BACKGROUND INFORMATION

Team Leaders now have the ability to cease (end) contracts for current fixed-term employees via the Employee Self Service. The contracts will flow electronically through a number of approval levels following which Payroll will process the contract on the Human Resources (HR) system. The number of approvers can vary, as each Cost Centre has its own customised Cost Centre approval structure.

Team Leaders are given access to a menu called ‘Occupancy Change Request’ in which staff will be listed when their contract is approaching its end date. Contracts which require action will appear 90 days prior to the contract end date.

SCENARIO EXAMPLE

Below are screen shots showing an example of an on-line ‘End of Contract’ (Cease Occupancy) process to give you an idea of the detail that is displayed on the screens available to the Team Leaders and Approvers.

The following example will be based on ‘Mr M Winterbottom’s’ contract of employment not being renewed. For the purposes of this example only, the contract will flow through 3 levels of approval and then be forwarded to Payroll where the contract cessation will be processed on the HR System.

This is a list of the approval levels which will be used in this example.

<table>
<thead>
<tr>
<th>Grant Funded Contracts</th>
<th>Approval Rights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approval Level</td>
<td>Approvers Title</td>
</tr>
<tr>
<td>1</td>
<td>HR Adviser</td>
</tr>
<tr>
<td>2</td>
<td>Grants Officer</td>
</tr>
<tr>
<td>3</td>
<td>Dean of School</td>
</tr>
</tbody>
</table>

Step 1 – TEAM LEADER

An email notification will be sent to the Team Leader 90 days prior to an employee’s contract end date, prompting the Team Leader to log into the ESS and, where a contract cessation is anticipated, initiate the request.

- The Team Leader will ‘log into the ESS’.
- Open the ‘Pilot Development’ folder from the left hand menu.
- Select ‘Occupancy Change Request’. This is where employees whose contract end date falls within 90 days will be listed.
- Select Cease Occupancy ‘Process’.
Step 2 – TEAM LEADER

The Team Leader completes the ‘Cease Occupancy Details’ form. Only those fields which are surrounded by a box can be modified. The cessation date automatically defaults into the record which is the end date of their current contract. This date cannot be changed, if you require an earlier end date please contact HR Client Services.

- The occupancy ‘Cessation Date’ will default to the current contract end date.
- Enter relevant details into the ‘Reason for contract cessation’.
- Select ‘Insert’ to submit the Occupancy Cessation.

A ‘Success!’ message will appear.

The request will now move through the approval levels.

The Team Leader can view the progress/status of the request by selecting ‘Pending Requests’ from the menu on the left.
Step 3 – APPROVER (HUMAN RESOURCES)

An email notification is sent to the 1st level of approval.

- The HR Adviser selects the ‘Approve Requests’ menu in the ESS.
- To approve the transaction, the HR Adviser selects ‘Record ID’.

The HR Adviser has the option to select ‘Recommend Approval’ or ‘Reject’.

- ‘Recommend Approval’ will escalate the contract cessation to the next level of approval.
- ‘Reject’ will send the contract cessation back to the Team Leader for modification if necessary.

A comment, if relevant, may be entered by the HR Adviser which will be visible to the next level of approval only.

If the details of the proposed new contract meet HR requirements, the HR Adviser will select ‘Update’ and a ‘Success!’ message will appear.
An email is then sent to the Team Leader to confirm that the 1st level approver has actioned the request. This information can also be viewed in the Team Leader’s ‘Pending Requests’ menu.
Step 4 – APPROVER (FUNDING APPROVAL)

An email notification is sent to the 2\textsuperscript{nd} level of approval (this scenario assumes a non-recurrent funded contract).
- The Grants Officer selects the ‘Approve Requests’ menu in the ESS.
- To approve the transaction, the Grants Officer will select ‘Record ID’.

The Grants Officer has the option to select ‘Recommend Approval’ or ‘Reject’
- ‘Recommend Approval’ will escalate the contract cessation to the next level of approval.
- ‘Reject’ will send the contract cessation back to the Team Leader for modification if necessary.
A comment, where relevant, may be entered by the Grants Officer which will be visible to the next level of approval only.

- The Grants Officer will select ‘Update’ if all details are correct and a ‘Success!’ message will appear.

An email is then sent to the Team Leader confirming that the 2\textsuperscript{nd} level approver has actioned the request. This information can also be viewed in the Team Leader’s ‘Pending Requests’ menu.
Instructions – End a Fixed-Term Contract

Step 5 – APPROVER (DEAN OF SCHOOL)

An email notification is sent to the 3rd level (in this scenario, the last level) of approval.

• The Dean selects the ‘Approve Requests’ menu in the ESS.
• To approve the transaction s/he selects ‘Record ID’.

The final level of approval has the ability to ‘Approve’ the transaction (instead of recommend approval) or ‘Reject’.

• ‘Approve’ will forward the contract cessation to Payroll for processing.
• ‘Reject’ will send the contract cessation back to the Team Leader for modification if necessary.

• If all details are approved, the Dean will select ‘Update’ and a ‘Success!’ message will appear.

An email is then sent to the Team Leader to confirm that the 3rd level approver has actioned the request.
Once a contract cessation is approved, the transaction will no longer be visible in the Team Leader’s ‘Pending Requests’ menu, but the status will be displayed on the Team Leader’s ‘Occupancy Change Request’ screen as ‘Approved’.

Payroll is then notified that the contract cessation is ready to be processed.

Once Payroll has processed the contract cessation on the HR System, the employee details will no longer appear in the Team Leader’s ‘Occupancy Change Request’ screen.