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

## Temp Bank/Student Bank Leaver Process

This Work Instruction describes the Leaver Process. Follow this instruction for both Temp Bank and Student Bank workers.

- If a temp worker is a Multi Post Holder and they are only leaving one of their posts, please use the Additional Post/Change of Post work instruction.
- If a temp worker is a **Multi Post Holder** and they are leaving all of their posts then use this work instruction.

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 Entering a Leaver on ResourceLink
- 2 Personal Details data entry screen
- 3 Employment Detail data entry screen
- 4 Employee Current Post Holding data entry screen
- 5 Employee Temporary Pay Element data entry screen
- 6 Fixed Pay Elements data entry screen

## 1 Entering a Leaver on ResourceLink

1.1 HR Temp Bank - Leaver Task

Session Edit View Help		
<b>5 6</b> M -++	) 🚅 🔒 🙏 🛍 💼 🗛 🛋 🔲 📨 🌆 🗑 🌦 🕢 💡	
💿 Top 🎱 Back Fast Path 🚺 🎱	🖰 Code View 🔿 Printer 🔲 Sessions 🖄 Authorisations 🛄 Diary 🗙 Log Off	
Person Work List	🐣 🗰 HR - Temp Bank	
Task History		
Favourites (	Pick a menu	
Edit Favourites Reports Search for Human Object	Database Query Tool	
All Details Query Tool	Create/Maintain Posts	
Work Patterns     Post to Post     Task Scheduler	or nick a task	
- Post Occupancy	OI PICK a lask	
Person Search	🚱 Fees/Casual New Starter 📝	Temp Bank View
Type	📝 Temp Bank Time Sheet	
	🐶 Temp/St. Bank Rejoiner 📝	
Nat Id No	🚱 Personal Change	Leaver
Gender	Additional/Change Post	Employment Checks

1.2 The following search form is made available

Task - HRZ/Additional Incremen	its - Employee Sele	ection Screen	-		
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Employee Other N Match C Employee Number	umbers Stri Evant CP	ucture S artial	aved List 🕇	Employment	
Surname Sex Current Employee Y Previous Surname Known As		In Na As	itials at. Ins. No. at Date	24/03/2010	Search
Sumame	Inits Title	Emp Number	National ID Nu	mber	Start Date Fore
<u>S</u> elect E <u>x</u> it	Save List				
nter an Employee Number				CHANGE	NUM MD555:

- 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 Personal Details data entry screen

Task - Leaver - Employee Personal Detail
Employee 2086506 : MS L LASTIC
Title Details Legislation Type Surname LASTIC III First Forename LUCY Other Forenames Prev. Surname Known As Honours Generation
Personal Details       Gender     F       Date of Birth     31/10/1957       Nat. Ins. No.     TN311057F       Case Number
🥔 Home Address 🛛 Cont. Addresses 🥥 Passport/Visa 🎾 Contact Tel 🖋 Email Address 🥥 Marital Status 🥥 User Fields 💋 Notes
Enter the nerson's Surname

- 2.1 Ensure that the correct employee has been entered by verifying the contact details within the employee's **Personal Details** tab.
- 2.2 Click on **Home Address** <sup>I Home Address</sup>
- 2.3 Check details and update where necessary.

MD00G4 Maintain Address	Details 🔀						
Address							
Country	United Kingdom						
Address University of Southampton							
	University Road						
	SOUTHAMPTON						
	Hampshire						
Post Code	S017 1BJ						
🥸 <u>C</u> lear	🗾 <u>V</u> iew Postal						
🎎 <u>A</u> uto Complete	E <u>x</u> it						

- 2.4 Click on **Contact Tel** and update where necessary.
- 2.5 Move to the **Employment Detail** tab.

### 3 Employment Detail data entry screen

🖥 Task - Leaver - Employment Detail	<u>_   ×</u>
Session Edit View Other Process Tools Display Help	
Dates	
Original Start U1/06/2010 SG001 New Appointment	
To Staff	
Probation	
Additional	
Service	
Employee Type	
Self Service Unit	
Willing to Job Share TUPE N	
Notice Period	
No of current Posts	
🥥 Service Breaks 🧔 User Fields 🛛 🧔 Notes 🛛 🧔 Empl. History	
jEnter the employee's Original Start Date	

- 3.1 In the **Employment Detail** data entry screen, enter the date of the employee's last working day in the **Termination** field.
  - Dates MUST be entered in the format ddmmyyyy. For example 16031975 for 16 March 1975.
- 3.2 Press Enter.
  - If you receive the following message and the employee is a multi post holder and they are only leaving one of their posts – do not complete this task, click on OK, exit out of all screens that follow and cancel out of the task. Then follow the instructions on the first page of this Work Instruction

Northga	ste HR Client 🛛 🔀
(į)	Warning - This Employee has more than one Post which will be closed.
	OK

3.3 A warning prompt will appear confirming that the employee termination procedure has been triggered.



MD4751A/4 Date Change Warning Message	×
General	
The entry in the Termination Date box will set off the employee termination procedure on commit from this task	
	Exit

- 3.4 Click Exit.
- 3.5 Window in to the field next to the **Termination** date.
- 3.6 Click on a reason for leaving from the **Dependency Selection**.

🌄 MD	57G3 Dep	endency Selection		×
Seq	Code	Description	Score	
001	CB001	Career Break		
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		-
ļ ļ	\dd	Select Delete		
		[	E <u>x</u> it	

3.7 Enter through **all** the remaining fields on the **Employment Detail** screen until a **Termination Options** screen will then appear.

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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	Ν
View Temp PE Before Update	N
View Temp PE After Update	N
Training Automatically Closed	v
View Training Before Undate	Ň
View Training After Update	N
·····	F
Terminate Clocking Details	Y
Set Operator Obsolete	M



- 3.8 Click **Continue** to move through the **Termination Options** screen (there is no need to tab through this screen's fields).
- 3.9 You will be returned to the **Employment Detail** screen.

🌠 Task -	Leaver - Employmen	t Detail			_ 🗆 🗵
Session E	Edit View Other Pro	ocess Tools Display He	*lp		
0	3 🕥 🜔 🎯 🛛	⇒ 🖻 📉 🗅 🛛	差 🖬   👗 🖻	a 🖬 🗛 🔺 🗉 👘 🏚 🍪 🌚 🖓 💡	
Emp	oyee 2086506 :	MS L LASTIC			
Dat	tes				
Orig	jinal Start	01/06/2010	SG001 🛄	New Appointment	
Curr	rent Start	01/06/2010 S	SG001 🔄	New Appointment	
Terr	mination	01/07/2010 L	.G039 <u></u>	End of Assignment	
TO S	Staff				
Prob	pation				
Ado	litional				
Sen	vice				
Emp	lovee Type				
Self	Service Unit		-		
Willi	ng to Job Share		TUPE	N	
Noti	ice Period	<b>•</b>		-	
No (	Of Current Posts				
	Service Breaks	🥖 User Fields	🥖 Notes	s 🥥 Empl. History	
I					

3.10 Move to the next screen

### 4 Employee Current Post Holding data entry screen

4.1 Check the **Current Post Holding** screen. If you have set up a leaver whose leaving date was in the past, the employee's post should have been removed from this **Current Post Holding** screen. If you have set up a leaver whose leaving date is in the future, the post(s) will remain until this date has elapsed.

e.g. Leaving date in the past ...

T 🚰	ask - Le	aver - Employee	Current Post Detai	5						
Sessi	ion Edit	View Process	Tools Display Help	)						
	0	00	<b>5</b> 6   x		🖻 🖬   🐰 🖻	B A A	<b>,</b>   E		) 👸 🎽 😭 🗇 🦹	
	Employ	/ee 2086506	: MS L LASTIC							
	Seq	Start	Post	М	Grade	Status	N	Detail	Summary	
										<u> </u>

e.g. Leaving date in the future...

🏹 Т	ask - Le	aver - Employee	Current Post Det	ails						
Sessi	on Edi	t View Process	Tools Display H	elp						
	) 😢		<b>5</b> 6 🕅 -	-   🗅	🖻 🖬   🐰 🖻		<b>,</b>   E		) 👸 🌦 🔓 📄 🢡	
E	mplo	yee 2086506	: MS L LASTIC	:						
	Seq	Start	Post	M	Grade	Status	N	Detail	Summary	
	001	01/06/2010	DDOO-TBNK	Y	GRADE 2A	PS007	N	Y		A

4.2 Move to the next screen

## 5 Employee Temporary Pay Element data entry screen

🔽 Task - Leaver - Employee Post Holding History	
? ⇒ ☆ ☆ ☆ ☆ ☆ ⇒ □ ☆ ₩ % ₩ ≅ ▲ ▲ ■ ∞ ● ♥	
Employee 2086506 : MS L LASTIC	
Tax Period	
Tax Year Tax Period	
General Advance	
Sick All Period Suspend Advance Periods	
Seq Post MD48L20A Tax Year And Period X General Tax Year 2010 Tax Period Pay Type X Exit	
Add Change Delete Expand	
🧶 Advance 🧶 Currency 🚳 Arrears 🚳 Select Period	
Tax year	

- 5.1 **ENTER** through the **Tax Year and Period Screen**.
- 5.2 Click Exit. The following warning will appear:



Click OK.

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Task - Leaver - Temporary Pay Element Summary Screen     Session Frit View Other Process Tools Display Help	<u>_   ×</u>
S S S S S S S S S S S S S S S S S S S	
Employee 2086506 : MS L LASTIC	
Tax Period	
Tax Year 2010 Tax Period 02	
General Advance Pay Method Advance Periods	
Sick All Period 🔲 Suspend 🔲 Advance Type	
Seq Post Code Desc I Amount O Ride Detail	_ <b>^</b>
Add Change Delete Expand	-
Advance Acreary Arrears Select Period	
IllEnter The Pay Method	

5.3 **ENTER** through the fields and then a table will appear below.

🏹 Tas	k - Lea	ver - 1	Tempo	rary Pay I	Elemen	t Summ	ary Scr	een					_ 🗆 ×
Session	Edit	View	Other	Process	Tools	Display	Help						
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En	ploy	ee 2	0865	06 : MS	LLAS	STIC							
Г	ax Pe	eriod											
	Тах Ү	ear	20	10	Tax P	eriod	02	2					
								Adverse					
	seriera			_				Auvance	_ ·				
	Рау М Сселения	letho						Advance	e Peri	ods			
	SICK A	AII Pei	rioa		Su	spena		Advance	зтур	e			
s	ea Pi	ost		Code	Desi	-	1	Amount		0 Bide	Detail		<b>A</b>
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													<b>V</b>
	Add		Chan	ge De	elete	Expa	and						
	道 Ac	lvanc	e	0	Curre	ency		🙆 Arrears		2	Select Perio	d	
				aureas abirrer									
Pseud	o-Seque	nce Ni	mber fo	v Index Da	aina								

5.4 Click on Add.

E<u>x</u>it



5.5 Type in **1300** if the employee is a temp bank worker and **1500** if they are a student bank worker in the **Pay Element** field and click **Exit**.

🌠 MD48G84 'R' Type F	ay Element Detail	X
Pay Element		
Pay Element ID Post	1300 Temp Bank Hours	
Start Date	End Date	
Detail		
Units	Units Table	
Rate 🛛	2nd Currency Rate Table	
Amount	2nd Currency	
Cost Code		

5.6 Window in to the **Post** field.

🌄 MD	)48G17 Employee's P	ost Selection					×
Seq	Post	Short Desc	Start Date	End Date	Туре	Main Flag	
001	DD00-TBNK	TEMPBANK	01/06/2010	01/07/2010		Y .	<b></b>
							-
,	Add <u>S</u> elect	Delete					
						E <u>x</u> it	

5.7 Select the worker's relevant post by clicking on the **Post** details line or by highlighting the desired row and then clicking on **Select.** 



5.8 **ENTER** through all remaining fields until you are taken back to the table, which will now be populated with a new line of information.

Task - Leaver - Temporary Pay Element Summary Screen	
Session Eat view Other Process Tools Display Help	
Tax Period	
Tax Year 2010 Tax Period 02	
General	
Pay Method Advance Periods	
Sick All Period Suspend Advance Type	
Seq Post Code Desc I Amount O Ride Detail	
001 DD00-TBNK 1300 TB Hrs Calculated	
Add Change Delete Expand	
🥒 🥒 Advance 🥥 Currency 😰 Arrears 😰 Select Period	
Pseudo-Sequence Number for Index Paging	

5.9 Move to the **Fixed Pay Elements** screen.

## 6 Fixed Pay Elements data entry screen

🏹 Task -	Leave	er - Er	nploy	/ee P	'ay Ele	ments	- Detail											<u>_     ×</u>
Session	Edit V	iew	Other	Pro	ocess	Tools	Display	Help	- 1							1	- 1	
<b>(</b>	3 🤇			<b>)</b>	26			ן 🔁 🕻			A A		••   t	9 8 8	9 🗐	9 1	?	
Emp	loyee	20	1865	06	: MS I	LAS	тіс											
Car	Dee					Deer						Charle		Davia	أمير في ام			
Sec	1 Pos	a			Joue	Desc						Stan		Pend	ia Ami		wija	
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	Curr	ency	/	_		_				_			_				_	
Pseudo-S	Sequenc	e Nun	nber fo	or Ind	lex Pagi	ng												

- Generally there will be no fixed pay elements relating to Temp Bank / Student Bank workers.
- () If there are any fixed pay elements these will be dealt with by Payroll.
- 6.1 Click on **Save** 
  - There are no Standard Letters relating to the Temp Bank/Student Bank Leaver Process