

Guidance Notes on Processing the Workstructures – Organisation and Location Establishment Form

Purpose

The Workstructures – Organisation and Location Establishment form is a multi-purpose form which can be used for requests to create, delete and amend Organisations and Locations as required by the Electronic Staff Record (ESR). This guide should help you in completing the form correctly, however should you require further assistance please contact your local HR Consultant who will be able to help.

PLEASE NOTE: The Workstructures – Organisation and Location Establishment form must be sent electronically in all cases. A covering e-mail from the budget holder / authorised signatory will be accepted in place of a signature.

Part 1: Organisation and Location Establishment Form

Section A: Organisation Details

Responsibility: Budget Holder

This will be applicable if you wish to create a new organisation, cancel an organisation or amend details of a current organisation on ESR.

For amendments to existing organisations, the budget manager must complete all applicable sections in the 'Existing Organisation' column, and enter the information which is changing in the 'New Organisation/Amendments to Existing Organisation' column.

For new organisations the budget holder must complete all applicable sections in the 'New Organisation/Amendments to Existing Organisation' column

1. **Is this Request to:** Please tick the appropriate box to indicate whether this request is to create a new organisation, cancel an organisation or to amend details of a current organisation.
2. **Organisation Name:** If this is a change to an existing organisation then enter the existing organisation name in the 'Existing Organisation' column and any changes in the 'New Organisation/Amendments to Existing Organisation' column. If this is a new organisation, enter the new details in the 'New Organisation/Amendments to Existing Organisation' column.
3. **Organisation Valid From:** If this is a change to an existing organisation, leave the 'Existing Organisation' column blank. For both amendments to an existing organisation and for new organisations, enter the date that the change will take effect from in the 'New Organisation/Amendment to Existing Organisation' column.

4. **Organisation Valid To:** If this change is to cancel an existing organisation, enter the date that the organisation will be valid to in the 'Existing Organisation' column. If this is a change to the valid to date for an existing organisation, or a new organisation which will only exist for a fixed period of time, then enter the valid to date in the 'New Organisation/Amendments to Existing Organisation' column.
5. **Location:** If this is a change to an existing organisation, enter the existing location name in the 'Existing Organisation' column. If the location is changing, or this is a request for a new organisation, enter the new details in the 'New Organisation/Amendments to Existing Organisation' column. If this is new Location, enter 'New location' and complete Section B: Locations Details.
6. **Cost Centre Code:** If this is a change to an existing organisation, enter the existing cost centre code in the 'Existing Organisation' column. If the cost centre code is changing, or this is a request for a new organisation, enter the new details in the 'New Organisation/Amendments to Existing Organisation' column. Cost centre code details can be obtained from your Financial Planning contact.
7. **Cost Centre Code Description:** If this is a change to an existing organisation, enter the existing cost centre code description in the 'Existing Organisation' column. If the cost centre code description is changing, or this is a request for a new organisation, enter the new details in the 'New Organisation/Amendments to Existing Organisation' column.
8. **Parent Organisation:** If this is a change to an existing organisation, select from the picklist the existing parent organisation in the 'Existing Organisation' column. If the parent organisation is changing, or this is a request for a new organisation, select from the picklist the new details in the 'New Organisation/Amendments to Existing Organisation' column.
9. **Is this Organisation a Payslip Delivery Point?** If this is a new or amended organisation that needs to be allocated as a payslip delivery point, please tick yes.
10. **Is Form ESR-FRM-107A attached?** If existing positions and the current incumbent(s) of those positions need to be transferred to the new/amended organisation, please provide details on form ESR-FRM-107A and tick the box to indicate that this is attached. See Part 2 for guidance on completing the ESR-FRM-107A form.

Section B: Location Details
Responsibility: Budget Holder

This will be applicable if you wish to create a new location, cancel a location or amend details of a current location on ESR.

For amendments to existing locations, the budget manager must complete all applicable sections in the 'Existing Location' column, and enter the information which is changing in the 'New Location/Amendments to Existing Location' column.

For new locations the budget holder must complete all applicable sections in the 'New Organisation/Amendments to Existing Organisation' column

1. **Is this Request to:** Please tick the appropriate box to indicate whether this request is to create a new location, cancel a location or to amend details of a current location.
2. **Location Short Name:** If this is a change to an existing location then enter the existing location name in the 'Existing Location' column. For both amendments to locations and new locations, leave the 'New Location/Amendments to Existing Location' column blank.

3. **Location Description:** If this is a change to an existing location then enter the existing location description in the 'Existing Location' column and any changes in the New Location/Amendments to Existing Location' column. If this is a new location, enter the new details in the 'New Location/Amendments to Existing Location' column.
4. **Location Valid From:** If this is a change to an existing location, leave the 'Existing Location' column blank. For both amendments to an existing location and for new locations, enter the date that the change will take effect from in the 'New Location/Amendment to Existing Location' column.
5. **Date Location Expires:** If this change is to cancel an existing location, enter the date that the location will expire in the 'Existing Location' column. If this is a change to the expiry date for an existing location, or a new location which will only exist for a fixed period of time, then enter the valid to date in the 'New Location/Amendments to Existing Location' column.
6. **Address Lines 1 to 3:** If this is a change to an existing location, enter the existing address lines 1 to 3 in the 'Existing Location' column. If the address is changing, or this is a request for a new location, enter the new details in the 'New Location/Amendments to Existing Location' column.
7. **Town:** If this is a change to an existing location, enter the existing Town in the 'Existing Location' column. If the Town is changing, or this is a request for a new location, enter the new details in the 'New Location/Amendments to Existing Location' column.
8. **County:** If this is a change to an existing location, enter the existing County in the 'Existing Location' column. If the County is changing, or this is a request for a new location, enter the new details in the 'New Location/Amendments to Existing Location' column.
9. **Post Code:** If this is a change to an existing location, enter the existing Post Code in the 'Existing Location' column. If the Post Code is changing, or this is a request for a new location, enter the new details in the 'New Location/Amendments to Existing Location' column.
10. **Telephone:** If this is a change to an existing location, enter the existing telephone number in the 'Existing Location' column. If the telephone number is changing, or this is a request for a new location, enter the new details in the 'New Location/Amendments to Existing Location' column.
11. **Fax:** If this is a change to an existing location, enter the existing fax number in the 'Existing Location' column. If the fax number is changing, or this is a request for a new location, enter the new details in the 'New Location/Amendments to Existing Location' column.
12. **Is this Location a Payslip Delivery Point?** If this is a new or amended location that needs to be allocated as a payslip delivery point, please tick yes.
13. **Is Form ESR-FRM-107A attached?** If existing positions and the current incumbent(s) of those positions need to be transferred to the new/amended location, please provide details on form ESR-FRM-107A and tick the box to indicate that this is attached. See Part 2 for guidance on completing the ESR-FRM-107A form.

Section C: **Budget Manager Authorisation**
Responsibility: *Budget Holder*

The designated budget holder must print their name and enter the date and their contact number in the relevant boxes. The form must then be sent electronically to their Financial Planning e-mail account.

Section D: Finance Authorisation
Responsibility: Financial Planning Manager

Financial Planning must complete section D and then forward the form by e-mail to 'HR Workforce Information Office'

Part 2: Workstructures – Organisation and Location Establishment Supplementary Form

The Workstructures – Organisation and Location Establishment Supplementary form is to be used for requests to transfer an existing position(s) to a different organisation or location, where that organisation or location does not already exist on ESR.

It is used to identify the staff in the original position so that the change may then be actioned on their individual assignments without the need for individual contractual change forms to be completed. The ESR-FRM-107A must be submitted with the main form ESR-FRM-107. Once the position changes have been made in ESR the information will be sent automatically from HR Workforce Information to NHSBT Pay Support so that the position changes can be applied to the affected individual assignments.

Action Required *Budget Holder*

Enter the following details onto form ESR-FRM-107A:

1. Current Position Number
2. Position Title
3. Assignment Number (if the position is vacant then leave this field blank)
4. First Name (if the position is vacant then leave this field blank)
5. Surname (if the position is vacant then leave this field blank)
6. Effective Date of Change

The completed ESR-FRM-107 and ESR-FRM-107A forms must then be sent by e-mail, by the designated budget holder, to the 'HR Workforce Information' e-mail address.

This process is to be used for transferring existing positions, and the current incumbent(s) of those position(s), to a different organisation or location. The form cannot be used for the routine transfer of individual assignments to a new position number. In those cases the normal change to contractual details form should be completed.