

**This work instruction was last updated: 20<sup>th</sup> May 2010**

## **HR Temporary to Permanent Process**

This Work Instruction describes the process where an existing Fixed Term Contract member of staff becomes Permanent.

Follow the guidance below to enter the updated information on the employee record.

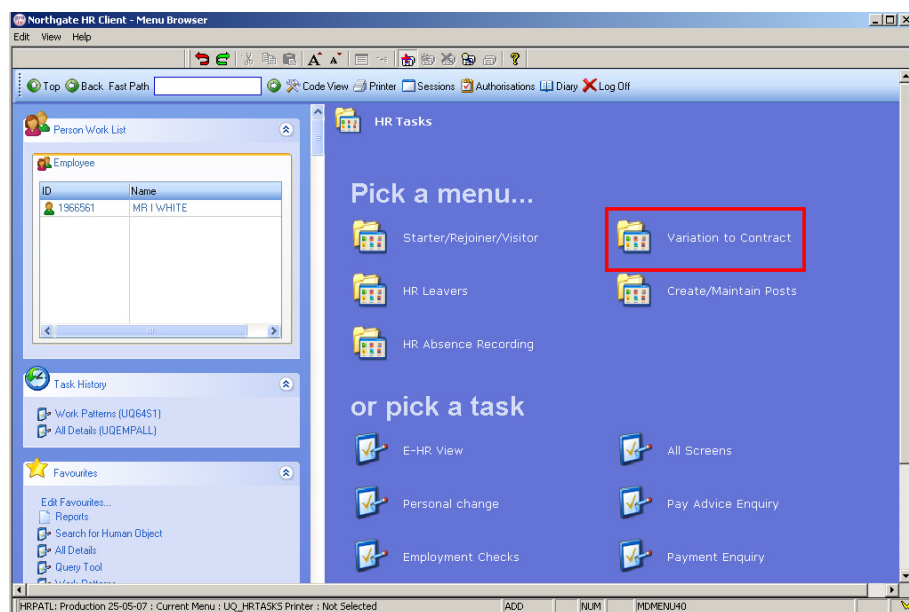
☛ Remember to remove the FTC flag from the Post.

### **Table of Contents**

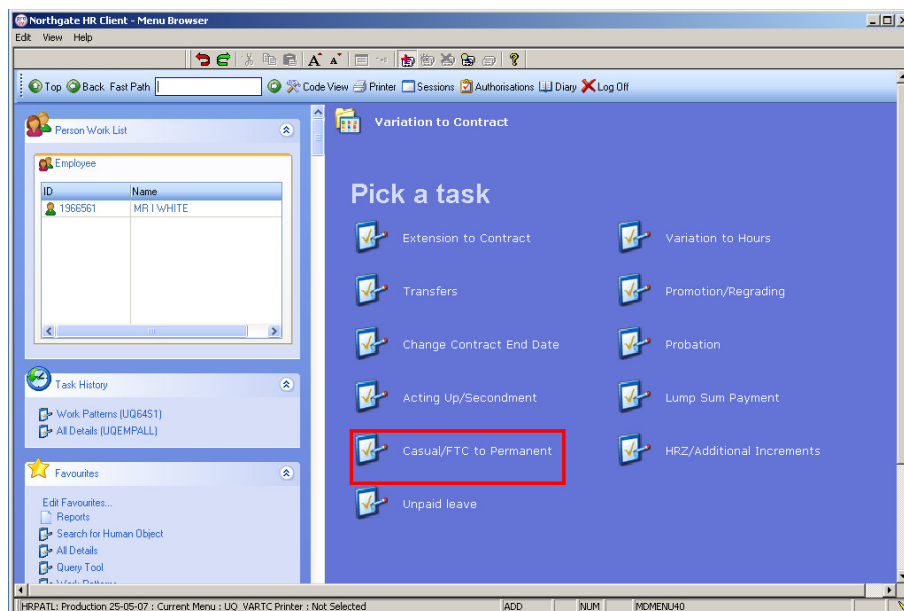
1	Entering a Temporary to Permanent onto ResourceLink
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# 1 Entering a Temporary to Permanent onto ResourceLink

## 1.1 HR Tasks - Variation to Contract



## 1.2 Variation to Contract - Casual / FTC to Permanent



## 1.3 The following search form is made available

Task - HRZ/Additional Increments - Employee Selection Screen

Employee | Other Numbers | Structure | Saved List | Employment

Match: ☐ Exact ☐ Partial

Employee Number:

Surname:  Initials:

Sex:  Nat. Ins. No.:

Current Employee:  Y As at Date: 24/03/2010

Previous Surname:

Known As:

Add Search

Surname	Inits	Title	Emp Number	National ID Number	Start Date	For

Select Exit Save List

Enter an Employee Number CHANGE NUM MD55S22

- 1.4 The Employee Number, Surname, search and select options are highlighted
- 1.5 Entering either the Employee Number or Surname select search.
- 1.6 Select the appropriate staff member from the list

## 2 Personal Details data entry screen

- 2.1 Use the **Personal Details** screen to check that you are working on the correct employee.

**Task - Casual/FTC to Permanent - Employee Personal Detail**

Session Edit View Other Process Tools Display Help

**Employee 2086506 : MS L LASTIC**

**Title Details**

Legislation Type

Surname

Title

First Forename

Other Forenames

Prev. Surname

Known As

Honours

Generation

**Personal Details**

Gender

Date of Birth  Age: 52 Years 6 Months

Nat. Ins. No.  Case Number

Home Address Cont. Addresses Passport/Visa Contact Tel

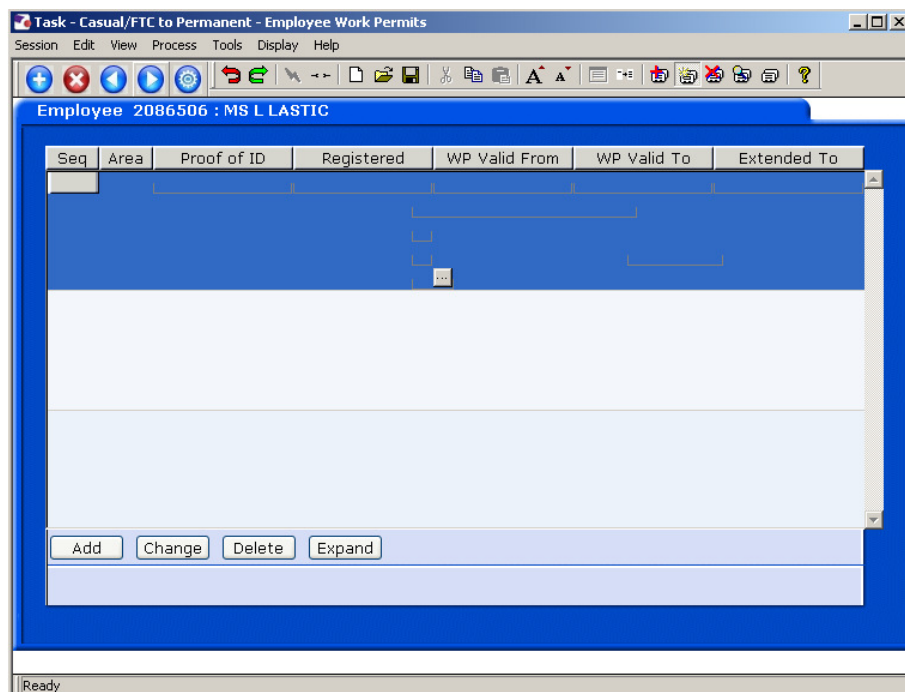
Email Address Marital Status User Fields Notes

Enter the person's Surname

- 2.2 Move to the next data entry screen

### 3 Employee Work Permit data entry screen

 There may already be work permit information for this employee.



3.1 Click on **Add** to enter new or updated Work Permit details for the employee.

 For full details about entering **Work Permits** and/or **VISA** information, please refer to the **New Starter** work instruction.

3.2 Move to the next data entry screen.

## 4 Contract Details data entry screen

Task - Casual/FTC to Permanent - Maintain Employee Contract Detail

Session Edit View Process Tools Display Help

Employee 2086506 : MS L LASTIC

General

Contract Type

Seq	Contract No	Start Date	End Date	Contract Type	Po...	UDFs	Notes
-----	-------------	------------	----------	---------------	-------	------	-------

4.1 Press **ENTER** to pass the **Contract Type** field.

Task - Casual/FTC to Permanent - Maintain Employee Contract Detail

Session Edit View Process Tools Display Help

Employee 2086506 : MS L LASTIC

General

Contract Type

Seq	Contract No	Start Date	End Date	Contract Type	Po...	UDFs	Notes
001	01013998	01/04/2010		FTC01A	N	N	N


Add Change Delete

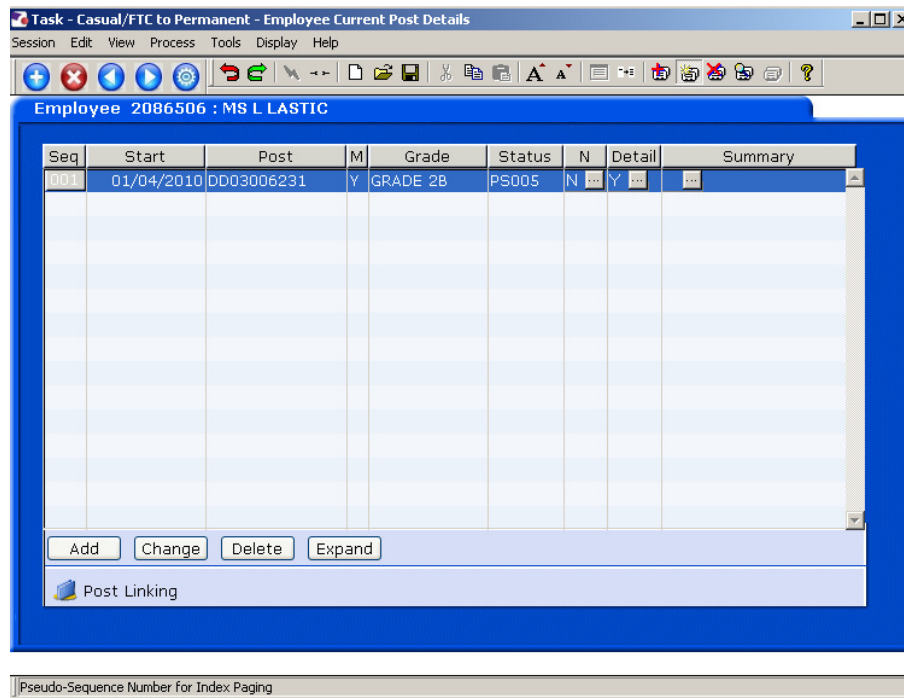
Pseudo-Sequence Number for Index Paging

4.2 Although the employee is changing from an FTC to a permanent employee, leave the data as it is on this screen to keep a history.

4.3 Move to the next data entry screen.

## 5 Current Post Holding data entry screen

-  This screen will contain a row for each post this person is already attached to. To view information on their existing posts window into the **Summary** field on that row.



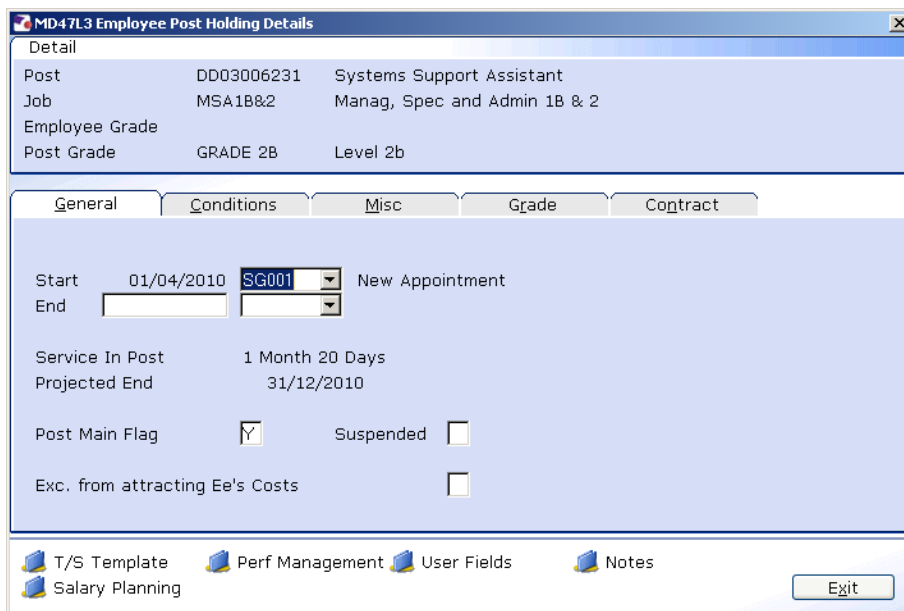
Seq	Start	Post	M	Grade	Status	N	Detail	Summary
001	01/04/2010	DD03006231	Y	GRADE 2B	PS005	N	Y	

Buttons: Add, Change, Delete, Expand

Post Linking

Pseudo-Sequence Number for Index Paging

- 5.1 Window into the **Detail** field on the post that is currently a FTC but is becoming permanent.



MD47L3 Employee Post Holding Details

Detail

Post DD03006231 Systems Support Assistant

Job MSA1B&2 Manag, Spec and Admin 1B & 2

Employee Grade GRADE 2B Level 2b

General Conditions Misc Grade Contract

Start 01/04/2010 SG001 New Appointment

End

Service In Post 1 Month 20 Days

Projected End 31/12/2010

Post Main Flag ☒ Suspended ☐

Exc. from attracting Ee's Costs ☐

T/S Template Perf Management User Fields Notes

Salary Planning

Exit

- 5.2 Click on the **Conditions** tab.

**MD47L3 Employee Post Holding Details**

Detail

Post	DD03006231	Systems Support Assistant
Job	MSA1B&2	Manag, Spec and Admin 1B & 2
Employee Grade		
Post Grade	GRADE 2B	Level 2b

General Conditions Misc Grade Contract

Service Cond ID: MSA1B&2 Management Specialist & Administrative 1

Source: EMPPOST

Position Status: PS005 Full Time - Fixed Term

Occupancy: [Dropdown]

Wk Pattern: 36AMTWTF SOM7.2T7.2W7.2T7.2F7.2S0

Source: EMPPOST

Contract Hours: 36.00 Weekly Hours: 36.00 00.0000

Source: CONTRACT FTE 1.0000

T/S Template Perf Management User Fields Notes

Salary Planning

Exit

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

**MD55G30 Employee Position Status**

General

Post: DD03006231 Systems Support Assistant

From: 01/04/2010 To:

Seq	Start Date	End Date	Position Status	Description	Notes
001	01/04/2010		PS005	FTFT	N

Add Change Delete Expand

Exit

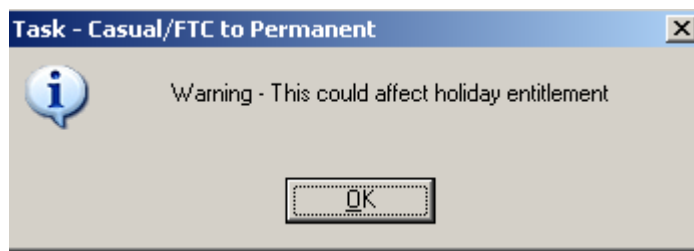
5.4 Click on **Change**.

5.5 In the **End Date** field enter the day before this post becomes permanent.

5.6 Press **Enter**.

5.7 Click on **Add**.





5.8 Click on **OK**.

5.9 Click on **Add**.

Seq	Start Date	End Date	Position Status	Description	Notes
001	01/04/2010	31/05/2010	PS005	FTFT	N
002					

Buttons: Add, Change, Delete, Expand, Exit

5.10 In the **Start Date** field enter the date the post becomes permanent.

5.11 Press **Enter**.

5.12 Leave the **End Date** field blank.

5.13 In the **Position Status** field, window in and select the new position status (PS001 or PS002 or PS003).

Seq	Start Date	End Date	Position Status	Description	Notes
001	01/04/2010	31/05/2010	PS005	FTFT	N
002	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

Buttons: Add, Change, Delete, Exp

5.14 Press **Enter**.

5.15 Click on **Exit**.



**MD47L3 Employee Post Holding Details**

<b>Detail</b>				
Post	DD03006231	Systems Support Assistant		
Job	MSA1B&2	Manag, Spec and Admin 1B & 2		
Employee Grade				
Post Grade	GRADE 2B	Level 2b		

General Conditions Misc Grade Contract

Service Cond ID	MSA1B&2	Management Specialist & Administrative 1		
Source	EMPPPOST			
Position Status	PS005	Full Time - Fixed Term		
Occupancy				
Wk Pattern	36AMTWTF	SOM7.2T7.2W7.2T7.2F7.2S0		
Source	EMPPPOST			
Contract Hours	36.00	Weekly Hours	36.00	00.0000
Source	CONTRACT	FTE	1.0000	

T/S Template Perf Management User Fields Notes  
Salary Planning

Exit

5.16 If the employee's Work Pattern and Contract Hours are remaining the same, click on the **Contract** tab.

**MD47L3 Employee Post Holding Details**

<b>Detail</b>				
Post	DD03006231	Systems Support Assistant		
Job	MSA1B&2	Manag, Spec and Admin 1B & 2		
Employee Grade				
Post Grade	GRADE 2B	Level 2b		

General Conditions Misc Grade Contract

Redeployment Reason				
Projected End Date	31/12/2010			
Contract Number	01013998	Fixed Term Contract - 1st Ext - Post A		
HESA Indicator	<input checked="" type="checkbox"/>			

T/S Template Perf Management User Fields Notes  
Salary Planning

Exit

5.17 Click in the **Projected End Date** field and **delete** the date so that the field is now empty.

- ☛ Now that the person is a permanent employee it is important that you clear this field, as otherwise they will continue to be included in FTC reports.

5.18 Press **Enter**.

5.19 In the **Contract Number** field, delete the contract number so that the field is now empty.

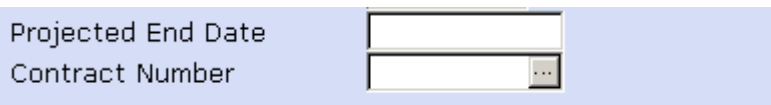
5.20 Press **Enter**.

5.21 Note that the text next to the **Contract Number** field may not disappear.



Projected End Date	<input type="text"/>	Fixed Term Contract - 1st Ext - Post A
Contract Number	<input type="text"/>	

5.22 However when you exit the screen, the next time you return the text will have gone.




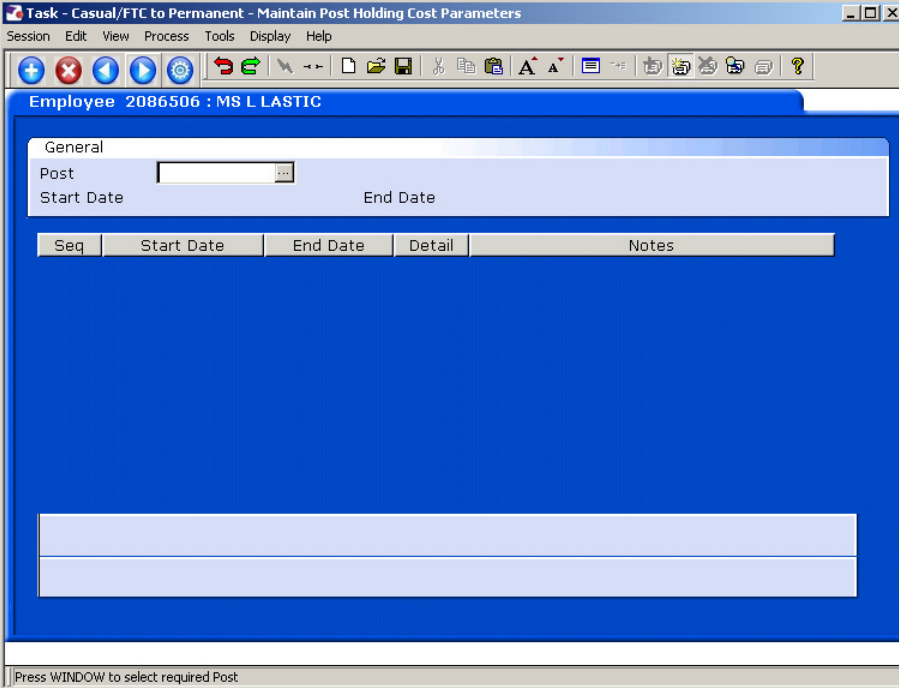
Projected End Date	<input type="text"/>
Contract Number	<input type="text"/>

5.23 Click on **Exit**.

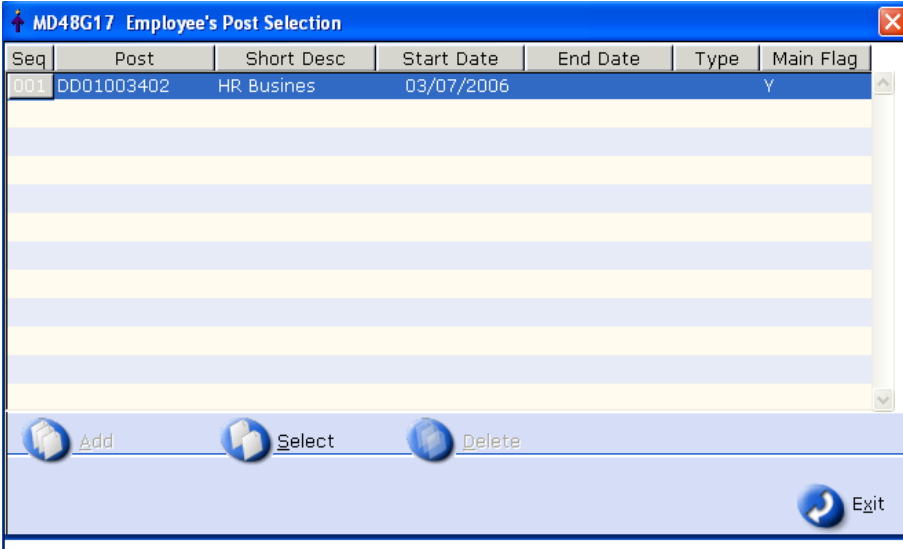
5.24 Move to the next data entry screen.

## 6 Post Holding Costing data entry screen

-  You will only complete this screen if the Post Holding Costing information already contained has changed.



### 6.1 Window into the **Post** field.



Seq	Post	Short Desc	Start Date	End Date	Type	Main Flag
001	DD01003402	HR Busines	03/07/2006			Y

### 6.2 Click on the post.

Task - Casual/FTC to Permanent - Maintain Post Holding Cost Parameters

Session Edit View Process Tools Display Help

Employee 2086506 : MS L LASTIC

General

Post DD03006231

Start Date End Date

Seq	Start Date	End Date	Detail	Notes
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6.3 Press **Enter**.

Task - Casual/FTC to Permanent - Maintain Post Holding Cost Parameters

Session Edit View Process Tools Display Help

Employee 2086506 : MS L LASTIC

General

Post DD03006231 Systems Support Assistant

Start Date 01/04/2010 End Date

Seq	Start Date	End Date	Detail	Notes
001	01/04/2010		Y	N

Add Change Delete

Pseudo-Sequence Number for Index Paging

6.4 In the **End Date** field enter the date of the day before the change to Post Holding Costing is set to take place.

6.5 Click on **Add**


6.6 In the **Start Date** field enter the date of when the change to Post Holding Costing is set to commence.

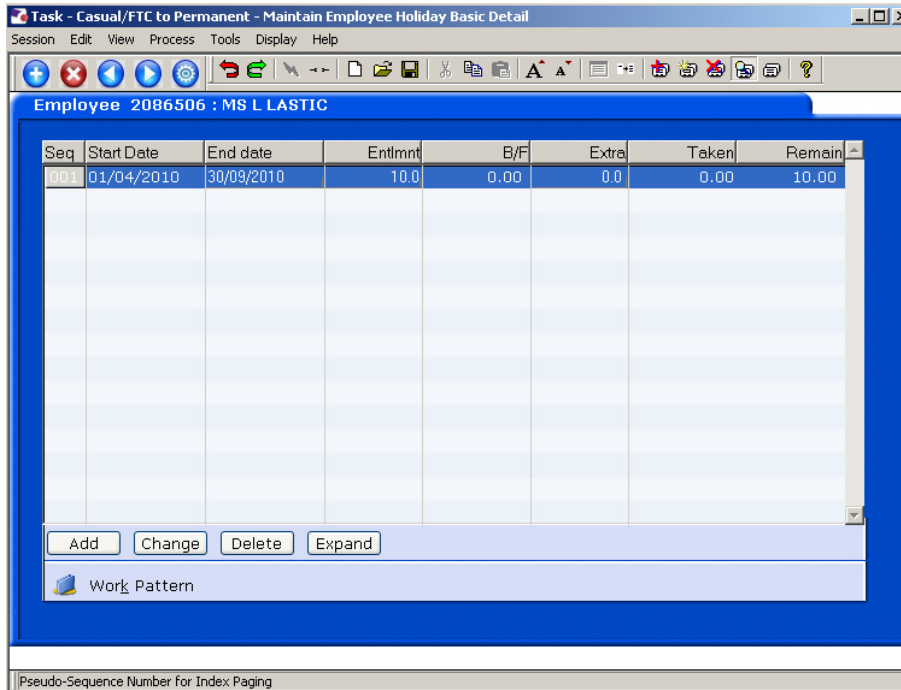
6.7 Press **Enter**.

6.8 Leave the **End Date** field blank, **Enter** through.

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## 7 Holiday Entitlement data entry screen

-  If the Holiday Entitlement for the current leave year ends on the end date of their original FTC date, this will need to be extended to the end of the current leave year.



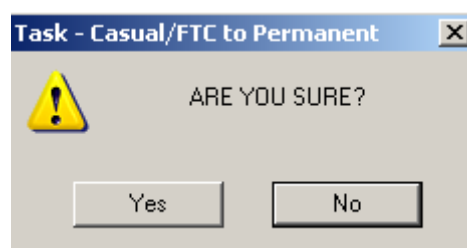
Seq	Start Date	End date	Entlmt	B/F	Extra	Taken	Remain
001	01/04/2010	30/09/2010	10.0	0.00	0.0	0.00	10.00

Buttons: Add, Change, Delete, Expand

Work Pattern

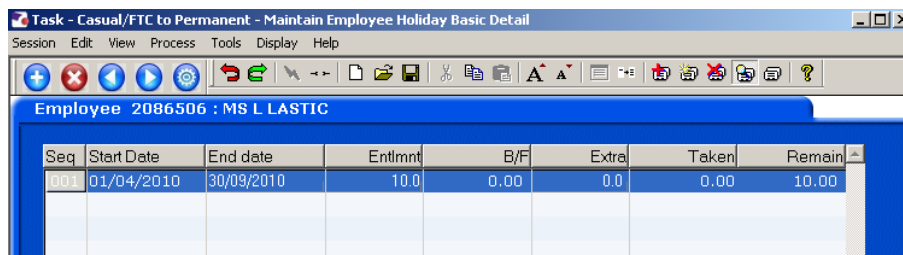
Pseudo-Sequence Number for Index Paging

- 7.1 Make a note of the **Start Date**, **Entitlement**, **Extra** and **Taken** fields.
- 7.2 **Delete** the current holiday entitlement row. You do not need to amend previous leave entitlement rows.



- 7.3 Click on **Yes**.
- 7.4 Click on **Add**.
- 7.5 Enter the **Start Date**
- 7.6 Press **Enter**.
- 7.7 In the **End Date** field, enter the end date of the current holiday year (30<sup>th</sup> September).

- 7.8 Press **Enter**.
- 7.9 The **Entlmnt** field will auto calculate the new holiday entitlement until the end of the current holiday year.
- 7.10 Press **Enter**.
- 7.11 If there was any information in the **Extra** field before you deleted the row, re-enter that figure again in the **Extra** field.
- 7.12 The **Remain** field will calculate how much entitlement is remaining.



Seq	Start Date	End date	Entlmnt	B/F	Extra	Taken	Remain
001	01/04/2010	30/09/2010	10.0	0.00	0.0	0.00	10.00

- 7.13 This is the final screen in this task.

- 7.14 Click on **Save**. 

## 8 Standard Letters

Seq	Letter	Ver	Description	Let Opts	Copies
001	4+ACAD	001	Level 4+ academic contract	NOACT	1
002	4+NON-AC	001	Level 4+ non-academic	NOACT	1
003	CLINAC	001	Clinical Academic/Clinical Research	NOACT	1
004	CLINPROF	001	Clinical Consultant	NOACT	1
005	LEV 1-3	001	Levels 1 - 3	NOACT	1
006	SECURITY	001	Security		
007	TTP	001	Temporary to Permanent		

Code	Desc	Long Description
MERGE	Manual	Immediate print with manual changes
NOACT	No Request	No action to be taken (no request)
PRINT	Print	Immediate request and print
PROMPT	Prompt	Prompt on commit for user action
QUEUE	Request	Request letter only
SAVE	Save	Save the merged letter

Buttons: Add, Change, Delete, Expand, Exit

- 8.1 Click in the **Let Opts** field of the standard letter you want to produce
- 8.2 Click on the drop down and select **MERGE – Immediate print with manual changes**.
- 8.3 Click on **Exit**. A series of pop-up windows will appear, where you will need to select on the relevant information that should be pulled through to the contract.

Seq	Post	Start Date	End Date	Occ Type	Main
001	EMPLOYEE	10/04/2010			
002					
003					
004					
005					
006					
007					
008					
009					

Buttons: Add, Select, Delete, Exit

- 8.4 Click on the line that has Pay Element **"1000"** (Basic Pay) and click on **Select**.
- 8.5 If you are asked to select a version of the HR Main hierarchy always, select the most recent version.
- 8.6 If the person has more than one post, ensure that you select the correct post relevant to this contract.

- 8.7 If (as shown above) any of the pop-up windows only have one row of data, simply click on **Select**.

- 8.8 If (as shown above) any of the pop-up windows do not show any rows of data, simply click on **Exit**.

- 8.9 Once you have progressed through all of the pop-up windows, the employee's letter should generate in **Word** at which point you will be able to check and amend it (if necessary).


- ✱ Please ensure you delete the highlighted sections in the contract where appropriate to the individual employee.

- Please only click on the Print button if you have one of the appropriate HR printers set as your default printer:

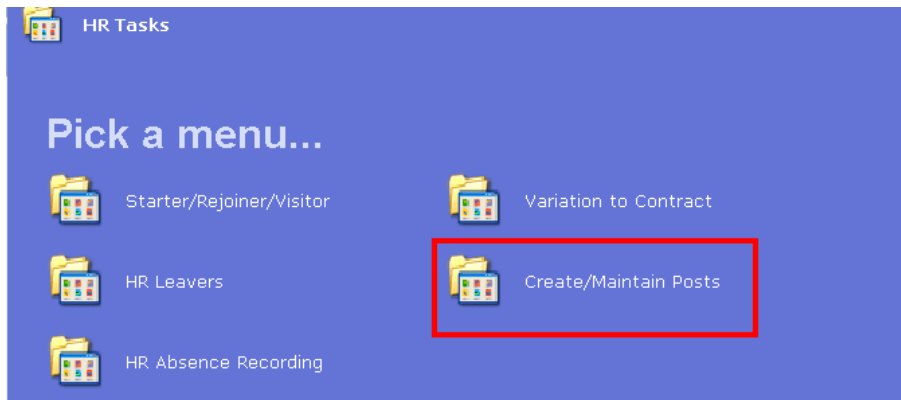
**Attempting to print a standard letter (contract) on any other printer will not only result in failure, but will also cause problems for other users.**

## 9 Removing the FTC flag from the post.

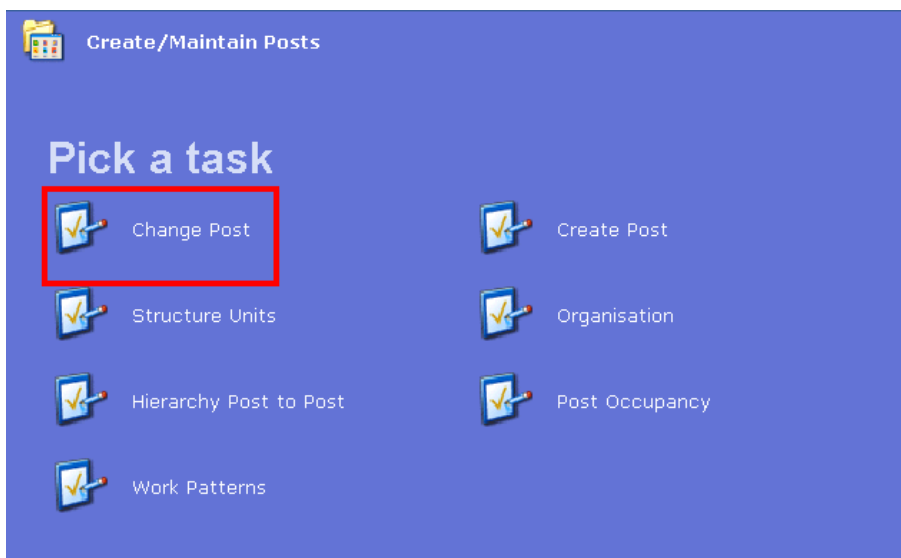
9.1 Return to the **ResourceLink** menu.

9.2 Click on **Top** .

9.3 Click on Create/Maintain Posts



9.4 Click on Change Post



9.5 Enter the **Post ID** of the person that is changing from Fixed Term to Permanent.

9.6

Click on  User Fields



### User Fields

[illegible]

**Task - Change Post - Maintain Post Details**

Session Edit View Other Process Display Help

Post DD03006231 : Systems Support Assistant

**General**

Job Number MSA1B&2 Manag, Spec and Admin 1B & 2

Post DD03006231 Desc N

Short Desc SYS SUPP

Long Description Systems Support Assistant

Freeze Start Date Freeze End Date

Grade GRADE 2B Level 2b

Current Location HIGHFIELD Highfield Campus, Southampton

Work Pattern 36AMTWTF S0M7.2T7.2W7.2T7.2F7.2S0

**Add. Info**

Post Class PC011 Administrative/Support

Start Date 01/09/2008 Obsolete Date

Grade Usage Level 0 Pensionable Flag

Freeze Recruitment Hierarchy View

Fte Establishment Location Grade

More Dets User Fields Notes Roles

Enter Job Number or press WINDOW to select

Field Label	Field Contents	Description
Cost Type - Payroll	1310	Management, Specialis
Fixed Term Contract	Y	
UCEA Responsibility		
UCEA Job Function		

Cost Type - Payroll 1310  
Management, Specialist & Admin

Exit

9.7 Click on the **Fixed Term Con** field.

Fixed Term Contract Y

9.8 Delete the **Y** flag from this field.

9.9 Press **Enter** and click on **Exit**.

9.10 Click on **Save**.

