

Guidance Notes for Organisation and Location Establishment Form

Purpose

The 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 People and Culture Partner and/or Consultant who will be able to help.

PLEASE NOTE: The Organisation and Location Establishment form must be sent electronically via HR Direct query in all cases.

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 or Amendments to Existing Organisation' column.

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

- **Is this Request to:**
 - Tick the appropriate box to indicate whether this request is to:
 - create a new organisation,
 - cancel an organisation.
 - amend details of a current organisation.

- **Organisation Name:**
 - Change to an existing organisation:
 - enter the existing organisation name in the 'Existing Organisation' column.
 - input changes in the 'New Organisation or Amendments to Existing Organisation' column.
 - If this is a new organisation:
 - enter the new details in the 'New Organisation or Amendments to Existing Organisation' column.

- **Organisation Valid From:**
 - Change to an existing organisation:
 - leave the 'Existing Organisation' column blank.
 - 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.

- **Organisation Valid To:**
 - Cancelling an existing organisation:
 - enter the date that the organisation will be valid to in the 'Existing Organisation' column.
 - Change existing organisation, or new organisation which will only exist for a fixed period:
 - enter the valid to date in the 'New Organisation or Amendments to Existing Organisation' column.

- **Location:**
 - Change to an existing organisation:
 - enter the existing location name in the 'Existing Location' column.
 - Existing organisation or a request for a new organisation:
 - enter the new details in the 'New Organisation or Amendments to Existing Organisation' column.
 - New organisation:
 - enter 'New location' in the 'New Organisation or Amendments to Existing Organisation' column and complete Section B: Location Details.

- **Cost Centre Code:**
 - Change to an existing organisation:
 - enter the existing cost centre code in the 'Existing Organisation' column.
 - Change to cost centre code or request for a new organisation:
 - enter the new details in the 'New Organisation or Amendments to Existing Organisation' column.
 - Cost centre code details can be obtained from your Financial Planning contact.

- **Cost Centre Code Description:**
 - Change to an existing organisation:
 - enter the existing cost centre code description in the 'Existing Organisation' column.
 - Change to cost centre code description or request for a new organisation:
 - enter the new details in the 'New Organisation or Amendments to Existing Organisation' column.

- **Parent Organisation:**
 - Change to an existing organisation:
 - select from the picklist the existing parent organisation in the 'Existing Organisation' column.
 - Parent organisation is changing, or request for a new organisation:
 - select from the picklist the new details in the 'New Organisation or Amendments to Existing Organisation' column.

- **Is this Organisation a Payslip Delivery Point?** No longer required.
- **Is Form ESR-FRM-107A attached?** No longer used.

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/or Amendments to Existing Location' column.

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

- **Is this Request to:**
 - Please tick the appropriate box to indicate whether this request is to:
 - create a new location.
 - cancel a location.
 - amend details of a current location.

- **Location Short Name:**
 - Change to an existing location:
 - enter the existing location name in the 'Existing Location' column.
 - Amendments to locations and new locations:
 - leave the 'New Location or Amendments to Existing Location' column blank.

- **Location Description:**
 - Change to an existing location:
 - enter the existing location description in the 'Existing Location' column.
 - Amendments to existing location and new location descriptions
 - enter new details in the New Location or Amendments to Existing Location' column.

- **Location Valid From:**
 - Change to an existing location:
 - leave the 'Existing Location' column blank.
 - Amendments to existing location and new locations:
 - enter the date that the change will take effect from in the 'New Location or Amendment to Existing Location' column.

- **Date Location Expires:**
 - Cancel an existing location:
 - enter the date that the location will expire in the 'Existing Location' column.
 - Change to the expiry date for an existing location or new location which will only exist for a fixed period:
 - enter the valid to date in the 'New Location or Amendments to Existing Location' column.

- **Address Lines 1 to 3:**
 - Change to an existing location:
 - enter the existing address lines 1 to 3 in the 'Existing Location' column.
 - Amendments to existing location and new locations:

- enter the new details in the 'New Location or Amendments to Existing Location' column.
- **Town:**
 - Change to an existing location:
 - enter the existing Town in the 'Existing Location' column.
 - Amendments to existing location and new locations:
 - enter the new details in the 'New Location or Amendments to Existing Location' column.
- **County:**
 - If this is a change to an existing location:
 - enter the existing County in the 'Existing Location' column.
 - Amendments to existing location and new locations:
 - enter the new details in the 'New Location or Amendments to Existing Location' column.
- **Post Code:**
 - Change to an existing location:
 - enter the existing Post Code in the 'Existing Location' column.
 - Amendments to existing location and new locations:
 - enter the new details in the 'New Location or Amendments to Existing Location' column.
- **Telephone:**
 - Change to an existing location:
 - enter the existing telephone number in the 'Existing Location' column.
 - Amendments to existing location and new locations:
 - enter the new details in the 'New Location/ or Amendments to Existing Location' column.
- **Fax:** No longer used
- **Is this Location a Payslip Delivery Point?** No Longer required.
- **Is Form ESR-FRM-107A attached?** No longer used.

Section C: Budget Manager Authorisation
Responsibility: Budget Holder

The designated budget holder must:

- print their name.
- enter the date.
- enter 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:

- then forward the form by e-mail to 'HR Direct.'