

This work instruction was last updated: 31st March 2010


HR Visitor Process

This Work Instruction describes the HR Visitor Process.

Section 1 Explains how to check and search for Visitors who may already be on the system (Past visitors).

Section 2 – 9 Explains how to enter a **New Visitor** (a visitor who is not already on the system).

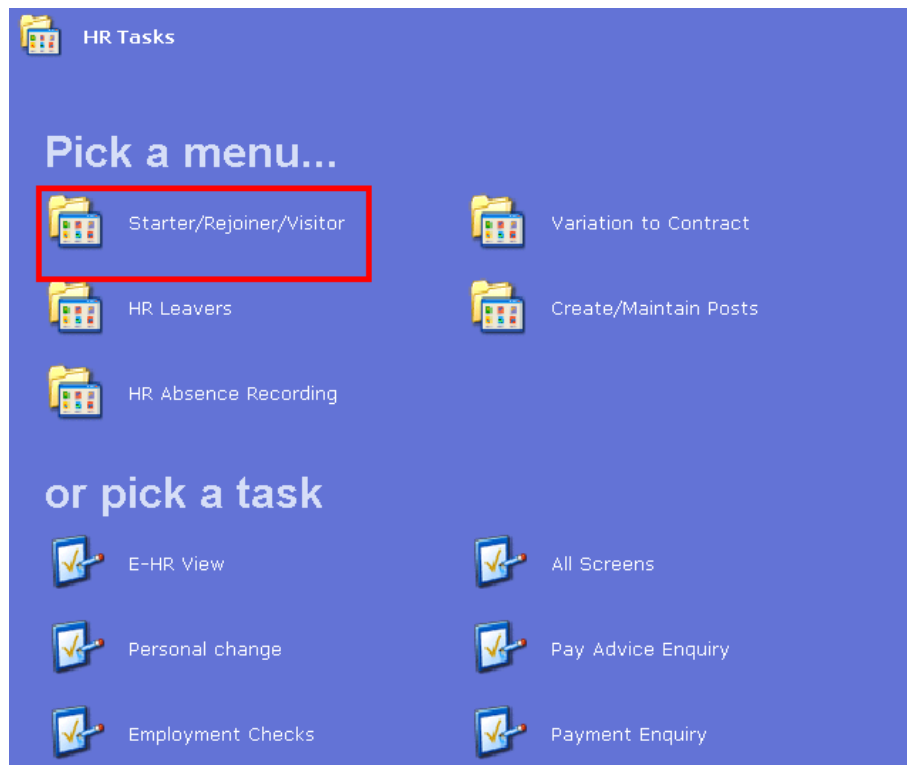
Section 10 -17 Explains how to enter **Returning Visitors** (a visitor who has left the University, and is now returning).

 Please follow the correct sections dependant on if your visitor is a **New Visitor** or a **Returning Visitor**.

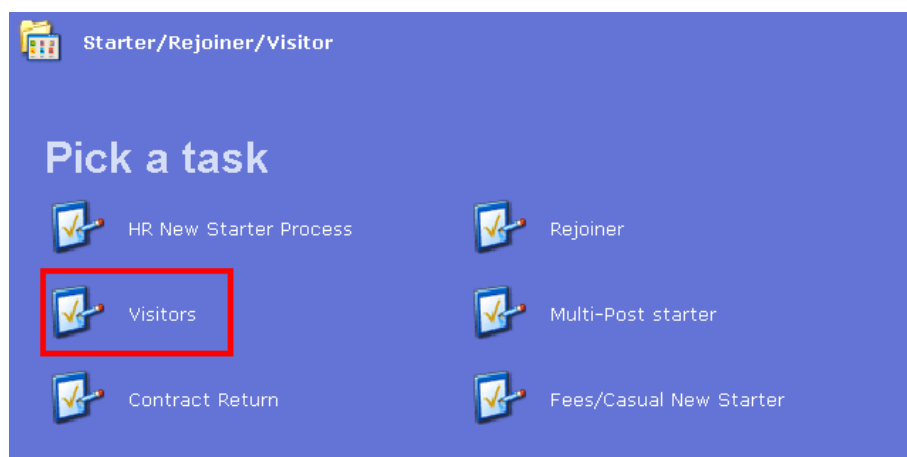
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1 Setting Up a New Visitor

1.1 ResourceLink HR Home Page - HR Tasks – Starter/ Rejoiner/Visitor



1.2 Select Visitors



1.3 The Employee Selection Screen will be displayed.

Task - Fees/Casual New Starter - Employee Selection Screen

Employee Other Numbers Structure Saved List Employment

Match ☒ Exact ☐ Partial

Employee Number

Surname Initials

Sex Nat. Ins. No.

Current Employee ☒ Y ☐ N As at Date 29/03/2010

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 MD55322

1.4 To add a new starters select ADD

1.5 The new staff number is generated Select Yes

CTDIALOG Dialogue Box

General

The next available Employee Number is '2074524'. 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.

Enter the address.

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

Click **Exit**.

- 2.3 Click on **Contact Tel** to enter the contact telephone details (if you know them).

MD55G3A Maintain Contact Numbers

Main Contact Numbers

Home Phone No

Work Phone No

Mobile Phone No

Fax No

Additional Contact Numbers

Contact1 Phone No

Contact2 Phone No

Exit

- 2.4 Enter all known details and click on **Exit**.

- 2.5 Click on **Email Address** to enter the email address details (if known).

MD030G7 Maintain Email Address

General

Email

Desc

Preferred Method ☐

Exit

- 2.6 Enter the email address and click on **Exit**.

- 2.7 Click on **User Fields** to enter the **Unique Identifier** (not used at present) and the **Pay Point**.

MD00G32 Simple User Defined Field Data

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

Unique Identifier

Exit

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

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


Exit

Press the **ENTER** key to display the list of available Pay Points.

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

- 2.9 Click on the required Pay Point.
- 2.10 Click on **Exit**.
- 2.11 Click on  to move to the next data entry screen.

3 Relationship data entry screen

3.1 Click on **Add** to enter the details of the visitor's next of kin.

3.2 Click on the down arrow in the **Code** field and select **NOK**.


3.3 **ENTER** past the **Emp No.** field.

3.4 **Window in** to the **Dets** field and complete the known personal details for the employee's next of kin.

Click on the **Address** and **Telephone** fields to enter this information.

Click on **Exit**.

3.5 If you wish to add more than one next of kin contact repeat the steps

3.6 Click on  to move to the next data entry screen.

4 Employment Detail data entry screen

4.1 Click in the **Original Start** field and enter the start date of the Visitor.

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

4.2 Click in the adjacent field and **window in**.

Seq	Code	Description	Score
001	LG0037	Retirement	
002	LG037	Visitor to Staff	
003	PJL004	Promotion	
004	PJL005	Internal Transfer (in dept)-Restructure	
005	PJL006	Int. Transfer (in dept)-Breakdown in Rel	
006	PJL007	Internal Transfer (in dept) - Other	
007	PJL008	Int. Transfer (in dept)-Flex. Working	
008	PJL009	Internal transfer (out dept)-Restructure	
009	PJL010	Int.Transfer (out dept)-Breakdown in Rel	
010	PJL011	Internal Transfer (out dept) - Other	
011	PJL012	Secondment	
012	PJL013	Acting Up	

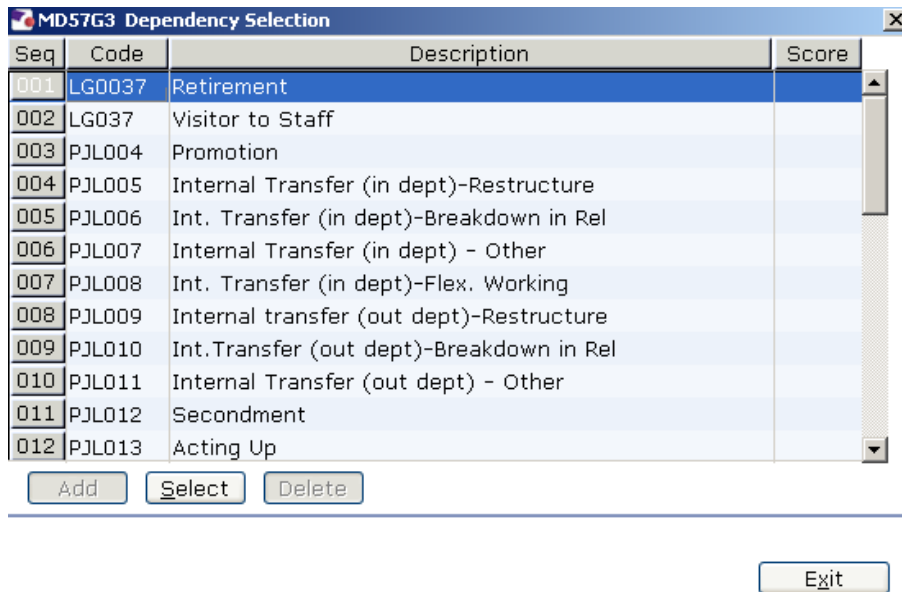
4.3 Click on **SG003 Visitor Appointment**.

4.4 Press **Enter**.

4.5 In the **Current Start** enter again the start date of the Visitor.

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

4.6 Click in the adjacent field and **window in**.




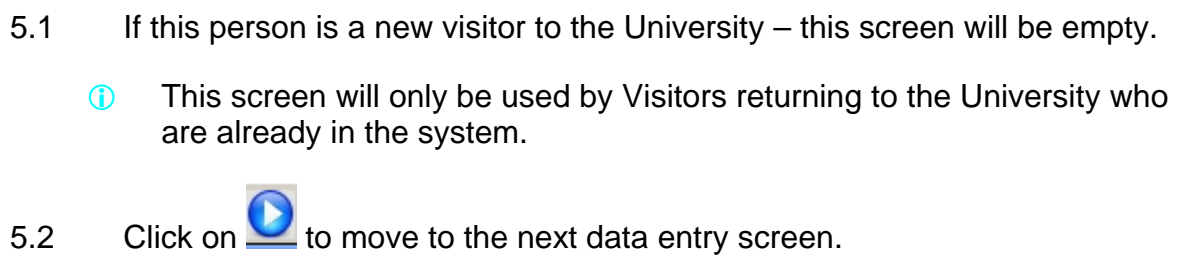
Seq	Code	Description	Score
001	LG0037	Retirement	
002	LG037	Visitor to Staff	
003	PJL004	Promotion	
004	PJL005	Internal Transfer (in dept)-Restructure	
005	PJL006	Int. Transfer (in dept)-Breakdown in Rel	
006	PJL007	Internal Transfer (in dept) - Other	
007	PJL008	Int. Transfer (in dept)-Flex. Working	
008	PJL009	Internal transfer (out dept)-Restructure	
009	PJL010	Int.Transfer (out dept)-Breakdown in Rel	
010	PJL011	Internal Transfer (out dept) - Other	
011	PJL012	Secondment	
012	PJL013	Acting Up	

Buttons: Add, Select, Delete, Exit

4.7 Click on **SG003 Visitor Appointment**.

4.8 Press **Enter**.

4.9 Click on  to move to the next data entry screen.



6 Current Post Holding data entry screen

6.1 Click on **Add** to enter the Current Post Holding data for the visitor.

6.2 Type in the **Start Date**.

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

6.3 Press **ENTER**.

6.4 Type the Visitor Post Number (for the appropriate school/dept) into the **Post** field.

❗ The post number will often be a set of initials to denote the School or Department followed by the digits 00, a hyphen (-) and then VISIT. For example – **DK00-VISIT** for a visitor post in CAMS.

☛ Be aware however that bigger Schools or Department's Visitor posts will be slightly more specific. For example **KW04-VISIT** would refer to a visitor post in the School of Humanities in the English Department or Faculty. The second digit will specify the Department or Faculty within the School.

6.5 Press **Enter**.

6.6 Click on **OK**.

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

6.7 Click in the **Details** field and **Window in**.

The screenshot shows the 'MD47L3 Employee Post Holding Details' window with the 'General' tab selected. The 'Detail' section contains the following information:

Post	KW04-VISIT	Visitor
Job	UNPAIDVIS	Unpaid Visitor
Employee Grade		
Post Grade	DEFAULT	SYSTEM DEFAULT GRADE

Below the tabs, the 'Start' date is 31/03/2010 and the 'End' date is empty. The 'Service In Post' section has 'Projected End' set to empty. The 'Post Main Flag' is unchecked, and 'Suspended' is also unchecked. The 'Exc. from attracting Ee's Costs' checkbox is unchecked. At the bottom, there are links for 'T/S Template', 'Perf Management', 'User Fields', 'Notes', and 'Salary Planning', along with an 'Exit' button.

6.8 Click in **Post Main Flag** field and Type **Y**.

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

The screenshot shows the 'MD47L3 Employee Post Holding Details' window with the 'Conditions' tab selected. The 'Detail' section contains the following information:

Post	KW04-VISIT	Visitor
Job	UNPAIDVIS	Unpaid Visitor
Employee Grade		
Post Grade	DEFAULT	SYSTEM DEFAULT GRADE

Below the tabs, the 'Service Cond ID' is UNPAIDVIS, 'Source' is JOB, and 'Position Status' is empty. The 'Occupancy' is empty, 'Wk Pattern' is DEFAULT, and 'Source' is POST. The 'Contract Hours' is 0.00, 'Weekly Hours' is 1.0000, and 'FTE' is 00.0000. At the bottom, there are links for 'T/S Template', 'Perf Management', 'User Fields', 'Notes', and 'Salary Planning', along with an 'Exit' button.

6.10 **Window in** to the **Service Cond ID** field

MD55G27 Employee Service Conditions

General

Post KW04-VISIT Visitor
From 31/03/2010 To

Seq	Start Date	End Date	Service Condition	Description	Notes
001	31/03/2010				

Add Change Delete Expand

Exit

- 6.11 Click on **Add** and press **Enter** three times to pull through the Service Conditions.

Task - Visitors

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

OK

- 6.12 Click **Exit**.
- 6.13 **Window in the Position Status Field.** The following screen will appear:

MD55G30 Employee Position Status

General

Post KW04-VISIT Visitor
From 31/03/2010 To

Seq	Start Date	End Date	Position Status	Description	Notes
001	31/03/2010				

Add Change Delete Expand

Exit

6.14 Click on **Add**.

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

MD55G30 Employee Position Status

General

Post KW04-VISIT Visitor

From 31/03/2010 To

Seq	Start Date	End Date	Position Status	Description	Notes
001	31/03/2010				

Add Change Delete Expand

Exit

6.16 Select either **VISITOR1** or **VISITOR2** (depending on if they requires access to systems).

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

6.18 Leave the **Wk Pattern** field as Default.

6.19 Window into the **Contract Hours** field:

MD47G12 Employee Contract Hours

General

Post KW04-VISIT Visitor

From 31/03/2010 To

Seq	Start Date	End Date	Contract Hours	Wks Per Year	FTE Hours	Hrs Per Year
001	31/03/2010		0.00			

Add Change Delete

Exit

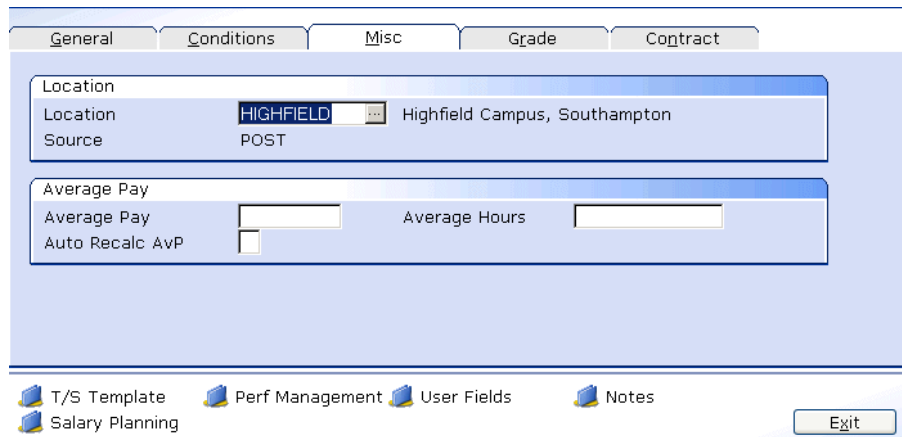
6.20 Enter through to the **Contract Hours** field and enter **'0'**

6.21 Enter through to the end of the row

- ☛ You must window in to the Contract Hours field and ensure there is a start date and a figure in the “Contract Hours” column as above (even though it is a zero) otherwise the system will not view this record as being complete and will not include it in any reports.

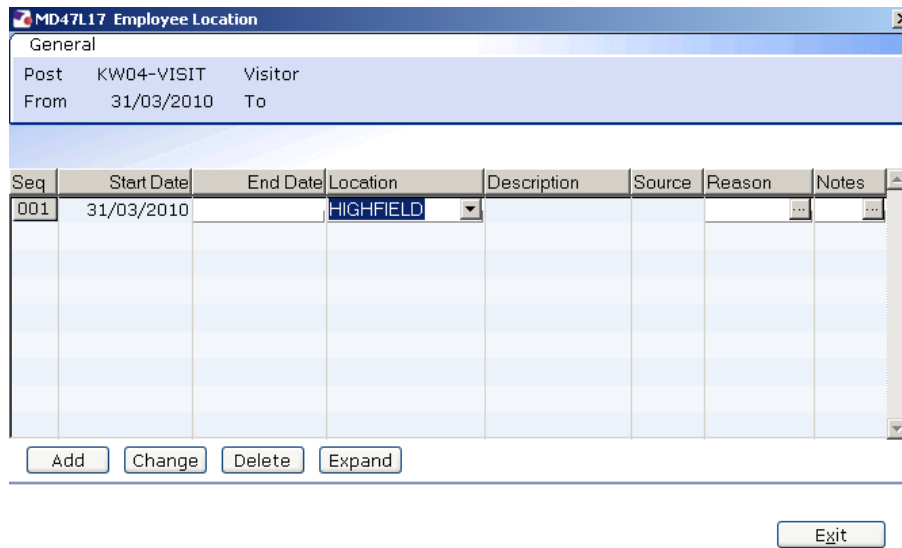
6.22 Click on **Exit** 

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



The screenshot shows the 'Misc' tab selected in a window with tabs: General, Conditions, Misc, Grade, and Contract. The 'Location' field is set to 'HIGHFIELD' with a dropdown arrow, and the text 'Highfield Campus, Southampton' is visible. Below it, the 'Source' field is set to 'POST'. The 'Average Pay' section has fields for 'Average Pay' and 'Average Hours', both empty. There is an 'Auto Recalc AvP' checkbox which is unchecked. At the bottom, there are icons for 'T/S Template', 'Perf Management', 'User Fields', and 'Notes', along with an 'Exit' button.

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



The screenshot shows the 'MD47L17 Employee Location' window. The 'General' tab is selected. The 'Post' field is 'KW04-VISIT' and the 'Visitor' field is 'Visitor'. The 'From' date is '31/03/2010' and the 'To' date is empty. Below this is a table with columns: Seq, Start Date, End Date, Location, Description, Source, Reason, and Notes. The first row has '001' in Seq, '31/03/2010' in Start Date, and 'HIGHFIELD' in Location. Below the table are buttons for 'Add', 'Change', 'Delete', and 'Expand'. An 'Exit' button is at the bottom right.

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

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

6.27 Press **Enter**.


- 6.28 **Window in** to the **Reason** field and select **SG003 Visitor Appointment**.
- 6.29 Press **Enter**.
- 6.30 Click **Exit**.
- 6.31 Click on the **Grade** tab.

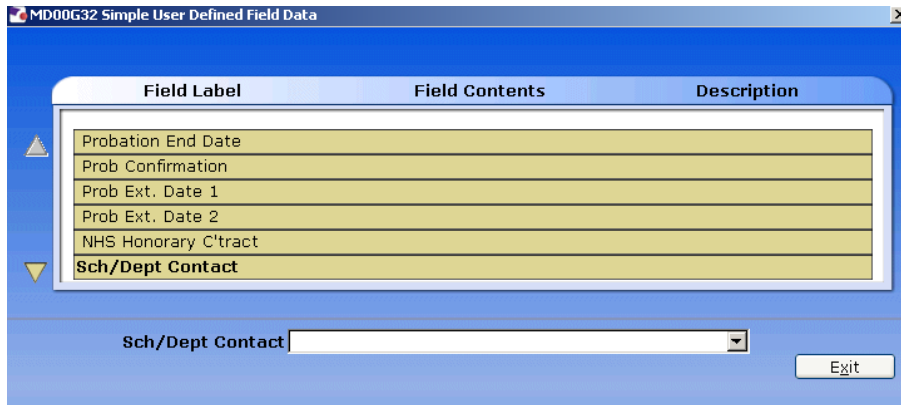
Seq	Start Date	End Date	Location	Description	Source	Reason	Notes
001	31/03/2010		HIGHFIELD				

i Do not complete this tab.

- 6.32 Click on the **Contract** tab.

- 6.33 Click in the **Projected End Date** field.
- 6.34 Enter the date the visit is expected to finish.
- 6.35 Enter a **“N”** in the **HESA Indicator** field (this indicates that as this person is a visitor they should not be included in the HESA return).

- 6.36 Click on the **User Field** icon at the bottom of the screen  User Fields
- 6.37 Click in the **School/Dept Contact** field
- 6.38 Type the name of the **Contact**

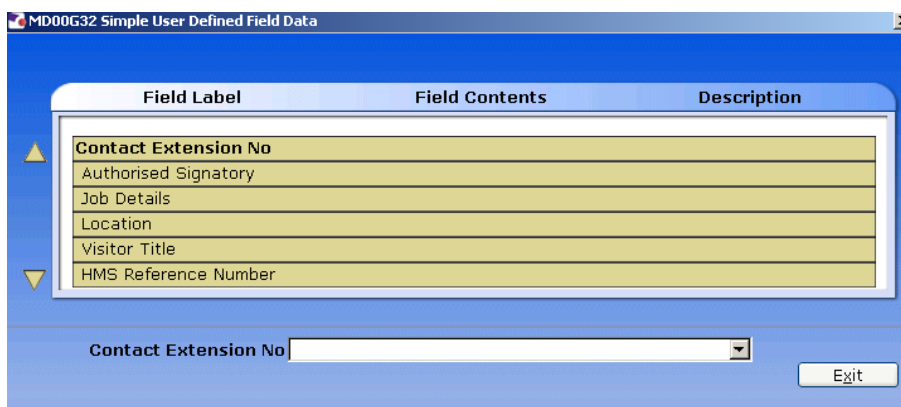


Field Label	Field Contents	Description
Probation End Date		
Prob Confirmation		
Prob Ext. Date 1		
Prob Ext. Date 2		
NHS Honorary C'tract		
Sch/Dept Contact		

Sch/Dept Contact

Exit


- 6.39 Press **Enter**
- 6.40 Type the **Contact Ext No** in the highlighted field



Field Label	Field Contents	Description
Contact Extension No		
Authorised Signatory		
Job Details		
Location		
Visitor Title		
HMS Reference Number		

Contact Extension No

Exit

- 6.41 Press **ENTER** and click on **Exit**.
- 6.42 Click on  to move to the next data entry screen.

7 Basic Pay Details data entry screen

Task - Visitors - Basic Pay Detail

Session Edit View Other Process Tools Display Help

Employee 2074524 : MS L LASTIC

Pay Control

Pay Group

Ctrl group

Pay Type

Pay Method **CHEQUE** Cheque

Cheque Pay

Other

Last Paid Year

Period

Date

Suspended Flag **N** Backdate NI ☐

Industrial Action **N**

Starter Flag **Y**

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**

7.1 Window in to the Pay Group field.

MD45G3 Structure Unit Group selection

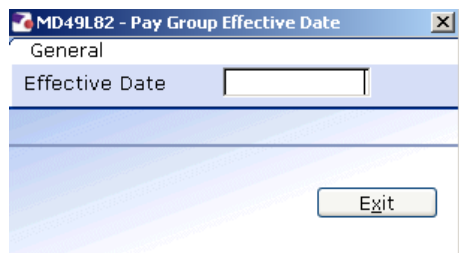
Seq	Structure	Description	Level
001	PSUB1	Staff	SubPayroll
002	PSUB2	Pensioners	SubPayroll
003	PSUB3	Fees/Casual	SubPayroll
004	PSUB4	Teachers	SubPayroll
005	PSUB5	Unpaid	SubPayroll
006	PAYROLL1	(Main Payroll)	Payroll
007	PAYROLL2	(Teachers Payroll)	Payroll
008	PAYROLL3	(Unpaid)	Payroll

Add **Select** **Delete** **Expand**

Exit

7.2 Select the PSUB5 Pay Group.

7.3 The following dialogue box will appear



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.

7.4 Ensure the **Pay method** field is set as **Cheque**.

7.5 There are no more tabs to complete, click on **Save**.



8 Standard letters

MD103G2 Standard Letters Attached to the Task

Seq	Letter	Ver	Description	Let Opts	Copies
001	EMERITUS	001	Emeritus Professor	NOACT	1
002	WISEXTN	001	Visitor Extension	NOACT	1
003	VISIT-SO	001	Visitor - spin out	NOACT	1
004	VISITOR	001	Visitor	NOACT	1
005	VIS_NERC	001	Visitor NERC	NOACT	1
006	VIS_SUSU	001	Visitor SUSU	NOACT	1

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**.

MD103G2 Standard Letters Attached to the Task

Seq	Letter	Ver	Description	Let Opts	Copies
001	EMERITUS	001	Emeritus Professor	NOACT	1
002	WISEXTN	001	Visitor Extension	NOACT	1
003	VISIT-SO	001	Visitor - spin out	NOACT	1
004	VISITOR	001	Visitor	NOACT	1
005	VIS_NERC	001	Visitor NERC		
006	VIS_SUSU	001	Visitor SUSU		

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

- 8.3 Click on **Exit**.
- 8.4 Select appropriate Post

DRT125EW Employee Post Holding

General

Select Employee Post Holding

Seq	Post	Start Date	End Date	Occ Type	Main
001	EMPLOYEE	31/03/2010			
002	KW04-VISIT	31/03/2010			Y
003					
004					
005					
006					
007					
008					
009					

Add Select Delete

Exit

8.5 Select the latest hierarchy

Seq	Hierarchy	Eff Date
001	HR MAIN	01/11/2008
002	HR MAIN	01/09/2008
003	HR MAIN	01/08/2008
004	HR MAIN	01/04/2008
005	HR MAIN	14/01/2008
006	HR MAI Post Number	01/01/1940
007	HRMAIN01	01/01/1940
008	HRMAIN02	14/01/2008
009	HRMAIN03	01/04/2008

8.6 Complete the following form

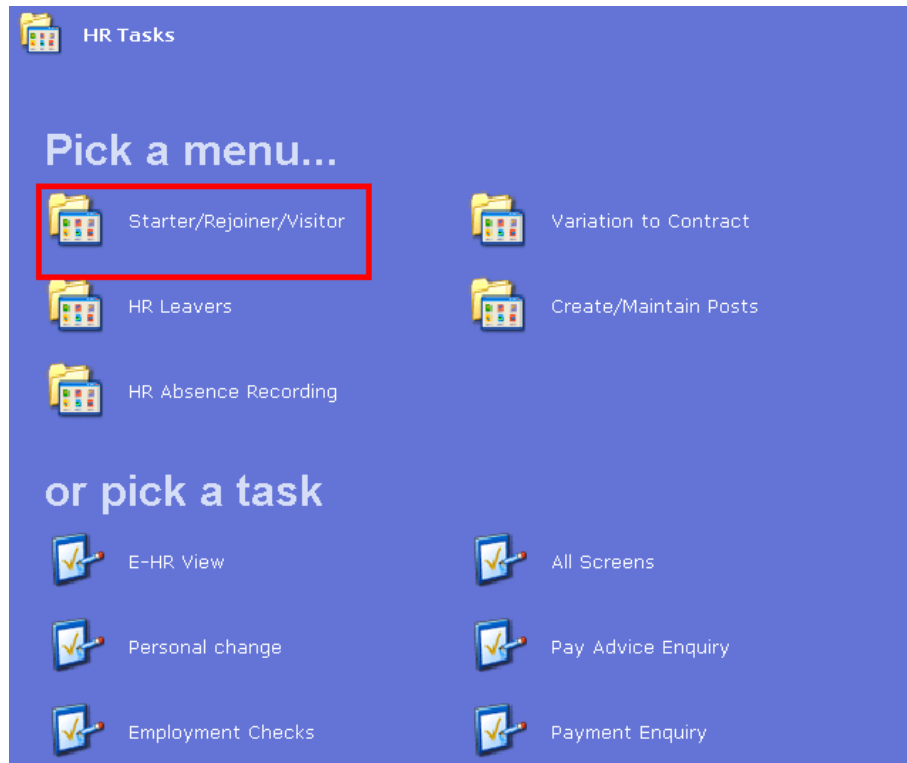
Seq	Pop Up Prompt
001	Please enter name of supervisor
002	Enter whether this is a Sch/ Dept/Div
003	Please enter name of signatory
004	Please enter RA/PA's tel number

- 8.7 Click in the first row and type the name of the visitor's supervisor.
- 8.8 Click in the second row and type in the if Sch/Dept/Div.
- 8.9 Click in the third row and type the signatory's name.
- 8.10 Click on the fourth row and type the signatory's telephone number.
- 8.11 Click on **Exit**.

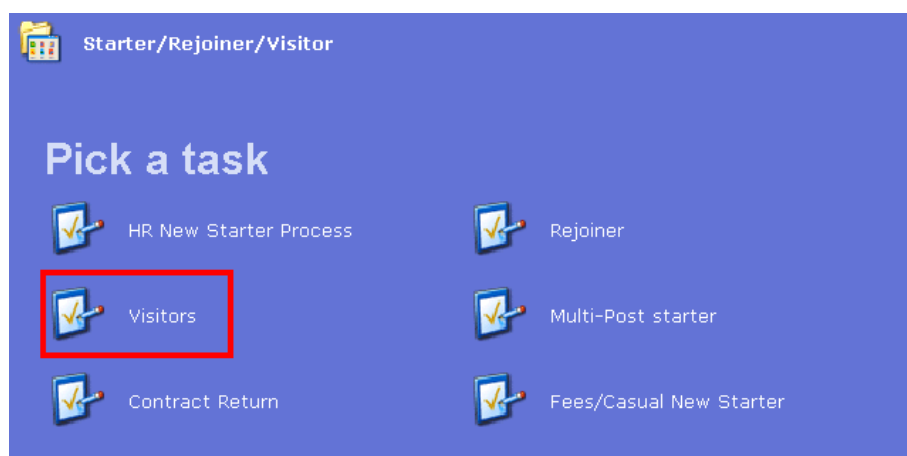
8.12 The visitor's letter should generate in **Word** and you can print as normal.

9 Returning Visitors

9.1 Move into the Visitor Task



9.2 Select Visitors



9.3 You will always need to find employees' records on the system. If you already know their staff number you can go straight to the task required.

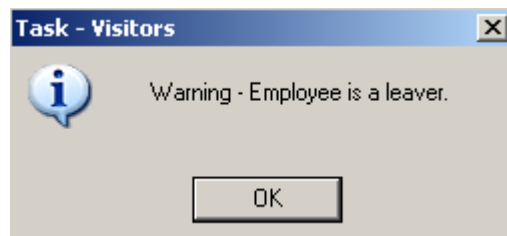
9.4 The following search form is made available

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

9.6 Entering either the Employee Number or Surname select search.

9.7 Select the appropriate staff member from the list

9.8 A warning screen will appear:



9.9 Click on OK – this identifies that this visitor is on the system but has left.

10 Personal Details data entry screen

10.1 The Personal Details screen should already be completed, check and update fields where necessary

10.2 Click on **User Fields**  User Fields

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

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

MD37G4A Narrative Table Search

Search

Narr Code

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

Exit

10.4 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

10.5 Click on the required Pay Point.

10.6 Click on **Exit**.

10.7 Click on  to move to the next data entry screen.


11 Relationship Summary data entry screen

11.1 Click on **Add** to enter the details of the visitor's next of kin.

11.2 Click on the down arrow in the **Code** field and select **NOK**.

11.3 **ENTER** past the **Emp No.** field.

11.4 **Window in** to the **Dets** field and complete the known personal details for the visitor's next of kin.

- 11.5 Click on the **Address** and **Telephone** fields to enter this information.
- 11.6 Click on **Exit**.
- 11.7 If you wish to add more than one next of kin contact repeat the steps in 3.1
- 11.8 Click on  to move to the next data entry screen.

12 Employment Detail data entry screen

Task - Visitors - Employment Detail

Session Edit View Other Process Tools Display Help

Employee

Dates

Original Start 28/09/1998 SG006 Conversion

Current Start 28/09/1998 SG006 Conversion

Termination 30/09/2009 LG036 End of Visitor status

To Staff Enter the employee's Current Start Reason or WINDOW to select

Probation

Additional

Service 11 Years 3 Days

Employee Type

Self Service Unit

Willing to Job Share

Notice Period

No Of Current Posts

Service Breaks User Fields Notes Empl. History

Enter the employee's Original Start Date ADD NUM MD4751A

- 12.1 Click in the **Current Start** field and the date from which their visit commences.
- 12.2 In the adjacent field to **Current Start**, window in and select **SG003 – Visitor Appointment**.


MD57G3 Dependency Selection

Seq	Code	Description	Score
001	LG0037	Retirement	
002	LG037	Visitor to Staff	
003	PJL004	Promotion	
004	PJL005	Internal Transfer (in dept)-Restructure	
005	PJL006	Int. Transfer (in dept)-Breakdown in Rel	
006	PJL007	Internal Transfer (in dept) - Other	
007	PJL008	Int. Transfer (in dept)-Flex. Working	
008	PJL009	Internal transfer (out dept)-Restructure	
009	PJL010	Int.Transfer (out dept)-Breakdown in Rel	
010	PJL011	Internal Transfer (out dept) - Other	
011	PJL012	Secondment	
012	PJL013	Acting Up	

Add Select Delete

Exit

- 12.3 Press **Enter**.


12.4 Click on  to move to the next data entry screen.


13 Post Holding History data entry screen

Seq	Start	End Date	Post	M	Status	N	Dtlis	Summary
001	01/09/2006	30/09/2009	DD00-VISIT	Y	PS009	N	Y	...
002	28/09/1998	31/08/2006	9999999999	N	PS009	N	Y	...

Buttons: Add, Change, Delete, Expand

Status Bar: Pseudo-Sequence Number for Index Paging | CHANGE | NUM | MD4757

 This screen will list each time the visitor has visited the University, with the start and end dates of each visit.

13.1 Click on  to move to the next data entry screen.

14 Current Post Holding data entry screen

- 14.1 Click on **Add** to enter the Current Post Holding data for the visitor.
- 14.2 Type in the **Start Date**.
 - ☛ Dates **MUST** be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.
- 14.3 Press **ENTER**.
- 14.4 Type the Visitor Post Number (for the appropriate school/dept) into the **Post** field.
- 14.5 Press **Enter**.
 - ❗ If you see a dialog box warning that the FTE is being exceeded click on **Exit**.
- 14.6 Click in the **Details** field and **Window in**.

MD47L3 Employee Post Holding Details

Detail

Post	KW04-VISIT	Visitor
Job	UNPAIDVIS	Unpaid Visitor
Employee Grade		
Post Grade	DEFAULT	SYSTEM DEFAULT GRADE

General Conditions Misc Grade Contract

Start 31/03/2010 SG001 New Appointment
End

Service In Post
Projected End

Post Main Flag ☐ Suspended ☐
Exc. from attracting Ee's Costs ☐

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

14.7 Click in **Post Main Flag** field and Type **Y**.

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

MD47L3 Employee Post Holding Details

Detail

Post	KW04-VISIT	Visitor
Job	UNPAIDVIS	Unpaid Visitor
Employee Grade		
Post Grade	DEFAULT	SYSTEM DEFAULT GRADE

General Conditions Misc Grade Contract

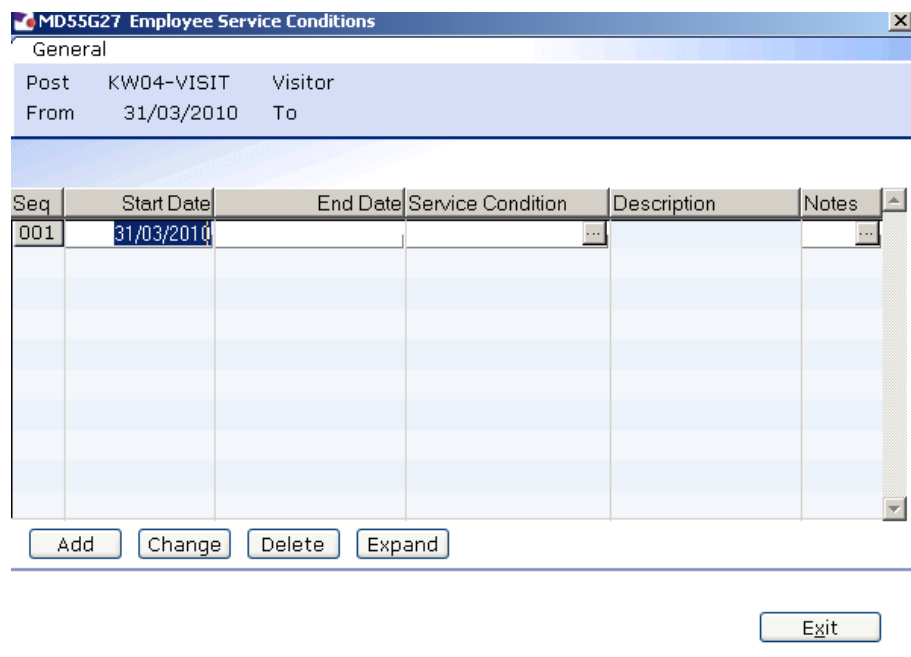
Service Cond ID UNPAIDVIS unpaid visitor
Source JOB
Position Status

Occupancy
Wk Pattern DEFAULT Default Work Pattern
Source POST

Contract Hours 0.00 Weekly Hours 00.0000
Source JOB FTE 1.0000

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

14.9 Window in to the **Service Cond ID** field



MD55G27 Employee Service Conditions

General

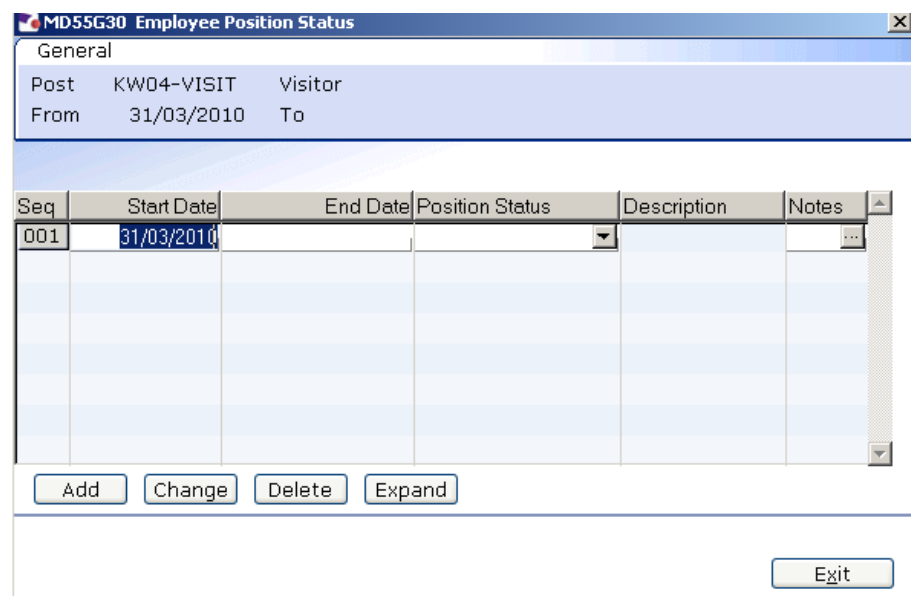
Post KW04-VISIT Visitor
From 31/03/2010 To

Seq	Start Date	End Date	Service Condition	Description	Notes
001	31/03/2010				

Add Change Delete Expand

Exit

- 14.10 Click on **Add** and press **Enter** three times to pull through the Service Conditions. The service condition should be **UNPAIDVIS**.
- 14.11 Click **Exit**.
- 14.12 **Window in the Position Status Field.** The following screen will appear:



MD55G30 Employee Position Status

General

Post KW04-VISIT Visitor
From 31/03/2010 To

Seq	Start Date	End Date	Position Status	Description	Notes
001	31/03/2010				

Add Change Delete Expand

Exit

- 14.13 Click on **Add**.
- 14.14 Press **Enter** twice to move to the **Position Status** field and display the drop down list.

Code	Desc	Long Description
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
PS009	VISITOR1	Visitor - Requires System Access
PS010	VISITOR2	Visitor - No System Access

- 14.15 Select either **VISITOR1** or **VISITOR2** (depending on if they requires access to systems).
- 14.16 Press **Enter** to move through the remaining fields and click **Exit**.
- 14.17 Leave the **Wk Pattern** field as Default.
- 14.18 Leave the **Contract Hours** field as 0.
- 14.19 Click on to the **Misc** tab.

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

- 14.21 Click on **Add** and press **Enter** twice.
- 14.22 Select the location from the **Location** field drop down list.
- 14.23 Press **Enter**.
- 14.24 **Window in** to the **Reason** field and select **SG003 Visitor Appointment**.
- 14.25 Press **Enter**.
- 14.26 Click **Exit**.
- 14.27 Click on the **Grade** tab.

MD47L17 Employee Location

General

Post KW04-VISIT Visitor

From 31/03/2010 To

Seq	Start Date	End Date	Location	Description	Source	Reason	Notes
001	31/03/2010		HIGHFIELD				

Add Change Delete Expand

Exit

i Do not complete this tab.

- 14.28 Click on the **Contract** tab.

General Conditions Misc Grade Contract

Redeployment Reason

Projected End Date

Contract Number


HESA Indicator

T/S Template Perf Management User Fields Salary Planning Notes

Exit

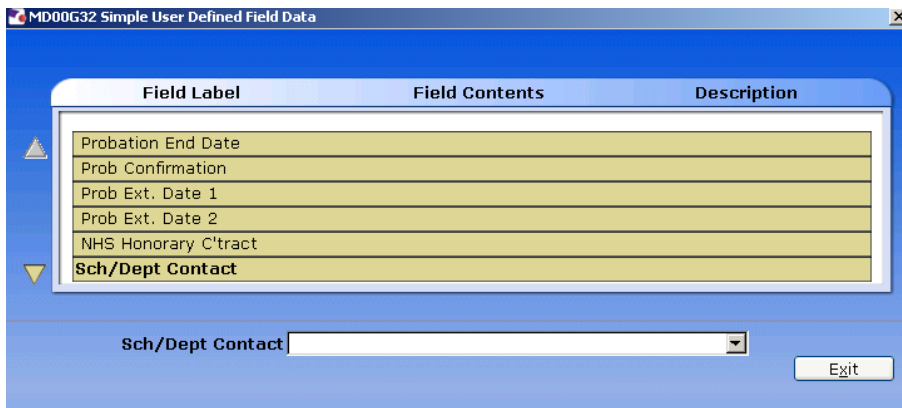
- 14.29 Click in the **Projected End Date** field.

14.30 Enter the date the visit is expected to finish.

14.31 Click on the **User Field** icon at the bottom of the screen  User Fields

14.32 Click in the **School/Dept Contact** field

14.33 Type the name of the **Contact**



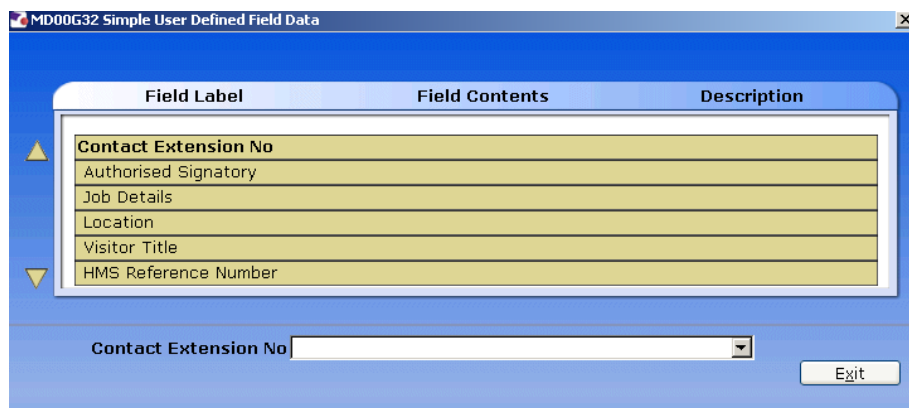
Field Label	Field Contents	Description
Probation End Date		
Prob Confirmation		
Prob Ext. Date 1		
Prob Ext. Date 2		
NHS Honorary C'tract		
Sch/Dept Contact		

Sch/Dept Contact

Exit

14.34 Press **Enter**

14.35 Type the **Contact Ext No** in the highlighted field



Field Label	Field Contents	Description
Contact Extension No		
Authorised Signatory		
Job Details		
Location		
Visitor Title		
HMS Reference Number		

Contact Extension No

Exit

14.36 Press **Enter**


14.37 Type the name of the **Authorised Signatory** in the highlighted field

Field Label	Field Contents	Description
Contact Extension No		
Authorised Signatory		
Job Details		
Location		
Visitor Title		
HMS Reference Number		

Authorised Signatory

Exit

14.38 Press **ENTER** and click on **Exit**.

14.39 Click on  to move to the next data entry screen.

15 Basic Pay Details data entry screen

Task - Visitors - Basic Pay Detail

Session Edit View Other Process Tools Display Help

Employee 2074524 : 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

Press WINDOW to select the structure unit the employee belongs to

CHANGE NUM MD49S2

15.1 Check that the **Pay Group** is set as **PSUB5**.

15.2 If not, window in and select **PSUB5**.

15.3 Ensure the **Pay method** is set as **Cheque**.

15.4 There are no more tabs to complete, click on **Save**.

16 Standard letters

Seq	Letter	Ver	Description	Let Opts	Copies
001	EMERITUS	001	Emeritus Professor	NOACT	1
002	WISEXTN	001	Visitor Extension	NOACT	1
003	VISIT-SO	001	Visitor - spin out	NOACT	1
004	VISITOR	001	Visitor	NOACT	1
005	VIS_NERC	001	Visitor NERC	NOACT	1
006	VIS_SUSU	001	Visitor SUSU	NOACT	1

Buttons: Add, Change, Delete, Expand, Exit

- 16.1 Click in the **Let Opts** field of the standard letter you want to produce
- 16.2 Click on the drop down and select **MERGE – Immediate print with manual changes**.

Seq	Letter	Ver	Description	Let Opts	Copies
001	EMERITUS	001	Emeritus Professor	NOACT	1
002	WISEXTN	001	Visitor Extension	NOACT	1
003	VISIT-SO	001	Visitor - spin out	NOACT	1
004	VISITOR	001	Visitor	NOACT	1
005	VIS_NERC	001	Visitor NERC	NOACT	1
006	VIS_SUSU	001	Visitor SUSU	NOACT	1

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

- 16.3 Click on **Exit**.
- 16.4 Select appropriate Post

Seq	Post	Start Date	End Date	Occ Type	Main
001	EMPLOYEE	31/03/2010			
002	KW04-VISIT	31/03/2010			Y
003					
004					
005					
006					
007					
008					
009					

Buttons: Add, Select, Delete, Exit

16.5 Select the latest hierarchy

Seq	Hierarchy	Eff Date
001	HR MAIN	01/11/2008
002	HR MAIN	01/09/2008
003	HR MAIN	01/08/2008
004	HR MAIN	01/04/2008
005	HR MAIN	14/01/2008
006	HR MAI Post Number	01/01/1940
007	HRMAIN01	01/01/1940
008	HRMAIN02	14/01/2008
009	HRMAIN03	01/04/2008

16.6 Complete the following form

Seq	Pop Up Prompt
001	Please enter name of supervisor
002	Enter whether this is a Sch/ Dept/Div
003	Please enter name of signatory
004	Please enter RA/PA's tel number

- 16.7 Click in the first row and type the name of the visitor's supervisor.
- 16.8 Click in the second row and type in the if Sch/Dept/Div.
- 16.9 Click in the third row and type the signatory's name.
- 16.10 Click on the fourth row and type the signatory's telephone number.
- 16.11 Click on **Exit**.

16.12 The visitor's letter should generate in **Word** and you can print as normal.