



How to...amend a fixed term contract or make a fixed term employee permanent

Purpose:

This guide will show you how to amend a fixed term contract for an employee or, make them permanent in the same position within **People Manager** in Your HR.

Notes:

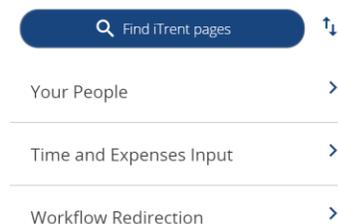
The Expected occupancy end date (i.e. fixed term contract end date) does not automatically end the contract and make the employee a leaver. This date is only an 'expected' end date and will be used to generate an email reminder to the reporting manager 30 days before the expected occupancy end date so the appropriate action can be taken i.e. to extend the contract for a further period or to make the employee a leaver.

Logging in to Your HR:

To log into Your HR, please refer to the **How to...Log in to Your HR Guide (ESS 1)**. After login you will be presented with the People Manager Homepage

Amending fixed term contracts

- Click on **Your People** in the menu



- Click on the required employee from your list of direct reports which will be presented on the dark pane on the left-hand side of the screen:

- Mr Joe Test
- Mrs Poppy Tests
- Miss Samantha Tests

- Click **Process Chains** and then **Amend Fixed Term Contracts**

A navigation menu with several categories, each in a colored box with a right-pointing chevron:

- Personal information (blue)
- Employment Details (orange)
- Pre Employment Checks (green)
- Time and Expenses (purple)
- Leave and Absence (pink)
- Appraisal Records (light purple)
- Learning, Qualifications & Memberships (yellow)
- Disciplinary/Capability & Grievance (teal)
- Process Chains (light green, circled in red)
- Make your Employee a Leaver (grey)

 Below the menu is a hamburger icon and a list of actions:

- Change to Hours (yellow box)
- Amend Fixed Term Contracts (yellow box, circled in red)
- New Starter - Agency Staff (yellow box)

- If the employee has more than one position, click on the relevant position from the left-hand side:

A dropdown menu titled 'Positions' with an upward-pointing chevron on the left and a three-dot menu icon on the right. The dropdown is open, showing a blue bar with the text 'Test Team Lead'.

Selecting An Effective Date

- An effective date box will be displayed. The effective date can be changed to retrieve data from a specified point in time, including future dated changes. If making a change to the ensure you set this to the effective date of the change

Effective date



Please enter the date you wish to view or edit this information from.

08/02/2023

OK CANCEL

- Amend the date to the date of the change to their contract and click on **OK**. The effective date will always be shown in the top left of the screen as well as against the screen name:

Hours and basis (as of 08/02/2023) Test Team Lead



Step 1 of the Amend Fixed Term Contracts process chain is displayed

The Hours and Basis screen is displayed:

Hours and basis (as of 08/02/2023) Test Team Lead ↻ 🖨 📎

Contractual Hours	<input type="text" value="37.00"/>	⬇️
FTE hours	<input type="text" value="37.00"/>	⬇️
Post budgeted hours	<input type="text"/>	⬇️
Annual weeks worked	<input type="text" value="52.142"/>	🚫
		⬇️
FTE value (rounded to 5 DP)	<input type="text" value="0.00000"/>	
Employment is term-time only	<input type="checkbox"/>	⬇️
Category	<input type="text" value="Employee"/>	⬇️
Basis	<input type="text" value="Full time"/>	⬇️
Type	<input type="text" value="Fixed Term Agile Working"/>	🚫
Change reason	<input type="text"/>	

Additional fields

End date for Temporary Change of Hours	<input type="text" value="26/11/2024"/>	📅
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- Red stars next to the field title indicate mandatory fields that must be completed.
- Fields ending with a black/white cloud  are inherited fields which means they are information that has been set at a higher point in the structure i.e. at the Unit or Post level
- Fields ending with a white cloud with a line through it  are inherited fields which have been broken which means they have either been overwritten e.g. default working hours for 37 hours have been changed to 25 hours because the employee is working part and not full time

- If any of the information needs amending as part of the extension of the fixed term contract or, from fixed term to permanent e.g. hours then amend these now. Note: remember to amend the working pattern if the hours change
- Click on the **Save** button. The following message will be displayed under the employees name

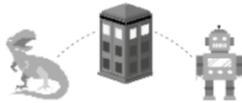
 Changes have been saved.

- Click on the right arrow  to move to the next step of the process chain

Step 2 of the process chain is displayed

- The Effective date box is displayed. This should still be set to the effective date of the change. Click on **OK**

Effective date



Please enter the date you wish to view or edit this information from.

OK CANCEL

- The **Occupancy Details** screen is displayed:

Occupancy details (as of 08/02/2023) Test Team Lead





Current status	<input type="text" value="Live"/>
Occupant	<input type="text" value="Mr Joe Test"/>
Occupancy start	<input type="text" value="26/01/2023"/>
Occupancy end	<input type="text" value=""/>
Occupancy type	<input type="text" value="Standard"/>
Position occ. reference	<input type="text" value="767310001"/>
Expected occupancy end date*	<input type="text" value="22/11/2024"/> 
Expected occupancy end reason	<input type="text" value="Other"/>

Monthly Contributions Reconciliation

Role identifier

Save

- **Occupancy start date** is the employee's start date in the position
- Occupancy type is set to one of the following by the HR Service Centre. Do not amend this

Occupancy type: Standard

on occ. reference: Acting Up, Secondment, Standard

expected date: 22/11/2024

- To amend the fixed term contract end date and/or reason, amend the **Expected occupancy end date** and/or **Expected occupancy end reason**
- If you are making a fixed term employee permanent, then the contents of the **Expected occupancy end date and/or Expected occupancy end reason** fields need to be deleted. **Note:** you must amend the 'Expected occupancy end reason' first by selecting the blank option (which appears at the top of the list) as shown below:

Current status: Live

Occupant: Apprenticeship, Awaiting HCPC registration, Cover - Maternity, Cover - Sickness, Cover - Vacancy

Occupancy start: New payroll provider, Other

Occupancy end: Peaks in demand and change, Project / Initiative, Reorganisation

Position occ. reference: Reorganisation / Closure / Merger, Special needs - statemented children, Voluntary early retirement

Expected occupancy end date *

Expected occupancy end reason: Other

This will then allow you to delete the **Expected occupancy end date**

- When required changes have been made then click **Save**
- Click on the right arrow  to move to the next step of the process chain

Step 3 of the process chain is displayed

- The **Position Details** screen is displayed:

Position details (as of 08/02/2023) Test Team Lead



Job title *	<input type="text" value="Test Team Lead"/>
Start date *	<input type="text" value="01/11/2022"/>
End date change	<input type="checkbox"/>
End date	<input type="text"/>
Position reference	<input type="text" value="PA2035289"/>
Location	<input type="text" value="Shire Hall, Warwick, CV34 4RL"/>
Work location	<input type="text" value="Shire Hall, Warwick, CV34 4RL"/>
Structure security group	<input type="text"/>
Occupant	<input type="text" value="Mr Joe Test"/>
Reporting unit	<input type="text" value="Warwickshire Test Unit"/>
Reports to	<input type="text" value="Admin Officer"/>
	Mr Joe Booth (26/01/2023 -)
Reporting post	<input type="text"/>
Expected position end reason	<input type="text"/>
Expected position end date	<input type="text" value="03/02/2023"/>

- If the position was also set up with an expected position end reason and end date (e.g. for a time limited period to cover a vacancy, then the **Expected position end date and/or reason** also need to be reviewed and updated in line with any changes to the employee's fixed term contract or removed if it is becoming permanent
- When required changes have been made then click **Save**.
- Click on the right arrow to move to the next step of the process chain
- The following message is displayed. Click on **Cancel**

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The chain process has finished. Do you want to start a new one?

OK

Cancel

Important Notes:

- If transferring a fixed term employee to a permanent contract in the same position and any other contractual details need to be updated as a result of this change i.e. working patterns, scp etc. then you must follow the appropriate guidance for making the necessary changes.

Notifications

- Your employee will receive a system notification email when you update their Expected occupancy end date and/or reason.
- As a manager, you will receive a system notification email 30 days before the Expected occupancy end date and you are required to review the fixed term contract and take the appropriate action i.e. extend it for a further period or make the employee a leaver.

Returning to People Manager Homepage

- Click the Logo in the top left hand corner of the screen
- If you would like to stay in this employee's record to view other information, click on the employee's name.

For further information or support please refer to Your HR on the [Intranet](#) or please raise a request through the [HR Service Desk](#) or phone on 01926 738444

Creation Date	15/12/17
Author	NB
Review Date	V1.1 08/03/18 AA V1.2 16/09/21 AA – make FT permanent V1.3 08/02/23 (10.46) JB