



NEW AND CHANGED JOBS PROTOCOL

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Documents to read alongside this protocol	Recruitment Policy
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Disclaimer

When using this document please ensure that the version you are using is the most up to date either by checking on the UHB database for any new versions. If the review date has passed please contact the author.

OUT OF DATE POLICY DOCUMENTS MUST NOT BE RELIED ON

Cardiff and Vale University Health Board

Version Number	Date of Review Approved	Date Published	Summary of Amendments
Tr1		2007	New process no previous Trust reference number issued/available
UHB1	16/08/2012	29/08/2012	More explicit on actions necessary. All processes to be undertaken in partnership

NEW AND CHANGED JOBS PROTOCOL

GUIDANCE NOTES FOR MANAGERS

INTRODUCTION

As a result of the introduction of the NHS Job Evaluation Scheme all posts within the UHB are graded by the Job Matching or Local Evaluation processes.

These Guidance Notes are to be used in Divisions, Departments or Directorates and are to be used in the following circumstances:

1. New Jobs - whenever new posts and new Job Descriptions are created to allow recruitment to be undertaken; and/or
2. Changed Jobs - whenever an employee's existing Job Description is amended to take account of changes in duties or responsibilities. This is in effect a personal regrading.

SCOPE

This Protocol applies to all staff employed under Agenda for Change Terms and Conditions.

NEW POSTS AND NEW JOB DESCRIPTIONS

Within the UHB, many thousands of Job Descriptions have been matched via the NHS Job Evaluation Scheme.

The basic premise of managing the New Jobs process is to allow the Workforce & OD Team to compare the newly developed Job Descriptions/Person Specifications with pre-existing matched Job Descriptions/Person Specifications to determine if the similarities are such that the new documents do not need submission to a Job Matching Panel.

The UHB has a database of all of the Job Descriptions and Effort Factor Proforma which have been submitted for banding. These documents could be used, in many cases, as templates to develop new job descriptions. Copies of the documents can be obtained from the Workforce & OD Directorate.

The steps to be followed in developing a new job description are outlined below

1. Where the need for a new role is identified, Departmental/Directorate Manager should develop an outline Job Description / Person Specification and Effort Factor Proforma. It is important to note that the key issue is that the new documentation outlines all of the responsibilities and duties and accurately states the required skills, knowledge and experience required to undertake the role.

When developing the documentation, the manager concerned will need to determine if there are any similar posts elsewhere within the Department, Directorate, Division or elsewhere within the UHB. As indicated above, previously matched Job Descriptions/Person Specifications could be used as template documents.

2. Any managers wishing to use a pre-existing Job Description/Person Specification as a template will need to ensure that the original Job Description had been fully matched. Where the banding outcome for the post was derived as a result of a Banding Review or as a result of a full Job Evaluation, the Job Description/Person Specification cannot be used as a template.
3. Where a pre-existing Job Description/Person Specification is as a template, the new duties/responsibilities should be added with these being highlighted via the Tracked Changes option in Word. The same approach will be needed with the Effort Factor Proforma.
4. The Proforma (Appendix A) must be completed and then e-mailed with the following documentation to the Divisional Human Resources Manager:
 - Job Description/Person Specification
 - Effort Factor Proforma

- Departmental/Directorate Expectations List
- Excel Spreadsheet Line for post

The manager must identify if the post requires evaluation for recruitment purposes and identify the recruitment deadlines. The documentation must be submitted with sufficient time for the post to be evaluated.

5. Following receipt of the documentation, the Divisional Human Resources Manager (or nominated representative) and a nominated trained Staff Representative will seek to determine if the post requires submission to a Job Matching Panel
6. If an original Job Description has been used as a template with Tracked Changes, the Divisional Human Resources Manager (or nominated representative) and a nominated trained Staff Representative will determine if the new documentation is sufficiently similar/identical so as not to require submission to a Job Matching Panel. In reaching this decision, the manager and Staff Representative may seek advice from the Job Evaluation Team.
7. If the manager has not used an original Job Description as a template, the Divisional Human Resources Manager will determine if there are similar posts elsewhere within the Department, Directorate, Division or elsewhere within the UHB. Where similar posts do exist, Divisional Human Resources Manager (or nominated representative) and a nominated trained Staff Representative will determine if the new documentation is sufficiently similar/identical so as not to require submission to a Job Matching Panel.
8. As an alternative approach, where the manager has not used an original Job Description as a template, if it is determined that the role in question matches an Agenda for Change National Job Profile, the Divisional Human Resources Manager will be able to obtain those Job Descriptions from within the UHB which have matched against the profile in question. The comparison exercise outlined above, can then be undertaken.

9. If the comparison exercises in 6/7 above determine that the posts are not similar, the documentation will be submitted for banding via e-mail to Job.Descriptions@wales.nhs.uk
10. If the job cannot be matched the manager concerned will complete a Job Analysis Questionnaire based on knowledge of the job requirements. The Job Evaluation Team will discuss the processing time with the manager concerned in order to agree realistic recruitment deadlines.
11. The Banding Outcome for the post will be communicated via e-mail to the Line Manager and the Divisional Human Resources Manager. Additionally, the Payroll and ESR Departments will be advised to ensure that a position is created on the ESR system for the new post.
12. If the Line Manager is not satisfied with the Banding Outcome, he/she has the right to request a Review. The exact nature of the Review and the different courses of action open will depend on the nature of the evaluation and would need to be discussed between the Line Manager and the Job Evaluation Team.

Any Review would need to be submitted within **3 months** of notification of the Banding Outcome

13. The Line Manager will follow the agreed processes to allow all position number to be created on the ESR system and for the post to be advertised.
14. Once the new post holder has been in post for a suitable period of time (minimum six months*), they will be expected to sign off and agree their Job Description and Effort Factor Proforma with their manager. If it is felt that the post duties/responsibilities are significantly different at this review, the manager and the post holder may instigate the Changed Jobs element of this procedure (see Section B below)

** the post holder will need to have undertaken the duties for at least six months to be able to understand the range of duties and*

responsibilities associated with the role, enabling them to provide comprehensive information for any review

CHANGED JOBS (REGRADINGS)

1. Although jobs change all the time, managers and staff should be aware that only significant changes to the post are likely to affect the Banding Outcome for the post.
2. In determining whether the changes in the job are significant, managers and staff should consider the following questions:
 - Have there been significant increases/decreases in post responsibilities?
 - Have there been changes affecting educational/training requirements for the job?
 - Has the degree of initiative to undertake the post increased/decreased?
 - Has the degree of supervision required increased/decreased?
3. Where it has been determined that the changes have occurred, the starting point will be the individual's matched Job Description and Effort Factor Proforma. This will be the template on which additional duties/responsibilities are added via the Tracked Changes option in Word.
4. The changes to the original documentation must be jointly agreed between the manager and the employee concerned and this must be signed off as being accurate, up to date. All parties will need to be aware that if the changes result in a higher pay band, the Department concerned will need to fund the re-banding.
5. The Proforma (Appendix B) must be completed and e-mailed with the following documentation to the Divisional Human Resources Manager:
 - Job Description/Person Specification
 - Effort Factor Proforma

- Departmental/Directorate Expectations List
- Excel Spreadsheet Line for post, including any post holders (where applicable)

The manager (and the post holder(s) where appropriate) must identify the date when the amended Job Description became effective.

6. The documentation will then be forwarded to the Agenda for Change Office via e-mail to Job.Descriptions@wales.nhs.uk
7. The amended Job Description/Person Specification and Effort Factor Proforma will be examined, in partnership, by the Job Evaluation Lead Consistency Checkers to determine if the changes are sufficient to warrant submission to a Job Matching Panel.

If the conclusion is that the changes are not sufficient, the manager and the individual employees will be advised accordingly. There will be no right of appeal.

If the conclusion is that the changes are sufficient, the new documentation will be forwarded to a Job Matching Panel.

8. The Matching Panel will attempt to evaluate the post but it is very important to note that the revised Job Description will be treated as a new job. The post will be matched afresh and **no** account will be taken of the original job match scores.
9. If the post cannot be matched **and** is occupied by a current post holder(s), the post holder (or nominated post holders) will complete an outline Job Analysis Questionnaire. The optimum time to do this may be one month after commencing the changed role.
10. The Banding Outcome for the post will be communicated via e-mail to the Line Manager and the Divisional Human Resources Manager.
11. Where the Pay Band is different to that of the current post holder(s), the Line Manager will complete the Staff Changes Form

and backdate to the date when the amended Job Description became effective.

12. If the Line Manager and/or the post holder(s) are not satisfied with the Banding Outcome, he/she has the right to request a Banding Review.

Any Banding Review would need to be submitted within **3 months** of notification of the Banding Outcome.

13. In line with the current arrangements, any Banding Review would need to identify which of the sixteen Factors of the NHS Job Evaluation Scheme the line manager and/or post holder(s) took issue with and provide evidence to support any assertions that they made.
14. Any Banding Review Outcome would be final and there would be no right of Review beyond this stage.
15. The Line Manager will be responsible for ensuring that the appropriate procedures are followed to ensure that the Establishment Details for the post are amended on the ESR system.

EQUALITY STATEMENT

Cardiff and Vale UHB is committed to ensuring that, as far as is reasonably practicable, the way we provide services to the public and the way we treat our staff, patients and others reflects their individual needs and does not discriminate, harass or victimise individuals or groups. These principles run throughout our work and are reflected in our core values, our staff employment policies, our service standards and our Strategic Equality Plan & Equality Objectives. The responsibility for implementing the scheme falls to all employees and UHB Board members, volunteers, agents or contractors delivering services or undertaking work on behalf of the UHB.

We have undertaken an Equality Impact Assessment and received feedback on this protocol and the way it operates. We wanted to know of any possible or actual impact that this protocol may have on any groups in respect of gender, maternity and pregnancy, carer status,

marriage or civil partnership issues, race, disability, sexual orientation, Welsh language, religion or belief, transgender, age or other protected characteristics. The assessment found that there was no impact to the equality groups mentioned.

REVIEW

This protocol will be reviewed in 3 years, or sooner if required by changes to Agenda for Change Terms and Conditions or relevant legislation.

Appendix A

PROFORMA FOR NEW POSTS AND NEW JOB DESCRIPTIONS

Division	
Directorate	
Department	
Job Code	
Post Title	
To Be Advertised	Yes/No (delete as applicable)
Recruitment Deadline	

Documentation Submitted

Job Description/Person Specification	
Effort Factor Proforma	
Department/Directorate Expectation List	
Spreadsheet Line	

Name		Date	
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To be completed by Divisional HR Manager

Does an identical/similar post exist?	Yes/No (delete as applicable)
If Yes, what is post banded as?	
Date Department notified	

If post requires evaluation, identify priority weighting:

Criteria	Score (1= lowest impact; 5 = highest impact)
Impact on patient care/clinical risk	
Impact on delivery of SAFF Targets	
Impact on delivery of Financial Targets	
Total	

Appendix B

PROFORMA FOR CHANGED JOB DESCRIPTIONS

Division	
Directorate	
Department	
Job Code – Current	
Job Code - New	
Post Title	
Current Pay Band	

Documentation Submitted

Job Description/Person Specification	
Effort Factor Proforma	
Department/Directorate Expectation List	
Spreadsheet Line	

Name (Manager)		Date	
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Name (Post Holder)		Date	
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Date Revised Job Description Became Effective	
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