



HR Administration Procedures

<client logo>

1. DOCUMENT MANAGEMENT

As a general principle, correspondence between Target HR and <company name>, employees and prospective employees will be by email, electronic forms/letters where possible.

Target HR will set up an electronic file for each new employee. For existing employees with paper files only, when a new employee event takes place, such as a Change to Terms and Conditions, the opportunity will be taken to create an electronic file for that employee and scan any future paper documents to it.

Where in the following processes paper documents are required (eg signed documents), wherever possible, they should be scanned upon receipt or signature at <company name> offices and emailed to Target HR<company name>@target-hr.co.uk for filing on an electronic file.

Target HR will maintain the electronic files in accordance with the Data Protection Act, for example checking that only appropriate and accurate data is filed.

Target HR will not maintain any client personnel files on its own computer systems.

<company name> will be responsible for scanning all paper documents and ensuring the paper copies are either filed or destroyed depending on company policy.

2. OFFER OF EMPLOYMENT

After the selection of a suitable candidate the line manager should complete an Employment Authorisation form and email it to <designated signatory> for authorisation.

The <designated signatory> should print the form, sign it as authorisation, scan and email it to Target HR –, copying in the line manager and Payroll. Also emailed (scanned where necessary) should be:-

SAMPLE ONLY

The line manager can now make a verbal offer.

Upon receipt of the Employment Authorisation form and other relevant paperwork, Target HR will prepare and email to the line manager :-

- An Offer Letter.
- The Principle Statement of Employment (Contract of Employment).
- Where not provided already:
 - Application form.
 - Equal Opportunities Monitoring form.

Target HR will also:-

- Create a new electronic file for the recruit.
- Update the electronic staff records.
- Place copies of all documents on the electronic file.

The line manager should print, sign and dispatch the offer letter, contract and enclosures, and confirm to Target HR by email that the offer pack has been sent.

3. ACCEPTANCE OF OFFER

When the offer letter has been signed by the new recruit, accepting the offer, the signed letter, and any outstanding enclosures, (eg passport, application form etc) should be scanned and emailed to <company name>@target-hr.co.uk, copying in Payroll.

Target HR will check the documents and place on the electronic file.

Target HR will apply for references for the candidate on behalf of <company name>. References will be sought to cover at least the previous 3 years' employment.

4. START UP PROCESS FOR NEW EMPLOYEE

Target HR will ensure that the signed contract, references and all the necessary paperwork has been received.

If any of the paperwork has not been received after 14 days, Target HR will chase the line manager and/or referees.

If any documents are still outstanding 3 working days prior to the planned start date, Target HR will contact the line manager to confirm that the appointment should still proceed. If for any reason the appointment does not go ahead, Target HR will notify Payroll immediately.

Once any references have been returned,

SAMPLE ONLY

If Target HR receives a reference reply which gives cause for concern, it will be brought to the attention of the line manager.

5. PROBATION PERIOD

As part of the New Starter process Target HR will set probationary period reminders.

Approximately 2 weeks prior to the Interim Probation Review date, Target HR will forward the review form via email to the line manager for completion.

It will be the responsibility of the line manager to

SAMPLE ONLY

If there are performance issues during the probation period the line manager should contact Target HR for advice on courses of action.

The final "End of Probation Report" form will be forwarded to the line manager approximately two weeks before the end of the probation period.

The Final Report form should be completed by the line manager and emailed to Target HR. On receipt of the completed “End of Probation” report form stating satisfactory completion of the probation period Target HR will:-

- Prepare a letter to advise the employee that he/she is confirmed in post on a permanent basis. The letter will be emailed to the line manager with a copy to Payroll. The line manager should print, sign and hand the letter to the employee.
- File a copy of the confirmation letter on the employee’s electronic file.

If the probation period is extended, Target HR will again prepare a letter to confirm this, email it to the line manager for issue, and place a copy on the electronic file.

If the employee is to be dismissed at any time during, or at the end of the probation review period, advice should be sought from Target HR, who will also provide the relevant confirmation letter.

6. CHANGE TO TERMS AND CONDITIONS

The line manager should agree a change to terms and conditions of employment e.g. salary, job title, hours, notice period with the employee. If the employee does not agree to the change in terms, advice should be sought from Target HR.

The line manager should complete a Change to Terms and Conditions form and email it to the <designated signatory> for authorisation.

The <designated signatory> should

SAMPLE ONLY

Target HR will prepare the contract variation letter, email it to the line manager and place a copy on the electronic file.

The line manager should print, sign and hand the letter to the employee.

The employee should hand a signed copy of the letter back to the line manager, who should then scan and email it to Target HR.

Target HR will file the letter on the electronic file and update the electronic employee record.

7. CHANGES TO PERSONAL DETAILS

In this context, personal details are name, address, marital status, bank or building society and next of kin.

The employee should

SAMPLE ONLY

Target HR will place a copy of the form on the electronic file and update the electronic employee record.

8. MORTGAGE REFERENCE REQUEST

If <company name> receive a mortgage reference request it should be scanned and emailed to Target HR.

Target HR will complete the reference, gathering information from Payroll where necessary, and dispatch directly to the mortgage company.

A copy of the reference and request will be placed on the employee's electronic file.

If the mortgage offer is urgent and dependent on the reference, Target HR will, endeavor to process a mortgage request within 24 hours.

9. PARENTAL LEAVE

When an employee wishes to take leave in accordance with the parental leave regulations, they should complete the Parental Leave Application form and email it to their line manager for authorisation.

The manager should

SAMPLE ONLY

Target HR will file a copy of the application and confirmation/decline on the electronic file.

10. DEPENDANTS LEAVE

An employee who wishes to take time off work to care for a dependant should discuss this with their line manager and then complete the electronic application form. The form should be emailed to the line manager for authorisation.

NOTE: Dependant leave is a company policy (see Employee Handbook) and should not be confused with the statutory right to take a reasonable amount of unpaid leave to deal with an emergency relating to dependants.

The line manager should

SAMPLE ONLY

Target HR will file a copy of the application and confirmation/decline on the electronic file.

11. MATERNITY

The employee should notify her manager that she is pregnant and the manager should advise Target HR by email.

Target HR will email the employee and send her the Guidelines to Maternity Leave and any Maternity forms that need to be completed.

The employee should discuss with her manager (referring to the Guidelines and Company Policy) when she wishes to commence maternity leave.

Following these discussions the employee should

SAMPLE ONLY

Upon receipt of the forms, Target HR will prepare a letter to the employee to confirm her maternity leave dates and her entitlement to maternity pay, both SMP and Occupational Maternity Pay. The letter will be emailed to the line manager and a copy placed on the employee's electronic file.

The line manager should print, sign and pass the letter to the employee.

The line manager should notify Target HR immediately if there are any changes affecting the dates of the maternity leave, eg maternity related sickness, premature delivery.

The line manager should

SAMPLE ONLY

Any changes to terms and conditions should be initiated and authorised in the normal way, in accordance with Section 6 CHANGES TO TERMS AND CONDITIONS.

If the employee decides that she does not wish to return to work following maternity leave, this is a resignation and the normal leaver's process in section 12 should be initiated.

12. LEAVING EMPLOYMENT

The employee should put their resignation in writing and pass the letter to their line manager.

The line manager should

SAMPLE ONLY

Upon receipt of Leaver/Termination of Post Notification, Target HR will:-

- Prepare a Leaver's letter.
- Prepare a Leaver's questionnaire. Target HR will discuss with the line manager whether a telephone exit interview would be of value, and if appropriate carry this out on <company name> behalf.
- File the letter of resignation, Leaver's letter and forms on the employee's electronic file.
- Move the electronic file into the Leavers' folder.

Note: For employees who are leaving for other reasons, e.g. redundancy, capability, conduct or ill-health, the whole process should be carried out with advice from Target HR.

When completed Leaver's questionnaires are received they should be scanned and/or emailed to Target HR.

Target HR will include an analysis of Leavers' questionnaires in the monthly Board Report.

13. EX- EMPLOYEE REFERENCE REQUEST

Any request for a reference for an ex-employee should be scanned and emailed to Target HR.

Target HR will prepare the standard reference response and dispatch directly.

The reference request and a copy of the response will be placed on the employee's electronic file.