8 Reviewing Position Details

8.1 Process Overview

The Review Position process chain encompasses many of the Trent forms that allow you to add key data into the database. The following diagram shows the forms encountered in the chain.

Attaching a person to a position will change the Position into an occupied position and its icon will change from green 🌿 to blue 🔵.
8.2 Starting the Process

Navigate: Organisation > Positions > Process Chaining > Process Chaining

1. Select the University of Cambridge organisation
2. Select the Positions menu item from the Action Pane. Use the search options to locate the position to be reviewed. The position will be displayed as a green (vacant) chair.
3. Select the Process Chaining menu from the Action pane

![Position details]
- Costing
- Terms & Conditions
- Recruitment
- Profile
- Attachments
- User defined forms
- Process chaining

![Process chaining]

4. Select the Process Chaining option and type in the required date in the effective date field.
5. The resulting form will allow you to select the required Process Chain from the picklist available.

6. Select Position review (graded) or position review (ungraded) as appropriate.

The following screen prints show the Position Review (graded), the screens are the same for both chains with the exception of step 2.
7. Once the required process is selected, click on the Start button to commence the process. The first step will then be presented (Position Details).

8. Enter the Probation period for the position.

9. Check that the Reporting Manager information is correct.

10. Check that the Position Status is set to Permission to Fill Granted, this will authorise automatically for new positions.

11. Click the button. The record will be saved and the new position details will be displayed in the object pane.
8.3 Payscale Values

1. Click on the Next Step button, this will present you with the form used to check/enter the salary information.

![Form](image)

2. Ensure the Grade and payment table are correct, this information will be inherited from the Post. Select the appropriate point for the new position from the FT Salary drop down box, and enter the next increment date. (You will now need to do this for Assistant staff too!)
Where the salary is within the normal range for the grade the override maximum should be set to the grade maximum and the FT Salary point will be less than or equal to the grade maximum.

Where the salary is on a contribution point the FT Salary point should be equal to the override maximum.

Where a personal bar is set the override maximum and the FT Salary point should be less than the grade maximum.

3. Click the **Save** button
8.4 Costing Details

1. Click on the Next Step button, this will present you with the form used to check/enter the costing information.

2. Again, this information will be inherited from the Post and should not require changing unless the New Appointment Request Form is accompanied by an Amendment of Post or Appointment form.
   (N.B. Vacant posts are not being migrated with any costing information)
8.5 Hours and Basis Details

1. Click on the Next Step button, this will present you with the form used to view/enter the Hours and Basis information.

2. These details should be inherited from the Post, but ensure the all the relevant data is entered (Contractual Hours, FTE Hours, Category, etc)

3. Click the button
8.6 Working Pattern Details

1. Click on the Next Step button, this will present you with the form used to view/enter working pattern information.

2. The information viewed will be that inherited from the Post. If the working pattern is different at position level, details can be amended here.

3. Click the button
8.7 Address details

1. Click on the Next Step button, this will present you with the address details

![Image of address details form]

2. This address will be the main institutional address and can be changed where the employee will work at a location different to this. The source of information is the Place of Work section of the New Appointment Request Form.

3. Click the [Save] button
8.8 Terms and Conditions Details

1. Click on the Next Step button, this will present you with the inherited Terms and Conditions items.

<table>
<thead>
<tr>
<th>Terms &amp; Conditions item</th>
<th>Choice</th>
<th>Pack</th>
</tr>
</thead>
<tbody>
<tr>
<td>OSP - Sickness</td>
<td>Occupational Sickness Scheme</td>
<td></td>
</tr>
<tr>
<td>Faculty Membership</td>
<td>No Faculty</td>
<td></td>
</tr>
<tr>
<td>Competent Authority</td>
<td>Council</td>
<td></td>
</tr>
<tr>
<td>OMP</td>
<td>Occupational Maternity Scheme</td>
<td></td>
</tr>
<tr>
<td>Final Salary Scheme</td>
<td>USS</td>
<td></td>
</tr>
</tbody>
</table>

2. You will need to click on a Terms and Condition entry, (which will be inherited from the relevant Post), to view the details of step 7 of the screen chain.

3. Click the button
8.9 Check details

1. The final step of the position review screen chain displays check details.

2. If the position requires a check (in addition to the Right to Work check that will be a requirement for all) to be carried out click the drop down arrow to display the list.

3. Select the required check. Check the essential box and add the start date

4. Click the Save button

Use the navigation trail to exit from the screen chain once compete.
8.10 Position Review (Ungraded)

The process for reviewing details of an ungraded position is similar to that used for the graded position review, with the following differences.

8.10.1 Starting the Process

The process can be found in the same place, but you need to select the Position Review (ungraded) process.

8.10.2 Salary Details

The form used to enter salary details (step 2) is Salary Details and not the Payscale Values form.

Enter the salary for the position and the frequency from the drop down box

Click the Save button.