

This work instruction was last updated: 19th May 2010

Temp Bank Additional Post/Change of Post Process

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

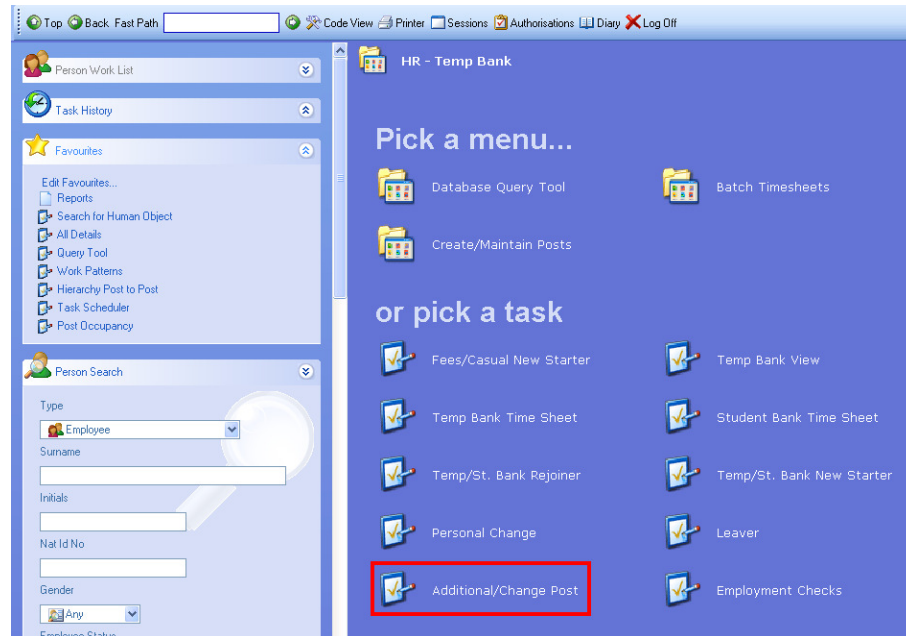
- Moving a temp from a temp post in one school to work in a temp post at another school
- Assigning a temp to an additional post in another school (i.e. the temp is working in more than one school)

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

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

- ① If the temporary worker is leaving one temporary assignment and moving to another follow the process outlined below.
- ① 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

Seq	Start	Post	M	Grade	Status	N	Detail	Summary
001	01/06/2010	DD00-TBNK	Y	GRADE 2A	N	Y

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

Seq	Start	Post	M	Grade	Status	N	Detail	Summary
001	01/06/2010	DD00-TBNK	Y	GRADE 2A	N	Y

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.

Seq	Code	Description	Score
001	GD001	Regrading of Post	
002	LG001	End of Fixed Term Contract	
003	LG002	End of FTC - End of Specialist Expertise	
004	LG003	End of FTC - Substantive Post Holder Ret	
005	LG0037	Retirement	
006	LG004	End of FTC - No Longer a Business Demand	
007	LG005	End of FTC - No Further Funding	
008	LG006	End of FTC - Completion of Project	
009	LG007	End of FTC - End of Training period	
010	LG008	No Confirmation of Probation	
011	LG009	Death in Service	
012	LG010	Dismissal - Conduct	

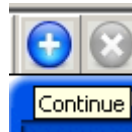
Buttons: Add, Select, Delete, Exit

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.

Termination Options	
General	
Fixed P/E Automatically Closed	Y
View Fixed PE Before Update	N
View Fixed PE After Update	N
Temp P/E Automatically Closed	N
View Temp PE Before Update	N
View Temp PE After Update	N
Training Automatically Closed	Y
View Training Before Update	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.

Seq	Start	Post	M	Grade	Status	N	Detail	Summary
001	01/06/2010	DD00-TBNK	Y	GRADE 2A	Status	N	Y	Summary

Buttons: Add, Change, Delete, Expand

Post Linking

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


Seq	Start	Post	M	Grade	Status	N	Detail	Summary
001	01/06/2010	DD00-TBNK	Y	GRADE 2A	Status	N	Y	Summary
002								

Buttons: Add, Change, Delete, Expand

Post Linking

- 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.

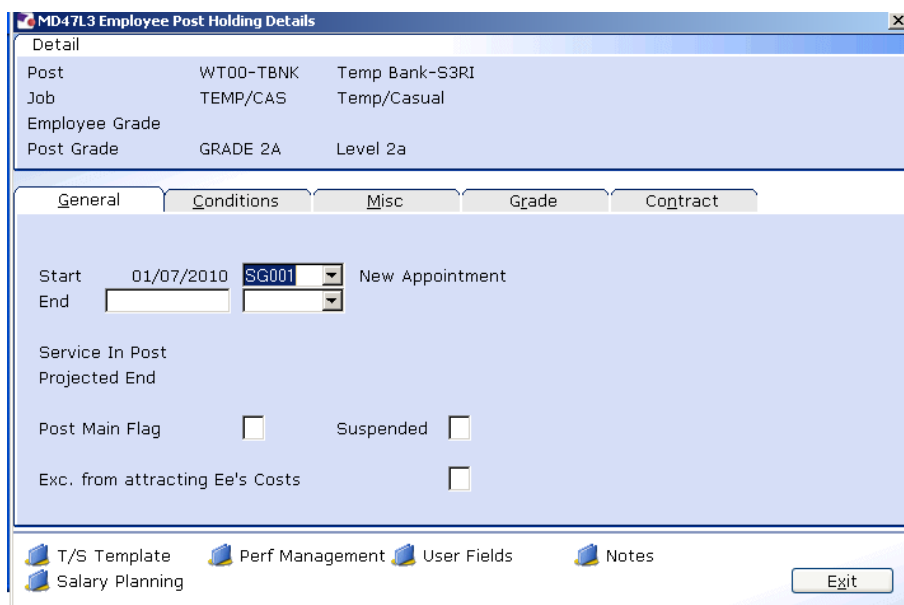
 All of the Temp Bank posts are in the format “XXnn-TBNK” and Student Bank posts are in the format “XXnn-STBNK” (the first two letters refer to the school / department – so “DD01-TBNK” is the Human Resources Temp Bank post, for example).

- 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.**



- 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:

MD4713 Employee Post Holding Details

Detail

Post	WT00-TBNK	Temp Bank-S3RI
Job	TEMP/CAS	Temp/Casual
Employee Grade		
Post Grade	GRADE 2A	Level 2a

General Conditions Misc Grade Contract

Service Cond ID: TEMP/CAS Temps / Casuals

Source: JOB

Position Status:

Occupancy:

Wk Pattern: DEFAULT Default Work Pattern

Source: POST

Contract Hours: 0.00 Weekly Hours: 36.00 Wks Per Year: 52.1430

Source: JOB FTE: 1.0000 WPY FTE: 1.0000

T/S Template Perf Management User Fields Notes

Salary Planning

Exit

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

MD55G27 Employee Service Conditions

General

Post: WT00-TBNK Temp Bank-S3RI

From: 01/07/2010 To:

Seq	Start Date	End Date	Service Condition	Description	Notes

Add Change Delete Expand

Exit

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.

MD55G30 Employee Position Status

General

Post WT00-TBNK Temp Bank-S3RI

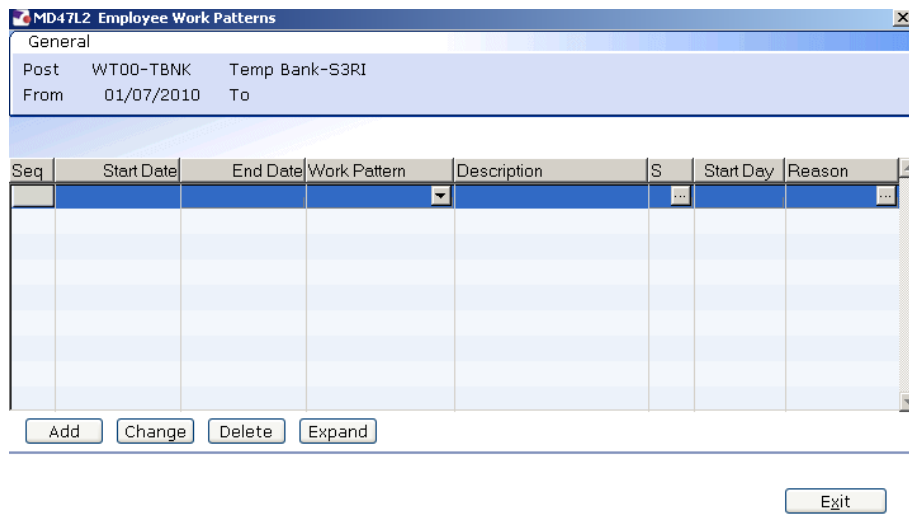
From 01/07/2010 To

Seq	Start Date	End Date	Position Status	Description	Notes
001	01/07/2010				...

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:



MD47L2 Employee Work Patterns

General

Post WT00-TBNK Temp Bank-S3RI

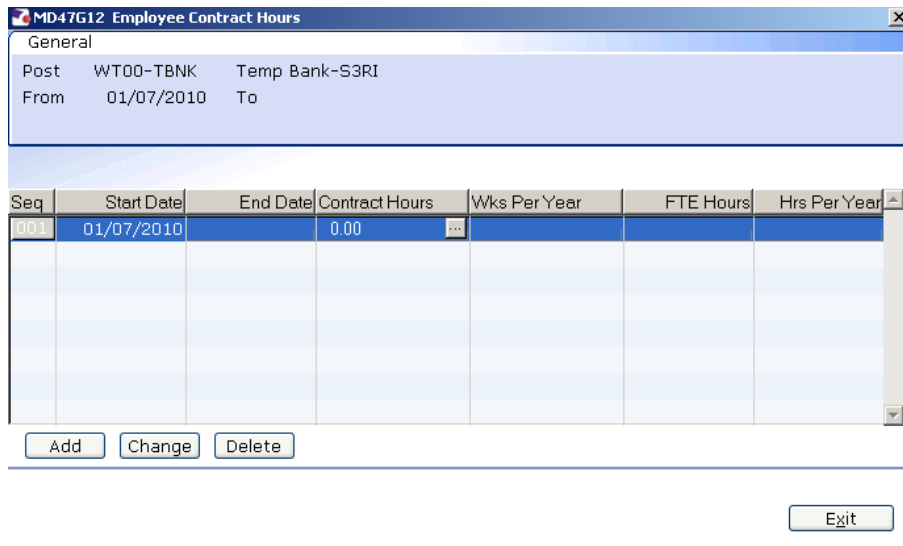
From 01/07/2010 To

Seq	Start Date	End Date	Work Pattern	Description	S	Start Day	Reason
				

Add Change Delete Expand

Exit

- 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 Contract Hours

General

Post WT00-TBNK Temp Bank-S3RI

From 01/07/2010 To

Seq	Start Date	End Date	Contract Hours	Wks Per Year	FTE Hours	Hrs Per Year
001	01/07/2010		0.00	...		

Add Change Delete

Exit

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

MD47L3 Employee Post Holding Details

Detail

Post	WT00-TBNK	Temp Bank-S3RI
Job	TEMP/CAS	Temp/Casual
Employee Grade	GRADE 2A	Level 2a

General Conditions Misc Grade Contract

Location

Location **HIGHFIELD** Highfield Campus, Southampton

Source POST

Average Pay

Average Pay Average Hours

Auto Recalc AvP ☐

T/S Template Perf Management User Fields Notes

Exit

- 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

Detail

Post WT00-TBNK Temp Bank-S3RI
Job TEMP/CAS Temp/Casual
Employee Grade
Post Grade GRADE 2A Level 2a

General Conditions Misc Grade Contract

Pay Grade **GRADE 2A** Level 2a
Source EMPPOST

Start Date 01/07/2010
End Date

Point
Point Amount
Point Rate

T/S Template Perf Management User Fields Notes
Salary Planning

Exit

- 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.

MD47G41 Employee Spinal Grade History

General

Post WT00-TBNK Temp Bank-S3RI
From 01/07/2010 T.

Seq	Start Date	End Date	Grade	Change Reason	Source	Grade	Point	N
001	01/07/2010		GRADE 2A	POSTPL	POSTGD			

Point Rate Enh. Rate Point Amount
Override Date Override Reason
Override Step Carry Forward
Bar Point Current Bar Point 12

Add Change Delete Expand

Exit

- 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.

Seq	Grade	Description
00017	GRADE 1B	Level 1b
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

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.

Seq	Start Date	End Date	Grade	Change Reason	Source	Grade	Point
001	01/07/2010		GRADE 2A	SG001	POSTPL	POSTGD	11

2.57 **ENTER** through the remaining fields.

2.58 Click on **Exit**.

2.59 Click on the **Contract** tab.

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.

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.

Seq	Start	End Date	Post	M	Status	N	Dtl	Summary
001	01/07/2010		WT00-TBNK		PS007	N	Y	...
002	01/06/2010		DD00-TBNK	Y	PS007	N	Y	...

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

Field	Value	Description
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

3.1 Move to the next data entry screen.


🌀 If there is already an existing line of data, then you will need to end date this original line first.

☛ If there has been a change how the existing post is being funded then enter the date that this change becomes effective.

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

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- 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.