

This work instruction was last updated: 19th 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.

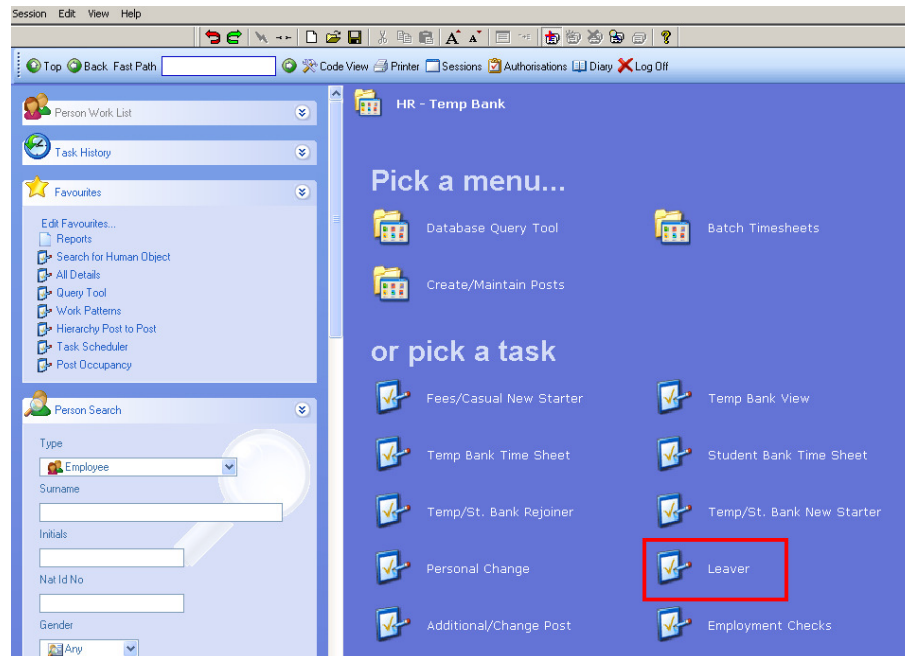
- ☛ If a temp worker is a **Multi Post Holder** and they are only leaving **one** of their posts, please use the **Additional Post/Change of Post** work instruction.
- ☛ If a temp worker is a **Multi Post Holder** and they are leaving all of their posts then use this work instruction.

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



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 Personal Details data entry screen

Task - Leaver - Employee Personal Detail

Session Edit View Other Process Tools Display Help

Employee 2086506 : MS L LASTIC

Title Details

Legislation Type

Surname: LASTIC

Title: MS

First Forename: LUCY

Other Forenames:

Prev. Surname:

Known As:

Honours:

Generation:

Personal Details

Gender: F


Date of Birth: 31/10/1957 Age: 52 Years 6 Months

Nat. Ins. No.: TN311057F Case Number:

Home Address Cont. Addresses Passport/Visa Contact Tel

Email Address Marital Status **User Fields** Notes

Enter the person'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**  Home Address
- 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: SO17 1BJ

Clear Auto Complete View Postal

Exit

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

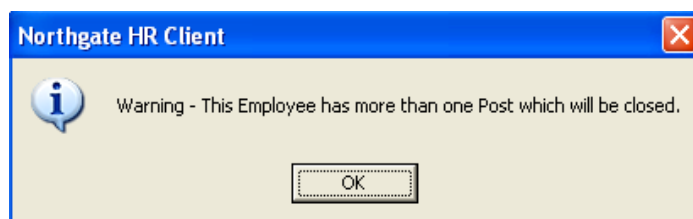
3 Employment Detail data entry screen

3.1 In the **Employment Detail** data entry screen, enter the date of the employee's last working day in the **Termination** field.

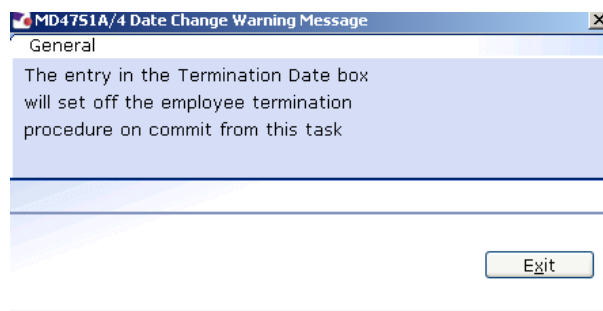
- ☛ Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.

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*



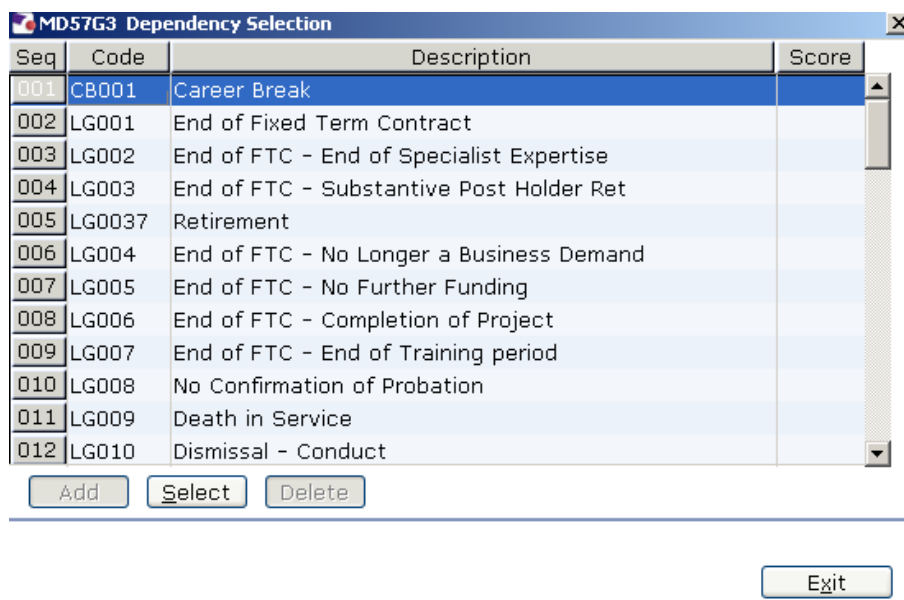
3.3 A warning prompt will appear confirming that the employee termination procedure has been triggered.



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**.



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

Task - Leaver - Termination Options

Session Edit View Process Tools Display Help

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

Enter "Y" to view fixed pay elements prior to update



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 - Employment Detail

Session Edit View Other Process Tools Display Help

Employee 2086506 : MS L LASTIC

Dates

Original Start SG001 New Appointment

Current Start SG001 New Appointment

Termination LG039 End of Assignment

To Staff

Probation

Additional

Service

Employee Type

Self Service Unit

Willing to Job Share TUPE

Notice Period

No Of Current Posts

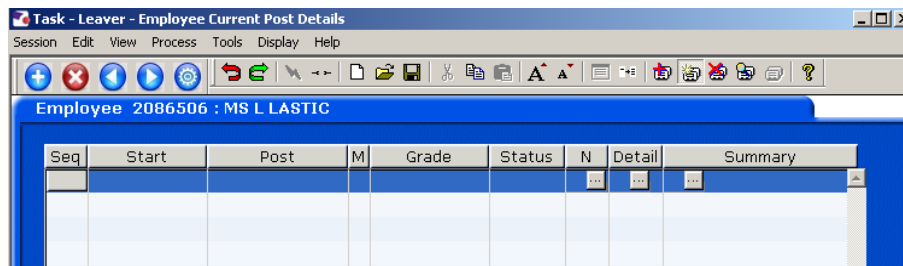
Service Breaks User Fields Notes Empl. History

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.

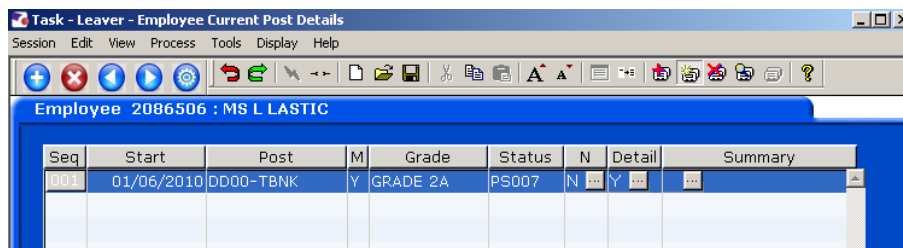
e.g. Leaving date in the past ...



The screenshot shows a software window titled "Task - Leaver - Employee Current Post Details". Below the title bar is a menu bar with "Session", "Edit", "View", "Process", "Tools", "Display", and "Help". A toolbar with various icons is located below the menu bar. The main area displays "Employee 2086506 : MS L LASTIC". Below this is a table with the following columns: Seq, Start, Post, M, Grade, Status, N, Detail, and Summary. The table is currently empty.

Seq	Start	Post	M	Grade	Status	N	Detail	Summary
-----	-------	------	---	-------	--------	---	--------	---------

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



The screenshot shows the same software window as above, but the table now contains one row of data.

Seq	Start	Post	M	Grade	Status	N	Detail	Summary
001	01/06/2010	DD00-TBNK	Y	GRADE 2A	PS007	N	Y	

- 4.2 Move to the next screen

5 Employee Temporary Pay Element data entry screen

Task - Leaver - Employee Post Holding History

Session Edit View Help

Employee 2086506 : MS L LASTIC

Tax Period

Tax Year Tax Period

General

Pay Method Suspend ☐

Advance

Advance Periods

Advance Type

Seq Post

MD48L20A Tax Year And Period

General

Tax Year 2010 Tax Period Pay Type

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:

Task - Leaver

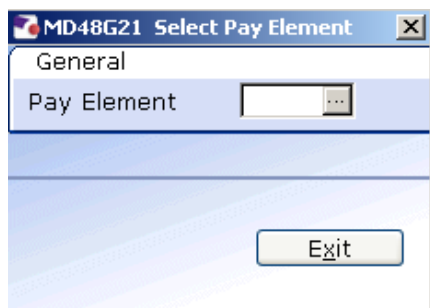
Warning - Employee leaving in or after this period, on 01/07/2010

OK

Click **OK**.

[illegible]

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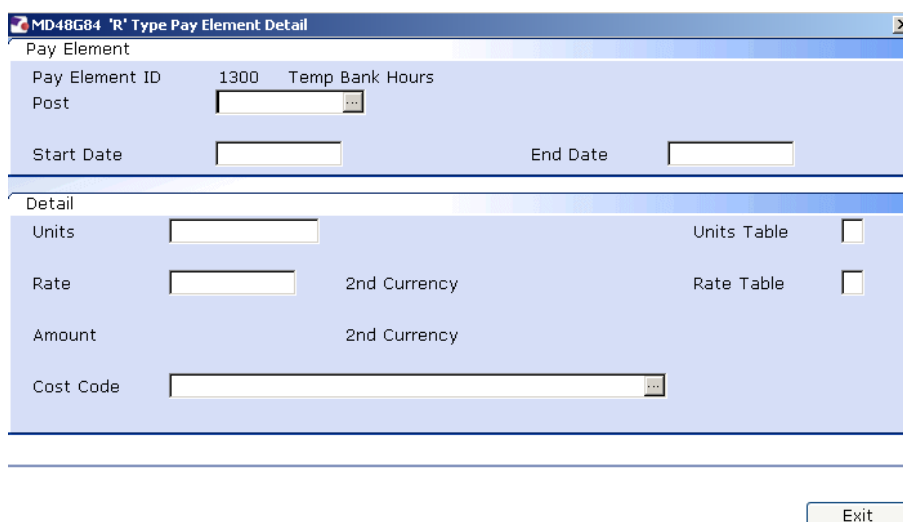
MD48G21 Select Pay Element

General

Pay Element

Exit

- 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 Pay Element Detail

Pay Element

Pay Element ID 1300 Temp Bank Hours

Post

Start Date End Date

Detail

Units Units Table ☐

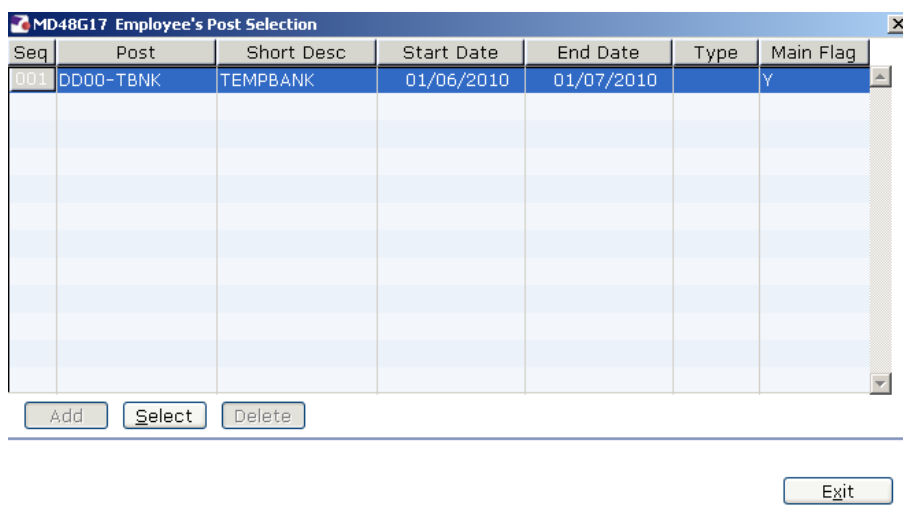
Rate 2nd Currency Rate Table ☐

Amount 2nd Currency

Cost Code

Exit

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



MD48G17 Employee's Post Selection

Seq	Post	Short Desc	Start Date	End Date	Type	Main Flag
001	DD00-TBNK	TEMPBANK	01/06/2010	01/07/2010		Y

Add Select Delete

Exit

- 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.

The screenshot shows a software window titled "Task - Leaver - Temporary Pay Element Summary Screen". The window has a menu bar (Session, Edit, View, Other, Process, Tools, Display, Help) and a toolbar with various icons. The main area is divided into several sections:

- Employee:** 2086506 : MS L LASTIC
- Tax Period:** Tax Year 2010, Tax Period 02
- General:** Pay Method (dropdown), Sick All Period (checkbox), Suspend (checkbox).
- Advance:** Advance Periods, Advance Type.
- Table:** A table with columns: Seq, Post, Code, Desc, Amount, O Ride, Detail. The first row is highlighted in blue and contains: 001, DD00-TBNK, 1300, TB Hrs, Calculated, , .
- Buttons:** Add, Change, Delete, Expand.
- Footer:** Pseudo-Sequence Number for Index Paging.

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

