

# CH6 - Changes to appointment (no pay impact)

Where changes impact on an individual's appointment only (e.g. amendment to job title or they have moved to a new location) these can be made without requiring further approval in CoreHR.

**Note:** Change of job title as a result of a regrading should not be managed via this process. Refer to **QRG: CH11\_Regrading** for details.

### What's changed?

Guidance added on changing the Work Group following the implementation of Self-service.

**September 18**



**Note:** If you are making a change because the employee will be working abroad please also refer to **QRG: PA5\_Working abroad**

## Navigate to: Personnel > Maintenance > Personal Profile

1. Search for the employee record and go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.
2. If relevant, click into the **Appointment ID** to ensure the correct appointment is highlighted.



**Note:** For Fixed Term appointments, click **View Appointment** and make a note of the current **Target End Date**.

3. Click the **Amend Appointment** button. The *Amend Appointment Details* window opens:

**Amend Appointment Details: Louise Wallton**

**Post Details**

Post Number: 229000 ADMINISTRATIVE SUPPORT  
Post Profile Type: 1A Permanent  
Effective Date: 01-JUN-2018 Target End Date: [ ]  
Planned End Date: [ ] Status: Commenced

**Hierarchy Details**

Company: 10 UNIVERSITY OF OXFORD  
Division: 20 FUTURE TECHNOLOGIES  
Sub Division: SD00 FUTURE TECHNOLOGIES  
Level 4: 9ZW001 FUTURE TECHNOLOGIES  
Management Unit: 9ZW0 FUTURE TECHNOLOGIES  
Department: ZW INSTITUTE OF FUTURE TECHNOLOGIES  
Pay Administered by: ZWDEP FUTURE TECHNOLOGIES  
Cost Centre: ZW0000000000 INSTITUTE OF FUTURE TECHNOLOGIES  
Location: 991 ZW - FUTURE TECHNOLOGIES  
Work Group: 100002 ZW Admin Support  
College Association: 1 DEFAULT/NOT APPLICABLE

**Appointment Details**

Post Type: 1A PERMANENT  
Project: [ ]  
Job Category: [ ]  
Job Title: ADM Job Text ADMINISTRATIVE SUPPORT  
Employee Status: 1A PERMANENT  
Sub Status: 3 PART TIME  
Category: X NOT APPLICABLE/NOT REQUIRED  
Sub Category: DC OFFICE/ CLERICAL SUPPORT  
Hours: 30.00 Weeks: [ ] FTE: 0.8219  
FTE Hours: 36.50 FTE Weeks: 52.0000 FTE%: 82.19  
Future Override FTE: [ ] Absence Mgt FTE: [ ]  
Pensionable: [ ] Acting Up Ind: [ ] Secondment: [ ]  
Action: NA NEW APPOINTMENT  
Reason Code: NS NEW STARTER - NEW TO UNIVERSITY  
Replaces Employee: [ ]  
Comments: [ ]

**Post Details:**

Please enter the post information for the employee on this screen.  
Details such as department, job title and cost centre may be entered here.

OK Cancel

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4. Enter the appointment change details as relevant:

Field Name (* mandatory)	Description
<b>Effective Date *</b>	Enter the date that the change will take place.
<b>Target End Date</b>	For fixed term posts, reapply the current target end date (noted previously), to confirm it still correct.
<b>Location *</b>	<p><b>Select new location (for place of work change).</b></p> <p><b>Note:</b> This is the address that will be used for the individual's payslip unless payroll is advised otherwise. Also see note on page 1 re working abroad.</p>
<b>Work Group*</b>	<p>Select Work Group for the individual. Leave as the default if the relevant Work Group is not available. New Work Groups can be requested by completing a Service Request, accessible from the <a href="#">HRIS Service Catalogue page</a>.</p> <p><b>Note:</b> This field determines which Self-Service Work Group the individual belongs to. A Self-Service manager who has been granted access to that Work Group can then view certain information about the individual in the Self-Service portal.</p> <p><b>Note:</b> Follow this guidance only if you are recording a genuine change to the employee's Work Group or if you are assigning a Work Group to a starter who has had subsequent appointment changes. If you are correcting an error in the Work Group field, or if you are returning to assign a Work Group from the default for a recent starter, please follow the guidance in <b>QRG: IP6 Tracking Changes and Correcting Records Section E</b>.</p>
<b>Job Title/ Job Text *</b>	<b>Change job text or title (if relevant).</b>
<b>Action *</b>	Enter the relevant action e.g. <b>Job title amendment.</b>
<b>Reason Code *</b>	Enter the relevant reason code e.g. <b>General Administration.</b>
<b>Comments *</b>	Enter any relevant comments.

5. Click . The *Amend Appointment Details* window closes.

6. A message confirms that changes have been made. Click .

7. Exit all windows back to the Personnel main screen.

**NEXT STEPS:** A letter to confirm the changes should be sent to the individual. Templates are available in Core: Tools > Letters: Change in Job Title and Change in Place of Work.

1	+2,000
0	+5,000
1	+1,500
0	+1,125
0	+1,062

### Useful Reports

To help track changes, including changes to appointment details don't forget to regularly run:  
PERDEP20 Monthly Personnel Changes