

Senior Academic Promotions

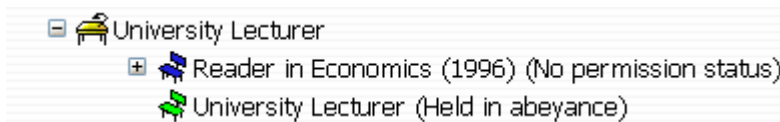


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1 Introduction

Within the Trent organisation structure of the University there is a post for each position.

However, for certain academic promotions this will be displayed as one post with two positions where the underlying position remains vacant. For example where a Lecturer is promoted to a Reader, a new position of Reader is created under the post of University Lecturer, and the position of Lecturer remains, as this would be the post and position into which a replacement would be recruited.



1.1 Senior Academic Promotions


1. Set the effective date
2. Go to Organisation Explorer and search for the surname of the person being promoted. (Searching this way allows you to see if the individual is holding any other offices that are linked to their current appointment that would need to be referred to in the new contract ie Curatorship)
3. Select the University Lecturer Post  University Lecturer
4. Select mini explorer
(You can then see the Post/Position/Person hierarchy and manoeuvre through the procedure without opening additional screens)
5. Select the individual and check for any absence already granted. (Absence, personal absence list) As any existing absence would need to be referred to in the new contract.
6. Select People in the Navigation Trail to return to the Mini Explorer.
7. Select the University Lecturer Post (not the position)
8. Create the new position (e.g. Reader) under existing Lecturer Post. Select  [Create position](#) . Type in the new position details.


Create linked item:	
Name	<input type="text" value="Reader"/>
Quantity	<input type="text" value="1"/>

9. Click on the  button .


10. Select the newly created position from the Mini Explorer.
11. Amend, where necessary the "Reports to" details by clicking on the magnifying glass and selecting the appropriate person. The Head of the relevant institution should be the Reporting Manager.


Reporting unit Faculty of Economics

Reports to 

12. The permission to fill status will be automatically shown with permission to fill granted and the effective date. (If not immediately upon entering the position details screen then when the  button is clicked). Make a note of the position reference number.

Position status	
Position status	<input type="text" value="Permission to Fill granted"/>
Effective from	<input type="text" value=""/>
Third party return details	
Teacher	<input type="checkbox"/>



13. Set the payscale values for the position. Select  Payscale values

II Payscale values : Reader in Economics (Permission to Fill granted)

Grade

Payment table

FT Salary

Protected

Override minimum

Override maximum

Grade payment table National Spine


Grade minimum 47,685.00

Grade maximum 55,280.00








Next increment date

Additional increment points

Protected rate of pay

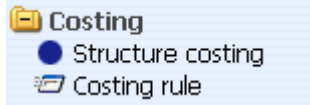
14. Choose the grade, point on spine, and for a University Senior Lecturer the next increment date.
 University Senior Lecturers are appointed at Grade 10, point 59, and are entitled to automatic increments. Readers are appointed on the second point of grade 11, at point 63 and do not get automatic increments. The override minimum and override maximum needs to be set at point 63 and next increment date field should be left blank.
 Professors are appointed on the first point of grade 12, point 68 and also do not get automatic increments, in this case the override maximum field needs to be set at point 68 and again leave the increment date field blank
15. Click on the  button.

16. Change the category. Select Hours and Basis

Hours and basis : Reader in Economics (1996) (No permission status)	
Contractual Hours	<input type="text" value="37.00"/> 
FTE hours	<input type="text" value="37.00"/> 
Post budgeted hours	
Annual weeks worked	<input type="text" value="52.25"/> 
Category	<input type="text" value="Reader"/> 
Basis	<input type="text" value="Established - One Tenure"/> 
Type	<input type="text" value="Academic"/> 
Change reason	<input type="text"/>
FTE details	
Override FTE calculation	<input type="text" value="No override"/>
FTE value 1.00	

17. Change the category to whatever the new grade is - Senior Lecturer, Reader or Professor, and change the Basis to Established – One Tenure.
18. Leave the change reason blank.
19. Click on the button.

20. Change the costing details. Select Costing, Structure Costing



21. Select current costing details and choose Structure Costing. Amend the transaction code as appropriate.

Note that transaction codes are different for the different types of academic staff:



Professor (Non clinical) ABAP
 Reader (Non-clinical) ABAR
 University Senior Lecturer (Non – clinical) ABAL
 University Lecturer (Non – clinical) ABAI

For Clinical staff, points 68 – 78 = G, 80 – 97 = F


22. Click on the  button.
23. Choose HESA details for the position



Current FTE	
FTE override percentage	<input type="text"/>
Grade override	<input type="text"/>
Senior management post	<input type="checkbox"/> II
Atypical	<input type="checkbox"/> II
Exclude from HESA return	<input type="checkbox"/> II
Campus identifier	Entire Institution II
Principal source of basic salary	Wholly general institution financed
Secondary source of basic salary	No secondary source
Percentage of salary charged against general income	100.0 II
Terms of employment	<input type="text"/>
Mode of employment	<input type="text"/>
NHS contracts	<input type="text"/> II
NHS contract grade	<input type="text"/> II
Healthcare professional speciality	<input type="text"/> II
Academic employment function	Teaching and research II
HEI joint contracts	<input type="text"/>
Code	Cost centre
Activity 1 Academic Professional II	<input type="text"/>

Campus Identifier should remain the same
Principal Source of salary – the value should be inherited
Secondary Source of salary – the value should be inherited
Percentage of salary charged to general income – the value should be inherited.
Academic Employment Function should be the same: Teaching and Research
Activity Code 1 should be the same: Academic Professional

24. Click on the  button.
25. Select Position from the Navigation trail to return to the mini explorer and select the individual who is being promoted.
26. Select the Employment folder and select  Person transfer option
The person transfer form will appear
27. Click the drop down arrow and select a transfer reason of Transfer – Promotion
28. Use the search facility to find the correct destination position using position reference number.

Transfer from	
Job title	<input type="text" value="University Lecturer"/>
Occupancy start	01/07/1985
Transfer reason	<input type="text" value="Transfer - Promotion"/>
Reporting position	Chairman of Faculty Board
Reporting unit	Faculty of Economics

Transfer to	
Job title	<input type="text" value="Reader in Economics"/> 
Reporting position	University Lecturer
Reporting unit	Faculty of Economics

29. Click on the Preview button to view details of the transfer. This will display a list of all the inheritance items relating to the new position and the current status relating to each.

Transferring from University Lecturer
Transferring to Reader in Economics

+ Academic Employment Function Inherit Retain original Retain overrides

+ Activity Code 1 Inherit Retain original Retain overrides


+ Address Inherit Retain original Retain overrides

+ Assessor Inherit Retain original Retain overrides

+ Budget Hours Inherit Retain original Retain overrides

+ Campus Identifier Inherit Retain original Retain overrides

30. Click on the **+** beside an item and Trent opens a drop down panel detailing values in the old and new position. Use this to double check the details previously entered – for example payment details. Changes are shown in blue on the right hand side. The main areas for checking are: Category, basis & type, Costing Levels, Elements, Payment Details, Terms and Conditions.
31. You may choose to Inherit the value attached to the position, retain original value of the person's former position or retain overrides attached to the person's former position by selecting the related radio button. Confirm the choice of inheritance required.

Terms and Conditions		<input checked="" type="radio"/> Inherit <input type="radio"/> Retain original <input type="radio"/> Retain overrides	
Type	Current value	Override	New value
OSP - Sickness	Occupational Sickness Scheme	<input type="checkbox"/>	Occupational Sickness Scheme
OSP - Sickness	 Occ Sickness Scheme (Pre Jan 04)	<input checked="" type="checkbox"/>	Occ Sickness Scheme (Pre Jan 04)
Faculty Membership	Faculty of Economics	<input type="checkbox"/>	Faculty of Economics
Other	Sabbatical Leave	<input type="checkbox"/>	Sabbatical Leave
Competent Authority	General Board	<input type="checkbox"/>	General Board
OMP	Occupational Maternity Scheme	<input type="checkbox"/>	Occupational Maternity Scheme
Final Salary Scheme	USS	<input type="checkbox"/>	USS

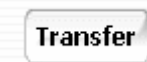
32. Click on the beside Elements to expand the details

Elements		<input checked="" type="radio"/> Inherit	<input type="radio"/> Retain original	<input type="radio"/> Retain overrides
Type		Current value	Override	New value
Chairman Payment (NP)		1200	<input type="checkbox"/>	
Basic Pay		UC_SALARY	<input type="checkbox"/>	UC_SALARY

33. Any allowance payments will be displayed here – in this example the Chairman Payment. If this allowance is still to be paid in the new position, select the override check box.

Elements		<input checked="" type="radio"/> Inherit	<input type="radio"/> Retain original	<input type="radio"/> Retain overrides
Type		Current value	Override	New value
Chairman Payment (NP)		1200	<input checked="" type="checkbox"/>	1200
Basic Pay		UC_SALARY	<input type="checkbox"/>	UC_SALARY

34. When you have reviewed the changes and amended as necessary click on the



button at the bottom of the screen to complete the transfer.

Note, the transfer is not instant, there is a small delay which may require the screen to be refreshed in order to view the change.

1.1.1 Changing Permission Status

An academic promotion will be displayed similar to the example shown below:

University Lecturer
<ul style="list-style-type: none"> Reader in Economics (1996) (No permission status) University Lecturer (Held in abeyance)

The underlying University Lecturer position remains, but with a position status of Held in Abeyance.

1. Select the University Lecturer position and choose position details
Change the position status to Held in Abeyance

Position status

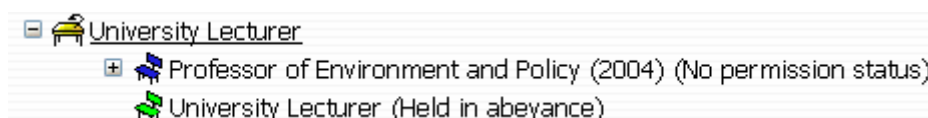
Position status

Effective from


2. Set the effective date to the start date of the promotion and Save the changes.

1.2 Entering Position End date


Where a Senior University Lecturer is further promoted to a Reader, or a Reader is further promoted to a Professor the previous position will need to be ended. For example below the current occupant has been promoted from a Reader to a Professor, but when the occupant is transferred into the Professor position the Reader position is ended, leaving the University Lecturer position in abeyance.



1. Select the Senior University Lecturer Position or Reader position which requires ending.
2. Choose position details
3. Click in the end date change check box
4. Enter the day before the new promotion as the end date.

 Any units, posts and vacancies will be affected by the end date (ended/restored).

Position details: Reader in Economics

Job title	Reader in Economics
Start date	06/03/2007
End date change?	<input checked="" type="checkbox"/>
End date	<input type="text"/> 

5. Click on the  button

1.3 Leavers

Where a person who has previously received a senior academic promotion leaves the University the position that they occupied will need to be ended and the status of the underlying University Lecturer position will need to be changed from Held in Abeyance to No permission status. This is because there is a remote possibility that the Resource Management Section may want to freeze or delay filling the underlying post again. Once payroll have processed the employee as a leaver, the change to permission status can be made with the correct leaving date. See the instructions above for entering a position end date and changing the position status.