

This work instruction was last updated: 18 November 2010

Temp Bank - Visitor to Temp/Fees Post

This work instruction describes how to change a current Visitor with a future end date to include a Temp Bank or Fees post.

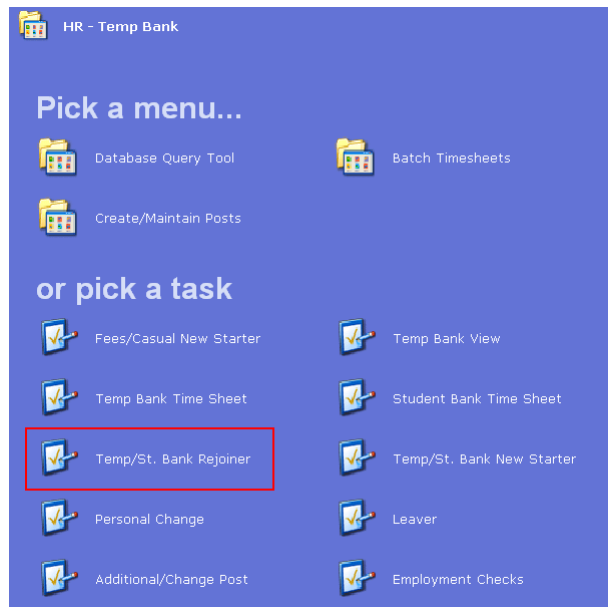
With all of the data entry screens it is important to press the **ENTER** key to move between fields and until all of the fields have been accessed, whether you need to enter data into them or not.

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1 Rejoinder Task

1.1 From HR – Temp Bank menu, select Temp/St. Bank Rejoinder



1.2 The following search form is made available

1.3 The Employee Number, Surname, search and select options are highlighted

1.4 Enter either the Employee Number or Surname and select search.

1.5 Select the appropriate staff member from the list.

2 Employment Details Screen

2.1 Move directly to the **Employment Details** screen:

Task - Temp/St. Bank Rejoiner - Employment Detail

Session Edit View Other Process Tools Display Help

Employee

Dates

Original Start	01/07/2007	SG001	New Appointment
Current Start	12/07/2010	SG004	Rejoiner to University
Termination	31/01/2011	LG036	End of Visitor status
To Staff			
Probation			

Additional

Service 3 Years 1 Month 20 Days

Employee Type

Self Service Unit

Willing to Job Share

Notice Period

No Of Current Posts 1

TUPE N

Service Breaks User Fields Notes Empl. History

Enter the employee's Original Start Date

2.2 Remove the **Termination** date and reason from the Termination field

2.3 **ENTER** through all fields to refresh the page.

Task - Temp/St. Bank Rejoiner - Employment Detail

Session Edit View Other Process Tools Display Help

Employee

Dates

Original Start	01/07/2007	SG001	New Appointment
Current Start	12/07/2010	SG004	Rejoiner to University
Termination			
To Staff			
Probation			

Additional

Service 2 Years 11 Months

Employee Type

Self Service Unit

Willing to Job Share

Notice Period

No Of Current Posts 1

TUPE N

Service Breaks User Fields Notes Empl. History

Enter the employee's Original Start Date

3 Basic Pay Detail Screen

Task - Temp/St. Bank Rejoiner - Basic Pay Detail

Session Edit View Other Process Tools Display Help

Employee

Pay Control

Pay Group SubPayroll PSUB5 Unpaid
Ctrl group Payroll PAYROLL3 (Unpaid)
Pay Type M Monthly
Pay Method BACS BACS
Cheque Pay

Other

Last Paid Year 2009
Period 10
Date 29/01/2010
Suspended Flag N Backdate NI ☐
Industrial Action N
Starter Flag ☐

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

Press WINDOW to select the structure unit the employee belongs to

3.1 Window in to the **Pay Group** field and select **PSUB3**

MD45G3 Structure Unit Group selection

Seq	Structure	Description	Level
001	PKGRDD0210	Reward	SubPayroll
002	PSUB1	Staff	SubPayroll
003	PSUB2	Pensioners	SubPayroll
004	PSUB3	Fees/Casual	SubPayroll
005	PSUB4	Teachers	SubPayroll
006	PSUB5	Unpaid	SubPayroll
007	PAYROLL1	(Main Payroll)	Payroll
008	PAYROLL2	(Teachers Payroll)	Payroll
009	PAYROLL3	(Unpaid)	Payroll

Add Select Delete Expand

Exit

3.2 Press **ENTER** and click **Exit** on the following screen

Task - Temp/St. Bank Rejoiner - Basic Pay Detail

Session Edit View Help

Employee

Pay Control

Pay Group SubPayroll PSUB3 Unpaid
Ctrl group Payroll PAYROLL3 (Unpaid)
Pay Type M Monthly
Pay Method BACS BACS
Cheque Pay

Other

Last Paid Year 2008
Period 10
Date 29
Suspended Flag
Industrial Action
Starter Flag

MD49G14 - Actual Last Paid Details

General

Actual Last Paid Year 2008
Actual Last Paid Period 10
Actual Last Paid Supplement No 0

Exit

P.Grp History Pay Currency Notes

Actual Year last Payment was made

3.3 Now enter the start date of the new fees post in the **Effective Date** field

Task - Temp/St. Bank Rejoiner - Basic Pay Detail

Session Edit View Help

Employee

Pay Control

Pay Group SubPayroll PSUB3 Fees/Casual
Ctrl group Payroll PAYROLL1 (Unpaid)
Pay Type M Monthly
Pay Method BACS BACS
Cheque Pay

Other

Last Paid Year 2009
Period 10
Date 29
Suspended Flag N
Industrial Action N
Starter Flag

MD49L82 - Pay Group Effective Date

General

Effective Date

Exit

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

Enter effective date of Pay Group change

- 3.4 You will now need to check for an **end date** against the current PSUB entry. Click on **P.Grp History**.

Task - Temp/St. Bank Rejoiner - Basic Pay Detail

Session Edit View Other Process Tools Display Help

Employee

Pay Control

Pay Group SubPayroll PSUB3 Fees/Casual

Ctrl group Payroll PAYROLL1 (Main Payroll)

Pay Type M Monthly

Pay Method BACS BACS

Cheque Pay

Other

Last Paid Year 2009

Period 10

Date 29/01/2010

Suspended Flag N Backdate NI

Industrial Action N

Starter Flag

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

Pay Currency Notes

Enter a pay method or press WINDOW to select (PAYMTD)

- 3.5 The following window appears, click on the **Expand** button

MD49L80 - Pay Group History

Seq	Started	Control Group	Control Group Id	Pay Group	Pay Group Id	Pay Type
001	01/09/2010	Payroll	PAYROLL1	SubPayroll	PSUB3	Monthly
002	12/07/2010	Payroll	PAYROLL3	SubPayroll	PSUB5	Monthly
003	01/07/2007	Payroll	PAYROLL1	SubPayroll	PSUB1	Monthly

Add Change Delete Expand Exit

3.6 Check against the top line for any end date. If this is present, you will need to contact **ServiceLine** and ask for the following:

- The End date against the PSUB3 record to be removed completely
- The End date against the PSUB5 record to be changed to the day before the start of the PSUB3 record (e.g in the example below it would be 31/08/2010)

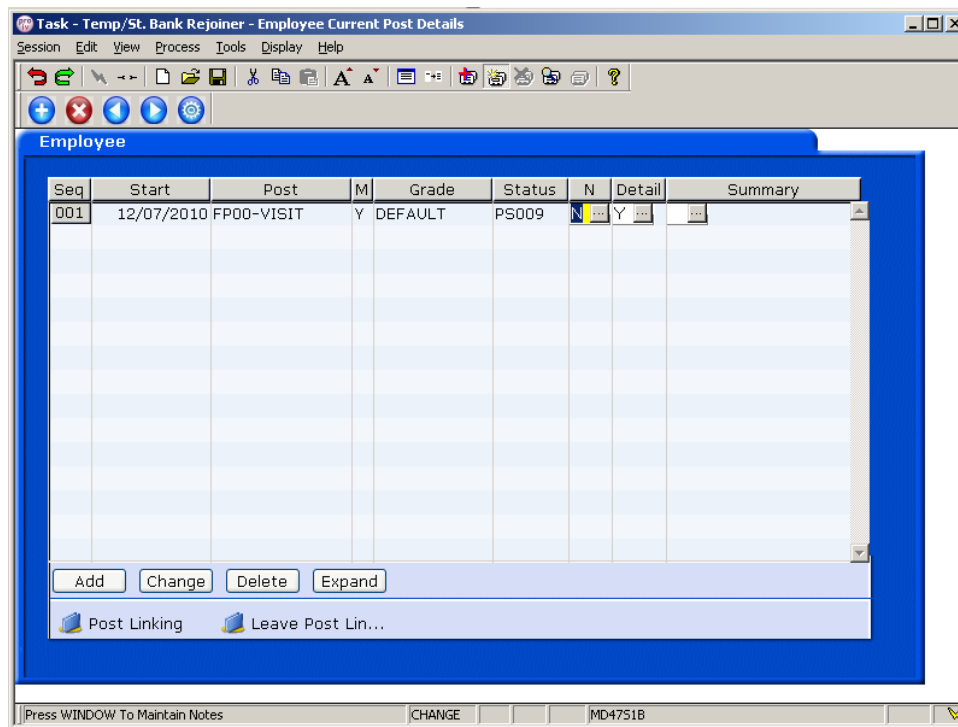


Seq	Started	Control Group	Control Group Id	Pay Group	Pay Group Id	Pay Type
001	01/09/2010	Payroll	PAYROLL1	SubPayroll	PSUB3	Monthly
		Control Group	(Main Payroll)			
		Pay Group	Fees/Casual			
		End Date	31/10/2010			
002	12/07/2010	Payroll	PAYROLL3	SubPayroll	PSUB5	Monthly
		Control Group	(Unpaid)			
		Pay Group	Unpaid			
		End Date	31/10/2010			
003	01/07/2007	Payroll	PAYROLL1	SubPayroll	PSUB1	Monthly
		Control Group	(Main Payroll)			
		Pay Group	Staff			
		End Date	31/01/2010			

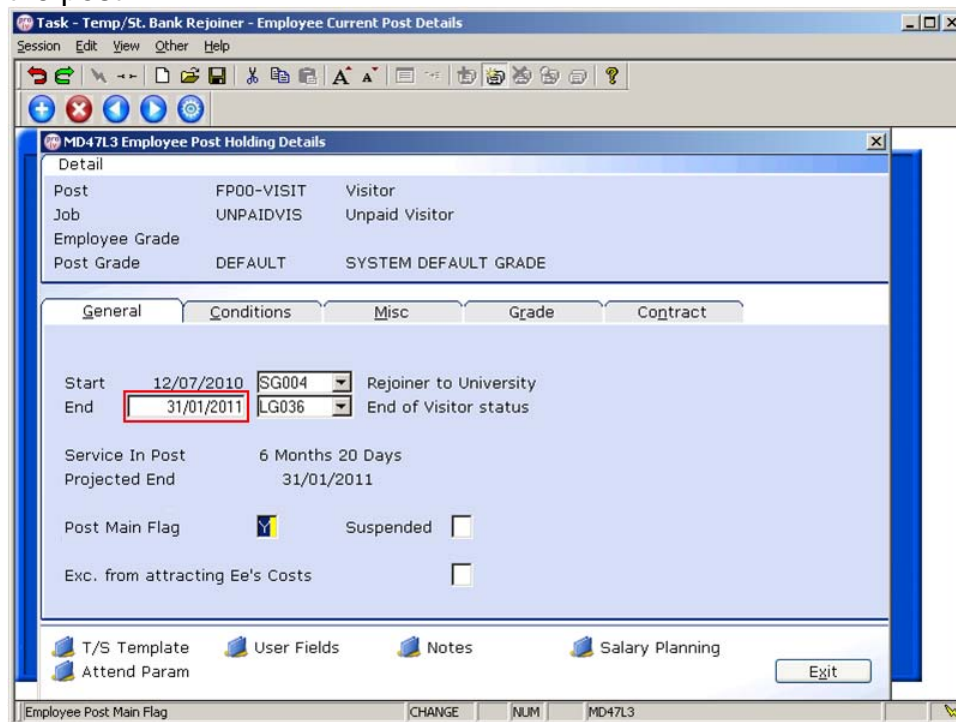
Buttons: Add, Change, Delete, Expand, Exit

3.7 **Exit** from the window

4 Employee Current Post Holding



4.1 Window in to the **Detail** field of the **Visitor post**, take note of the **end date** of the post.



4.2 Click on **Exit**

4.3 You will now need to add the new Temp Bank or Fees post, with an end date that matches the future end date shown in the visitor post.

4.4 Click on **Add** to enter the new post on Current Post Holding data for the employee

4.5 Type in the **Start Date** of the Fees/Temp bank post.

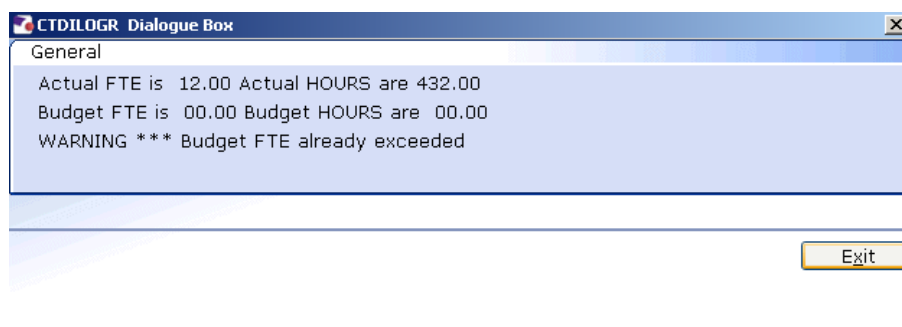
4.6 Press **ENTER**.

4.7 In the **Post** field, type in the correct Fees or TempBank 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).

4.8 Press **ENTER**.

❗ If you see a dialog box warning that the FTE is being exceeded click on **Exit**.



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

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

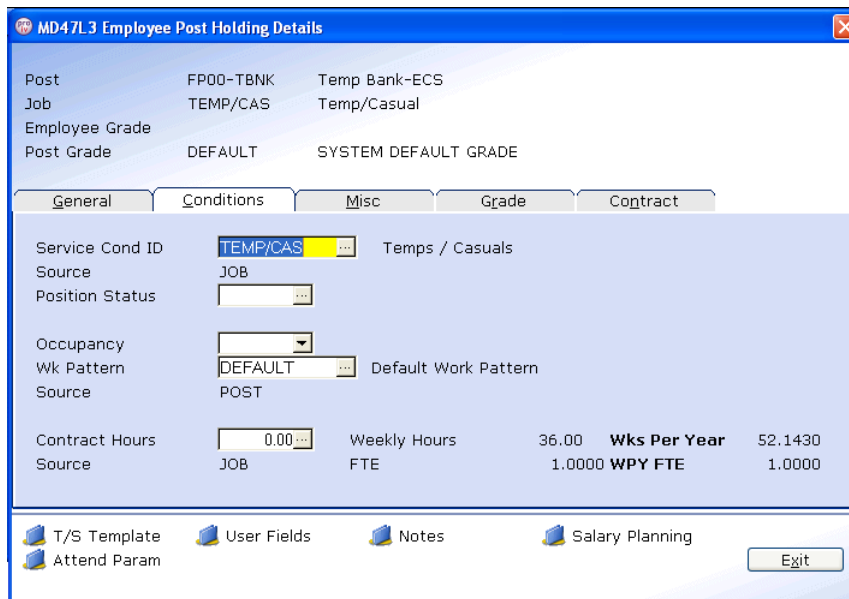
Seq	Code	Description	Score
025	PJL022	Fees/Casual to Visitor	
026	PJL023	Temporary to FTC	
027	PJL024	Transfer to Pensioner	
028	SG001	New Appointment	
029	SG002	New Appointment After Retiring	
030	SG003	Visitor Appointment	
031	SG004	Rejoiner to University	
032	SG005	Additional Post	
033	SG007	Extension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

- 4.11 Select the appropriate reason for this New Starter.

- You will have to enter the Reason again in a later field – you must be consistent and use the same reason each time.

- 4.12 Leave the **Post Main Flag** field blank

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



MD47L3 Employee Post Holding Details

Post: FP00-TBNK Temp Bank-ECS
 Job: TEMP/CAS Temp/Casual
 Employee Grade: DEFAULT SYSTEM DEFAULT GRADE

General Conditions Misc Grade Contract

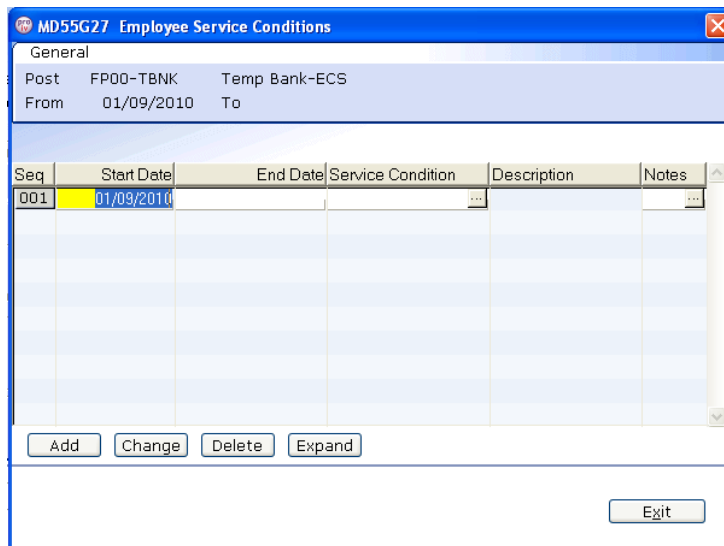
Service Cond ID: TEMP/CAS Temps / Casuals
 Source: JOB
 Position Status:
 Occupancy:
 Wk Pattern: DEFAULT Default Work Pattern
 Source: POST

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 User Fields Notes Salary Planning
 Attend Param

Exit

4.14 Window in to the Service Cond ID field



MD55G27 Employee Service Conditions

General

Post: FP00-TBNK Temp Bank-ECS
 From: 01/09/2010 To:

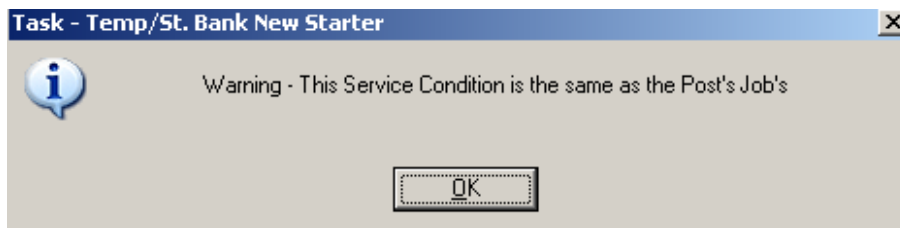
Seq	Start Date	End Date	Service Condition	Description	Notes
001	01/09/2010				

Add Change Delete Expand

Exit

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

4.16 The following warning dialogue box will appear:



Task - Temp/St. Bank New Starter

Warning - This Service Condition is the same as the Post's Job's

OK

4.17 Click **OK**.

4.18 Click **Exit**.

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

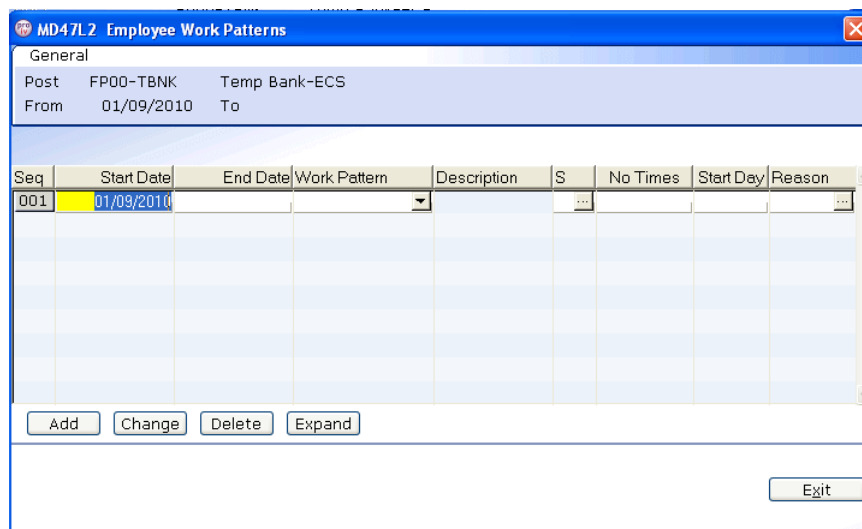
4.20 Click on **Add**.

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

4.22 From the drop down list select **PS007 (TBANK)** for a temp bank worker or **PS018 (STDBANK)** for a student bank worker or **PS008** for a Fees worker.

4.23 Press **Enter** to move through the remaining fields and click **Exit**.

4.24 **Window in to the Wk Pattern field.** The following screen will appear:



MD47L2 Employee Work Patterns

General

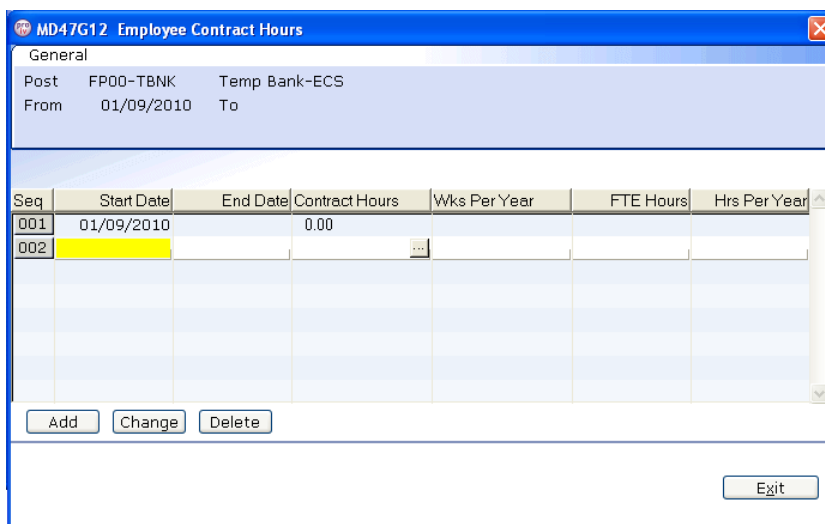
Post FP00-TBNK Temp Bank-ECS
From 01/09/2010 To

Seq	Start Date	End Date	Work Pattern	Description	S	No Times	Start Day	Reason
001	01/09/2010							

Add Change Delete Expand

Exit

- 4.25 Click on **Add** and enter through the fields until you get to **Start Day**.
- 4.26 Enter the digit "1" into the **Start Day** field.
- 4.27 Window in to the **Reason** field and select the reason for the appointment.
 - ☛ The reason MUST be the same as was entered previously
- 4.28 Window in to **Contract Hours** and enter through so that contract hours shows as **0.00**



MD47G12 Employee Contract Hours

General

Post FP00-TBNK Temp Bank-ECS
From 01/09/2010 To

Seq	Start Date	End Date	Contract Hours	Wks Per Year	FTE Hours	Hrs Per Year
001	01/09/2010		0.00			
002						

Add Change Delete

Exit

- 4.29 Press **ENTER** and **Exit**.
- 4.30 Click on to the **Misc** tab.

MD47L3 Employee Post Holding Details

Post: FP00-TBNK Temp Bank-ECS
 Job: TEMP/CAS Temp/Casual
 Employee Grade: DEFAULT
 Post Grade: SYSTEM DEFAULT GRADE

General Conditions Misc Grade Contract

Location: HIGHFIELD Highfield Campus, Southampton
 Source: POST

Average Pay: Average Hours:
 Auto Recalc AvP: ☐

T/S Template User Fields Notes Salary Planning
 Attend Param Exit

4.31 Window in to the **Location** field.

MD47L17 Employee Location

General

Post: FP00-TBNK Temp Bank-ECS
 From: 01/09/2010 To:

Seq	Start Date	End Date	Location	Description	Source	Reason	Notes
001	01/09/2010		HIGHFIELD				

Add Change Delete Expand Exit

4.32 Click on **Add** and press **Enter** twice.

4.33 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.

4.34 Press **Enter**.

4.35 **Window in** to the **Reason** field and select the reason for the appointment.

☛ The reason **MUST** be the same as was entered at instruction 4.11.

4.36 Press **Enter**.

4.37 Click **Exit**.

4.38 Click on the **Grade** tab.

MD47L3 Employee Post Holding Details

Post FP00-TBNK Temp Bank-ECS
Job TEMP/CAS Temp/Casual
Employee Grade
Post Grade DEFAULT SYSTEM DEFAULT GRADE

General Conditions Misc **Grade** Contract

Pay Grade **DEFAULT** SYSTEM DEFAULT GRADE
Source EMPPOST

Start Date 01/09/2010
End Date
Point
Point Amount
Point Rate

T/S Template Attend Param User Fields Notes Salary Planning Exit

i The **Pay Grade** field will default to **GRADE 1A** for student bank posts or **GRADE 2A** for temp bank posts or **DEFAULT** for FEES posts, however these grades can be amended if necessary.

4.39 Always Window in to the **Pay Grade** field.

MD47G41 Employee Spinal Grade History

General

Post FP00-TBNK Temp Bank-ECS
From 01/09/2010 T.

Seq	Start Date	End Date	Grade	Change Reason	Source	Grade Source	Point N
001	01/09/2010		GRADE 2A	POSTPL	PERGRD		12

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

Add Change Delete Expand Exit

4.40 Click on **Change**.

4.41 **ENTER** through to the **End Date** field (leave this blank).

4.42 If the default grade is correct for this Fees / temp / student bank worker then you can **ENTER** through the **Grade** field

i Fees posts will always have a grade of **Default**

4.43 If the default grade is not correct for this temp / student bank worker then **window in** to change the grade.

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

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

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

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

4.47 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.

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

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

Seq	Start Date	End Date	Grade	Reason	Source	Point N
001	01/09/2010	8.1465	GRADE 2A	P.JL021	POSTPL	7

4.50 **ENTER** through the remaining fields.

- 4.51 Click on **Exit**.
- 4.52 Click on the **Contract** tab.

MD47L3 Employee Post Holding Details

Post	FP00-TBNK	Temp Bank-ECS
Job	TEMP/CAS	Temp/Casual
Employee Grade		
Post Grade	DEFAULT	SYSTEM DEFAULT GRADE

General Conditions Misc Grade Contract

Redeployment Reason

Projected End Date

Contract Number

HESA Indicator ☐

T/S Template User Fields Notes Salary Planning

Exit

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

- 4.53 If you have an end date for this particular temp / student bank assignment then you can enter this in the **Projected End Date** field.
- 4.54 Type **A** into the **HESA Indicator** field (this stands for Atypical and is used in the University's annual HESA return).
- 4.55 Next, click on the **User Fields** button at the bottom of the window.

MD00G32 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

Exit

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

- 4.56 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.

- 4.57 Use the scroll arrow on the left-hand side of the window to move down to the next information lines.
- 4.58 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.
- 4.59 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.
- 4.60 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.)
- 4.61 Click on **Exit** to close the **User Fields** screen.
- 4.62 Now return to the **General** tab and enter the **End date** of the Visitor post you recorded previously in step 4.1. Use the reason code **LG036** from the drop down menu.

MD47L3 Employee Post Holding Details

Detail

Post	FP00-TBNK	Temp Bank-ECS
Job	TEMP/CAS	Temp/Casual
Employee Grade		
Post Grade	DEFAULT	SYSTEM DEFAULT GRADE

General Conditions Misc Grade Contract

Start 01/12/2010 SG004 Rejoiner to University

End 31/01/2011 LG036 End of Visitor status

Service In Post 2 Months

Projected End

Post Main Flag ☐ Suspended ☐

Exc. from attracting Ee's Costs ☐

T/S Template User Fields Notes Salary Planning

Exit

- 4.63 Click **Exit**.
- 4.64 To allow the Tempbank or Fees post to continue after the Visitor post has ended, you must now repeat steps **4.3 to 4.59** and add the same post again but with the following exceptions:
 - The **start date** of the same post will be the day after the previous post ends (eg 01/02/2011 in this example)
 - In step 4.11 enter **Y** in the **Post Main Flag** field

- 4.64.1 You should now find at three entries on the Employee Current Post screen, two relating to the new Temp Bank or Fees post followed by one for the Visitor post.

Task - Temp/St. Bank Rejoiner - Employee Current Post Details

Session Edit View Process Tools Display Help

Employee

Seq	Start	Post	M	Grade	Status	N	Detail	Summary
001	01/02/2011	FP00-TBNK	Y	DEFAULT	PS001	N	Y	...
002	01/09/2010	FP00-TBNK		DEFAULT		N	Y	
003	12/07/2010	FP00-VISIT	Y	DEFAULT	PS009	N	Y	

Add Change Delete Expand

Post Linking Leave Post Lin...

Pseudo-Sequence Number for Index Paging CHANGE NUM MD4751B

5 Post Holding Costing data entry screen

- 5.1 Window-in to the **Post** field. The screen will show both instances of the new Temp Bank or Fees posts, one with an end date and one without.

Seq	Post	Short Desc	Start Date	End Date	Type	Main Flag
001	FP00-TBNK	TEMPBANK	01/02/2011			
002	FP00-TBNK	TEMPBANK	01/09/2010	31/01/2011		
003	FP00-VISIT	VISITOR	12/07/2010	31/01/2011		Y

- 5.2 Select the post that has the End Date field populated, click **Select**
- 5.3 Press **Enter**.

- 5.4 Click on **Add**.
- 5.5 Enter the start date that the worker started in this assignment / post.
- 5.6 Enter the end date noted in step 4.2 in the **End Date** field
- 5.7 Press **Enter**

[illegible]

- 5.8 Enter the relevant cost centre code (this is now known as the Sub Project Code at the University).
- 5.9 In the **Ee's %** column, enter the percentage that the temp / student worker will be paid from this cost centre (e.g. 100%).

- 5.10 In the **Er's %** column, enter the percentage that the temp / student worker will be paid from this cost centre (e.g. 100%).
- 5.11 Click on Exit to return to the **Post Holding Costing** screen.
- 5.12 Use the back arrow to go to the **Post Holding History** screen, then use the forward arrow to return to the **Post Holding Costing** Screen again:



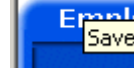
- 5.13 Window-in to the **Post field** again. The screen will show both instances of the new Temp Bank or Fees posts.

[illegible]

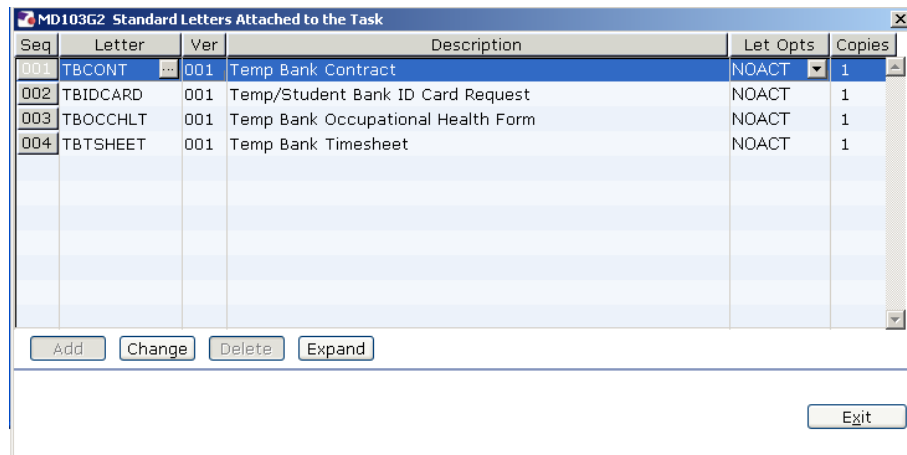
- 5.14 Now select the same post that **does not** have the **End Date** field populated, click **Select**
- 5.15 Press **Enter**.

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




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

6 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

- 6.1 Click in the **Let Opts** field of the standard letter(s) you wish to produce and use the drop down menu to select **MERGE**.
- 6.2 Click on **Exit**.
 -  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.
- 6.3 The New Starter's letter should generate in **Word** and you can print as normal.