

This work instruction was last updated: 24th May 2010

HR Transfer Process

This Work Instruction describes the process where an existing employee is transferring from one post to a different one. This can be a transfer to a new post within the same School/Dept or transferring to a new post in a different School/Dept.

Also use this task for entering Secondments.

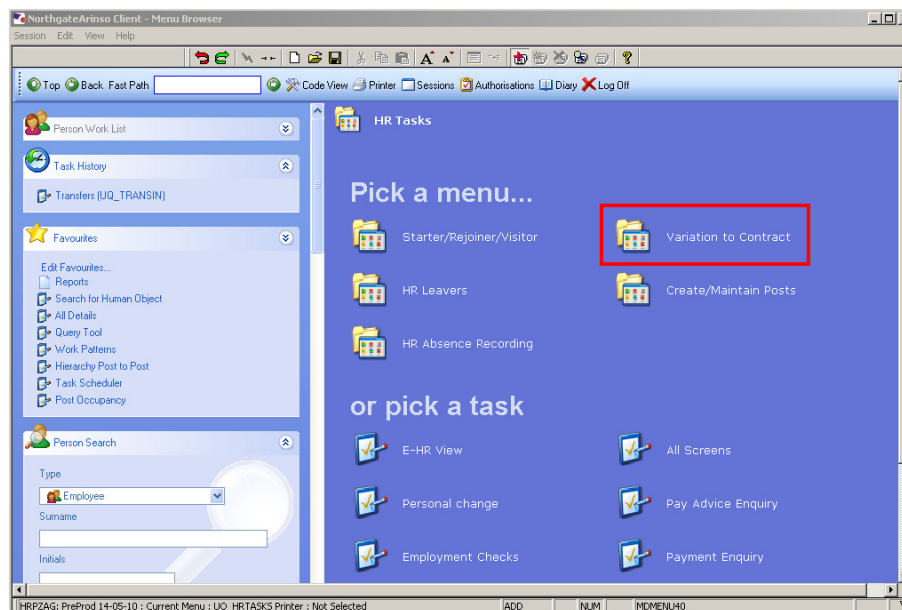
- If you have an employee who is moving from Fees/Casual to the Main Payroll Staff **DO NOT** use this work instruction, but instead refer to the **Casual to FTC/Permanent** work instruction.

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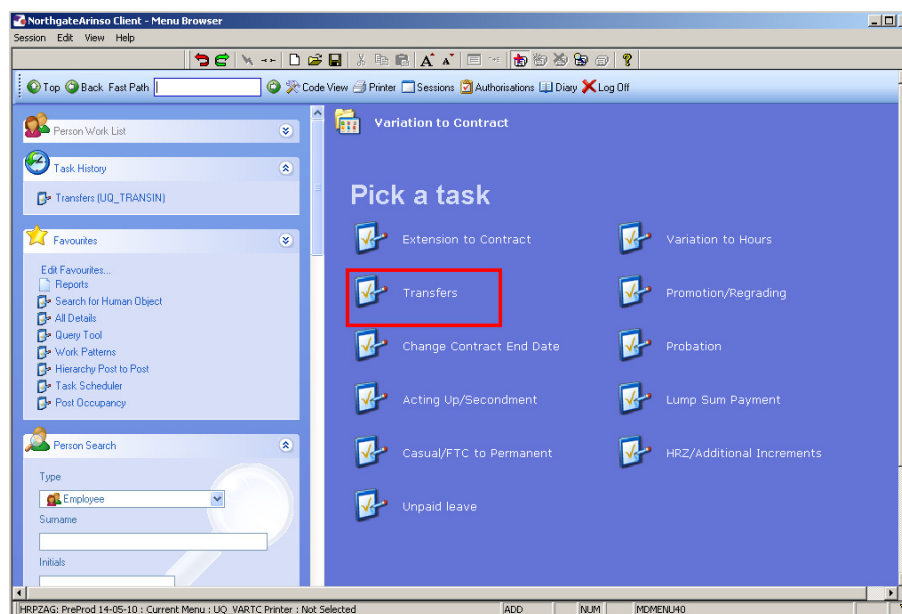
| | |
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1 Entering a Transfer onto ResourceLink

1.1 HR Tasks > Variation to Contract



1.2 Variation to Contract > Transfers



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 |
|---------|-------|-------|------------|--------------------|------------|-----|
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Select Exit Save List

Enter an Employee Number CHANGE NUM MD55522

- 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

Task - Transfers - 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 CHANGE NUM MD5553

- 2.1 Use the **Personal Details** screen to check that you are working on the correct employee.
- 2.2 Do check that the person's email address is still correct. Click on **Email Address** to check (this should be a University of Southampton email address).

MD030G7 Maintain Email Address

General

Email bmtly07@soton.ac.uk

Desc LUCY LASTIC

Preferred Method ☒

Exit

- 2.3 Ensure that the **Preferred Method** box is ticked, otherwise system generated emails (relating to MyView, for example) will not be sent.
- 2.4 Move to the next required screen

3 Employee Work Permit data entry screen

- 3.1 If the work permit information has changed, click on **Add** and add a new row of work permit information.
 - Please refer to the New Starter work instruction for full details about Work Permit and Visa information.
- 3.2 If there is no work permit or the details have not changed, move the required screen

4 Contract Details data entry screen

- Only complete this screen if the employee's new post they are transferring to will be a **Fixed Term Contract**. If the employee's new post is to be a permanent contract, move the required screen

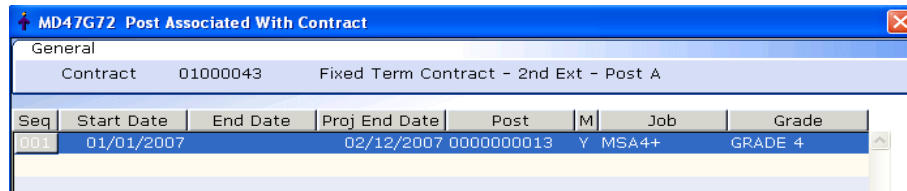
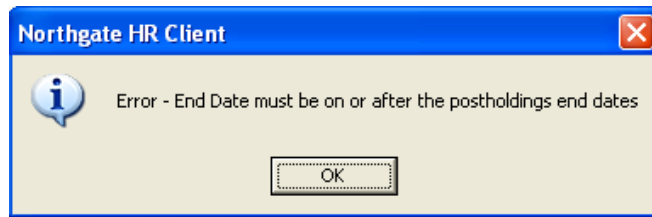
4.1 Press **ENTER** to pass the **Contract Type** field.

4.2 Employees with existing Contract Type information

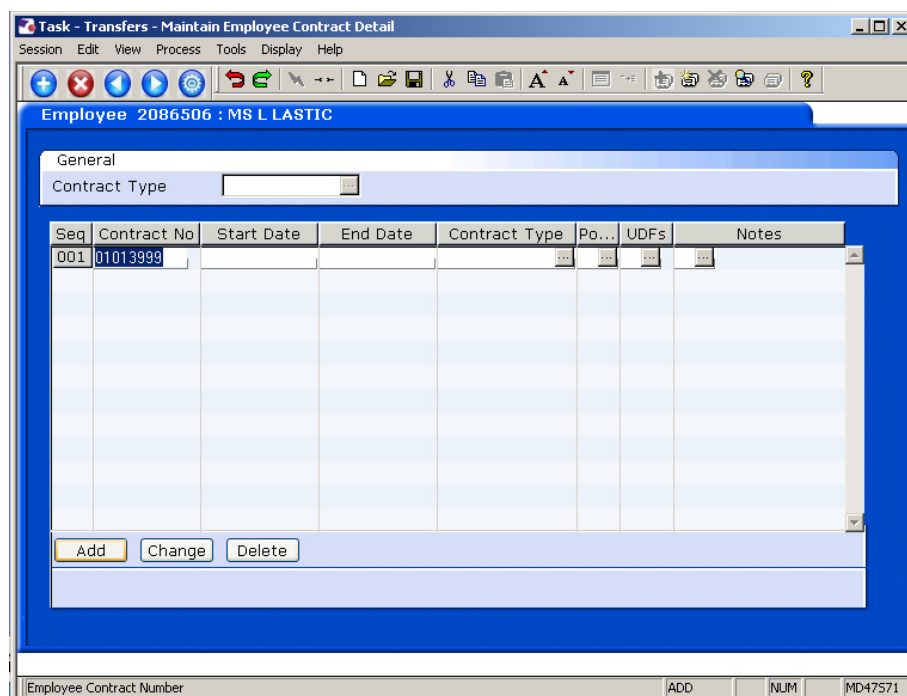
- Please note that if the employee's existing post is also **Fixed Term**, this screen will already contain data. You will need to **end date** all rows that refer to their existing (old) post with the date they leave that post. You can then add a new row that relates to the FTC they are transferring to:

| Seq | Contract No | Start Date | End Date | Contract Type | Posts | UDFs | Notes |
|-----|-------------|------------|------------|---------------|-------|------|-------|
| 001 | 01000023 | 01/01/2007 | 02/12/2007 | FTC01A | N | N | N |
| 002 | 01000043 | 01/01/2007 | 02/12/2007 | FTC02A | Y | Y | N |
| 003 | 01000065 | 03/12/2007 | | FTC01A | N | N | N |

4.3 This end date needs to match the **Projected end date** that is against that post on **Current Post Holding**. If you enter a date that does not correspond you will get the following messages

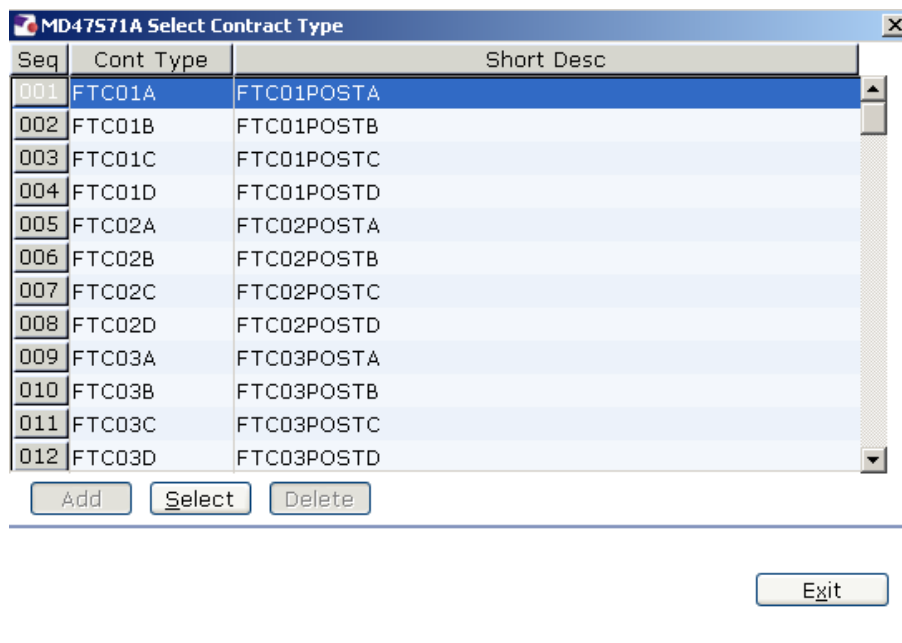


- 4.4 You may need to change the **Projected end date** on the **Current post holding** before you can end date the contracts that relate to their existing (old) post
- 4.5 If there is no existing data in this screen follow the guidance below.
- 4.6 Click on **Add**.



- 4.7 ResourceLink will generate a Contract Number.
 - 4.8 Press **ENTER**.
 - 4.9 Enter the **Start date** of the FTC on the post they are transferring to.
- ☛ Dates **MUST** be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.

- 4.10 Press **ENTER**.
- 4.11 Leave the **End Date** blank. The Projected end date of the contract will be entered into the Current Post Holding screen.
- 4.12 **Window in** to the **Contract Type** field. The following list will be displayed.



| Seq | Cont Type | Short Desc |
|-----|-----------|------------|
| 001 | FTC01A | FTC01POSTA |
| 002 | FTC01B | FTC01POSTB |
| 003 | FTC01C | FTC01POSTC |
| 004 | FTC01D | FTC01POSTD |
| 005 | FTC02A | FTC02POSTA |
| 006 | FTC02B | FTC02POSTB |
| 007 | FTC02C | FTC02POSTC |
| 008 | FTC02D | FTC02POSTD |
| 009 | FTC03A | FTC03POSTA |
| 010 | FTC03B | FTC03POSTB |
| 011 | FTC03C | FTC03POSTC |
| 012 | FTC03D | FTC03POSTD |

Buttons: Add, Select, Delete, Exit

- 4.13 Select the **FTC01POSTA** Contract Type if this is their only FTC post. Select **FTC01POSTB** if this is their second (concurrent) FTC post.
- 4.14 Press **Enter**.
- 4.15 Move to the next required screen

5 Current Post Holding data entry screen

- 5.1 This screen will contain a row for each post they currently hold. To view information on their existing posts window into the **Summary** field on that row.
- 5.2 You will need to add the new post that the employee is transferring into. When the contract is signed and returned for the new post you will need to complete the **Contract Returned** task to end date their old post & un-suspend their new one.

| Seq | Start | Post | M | Grade | Status | N | Detail | Summary |
|-----|------------|------------|---|----------|--------|---|--------|---------|
| 001 | 01/04/2010 | DD03006231 | Y | GRADE 2B | PS001 | N | Y | |

- 5.3 Click on **Add** to add the new post the employee is transferring into.

| Seq | Start | Post | M | Grade | Status | N | Detail | Summary |
|-----|------------|------------|---|----------|--------|---|--------|---------|
| 001 | 01/04/2010 | DD03006231 | Y | GRADE 2B | PS001 | N | Y | |
| 002 | | | | | | | | |

- 5.4 Enter the start date of the transfer to the new post in the **Start** field.
- 5.5 Press **Enter**.
- 5.6 In the **Post** field enter the ID of the post the employee is transferring into.
- 5.7 Press **Enter**.

Post Holding Copy

Copy Details From Another Post ☐

- 5.8 You will never want to copy details from another post, press **Enter** to move past this screen.

- 5.9 This pop-up window is for information that there are staff members in this post. Only add another staff member if this is Maternity cover or job share otherwise a new post is required.

- 5.10 Window into the **Detail** field.

- 5.11 The **Start** field will default to the start date entered in the previous screen.


- 5.12 Window in to the adjacent field.

| Seq | Code | Description | Score |
|-----|--------|--|-------|
| 001 | GD001 | Regrading of Post | |
| 002 | LG036 | End of Visitor status | |
| 003 | LG037 | Visitor to Staff | |
| 004 | PJL001 | Cover for Maternity | |
| 005 | PJL002 | Cover for Career Break/Secondment | |
| 006 | PJL003 | Cover for Sabbatical/Study Leave | |
| 007 | PJL004 | Promotion | |
| 008 | PJL005 | Internal Transfer (in dept)-Restructure | |
| 009 | PJL006 | Int. Transfer (in dept)-Breakdown in Rel | |
| 010 | PJL007 | Internal Transfer (in dept) - Other | |
| 011 | PJL008 | Int. Transfer (in dept)-Flex. Working | |
| 012 | PJL009 | Internal transfer (out dept)-Restructure | |

Buttons: Add, Select, Delete, Exit

5.13 Click on one of the transfer reasons between **PJL005 – PJL014**.

5.14 Press **Enter**.

Post Main Flag 

5.15 If this new Post will be the employee's only or main post, you will need to **Y** flag this field only when you complete the **Contract Returned** task. Use the "**Contract Returned – Transfers**" work instruction.

- Do not **Y** flag this field until the contract for the new post is signed and returned.

5.16 Enter a **Y** in the **Suspended** field.

- This will ensure the person will not get paid for this post until the contract is signed and returned. You will need to use the **Contract Returned** task to un-suspend the employee on this post.

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

MD47L3 Employee Post Holding Details

Detail

Post DD01003418 System Support Coordinator
Job MSA3 Management Specialist & Administrative 3
Employee Grade GRADE 3
Post Grade GRADE 3 Level 3

General Conditions Misc Grade Contract

Service Cond ID MSA3 Management Specialist & Administrative 3
Source JOB
Position Status
Occupancy
Wk Pattern 35MTWTF S0M7T7W7T7F7S0
Source POST

Contract Hours 0.00 Weekly Hours 35.00 Wks Per Year 52.1430
Source POST WK PAT FTE 1.0000 WPY FTE 1.0000

T/S Template Perf Management User Fields Notes
Salary Planning Exit

5.18 Window in to the **Service Cond ID** field.

MD55G27 Employee Service Conditions

General

Post DD01003418 System Support Coordinator
From 01/05/2010 To

| Seq | Start Date | End Date | Service Condition | Description | Notes |
|-----|------------|----------|-------------------|-------------|-------|
| 001 | 01/05/2010 | | | | |

Add Change Delete Expand

Exit

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

- Please ensure that the correct service condition is showing as this impacts several other areas of the system, as well as reports, and can also impact whether or not the person will get paid. If you are unsure, please check with a colleague.



5.20 Click on **OK**.

5.21 Click **Exit**.

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

| Seq | Start Date | End Date | Position Status | Description | Notes |
|-----|------------|----------|-----------------|-------------|-------|
| | | | | | |
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5.23 Click on **Add**.

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

MD55G30 Employee Position Status

General

Post DD01003418 System Support Coordinator

From 01/05/2010 To

| Seq | Start Date | End Date | Position Status | Description | Notes |
|-----|------------|----------|-----------------|-------------|-------|
| 001 | 01/05/2010 | | | | |

| 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

5.25 Select the relevant **Position Status** from the list.

- Please ensure you select the correct position status as what you enter here impacts several other areas of the system, as well as reports, and can also impact the person's pay. If you are unsure, please check with a colleague.

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

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

MD47L2 Employee Work Patterns

General

Post DD01003418 System Support Coordinator

From 01/05/2010 To

| Seq | Start Date | End Date | Work Pattern | Description | S | Start Day | Reason |
|-----|------------|----------|--------------|-------------|---|-----------|--------|
| 001 | 01/05/2010 | | | | | | |

Add Change Delete Expand

Exit

5.28 Click on **Add** and enter through the fields.

5.29 In the **Work Pattern** field either enter through the field to use the pattern already attached to the post or select the appropriate work pattern from the **Work Pattern** drop down list.

5.30 Press **Enter**.

- 5.31 The **Start Day** field refers to the first day of the employee's working week and is entered as a number, as follows:

| Start Day | Day Number |
|-----------|------------|
| Sunday | 1 |
| Monday | 2 |
| Tuesday | 3 |
| Wednesday | 4 |
| Thursday | 5 |
| Friday | 6 |
| Saturday | 7 |

- 5.32 Enter the appropriate number into the **Start Day** field (e.g. for a Monday you should enter "2")

- ☛ Please note that although the vast majority of work patterns are 7 day work patterns, there are a few which are longer (14 days, 21 days and even a few 56 day patterns) – in these cases you will need to work out not only which day of the week the person starts on (e.g. Monday) but also which Monday of their 2 week, 3 week, etc. pattern this is – i.e. are they starting on the first Monday of the pattern (day 2) or the second Monday of the pattern (day 9) etc.

- 5.33 Enter the appropriate number into the **Start Day** field.
- 5.34 **Window in** to the **Reason** field and select the **Post Joining Reason**.
- 5.35 Press **Enter** and **Exit**.
- 5.36 **Window in** to the **Contract Hours** field.

MD47G12 Employee Contract Hours

General

Post DD01003418 System Support Coordinator

From 01/05/2010 To

| Seq | Start Date | End Date | Contract Hours | Wks Per Year | FTE Hours | Hrs Per Year |
|-----|------------|----------|----------------|--------------|-----------|--------------|
| 001 | 01/05/2010 | | | | | |

Add Change Delete


Exit

5.37 Click on **Add** to bring through the **Start Date** and press **Enter** twice.

5.38 In the **Contract Hours** field, enter the weekly working hours.

5.39 Press **Enter**.

5.40 If the employee works less than the whole 52.143 weeks per year, enter the number of weeks per year that they will be working (e.g. "44")

 If the employee is working a Full year (52.143 weeks), then leave the **Wks Per Year** field blank.

5.41 Press **Enter**.

5.42 In the **FTE Hours** field enter the number of hours per week that a Full Time Equivalent would work in this post. For example, although someone in a MSA4+ post might only be working 17.5 hours per week the post itself may well have an FTE of 35 hours, in which case you would enter this in the FTE Hours field.

| Seq | Start Date | End Date | Contract Hours | Wks Per Year | FTE Hours | Hrs Per Year |
|-----|------------|----------|----------------|--------------|-----------|--------------|
| 001 | 01/05/2010 | | 17.00 | | | |

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

5.44 Click on to the **Misc** tab.

MD47L3 Employee Post Holding Details

Detail

Post DD01003418 System Support Coordinator
 Job MSA3 Management Specialist & Administrative 3
 Employee Grade
 Post Grade GRADE 3 Level 3

General Conditions Misc Grade Contract

Location
 Location HIGHFIELD Highfield Campus, Southampton
 Source POST

Average Pay
 Average Pay
 Auto Recalc AvP

Average Hours

T/S Template Perf Management User Fields Notes
 Salary Planning

Exit

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

MD47L17 Employee Location

General

Post DD01003418 System Support Coordinator
 From 01/05/2010 To

| Seq | Start Date | End Date | Location | Description | Source | Reason | Notes |
|-----|------------|----------|----------|-------------|--------|--------|-------|
| | | | | | | | |

Add Change Delete Expand

Exit

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

5.47 Select the location from the **Location** field drop down list.

5.48 Press **Enter**.

5.49 **Window in** to the **Reason** field and select the **Post Joining Reason**.

5.50 Press **Enter**.

5.51 Click **Exit**.

5.52 Click on the **Grade** tab.

MD47G4 Employee Spinal Grade History

General

Post DD01003418 System Support Coordinator

From 01/05/2010 T.

| Seq | Start Date | End Date | Grade | Reason | Source | Source | Point | N |
|------|------------|----------|---------|--------|--------|--------|-------|---|
| 1001 | 01/05/2010 | | GRADE 3 | POSTPL | POSTGD | | 26 | |

Point Rate Enh.Rate Point Amount

Override Date Override Reason

Override Step Carry Forward

Bar Point Current Bar Point

Add Change Delete Expand

Exit

MD47G41 Employee Spinal Grade History

General

Post 0000000032 Administrator

From 01/05/2007 To

| Seq | Start Date | End Date | Grade | Change | Reason | Source | Grade | Point | N |
|-----|------------|----------|---------|--------|--------|--------|-------|-------|---|
| 001 | 01/05/2007 | | GRADE 3 | POSTPL | POSTGD | | | | N |

Point Rate Enh. Rate Point Amount

Override Date Override Reason

Override Step Carry Forward

Bar Point Current Bar Point 26

Add Change Delete Expand Exit

- 5.55 The **Grade** will pull through from the post, however if this is wrong it can be overwritten in this screen.
- 5.56 If this is incorrect or if the employee is on a **Off Scale Salary** or works above the standard hours for their grade (paid on **Hourly Rate Grades** e.g. Nursery staff, Halls Cleaning, Security), window into the **Grade** field.

MD35G3 Grade Selection

Selection

Grade

Obsolete Date

Search

| Seq | Grade | Description |
|-------|-------|--|
| 00001 | AMCF | Research Consultant Fellow (Hon Consult) |
| 00002 | AMCR | Reader (Honorary Consultant) |
| 00003 | AMCS | Senior Lecturer (Honorary Consultant) |
| 00004 | AMDT | Dental Clinical Tutors (Hon Consult) |
| 00005 | AMNL | Clinical Lecturer |
| 00006 | AMNR | Clinical Reader |
| 00007 | AMNS | Clinical Senior Lecturer |
| 00008 | AMPL | Clinical Psychologist |
| 00009 | AMPR | Professor (Honorary Consultant) |

Add Select Delete

Exit

- 5.57 Scroll down the list and select the correct grade or click on the off scale equivalent grade (see examples below of **Off Scale Grades** and **Hourly Rate Grades**).

Off Scale Grades

| Seq | Grade | Description |
|-------|------------|-------------------------------|
| 00059 | OS GRADE4 | Off Scale Level 4 |
| 00060 | OS GRADE5 | Off Scale Level 5 |
| 00061 | OS GRADE6 | Off Scale Level 6 |
| 00062 | OS GRADE7 | Off Scale Level 7 |
| 00063 | OS PROF Z2 | Off Scale Professorial Zone 2 |
| 00064 | OS PROF Z3 | Off Scale Professorial Zone 3 |
| 00065 | OSCLINICAL | Off Scale Clinical |

Hourly Rate Grades

| Seq | Grade | Description |
|-------|------------|---------------------|
| 00028 | GRD1B35.5H | Grade 1B 35.5 Hours |
| 00029 | GRD2A 36H | Grade 2a 36hours |
| 00030 | GRD2A35.5H | Grade 2a 35.5 Hours |
| 00031 | GRD2B 36H | Grade 2b 36 hours |
| 00032 | GRD2B35.5H | Grade 2b 35.5hours |
| 00033 | GRD3 35H | Grade 3 35hours |

5.58 Click on the appropriate Grade or Grade Equivalent for this employee.

5.59 Press **Enter**.

5.60 In the **Reason** field, click on the drop down and scroll down the list and select the reason for the appointment.

☛ The reason **MUST** be the same as was entered at instruction 5.13.

MD57G3 Dependency Selection

| Seq | Code | Description | Score |
|-----|--------|--|-------|
| 001 | GD001 | Regrading of Post | |
| 002 | GD002 | Additional Increment | |
| 003 | GD003 | HRZ Increment | |
| 004 | GD004 | Annual Increment | |
| 005 | GD005 | Protected Ann. Inc. Progress (Job Match) | |
| 006 | GD006 | Cost of Living Award | |
| 007 | GD007 | National Insurance Amendments | |
| 008 | GD008 | No Cost of Living | |
| 009 | GD009 | Senior Officer Consolidation | |
| 010 | LG0037 | Retirement | |
| 011 | LG037 | Visitor to Staff | |
| 012 | PJL001 | Cover for Maternity | |

Add Select Delete

Exit

5.61 **Window in** to the **Point** field and select the **Salary Point** for this employee.

❗ You will not need to select a point if the employee is paid an **Off Scale Salary**, in which case leave this field blank

MD564G4 Spinal Column Points

General

Spinal Column MAINSPINE

| Seq | Point | Value |
|-----|-------|----------|
| 001 | 20 | 22236.00 |
| 002 | 21 | 22879.00 |
| 003 | 22 | 23566.00 |
| 004 | 23 | 24273.00 |
| 005 | 24 | 25001.00 |
| 006 | 25 | 25751.00 |
| 007 | 26 | 26523.00 |
| 008 | 27 | 27319.00 |
| 009 | 28 | 28139.00 |
| 010 | 29 | 28983.00 |

Add Select Delete

Exit

- ☛ If the employee is on a point within the **HRZs** the bar point will have to be changed first before the point can be selected.
- ☛ Please note, you should not move anyone into the HRZ area unless this has been specifically agreed by the School / Department in consultation with HR.

MD47G41 Employee Spinal Grade History

General

Post DD01003418 System Support Coordinator

From 01/05/2010 T.

| Seq | Start Date | End Date | Grade | Change Reason | Source | Grade Source | Point | N |
|---------------|------------|----------|-------------------|---------------|--------------|--------------|----------|---|
| 001 | 01/05/2010 | | GRADE 3 | PJL005 | POSTPL | POSTGD | 21 | N |
| Point Rate | | 12.5365 | Enh.Rate | 12.5365 | Point Amount | | 11112.65 | |
| Override Date | | | Override Reason | | | | | |
| Override Step | | | Carry Forward | | | | | |
| Bar Point | | | Current Bar Point | | 26 | | | |

Add Change Delete Expand

Exit

Annual increments:

Note: For most service conditions, the system will automatically award an increment on the next 1st August unless there is an alternative date entered in the "Override date" field (or if the person has already reached their bar point).

A person is only entitled to receive an extra increment if they have been in post at least 6 months by the time the 1st August comes round.

- ☛ **Please note however that there are some service conditions where the above is not applicable:**

Clinical Consultants, Professorial staff, Level 7 non-professorial staff, ERE staff appointed prior to 01/10/2004 protected on level 3

For staff in posts under these service conditions please follow the instructions in the blue box below.

So, if you are entering a new starter to the University who is starting between 1st August and 1st February then you can safely leave the “Override date” field blank as they will have been in post for 6 months or more by 1st August and should receive a normal increment, which they will automatically (unless they have already reached their current bar point).

Any new starter who will not have been in post for more than 6 months by 1st August (i.e. anyone starting after 1st February of that year) should not receive an increment in August of that year. In such cases, you should:

- Click in the “**Override Date**” field and enter the appropriate date for when they should next get an increment (typically the 1st of August of the following year)
- Click on the “**Override Reason**” field and select “OR006” (Deferred increment due to start date).
- Press **Enter**
- Ensure that a “**1**” is entered in the “**Override Step**” field (so that they will only receive one extra increment).
- Ensure that a “**N**” is entered in the “**Carry Forward**” field – this will mean that in subsequent years the person will receive an increment on the standard date for that Service Condition (typically the 1st August).

- ☛ **Please note:** If you need to add an increment grade row to a record and there is already a future dated grade row which is scheduled to begin after the date of the increment you will need to manually remove and re-enter this.

For example, if in June you were instructed to add an additional increment to someone’s record from 1st August but notice that there is already a grade row starting on 1st September, you would need to:

- copy down the details of this future dated grade row, then delete the row
- add in the increment row from 1st August, then
- re-add the row starting 1st September.

- ☛ If you do ever need to delete and then re-add a grade row, do ensure that you copy the details exactly.

If you have been instructed that a new starter should receive their additional increments on the date of their anniversary – or on a particular date which isn't the standard 1st August – then you should:

- Click in the “**Override Date**” field and enter the appropriate date (such as their anniversary date or other specified date)
- Click on the “**Override Reason**” field and select “**OR001**” (Increment on anniversary) or another relevant reason code.
- Press **Enter**
- Ensure that a “**1**” is entered in the “**Override Step**” field (so that they will only receive one extra increment).
- Ensure that a “**Y**” is entered in the “**Carry Forward**” field – this will mean that in subsequent years the person will receive additional increments on the date you have entered above.

Please note that non-standard incremental progression is only applicable in very limited instances. These are **Clinical Consultants, Professorial staff, Level 7 non-professorial staff, ERE staff appointed prior to 01/10/2004 protected on level 3**

5.62 If you have been instructed that the employee is to be entered on a point that is within the HRZ's click in the **Bar Point** field.

- ☛ Please note, you should not move anyone into the HRZ area unless this has been specifically agreed by the School / Department in consultation with HR.

MD47G47 Employee Grade Bar Point History

General

Post DD01003418 System Support Coordinator
 Post Start 01/05/2010
 Grade GRADE 3 Level 3
 Grade Start 01/05/2010
 Point Start 01/05/2010 Point 21

| Seq | Bar Point | Removed | Reason | N | Reason |
|-----|-----------|---------|--------|---|--------|
| 001 | 26 | | | N | |
| 002 | 27 | | | N | |
| 003 | 28 | | | N | |
| 004 | 29 | | | N | |
| 005 | 30 | | | N | |
| 006 | 31 | | | N | |
| 007 | 32 | | | N | |

Add Change Delete

Exit

5.63 Click on the current bar point at the top of the table and click in the **Removed** field.

5.64 Enter the **date** that the bar point has been removed and press **ENTER** three times.

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

5.65 Repeat this process for each bar point that is to be removed. The new Bar Point will be the next point without a Removed date.

5.66 Click on **Exit**.

5.67 Press **Enter** to update **Current Bar point**. You can now go back to the **Point** field and enter a point within the HRZ.

Please note: if you are ever entering a backdated grade row which will precede a cost of living increase you will need to:

- add a grade row from the start of the new post until the end of the old rate
- then add a new row from the start date of the latest cost of living increase

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

5.69 Click on **User Fields**.

| 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

5.70 Type in the **Probation End Date**, press **ENTER** to move through the remaining fields and click on **Exit**.

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

5.71 Click on the **Contract** tab.

| Detail | | |
|----------------|------------|--|
| Post | DD01003418 | System Support Coordinator |
| Job | MSA3 | Management Specialist & Administrative 3 |
| Employee Grade | GRADE 3 | Level 3 |
| Post Grade | GRADE 3 | Level 3 |

General Conditions Misc Grade Contract

Redeployment Reason

Projected End Date

Contract Number

HESA Indicator ☐

T/S Template Perf Management User Fields Notes Salary Planning

Exit

☛ The **Redeployment Reason** field is not used.

5.72 If the employee is on a Fixed Term Contract enter a **Projected End Date** then click in the **Contract Number** field and select the contract entered previously on the Contract Details Screen for this new post.

MD47G73 Employee Contracts Selection

General

Employee 2086506 MS L LASTIC

Post DD01003418

From 01/05/2010 To

| Seq | Contract No | Start Date | End Date | Contract Type |
|-----|-------------|------------|----------|---------------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Add Select Delete Expand

Exit

- 5.73 If they have more than 1 FTC ensure you pick the correct contract for that post.
- 5.74 If the post is HESA returnable type **Y** into the **HESA Indicator** field.
- 5.75 Press **ENTER** and click on **Exit**.

Task - Transfers - Employee Current Post Details

Session Edit View Process Tools Display Help

Employee 2086506 : MS L LASTIC

| Seq | Start | Post | M | Grade | Status | N | Detail | Summary |
|-----|------------|------------|---|----------|--------|---|--------|---------|
| 001 | 01/05/2010 | DD01003418 | N | GRADE 3 | PS002 | N | Y | ... |
| 002 | 01/04/2010 | DD03006231 | Y | GRADE 2B | PS001 | N | Y | ... |

Add Change Delete Expand

Post Linking

Pseudo-Sequence Number for Index Paging CHANGE NUM MD4751B

- 5.76 The employee's existing post and the post they are transferring into will now appear on the **Current Post Holding** screen.
- i** When the employee returns their contract on the post they are transferring into, you will need to end date their existing post, un-suspend their new post and flag their new post as Main. See **Contract Return – Transfers** work instruction.

5.77 Move to the next required screen

Employee 2086506 : MS L LASTIC

General

Post DD01003418

Start Date End Date

| Seq | Start Date | End Date | Detail | Notes |
|-----|------------|----------|--------|-------|
| | | | | |

6.4 Press **Enter**.

Employee 2086506 : MS L LASTIC

General

Post DD01003418 System Support Coordinator

Start Date 01/05/2010 End Date

| Seq | Start Date | End Date | Detail | Notes |
|-----|------------|----------|--------|-------|
| | | | | |

Add Change Delete

6.5 Click on **Add**

6.6 In the **Start Date** field enter the start date of the post the employee is transferring into.

6.7 Press **Enter**.

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

MD49G12 Costing Details

| Seq | Cost Centre | Ee's % | Er's % |
|-----|-------------|--------|--------|
| | | | |

Add Change Delete Expand

Exit

6.9 Click on **Add**.

- 6.10 Enter the **Cost Centre** number (Sub Project Code- starts with 5)that this post is to be paid from. Press **Enter**.
- 6.11 In the **Ee's** field enter the percentage that this post is to be paid from this cost centre e.g. 100
- 6.12 In the **Er's** field enter the percentage that this post is to be paid from this cost centre e.g 100
- 6.13 Press **Enter**.
- 6.14 If the post is to be paid from more than 1 cost centre, add another row of information.
 - ☛ Please ensure that the Ee's Column adds up to 100%
 - ☛ Please ensure that the Er's Column adds up to 100%.
- 6.15 Click on **Exit**.
- 6.16 Press **Enter**.
- 6.17 Move to the next required screen

7 Employment Detail data entry screen

- 7.1 The **Current Start** field will display the start date of their Continuous Service.

Task - Transfers - Employment Detail

Session Edit View Other Process Tools Display Help

Employee 2086506 : MS L LASTIC

Dates

| | | | |
|----------------|------------|-------|-----------------|
| Original Start | 01/04/2010 | SG001 | New Appointment |
| Current Start | 01/04/2010 | SG001 | New Appointment |
| Termination | | | |
| To Staff | | | |
| Probation | | | |

Additional

Service 1 Month 24 Days

Employee Type

Self Service Unit

Willing to Job Share ☐ TUPE

Notice Period

No Of Current Posts 2

Service Breaks User Fields Notes Empl. History

Enter the employee's Original Start Date ADD NUM MD4751A

- 7.2 Move to the next required screen

8 Holiday Entitlement data entry screen

| 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 |

Buttons: Add, Change, Delete, Expand

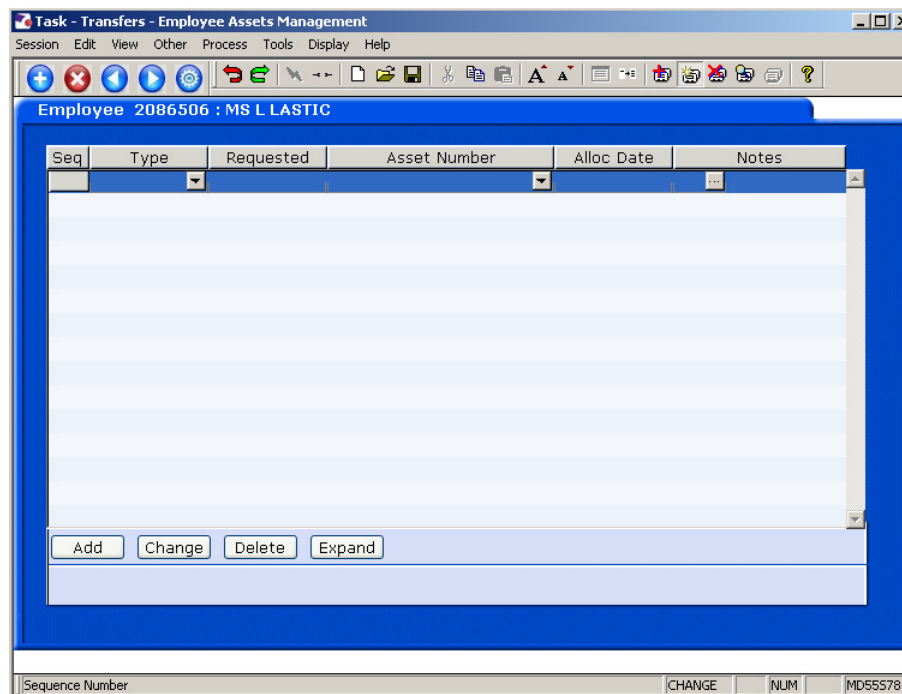
Work Pattern

Status bar: Pseudo-Sequence Number for Index Paging, CHANGE, NUM, MD8255

- 8.1 Click on **Add** if the employee is to receive a holiday entitlement.
- 8.2 Enter the employee's start date into the **Start Date** field and press **ENTER**. (this field will default to 1st October, overwrite this with the employee's actual start date).
 - ☛ Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.
- 8.3 In the **End Date** field, enter the end date of the current leave year (always 30th September) unless the employee is on a fixed term contract which is due to expire before this date – in which case enter the end date of the FTC. Then press **ENTER** through the remaining fields.
- 8.4 The "**Entlmnt**" field should automatically populate.
 - ❗ If there is no entitlement the employee is either rightly attached to a service condition (see Current Post Holding) where they have no entitlements or they are attached to the wrong service condition.
- 8.5 Move to the next required screen

9 Asset Management

9.1 This screen may show assets already attached to the employee



9.2 Click on **Add** if the employee is to be assigned particular assets to the post they are transferring into e.g. a laptop

9.3 Select the asset type from the drop down list.

| Code | Desc | Long Description |
|--------|------------|--------------------------|
| CPP- B | CPP - B | Car Park Permit - Post B |
| CPP-A | CPP - A | Car Park Permit - Post A |
| CRC- A | CCard - A | Credit Card - Post A |
| CRC-B | CCard - B | Credit Card - Post B |
| KEYS-A | Keys - A | Keys - Post A |
| KEYS-B | Keys - B | Keys - Post B |
| LAPT-A | Laptop - A | Laptop - Post A |
| LAPT-B | Laptop - B | Laptop - Post B |

- ☛ There are 2 versions for each asset type – choose the right asset dependant on which post it is related to.

9.4 Press **Enter** and amend the date requested if necessary.

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

9.5 Enter through the rest of the fields on the row.

9.6 Move to the next required screen

10 Basic Pay Details data entry screen

- 10.1 Check the employee will remain in the same **Pay Group** in their new post. This will generally be the case unless the employee is moving from Fees/Casual to Staff – In such cases use the **Casual to FTC/Permanent** work instruction.

Task - Transfers - Basic Pay Detail

Session Edit View Other Process Tools Display Help

Employee 2086506 : MS L LASTIC

Pay Control

| | | | |
|------------|------------|----------|----------------|
| Pay Group | SubPayroll | PSUB1 | Staff |
| Ctrl group | Payroll | PAYROLL1 | (Main Payroll) |
| Pay Type | M | Monthly | |
| Pay Method | CHEQUE | Cheque | |
| Cheque Pay | | | |

Other

| | | |
|-------------------|---|--------------------------------------|
| Last Paid Year | | |
| Period | | |
| Date | | |
| Suspended Flag | N | Backdate NI <input type="checkbox"/> |
| 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

CHANGE NUM MD4952

- 10.2 Move to the next required screen

11 General MyView Parameters Data Entry Screen

- 11.1 This screen is where you set up the MyView profile that the employee should be allocated.

- 11.2 This screen is where you set up the MyView profile that the employee should be allocated.

☛ The **Password** field will read “Not Allocated” for a new starter.

- 11.3 In the **Profile** field, select the relevant MyView profile for this employee (do not leave this set to the default of EMPDEFAULT). Which MyView profile the person should be on will depend on whether they are a line manager or not and also on how their particular School / Department is using MyView.
- 11.4 You do not need to issue a MyView password as the person is not yet an employee and will also not yet have a University email address. When a new starter begins work they should be informed by their School / Department to contact ServiceLine in order to receive a MyView password.
- 11.5 Move to the next required screen

12 Fixed Pay Elements Summary data entry screen

- 12.1 The screen will already contain active Pay Elements for the employee's current post e.g. Basic Pay. When the Contract Return task is completed and their old post is end dated, this will end all pay elements related to that post then.

| Seq | Post | Code | Desc | E | Start | Period | Amt | A | D | M | S |
|-----|------------|------|-----------|---|------------|--------|---------|---|---|---|---|
| 001 | DD03006231 | 1000 | Basic Pay | | 01/05/2010 | | 1454.03 | | | | N |
| 002 | DD03006231 | 1000 | Basic Pay | * | 01/04/2010 | | 1744.83 | | | | N |

Buttons: Add, Change, Delete, Expand

Currency

Pseudo-Sequence Number for Index Paging

- 12.2 Click on **Add**

MD48G10 Select Pay Element

Selection

Pay Element [Dropdown]


Employment [Dropdown]

Exit

- 12.3 **Window in** to the **Pay Element** field and Enter through the three fields to display the list of pay elements.

| Seq | Code | Por D | Type | Short Desc | Long Description |
|------|------|-------|------|------------|-----------------------------------|
| 0001 | 0001 | D | N | Tax Paid | Tax Paid |
| 0002 | 0002 | D | N | Tax Rebate | Tax Rebate Withheld |
| 0003 | 0010 | D | NI | NI C/I | NI Contracted In |
| 0004 | 0011 | D | NI | NI A Saved | Non-Directors A Rate NI |
| 0005 | 0020 | D | NI | NI Wfe C/I | NI Wife Contracted In |
| 0006 | 0021 | D | NI | NI B Saved | Non-Directors B Rate NI |
| 0007 | 0025 | D | NI | NI CI Def. | NI Contracted in (Deferred) |
| 0008 | 0026 | D | NI | NI C Saved | Non-Directors C Rate NI |
| 0009 | 0030 | D | NI | NI Pen C/I | NI Pensioner Contracted In |
| 0010 | 0031 | D | NI | NI C Saved | Non-Directors C Rate NI |
| 0011 | 0035 | D | NI | NI CO Def. | NI Contracted out (COSR) Deferred |

- 12.4 Scroll down the list and select the required pay element (Code **1000** is **Basic Pay**, codes 0001 – 0999 are standard RLink pay elements, 1000+ are UoS specific). The following data entry screen is displayed:

-  If the employee is to be paid a salary of a non spinal amount you will need to enter the PE **2000-Basic Pay Non Spinal** and enter an amount, rather than using PE 1000.

- 12.5 **Window in to the Post field.** A list of the employee's posts is displayed.

| Seq | Post | Short Desc | Start Date | End Date | Type | Main Flag |
|-----|------------|------------|------------|----------|------|-----------|
| 001 | DD01003418 | System Sup | 01/05/2010 | | | N |
| 002 | DD03006231 | SYS SUPP | 01/04/2010 | | | Y |

- 12.6 Click on the new post this PE is to be attached to.

- 12.7 Press **Enter** to move through the **Start date**.

- 12.8 **Window in** to the **Reason** field and select the **Post Joining Reason**.
- 12.9 Press **Enter** through the **End Date**.
- 12.10 If the PE you are entering requires a specific amount to be attached to it, enter this in the **Amount** field. For PE 1000 – Basic Pay, this is not required.
- 12.11 Press **Enter** to move through the remaining fields
- 12.12 The Fixed PE Screen will be updated.
- 12.13 Click on **Add** and repeat this process for each Fixed PE the employee is to continuously receive each month for the post they are transferring to.
 - ☼ When you complete the **Contract Returned** task and put an end date on their previous post, the Basic Pay row for that post will automatically end.
- 12.14 Move to the next required screen

13 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 | | |
| 003 | ACAP | 001 | ACAP | | |
| 004 | CLINAC | 001 | Clinical Academic/Clinical Research | | |
| 005 | CLINPROF | 001 | Clinical Consultant | | |
| 006 | DEMO | 001 | Demonstrator | | |
| 007 | ITINNOV | 001 | IT Innovation | | |
| 008 | KTP | 001 | Knowledge Transfer Partners | NOACT | 1 |
| 009 | LEV 1-3 | 001 | Levels 1 - 3 | NOACT | 1 |
| 010 | MCURIE | 001 | Marie Curie Contract | NOACT | 1 |
| 011 | PROFFTC | 001 | Professorial - Fixed Term Contract | NOACT | 1 |

- 13.1 Click in the **Let Opts** field of the standard letter you want to produce
- 13.2 Click on the drop down and select **MERGE – Immediate print with manual changes**.
- 13.3 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 | 01/04/2010 | | | |
| 002 | DD01003418 | 01/05/2010 | | | N |
| 003 | DD03006231 | 01/04/2010 | | | Y |
| 004 | | | | | |
| 005 | | | | | |
| 006 | | | | | |
| 007 | | | | | |
| 008 | | | | | |
| 009 | | | | | |

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

- 13.7 If any of the pop-up windows only have one row of data, simply click on **Select**.
- 13.8 If any of the pop-up windows do not show any rows of data, simply click on **Exit**.
- 13.9 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.**