

This page provides guidance on common tasks undertaken by the TES and Payroll teams when using the Temporary Employment Service application. Clicking on any of the hyperlinks will open the online help guide allowing you to view further guidance details.

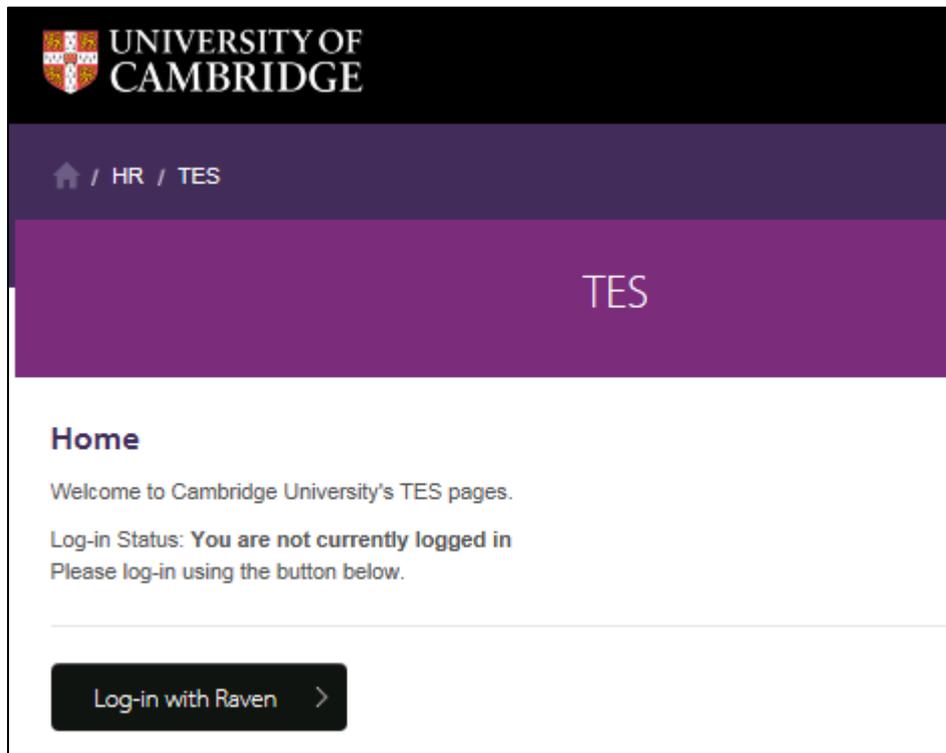
The guide is divided into questions. Use **Ctrl+Click** to navigate to the advice you need:

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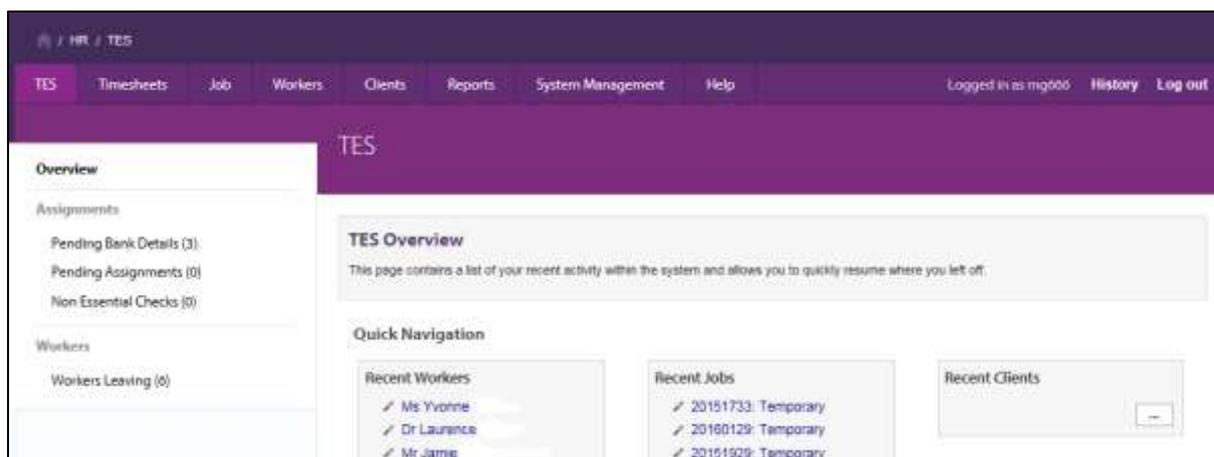
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### How do I log in?

Use your Internet browser to navigate to <https://hrsystems.admin.cam.ac.uk/tes-webapp>.



Log-in with Raven and you should see your home screen:



From here you can use the tabs to access Clients, Jobs, Workers, Timesheets and Reporting:



If you are a Payroll team user you will see only the relevant parts of the application, primarily the Payroll tab at the top of the screen:

If you have any queries about how to logon and your access rights, please contact the Service Desk on <http://www.ucs.cam.ac.uk/support/service-desk/>

## What Job Type should I use when setting up a job?

You will need to use 'Assistant CS (36.5 hours per week)' as standard for all jobs to start with. This may change in future but you will then be advised separately.

## What format is used for the Job Reference number in the new application?

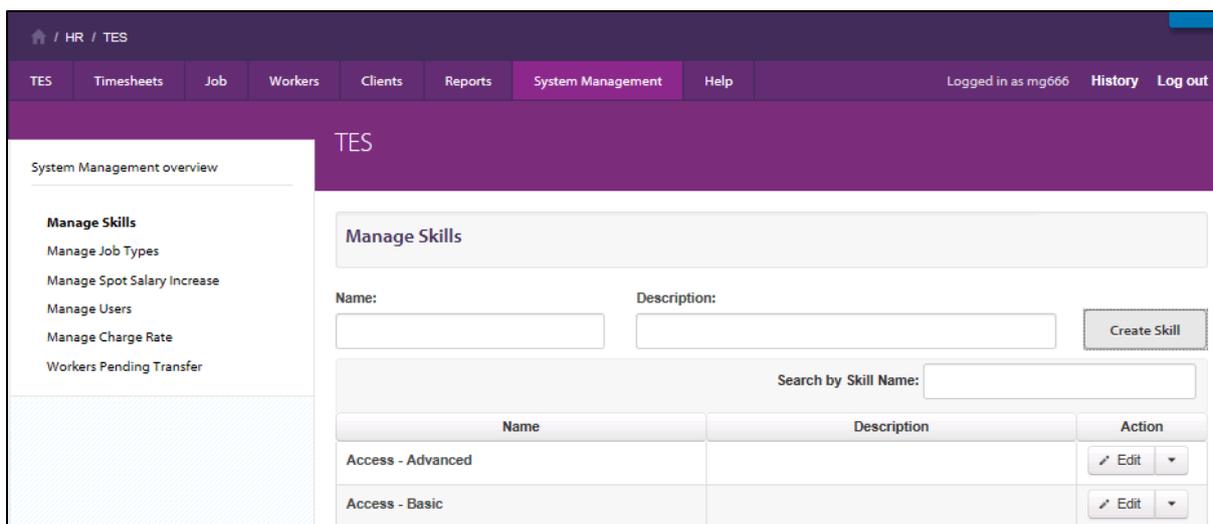
The existing Access database uses 2 sets of 4 digits separated by a / slash as the job reference. The job reference when brought across from Access is reformatted without the slash.

New job references generated in the TES application will be generated in the format YYYY1xxx. E.g. 20161001.

This will lead to a slight anomaly for a while on the submitted paper timesheets as some workers will use a / and some will not.

## How do I add different levels for a skill?

You will need to reflect the difference in skill levels in the description field as show below:



Future release of the application may extend the capabilities in this area so that you can record scores.

### **Why do all of the roles need to be set-up when the job is created?**

The roles are used by the application when generating letters. When release two goes live (with workers entering their own time) then the timesheet authoriser will be the person who receives the notification to approve the timesheet before it is passed to the TES team.

The person who sends in the request should be added as all three of:

- Key Contact;
- Assignment agreement contact; and
- Invoice contact.

The reports to person should be added as both:

- Supervisor; and
- Timesheet authoriser.

If you only have one contact person then this person should be set-up in all of the roles for the job.

### **How are roles used within the application?**

If you are setting up a new job then the roles should be assigned according to the following rules.

The person who sends in the request should be added as all three of:

- Key Contact;
- Assignment agreement contact; and
- Invoice contact

The reports to person should be added as both:

- Supervisor; and
- Timesheet authoriser.

### **Why are jobs set-up earlier on the new application and does this affect the 9-month rule?**

The job is set up earlier so it can be matched to. This isn't a problem for the 9 month rule as the job can be set up with a start date and if the person starts at a later date the assignment can have a later start date, which is what will display for the worker in the assignment.

### **How will we know what to enter for the relationship of an emergency contact?**

This information is not currently requested from the worker. The current TES form will be revised to add this question.

### What working hours should I enter for a Tier 4 worker?

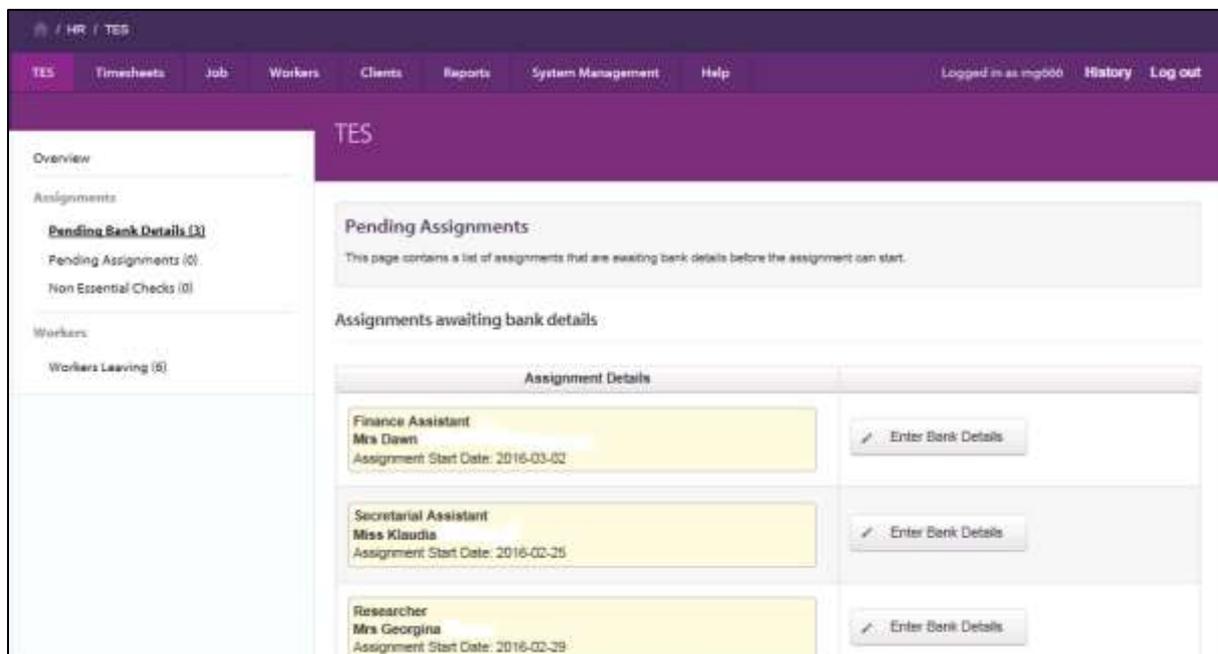
For example, for a Payroller who is a Research Assistant with a Tier 4 right to work that is restricted to 20 hours.

If you know the actual working pattern then you should enter it. Otherwise, you should use the pattern 'Full week Monday – Friday'.

### I do not have any bank details yet for the worker, can I still assign them?

Yes, you can still set up the worker and assign them to a job. You can then generate the assignment agreement.

If there are no bank details present when the worker record is saved, then an entry for the worker will be set-up in the pending bank details list on the TES home screen:



Once the details have been received and entered the record will synchronise with CHRIS and the worker will be added to the payroll.

### How do I determine whether a worker should be a 'Payroller'?

To answer the question 'Payroller?' under worker use the following rules:

- If the worker is currently registered in the temp pool then the answer should be recorded as 'no'.
- If the workers assignments indicate that they are only one of or a combination of any of 'NMH, Intern or Payroller' then the answer should be recorded as 'yes'.

### How have worker email addresses been transferred from Access?

If the address is a recognised University email address then the email address was brought across into the work email. The following are allowed as University / NHS addresses:

Email addresses ending in:

- @cam.ac.uk
- .cam.ac.uk
- @nhs.uk
- .nhs.uk
- @nhs.net
- @newton.ac.uk
- @cambridgeesol.org
- @cambridgeassessment.org.uk
- @cambridge.org
- @ucles.org.uk
- @adctheatre.com
- @ocr.org.uk
- @bioresource.nih.ac.uk
- @cie.org.uk

Addresses in any other format were transferred into the personal email address field.

### What passport details do I need to record?

The issuing country field must be completed no matter what right to work evidence is presented.



The screenshot shows a form titled "Passport Details". Below the title is a label "Issuing Country:" followed by a dropdown menu. The dropdown menu currently displays the text "--- Please select ---" and has a small downward-pointing arrow on the right side.

A worker may present a national identity card or a birth certificate and NI number rather than a passport but it should still be possible to identify their nationality from their documents though and the Issuing country field should be completed no matter what documents have been presented.

### How are bank details validated?

Some initial validation for length of field and format will be done when you enter the information in TES.

Once the bank details have been entered they will be transferred to CHRIS and then become subject to the normal validation checks during the payment process. For example, the payroll checks validate that the bank account number exists for the banking organisation and branch represented by the sort code.

For security reasons, once the bank details have been passed to CHRIS they cannot be re-entered. The payroll team will therefore need to take responsibility for correction within CHRIS and will contact the TES team outside of the system regarding issues with the details provided.

### **How can I identify the correct job when generic job titles may be in use?**

There are potential problems with generic job titles such as Research Assistant where there are many within the same department and could therefore be difficult to match the correct worker with the correct job. It may be necessary to note the job reference number on the paperwork initially and for the future more meaningful job title may need to be adopted.

### **What expected end date should I use for NMH assignments?**

The system requires an expected end date for all jobs and assignments but the NMH assignments do not come with an expected end date. This may change in future but for now use 9 months after the start date.

### **Why is the Assignment Agreement Letter much briefer in the new application?**

There is an attachment that needs to be sent out with the letter. The letter has the personal details and then generic T&Cs need to be attached from the stock pile in the office. This is the same process that contracts now use.

### **What is filled in as the 'Reports to' person for an assignment agreement?**

When you set-up a job the reports to person should be added as both:

- Supervisor; and
- Timesheet authoriser.

The Job supervisor role will then be used when generating the assignment agreement

### **Who will sign the letters?**

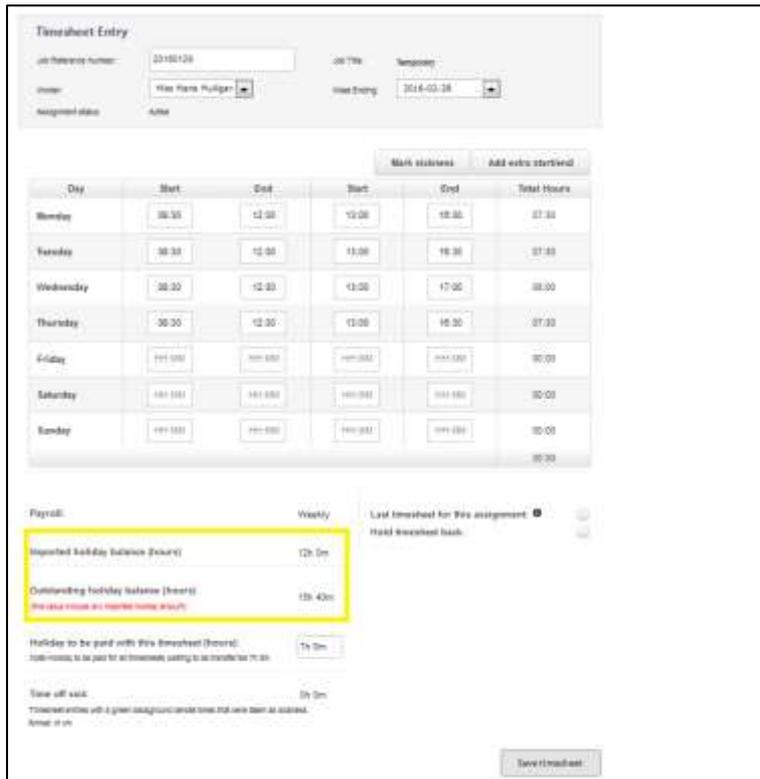
All of the letters will have the TES Team Leaders name on them. When responses come back to the team it will therefore not be obvious which person assigned the job. TES internal process will therefore be modified so that it is clearer who within the team issued what letters.

### **Who are shown as manager and supervisor on the client letter?**

Roles are set up for each job when it is created. The roles are then used within the letters. There is an assignment agreement contact and a timesheet authoriser role. These could be different people and if so then the letter will show both names.

### **Where can I see the holiday position for a worker?**

This can be seen on the timesheet for the worker:



**Timesheet Entry**

Job Reference Number: 23102128    Job Title: Temporal    Tempcode:

User: Alex Hans-Pullgar    Start Date: 2014-03-28

Assignment date: Active

Buttons: Mark absence, Add extra start/end

Day	Start	End	Start	End	Total Hours
Monday	08:55	12:00	13:00	16:30	07:55
Tuesday	08:30	12:00	13:00	16:30	07:30
Wednesday	08:30	12:30	13:00	17:00	08:00
Thursday	08:30	12:30	13:00	16:30	07:30
Friday	09:00	12:00	13:00	16:30	06:00
Saturday	09:00	12:00	13:00	16:30	06:00
Sunday	09:00	12:00	13:00	16:30	06:00
					06:00

**Payroll:**

Weekly    Last timesheet for this assignment:        Hold timesheet back

**Imported holiday balance (hours):** 12h 0m

**Outstanding holiday balance (hours):** 15h 40m

(This value includes any reported holiday absence)

**Holiday to be paid with this timesheet (hours):** 7h 0m

Subtract this to be paid for an absence using to be transferred to this

**Time off sick:** 0h 0m

Timesheet entries with a green background indicate times that were taken as absence. Amend if as

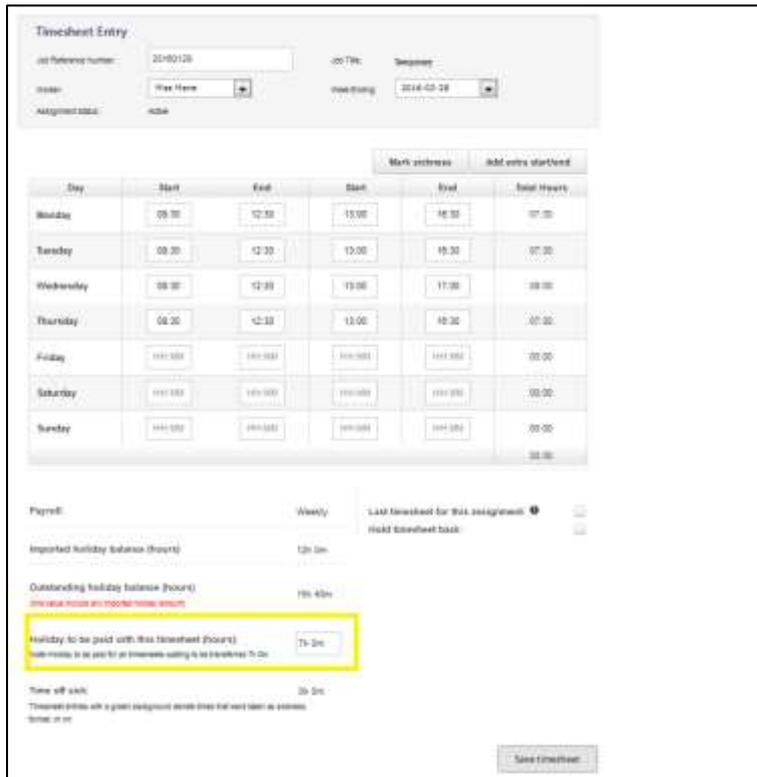
Save Timesheet

The first field show the accrued holiday balance imported from the Access database for that worker. This includes unclaimed holiday accrued in all years across all of the workers assignments.

The second field show the current holiday situation and is comprised of any leave earned in the assignment plus the brought forward value from Access.

## How do I claim holiday for a worker?

You can enter the holiday to be claimed on the timesheet entry screen:



Timesheet Entry

Job Reference Number: 20160128 Job Title: Designer

Week Ending: 2014-02-28

Assigned to: adia

Day	Start	End	Start	End	Total Hours
Monday	08:30	12:30	13:00	16:30	07:30
Tuesday	08:30	12:30	13:00	16:30	07:30
Wednesday	08:30	12:30	13:00	17:00	08:00
Thursday	08:30	12:30	13:00	16:30	07:30
Friday	08:30	12:30	13:00	16:30	07:30
Saturday	08:30	12:30	13:00	16:30	07:30
Sunday	08:30	12:30	13:00	16:30	07:30

Payroll: Weekly

Imported holiday balance (hours): 12h 0m

Outstanding holiday balance (hours): 15h 45m

**Holiday to be paid with this timesheet (hours): 7h 0m**

Time off sick: 0h 0m

Save timesheet

Enter the total holiday to be claimed into the 'Holiday to be paid with this timesheet (hours) field.

The holiday will then be added to the amount to be paid out for the week and will show on the check timesheet screen:

<input type="checkbox"/>	Arkadiusz	Weekly	28-Feb-2016	0h 0m	35.50	£ 402.22	£ 558.29
<input type="checkbox"/>	Cristina	Weekly	28-Feb-2016	0h 0m	16.00	£ 209.92	£ 288.56
<input type="checkbox"/>	Marie	Weekly	28-Feb-2016	7h 0m	30.50	£ 424.88	£ 477.94
<input type="checkbox"/>	Catherine	Weekly	28-Feb-2016	0h 0m	35.00	£ 501.55	£ 679.70
<input type="checkbox"/>	Jill	Weekly	28-Feb-2016	0h 0m	20.00	£ 196.40	£ 275.60
<input type="checkbox"/>	Anthea	Weekly	28-Feb-2016	0h 0m	36.75	£ 482.16	£ 658.19

## How has the workers cumulative holiday balance been brought across from Access?

All of the leave outstanding in Access for a worker has been added together across all years and all of the workers assignments.

This single figure has been migrated into the new application and can be seen on the timesheet:

## How is holiday paid out at the end of an assignment?

On the timesheet for the worker, when you tick the 'Last timesheet for this assignment box:

Day	Start	End	Start	End	Total Hours
Monday	13:00	17:15	HH:MM	HH:MM	04:15
Tuesday	HH:MM	HH:MM	HH:MM	HH:MM	00:00
Wednesday	13:00	17:15	HH:MM	HH:MM	04:15
Thursday	HH:MM	HH:MM	HH:MM	HH:MM	00:00
Friday	HH:MM	HH:MM	HH:MM	HH:MM	00:00
Saturday	HH:MM	HH:MM	HH:MM	HH:MM	00:00
Sunday	HH:MM	HH:MM	HH:MM	HH:MM	00:00
					08:30

**i** Timesheet saved successfully

Payroll: \_\_\_\_\_ Weekly **Last timesheet for this assignment:**   
Hold timesheet back

The remaining leave for the assignment is paid out and this can be verified by looking at the entry for the timesheet on the check timesheet screen. The hours and minutes claimed should show in the 'Holiday claimed' column:

<input type="checkbox"/>	_____	Weekly	28-Feb-2016	0h 0m	36.50	£ 478.88	£ 653.72
<input type="checkbox"/>	_____	Assistants	28-Feb-2016	2h 24m	6.00	£ 95.17	£ 94.02
<input type="checkbox"/>	_____	Weekly	28-Feb-2016	0h 0m	33.00	£ 324.06	£ 454.74

## How do I record sickness for a worker?

Sickness is recorded on the timesheet for the worker for that week. Click on the 'Mark sickness' button:

**Timesheet Entry**

Job Reference Number:  Job Title: **Temporary**

Worker:  Week Ending:

Assignment status: **Active**

Day	Start	End	Start	End	Total Hours
Monday	<input type="text" value="08:30"/>	<input type="text" value="12:30"/>	<input type="text" value="13:00"/>	<input type="text" value="16:30"/>	07:30
Tuesday	<input type="text" value="08:30"/>	<input type="text" value="12:30"/>	<input type="text" value="13:00"/>	<input type="text" value="16:30"/>	07:30

A tick box will be added next to each time period for the week:

Day	Start	End	Start	End	Total Hours
Monday	<input type="checkbox"/> <input type="text" value="08:30"/>	<input type="text" value="12:30"/>	<input type="checkbox"/> <input type="text" value="13:00"/>	<input type="text" value="16:30"/>	07:30
Tuesday	<input type="checkbox"/> <input type="text" value="08:30"/>	<input type="text" value="12:30"/>	<input type="checkbox"/> <input type="text" value="13:00"/>	<input type="text" value="16:30"/>	07:30

## Where can I find the job reference for a worker?

Using the 'Worker' tab option 'Find/Create worker' click on the 'Search for worker' button:

**Find/Create Workers**

Please select a worker to edit using the features below. Temporary workers that you have accessed recently are listed on the screen.

**Search for worker**

Forename:

Surname:

Date of Birth:

Personal Reference:

National Insurance Number:

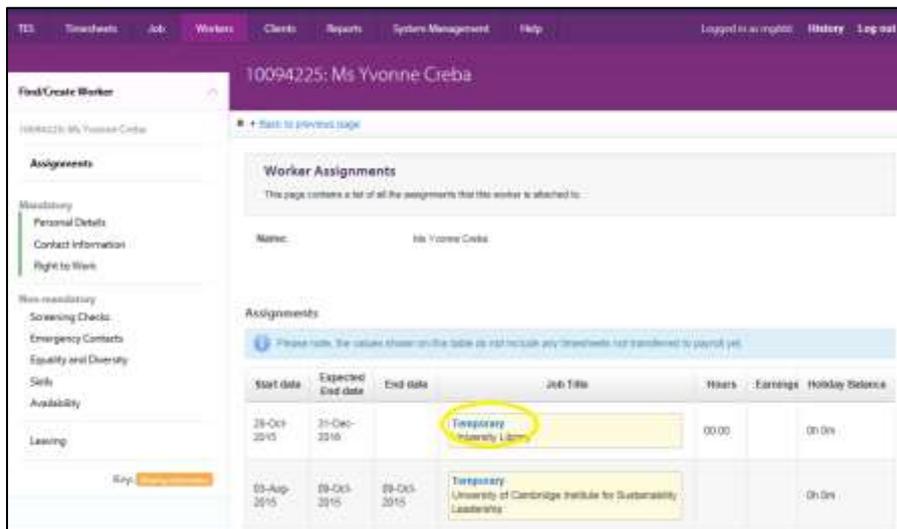
Include leavers:

Select the worker and click on the edit button to access their details:

**Search Results**

	Person Reference	Worker Name	NI Number	Date of Birth	Leaving Info	
	10094225	Ms Yvonne Creba	PX031714C	27-Jan-1966		Contacted

The workers assignments will be listed and you can click on the link in the Job Title field in order to see the details for the selected assignment:



**Worker Assignments**

This page contains a list of all the assignments that the worker is attached to:

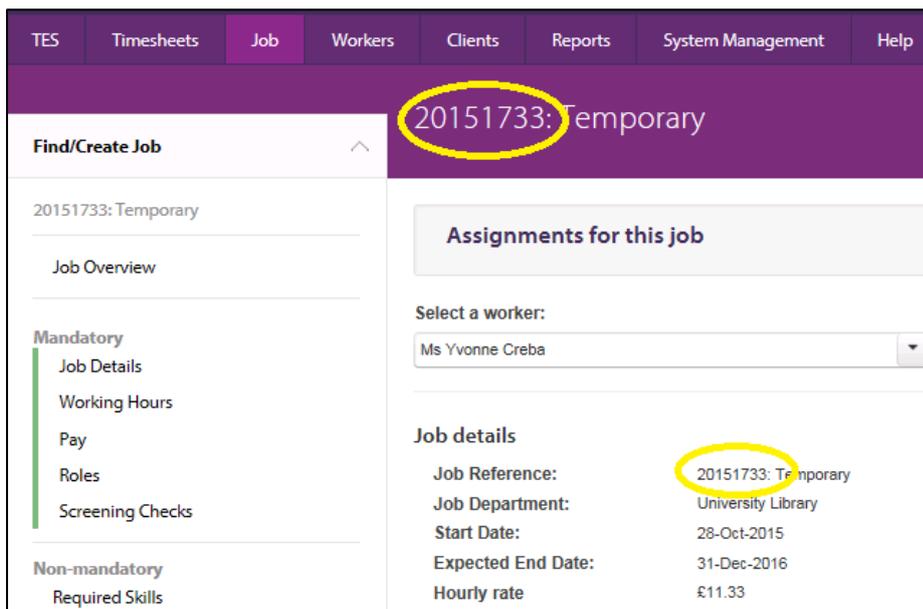
Name: Ms Yvonne Creba

Assignments

Please note, the values shown on this table do not include any assignments not transferred to payroll yet.

Start date	Expected End date	End date	Job Title	Hours	Earnings	Holiday Balance
28-Oct-2015	31-Dec-2016		Temporary University Lib	00:00	00.00	
03-Aug-2015	09-Oct-2015	09-Oct-2015	Temporary University of Cambridge Institute for Sustainability Leadership			0h 0m

Next click on the View assignments option and the Job reference can be seen in the header and body of the screen:



**20151733: Temporary**

**Find/Create Job**

20151733: Temporary

Job Overview

**Mandatory**

- Job Details
- Working Hours
- Pay
- Roles
- Screening Checks

**Non-mandatory**

- Required Skills

**Assignments for this job**

Select a worker:  
Ms Yvonne Creba

**Job details**

Job Reference: 20151733: Temporary

Job Department: University Library

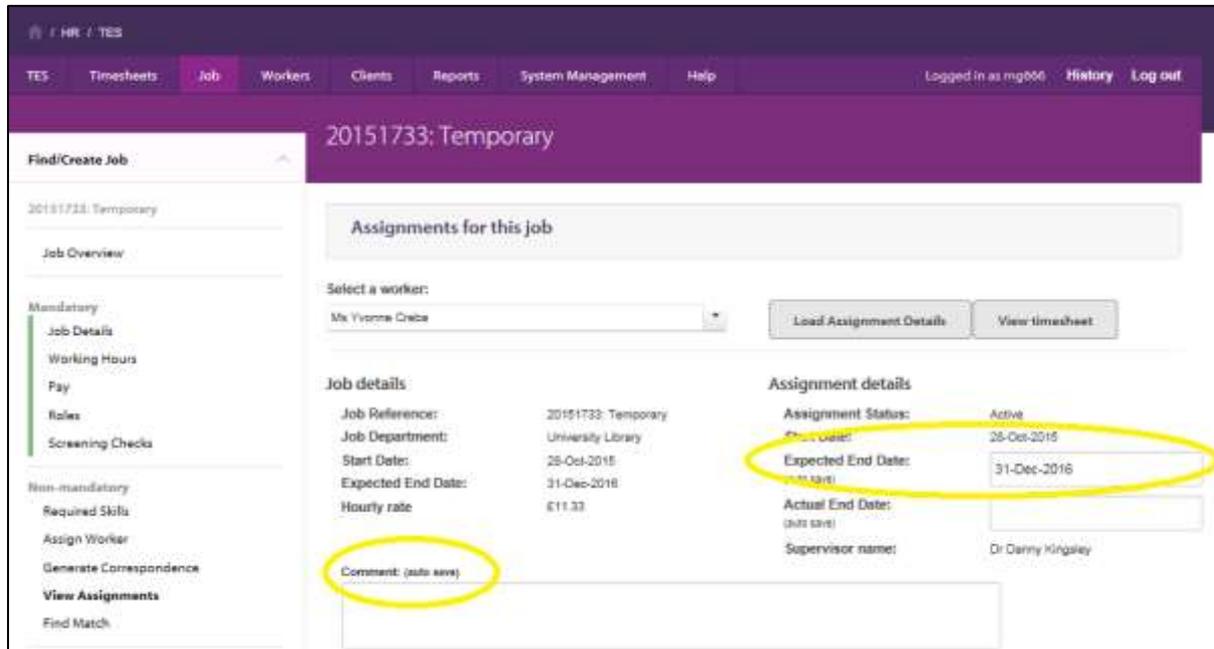
Start Date: 28-Oct-2015

Expected End Date: 31-Dec-2016

Hourly rate: £11.33

### How do I extend an assignment?

Under the worker tab, click on 'View Assignments' and change the expected end date ensuring that you add a comment, your initials, the date and the person who is requesting the extension.



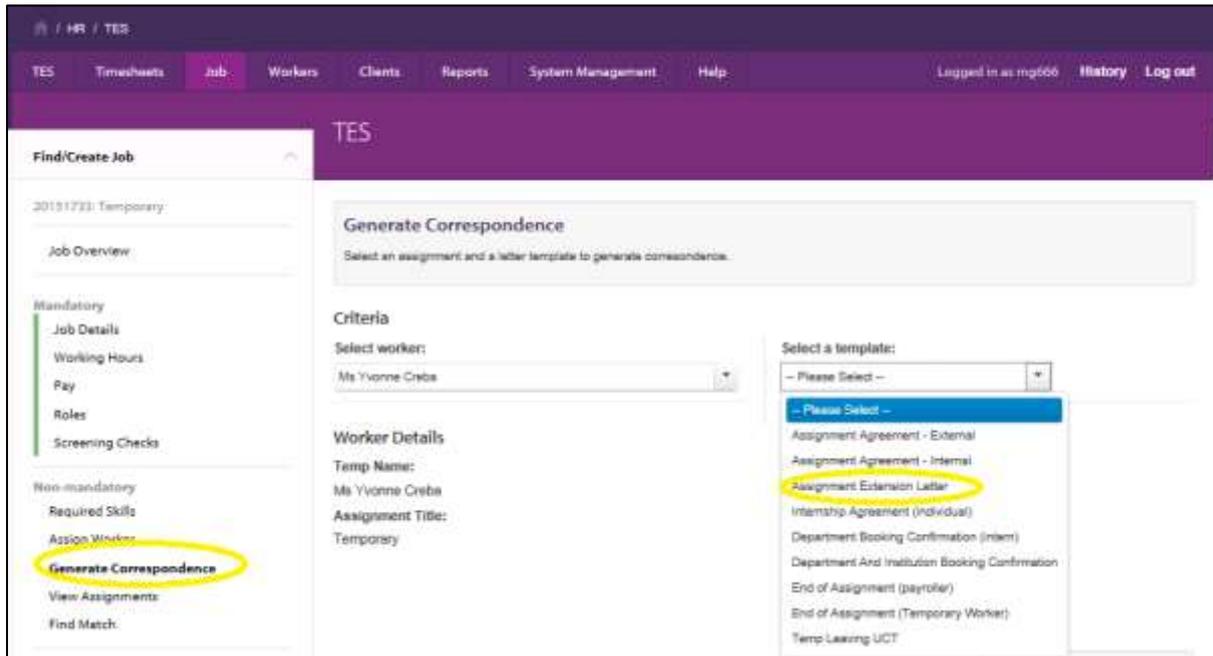
The screenshot shows the TES application interface for job 20151733: Temporary. The page is divided into several sections:

- Job details:** Job Reference: 20151733: Temporary, Job Department: University Library, Start Date: 28-Oct-2015, Expected End Date: 31-Dec-2016, Hourly rate: £11.33. A yellow circle highlights the 'Comment: (auto save)' field.
- Assignment details:** Assignment Status: Active, Start Date: 28-Oct-2015, Expected End Date: 31-Dec-2016, Actual End Date: (not saved), Supervisor name: Dr Danny Kingsley. A yellow circle highlights the 'Expected End Date' field.
- Navigation:** The left-hand menu includes 'View Assignments', which is highlighted with a yellow circle.



Please note: that when you are updating the expected end date for an existing temp you can just key the new date into the field and the change will be saved. You do not need to click on a save button.

You will then need to go to the 'generate correspondence' option on the Job tab in order to select and generate an Assignment Extension letter.

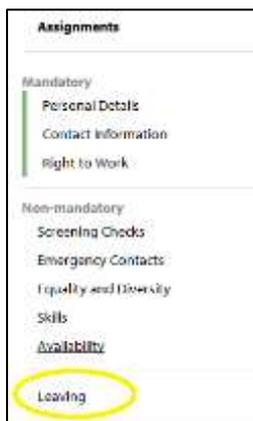


## How do I make a worker a leaver?

From the worker tab:



Select the 'Leaving' option:



The following screen will then be displayed:

### Leaving Details

Leaving Details
Leaver History

**Leaving Details**

Leaving date: \*

**Employment on a University Contract Details**

Is the worker going to be employed on a University contract on leaving UCT?

-- Please Select --
▼

Details about University contract of employment (if known):

1000 characters remaining.

Reasons for leaving: \*

--Please Select--
▼

Is P45 Required

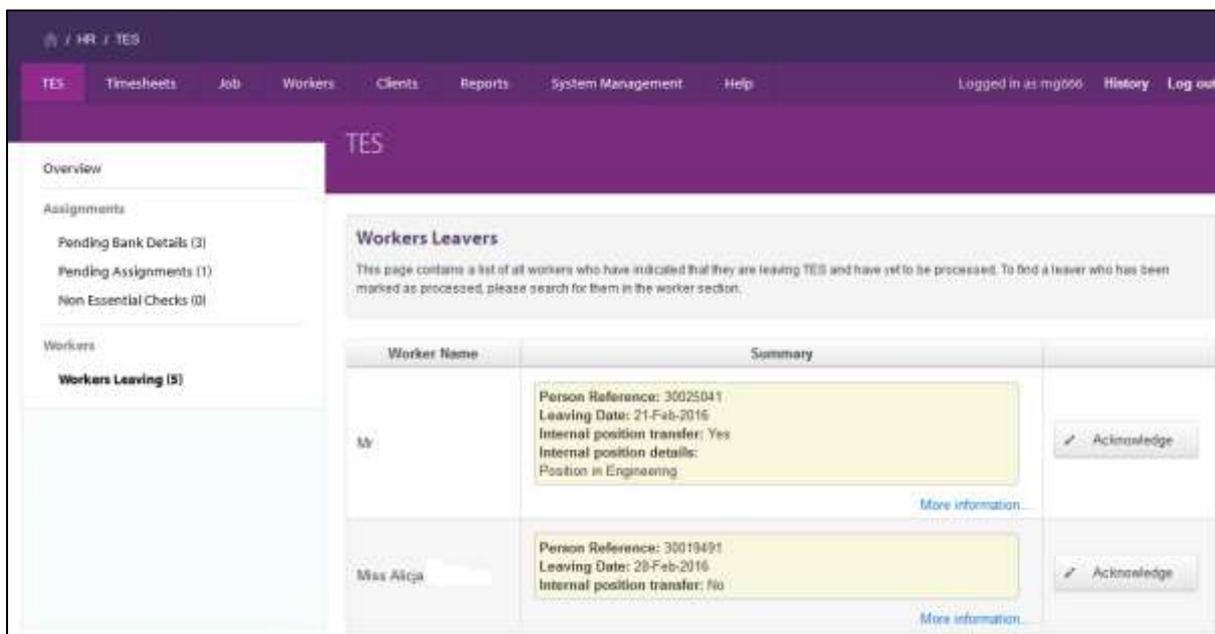
No
▼

Save End Of Assignments

Reinstate Worker

You can then enter the leaving details then click on the save button.

The worker will then be shown on the list of leavers to be acknowledges on the 'Workers Leaving' menu on the main TES home tab:



The screenshot shows the 'Workers Leavers' section of the TES application. It features a table with two columns: 'Worker Name' and 'Summary'. The table lists two workers with their respective details and 'Acknowledge' buttons.

Worker Name	Summary	
M	Person Reference: 30025041 Leaving Date: 21-Feb-2016 Internal position transfer: Yes Internal position details: Position in Engineering	<input type="button" value="Acknowledge"/>
Max Alca	Person Reference: 30019491 Leaving Date: 28-Feb-2016 Internal position transfer: No	<input type="button" value="Acknowledge"/>

Once the acknowledge button has been clicked, the worker will be marked as a leaver, the availability will be updated and the worker will no longer appear during matching or searching unless the box to include leavers has been clicked.

## How do I arrange for a P45 to be issued?

From the worker tab:

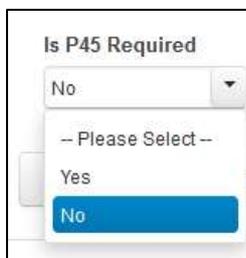


Select the 'Leaving' option:



The following screen will then be displayed:

You can then choose to request that a P45 be issued to the worker by selecting yes from the drop down list:



Please note: that you can also record details of a transfer on this screen.

## What leaving reasons will be available when a worker leaves the service?

The leaving reasons will tie in with the reasons currently used when entering leaver information in CHRIS. There will therefore only be two options:

- Death; and
- TES Leaver.