

**This work instruction was last updated: 10<sup>th</sup> May 2012**

## **HR Visitor to Staff (Main Payroll) Process**

- You will not be able to perform this task if payroll are in the process of running the month-end payroll (as the system will not allow you to change anyone's Pay Group during this process).

This Work Instruction describes the process where a person currently on ResourceLink as a Visitor moves into a Staff (main payroll) post.

When the contract for the new staff post is returned, you will need to complete the **Contract Returned** task and:

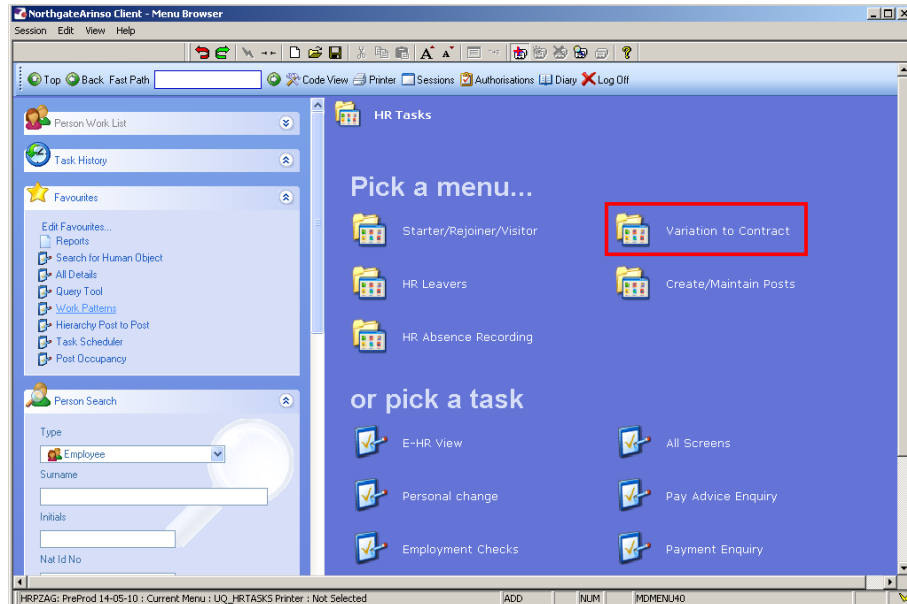
- Un-suspend on their new staff post

### **Table of Contents**

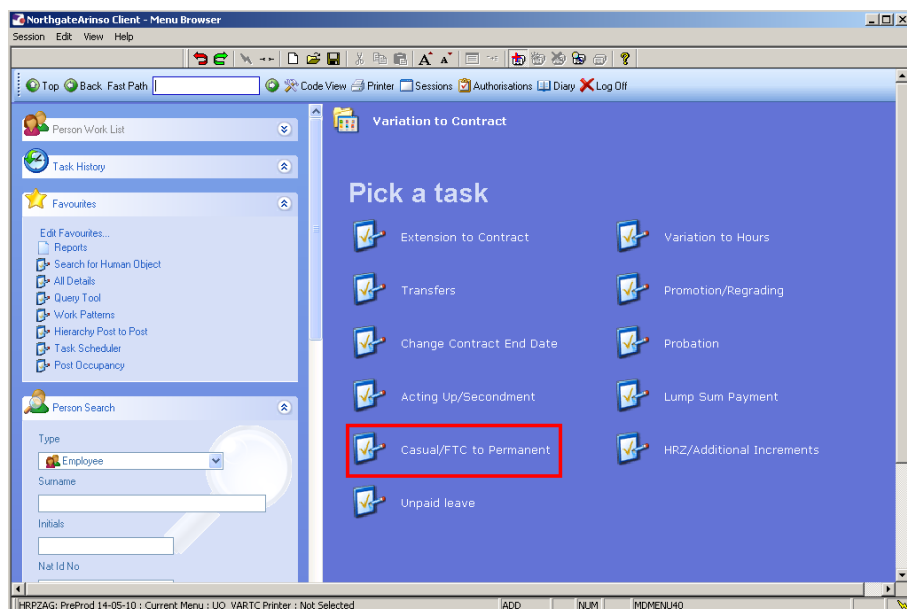
1	Entering a Visitor to Staff onto ResourceLink
2	Personal Details data entry screen
3	Equal Opportunities data entry screen.
4	Employee Work Permit data entry screen
5	Contract Details data entry screen
6	Basic Pay Details data entry screen
7	Current Post Holding data entry screen
8	Employment Detail data entry screen
9	Post Holding Costing data entry screen
10	Holiday Entitlement data entry screen
11	Asset Management
12	Fixed Pay Elements Summary data entry screen
13	Standard Letters

# 1 Entering a Visitor to Staff onto ResourceLink

## 1.1 ResourceLink HR Home Page > HR Tasks > Variation to Contract



## 1.2 ResourceLink HR Home Page > HR Tasks > Variation to Contract > Casual/FTC to Permanent



1.3 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.

1.4 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:

Sex:

Current Employee:

Previous Surname:

Known As:

Initials:

Nat. Ins. No.:

As at Date:

Add Search

Surname	Inits	Title	Emp Number	National ID Number	Start Date	Force

Select Exit Save List

Enter an Employee Number CHANGE NUM IMD55522

- 1.5 The Employee Number, Surname, search and select options are highlighted
- 1.6 Entering either the Employee Number or Surname select search.
- 1.7 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

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

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

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

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

**MD37G4A Narrative Table Search**

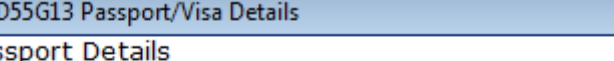
Search

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



MD55G13 Passport/Visa Details

Passport Details

Passport No

Expiry Date

Country Of Issue

2.7 Complete the 3 fields.

2.8 Once the details have been added, click on Exit (at the bottom).

2.9 Click onto User Fields


2.10 If you have added a certified copy of the staff members password to DocStore, then enter **Y** into the “**Cert. Passport**”, otherwise leave this blank.

Field Label	Field Contents	Description
Unique Identifier	A0000000113834	
Pay Point		
Trade Union Opt Out		
Res Passport Issued		
<b>Cert. Passport</b>	Y	Yes

Cert. Passport **Y**  
Yes

Exit

2.11 Press enter for it to accept the Y and then click on **Exit**.

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

### 3 Equal Opportunities data entry screen.

- 3.1 Some of the data required in the screen may already be completed. Check and complete data where necessary, especially HESA data in the User Fields section

Task - Casual/FTC to Permanent - Equal Opportunities Screen

Session Edit View Other Process Tools Display Help

Employee 2086506 : MS L LASTIC

General

Gender Female

Marital Status

Date Of Birth 31/10/1957 Age : 52 Years 6 Months

Current Start 01/04/2010 Service 1 Month 25 Days

Details

Ethnic Origin 11 White British

Country of Birth

Religion

Nationality/Citizenship GB United Kingdom

Occupational Group

Sexual Orientation

Personal Dets.

Disabled Flag ☐ Disability 1 97 Disability 2 XX First Aider ☐


User Fields Notes Health Details Special Aids

Incapacity Work Adaptations

Enter Ethnic Origin or press WINDOW to select (ETHNIC) CHANGE NUM MDSS512

- 3.2 Complete the following fields only:

Ethnic Origin  
Nationality/Citizenship  
Disabled Flag (if necessary)  
First Aider (if necessary)

- 3.3 Click on  User Fields to complete **HESA information**.

MD00G32 Simple User Defined Field Data

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

Date First App HEI

Exit

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

- 3.5 Click on **Previous Employment** and click on the drop down.

MD37G4A Narrative Table Search

Search

Narr Code

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

Exit

- 3.6 Press **Enter**.

MD37G4A Narrative Table Search

Search

Narr Code

Seq	Code	Desc	Long Description
001	01	Another HE	Another HEI in UK
002	02	HEIOversea	HEI in an overseas country
003	03	Other Ed	Other Education Institution in UK
004	04	Oth ED	Other Education Institution in Overseas
005	05	RsInstit	Research Institution in the UK
006	06	Res Ins	Research Institution Overseas
007	07	Student UK	Student UK
008	08	St Oversea	Student in Overseas Country
009	09	NHS/GEN	NHS/General medical or gen dental

Add Select Delete

Exit

- 3.7 Scroll down the list and click on the previous employment of the employee.
- 3.8 Click on the drop down in the **Previous HEI** field if the employee has previously worked at another higher education institute.
- 3.9 Press **Enter**.



Seq	Code	Desc	Long Description
001	0001	0001	The Open University
002	0002	0002	Cranfield University
003	0003	0003	Royal College of Art
004	0004	0004	College of Guidance Studies
005	0006	0006	The Royal College of Nursing
006	0007	0007	Bishop Grosseteste College
007	0008	0008	Bretton Hall College of HE
008	0009	0009	Buckinghamshire New University
009	001	001	The Open University

3.10 Scroll down the list and click on the employee's previous HEI.

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

3.12 Press Enter.

Seq	Code	Desc	Long Description
001	01	Doctorate	Doctorate
002	02	Oth HghDeg	Other Higher Degree
003	03	PGCE	PGCE
004	09	Oth PostGr	Other Postgraduate Qualification
005	11	FirstDegree	First Degree
006	12	FrstDegQT	First Degree with Qualified Teacher Stat
007	19	Oth Qual	Other Qualifications at First Degree Lev
008	21	Dipof HE	Diploma of HE
009	22	HND/HNC	HND/HNC

3.13 Scroll down the list and click on the Highest Academic Qualification that the employee holds.

3.14 Click on the drop down of the **Academic Disp 1** field.

3.15 Press Enter.

Seq	Code	Desc	Long Description
001	A000	A000	A000,Medicine and Dentistry
002	A100	A100	A100,Pre-clinical Medicine
003	A200	A200	A200,Pre-clinical Dentistry
004	A300	A300	A300,Clinical Medicine
005	A400	A400	A400,Clinical Dentistry
006	A900	A900	A900,Others in Medicine and Dentistry
007	A990	A990	A990,Medicine and Dentistry not elsewhere
008	B000	B000	B000,Subjects allied to Medicine
009	B100	B100	B100,Anatomy, Physiology and Pathology

- 3.16 Scroll down the list and click on the 1<sup>st</sup> Academic Discipline of the employee.
- 3.17 Click on the drop down of the **Academic Disp 2** field.
- 3.18 Press Enter.

Seq	Code	Desc	Long Description
001	A000	A000	A000,Medicine and Dentistry
002	A100	A100	A100,Pre-clinical Medicine
003	A200	A200	A200,Pre-clinical Dentistry
004	A300	A300	A300,Clinical Medicine
005	A400	A400	A400,Clinical Dentistry
006	A900	A900	A900,Others in Medicine and Dentistry
007	A990	A990	A990,Medicine and Dentistry not elsewhere
008	B000	B000	B000,Subjects allied to Medicine
009	B100	B100	B100,Anatomy, Physiology and Pathology

- 3.19 Scroll down the list and click on the 2nd Academic Discipline of the employee.
- 3.20 Click on the drop down in the **Regulatory Body** field.
- 3.21 Press Enter.

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

- 3.22 Scroll down the list and click on the employee's Regulatory Body.
- 3.23 Leave the **Date Left HEI** field blank – when a leaver action is entered for this employee the screen will auto complete.
- 3.24 Leave the **Leaving Destination** blank.
- 3.25 Click in the drop down of the **Active Last Res** field.
- 3.26 Press Enter.

Seq	Code	Desc	Long Description
001	1	CatAA*C	Category A,A* or C selected for assessmt
002	2	CatAA*C	Category A,A*orC Not Selected for assesm
003	3	Emplyd	Employed by the rep institution on311007
004	9	NotEmployd	Not employed by the institution 311007
005	X	Default	Default

- 3.27 Click on the description that applies to the employee.
- 3.28 Click in the drop down in the **Unit of Assessment** field.
- 3.29 Press Enter.

MD37G4A Narrative Table Search

Search

Narr Code

Seq	Code	Desc	Long Description
001	02	Cancer Std	Cancer Studies
002	04	Hosp Based	Other Hospital Based Clinical Subjects
003	08	Prim Care	Primary Care and Other Community Based
004	11	Nursing	Nursing and Midwifery
005	12	AHP	Allied Health Professions and Studies
006	14	Bio Scienc	Biological Sciences
007	17	Earth Sys	Earth Systems & Environmental Sciences
008	18	Chemistry	Chemistry
009	19	Physics	Physics

Add Select Delete

Exit

- 3.30 Scroll down the list and click on the Unit of assessment that applies to this employee.
- 3.31 When you have completed all the HESA fields that apply to this employee, click on **Exit**.
- 3.32 Moved the next required screen

## 4 Employee Work Permit data entry screen

- 4.1 Only complete this screen if the employee requires a work permit/visa. If this does not apply, move to the next required screen

- ☛ Please see the work instruction Creating and Maintaining Work Permit & Visa Information

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

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

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

- 4.3 Moved the next required 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

Contract Type CHANGE NUM MD4757

The screenshot shows a software interface titled "Task - Casual/FTC to Permanent - Maintain Employee Contract Detail". At the top is a menu bar with "Session", "Edit", "View", "Process", "Tools", "Display", and "Help". Below the menu is a toolbar containing various icons for file operations (like save, open, print), editing (undo, redo, delete), and navigation. The main area has a blue header bar displaying "Employee 2086506 : MS L LASTIC". Underneath, there's a "General" tab section with a "Contract Type" label followed by a dropdown menu showing "...". A large table occupies most of the screen space. Its columns are labeled: "Seq", "Contract No", "Start Date", "End Date", "Contract Type", "Po...", "UDFs", and "Notes". Each column except "Seq" has a small dropdown arrow at its right edge. The table body is currently empty. At the bottom left of the table area, there are three buttons: "Add", "Change", and "Delete". The very bottom of the image shows a status bar with fields for "Pseudo-Sequence Number for Index Paging", "CHANGE", "NUM", and "MD4757".

Page 14 of 48

5.3 ResourceLink will generate a **Contract Number**.

5.4 Press **ENTER**.

5.5 Enter the **Start date** of the Fixed Term Contract.

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

5.6 Press **ENTER**.

5.7 **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

- 5.8      Select the **FTC01POSTA** Contract Type.
- i*      FTC01POSTB is used for staff with an FTC on a second post (see **Multi Post Starter** work instruction)
- 5.9      Press **Enter**.
- 5.10     Move the next required screen



## 6 Basic Pay Details data entry screen

### 6.1 Window into the Pay Group field

Task - Casual/FTC to Permanent - 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

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

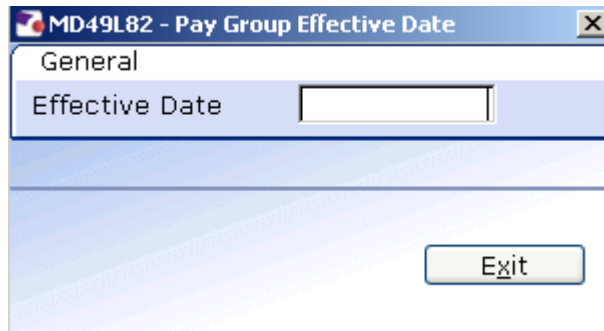
### 6.2 Click on PSUB1 Staff

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

### 6.3 Click on PSUB1 Staff

### 6.4 Press Enter



The screenshot shows a Windows-style dialog box titled "MD49L82 - Pay Group Effective Date". It has a "General" tab selected. Inside the dialog, there is a label "Effective Date" followed by an empty text input field. At the bottom right of the dialog is an "Exit" button. The background of the dialog has a light blue gradient with diagonal lines.

- 6.5 In the **Effective Date** field enter the date that the Visitor starts their Staff Post (when they move onto the main payroll).
- 6.6 Press **Enter**.
- 6.7 Moved the next required screen

## 7 Current Post Holding data entry screen

- 7.1 This screen will contain a row for the Visitor post that this person is already attached to. To view further information on their existing Visitor post window into the **Summary** field on that row
- 7.2 Make a note of the **start date of the Visitor post** – you will need it on the next screen

Seq	Start	Post	M	Grade	Status	N	Detail	Summary
001	01/04/2010	DD00-VISIT	Y	DEFAULT	PS009	N	Y	

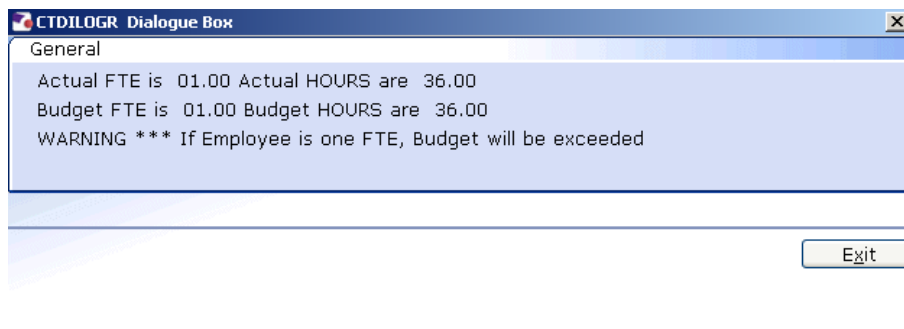
- 7.3 You will need to add the new staff post that the visitor is moving into. When the contract is signed and returned for the new post you will need to complete the **Contract Returned** task to un-suspend their new staff post.
- 7.4 Click on **Add** to add the new staff post the visitor is moving into.

Seq	Start	Post	M	Grade	Status	N	Detail	Summary
001	01/04/2002	0000002206	Y	GRADE 6	PS006	N	Y	
002								...

- 7.5 Enter the **Start Date** of the new staff post in the **Start field**.
- 7.6 Press **Enter**.
- 7.7 In the **Post** field enter the ID of the post the employee is moving into.
- 7.8 Press **Enter**.

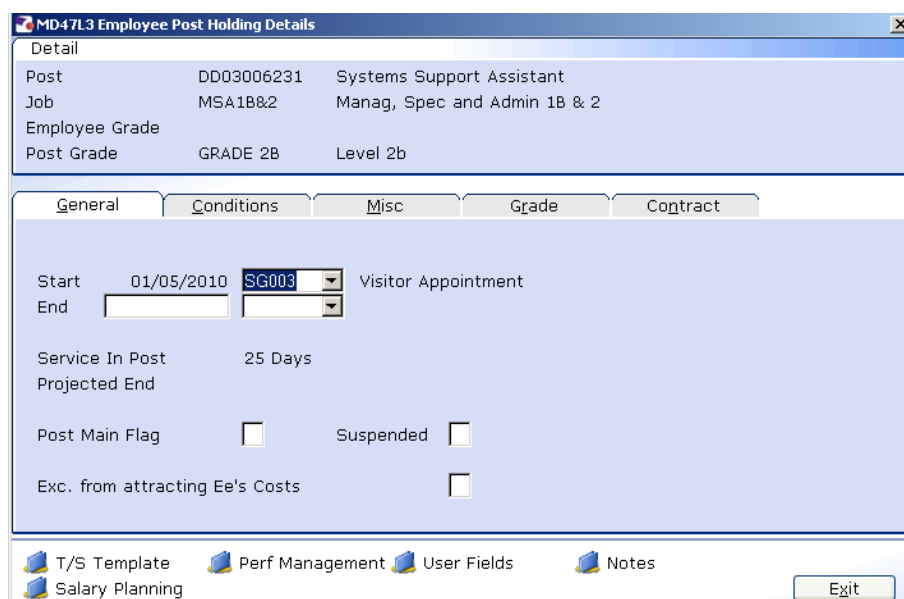


- 7.9 You will never want to copy details from another post, press enter to move past this screen.



- 7.10 You can only place multiple staff in one post if it is either maternity cover or a job share otherwise a new post has to be created, if this is the case click on **Exit** to move past the screen above.

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



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

- 7.13 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

7.14 Click on **LG037 – Visitor to Staff**

7.15 Press **Enter**.

Post Main Flag

7.16 If this new Post will be the employees only or main post, you will need to **Y** flag this field.

MD47L27 Optional Closure of Post

General

This Procedure will automatically update the End Date and Leaving Reason for the existing Main Post, Continue ?

Buttons: Yes, No

7.17 Click on **Yes** – this will automatically end the Visitor post the day before the employee starts their new staff post.

7.18 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.

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

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

MD55G27 Employee Service Conditions

Task - Casual/FTC to Permanent

7.23 Click **Exit**.

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

Seq	Start Date	End Date	Position Status	Description	Notes

Buttons: Add, Change, Delete, Expand, Exit

7.25 Click on **Add**.

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

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

Buttons: Add, Change, Delete, Expand, Exit

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

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

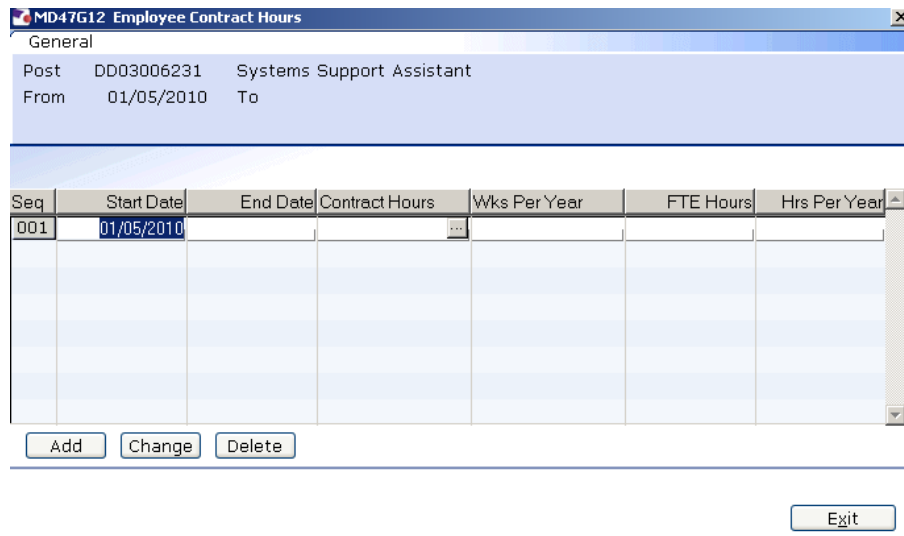
7.29 **Window in to the Wk Pattern field.** The following screen will appear:

- 7.30 Click on **Add** and enter through the fields.
- 7.31 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.
- 7.32 Press **Enter**.
- 7.33 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

- 7.34 Enter the appropriate number into the **Start Day** field.
- 7.35 **Window in** to the **Reason** field and select **LG037 – Visitor to Staff**.
- 7.36 Press **Enter** and **Exit**.
- 7.37 **Window in** to the **Contract Hours** field.





MD47G12 Employee Contract Hours

General

Post DD03006231 Systems Support Assistant  
From 01/05/2010 To

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

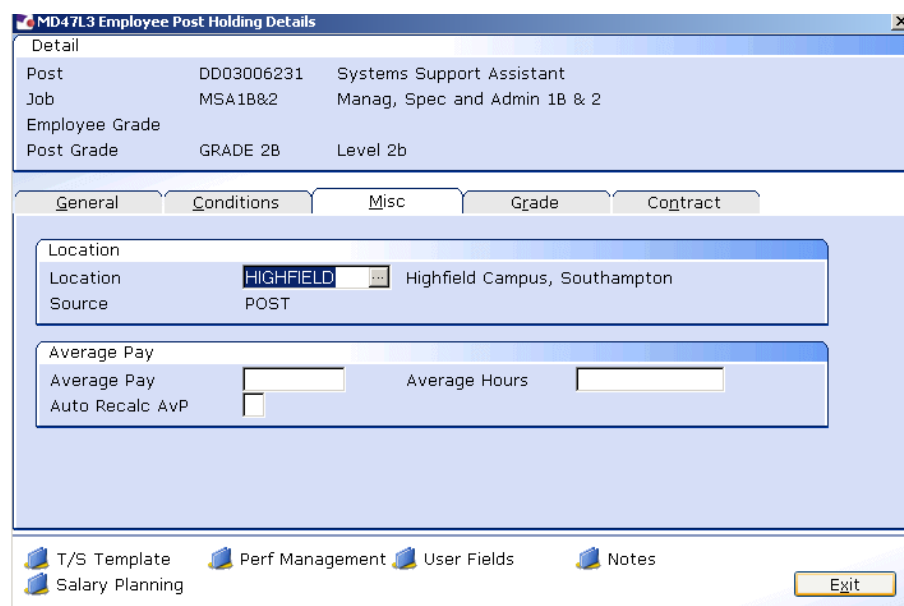
Add Change Delete

Exit

- 7.38 Click on **Add** to bring through the **Start Date** and press **Enter** twice.
- 7.39 Enter the weekly working hours in the **Contract Hours** field.
- 7.40 Press **Enter**.
- 7.41 If the employee will be working these hours less than 52.143 weeks a year then enter the **Wks Per Year** that they will be working these hours. If not then leave this field blank.

☛ Full year = 52.143 weeks

- 7.42 Press **Enter**
- 7.43 Click on **Exit**
- 7.44 Click on to the **Misc** 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

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

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

MD47L17 Employee Location

General

Post DD03006231 Systems Support Assistant

From 01/05/2010 To

Seq	Start Date	End Date	Location	Description	Source	Reason	Notes

Add Change Delete Expand

Exit

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

7.47 If the default location is incorrect, select the location from the **Location** field drop down list.

7.48 Press **Enter**.

7.49 **Window in to the Reason field and select LG037.**

7.50 Press **Enter**.

7.51 Click **Exit**.

7.52 Click on the **Grade** 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

Pay Grade GRADE 2B Level 2b

Source EMPPOST

Start Date 01/05/2010

End Date

Point

Point Amount

Point Rate

T/S Template Perf Management User Fields Notes

Salary Planning

Exit

7.53 Window in to the **Pay Grade** field.

MD47G41 Employee Spinal Grade History

General

Post DD03006231 Systems Support Assistant

From 01/05/2010 T.

Seq	Start Date	End Date	Grade	Change Reason	Source	Grade	Point	N
001	01/05/2010		GRADE 2B	POSTPL	POSTGD			

Point Rate Enh.Rate Point Amount

Override Date Override Reason

Override Step Carry Forward

Bar Point Current Bar Point 19

Add Change Delete Expand

Exit

7.54 The **Grade** will pull through from the post, however if this is wrong it can be overwritten in this screen.

7.55 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 Consultant)
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

Scroll down the list and select the correct grade or click on the off scale equivalent grade

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

7.57 Press **Enter**.

7.58 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 above (**LG037**).

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	

Buttons: Add, Select, Delete, Exit

7.59 **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

Seq	Point	Value
001	13	18117.00
002	14	18643.00
003	15	19185.00
004	16	19743.00
005	17	20327.00
006	18	20938.00
007	19	21565.00
008	20	22236.00
009	21	22879.00
010	22	23566.00

Buttons: 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.

**Annual increments:**

**Note:** For most service conditions, the system will automatically award an increment on the next 1<sup>st</sup> 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 1<sup>st</sup> 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 on the next page.**

**So, if you are entering a new starter to the University who is starting between 1<sup>st</sup> August and 31<sup>st</sup> January then you can safely leave the “Override date” field blank as they will have been in post for over 6 months by 1<sup>st</sup> August and should receive an additional 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 1<sup>st</sup> August (i.e. anyone starting after 1<sup>st</sup> 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 1<sup>st</sup> 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 1<sup>st</sup> August).

**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 1<sup>st</sup> 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.

7.60 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.

Seq	Bar Point	Removed	Reason	N	Reason
001	19			N	
002	20			N	
003	21			N	
004	22			N	
005	23			N	
006	24			N	
007	25			N	

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

7.62 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

- 7.63 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.
- 7.64 Click on **Exit**.
- 7.65 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

- 7.66 Press **Enter** to move through the remaining fields and click **Exit**.
- 7.67 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

- 7.68 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.

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

**MD47L3 Employee Post Holding Details**

Detail

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

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.

- 7.70 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 post.

**MD47G73 Employee Contracts Selection**

General

Employee 2086506 MS L LASTIC  
Post DD03006231  
From 01/05/2010 To

Seq	Contract No	Start Date	End Date	Contract Type

Add Select Delete Expand

Exit

☛ If they have more than 1 FTC ensure you pick the correct contract for that post.

- 7.71 If the post is HESA returnable type **Y** into the **HESA Indicator** field.

- 7.72 Press **ENTER** and click on **Exit**.



Task - Casual/FTC to Permanent - Termination Options

Session Edit View Process Tools Display Help

Termination Options

General

Fixed P/E Automatically Closed Y

View Fixed PE Before Update N

View Fixed PE After Update N

Temp P/E Automatically Closed N

View Temp PE Before Update N

View Temp PE After Update N

Training Automatically Closed Y

View Training Before Update N

View Training After Update N

Terminate Clocking Details Y

Set Operator Obsolete Y

Enter "Y" to view fixed pay elements prior to update CHANGE NUM MD47518

7.73 The screen above appears because you are ending the visitor post. Click



Task - Casual/FTC to Permanent - 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	DD03006231	Y	GRADE 2B	PS001	N	Y	...

Add Change Delete Expand

Post Linking


Pseudo-Sequence Number for Index Paging CHANGE NUM MD47518

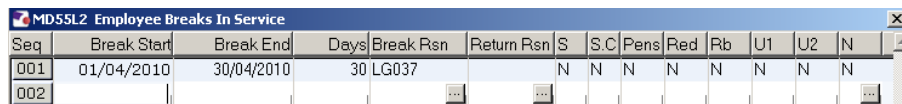
7.74 The employee's existing visitor post and the post they are transferring into will now appear on the **Current Post Holding** screen.

- ① When the employee returns their contract on the staff post they are moving into, you will need to un-suspend their new staff post. See the **Contract Return task**.


7.75 Moved the next required screen



- 8.6 Click on **Add**
- 8.7 In the **Break Start** field enter the start date of the **Visitor** post  
 You may need to refer to the **Current Post Holding** screen to get this information
- 8.8 Press **Enter**.
- 8.9 In the **Break End** field enter the end date of the Visitor post. (This will be the day before the employee starts in the Main Payroll post).
- 8.10 Press **Enter**.
- 8.11 The **Days** field will then auto populate with the number of days break in service
- 8.12 Press **Enter**.
- 8.13 In the **Break Rsn** field, window in and select reason **LG037 Visitor to Staff**
- 8.14 Press **Enter**
- 8.15 In the Return Rsn field, window in and select reason **LG037 Visitor to Staff**
- 8.16 Press **Enter**.
- 8.17 Enter all the way through to the end of the row.



Seq	Break Start	Break End	Days	Break Rsn	Return Rsn	S	S.C	Pens	Red	Rb	U1	U2	N
001	01/04/2010	30/04/2010	30	LG037		N	N	N	N	N	N	N	N
002													

- 8.18 Click on **Exit**  
 Ensure you have also completed the **To Staff** field with the date the employee starts in their main payroll post.
- 8.19 Moved the next required screen



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

9.4 Press **Enter**.

Employee 2086506 : MS L LASTIC

General

Post DD03006231 Systems Support Assistant

Start Date 01/05/2010 End Date

Seq Start Date End Date Detail Notes

Add Change Delete

9.5 Click on **Add**

9.6 In the **Start Date** field enter the date of when the employee starts in this new staff post.

9.7 Press **Enter**.


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

MD49G12 Costing Details

Seq Cost Centre Ee's % Er's %

Add Change Delete Expand

Exit

- 9.9 Click on **Add**.
- 9.10 Enter the **Cost Centre** number (Sub Project Code- starts with 5 )that this post is to be paid from. Press **Enter**.
- 9.11 In the **Ee's** field enter the percentage that this post is to be paid from this cost centre e.g. 100
- 9.12 In the **Er's** field enter the percentage that this post is to be paid from this cost centre e.g. 100
- 9.13 Press **Enter**.
- 9.14 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%.
- 9.15 Click on **Exit** .
- 9.16 Press **Enter**.
- 9.17 Moved the next required screen

## 10 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

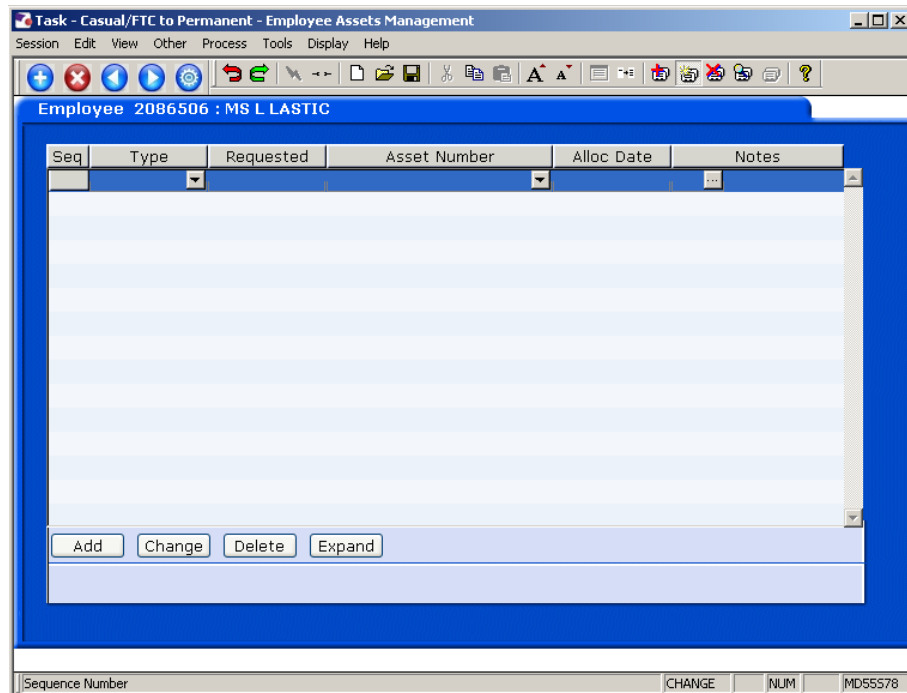
Work Pattern

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

- 10.1 Click on **Add**
- 10.2 In the **Start Date** field, enter the date the employee starts in the new staff post.
- 10.3 Press **Enter**.
- 10.4 In the **End Date** field either enter the end of the holiday year, **30<sup>th</sup> September** or if they are on a FTC and this ends sooner, enter the projected end date.
- 10.5 Press **Enter** through to the end of the row – the entitlement will automatically calculate.
- 10.6 Moved the next required screen



## 11 Asset Management

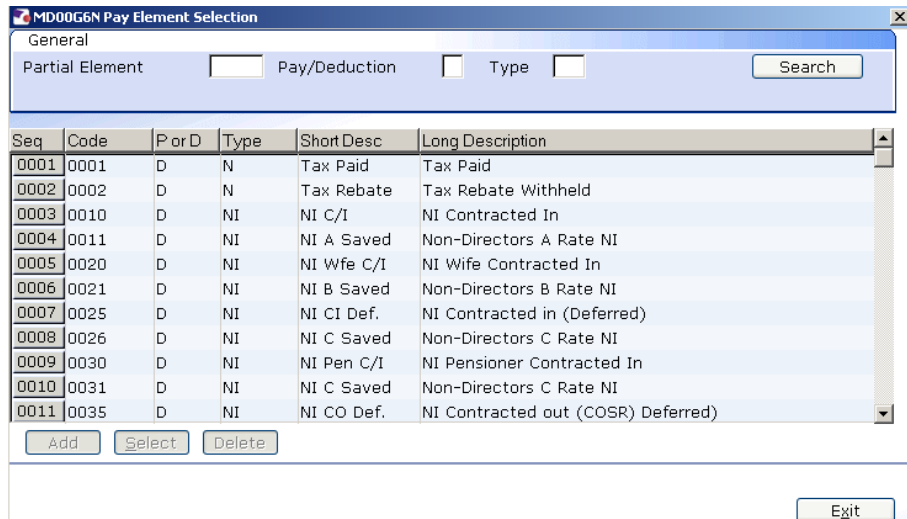


- 11.1 Click on **Add** if the employee is to be assigned particular assets to the staff post they are moving into e.g. a laptop
- 11.2 Select the asset type from the drop down list.

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.
- 11.3 Press **Enter** and amend the date requested if necessary.
    - ☛ Dates **MUST** be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.
  - 11.4 Enter through the rest of the fields on the row.
  - 11.5 Moved the next required screen






MD00G6N Pay Element Selection

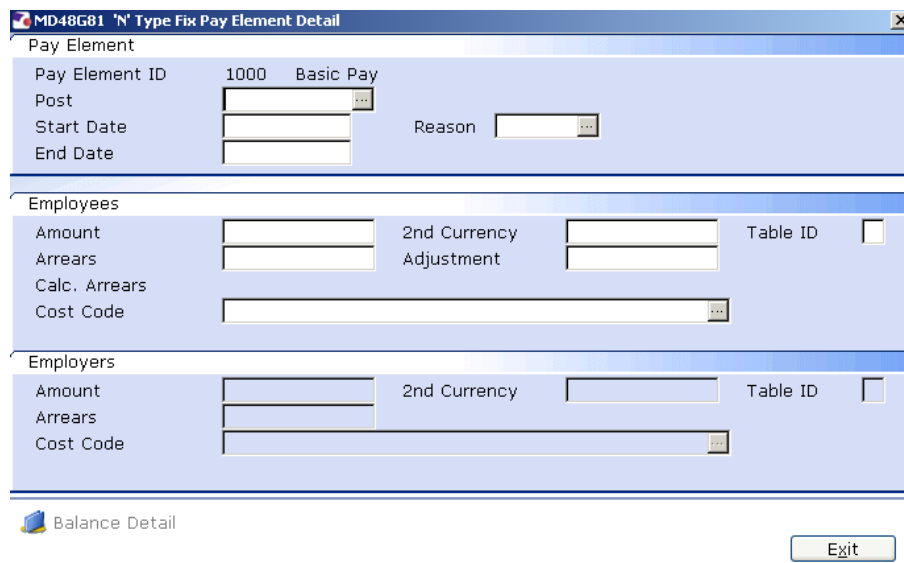
General

Partial Element  Pay/Deduction ☐ Type

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.



MD48G81 'N' Type Fix Pay Element Detail

Pay Element

Pay Element ID 1000 Basic Pay

Post

Start Date  Reason

End Date

Employees

Amount  2nd Currency  Table ID ☐

Arrears  Adjustment

Calc. Arrears


Cost Code

Employers

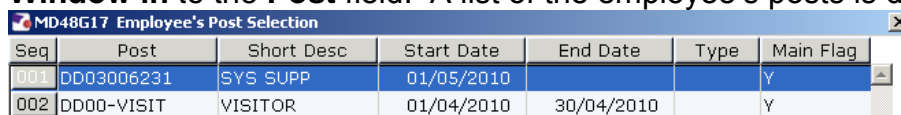
Amount  2nd Currency  Table ID ☐

Arrears

Cost Code

 Balance Detail

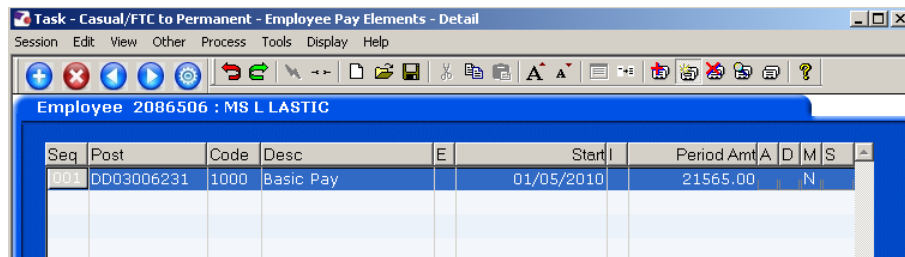
- 12.5 **Window in** to the **Post** field. A list of the employee's posts is displayed.



Seq	Post	Short Desc	Start Date	End Date	Type	Main Flag
001	DD03006231	SYS SUPP	01/05/2010			Y
002	DD00-VISIT	VISITOR	01/04/2010	30/04/2010		Y

- 12.6 Click on the new staff 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 **LG037 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.



Seq	Post	Code	Desc	E	Start	Period	Amt	A	D	M	S
001	DD03006231	1000	Basic Pay		01/05/2010		21565.00		N		

- 12.13 Click on **Add** and repeat this process for each Fixed PE the employee is to continuously receive each month for the staff post they are moving to.
- 12.14 Save move to the standard letters.

## 13 Standard Letters

- 13.1 Click in the **Let Opts** field of the standard letter you want to produce for the new post the employee is moving to.

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	NOACT	1
007	TTP	001	Temporary to Permanent	NOACT	1

Add Change Delete Expand

Exit

- 13.2 Click on the drop down and select **MERGE – Immediate print with manual changes**.

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	NOACT	1
007	TTP	001	Temporary to Permanent	NOACT	1

Add Change Delete Expand

Exit

- 13.3 Click on **Exit**.

**DRT125EW Employee Post Holding**

General

Select Employee Post Holding

Seq	Post	Start Date	End Date	Occ Type	Main
001	EMPLOYEE	01/04/2010			
002	DD00-VISIT	01/04/2010	30/04/2010		Y
003	DD03006231	01/05/2010			Y
004					
005					
006					
007					
008					
009					

Add Select Delete

Exit

#### 13.4 Select the latest Hierarchy

**DRT533EW Complex Post Structure Selection**

General

Select Post Structure Unit

Seq	Hierarchy	Eff Date
001	HR MAIN	01/11/2008
002	HR MAIN	01/09/2008
003	HRMAIN05	01/09/2008
004	HRMAIN06	01/11/2008
005	HRMAIN07	01/05/2009
006	HRMAIN08	01/01/1940

Add Select Delete

Exit

#### 13.5 Select the appropriate grade.

Seq	Grade	Start Date	End Date
001	GRADE 2B	01/05/2010	

Buttons: Add, Select, Delete, Exit

13.6 Complete the following

Seq	Pop Up Prompt
001	Please enter the fte & as shown on RL
002	Enter whether full or part time
003	please enter amount/no of points
004	Enter name contact Pers Asst /Recr Asst
005	Employee to report to (building no):
006	Employee to report to (room no):

Buttons: Add, Change, Delete, Exit

13.7 The screen will display the contracted hours for all posts the employee holds. Click on the new post contract hours.

13.8 Click on **Exit**.

Mail Merge In Progress

- 13.9 The New Contract for the **new staff post** should generate in **Word**. You can make manual changes and print as normal.
- 13.10 You will need to manually update the **Continuous Employment** section on the contract that is generated:

employment :

Date of start of  
"Continuous Employment" : 03/07/2006

Date of expiry of

- ☛ Be sure to update this section on **both** copies of the Contract of Employment that are generated.
- 📘 Remember: When the contract for the new post is returned, you will need to complete the **Contract Returned** task and:
  - Un-suspend on their new post