

**This work instruction was last updated: 18<sup>th</sup> May 2010**

## **Temp Bank/Student Bank New Starter Process**

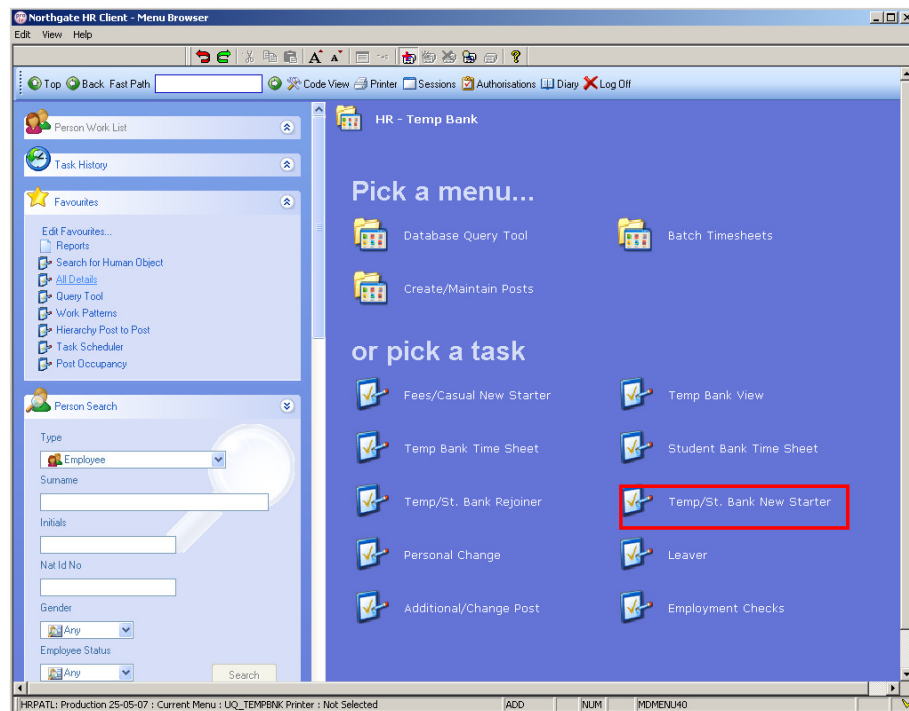
This Work Instruction describes the Temp Bank/Student Bank New Starter Process. It will also be followed to enter data for rejoiners.

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 New Starter

## 1.1 HR – Temp Bank select Temp/St. Bank New Starter



## 1.2 The following search form is made available

- Check the system to ensure the staff member does not have a record

## 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
- 1.6 If No Employee is select enter the details and select Add

Employee | Other Numbers | Structure | Saved List | Employment

Match: ☒ Exact ☐ Partial

Employee Number:

Surname:  Initials:

Sex:  Nat. Ins. No.:

Current Employee:  As at Date:

Previous Surname:

Known As:

**Task - Temp/St. Bank New Starter**

Warning - No Employees selected in search

OK

Surname	Start Date	Forename

- 1.7 The new staff number will be generated select Yes

**CTDIALOG Dialogue Box**

General

The next available Employee Number is '2086506'. Accept?

Yes No

## 2 Personal Details data entry screen

2.1 Enter all known details in the relevant fields. If you do not know the National Insurance Number a temporary one will be generated by ResourceLink.

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

2.2 Click on **Home Address** to enter the address details.

2.3 Enter the **Post Code** and press **ENTER**.

MD00G4 Maintain Address Details

Address

Country  United Kingdom

Address

Post Code  SO17 1BJ

Clear View Postal

Auto Complete

2.4 Click on **Auto Complete**.

Multiple Matches Found - Please Select

SO17 1BJ University of Southampton, University Road, Southampton, Hampshire  
SO17 1BE University of Southampton, Synthetic Chemistry Building, University Road, Sout...  
+SO17 University Road, Southampton, Hampshire  
+SO17 University Road, Southampton, Hampshire

Back

2.5 If given options Click on the correct address.

2.6 Click on **Exit**.

MD00G4 Maintain Address Details

Address


Country  United Kingdom

Address  University of Southampton  
 University Road  
 SOUTHAMPTON  
 Hampshire

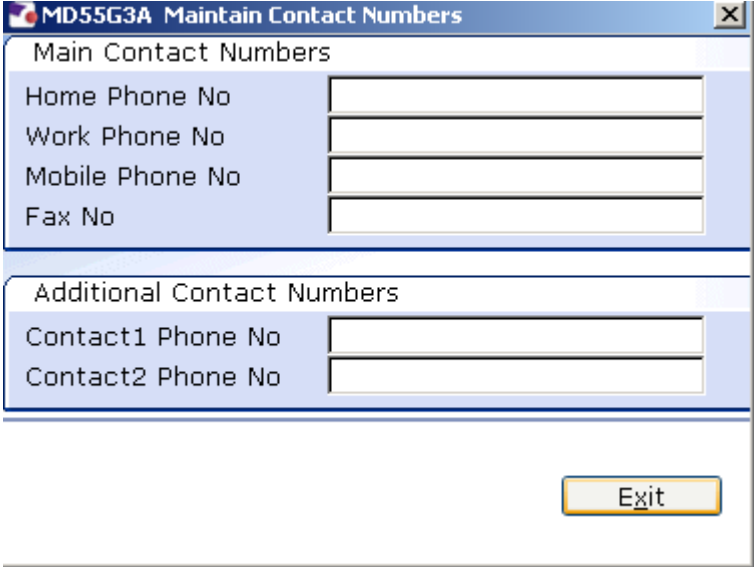
Post Code  SO17 1BJ

Clear View Postal

Auto Complete

 Click on **View Postal** to see how the address will be displayed on printed documentation.

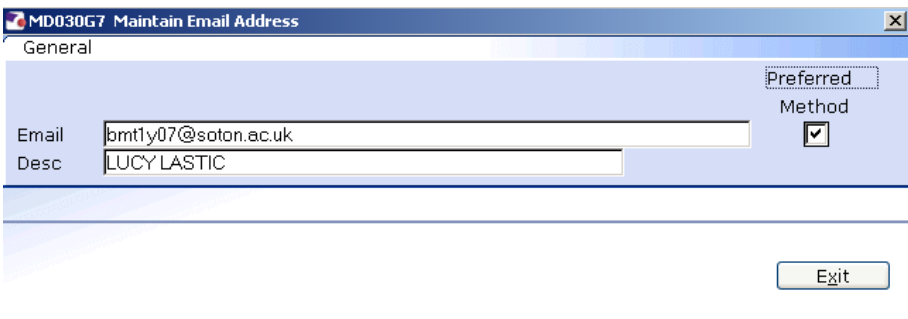
2.7 Click on **Contact Tel** to enter the contact telephone details.



The dialog box titled "MD55G3A Maintain Contact Numbers" has a close button (X) in the top right corner. It contains two sections: "Main Contact Numbers" and "Additional Contact Numbers". The "Main Contact Numbers" section has four input fields labeled "Home Phone No", "Work Phone No", "Mobile Phone No", and "Fax No". The "Additional Contact Numbers" section has two input fields labeled "Contact1 Phone No" and "Contact2 Phone No". An "Exit" button is located at the bottom right of the dialog box.

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

2.9 Click on **Email Address** to enter the email address details.



The dialog box titled "MD030G7 Maintain Email Address" has a close button (X) in the top right corner. It has a "General" tab selected. The "General" section contains two input fields: "Email" with the value "bmt1y07@soton.ac.uk" and "Desc" with the value "LUCY LASTIC". To the right of these fields is a "Preferred Method" checkbox, which is checked. An "Exit" button is located at the bottom right of the dialog box.

 We **are** using the **Preferred Method** field.

2.10 Enter the email address and click on **Exit**.

2.11 Click on **Marital Status** to enter the relevant information.

2.12 Click on **Add** to enter data.

Seq	Start Date	Marital Status	Verified?
001			

Add Change Delete

Exit

2.13 Enter the **Start Date** of the status if known - if not, press **ENTER** to pass the field.

2.14 Click on the drop down and select the **Marital Status**.

Seq	Start Date	Marital Status	Verified?
001			

Code	Desc	Long Description
CP	Civil	Civil Partnership
D	Divorced	Divorced
LWP	LWP	Living With Partner
M	Married	Married
S	Single	Single
UNK	Unknown	Unknown
W	Widowed	Widowed

2.15 If the marital status has been verified, enter a **Y** in the **Verified** field.

2.16 Click **Exit**.

2.17 Click on **User Fields** to enter the **Pay Point**.

Field Label	Field Contents	Description
Unique Identifier		
<b>Pay Point</b>		
Trade Union Opt Out		
Research Passport ID		
Res Passport Expiry		

Pay Point

Exit

- 2.18 Click on **Pay Point** and on the drop down arrow in the field. The following dialog box will appear.

Search

Narr Code

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

Exit

- 2.19 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

- 2.20 Click on the required **Pay Point** and then click on **Exit**.
- 2.21 Move to the next data entry screen.

### 3 Equal Opportunities data entry screen

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**.

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

MD55L15 Illness or Incapacity Reasons			
Seq	Code	Description	
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


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.

The description will appear as you **ENTER** through the fields.

3.6 If the disability has been registered type **Y** in the **Reg** field.

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

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

Field Label	Field Contents	Description
<b>Date First App HEI</b>		
Previous Employment		
Previous HEI		
Highest Acad Qual		
Academic Disp 1		
Academic Disp 2		

Date First App HEI

Exit

3.9 In **Date 1<sup>st</sup> App CurrHEI** – enter the date that the starter was first employed at the University of Southampton.

3.10 Click on **Previous Employment** and click on the drop down menu.

MD37G4A Narrative Table Search

Search

Narr Code

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

Exit

3.11 Press **Enter**.

MD37G4A Narrative Table Search

Search

Narr Code

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

Add Select Delete

Exit

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

**MD37G4A Narrative Table Search**

Search

Narr Code

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

Add Select Delete

Exit

3.15 Scroll down the list and click on the new starter's previous HEI.

3.16 Click on the drop down of the **Highest Acad Qual** field.

3.17 Press **Enter**.

**MD37G4A Narrative Table Search**

Search

Narr Code

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

Add Select Delete

Exit

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

3.19 Click on the drop down of the **Academic Disp 1** field if applicable.

3.20 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

3.21 Click on the drop down menu for the **Academic Disp 2** field if applicable.

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 2nd Academic Discipline of the new starter.

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

3.25 Press **Enter**.

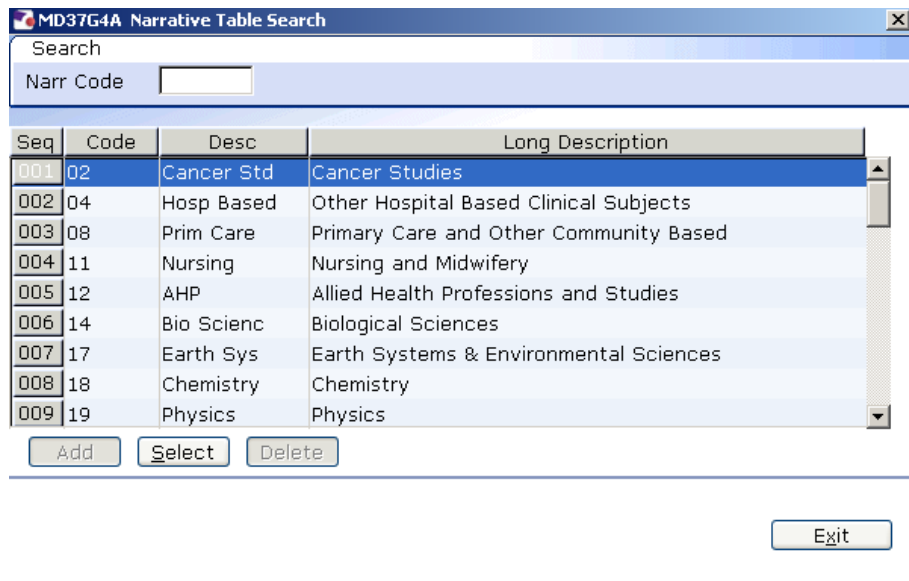
Seq	Code	Desc	Long Description
001	00	NtCurrReg	Not currently registered to practice
002	01	GMC	General Medical Council
003	02	GDC	General Dental Council
004	03	GOC	General Optical Council
005	04	RPSGB	Royal Pharmaceutical Society of GB
006	05	PSNI	The Pharmaceutical Society of Nireland
007	06	NMC	The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

- 3.26 Scroll down the list and click on the new starter's Regulatory Body.
- 3.27 Leave the **Date Left HEI** field blank – when a leaver action is entered for this employee the screen will auto complete.
- 3.28 Leave the **Leaving Destination** blank.
- 3.29 Click in the drop down menu for the **Active Last Res** field, which records whether the person was active at the last research survey.
- 3.30 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	Empldy	Employed by the rep institution on311007
004	9	NotEmployd	Not employed by the institution 311007
005	X	Default	Default

- 3.31 Click on the description that applies to the new starter.
- 3.32 Click in the drop down in the **Unit of Assessment** field.

3.33 Press **Enter**.



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

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

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

3.36 Move to the next data entry screen.



## 4 Employment Detail data entry screen

- 4.1 Type in the **Original Start** date and press **ENTER**.
  - ☛ Dates **MUST** be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.
- 4.2 **Window in** to the next field and select the appropriate reason. This will usually be **SG001 New Appointment**.
  - ☛ You will have to enter the Reason again in a later field – you must be consistent.
- 4.3 Press **ENTER**.
- 4.4 Enter the **Current Start** date and press **ENTER**.
  - ❗ If you see a warning dialogue box regarding holiday entitlement just click **OK**.
- 4.5 **Window in** to the next field and select the appropriate reason. This **MUST** be the same as used previously
- 4.6 Move to the next data entry screen.

## 5 Relationship Summary data entry screen

- 5.1 Click on **Add** to enter the details of the employee's next of kin.

Seq	Code	Description	Emp No.	Dets	UF	Notes
001						

Code	Desc	Long Description
EMER	Emergency	Emergency Contact
NOK	Next Kin	Next of kin

- 5.2 Click on the down arrow in the **Code** field and select **NOK**.
- 5.3 **ENTER** past the **Emp No.** field.
- 5.4 **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

- 5.5 Click on the **Address** and **Telephone** fields to enter this information.
- 5.6 Click on **Exit**.
- 5.7 If you wish to add more than one next of kin contact repeat the process
- 5.8 Move to the next data entry screen.

## 6 Employee Work Permit data entry screen

- ❗ This screen only needs completing if the new temp / student bank starter that you are entering requires a work permit / visa to work in the UK.

- 6.1 If the new temp / student bank starter does need a work permit / visa to work in the UK then click on **Add** to enter these details.

Enter the following information as appropriate (use the **Tab** key to move between fields):

- The date when proof of ID was given
- The date the Work Permit is valid from
- The date the Work Permit is valid to
- The date the Work Permit is extended to (if appropriate)
- The Work Permit/Visa number
- Indicate whether a Home Office letter has been issued
- Whether indefinite leave to remain has been granted (Y) and, if so, on which date.

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

- 6.2 Move to the next data entry screen.

## 7 TempBank Contact Details data entry screen

- ① This screen is designed for TempBank staff to record information about a TempBank worker's availability and also what skills / experience they may have.

Field Label	Field Contents	Description
<b>Availability</b>		
Computer Skills		
Finance Skills (1)		
Finance Skills (2)		
PA/Secretarial Skill		
Admin Skills		

Availability

Exit

- ① All of the lines have a free text entry field, which means that you can type in any text (or dates) that you think are relevant (up to 25 characters on each line).
- 7.1 Once you have completed all of the lines which are relevant to the particular TempBank worker you are setting up, then click on **Exit**.
  - 7.2 Move to the next data entry screen.

## 8 Basic Pay Details data entry screen

Task - Temp/St. Bank New Starter - Basic Pay Detail

Session Edit View Other Process Tools Display Help

Employee 2086506 : MS L LASTIC

Pay Control

Pay Group

Ctrl group

Pay Type

Pay Method  Cheque

Cheque Pay

Other

Last Paid Year

Period

Date

Suspended Flag  Backdate NI ☐

Industrial Action

Starter Flag

P.Grp History Fin Inst Det Additional P45(Leaver)

Pay Currency Notes

### 8.1 Window in to the Pay Group field.

MD45G3 Structure Unit Group selection

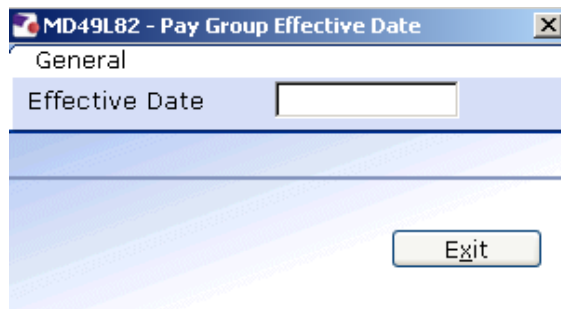
Seq	Structure	Description	Level
001	PSUB1	Staff	SubPayroll
002	PSUB2	Pensioners	SubPayroll
003	PSUB3	Fees/Casual	SubPayroll
004	PSUB4	Teachers	SubPayroll
005	PSUB5	Unpaid	SubPayroll
006	PAYROLL1	(Main Payroll)	Payroll
007	PAYROLL2	(Teachers Payroll)	Payroll
008	PAYROLL3	(Unpaid)	Payroll

Add Select Delete Expand

Exit

### 8.2 Select the correct PSUB Pay Group. Temp Bank starters must always be attached to **PSUB3 (Fees/Casual)**.

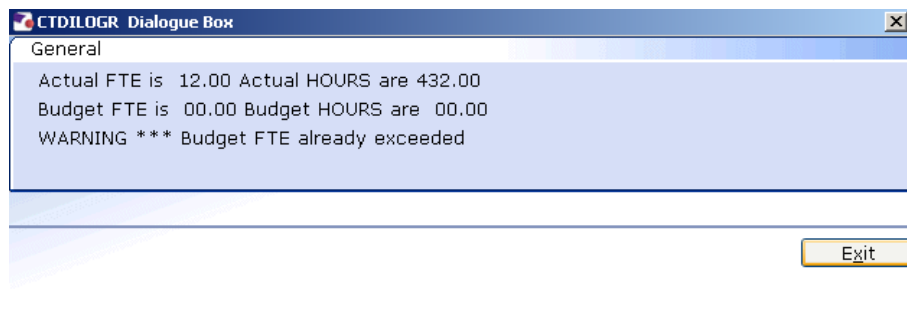
### 8.3 Press **ENTER**. The following dialog box will appear:



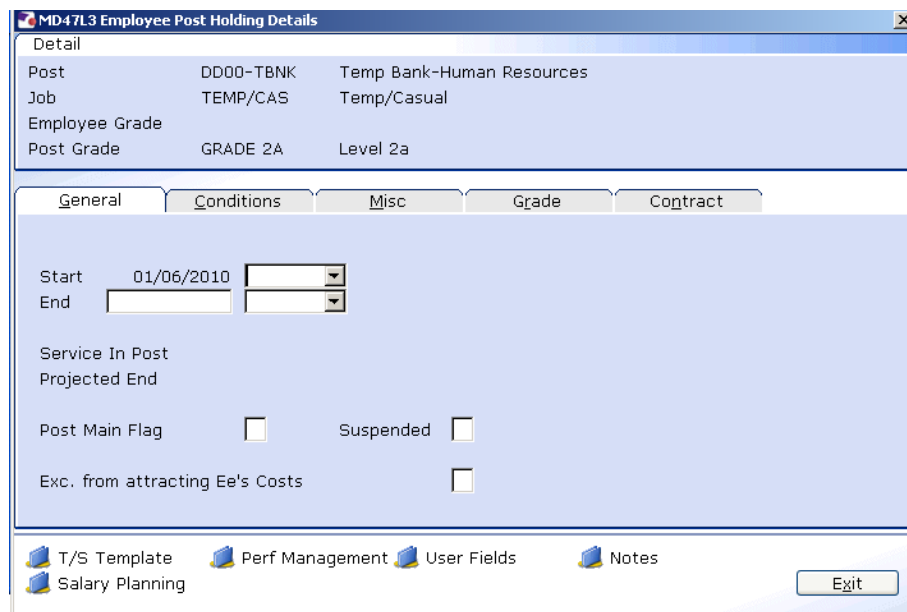
- 8.4 Type the **start date** into the **Effective Date** field and press **Enter**.
- Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.
- 8.5 Leave the **Pay Method** as **CHEQUE**.
- 8.6 Press **Enter**.
- 8.7 Enter **N** in the **Suspended Flag** field.
- 8.8 Move to the next data entry screen.

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9.6 Click in the **Detail** field and **window in**.



9.7 Click on the drop down list to the right of the **Start Date**. A list of reasons will be displayed:

Seq	Code	Description	Score
025	PJL022	Fees/Casual to Visitor	
026	PJL023	Temporary to FTC	
027	PJL024	Transfer to Pensioner	
028	SG001	New Appointment	
029	SG002	New Appointment After Retiring	
030	SG003	Visitor Appointment	
031	SG004	Rejoiner to University	
032	SG005	Additional Post	
033	SG007	Extension to Fixed Term Post	
034	SG009	New Assignment -Temp Bank	
035	SG010	Post to Post Conversion	

Buttons: Add, Select, Delete, Exit

9.8 Select the appropriate reason for this New Starter. In most cases this will be **SG001- New Appointment**.

- ☛ You will have to enter the Reason again in a later field – you must be consistent.

9.9 Type **Y** in the **Post Main Flag** field if this is the employee's main post.

- ☛ (If a temp worker holds more than one current post then enter a **Y** in the **Post Main Flag** field on the post that they work most hours in and leave this field empty in their other post(s).

9.10 Press the **Enter** key to move through the remaining fields and on to the **Conditions** tab.

**MD4713 Employee Post Holding Details**

Detail

Post	DD00-TBNK	Temp Bank-Human Resources
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

### 9.11 Window in to the Service Cond ID field

**MD55G27 Employee Service Conditions**

General

Post	DD00-TBNK	Temp Bank-Human Resources
From	01/06/2010	To

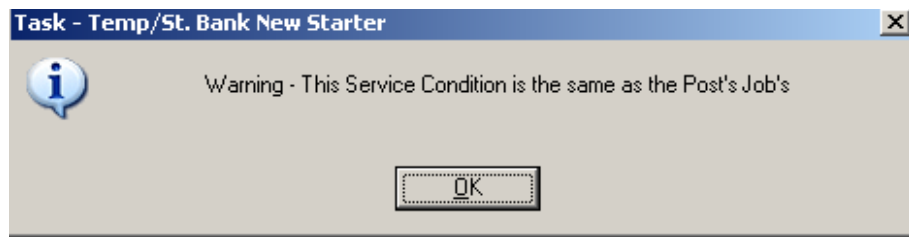
Seq	Start Date	End Date	Service Condition	Description	Notes
001	01/06/2010				

Add Change Delete Expand

Exit

9.12 Click on **Add** and press **Enter** four times to pull through the Service Conditions.

9.13 The following warning dialogue box will appear:



Click **OK**.

9.14 Click **Exit**.

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

The "MD55G30 Employee Position Status" window displays the following information:

General  
 Post DD00-TBNK Temp Bank-Human Resources  
 From 01/06/2010 To

Seq	Start Date	End Date	Position Status	Description	Notes
001	01/06/2010				

Buttons at the bottom: Add, Change, Delete, Expand, Exit.

9.16 Click on **Add**.

9.17 Press **Enter** twice to move to the **Position Status** field and display the drop down list.

**MD55G30 Employee Position Status**

General

Post DD00-TBNK Temp Bank-Human Resources

From 01/06/2010 To

Seq	Start Date	End Date	Position Status	Description	Notes
001	01/06/2010				

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

Add Change Delete Expand

Exit

- 9.18 From the drop down list select **PS007 (TBANK)** for a temp bank worker or **PS018 (STDBANK)** for a student bank worker.
- 9.19 Press **Enter** to move through the remaining fields and click **Exit**.
- 9.20 **Window in** to the **Wk Pattern** field. The following screen will appear:

**MD47L3 Employee Post Holding Details**

Detail

Post DD00-TBNK Temp Bank-Human Resources

From 01/06/2010 To

**MD47L2 Employee Work Patterns**

General

Post DD00-TBNK Temp Bank-Human Resources

From 01/06/2010 To

Seq	Start Date	End Date	Work Pattern	Description	S	Start Day	Reason
001	01/06/2010						

Add Change Delete Expand

Exit

- 9.21 Click on **Add** and enter through the fields until you get to **Start Day**.
- 9.22 Enter the digit "1" into the **Start Day** field.
- 9.23 **Window in** to the **Reason** field and select the reason for the appointment.

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

- 9.24 **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

- 9.25 Press **ENTER** and **Exit**.

- 9.26 Click on to the **Misc** tab.

MD47L3 Employee Post Holding Details

Detail

Post DD00-TBNK Temp Bank-Human Resources

Job TEMP/CAS Temp/Casual

Employee Grade GRADE 2A Level 2a

Post 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

Salary Planning

Exit

- 9.27 **Window in** to the **Location** field.

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**MD47L3 Employee Post Holding Details**

Detail

Post DD00-TBNK Temp Bank-Human Resources  
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 01/06/2010  
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)

### 9.35 Window in to the **Pay Grade** field.

**MD47G41 Employee Spinal Grade History**

General

Post DD00-TBNK Temp Bank-Human Resources  
From 01/06/2010 T.

Seq	Start Date	End Date	Grade	Change Reason	Source	Grade	Point	N
001	01/06/2010		GRADE 2A	POSTPL	POSTGD			

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

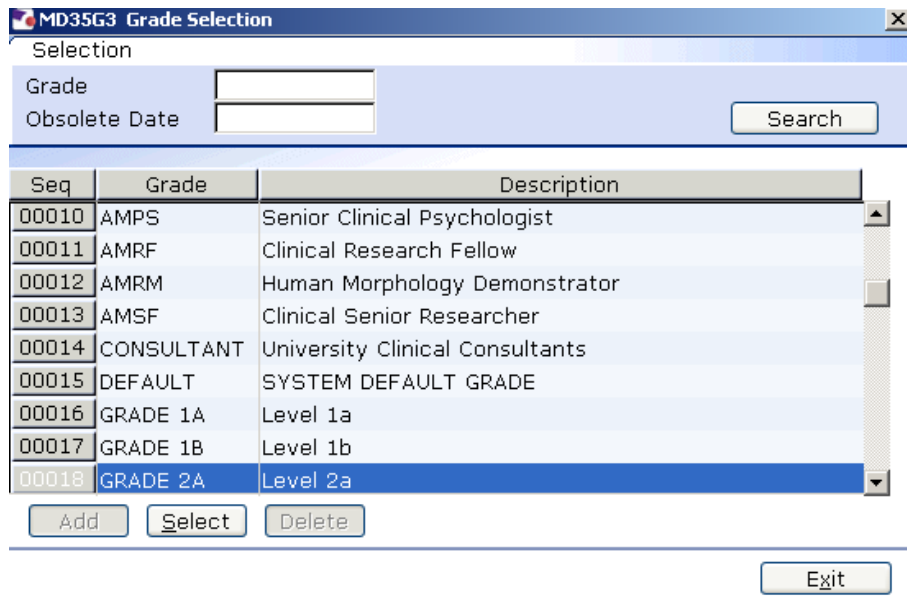
Add Change Delete Expand

Exit

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



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



MD35G3 Grade Selection

Selection

Grade

Obsolete Date

Seq	Grade	Description
00010	AMPS	Senior Clinical Psychologist
00011	AMRF	Clinical Research Fellow
00012	AMRM	Human Morphology Demonstrator
00013	AMSF	Clinical Senior Researcher
00014	CONSULTANT	University Clinical Consultants
00015	DEFAULT	SYSTEM DEFAULT GRADE
00016	GRADE 1A	Level 1a
00017	GRADE 1B	Level 1b
00018	GRADE 2A	Level 2a

9.41 Select the appropriate grade, then click on **Exit**.

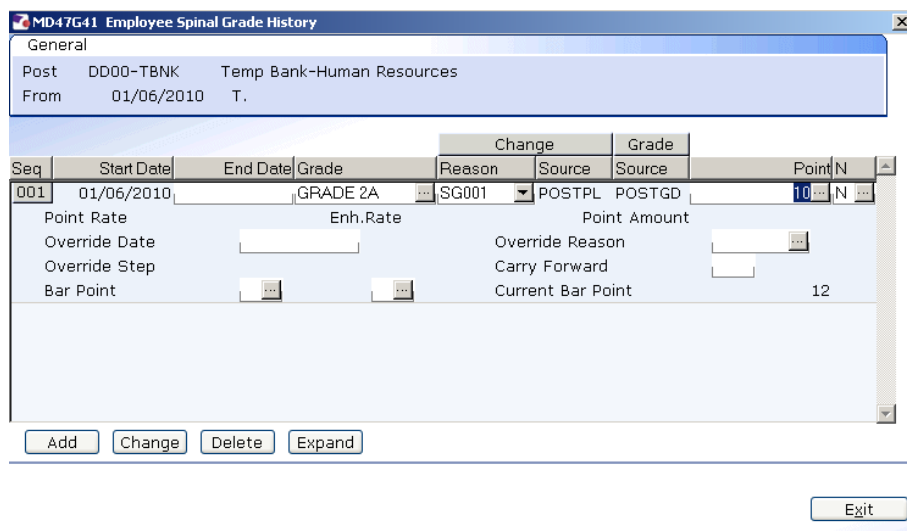
9.42 Press **ENTER** to move to the **Reason** field.

9.43 Use the drop-down menu in the **Reason** field and select the reason for the appointment.

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

9.44 Click on **Exit** then click on **Enter** to move to the **Point** field.

9.45 **Window in** to the **Point** field and select the salary point for this employee.



MD47G41 Employee Spinal Grade History

General

Post DD00-TBNK Temp Bank-Human Resources

From 01/06/2010 T.

Seq	Start Date	End Date	Grade	Change	Reason	Source	Source	Point	N
001	01/06/2010		GRADE 2A	...	SG001	POSTPL	POSTGD	10	N

Point Rate Enh.Rate Point Amount

Override Date  Override Reason

Override Step  Carry Forward

Bar Point  Current Bar Point 12

9.46 **ENTER** through the remaining fields.

9.47 Click on **Exit**.

9.48 Click on the **Contract** tab.

You can ignore the **Redeployment Reason** and **Contract Number** fields as these are not relevant to Temp Bank.

9.49 If you have an end date for this particular temp / student bank assignment then you can enter this in the **Projected End Date** field.

9.50 Type **A** into the **HESA Indicator** field (this stands for Atypical and is used in the University's annual HESA return).

9.51 Next, click on the **User Fields** button at the bottom of the window.

Not all of the lines are relevant to temp / student bank.

- 9.52 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.
- 9.53 Use the scroll arrow on the left-hand side of the window to move down to the next information lines.
- 9.54 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.
- 9.55 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.
- 9.56 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.)
- 9.57 Click on to close the **User Fields** screen.
- 9.58 Click on again to return to the **Current Post Holding** screen.
- 9.59 Move to the next data entry screen.

### 10.1 Window-in to the Post field.

10.2 Select the relevant post from the list and click on Select.


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- [illegible]

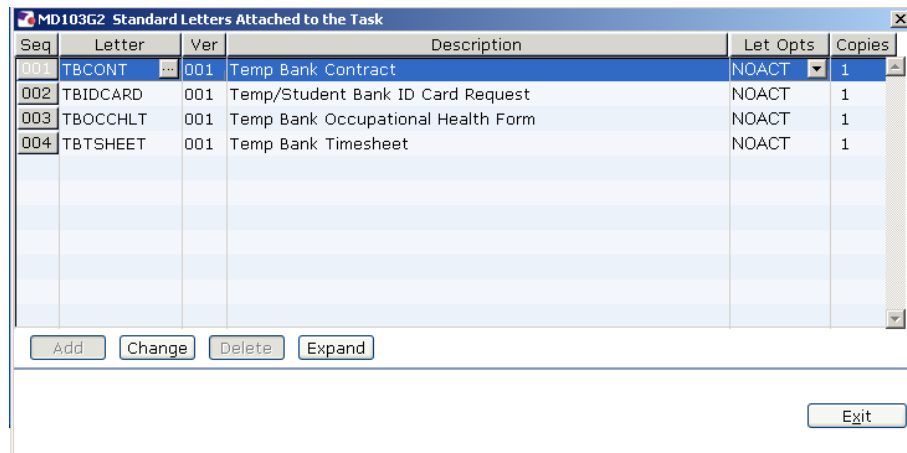
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- 10.10 In the **Er's %** column, enter the percentage that the temp / student worker will be paid from this cost centre (e.g. 100%).
- 10.11 Click on Exit to return to the **Post Holding Costing** screen.



- 10.12 You have now finished the task; click on  to save the changes.
- 10.13 If asked if you want to save Click on **Yes**.

## 11 Standard letters



Seq	Letter	Ver	Description	Let Opts	Copies
001	TBCONT	001	Temp Bank Contract	NOACT	1
002	TBIDCARD	001	Temp/Student Bank ID Card Request	NOACT	1
003	TBOCCHLT	001	Temp Bank Occupational Health Form	NOACT	1
004	TBTSHEET	001	Temp Bank Timesheet	NOACT	1

Buttons: Add, Change, Delete, Expand, Exit

- 11.1 Click in the **Let Opts** field of the standard letter(s) you wish to produce and use the drop down menu to select **MERGE**.
- 11.2 Click on **Exit**.
  - ① A number of screens will appear confirming the post details that have been entered. You will need to **Select** or **Exit** as appropriate through these fields.
- 11.3 The New Starter's letter should generate in **Word** and you can print as normal.