Temporary Employment Service

1 Introduction to structure

Trent's organisation structure is made up of Units, Posts, Positions and Contracts.

Organisation Structure

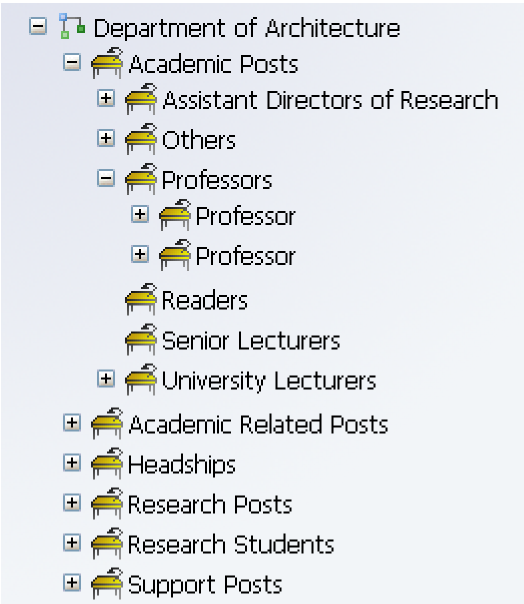
The organisation structure is the set of interconnected parts that represent the University of Cambridge as a whole. Most users will only see the University of Cambridge Organisation. There is also a Pensioners organisation which will be accessible to some users.

Unit

A unit is an organisation structure component that is made up of subordinate components including other units and posts. For example Colleges are a unit and each individual college – Christ's, Churchill, - a unit within this main unit.

Post

Within the Faculties and Departments are Posts. There are three levels of posts within the structure.



This screen displays the Department of Architecture

Level 1 posts are Academic, Academic Related, Headships, Research, Research Students and Support

Level 2 posts are shown below this – Assistant Directors, Others, Professors, Readers, Senior Lecturers, University Lecturers

Level 3 posts are the 2 Professor Posts that exist within the Classics Faculty

Position

A position is a location in the Organisation in which a person can be placed. If the chair icon is blue the position is occupied.

If the chair icon is green it indicates that the position is vacant and as yet unoccupied

If the chair icon is red it indicates that the position is vacant and has a recruitment requisition attached to it (no red chairs are visible at present)

Employee

Each employee within the University that is attached to the structure will be shown with this icon.

People are attached to the structure via a position and a contract is created.

A contract within Trent is not a contract of employment, but a piece of data which binds an employee to a payroll

2 Explorers

There are two explorers that you can use. The Organisation Explorer and the Mini Explorer.

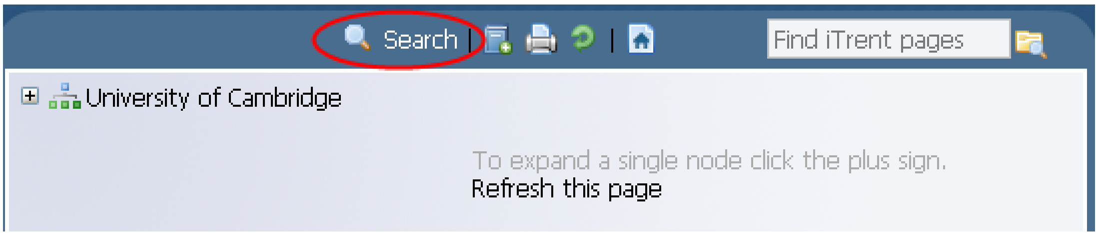
The whole area of the Organisation Structure is controlled using effective dates. Information that is added, amended, or deleted is recorded as a change on that specific date. It is important that the date selected when using the organisation explorer is the correct one, as the organisation will differ from day to day.

2.1 Organisation Explorer

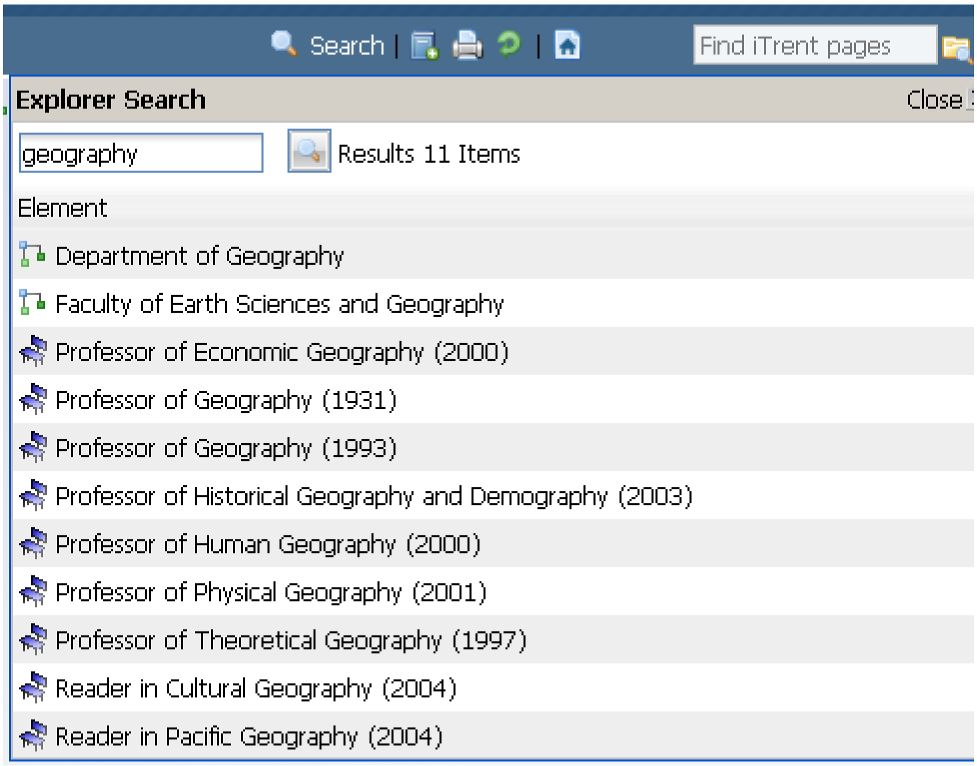
You can use the Organisation explorer to display the units, posts and positions within the University and how they have been organised within Trent.

1. Select University of Cambridge
2. Select Organisation Explorer
3. Enter the correct effective date.
4. The top level of the organisation is displayed first with a plus icon next to it 

.
The plus sign indicates that there are further items to be displayed under this node.
5. Click on the search button to enter the faculty or department you wish to locate.



For example entering "Geography" will return search results as displayed below



6. Select the required Faculty or Department.

When viewing the structure in the organisation explorer, the appearance of a plus icon next to any element indicates hidden items below the level displayed.

Clicking the plus icon will expand the diagram to display the subordinate components. When the selected node is fully expanded, the plus icon changes to a minus icon

Clicking the minus icon condenses the node again.

When you reach the node that you are interested in, click on it.

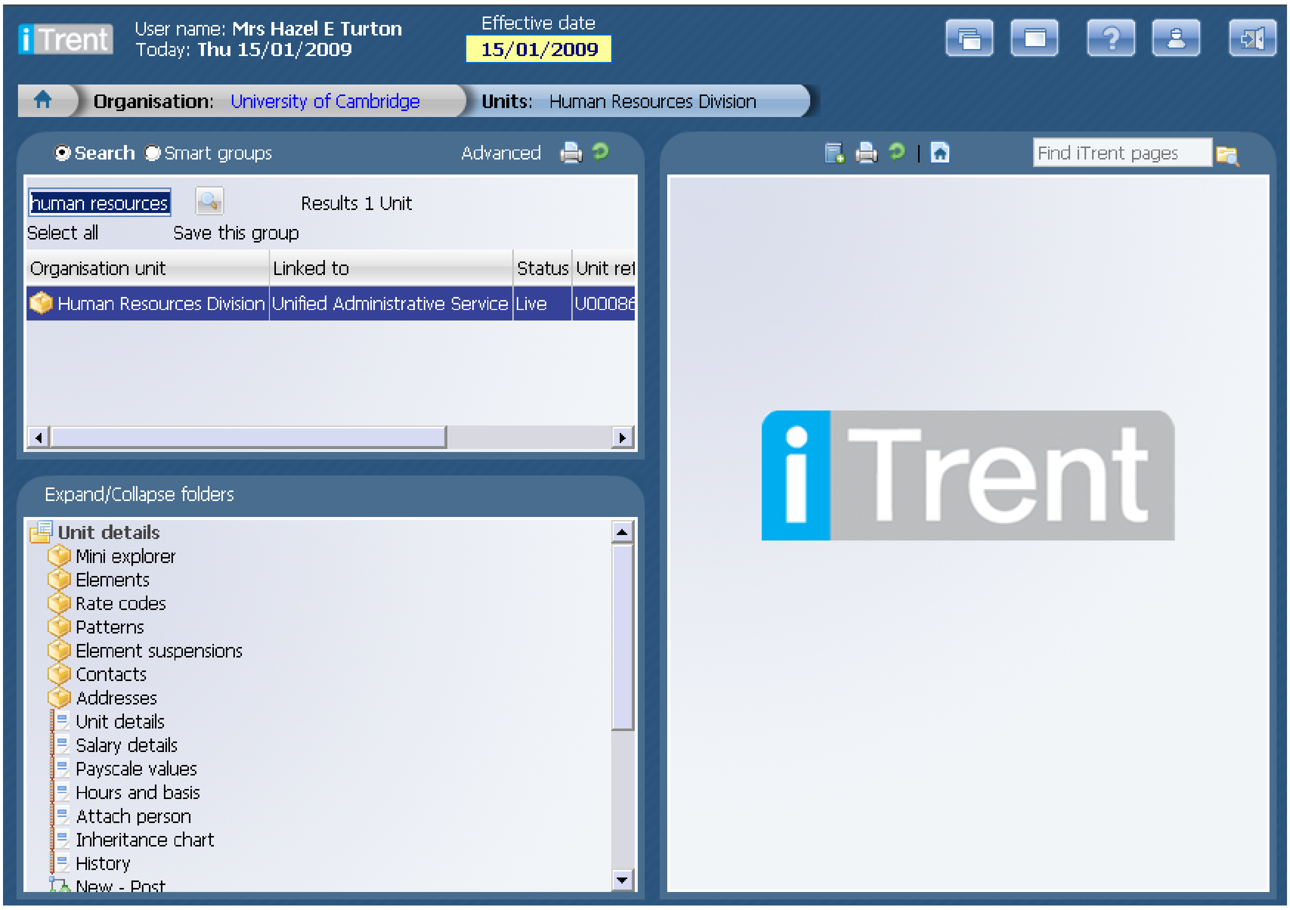
It is suggested that you use the Organisation explorer only to identify an area of the University structure to initialise a search procedure. To add or maintain items search for the unit, post or position and click the Mini explorer link in the action pane.

2.2 Mini Explorer

The Mini Explorer allows you to add new items to the Organisation structure as required and to view and maintain Unit, Post and Position details of the organisation structure for a specific area in the object pane.

As the whole structure of the University is so large it is easier to create, amend or view the specific area of the organisation structure you require using the Mini Explorer.

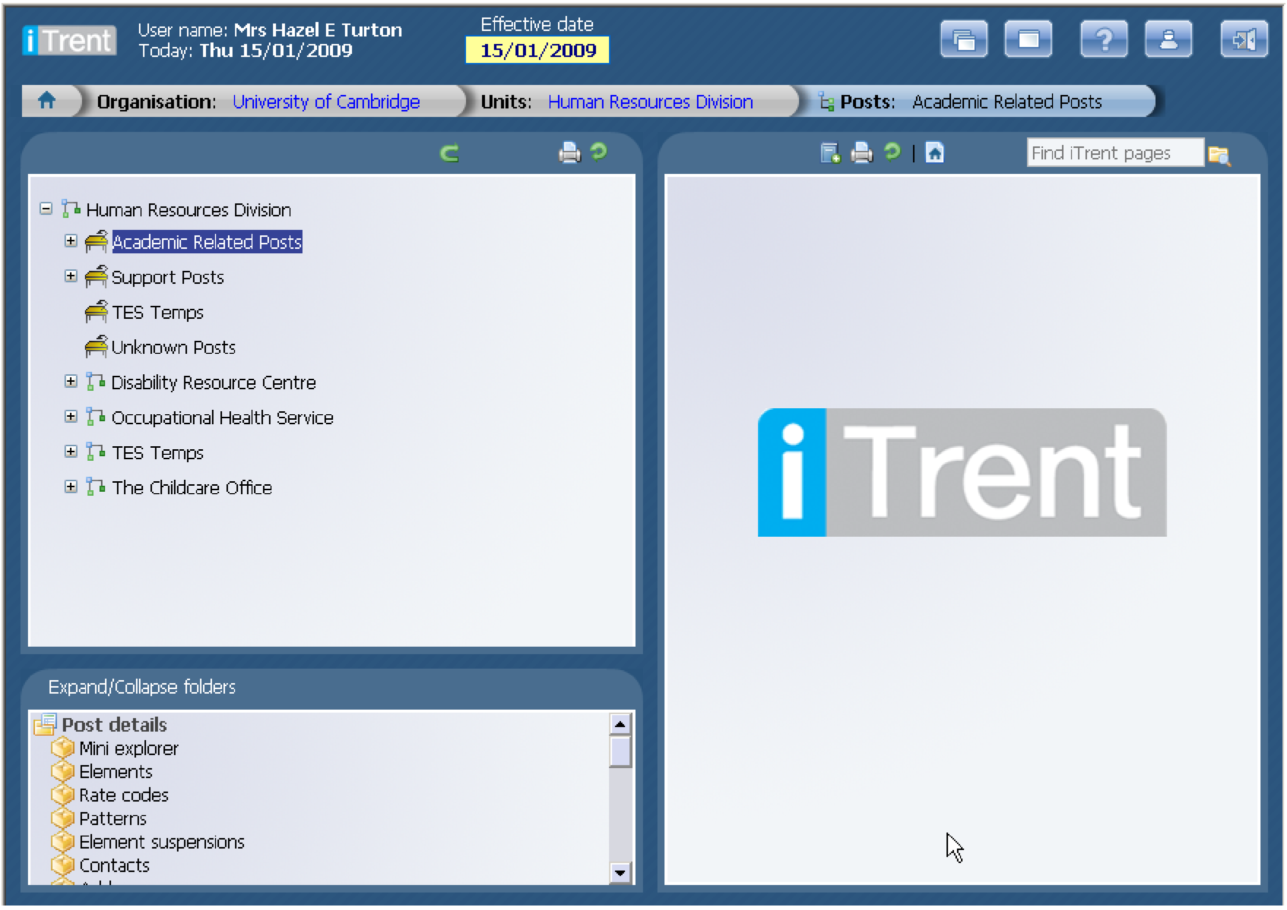
The mini explorer options are available for each of the different components that make up the structure (Units, Posts and Positions), and can be accessed in the relevant folder.



Use the search facility to locate the item you require. (See the introduction manual for more information about performing searches). Select from the object pane the item you wish to enquire on and click the Mini explorer link. The structure icon of the selected item will appear in the object pane.

Like the organisation explorer, the mini explorer structure diagram can be expanded by clicking the plus ⊞ icon next to items that contain lower levels.

The explorer view will appear within the Object pane. If you need to add, amend or view details within the mini explorer you can click on the relevant item and the appropriate folder items will be displayed in the Action Pane as usual.



2.2.1 *To maintain existing data*

If you need to modify existing structure components select the required item in the object pane and the related function will become available in the action pane.

Selecting a person in the object pane will make person related options available in the action pane. Selecting unit, post or position in the object pane will update the action pane to display the available options for the unit, post or position respectively.

2.2.2 *Amending or entering new details*

Select the item to be modified in the object pane and then click the required item details in the action pane. Existing information will be shown on the function details page in the display pane, where it can be amended as necessary.

When you have completed an entry or amendment, click Save in the display pane to save the changes.

3 Overview of TES Trent Process

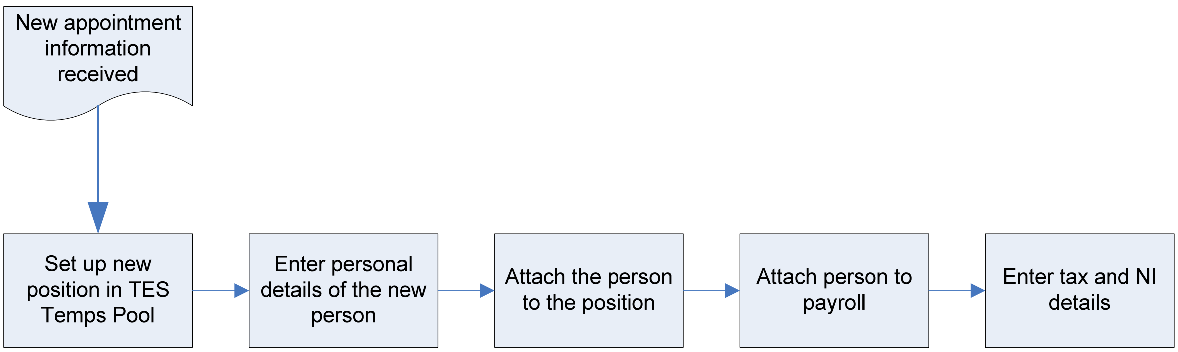
Once a new temp's suitability to work has been assessed and they have been placed in a position, a TES Database record will be created and a Trent record.

Creating the Trent record involves both TES and Payroll tasks. The TES team will:

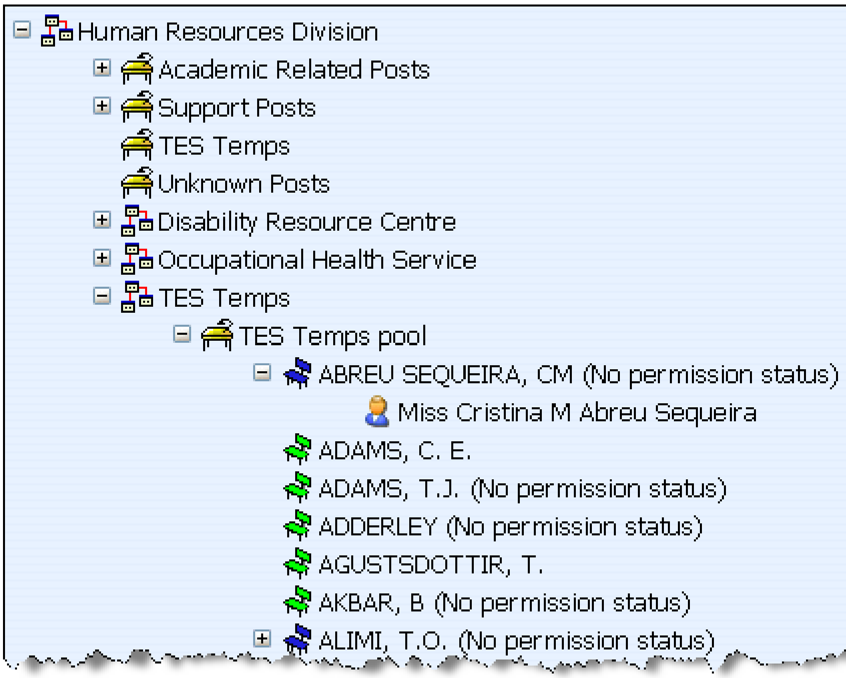
1. Set up a new position in the TES Temps pool
2. Check whether the person already exists and where necessary set up the person
3. Attach the person to the position.
4. Attach the person to payroll

The payroll team will then:

1. Enter the persons NI, tax and bank details
2. Process the payroll file



3.1 How this will be displayed in CHRIS:



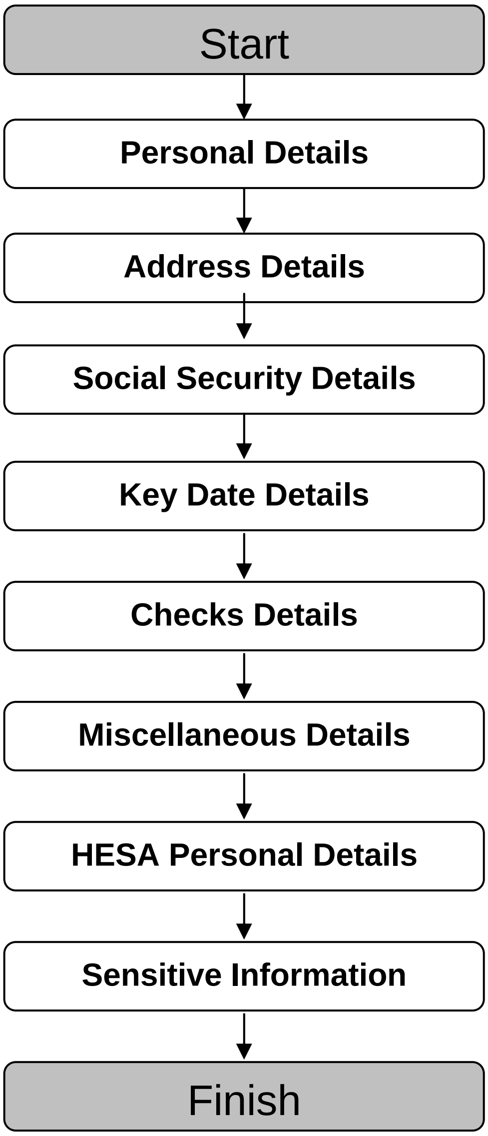
All TES temps will be recorded

- within the Human Resources Division under the category ‘TES Temps pool’,
- with a position title of their surname and initial(s).

4 Adding Personal Details of a New Temp

The new person (TES) process chain guides you through all the screens regarding personal information that need to be completed for a new individual.

The following diagram shows the forms encountered in the chain.

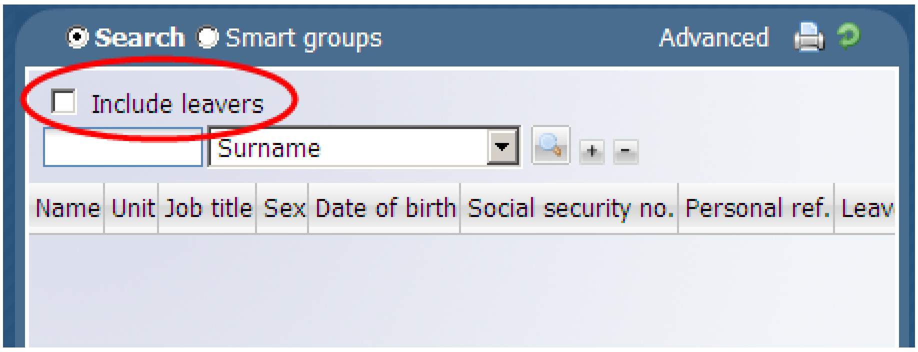


4.1 Check to see if person already exists in CHRIS

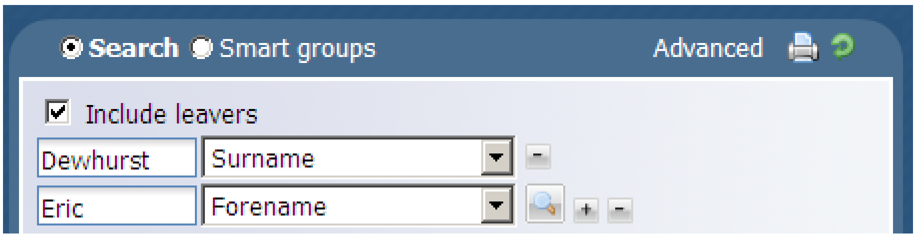
Before proceeding with the New Starter process it is necessary to establish whether or not a record already exists within Trent for the person.

The simple search has the option to be able to search for leavers using specific criteria (surname, forename) to check records of people who have left the Universities employment.

1. Select the University of Cambridge organisation
2. Select the People menu item from the Action Pane

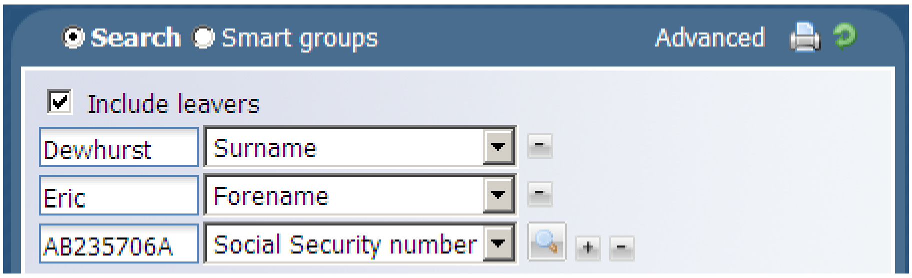


3. Ensure that the Include leavers checkbox has been selected
4. Enter the surname of the person you are looking for
5. Click on the + button to add another line of criteria
6. Enter the forename of the person



7. Press the Enter key or click the Search icon to perform the search.

It is possible that a person may have changed their name, so it is suggested that using the additional line of criteria like Social Security number is used, to ensure that you are finding the correct person.



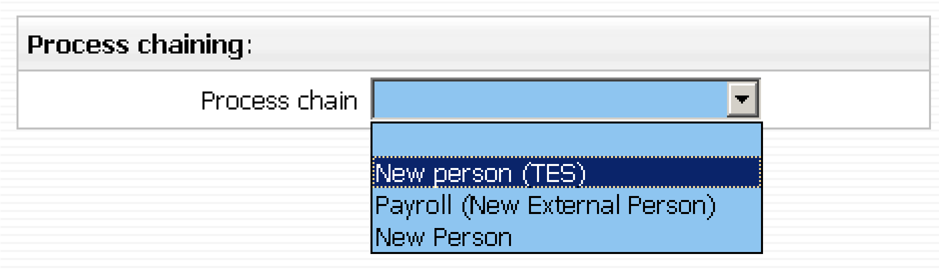
If the person does not already exist on the system, continue to the next section. It is only necessary to capture limited personal information on Trent for TES temps as the majority of their details will be captured and maintained on TES's existing database.

4.2 Starting the Chain

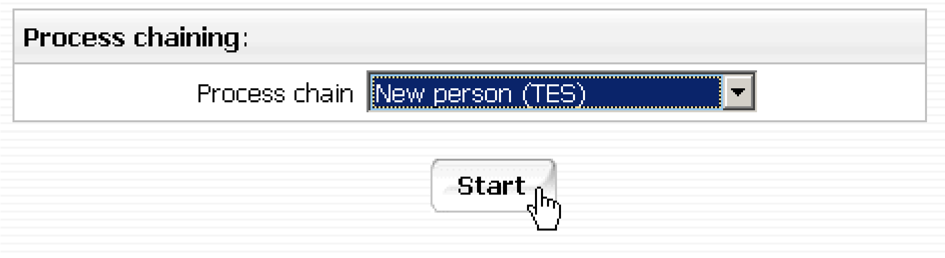
1. Once you have searched for the individual and established that they have not been previously entered on CHRIS.

   Navigate: Organisation > People > Process Chaining

2. Select from the drop down list ‘New person (TES)’



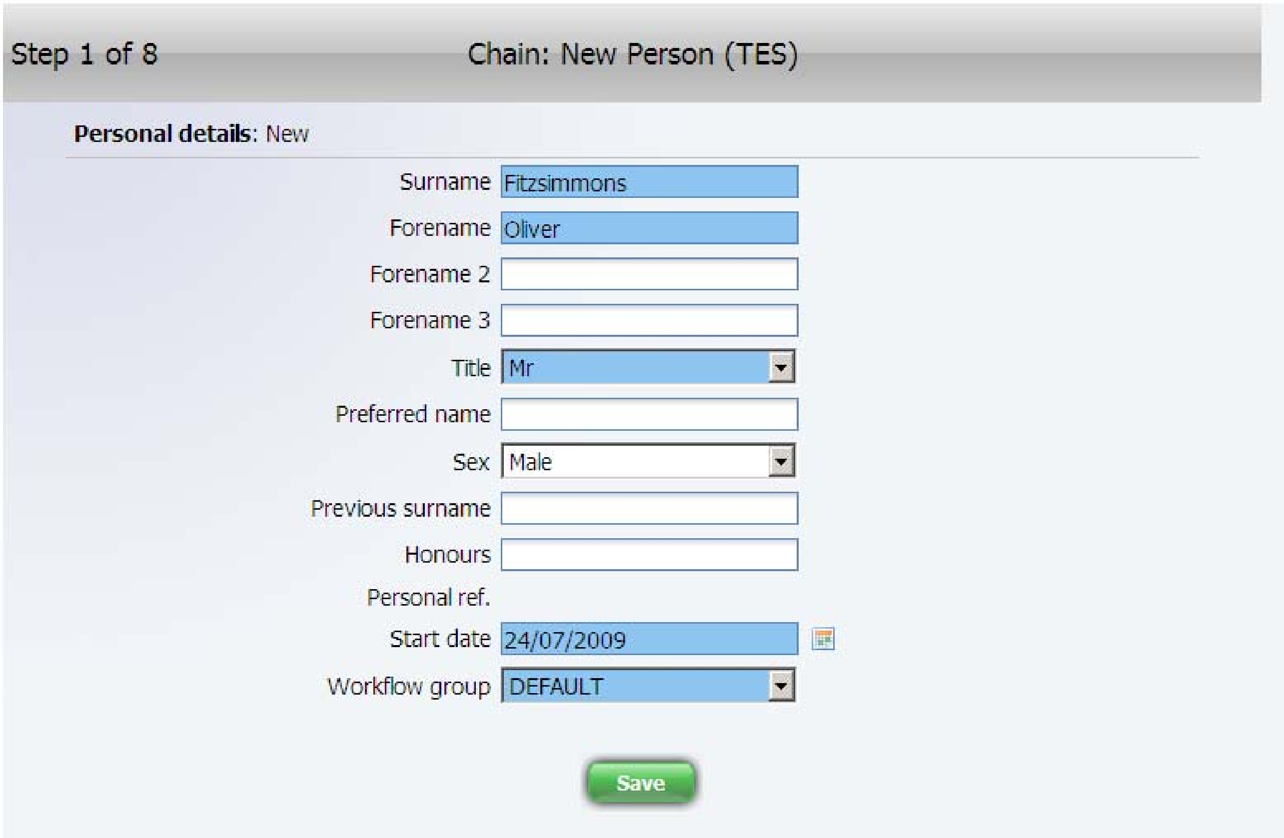
3. Click on the Start button



4.3 Personal Details

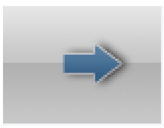
1. Key in the surname, first name, first name 2, first name 3 if applicable.
2. Click the drop down list arrow and select a title
3. Enter sex.
4. Enter the organisation start date. Leave the workflow group set to Default.
5. Click the 

button.



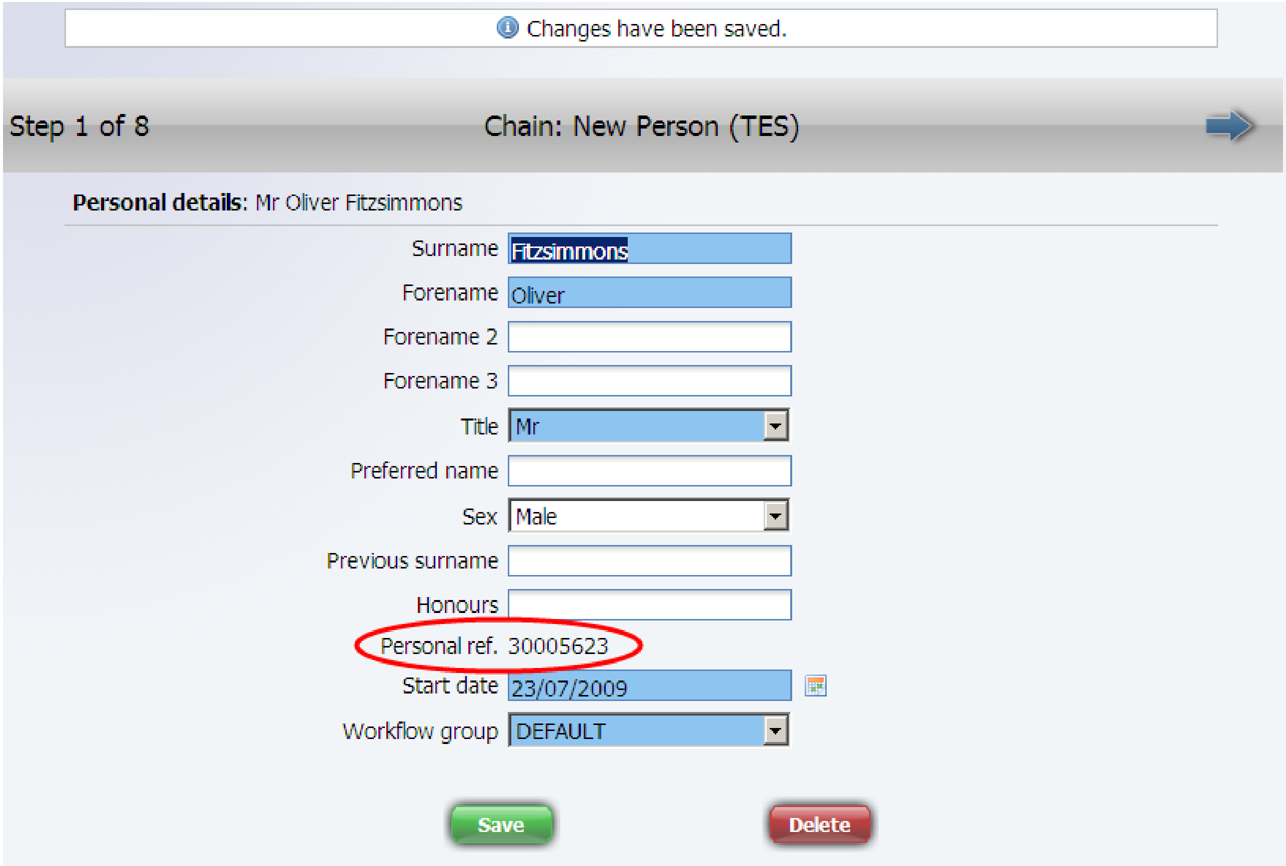
The record will be saved and the new person's details will be displayed in the object pane.

You will notice that an arrow will appear in the top right hand corner once Step 1 has been saved.



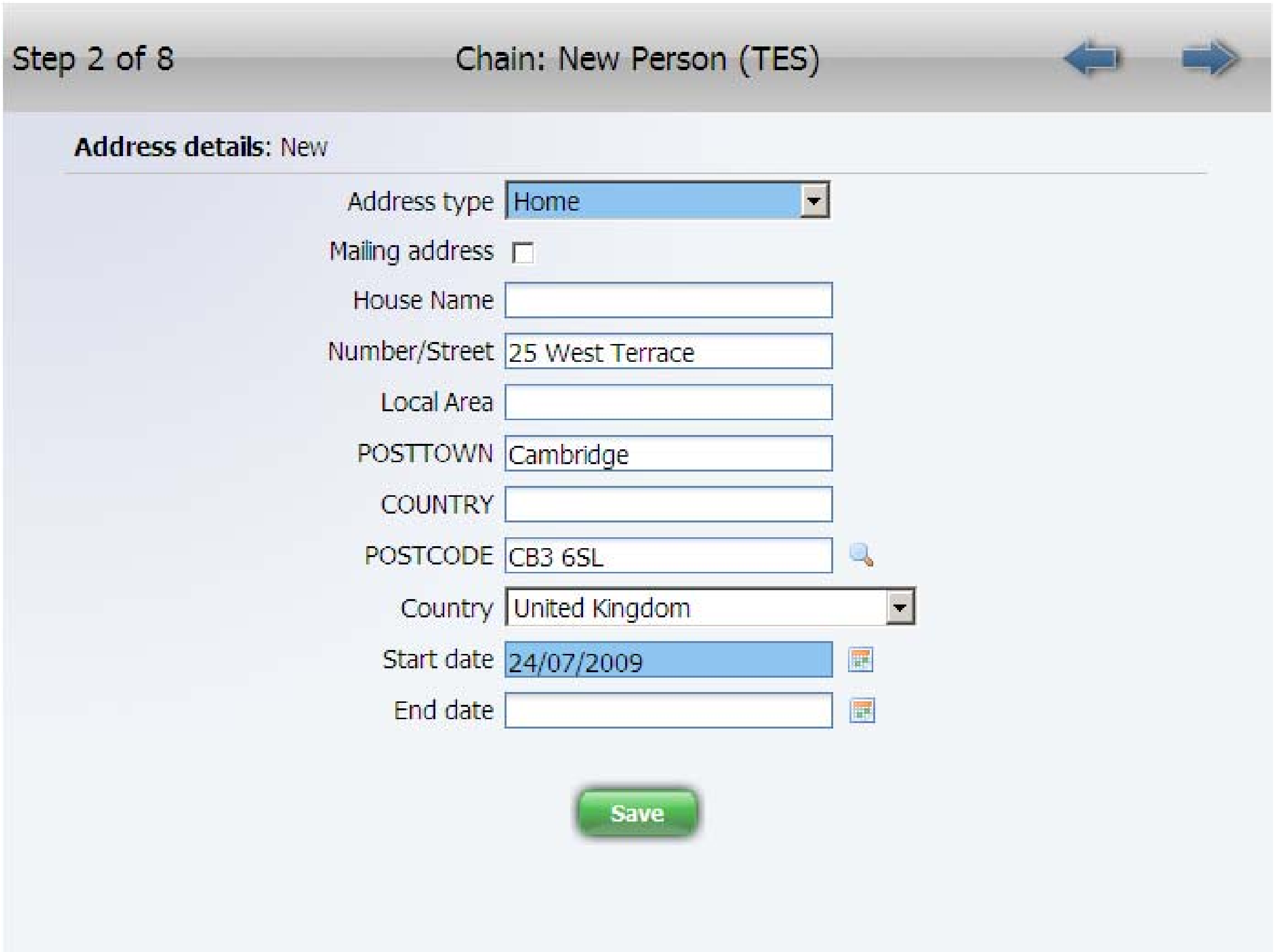
4.3.1 Personal reference number

A personal reference number is automatically generated by Trent when a new person record is created. To enable you to easily identify this person it is advised that you make a note of this number once you have added them.



4.4 Address Details

1. Click on the Next Step button, this will take you to step 2, the form used to enter an employee's address
2. Enter the person's address.



3. Click the 

button.

4.5 Social Security Details

1. Click on the Next Step button

2. Enter the National Insurance number

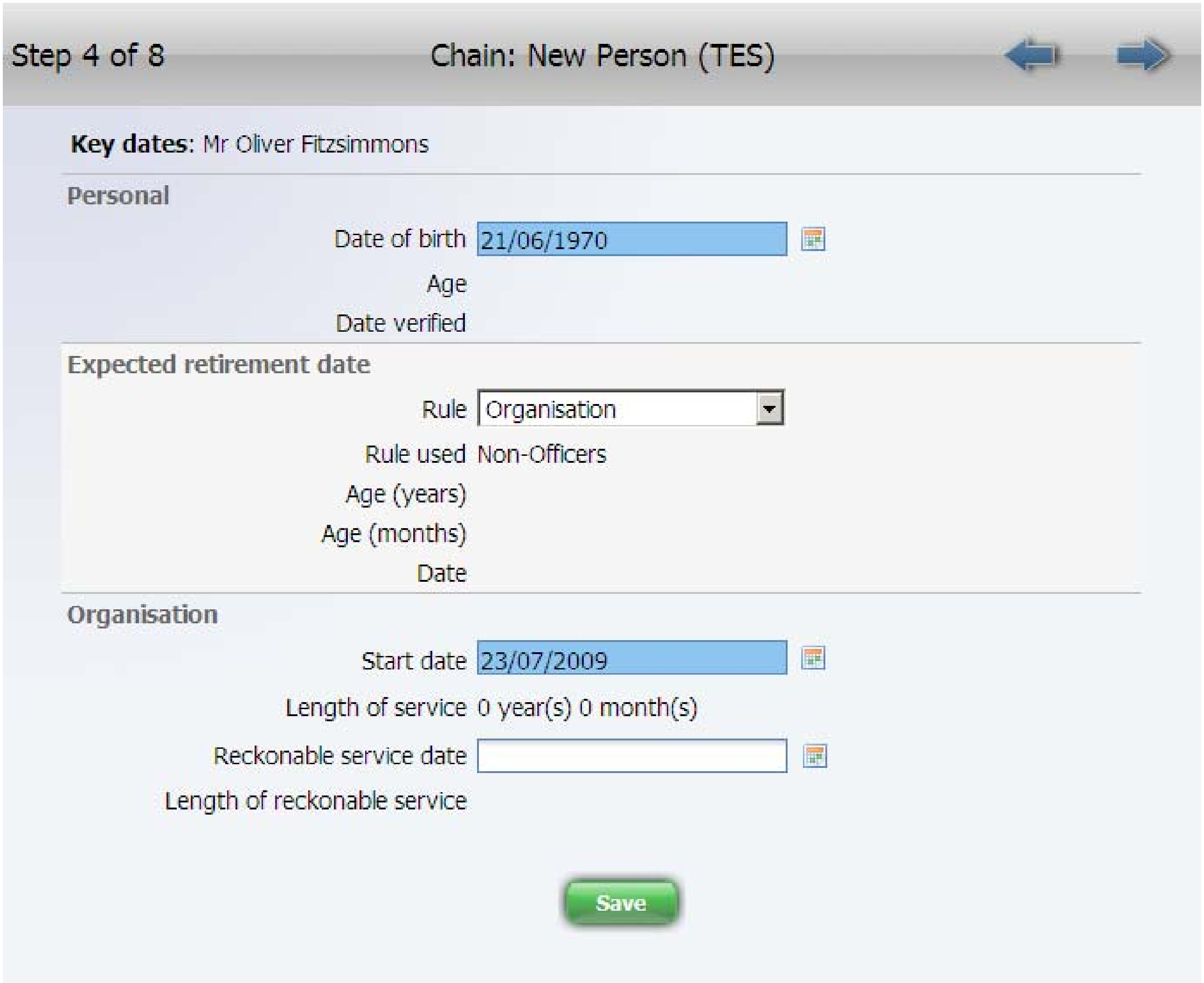
Where an employee does not yet have a National Insurance number this step can be left uncompleted and the details will need to be completed when they are issued with their number.

3. Click the 

button.

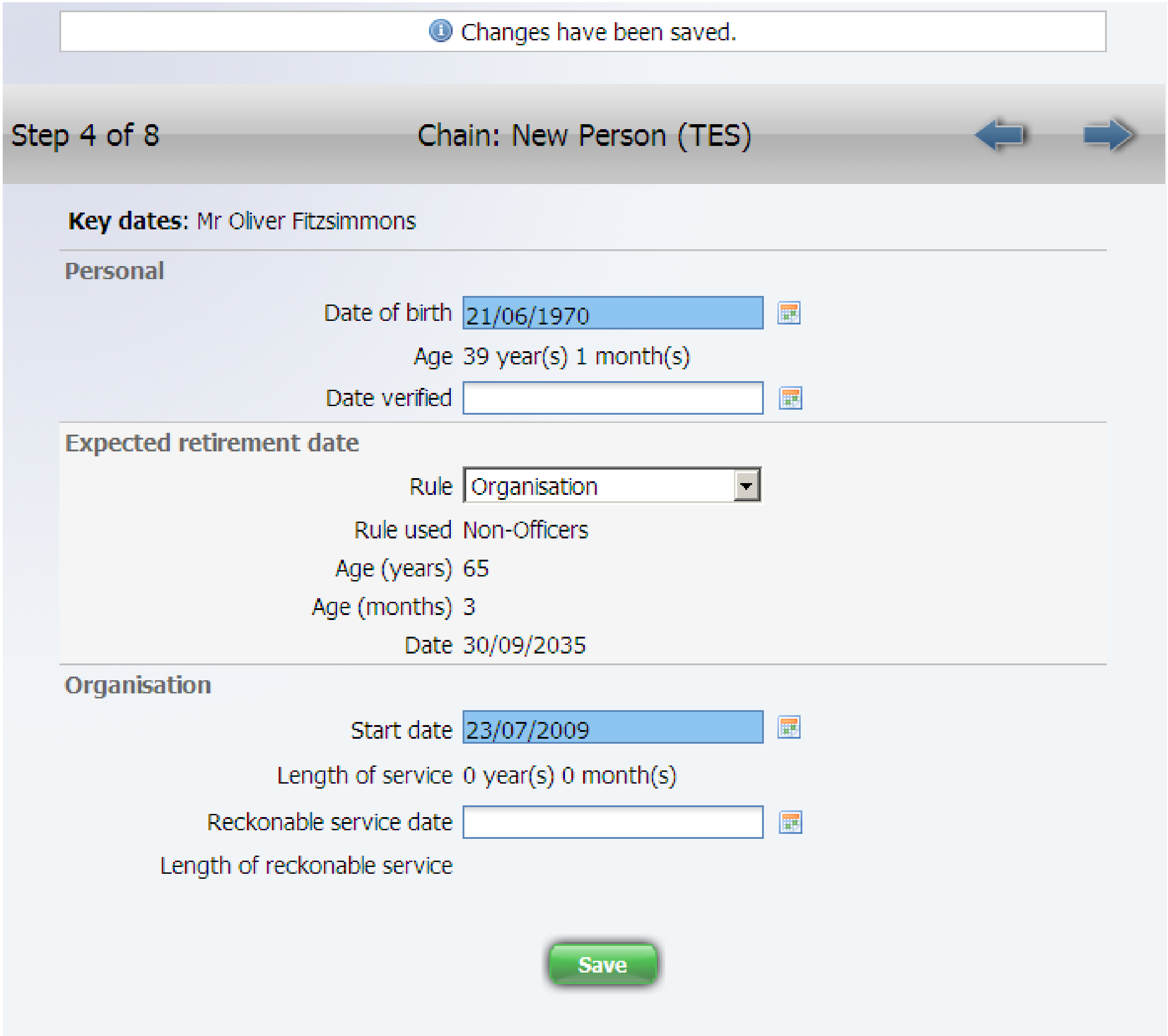
4.6 Key Date Details

1. Click the Next Step button
2. Enter the Date of Birth



3. Click the Save the button

Once you have saved this screen, the system will automatically calculate the individuals' age and expected retirement date.

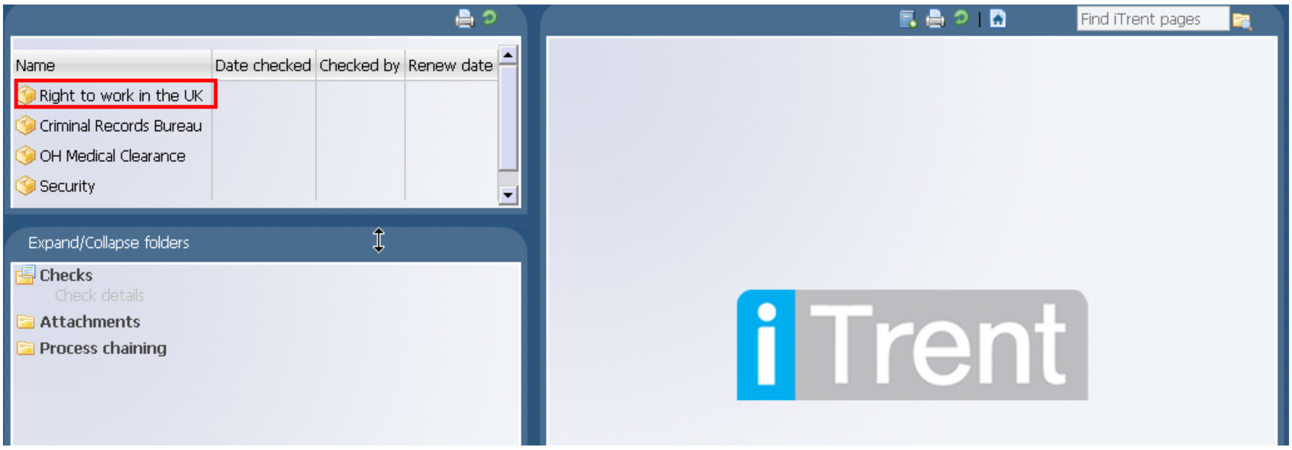


4.7 Check Details

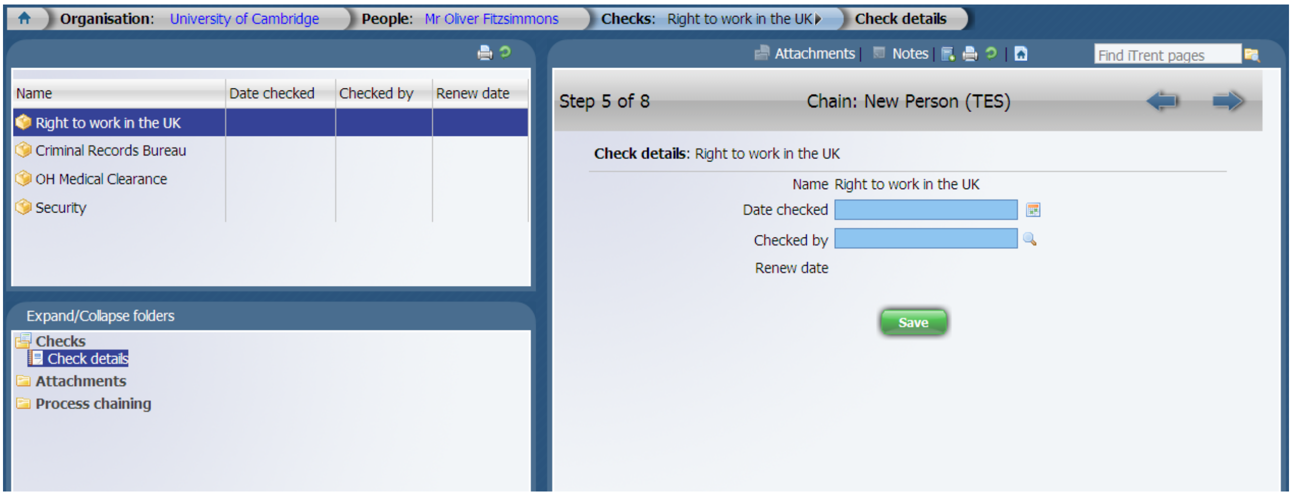
The University has a legal obligation to ensure that all employees have a valid entitlement to work and reside in the UK, regardless of nationality. All appointments require a right to work check and the details of this check should be recorded in employee checks.

Where an appointment also requires the occupant to have health, criminal records or security checks these details can also be recorded.

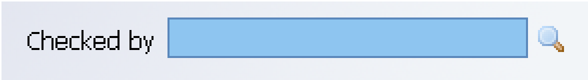
1. Click on the Next Step button.
2. The checks will be displayed with the Right to work in the UK check red circled.



3. Click on the Right to work in the UK and step 5 of the process chain will be displayed.

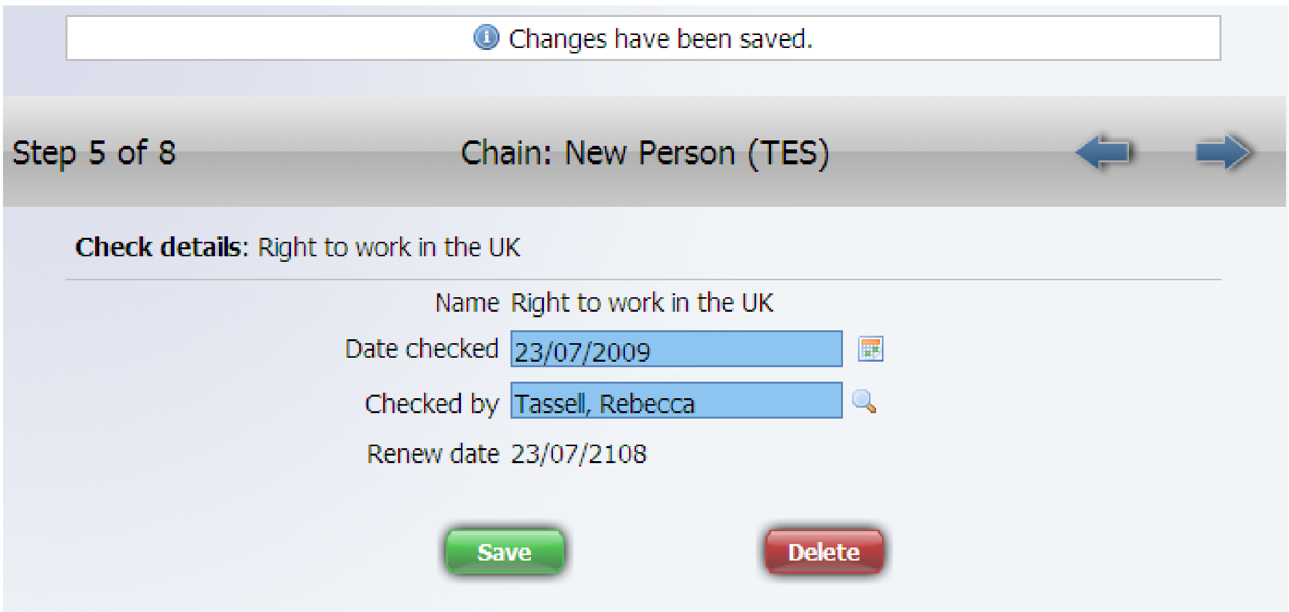


4. Enter the details for the date checked and who checked by. Click on the magnifier to the right of Checked by to search for their name.



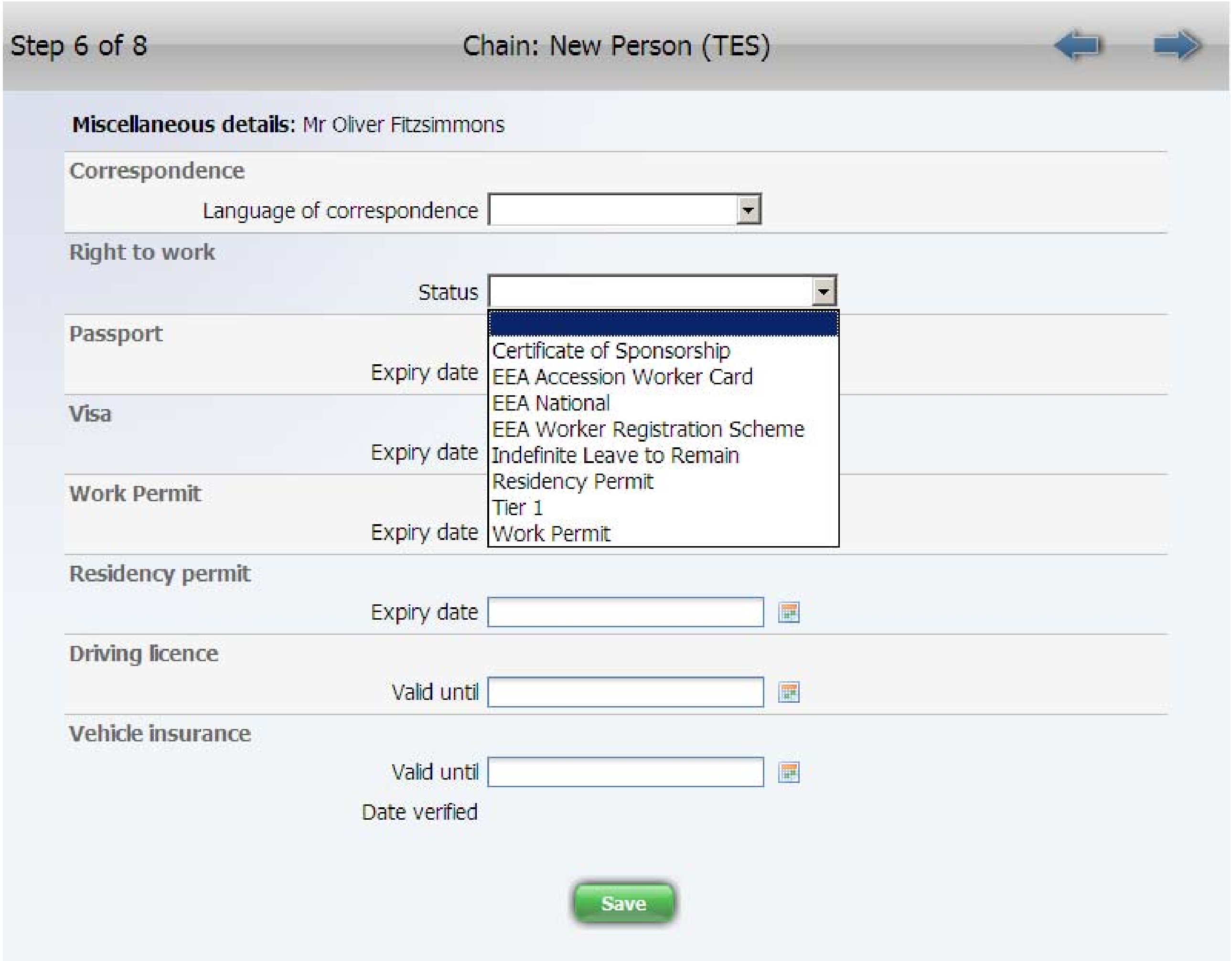
5. Click the Save button

A renew date will automatically be calculated. This has been set at the maximum – 99 years from the date checked.



4.8 Miscellaneous Details

1. Click on the Next Step button



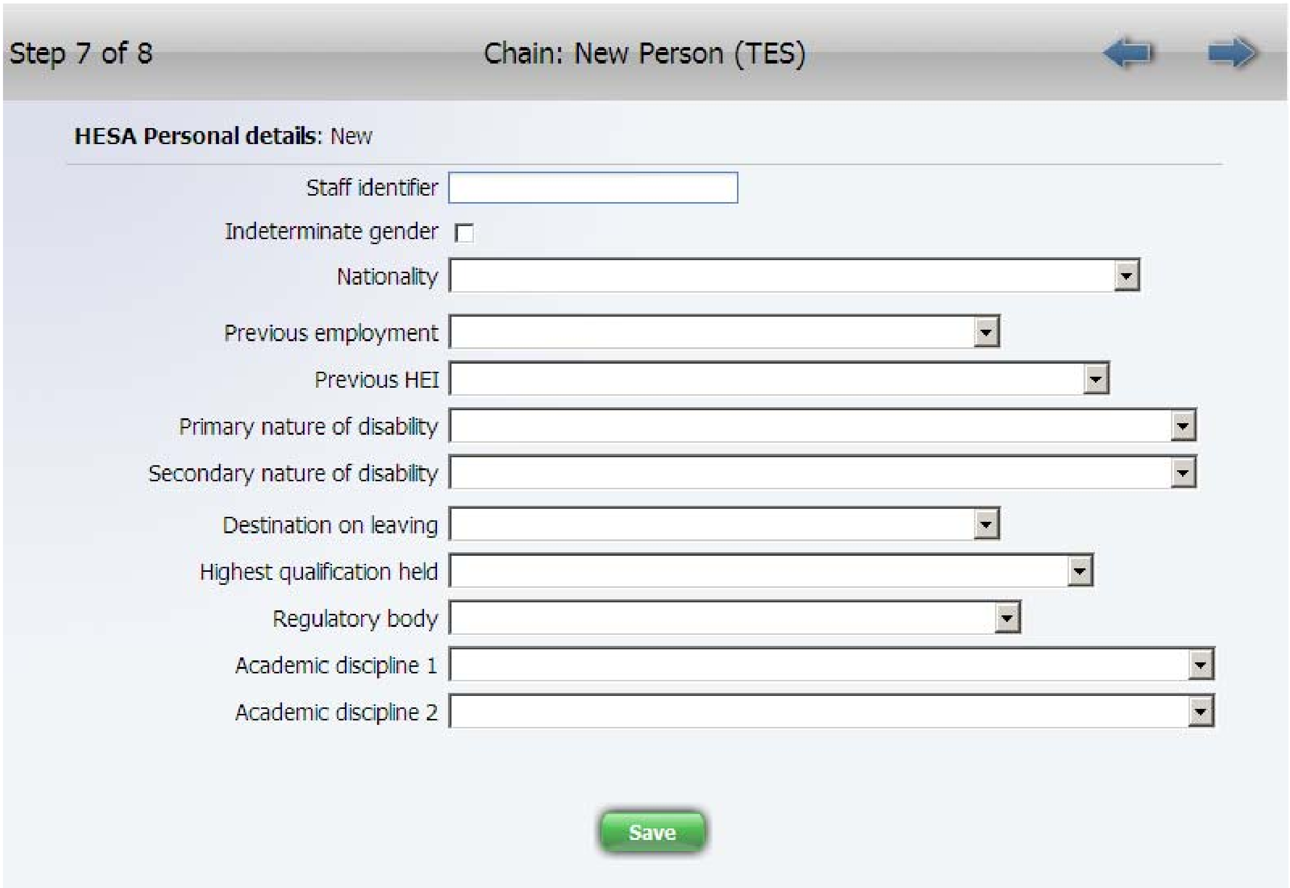
2. Enter the Right to Work status
   - EEA National (all employees from the European Economic Area who require no permit)
   - EEA Worker Registration Scheme (employees from the 8 EU countries that require WRS)
   - EEA Accession Worker Card (employees from Romania or Bulgaria)
   - Work Permit (employees who require a work permit)
   - Residency Permit (employees who hold a valid Residency Permit not related to a work permit)
   - Indefinite Leave to Remain (employees who have been granted ILR)

3. Where passport, visa, work permit or residency details are supplied key in the expiry date as appropriate.
4. Click the 

button.

4.9 HESA Personal Details

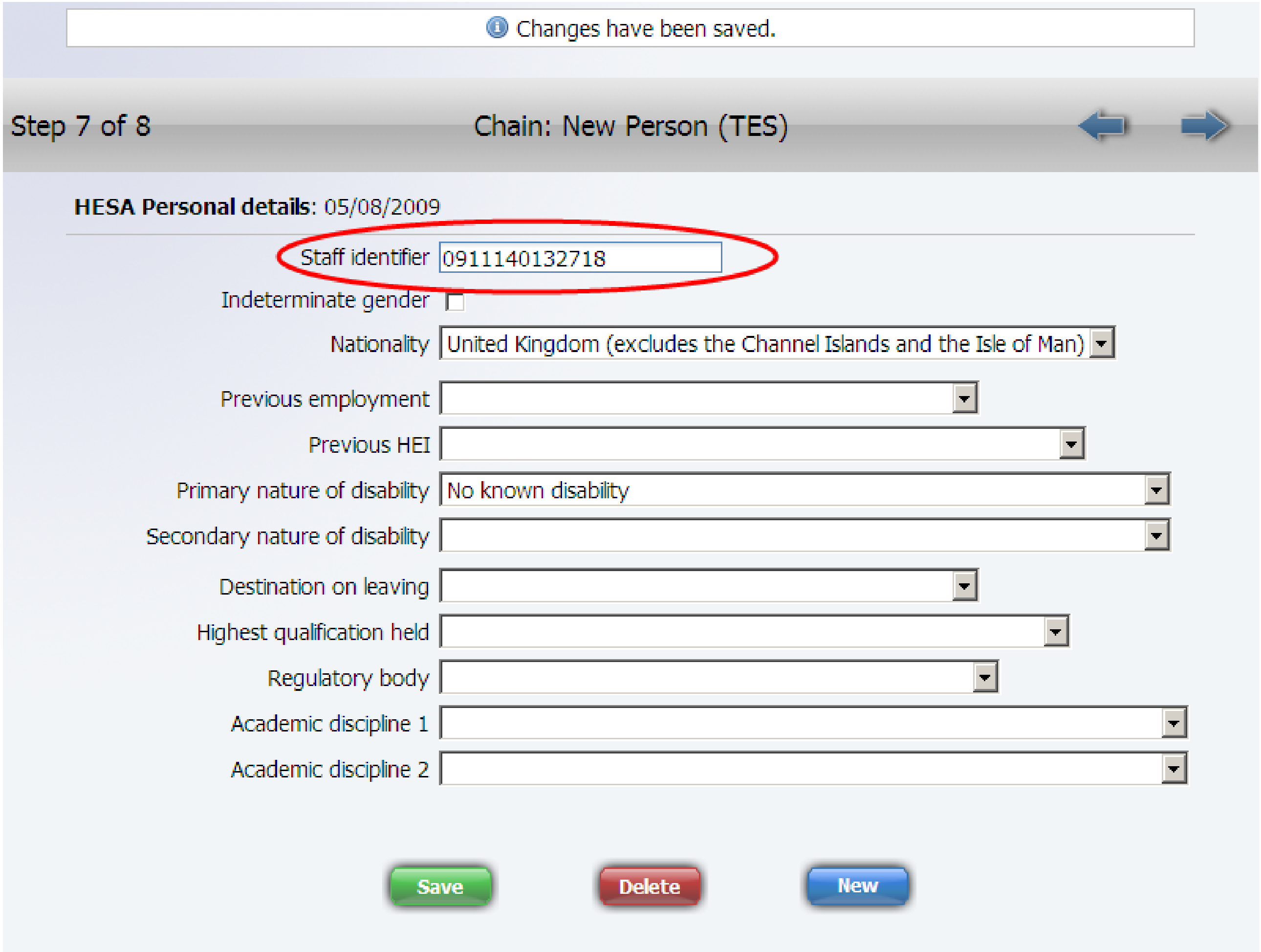
1. Click on the Next Step button



2. Enter their nationality and disability
3. Click the 

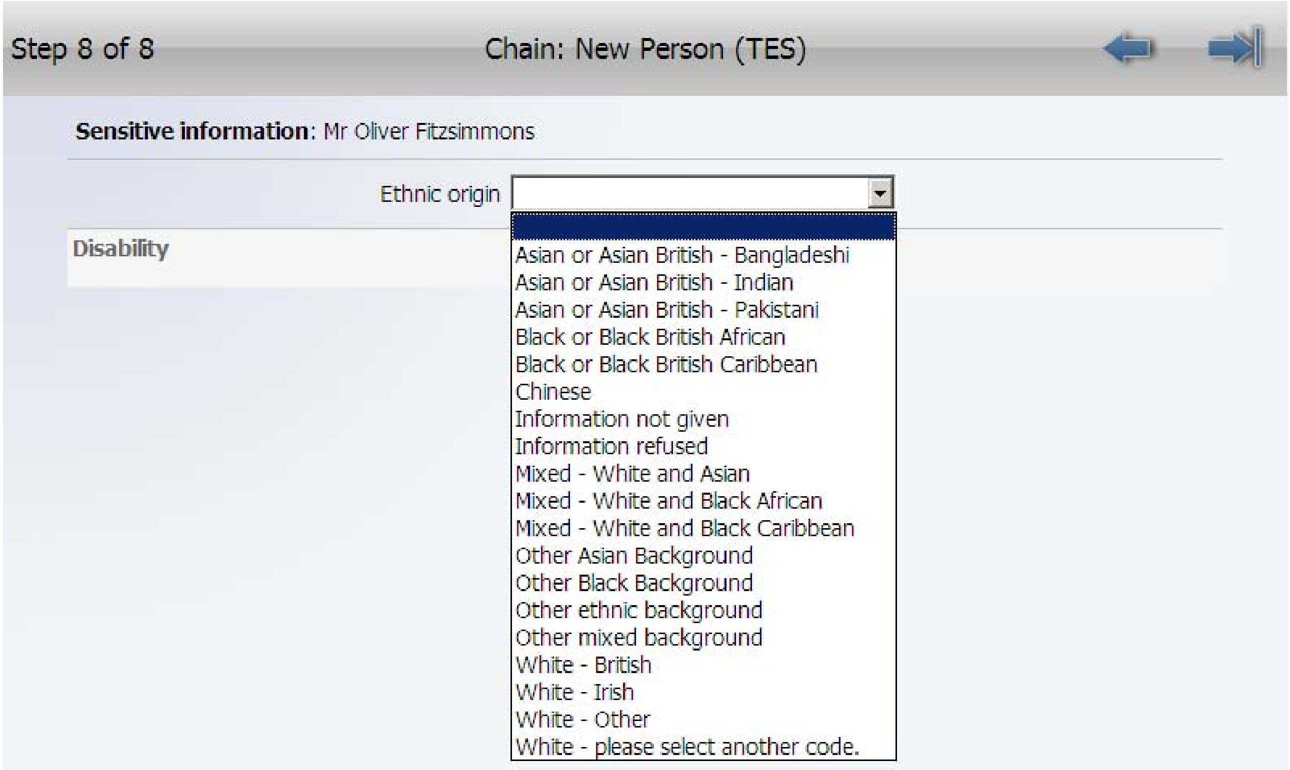
button

4. This will generate a Staff Identifier number



4.10 Sensitive Information

1. Click on the Next Step button



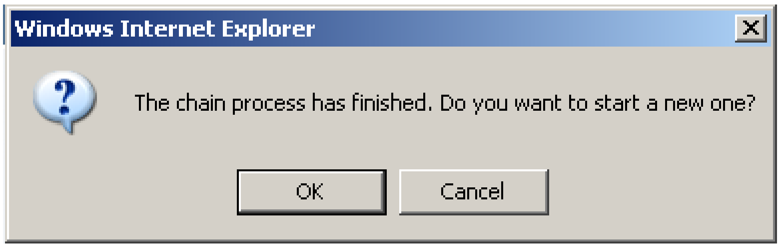
2. Enter the Ethnic origin

3. Click the 

button

4. Click on the End button

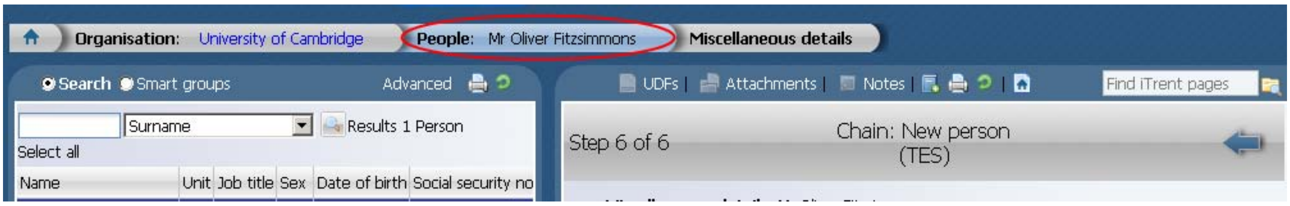
The following message will appear



Click OK to start a new chain process or Cancel to finish.

This completes the last step of the New person (TES) process chain.

Use the navigation trail to exit the process chain and return to the person record.

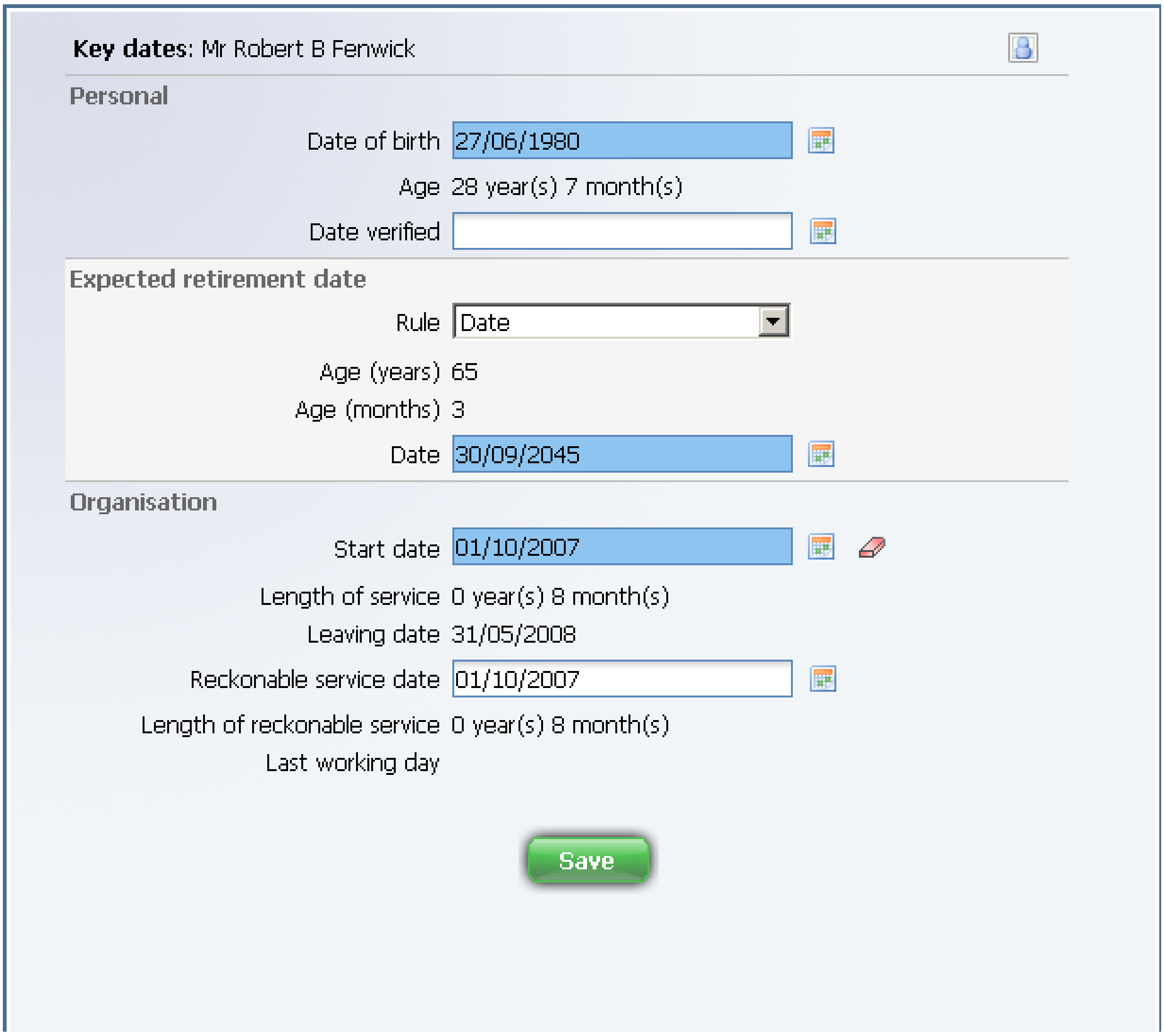


4.11 New Period of Employment

This process should be followed when a previous leaver restarts and a new period of employment needs to be created. Where a search has resulted in a person being found as a previous employee, their person record will required reactivating for the new period of employment.

Trent provides the facility to utilise a person's record that has previously been employed by the University and restart employment. It creates a new period of employment, so both instances appear on the persons record.

1. Select the person that is to start a new period of employment with the University. (See section 4.1 on searching for leavers)
2. Select the Key Date Details form


Key dates: Mr Robert B Fenwick

Personal

Date of birth 27/06/1980

Age 28 year(s) 7 month(s)

Date verified

Expected retirement date

Rule Date

Age (years) 65

Age (months) 3

Date 30/09/2045

Organisation

Start date 01/10/2007

Length of service 0 year(s) 8 month(s)

Leaving date 31/05/2008

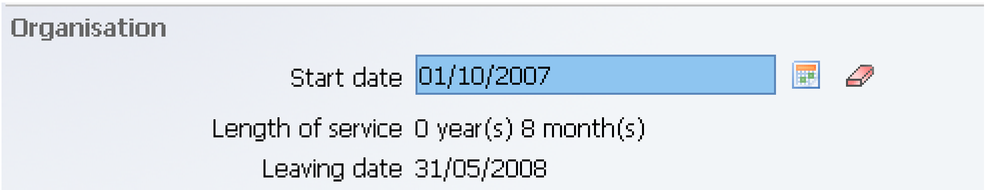
Reckonable service date 01/10/2007

Length of reckonable service 0 year(s) 8 month(s)

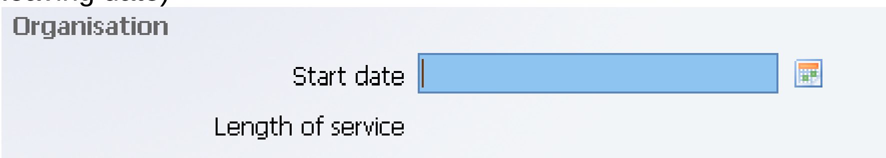
Last working day

Save

3. Click the ‘rubber’ icon.



This will remove the start date for the previous employee (and the length of service and leaving date)



4. Enter their new start date
5. Amend the reckonable service date where applicable.
6. Click on the **Save** button.

The person record will be reactivated, using their last recorded personal data. Check through these details and make changes where necessary.

Navigate: **Organisation >People (find person using advanced search) > Personal information folder**

> Personal Details	Name, title and sex
> Addresses	Home address
> Social security	UK Legislation, NI number
> Key dates	Date of birth
> Miscellaneous Details	Right to work status & expiry dates

Profile folder

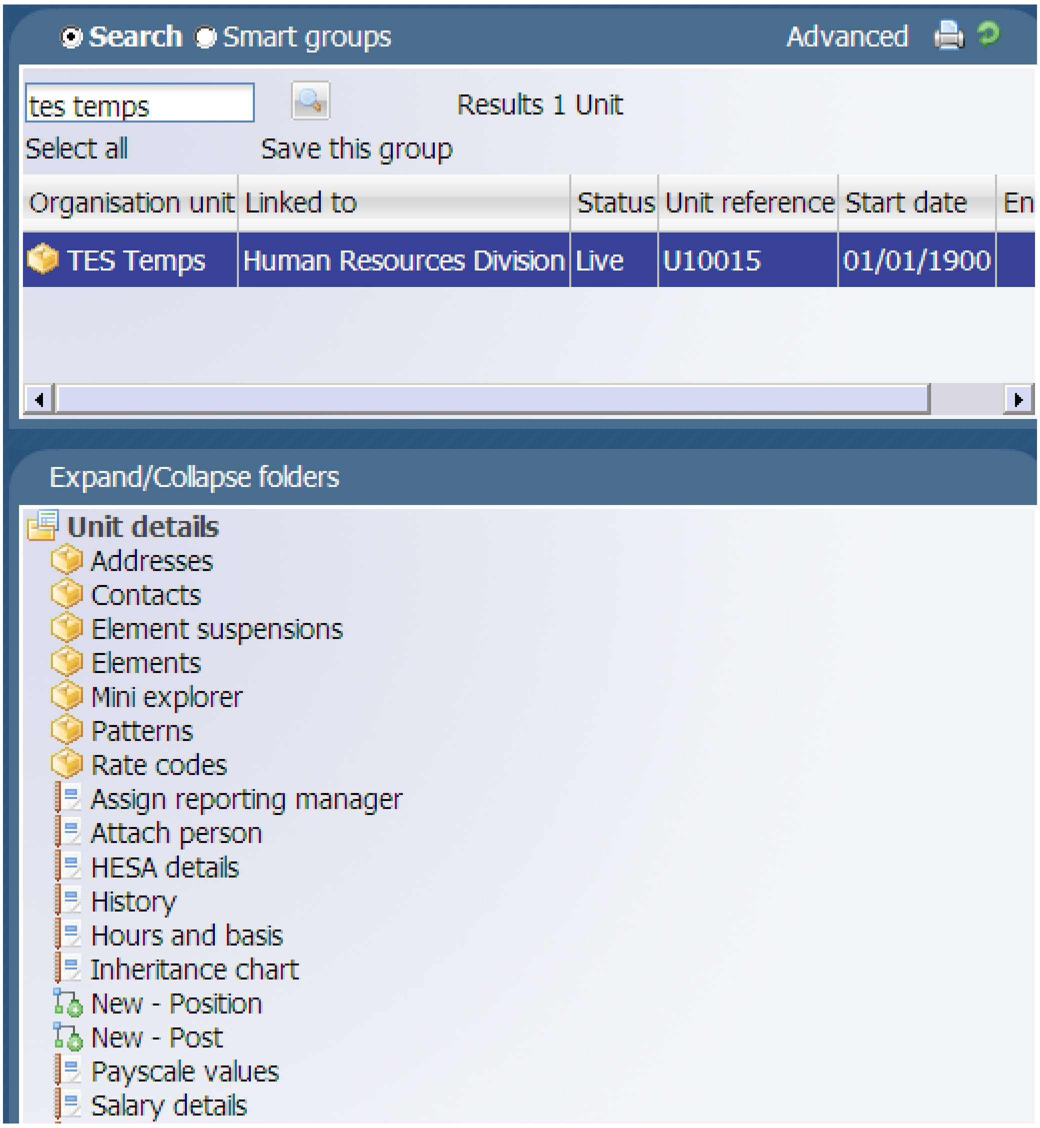
> Checks > right to work	Enter date checked

5 Setting up a new position in the TES Temps Pool

Positions are a location in the organisation structure in which a person can be placed.

Navigate: Organisation > Units (find TES Temps) > Mini Explorer > TES Temps Pool > New - Position

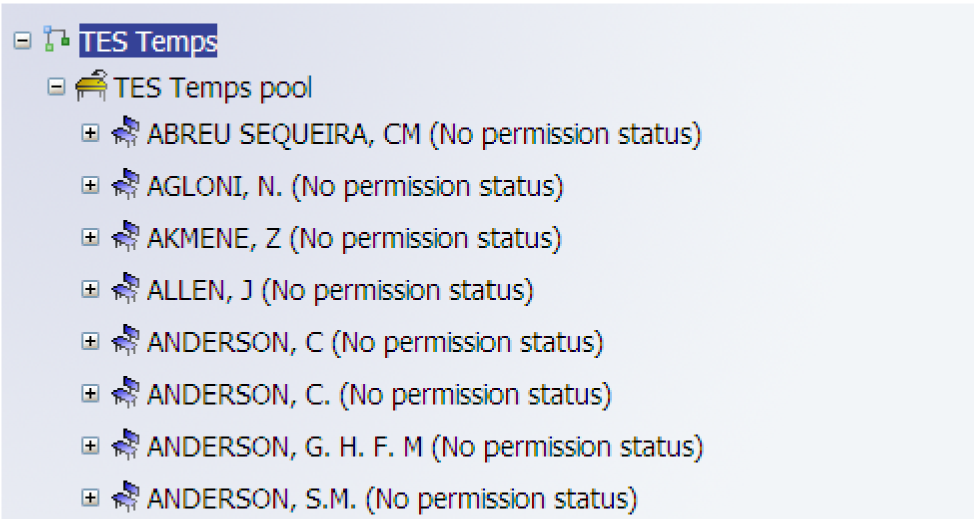
1. Select the Units menu and search for TES Temps



2. Select Mini explorer

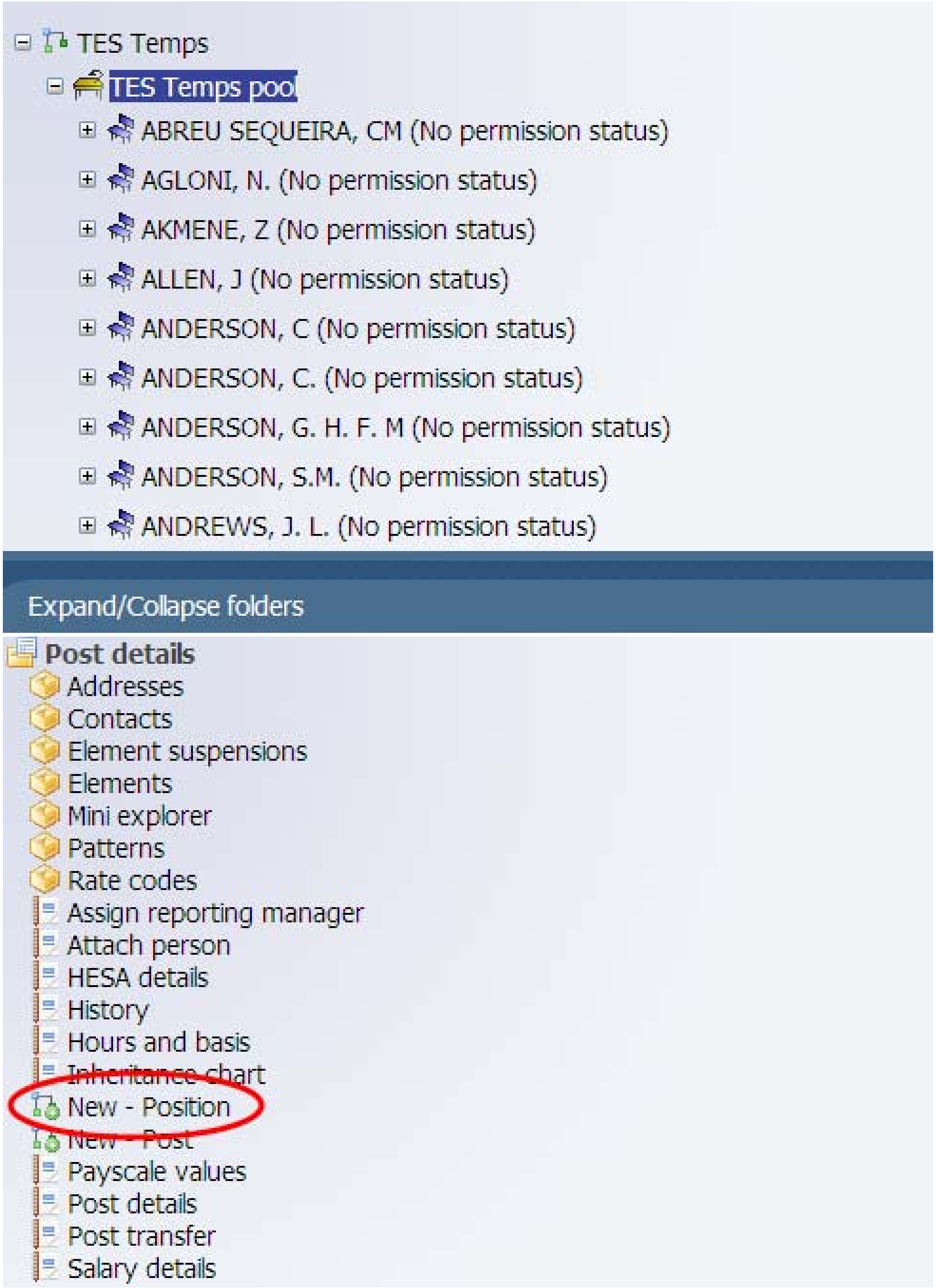
3. Click on the expand icon

4. The current positions will be displayed. The blue position icon indicates a position which is occupied. A green position icon indicates a vacant position.

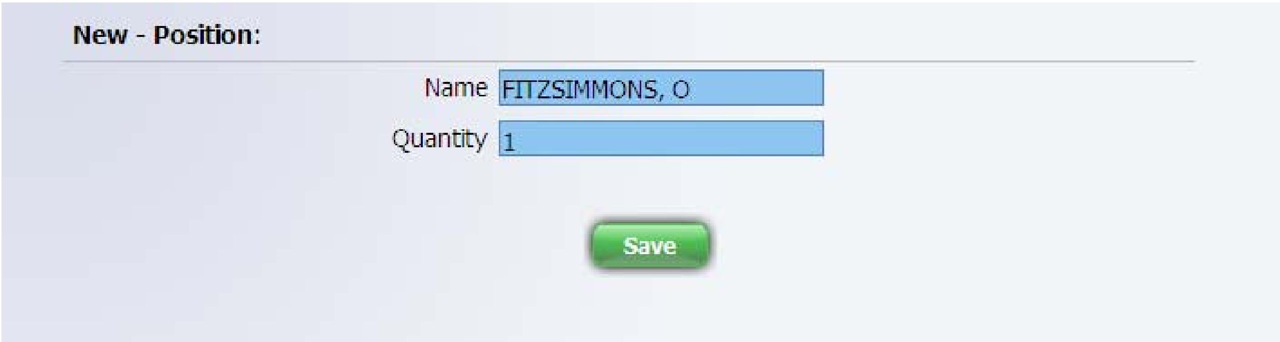


5. Select the TES Temps pool post (the yellow table)

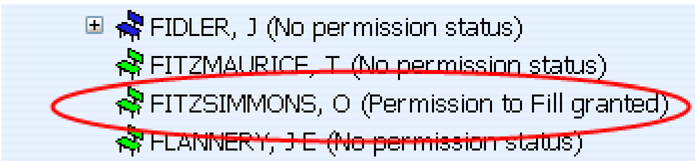
6. Click on the New - Position option in the display pane. Trent opens the new – position page in the display pane.



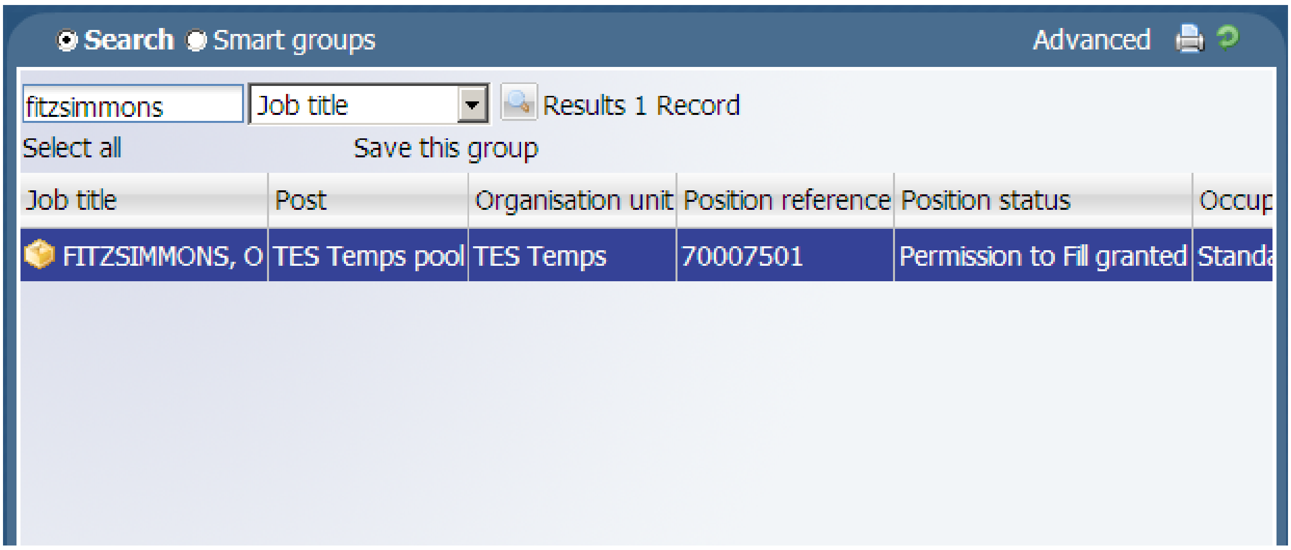
7. Enter the name for the new position. The position name is the person’s surname, a comma and the initial(s) in capital letters.



8. Click the  button to save the changes
9. The new position will be displayed as a green chair in the Mini explorer.

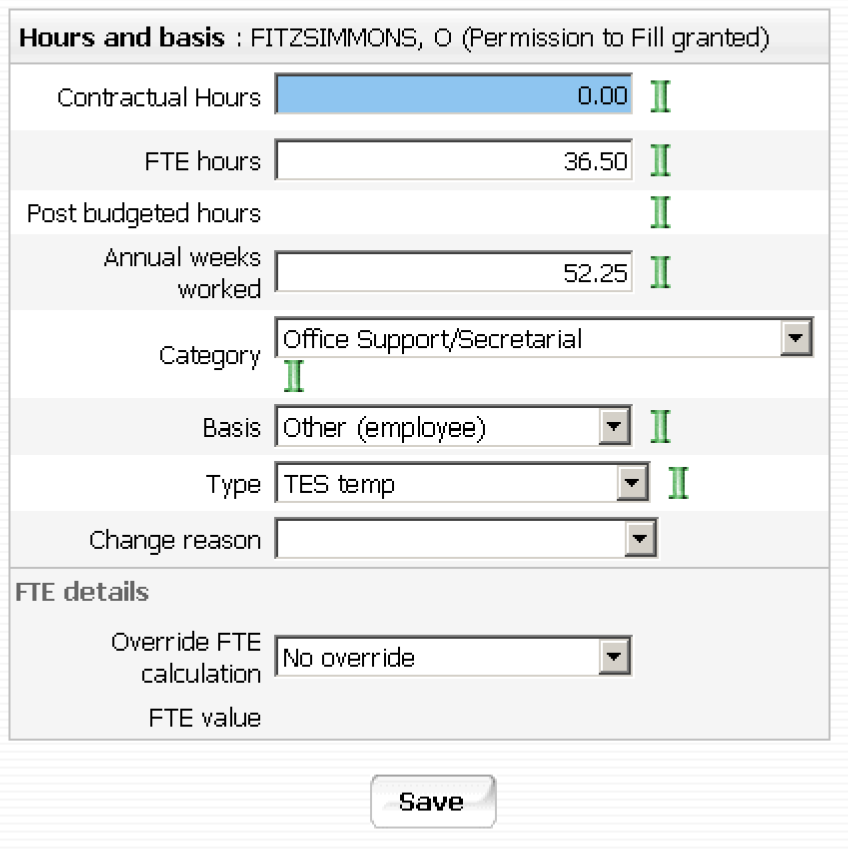


10. You can search for the new position using the surname



11. Select the new position and the position details menu will be displayed in the object pane below.

12. Select the Hours and Basis menu



13. Check that the contractual hours are zero and the FTE 36.5. Check the category and change where necessary.

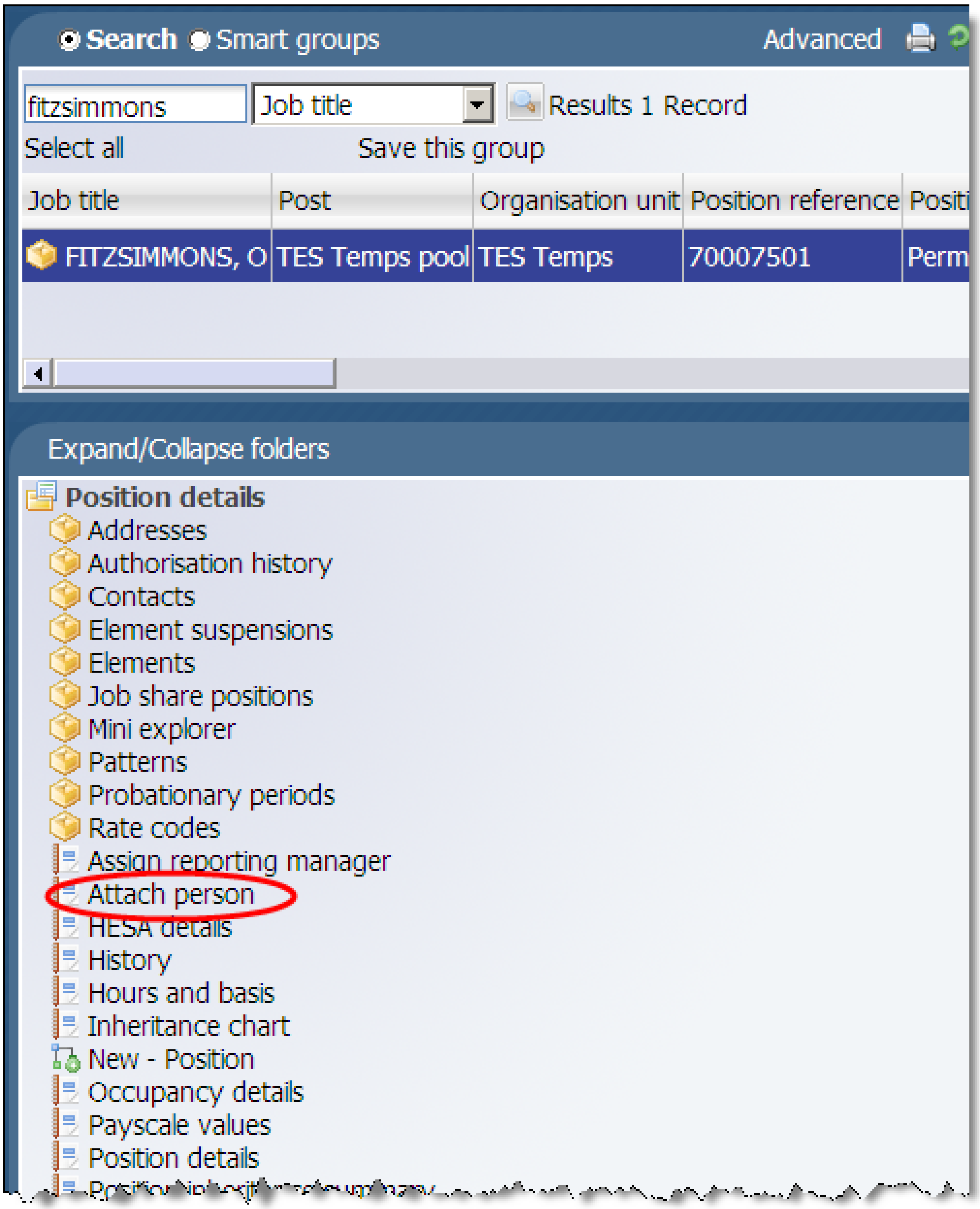
6 Attaching a Person (temp) to a Position

Pre-requisites are that both the person and the position are already set up in CHRIS. By attaching a person to a position you will change the Position into an occupied position and its icon will change from green to blue .

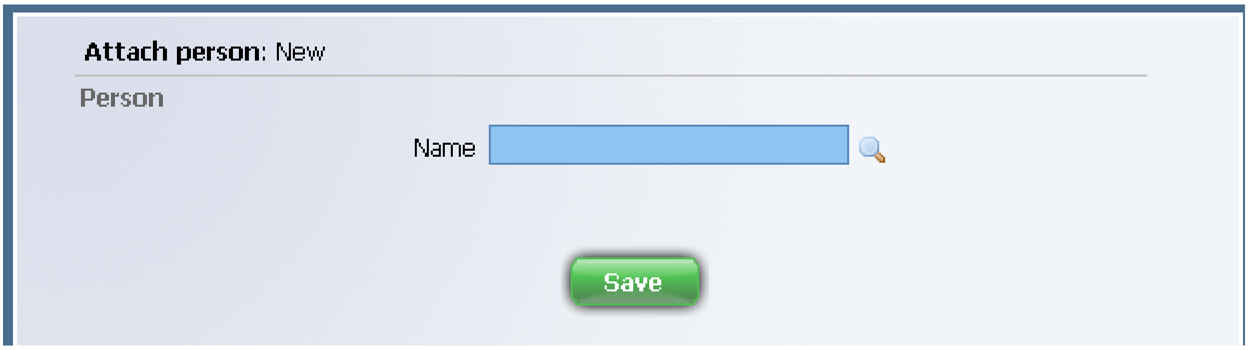
1. Search for and select the vacant position that you wish to fill from mini explorer

   Navigate: Organisation > Position (find the vacant TES Temp pool position)

2. Select Attach person



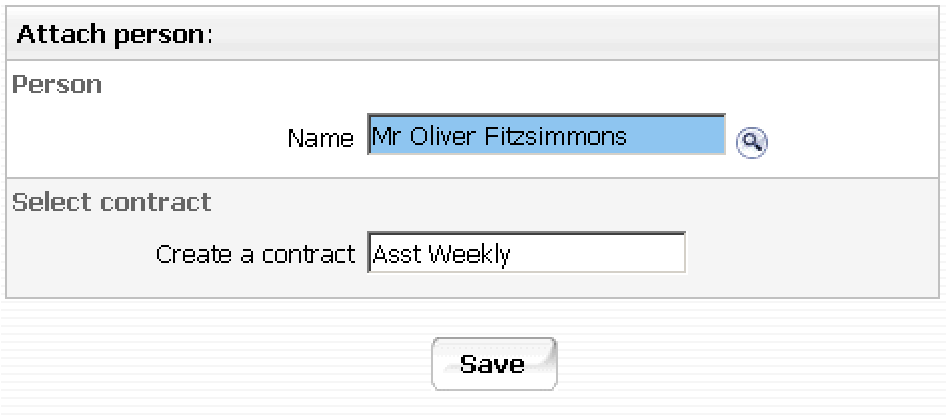
3. Enter the effective date when they should be attached from.
4. Trent opens the Attach person page in the display pane.



5. Click the search icon to search for the person by name or search by personal reference number.

6. Select the person and the select contract option will appear below the name.

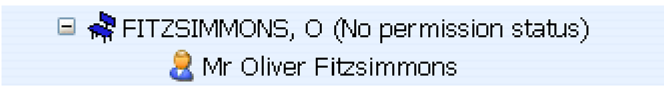
7. Replace the <Enter contract name> with Asst Weekly.



8. Click the 

button.

You will see the person attached to this position in the mini explorer diagram.



Once the person has been attached to the position they can also be attached to payroll and this will generate the position occupancy reference number.

7 Attaching a Person to Payroll

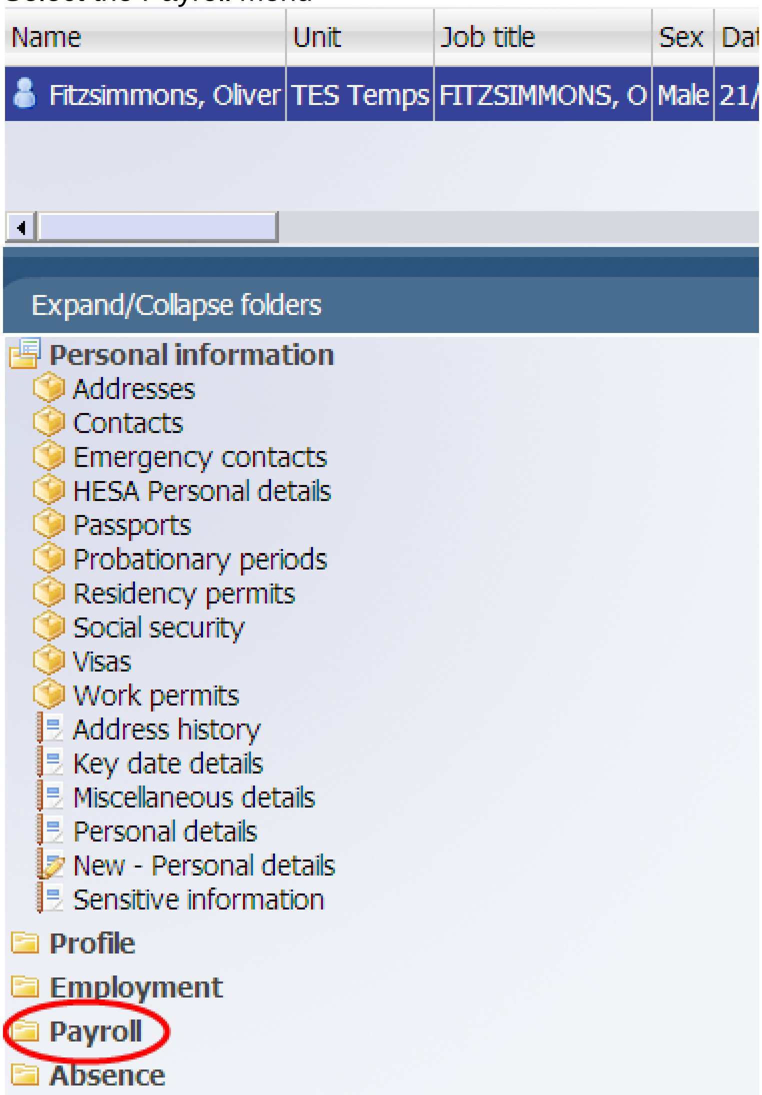
Once the relevant employee details have been added and the person has been attached to the organisation, via the position, you will need to attach the employee to payroll. This is achieved through the Attach to Payroll option found under the Payroll folder within the People area of Trent.

Navigate: Organisation > People > Payroll > Attach to Payroll

1. With the University of Cambridge selected, click on the People menu in the Action Pane.

2. Search for the person using surname or person number and click on the magnifying glass icon (or press return)

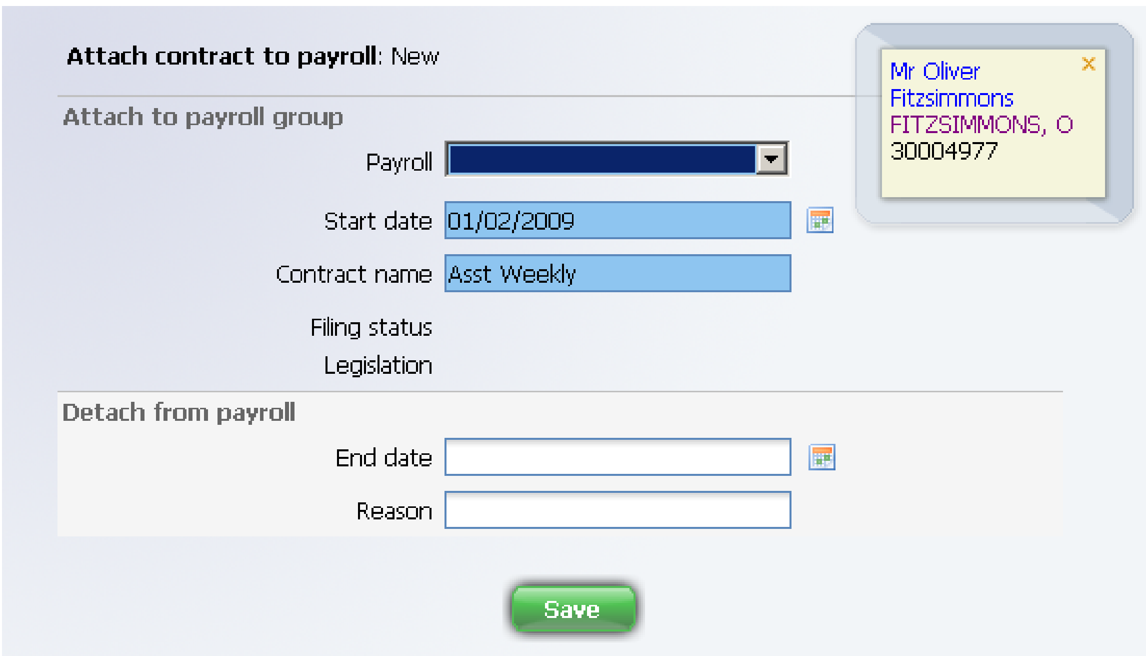
3. Select the Payroll menu



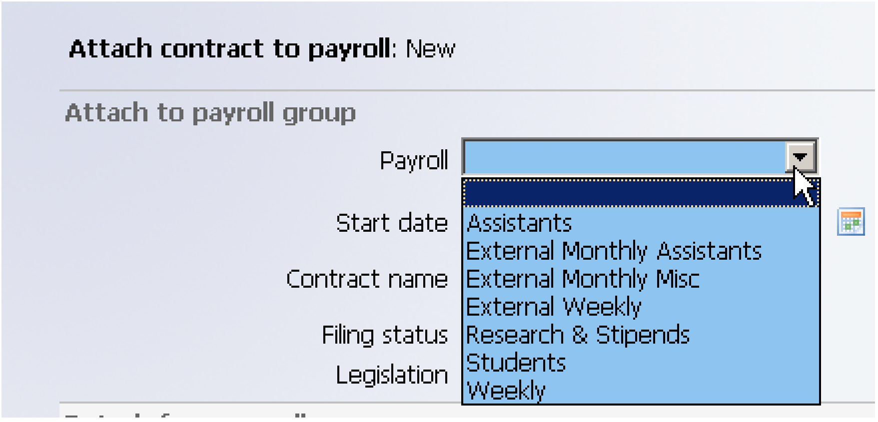
4. Select the Attach to payroll option

5. The contract name will be displayed. Choose Attach contract to payroll

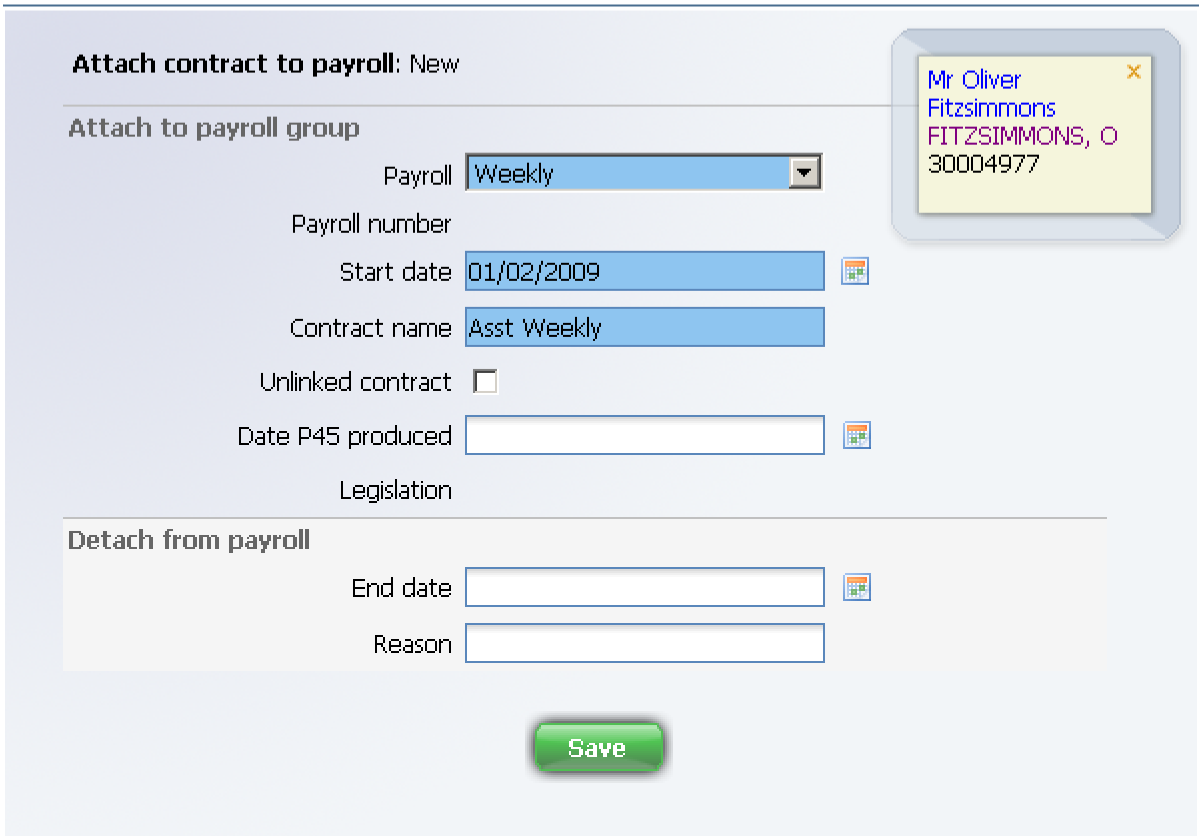
The Attach to payroll screen will be displayed



Click the drop down arrow to the right of Payroll and select the Weekly payroll.

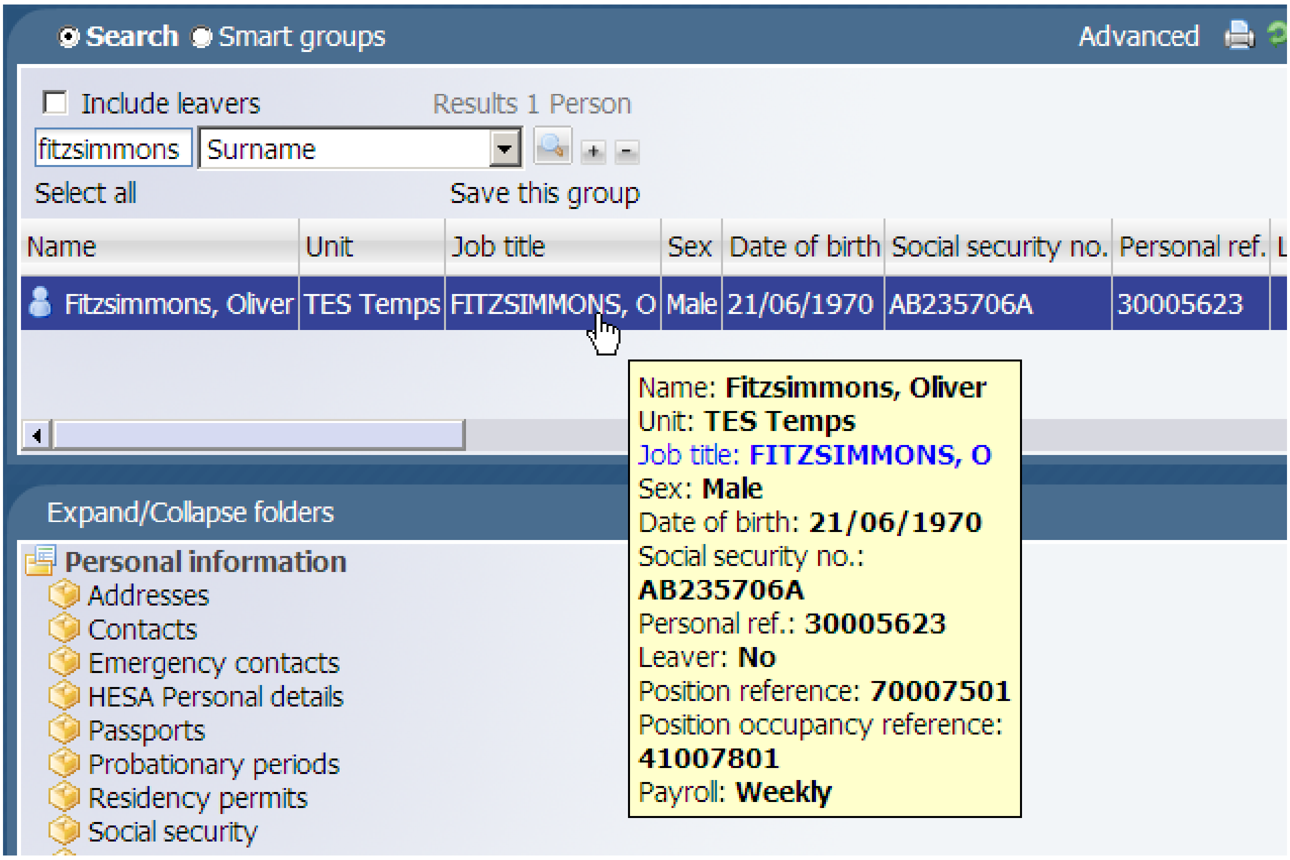


6. Once the payroll has been selected additional options will be displayed



7. Click the Save button

Once you have saved the record, the payroll number will automatically be generated. This will be the same number as the personal reference number. The position occupancy reference number will also be generated.



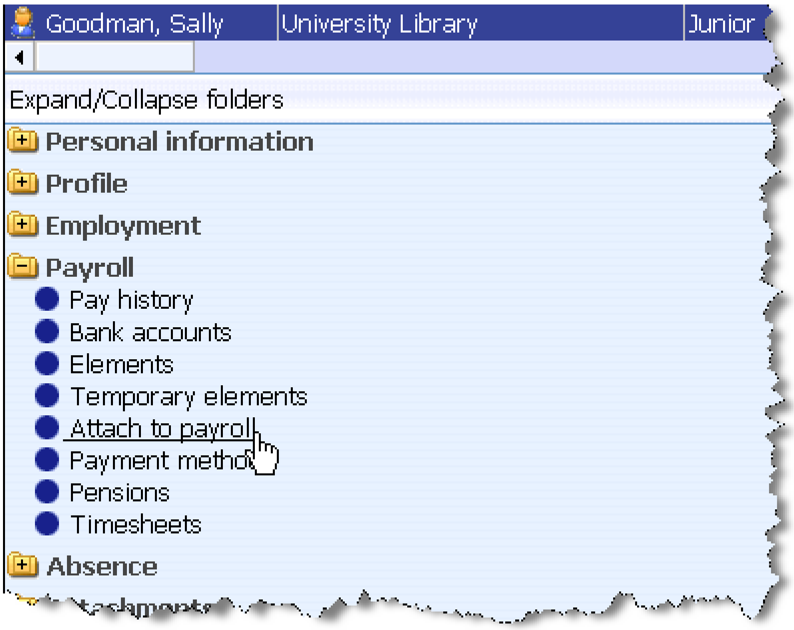
8 Multiple Contracts

Where an individual holds a current position and is to occupy an additional position within the University it must be determined whether the existing contract is appropriate or whether it is necessary to create another concurrent contract.

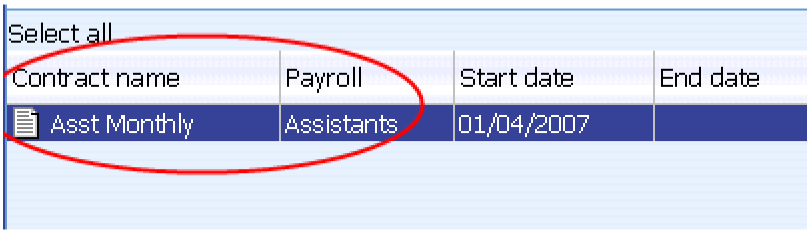
Firstly, establish the existing contract name and the payroll that the employee is attached to. For employees whose data was migrated from SECQUS the contract name will be first initial and surname. For employees whose record has been created in Trent the contract name will be the job title. For newly created records the contract name will be the payroll.

8.1 Contract Name and Payroll

1. Search for and select the person, open the payroll menu and select the Attach to payroll option.



2. The current contract name and payroll will be displayed.



3. Where an employee occupies two positions and multiple contracts are in use two contract names will be seen and two different payrolls.

Select all

Contract name	Payroll	Start date	End date	Le
Asst Weekly	Weekly	16/01/2006		
Students	Students	01/04/2007		

In this example two contracts can be seen, but the affiliated lecturer position is not attached to a payroll as it is an unpaid position.

Select all

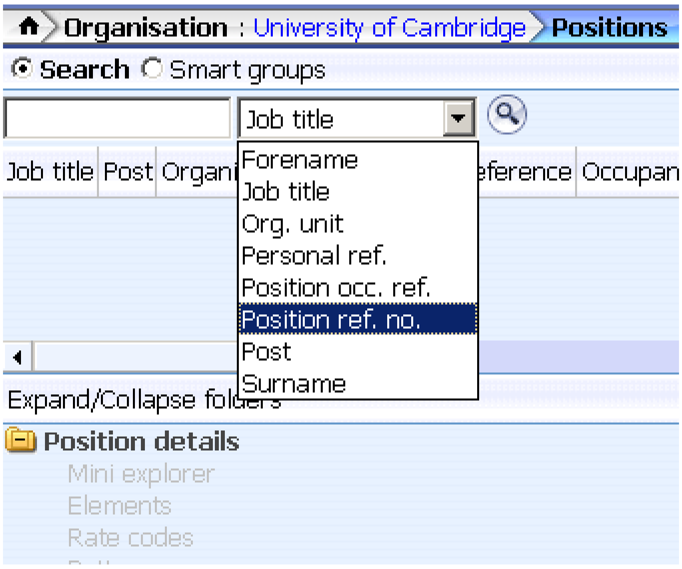
Contract name	Payroll	Start date	End date	Lea
RS Monthly	Research & Stipends	01/04/2007		
RS Monthly				

See section 9 for instructions on creating multiple contracts and when multiple contracts are required.

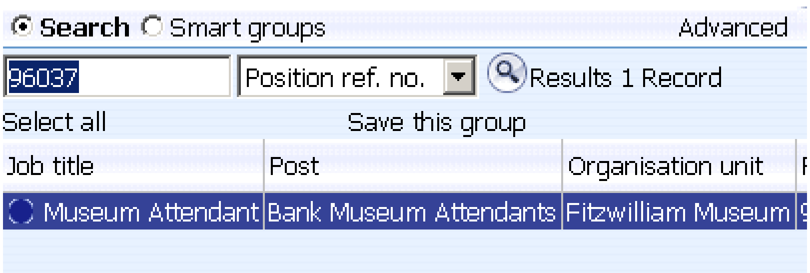
9 Attaching a person to a second position

In many instances, where a person is to occupy an additional position the existing contract should be used rather than creating an additional new one. This will generally be the case if an additional appointment is made where the same payroll is to be used for payment. For example where a part-time Assistant takes on another part-time Assistant role.

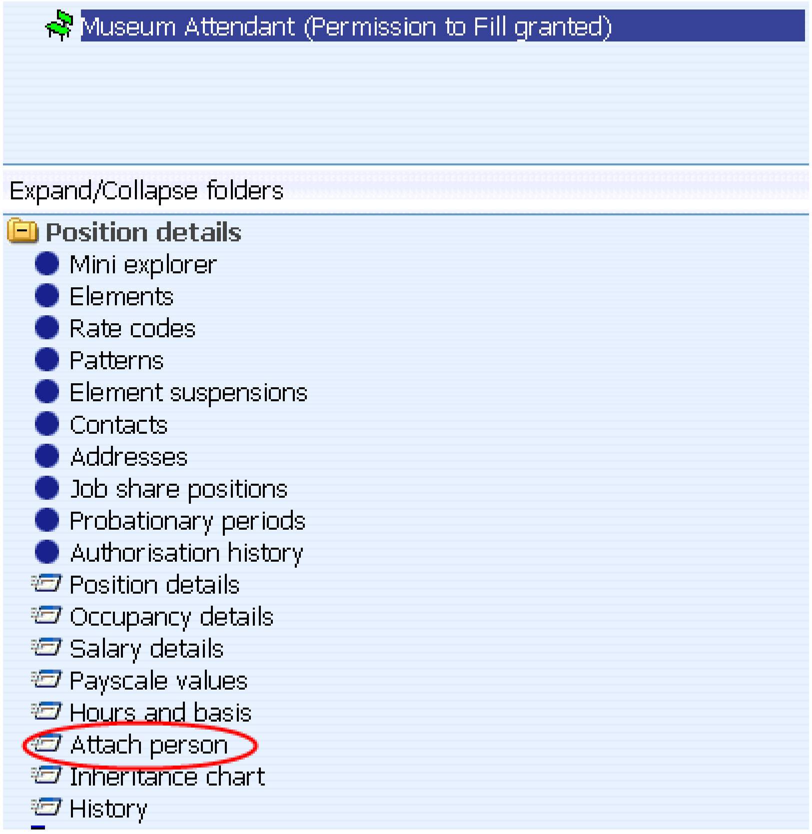
1. With the University of Cambridge selected, click on the Positions menu in the Action Pane.
2. In the search window, select to search by Position ref no.



3. Enter the required Position reference number in the search field and click on the magnifying glass icon (or press return)

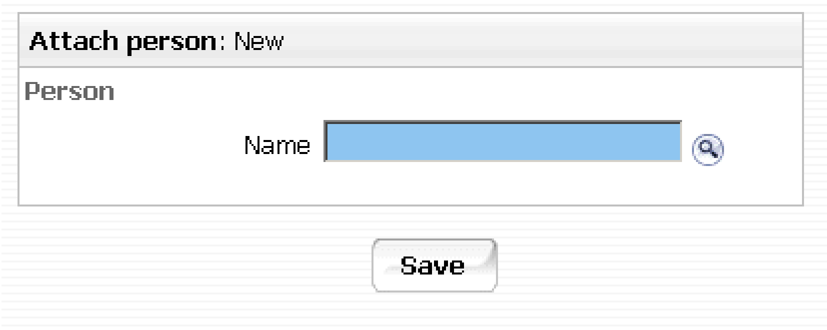


4. Open the Mini Explorer. Select the position and the position details menu will be displayed. Click on Attach person in the action pane.

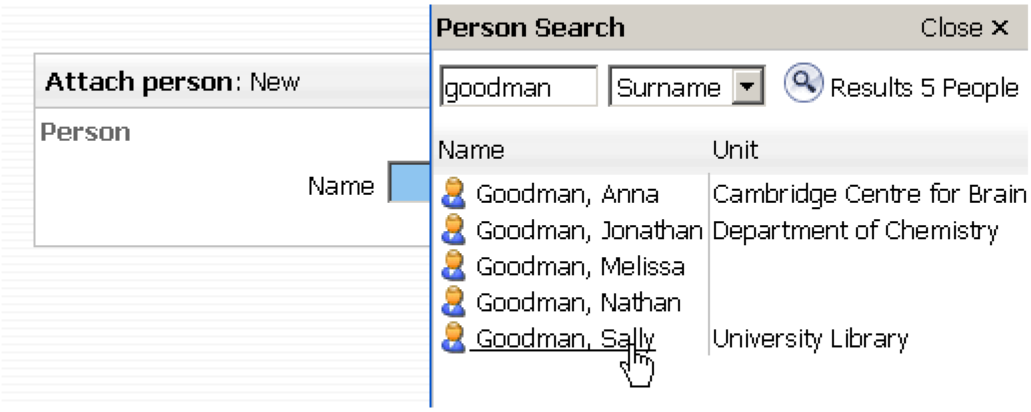


5. Enter the effective date when they should be attached from

6. Trent opens the Attach person page in the display pane

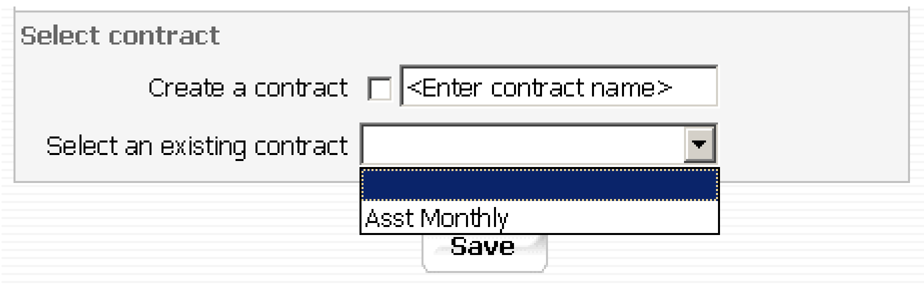


7. Click the search icon to search for the person by name or search by personnel reference number.

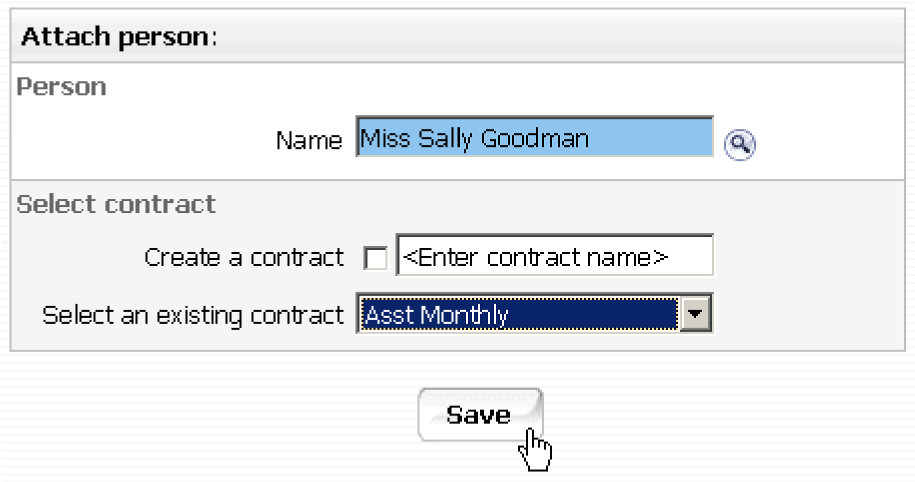


8. Select the required name, and the select contract section of the screen will be displayed.

9. Click the drop down arrow to the right of the 'select an existing contract' field, and select the contract.



10. Click on the Save button



10 Attaching a person to a second position with a second contract name

There are some situations where a person is employed in an additional position and an additional contract should be created. This will be necessary:

- Where a person is to be paid from another payroll with a different frequency
- Where a non stipendiary appointment is made (Affiliated Lecturer, Associate Lecturer, College Appointments, CUP/UCLES Appointments)

The following scenarios would require a second contract to be used:

A student, paid their studentship payment through the students payroll, takes temporary employment with the TES. The TES employment will be paid via the Weekly payroll but the Studentship must be paid via the student payroll. Two attachments are needed, one for each payroll. Hence multiple contracts are needed.

Multiple contracts will be used by the Clerk of the Roll if any of the following appointment types are to be held in conjunction with a University appointment:

College Officer, e.g. Bursar, College Lecturer or
CUP, UCLES employee, e.g. Associate Director, Examination Manager

A person with a paid University appointment takes an additional non stipendiary appointment e.g. Affiliated Lecturer or Associate Lecturer. This additional position is unpaid and therefore requires an additional contract which is not attached to a payroll. Should the paid employment then come to an end before the tenure of the unpaid position a P45 can be produced.

The grid below summarises where a multiple contract should be used.

		Primary Position						
		Students	TES	Weekly Assistant	Monthly Assistant	Research & Stipends	External Payroll	Unpaid
Secondary Position	Students	N	Y	Y	Y	Y	Y	Y
	TES	Y	N/A	N	N	N	N [3]	Y
	Weekly Assistant	Y	N	N	N	N	N [3]	Y
	Monthly Assistant	Y	N [2]	N [2]	N	N	N [3]	Y
	Research & Stipends	Y	N [1]	N [1]	N [1]	N	N [3]	Y
	External Payroll	Y	N [3]	N [3]	N [3]	N [3]	N	Y
	Unpaid	Y	Y	Y	Y	Y	Y	N

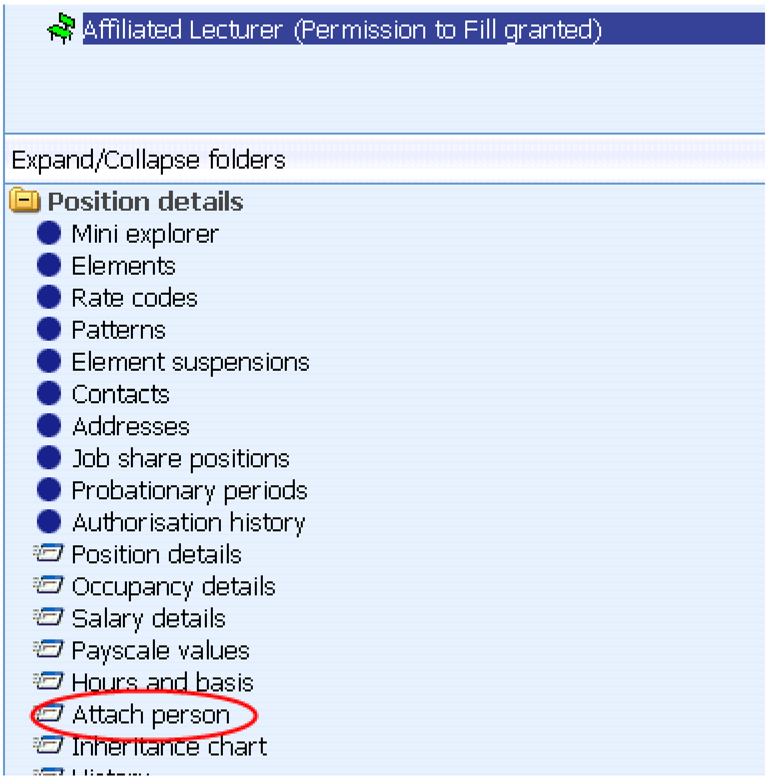
[1] Payroll need to action Payroll transfer to Research & Stipends

[2] Payroll need to action Payroll transfer to Monthly Assistants

[3] Final decision on multiple contracts to be made on case by case basis by Payroll Manager

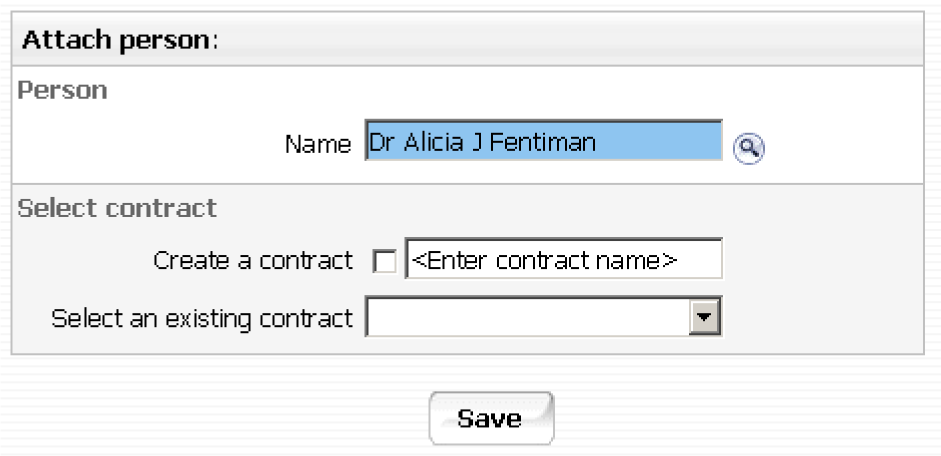
10.1 Attaching a person using an additional contract

1. Follow the instructions above to search for the position
2. Select the position and click on the attach person menu option

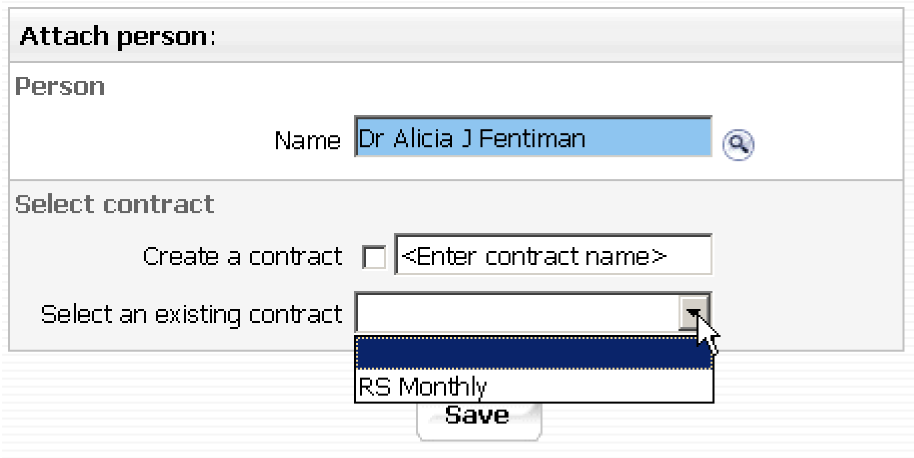


3. Enter the effective date when they should be attached from

   Trent opens the Attach person page in the display pane.
4. Click the search icon to search for the person by name or search by personal reference number.
5. Select the person and the select contract option will appear below the name.

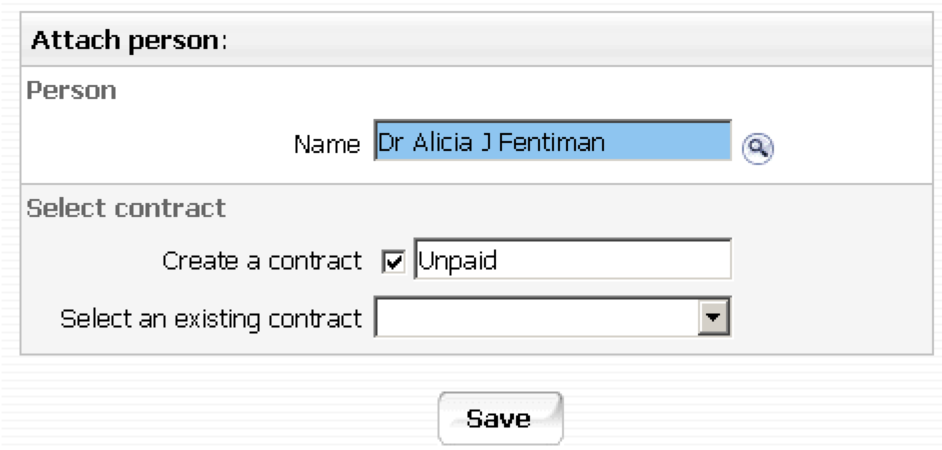


The existing contract name can be viewed by clicking the drop down arrow to the right of ‘Select an existing contract’. This should NOT be selected.



6. Tick the check box to create a contract and replace <Enter contract name> with the name of the payroll it is to be attached to or indicate that it is unpaid. Contract names should be one of the following:

   RS Monthly
   Asst Monthly
   Asst Weekly
   Students
   Unpaid



7. Click the Save button

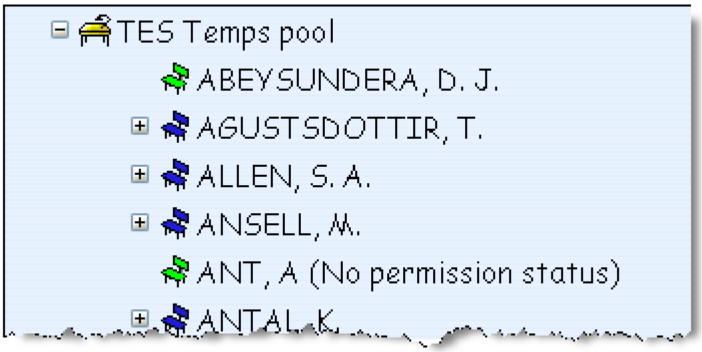
11 Leavers & Transfers

11.1 Notifying Payroll

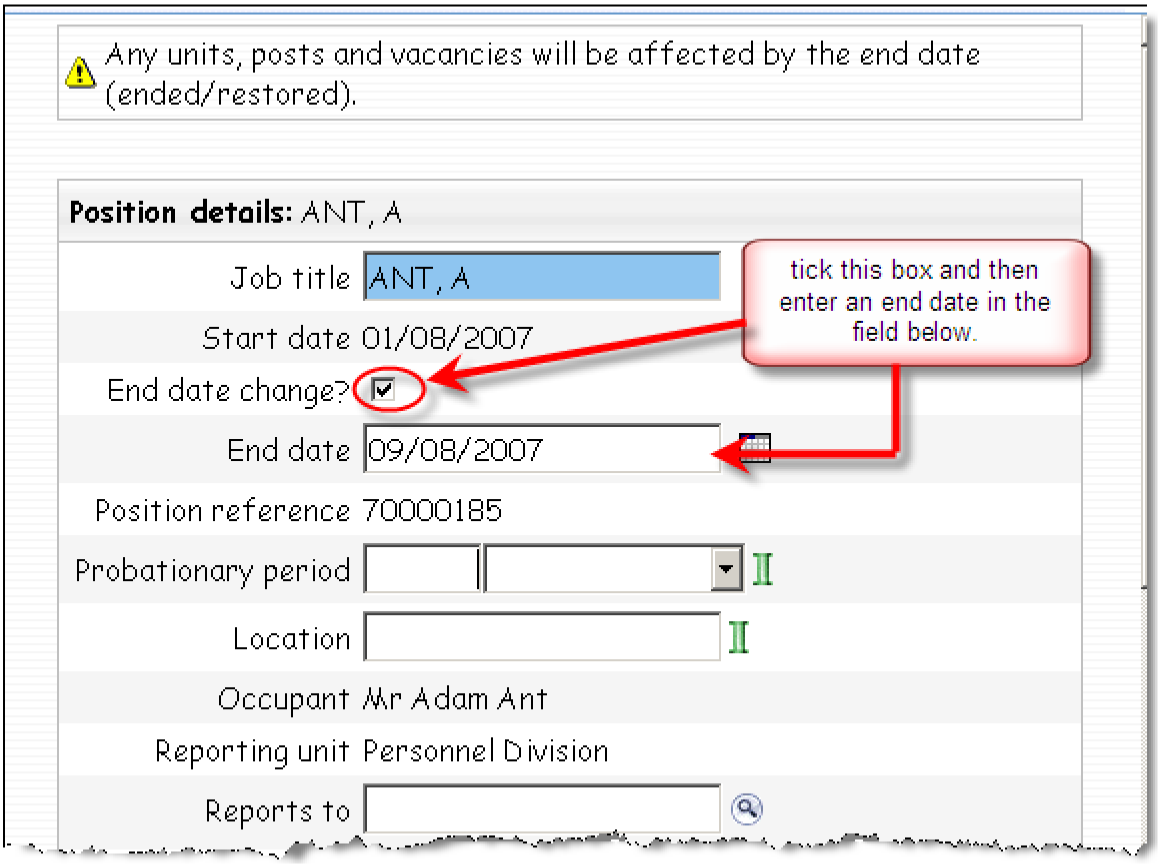
When a TES temp leaves either the University or transfers out of TES to a department an ‘Employee Leaver/Transfer’ form (CHRIS/40) will be completed by the TES office and forwarded to the East Room who will face vet the form to ensure that there are no potential HR issues surrounding their leaving. They will then pass the form to Payroll for processing on the system.

11.2 Ending their unique position

Once the individual has been made a leaver by payroll, their original position will show as vacant in the mini-explorer view, i.e. as a green chair. On a regular basis, perhaps once a month all vacant TES positions should be end dated so they are not displayed in future.



1. Select the position
2. Select the ‘Position Details’ form
3. Tick the little box entitled ‘End date change?’ and the date field below it will become active.
4. Enter the end date for the position
5. Click the Save button


Any units, posts and vacancies will be affected by the end date (ended/restored).
Position details: ANT, A
Job title
ANT, A
Start date 01/08/2007
End date change?
End date
09/08/2007
tick this box and then enter an end date in the field below.
Position reference 70000185
Probationary period
Location
Occupant Mr Adam Ant
Reporting unit Personnel Division
Reports to

