BACKGROUND INFORMATION

Team Leaders now have the ability to offer new contracts to 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.

In system terms, an ‘Occupancy’ is a record of an individual’s employment details on the HR System. By offering an employee a ‘New Contract’, you (as Team Leader) are effectively adding a new line to the employee’s occupancy within the HR System. As you go through the process, you will see the words ‘New Occupancy’, which in essence is the offer of a ‘New Contract’.

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 ‘New Contract’ (New Occupancy) process to give you an idea of the detail that is displayed on the screens available to the Team Leaders, Approvers and the Employee.

The following example will be based ‘Mr J Courtney’ being offered a new contract of employment. For the purposes of this example only, the contract will flow through 3 levels of approval before the employee will be asked to accept the new contract. Once the contract is accepted, Payroll will process the new contract on the HR System.

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

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>Approvers Title</th>
<th>Recommend Approve</th>
<th>Approve</th>
<th>Reject</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>HR Adviser</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>2</td>
<td>Grants Officer</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>3</td>
<td>Dean of School</td>
<td>No</td>
<td>Yes</td>
<td>Yes</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 new contract 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 New Occupancy ‘Process’.

![Screen shot of Occupancy Change Request form]
Step 2 – TEAM LEADER

The Team Leader completes the ‘New Occupancy Details’ form. Only those fields which are surrounded by a box can be modified. Team Leaders have the ability to compare the current contract details against the new contract details. The commence date automatically defaults into the new record and this will always be the day after the current contract end date.

- Select the New Occupancy ‘Cessation Date’ from the drop down calendar.
- ‘Position Fraction’ – this will default to the current position fraction but can be changed if required. (Note: If position fraction is changed, please confirm days and hours to be worked in the ‘Additional relevant information’ box).
- Select the ‘Occupancy Commence Reason’ code from the drop down menu. For this purpose, this will always be ‘NC – New Fixed-Term Contract’.
- Select the relevant ‘Purpose of Occupancy’ code from the drop down menu.
- Enter relevant details into the question boxes:
  - Location (Major Cost Centre, then School or Division or Department)
  - Supervisor title, name and position title
  - Visa status – either Australian resident or, where appropriate, visa subclass type and visa end date.
- Enter any ‘Additional relevant information’ (e.g. work pattern if part-time).
- Select ‘View or Change Account Codes’ to change and update the salary account number, if required.
- Select ‘Insert’ to submit the New Occupancy Details - a ‘Success!’ message will appear.

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**DEMO Area**  
**Person: 003966, Murray Walker**  
Job: 01, HR Manager

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**Occupancy Change Request - New Occupancy Details**

**Person ID:** 634931  
**Job:** 05  
**Name:** PFJ Courtney

<table>
<thead>
<tr>
<th>New Occupancy</th>
<th>Current Occupancy</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUB - Substantive Employment</td>
<td>SUB - Substantive Employment</td>
</tr>
<tr>
<td>Commence Date: 08-APR-2010</td>
<td>Commence Date: 07-APR-2010</td>
</tr>
<tr>
<td>Cessation Date: 20-Jan-2010</td>
<td>Cessation Date: 07-APR-2010</td>
</tr>
<tr>
<td>Position Title: SNA00556600, Driver</td>
<td>Position Title: SNA00556600, Driver</td>
</tr>
<tr>
<td>Award: HRGS - General Salaried Staff</td>
<td>Award: HRGS - General Salaried Staff</td>
</tr>
<tr>
<td>Classification: HIRO - HIGHER EDUC OFFICER LEVEL 8</td>
<td>Classification: HIRO - HIGHER EDUC OFFICER LEVEL 8</td>
</tr>
<tr>
<td>Salary Step: 04</td>
<td>Salary Step: 04</td>
</tr>
<tr>
<td>Position Fraction (0-100): 00</td>
<td>Position Fraction (0-100): 00</td>
</tr>
<tr>
<td>Occupancy Commence Reason: NC - New Fixed Term Contract</td>
<td>Occupancy Commence Reason: NC - New Fixed Term Contract</td>
</tr>
<tr>
<td>Occupancy Status: FTP - Fixed Term Fractional Time</td>
<td>Occupancy Status: FTP - Fixed Term Fractional Time</td>
</tr>
<tr>
<td>Proficiency (0-100):</td>
<td>Proficiency (0-100):</td>
</tr>
<tr>
<td>*Purpose of Occupancy:</td>
<td>*Purpose of Occupancy:</td>
</tr>
<tr>
<td>Discard Pattern: (Please do not change)</td>
<td>Discard Pattern: (Please do not change)</td>
</tr>
<tr>
<td>*Please enter Location - Major Cost Centre:</td>
<td>*Please enter Location - Major Cost Centre:</td>
</tr>
<tr>
<td>- School / Division / Department:</td>
<td>- School / Division / Department:</td>
</tr>
<tr>
<td>- Day to day Supervisor Title &amp; Name:</td>
<td>- Day to day Supervisor Title &amp; Name:</td>
</tr>
<tr>
<td>- Supervisor Position Title:</td>
<td>- Supervisor Position Title:</td>
</tr>
<tr>
<td>*If individual is an Australian Citizen/Resident enter Australian Citizen</td>
<td>*If individual is an Australian Citizen/Resident enter Australian Citizen</td>
</tr>
<tr>
<td>If not, does individual have a valid visa with work rights? Enter Yes or No.</td>
<td>If not, does individual have a valid visa with work rights? Enter Yes or No.</td>
</tr>
<tr>
<td>If yes, please indicate the visa end date.</td>
<td>If yes, please indicate the visa end date.</td>
</tr>
<tr>
<td>If employment is fixed term and an increment to the next step of the salary scale is due on the commence date, please indicate Yes or No.</td>
<td>If employment is fixed term and an increment to the next step of the salary scale is due on the commence date, please indicate Yes or No.</td>
</tr>
<tr>
<td>If employment is fixed term, will any allowances currently being paid continue for the new contract? Enter Yes or No.</td>
<td>If employment is fixed term, will any allowances currently being paid continue for the new contract? Enter Yes or No.</td>
</tr>
<tr>
<td>If yes, please indicate allowance types.</td>
<td>If yes, please indicate allowance types.</td>
</tr>
<tr>
<td>Enter any additional relevant information: (e.g. If employment is fixed term and part-time, confirm days &amp; daily hours to be worked in a pay fortnight, etc.)</td>
<td>Enter any additional relevant information: (e.g. If employment is fixed term and part-time, confirm days &amp; daily hours to be worked in a pay fortnight, etc.)</td>
</tr>
</tbody>
</table>

* Denotes Mandatory Field

Warning: Submitting this transaction will request that a new occupancy is created for this employee based on their current entered.

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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.
Instructions – Offer a Fixed-Term Contract

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 new contract to the next level of approval.
- ‘Reject’ will send the new contract 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 2nd level of approval (this scenario assumes a non-recurrent funded new 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 new contract to the next level of approval.
- ‘Reject’ will send the new contract back to the Team Leader.

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 2nd level approver has actioned the request. This information can also be viewed in the Team Leader’s ‘Pending Requests’ menu.
Instructions – Offer 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’.

### DEMO Area

**Person: 015320, Dean of School Approver 3**

**Job: 01, Dean of School**

**Approve Requests**

- **Click on ‘Record ID’ to view the full details of a transaction and act on the request.**

#### Occupancy Change Request - New Occupancy Details

<table>
<thead>
<tr>
<th>Approval Status</th>
<th>Record ID</th>
<th>Requested by Supervisor</th>
<th>Requested By Employee</th>
<th>Occu. Type</th>
<th>Commence Date</th>
<th>Cessation Date</th>
<th>App. Level</th>
<th>Escalated to you By</th>
<th>Created Date</th>
<th>To Be Actioned By</th>
<th>Recommended</th>
<th>Reesgn</th>
<th>Resign</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prof. M Walker</td>
<td>SUB</td>
<td>Mr J Courtney</td>
<td>23-Mar-2010</td>
<td>30-Jun-2010</td>
<td>23-Mar-2010</td>
<td>65-Apr-2010</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

- ‘Approve’ will forward the new contract to the employee for ‘Acceptance’ or ‘Decline’.
- ‘Reject’ will send the new contract back to the Team Leader to review the issues and restart the process.

**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 new contract 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 – Awaiting Acceptance’.
Instructions – Offer a Fixed-Term Contract

Step 6 – EMPLOYEE - OFFER OF CONTRACT

The employee is sent an email notification when the ‘New Contract’ is approved.

- The employee will log into the ESS, select ‘Occupancy Change Notification’ and select ‘Accept/Decline’.

Note: The system will not allow Payroll to process the new contract until the employee has accepted the terms and conditions of the new contract.

- The employee is asked to read the ‘Terms and Conditions’ (link) and then either ‘Accepts’ or ‘Does Not Accept’ the Offer of a new fixed-term contract.

If the employee accepts, s/he will select ‘Update’ and a “Success” message will appear.

An email is sent to the Team Leader once the employee ‘Accepts’ or ‘Declines’ the new contract.
The Team Leader can see that the contract has now been approved and accepted via their ‘Occupancy Change Request’ screen.

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

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