07/2010				
				-
Add Change	Delete			_
				E <u>x</u> it

- 2.36 Press ENTER and Exit.
- 2.37 **ENTER** through and the **Misc** screen will be displayed:

# Southampton

MD47L3 Employee Po	ost Holding Details						×
Detail							
Post	WT00-TBNK	Temp Bank-S3R	Ι				
Job	TEMP/CAS	Temp/Casual					
Employee Grade							
Post Grade	GRADE 2A	Level 2a					
						_	
<u>G</u> eneral "	<u>C</u> onditions	<u>M</u> isc ľ	G <u>r</u> ade	Ï	Co <u>n</u> tract		
Location				18. I I XX			
Location	HIGHFIEL	.D 🔤 Highfiel	d Campus, :	Southam	ipton		
Source	POST						
Average Pay							
Average Pay		Average	- Hours				
Auto Recalc Ave		Average		1			
AULU RECAIC AVE	· L						
🥖 T/S Template	Derf Man:	agement <i> U</i> ser I	Fielde	🥼 No	tor		
🧾 175 Template		syement 🥦 Oser	rielus	🥌 NO	.05		Exit
🥏 Salary Planning							EVIC

#### 2.38 Window in to the Location field.

- 2.39 Click on Add and press Enter twice.
- 2.40 A default location for this post will appear if you need to change this then simply select the relevant location from the **Location** field drop down list.
- 2.41 Press Enter.
- 2.42 **Window in** to the **Reason** field and select the reason for the appointment.
  - The reason MUST be the same as was entered previously
- 2.43 Press Enter.
- 2.44 Click Exit.
- 2.45 Click on the **Grade** tab.

MD47L3 Employee	Post Holding Details				X
Detail Post Job Employee Grade	WTOO-TBNK TEMP/CAS	Temp Bank-S3RI Temp/Casual			
Post Grade	GRADE 2A	Level 2a			
General	<u>C</u> onditions	Misc	G <u>r</u> ade	Co <u>n</u> tract	
· · · · · · · · · · · · · · · · · · ·	SPADE 2A	Level 2a			
🧔 T/S Template 🧔 Salary Plannin		agement <i> User</i> Fi	elds 4	🔰 Notes	E <u>x</u> it

- The Pay Grade field will default to GRADE 1A for student bank posts or GRADE 2A for temp bank posts (however these grades can be amended if necessary – see below)
- 2.46 Window in to the **Pay Grade** field.

MD470	641 Employee Spina	al Grade History				X
Genera	al					
Post	WT00-TBNK	Temp Bank-S3RI				
From	01/07/2010	Т.				
	and the second se		Chan	ae .	Grade	
Seq	Start Date	End Date Grade		Source	Source	Point N 🖻
001	01/07/2010 <sub>1</sub>	IGRADE 2A 🛛 💻	-	POSTPL	POSTGD	•• N ••
Poin	t Rate	Enh.Rate		Poir	nt Amount	
Over	rride Date		Over	ride Reasi	on	<u></u>
Over	rride Step		Carry	Forward		
Barl	Point	<u> </u>	Curre	nt Bar Po	oint	12
						~
Add	Change	Delete Expand				
						E <u>x</u> it

- 2.47 Click on **Change**.
- 2.48 **ENTER** through to the **End Date** field (leave this blank).
- 2.49 If the default grade is correct for this temp / student bank worker then you can **ENTER** through the **Grade** field
- 2.50 If the default grade is not correct for this temp / student bank worker then **window in** to change the grade.

2.51 Press **ENTER** twice to display the list of available grades.

	G3 Grade Selectio	n		×
Select	tion			
Grade	te Date			Search
Obsole			1980 P	Jearch
Seq	Grade		Description	
00017	GRADE 1B	Level 1b		<b>▲</b>
00018	GRADE 2A	Level 2a		
00019	GRADE 2B	Level 2b		
00020	GRADE 3	Level 3		
00021	GRADE 4	Level 4		
00022	GRADE 5	Level 5		
00023	GRADE 6	Level 6		
00024	GRADE 7	Level 7		
00025	GRD1A 35.5	Grade 1A 35.5		<b>•</b>
Add	<u>S</u> elect	Delete		
				E <u>x</u> it

- 2.52 Select the appropriate grade.
- 2.53 Press ENTER to move to the Reason field.
- 2.54 Use the drop-down menu in the **Reason** field and select the reason for the appointment.

The reason MUST be the same as was entered previously

- 2.55 Click on **Exit**.
- 2.56 **Window in** to the **Point** field and select the salary point for this employee.

MD 🛐	47G41 Employee Spina	al Grade History					×
Ger	neral						
Pos	t WTOO-TBNK	Temp Bank-S3RI					
Fror	n 01/07/2010	т.					
			Char		Grade		-
-			Chan	-			
Seq	Start Date	End Date Grade	Reason	Source	Source	Point N	
001	01/07/2010	GRADE 2A 🔄 🔤	SG001 🔽	POSTPL	POSTGD	11N	
P	oint Rate	Enh.Rate		Poir	nt Amount		
	)verride Date		Over	ride Reaso	on		
	verride Step		Carry	Forward			
	ar Point		,	nt Bar Po		12	
							<b>V</b>
4	\dd Change	Delete Expand					
						E <u>x</u> it	

2.57 **ENTER** through the remaining fields.

2.58 Click on **Exit**.

#### 2.59 Click on the **Contract** tab.

MD47L3 Employee	Post Holding Details				×
Detail Post Job Employee Grade	WT00-TBNK TEMP/CAS	Temp Bank-S3RI Temp/Casual			
Post Grade	GRADE 2A	Level 2a			
General	<u>C</u> onditions	Misc	G <u>r</u> ade	Co <u>n</u> tract	:
Redeployment R Projected End D Contract Numbe HESA Indicator	ate 📃	<b>y</b>			
🧔 T/S Template 🧔 Salary Plannin		agement <i> User</i> Fi	elds	🥖 Notes	Exit

- () You can ignore the **Redeployment Reason** and **Contract Number** fields as these are not relevant to Temp Bank.
- 2.60 If you have an end date for this particular temp / student bank assignment then you can enter this in the **Projected End Date** field.
- 2.61 Type **A** into the **HESA Indicator** field (this stands for Atypical and is used in the University's annual HESA return).
- 2.62 Next, click on the **User Fields** button at the bottom of the window.

1D00G:	32 Simple User Defined Field Data			
	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		<b>_</b>	
			E <u>x</u> it	NUSYUS

- () Not all of the lines are relevant to temp / student bank.
- 2.63 Click on the **Sch/Dept Contact** line and then enter a contact name (if known) for this temp / student bank assignment in the text field.

- 2.64 Use the scroll arrow on the left-hand side of the window to move down to the next information lines.
- 2.65 Click on the **Contact Extension No** line and then enter a phone number (if known) for this temp / student bank assignment in the text field.
- 2.66 Click on the **Authorised Signatory** line and then enter the name of the authorised signatory for this temp / student bank assignment in the text field.
- 2.67 You can use the **Job Details** line to record additional information about what kind of work the temp will be carrying out for the school / department they will be working for (e.g. clerical work, data entry, manual work, etc.)
- 2.68 Click on Exit to close the **User Fields** screen.
- 2.69 Click on Exit again to return to the **Current Post Holding** screen.
- 2.70 Move to the next screen.

### **3** Post Holding History information screen

1 This screen is for information only. You can see what previous posts the temp / student worker has held at the University.

Session Edit	View Process	Tools Display H					
<b>3</b>		5 🖻 🕅 -	- 🗅 🚅 🖬	3 <b>B B A</b>	a"   🖃 👐   🕇	) 🗑 🎽 🖨 🗇 🦹	
Employ	yee 2086506	: MS L LASTI	3				
Seq	Start 01/07/2010	End Date	Post WT00-TBNK	M Status PS007	N Dtls	Summary	
002	01/07/2010		WTOD-TENK DDOO-TENK	Y PS007			
Add	d Change	Delete E	xpand				

1 To get an overview of any of the posts listed, click on the relevant line and then **window in** to the **Summary** field.

General	
Post WT00-TBNK Temp Bank-S3RI	
Job TEMP/CAS Temp/Casual	
Employee Grade	
Post Grade GRADE 2A Level 2a	
Service Cond ID TEMP/CAS Temps / Casuals	
Emp Post Hold. Reason Description	
Start 01/07/2010 SG001 New Appointment	
End	
Service In Post Projected End	
Post Main Flag Suspended	
Contract Number	
Position Status PS007 Temp Bank	
Occupancy	
Location HIGHFIELD Highfield Campus, Southampton	
Wk Pattern DEFAULT Default Work Pattern	
Contract Hours Weekly Hours	
Source CONTRACT FTE	
Pay Grade GRADE 2A Level 2a	
User Fields 🧖 Notes	
	E <u>x</u> it

3.1 Move to the next data entry screen.

## 4 Post Holding Costing data entry screen

() You only need to use this screen if you need to add / amend the cost centre (Sub Project Code) information for the temp / student worker's post.

<b>Task - Additional/Change Post - Ma</b> Session Edit View Process Tools Di		ameters	<u> </u>
		14 6 🖌 🖍 🗏 🤫 🕁 🗃 🍎 🗃	
Employee 2086506 : MS L	LASTIC		
General			
Post Start Date	End Date		
Start Date	End Date		
Seq Start Date	End Date Detail	Notes	
			_
		un sun sun sun sun sun sun sun s	

4.1 Window-in to the Post field.

🌄 ME	)48G17 Employee's P	ost Selection					×
Seq	Post	Short Desc	Start Date	End Date	Туре	Main Flag	
001	WTOO-TBNK	TEMPBANK	01/07/2010				1
002	DDOO-TBNK	TEMPBANK	01/06/2010			γ	
							$\mathbf{v}$
,	Add <u>S</u> elect	Delete					

E<u>x</u>it

- 4.2 Select the relevant post from the list and click on Select.
- 4.3 Press Enter.

# Southampton

) 😢 🔇		'   🔪   🗅 😅	🖬   X 🖻	a 🕄 A´ A´ 🗏 🖘 🖆 🍅 🌦 🖨 🤶	
	2086506 : MS L	LASTIC			
General Post Start Dat	WT00-TBNK	Temp Ba	nk-S3RI Date		
Start Dat	e 01/07/:	2010 Enc	Date		
Seq	Start Date	End Date	Detail	Notes	<b>_</b>
					Y
Add	Change Dele	te			

- 4.4 Click on **Add**.
  - If there is already an existing line of data, then you will need to end date this original line first.
- 4.5 If this is the first line of data held against this post then enter the start date that the worker started in this assignment / post.
  - If there has been a change how the existing post is being funded then enter the date that this change becomes effective.
- 4.6 Enter through the **End Date** field.

#### 4.7 **Window in** to the **Details** button.

MD49G12 Costing Details							
Seq	Cost Centre	Ee's %	Er's %				
	en e		<u> </u>				
			-				
	dd Change Delete Expand						
			E <u>x</u> it				

- 4.8 Enter the relevant cost centre code (this is now known as the Sub Project Code at the University).
- 4.9 In the **Ee's %** column, enter the percentage that the temp / student worker will be paid from this cost centre (e.g. 100%).
- 4.10 In the **Er's %** column, enter the percentage that the temp / student worker will be paid from this cost centre (e.g. 100%).
- 4.11 Click on Exit to return to the **Post Holding Costing** screen.
- 4.12 Click on save.
  - () There are no Standard Letters produced by this process.