

# Staff Connect Self Service User Guide Higher Duties / Salary Flexibility Online Form

<b>Date Last Updated</b>	<i>November 2018</i>
<b>Document Version</b>	<i>1.0</i>

## Contents

1.	<b>THE HIGHER DUTIES / SALARY FLEXIBILITY FORM</b> .....	3
	<b>Common Information</b> .....	3
	<b>Preparation</b> .....	3
	<b>Raise the Form</b> .....	3
2.	<b>HIGHER DUTIES PROFESSIONAL STAFF</b> .....	6
	<b>General Information</b> .....	6
	<b>Completing the Form</b> .....	6
	<b>Form Sign Off</b> .....	8
3.	<b>HIGHER DUTIES ACADEMIC STAFF</b> .....	8
	<b>General Information</b> .....	8
	<b>Completing the Form</b> .....	9
	<b>Form Sign Off</b> .....	12
4.	<b>SALARY FLEXIBILITY</b> .....	13
	<b>General Information</b> .....	13
	<b>Completing the Form</b> .....	13
	<b>Form Sign Off</b> .....	15
	<b>Form Senior Executive Sign Off</b> .....	16
5.	<b>TRACKING PARTIALLY AND COMPLETED FORMS</b> .....	17
	<b>Ensuring the Form is Saved at each Step</b> .....	17
	<b>Returning to a Saved Form</b> .....	17
	<b>Checking the Progress of Forms (Workflow)</b> .....	17

# 1. THE HIGHER DUTIES / SALARY FLEXIBILITY FORM

## Common Information

For information regarding higher duties for Academic Staff please refer to the [Higher Duties Allowance for Academic Staff Policy](#). For information regarding higher duties for Professional Staff please refer to the [Higher Duties for Professional Staff Policy](#). For information regarding salary flexibility please refer to the [Salary Flexibility Policy](#).

This guide will be divided into the following sections:

- [Higher Duties for Professional Staff](#)
- [Higher Duties for Academic Staff](#)
- [Salary Flexibility](#)

The electronic form is divided into sections, and each section contains instructional material or guidance on questions in that section. Sections will require completion to be able to progress to the next page. This allows data entered in one section to be available in the next. Data is validated as you progress through the form, and provides instant error feedback if you enter invalid data into a field.

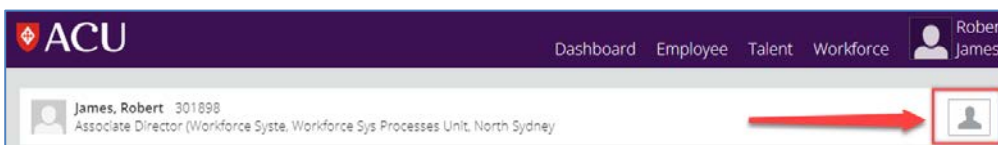
## Preparation

Before commencing the Higher Duties for Academic/Professional Staff section of the form obtain the relevant position information required to complete the form. One way to do this is to use the Org Chart feature in Staff Connect to browse to the position and record the position description.

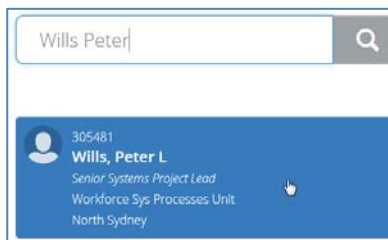
## Raise the Form

Log into Staff Connect.

In the same way that a paper based form has the name of the staff member written at the top, the electronic form requires the same process. The way to identify which staff member the form is for is to click on the **Staff Selector**.

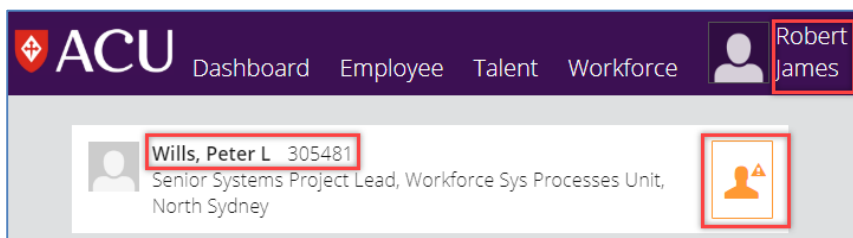


In the **Change Employee** screen the staff member can be found by either scrolling through the listed names or typing the name into the search field at the top of the screen. If typing the name of the staff member entering surname and then first name appears to provide the quickest search return. First name, surname does work as well. Click on the staff member's name that the form is being raised for.

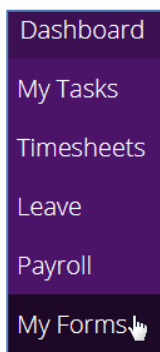


The Staff Connect screen now displays:

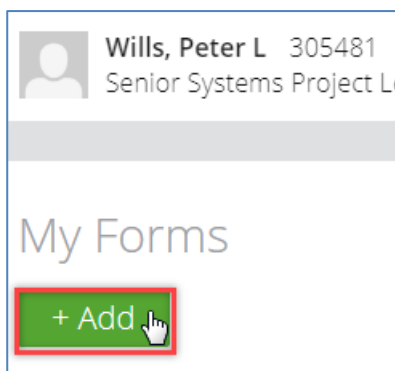
- the manager name in the top right hand corner
- the selected staff member's name in the body of the screen and
- the **Employee Selector** icon has now changed colour to orange with an exclamation mark.



To open the Higher Duties / Salary Flexibility (HDUTY.1) form click on **Dashboard > My Forms**

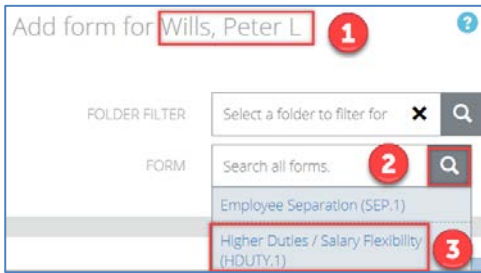


In the **My Forms** screen double check that the staff members name is still present. Click the **Add** button.



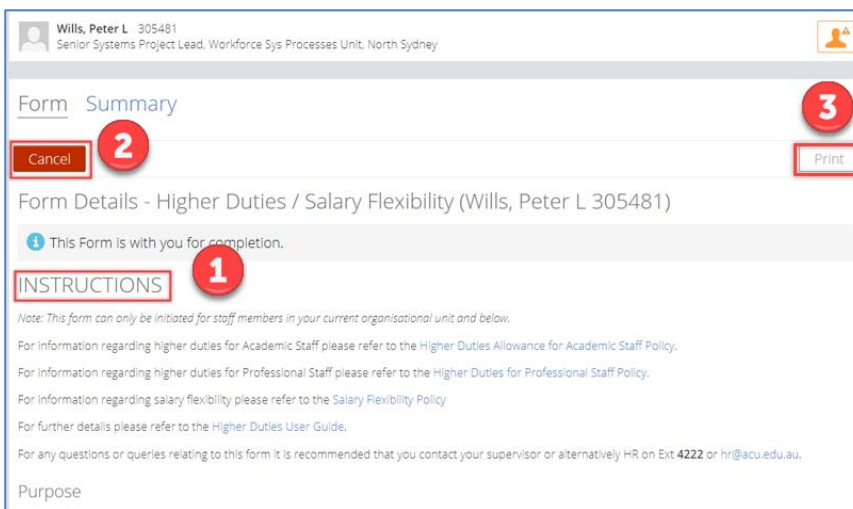
In the **Add form** screen:

- 1) note the name of the staff member you are submitting for,
- 2) click the form search button and
- 3) select Higher Duties / Salary Flexibility form and click the **Next** button.

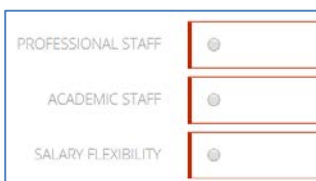


The Form Details are now displayed for the staff member.

- 1) Please read all page **INSTRUCTIONS** before commencing the form.
- 2) You can cancel a form at any time by using the **Cancel** button.
- 3) You can print the current page at any time by using the **Print** button.



Select the type of Higher Duties or Salary Flexibility by using the radio buttons at the bottom of the page. Note that red bordered fields are mandatory and in this instance at least one option must be selected.



This guide now diverges depending on the selection chosen above. Click the hyperlinks below to go to the relevant section of the guide.

- [Higher Duties Professional Staff](#)
- [Higher Duties Academic Staff](#)
- [Salary Flexibility](#)

Note that at any time the form can be saved by clicking the **Save** button and returned to at a later time for finalisation. Clicking the **Next** or **Previous** buttons also automatically saves the form.

To return to a saved form at a later time or to track where a form is up to in its workflow please read section 5. [Tracking Partially and Completed Forms](#)

## 2. HIGHER DUTIES PROFESSIONAL STAFF

### General Information

Please read the [Common Information](#) section above. It is strongly recommended that users of this form are familiar with the [Higher Duties for Professional Staff Policy](#) before completing.

### Completing the Form

Select the **PROFESSIONAL STAFF** radio button, click **Save** and select **Next**.

The screenshot shows a form with three radio button options: 'PROFESSIONAL STAFF', 'ACADEMIC STAFF', and 'SALARY FLEXIBILITY'. The 'PROFESSIONAL STAFF' option is selected and highlighted with a red box. Below the options, there is a 'Page 1 of 4' indicator, a 'Previous' button, a 'Next' button (highlighted with a red box), and a 'Save' button (highlighted with a red box).

Review the staff member's details and make sure they are currently correct. If they are incorrect then please contact HR about correcting the detail before proceeding.

Select the Organisational Unit that the staff member will be doing the Higher Duties in.

Select the Position that the staff member will be doing the higher duties in.

The screenshot shows the 'POSITION' section of the form. It includes an 'Acting Position' dropdown menu. The 'ORG UNIT FILTER' is set to 'Workforce Sys Processes (116)'. The 'RESPONSE' dropdown menu is open, showing a list of positions. The selected position is 'Associate Director (10605823)'. Below the dropdown, the following details are displayed: 'ORGANISATION UNIT Workforce Sys Processes (116)', 'OCCUPANT Vacant', 'CLASSIFICATION M120', 'HOURS PER WEEK 35:00:00', and 'LOCATION North Sydney'. A mouse cursor is pointing at the 'Associate Director (10605823)' option.

Click **Save** and then the **Next** button.

1. Select the **Higher Duties** Movement Reason.
2. Select the **Date From** which the higher duties is to commence from.
3. If a contract expiry date is in place for the employee it will be displayed.
4. Select the **Date To** for the higher duties. The duration must be in alignment with the requirements of the [Higher duties for Professionals Policy](#) and before the **Contract Expiry** date of the staff member, if one is in place.
5. The existing classification of the position will be displayed and cannot be changed.
6. It can be changed or a **HDA Percentage** can be applied.
7. Click the **SUBMIT** check box and click **Save**.

The screenshot shows a web form titled "Movement Type" with several input fields. Each field has a red circle with a white number (1-7) overlaid on it. The fields are: "RESPONSE" dropdown with "Higher Duties" selected (1); "RESPONSE" date field with "22 Aug 2018" (2); "RESPONSE" date field with "28 Feb 2019" (3); "RESPONSE" date field with "21 Nov 2018" (4); "RESPONSE" dropdown with "Senior Manager (M120)" (5); "RESPONSE" text field with "100" (6); and "SUBMIT" checkbox which is checked (7). At the bottom, there are "Previous" and "Next" buttons, a "Page 3 of 3" indicator, and a "Save" button highlighted with a red box.

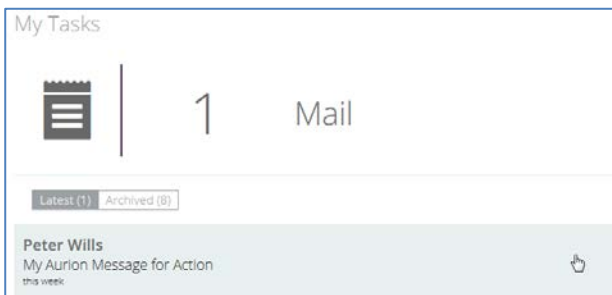
The **Submit** button becomes visible and can now be clicked to move to the next step in the workflow. A custom message can also be added to the submission. Note that the form will be escalated in line with delegation of authority.

The screenshot shows a form titled "Higher Duties / Salary Flexibility" with a help icon. Below the title is a blue information icon and the text "This Form will be sent to the recipient". The form has a "DETAILS" section with "Form: Higher Duties / Salary Flexibility" and "For: Wills, Peter L (Employee No 305481, Senior Systems Project Lead, Workforce Sys Processes Unit, North Sydney)". Below that is a "SEND TO" dropdown with "Diana Chegwidden (dichegwidden)" and a search icon. At the bottom is a "MESSAGE" text area containing "Here is the HDA form for Peter Wills." and a "Submit" button highlighted with a red box.

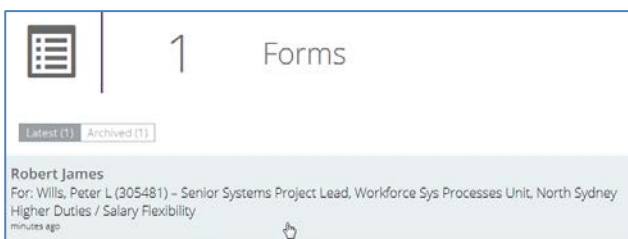
The supervisor will now be returned to their My Forms page where they can either return to their **Dashboard** or log out.

## Form Sign Off

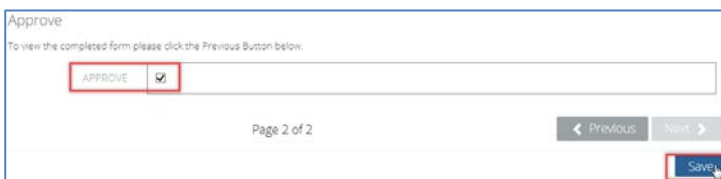
The form recipient will receive a **Mail** notification on their **My Task** page under their **Dashboard**.



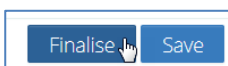
There will also be a new **Form** under the Dashboard. To begin processing the form click the notification.



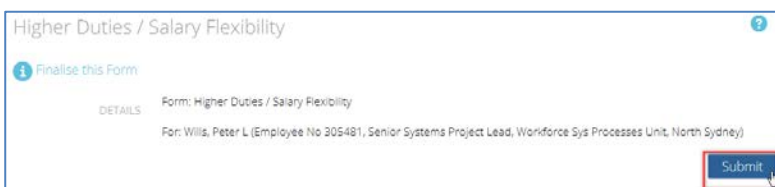
After reviewing the details of the form the sign off manager can either check **Approve** and **Save** at the bottom of the form or the **Return** button at the top of the page if they require a change or more detail.



The form can now be finalised by clicking the **Finalise** button at the bottom of the page. At any time the form can be saved by clicking the **Save** button and returned to at a later time for finalisation.



The final **Submit** button can now be selected.



The form continues in the above manner until sign off by a member of the Executive in line with delegation. After the final sign off the form will be received by HR for processing.

## 3. HIGHER DUTIES ACADEMIC STAFF

### General Information

Please read the [Common Information](#) section above. It is strongly recommended that users of this form are familiar with the [Higher Duties Allowance for Academic Staff Policy](#) before completing.



## Completing the Form

Read the [Raise the form](#) section above.

Select the **ACADEMIC STAFF** radio button, click **Save** and select **Next**.

PROFESSIONAL STAFF

**ACADEMIC STAFF**

SALARY FLEXIBILITY

Page 1 of 4

< Previous Next >

Save

Review the staff member's details and make sure they are currently correct. If they are incorrect then please contact HR about correcting the detail before proceeding.

Select the Organisational Unit that the staff member will be doing the Higher Duties in.

Select the Position that the staff member will be doing the higher duties in.

POSITION

Acting Position

ORG UNIT FILTER National Sch of Arts (69) x Q

RESPONSE National Head (10604267) Q

Page 2 of 3

< Previous Next >

Save

Click Save and then the **Next** button.

1. Select the **Higher Duties** Movement Reason.
2. Select the **Date From** which the higher duties is to commence from.
3. If a contract expiry date is in place for the employee it will be displayed.
4. Select the **Date To** for the higher duties. The duration must be in alignment with the requirements of the [Higher Duties for Academics Policy](#) and before the **Contract Expiry** date of the staff member, if one is in place.
5. The existing classification of the position will be displayed but this is NOT what the HD will be paid at. It will be greyed out and unchangeable.

PLACEMENT DETAILS

Position  
RESPONSE National Head (10604267)

Reports to Position  
RESPONSE Executive Dean (10603796)

Movement Type  
RESPONSE Higher Duties  1

Date From  
RESPONSE 21 Aug 2018  2

Contract Expiry  
RESPONSE 28 Feb 2019  3

Date To  
RESPONSE 26 Oct 2018  4

Classification  
RESPONSE Academic Level E Increment 1 (ACE1)  5

In the Allowance section there are several options. Note that if the staff member wishes to elect to have the allowance paid into a **Professional Pursuits Account**, then the staff member will be required to complete the [New Code Request Form](#) with Finance and then provide the project code to HR Payroll. Until the code is received by HR the allowance will be paid as part of regular salary.

Select the appropriate Higher Duties Allowance code. If Allowance **Higher Duties Other** has been selected then please provide a per annum amount. This will then require delegated approval at the Senior Executive level.

Allowance Code

Please select from the following Higher Duties Allowance codes. An appropriate workload allocation will need to occur for the when one of the following allowances are paid. If you are unsure which of the allowances to apply then please contact HR for advice or refer to the policy [Higher Duties Allowance for Academic Staff](#).

RESPONSE Nat. Head School Range 4

Amount

If Allowance Higher Duties Other has been selected then please provide a per annum amount. This will then require delegated approval at the Senior Executive level.

RESPONSE

In the Costing section the default costing can be left in place or updated. To update the costing click on the existing costing line.

Costing Details

Any change to costing here will be an update to both the recipients ordinary hours and the allowance being paid.

<input type="checkbox"/>	PERCENTAGE	COST CATEGORY 1	COST CATEGORY 2	COST CATEGORY 3	COST CATEGORY 4
<input checked="" type="checkbox"/>	100	AUS National (91)	National School of Arts Admin Office Prj-OP Tracked (10-111)	Default Activity (9999)	

+ Add row

Change the values as required including the costing percentage if necessary.

Costing Details

PERCENTAGE

COST CATEGORY 1

COST CATEGORY 2

COST CATEGORY 3

COST CATEGORY 4

If the percentage is now less than 100 then an additional line of costing will need to be added by clicking the + Add row button. Note that total percentage must equal 100% or an error will be generated.

<input type="checkbox"/>	PERCENTAGE	COST CATEGORY 1	COST CATEGORY 2	COST CATEGORY 3	COST CATEGORY 4
<input type="checkbox"/>	50	VIC Melbourne (10)	National School of Arts Admin Office Prj-OP Tracked (101110-111)	Default Activity (9999)	

+ Add row

Click the new blank row and then complete the additional details.

<input type="checkbox"/>	PERCENTAGE	COST CATEGORY 1	COST CATEGORY 2	COST CATEGORY 3	COST CATEGORY 4
<input type="checkbox"/>	50	VIC Melbourne (10)	National School of Arts Admin Office Prj-OP Tracked (101110-111)	Default Activity (9999)	
<input checked="" type="checkbox"/>	*				

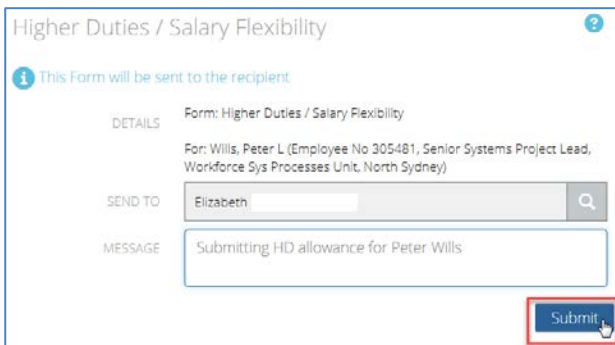
When the details on the page are complete click the **Submit** checkbox. Click **Save** and then **Next**.

Submit

SUBMIT

Page 3 of 3

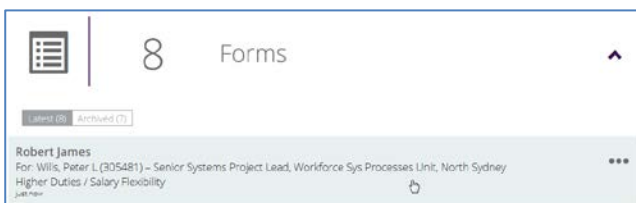
The next approver will be visible and a message can be added. Click the **Submit** button and the form will be electronically sent.



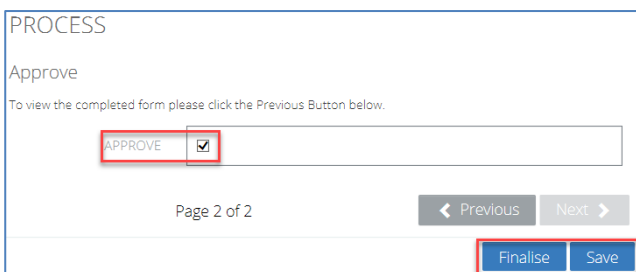
The user will now be returned to their **My Forms** page where they can either return to their **Dashboard** or log out.

## Form Sign Off

The form recipient will receive a **Mail** notification on their **My Task** page under their **Dashboard**. A new form will also be present in **My Tasks > Forms**. The body of the form can be clicked to see the form detail.



The form content should be checked for accuracy. The form can be **Returned** and a message sent back to the line manager if necessary. Otherwise check the **Approve** checkbox, click the **Save** button and click the **Finalise** button.



The approver will now be returned to their **Dashboard > My Tasks** page in Staff Connect.

The form is now received by HR for processing.

## 4. SALARY FLEXIBILITY

### General Information

Please read the [Common Information](#) section above. It is strongly recommended that users of this form are familiar with the [Salary Flexibility Policy](#) before completing.

### Completing the Form

Read the [Raise the form](#) section above.

Select the **SALARY FLEXIBILITY** radio button, click **Save** and select **Next**.

The screenshot shows a form with three radio button options: 'PROFESSIONAL STAFF', 'ACADEMIC STAFF', and 'SALARY FLEXIBILITY'. The 'SALARY FLEXIBILITY' option is selected and highlighted with a red box. Below the options, there is a 'Page 1 of 4' indicator, a 'Previous' button, a 'Next' button (highlighted with a red box and a mouse cursor), and a 'Save' button.

Review the staff member's details and make sure they are currently correct. If they are incorrect then please contact HR about correcting the detail before proceeding.

Select the **Date From** which the Salary Flexibility is to commence from.

If a contract expiry date is in place for the employee it will be displayed.

Select the **Date To**. It must be before the expiry date of the staff member or an error message will be generated.

The screenshot shows three date selection fields: 'Date From' with a value of '21 Aug 2018', 'Contract Expiry' with a value of '28 Feb 2019', and 'Date To' with a value of '30 Nov 2018'. Each field has a 'RESPONSE' label and a calendar icon.

Select the method of Salary Flexibility, either an **Amount** or a **Percentage**.

The screenshot shows a section titled 'Salary Flexibility by:' with the instruction 'Select whether the Salary Flexibility is by either Amount or Percent'. Below this, there is a 'RESPONSE' label and a dropdown menu. The dropdown menu is open, showing 'Amount' and 'Percent' options. A mouse cursor is pointing at the 'Percent' option. The word 'Value' is visible on the left side of the form.

If you select **Percent** then enter a percentage value to be paid over the duration between the date range selected above. The example below represents 10% of the difference between the staff member's usual substantive rate and the rate paid for the higher grade.

RESPONSE	Percent
Value	
Either record the percentage amount or the per annum dollar amount of the Salary Flexibility	
RESPONSE	10

If you select **Amount** then enter a **per annum** dollar amount that will be apportioned over the date range selected above. The example below represents \$10,000. For the sake of abundant clarity if you selected \$10000 per annum and had a date range of six months then \$5000 in total would be paid in equal instalments over the six months.

RESPONSE	Amount
Value	
Either record the percentage amount or the per annum dollar amount of the Salary Flexibility	
RESPONSE	10000

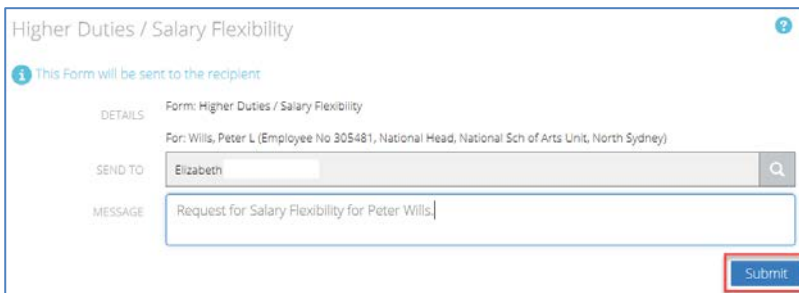
Click **Save** and then **Next**

< Previous	Next >
Save	

The **New FTE Annual Salary** will be displayed.  
Check the **SUBMIT** checkbox and click the **Save** button.  
The **Submit** button will then be displayed and can be clicked.

Form	Summary
Cancel	Print
Form Details - Higher Duties / Salary Flexibility (Wills, Peter L 305481)	
This Form is with you for completion.	
PLACEMENT DETAILS	
New FTE Annual Salary	
This figure represents the new FTE Annual Salary.	
RESPONSE	128009
PROCESS	
Submit	
SUBMIT	<input checked="" type="checkbox"/>
Page 3 of 3	
< Previous	Next >
Save	

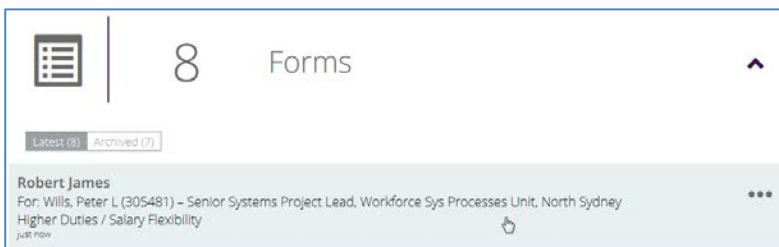
The next recipient will be displayed and a message can be added to the form. Click the **Submit** button.



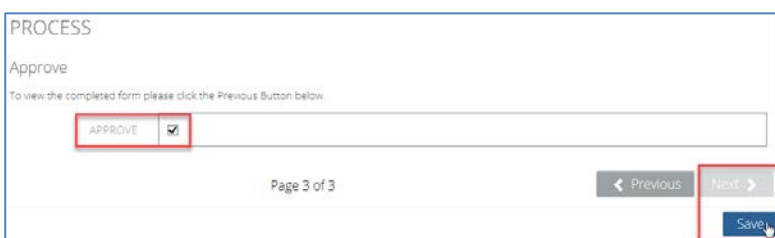
The user will now be returned to their **My Forms** page where they can either return to their **Dashboard** or log out.

## Form Sign Off

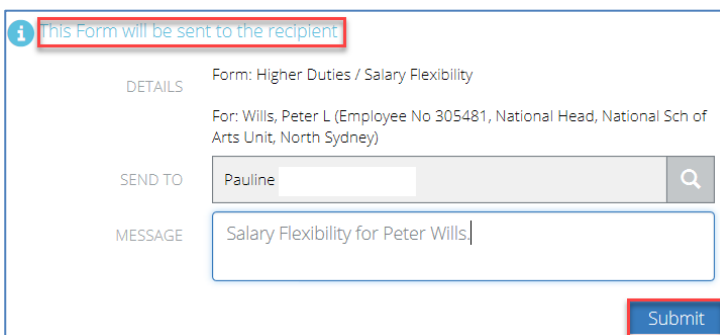
The next form recipient will receive a **Mail** notification on their **My Task** page under their **Dashboard**. A new form will also be present in **My Tasks > Forms**. The body of the form can be clicked to see the form detail.



The form content should be checked. The form can be **Returned** and a message sent back to the line manager if necessary. Otherwise check the **Approve** checkbox and click the **Save** button. The **Finalise** button then becomes available and can be clicked.



The final authorising recipient will now be displayed. A message can be added. Click the **Submit** button.

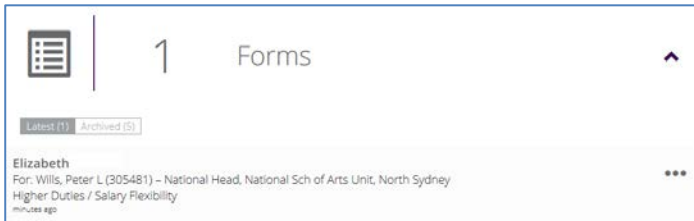


The user will now be returned to their **My Forms** page where they can either return to their **Dashboard** or log out.

## Form Senior Executive Sign Off

Salary Flexibility requires Senior Executive sign off as defined in the Delegation of Authority Policy and Register.

The form recipient will receive a **Mail** notification on their **My Task** page under their **Dashboard**. A new form will also be present in **My Tasks > Forms**. The body of the form can be clicked to see the form detail.

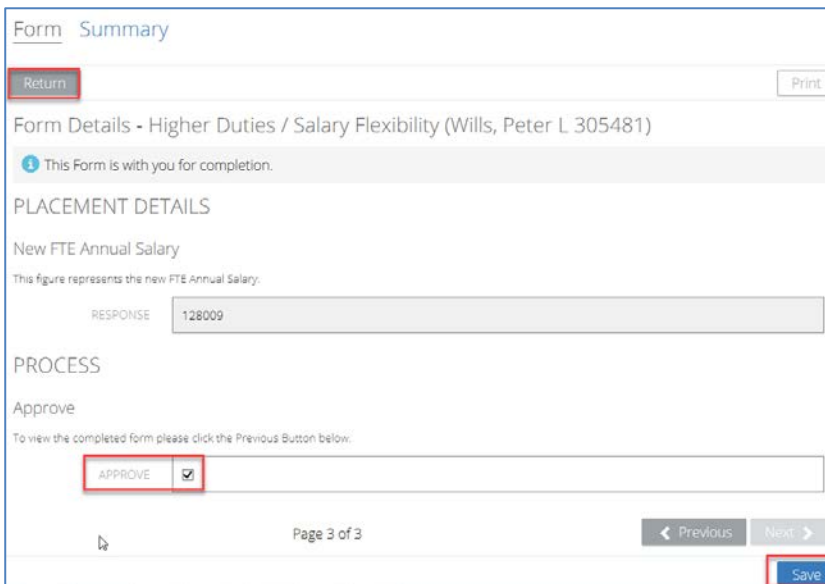


The form content should be checked.

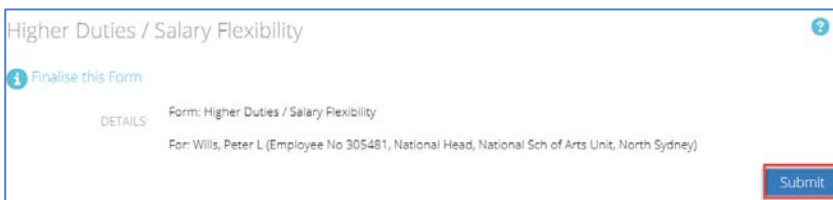
The form can be **Returned** and a message sent back to the line manager if necessary.

Otherwise check the **Approve** checkbox and click the **Save** button.

The **Finalise** button then becomes available and can be clicked.



Click the **Submit** button.



The approver will now be returned to their **Dashboard > My Tasks** page in Staff Connect.

The form is now received by HR for processing.



## 5. TRACKING PARTIALLY AND COMPLETED FORMS

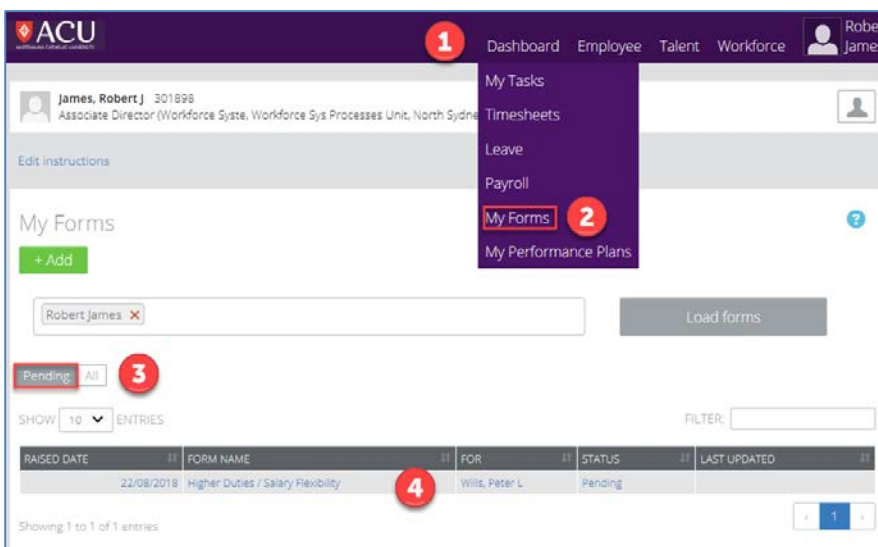
### Ensuring the Form is Saved at each Step

At any time during form completion you can click the **Save** button. This will ensure if the form is not complete at any given time it is saved for future editing. Clicking the **Next** or **Previous** buttons also takes a snapshot save of the form at that point in time. If a Save has been taken then the user can safely log out of Staff Connect and resume the form completion at a later time.

### Returning to a Saved Form

Log into Staff Connect.

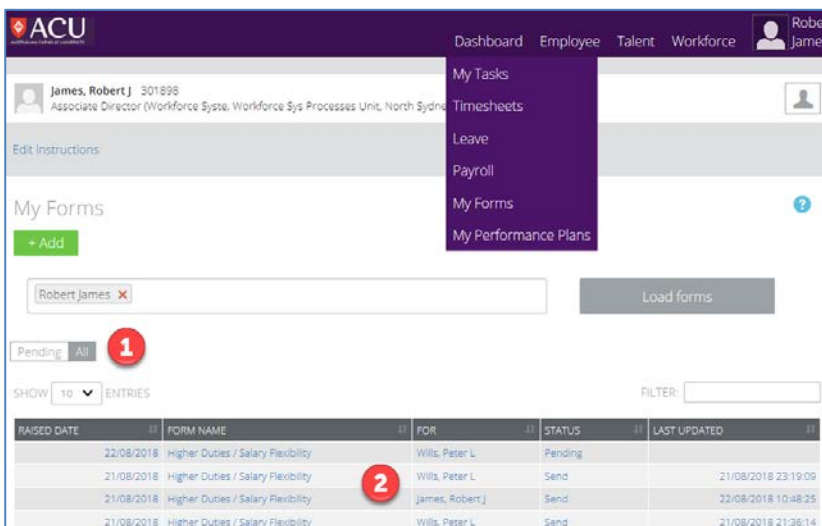
- 1) Select the **Dashboard** menu
- 2) select **My Forms**,
- 3) click on **Pending** (it is the default selected)
- 4) any form in progress is available to be chosen



### Checking the Progress of Forms (Workflow)

As per the above screen shot select the:

- 1) **All** filter next to the **Pending** filter.
- 2) The Pending or sent forms will be displayed



To check the status of a sent form click on it.

RAISED DATE	FORM NAME
22/08/2018	Higher Duties / Salary Flexibility
21/08/2018	Higher Duties / Salary Flexibility

The status of the form can be checked by:

- 1) reading the informational at the top of the form and
- 2) clicking on the **Summary** link.

James, Robert J 301898  
Associate Director (Workforce System, Workforce)

Edit instructions

Form **Summary** 2

Form Details - Higher Duties

1 This Form has been closed. 1

The **Summary** of the form provides a **Workflow Tracking** feature with date and time stamps.

Form **Summary**

Form Details ?

For *Wills, Peter L*

Raised Date *21/08/2018*

Last Action Date *22/08/2018*

Workflow Ruleset *HDUTY - ANYONE Higher Duties C1*

**Workflow Tracking** ?

ACTIONED DATE / TIME	USER	ACTION
22/08/2018 10:42:49	Pauline	Approve
21/08/2018 23:32:00	Elizabeth	Send
21/08/2018 23:19:09	Robert James	Send
21/08/2018 22:37:35	Robert James	Initiate

Exit the **Summary** by clicking on the **Dashboard** and **My Forms** menu.

Document end