This guide helps you to establish the appointing route/guide to follow when appointing any type of a new starter, rehire or transfer, as well as regrades and other significant contract changes that require the set-up of a new appointment in CoreHR.

Who is this guide for?  
HR Administrators.  
Section 2 is for new users of People Management and must be read in full. All other sections are aimed at all People Management users.

How to use this guide  
Work through the flow chart. This helps you to identify the correct starting point from the Command Centre in People Management. This is essential as following the wrong starter route will result in errors.  
The table diagram offers further clarity with ensuring the correct starting point.
- Horizontal values represent the area of the Command Centre to start from  
- Vertical values represent the criteria to help you confirm the correct starting point

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1. Appointing: where to start in People Management

- **START**
  - Do you currently have access to the person’s current active appt. in Core?
    - Yes
      - Did the person apply online for this new role?
        - Yes
          - **Applicants** follow Appoint successful applicants and new starters guide
        - No
          - **New Starter** follow Appoint successful applicants and new starters guide
    - No / Additional appt. / Don’t know
      - Does the person have an existing appt. in another dept. that will be replaced (not adding an additional)?
        - Yes
          - **Transfers** follow Transfer between departments guide
        - No / dormant record
          - **Employee** follow either Add an additional appointment within the same dept guide or Replace contract within the same dept guide
### Criteria to confirm starting point

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Use when</th>
<th>Person is</th>
<th>Recruited as</th>
<th>Appointment is</th>
<th>Do not use when</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>New Starter</strong></td>
<td>it's a new role not advertised through recruitment</td>
<td>presumed new to the University / a rehire / unsure</td>
<td>direct appointment: named on a grant / offered directly / recruited by external agency</td>
<td>a new appointment / possibly replacing an existing appointment / possibly an additional</td>
<td>transferring, ie replacing existing appt. from diff. dept. / person applied online / person knowingly exists in your dept.</td>
</tr>
<tr>
<td><strong>Employees</strong></td>
<td>replacing contracts (changes from a staff request) or adding additional appointments</td>
<td>existing staff member in your dept.</td>
<td>direct appointment / not advertised, appt. eg change resulting in a raised staff request</td>
<td>replacing an existing appointment / an additional</td>
<td>transferring, ie replacing existing appt. from diff. dept. / person applied online</td>
</tr>
<tr>
<td><strong>Applicants</strong></td>
<td>the role was advertised through Recruitment</td>
<td>presumed new to the University / a rehire / existing staff member</td>
<td>applicant who applied online</td>
<td>a new appointment / possibly replacing an existing appointment / possibly an additional</td>
<td>transferring, ie replacing existing appt. from diff. dept. / role/ appt.change was not advertised through online Recruitment</td>
</tr>
<tr>
<td><strong>Transfers</strong></td>
<td>University positions held elsewhere are being replaced</td>
<td>existing staff member outside of your dept.</td>
<td>direct appointment / applicant applied online</td>
<td>replacing an existing appointment held outside of your dept.</td>
<td>adding an additional appt. to member of staff outside of your dept. / new appt. for someone in your dept.</td>
</tr>
</tbody>
</table>
2. Appointing overview (for new users of People Management)

New appointments/contracts arise when:
- A successful applicant applied via the online Recruitment portal, and the recruitment process was managed in CoreHR Recruitment.
- An individual did not apply through the online Recruitment portal, eg hired through an agency or named on a grant, known as a ‘Direct appointment’.
- A staff member moves into a new appointment in a different department (which is outside of your system access in CoreHR). This is a transfer.
- There is a significant change during someone’s employment, requiring a new contract/staff request/appointment (but employee remains in your department). This includes regrades, changes to funding with a change to project, change to contract type etc.
- An existing staff member takes on an additional appointment.

People Profiles

Employment status will impact the system steps, and values entered in some fields, in the appointing wizard. Understanding these differences ensures accuracy of records. Below is an overview of staff groups/employment statuses. Check the People Profile Matrix and the HR Support website for full details and guidance.

<table>
<thead>
<tr>
<th>Profile</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees</td>
<td>Employed on a Chancellors Masters and Scholars of the University of Oxford contract, also known as CMS. Employees benefit from enhanced employment benefits; see HR Support website. This includes those on variable hours contracts and Marie Curie fellows and researchers.</td>
</tr>
<tr>
<td>Workers</td>
<td>Workers include: Casual Workers, Casual Teachers, and Casual Examiners. They are not employees of the University. Predominantly, only statutory benefits apply. They are paid in response to claim forms, on an hourly rate of pay (equating to the appropriate grade for the work). Casual staff are restricted on how long they can work at the University, eg up to 12 weeks for casual workers. For more guidance see the HR Support website. <strong>NB Variable hours employees</strong> are also paid in response to claim forms, but they are <em>University employees</em> (see above).</td>
</tr>
<tr>
<td>Non-employees</td>
<td>The main non-employee groups are: Agency workers, Marie Curie Students* and ‘Others’. It is mandatory to record Agency workers in CoreHR; after 12 weeks’ service they become entitled to the same basic terms and conditions as a University employee. ‘Others’ includes academic visitors and contractors; see the full list on the HR Support website. Follow local practice for record-management of these non-employee groups. <strong>Temporary Staffing Service (TSS)</strong> staff records are managed by the TSS team. *Marie Curie Students have exceptional arrangements; refer to relevant guidance.</td>
</tr>
</tbody>
</table>
Terminology explained

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff Request (SR)</td>
<td>An online form in CoreHR. It must first be completed and approved at departmental/divisional level. This is the first system step for recruiting someone, or when making certain staff changes that require a staff request. These must then be ‘graded’ in some cases, and then approved and processed in the system by the Reward team.</td>
</tr>
<tr>
<td>Post</td>
<td>Created by the Reward team from the SR, and has a six-digit unique ID number, eg 123456. It is the original record of the job, which specifies the position’s organisational hierarchy, grade, top-level HESA category and employment status. There’s usually only one appointment per post.</td>
</tr>
<tr>
<td>‘Bucket’ Post</td>
<td>Used for some worker and non-employee appointments. They are not created from a SR, and have a generic name (ie not a code), eg CASUAL.</td>
</tr>
<tr>
<td>Appointment</td>
<td>Appointments usually match the post details, and are based on the agreed terms and conditions. They have a unique number, made up of the post number followed by a ‘/’ and then a sequence number, eg 123456/1. The Appointment is normally fully managed by an administrator.</td>
</tr>
<tr>
<td>Vacancy</td>
<td>The Reward team create a ‘skeleton’ of a vacancy for a department to then populate further, should they advertise it on the University’s website/Internal Job Board. This won’t be used in all cases, eg when appointing directly (eg someone named on a grant). In such cases, the unused vacancy must be closed. A vacancy is used to record successful/unsuccessful applicants, advertisement details and the selection panel.</td>
</tr>
</tbody>
</table>

Before you begin

Before you begin appointing you will need the following details:

- Post number - an automatic email confirmation, which includes the unique reference numbers for the post, appointment and vacancy will be sent to the SR Approver(s). See guidance on Planning Recruitment.
- Basic personal details of the individual
- Contracted hours
- Agreed salary point