Contract Monitoring

Fixed Term Contract Monitoring Report
Contents

Page 3  The Fixed Term Contract Monitoring Process
Page 4  - Overview
- Report Parameters
- Visibility
Page 5  Accessing the Report
Page 6  Overview of the Fixed Term Contract Monitoring Report
Page 7 - 8  How to Complete the Report
Page 9  Notification Letter Types
Page 9  Locking Staff Members Records
Fixed Term Contract Monitoring Process

Replaces current paper based fixed term contract monitoring report (Form A)

Departmental Owner in department

Departmental Owner receives email alerting them that the report needs completing

Department considers options for the staff

Funding uncertain/not confirmed

Funding confirmed

No further funding/work

Departmental Owner completes the report in MyTeam

Recruiter/Contract Administrator completes a contract change request to extend their contract.

If the contract is ending or funding is uncertain the Manager is to hold a consultation meeting and advise them of their redeployment and redundancy options.

HR access the information provided & produce the notice letters

Notice letter sent to individual

HR update uBASE regarding the type of letter sent

A hard copy of the Notice letter will be sent to the individual

This automatically updates the FTCM report so the Departmental Owner has visibility of the action taken.
Overview

The Fixed Term Contract Monitoring (FTCM) Report replaces the University’s previous paper based process (Form A). The purpose of this process is to supply Human Resources with information regarding fixed term contracts of employment that are approaching their end date. The information provided is used to ensure staff members receive the correct notice period and information should their contract be ending. It also acts as a prompt for departments to complete a contract change request if contracts are to be extended.

The on-line report provides a more efficient method of collecting and processing the monthly fixed term contract monitoring information but the monitoring process itself remains unchanged. The report will be accessed within myTeam and will be completed by key staff as defined by each department, who will be referred to as Departmental Owners for this process.

Report Parameters

The report displays staff members whose fixed term contract end date is within 5 months of the start of the current month.

For Example: If you are accessing the report in November staff whose is due to end within 5 months of the 1st of November will be visible.

Removal from the report

- If Human Resources process a contract extension for longer than 5 months they will disappear from the report.
- If Human Resources process an extension for less than 5 months they will appear on the report again. However it will be a new record with their new contract end date.
- If Human Resources process the staff member as a leaver they will be removed from the report.

Visibility

The FTCM report provides two levels of visibility which are dependent on the myTeam role assigned.

myTeam HR: Provides the Departmental Owner(s) of the report with access to all staff on fixed term contracts for their specified department or section. Staff with this myTeam role will receive an email alert on the 1st of the month notifying them if there are staff members within their area who require processing.

myTeam: Provides managers with visibility of the staff on fixed term contracts that they directly manage. They will not receive an email alert at the start of the month.
Please note it is each department’s choice as to how they prefer to manage the collection of the required information via this report. Some departments may choose to have one of two key people, who have the myTeam HR role, enter the information into the report for all the relevant members of staff within their department and other departments may prefer to ask line managers to update the report directly for the members of staff that report to them.

The email alert to highlight that there are staff listed on their department’s FTCM report will only be sent to staff with the myTeam HR role and Human Resources will also only send communications regarding this process to staff with the myTeam HR role. Each department is then able to choose whether they ask any line managers with the myTeam role to access and update the report for the staff they manage directly.

**Accessing the Report**

Users will access the report via Muse through either MyTeam or MyTeam (HR) depending on the role(s) assigned to them. You should then click on the heading FTC Monitoring circled and the report will appear.

If you have both the myTeam (HR) and the myTeam roles, all the relevant members of staff within your department or section will be listed on the report if you access it via the myTeam (HR) tab and only those staff that directly report to you and are approaching the end of their fixed term contracts of employment will be shown if you open the report using your myTeam tab.
Fixed Term Contract Monitoring Report

This screen gives an overview of the report you have access to. From this page you can view and update staff records as well as tracking what type of notice letter they may have received.

Save: Click here to save any information you have entered. You MUST click save before you exit the report.

Position: Displays the staff member’s uBASE position number.
Current Funding: Provides details of where their current contract is funded from.
Service Date: Displays their continuity of service start date indicating their first date of employment with the University.
Contract End: Shows the end date of their current contract with the University.
Renew Funding: Displays whether additional funding has been secured and for how long.
Reason No ReContract: If the above response was ‘No’ this field provides the reason.
Consultation Staff: Displays whether a meeting with the staff member has been held or is required.
FTCMR Updated: Displays the date information was last saved against the record.

Fixed Term Contract Monitoring

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Position</th>
<th>Current Funding</th>
<th>Service Date</th>
<th>Contract End</th>
<th>Notification Type</th>
<th>Date Notified</th>
<th>Renew Funding</th>
<th>Reason No ReContract</th>
<th>Consultation Staff</th>
<th>FTCMR Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Miss Eva Tointon</td>
<td>50003111</td>
<td>300017 50% AО</td>
<td>01.01.2010</td>
<td>30.08.2010</td>
<td>Seeking funds</td>
<td>28.10.2010</td>
<td>No</td>
<td>Awaiting confirmation of</td>
<td>Yes - redeployment</td>
<td>14.10.2010</td>
</tr>
</tbody>
</table>

Name: Miss Eva Tointon / Person No. 10000058 / Line Man. Mo Kora Tointon / email: JENNY.TEST@SHEFFIELD.AC.UK
Notes: Waiting on confirmation of BBSRC grant - Confirmation due 26/1/010

Further Information Box:

Person No. Gives you visibility of their personnel number. This may be required to process a contract extension request.

Line Manager & Line Manager’s Email address. This information is provided to assist you if you need to contact their line manager regarding the status of their contract.

Notes Field: Allows you to provide Human Resources with any relevant details. This is automatically saved into the staff member’s uBASE record.

Human Resources are able to add notes to the uBASE record which in turn updates the Notes field within the report giving you visibility.

Filter Row: Enables you to search for a specific staff member’s record.

1. Click in the column you wish to search on e.g. Name
2. Type in the Name using wildcards either side e.g. *Tom Smith*
3. Click on the Filter Symbol

Any records with a matching name will appear

4. To return to all staff records delete the name in the search row and press the filter symbol.
### Completing the Report

The fields below will be completed by the department and should relate to the contract expiry date specified on the report.

If you specify that a member of staff is not being extended or that they have chosen not to be extended, Human Resources will end their record on uBASE from the end date of their current contract.

If the situation changes and the member of staff is to remain at the University you must ensure that you notify Human Resources and submit a contract change request so that the staff member is not excluded from Payroll.

#### Renew Funding?

Confirm whether additional funding has been secured and if so for how long.

- **No**: You must now complete the next field to explain why funding is not secured and, if relevant, add a note for Human Resources.
- **Yes < 4 mths**: Your department must now complete a Contract Change Request within e-Recruitment to extend their fixed term contract.
- **Yes > 4 mths**: Your department must now complete a Contract Change Request within e-Recruitment to extend their fixed term contract.

#### Reason for Non-Renewal?

This must only be completed if you answered 'No' to the above question.

- **End of project**: You are advising that their contract will end due to the work finishing.
- **End of funding**: You are advising that their contract will end due to the **funding** ending.
- **Staff resignation**: The staff member does not want to extend their contract. They are therefore resigning and are not eligible for redeployment or redundancy.
- **Seeking extra funding**: You are advising that additional funding is being sought.
- **Awaiting confirmation of funding**: You are advising that additional funding has been applied for and you are awaiting confirmation.
### Individual Consultation with Staff Member

<table>
<thead>
<tr>
<th>Renew Fund…</th>
<th>Reason No ReContract</th>
<th>Consultation Staff</th>
<th>FTCM Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>Seeking extra funding</td>
<td>-- Select --</td>
<td></td>
</tr>
</tbody>
</table>

- **Yes redeployment/redundancy discussed**: The appropriate person within your department has met with the member of staff individually and explained their redeployment and redundancy options.

- **No**: The meeting to discuss the person’s redeployment and redundancy options has not yet been held.

- **Not applicable**: A meeting is not applicable as the member of staff has resigned or their contract of employment is being extended.

#### Notes Field

You can enter any additional information you think Human Resources should be aware of. You should then click **Save** to ensure the information is saved and that their uBASE record is updated.

Clicking save populates the FTCMR Updated column.
Notification Letters

Below are the types of notification letter sent by Human Resources to the individual regarding the end of their current fixed term contract of employment.

- **Seeking information**: No information was provided on by the department on the FTCM report.

- **Seeking funds**: The department advised on the FTCM report that funding was being sought/being confirmed.

- **Notice – end of project**: The department advised on the FTCM report that the ‘work’ was ending. The staff member will be processed as a leaver.

- **Notice – end of funding**: The department advised on the FTCM report that no further funding is available. The staff member will be processed as a leaver.

- **No extension (resignation)**: The department advised on the FTCM report that the staff member did not want to extend their contract. The staff member will be processed as a leaver.

### Notification Type | Date Notified | Renew Funds | Reason No ReContract | Consultation Staff | FTCM Updated
--- | --- | --- | --- | --- | ---
Seeking funds | 28.10.2010 | No | End of project | Yes - redeployment/red | 14.10.2010

### Locking Staff Member’s Records

If the fields you are normally able to update for the member of staff are blue then the record is currently being edited by another user. You will be unable to update the report at this time and should try again later.

When you are in the report other users, including Human Resources, will be unable to update the staff records for all the people listed. Therefore, please may we ask that you ensure that you exit the report when you are not actively updating it.