How-To Guide

Appoint successful applicants and new starters

Use this guide for the following appointing scenarios:

- Applicants – successful candidates that applied for a vacancy via our online Recruitment.
- New Starters – individuals who did not apply via our online Recruitment, eg named on a grant.

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<th>Please read the How-To Guide: Appointing – where to start in People Management.</th>
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<td>How to use this guide</td>
<td>This guide covers process steps for appointing. It must not be followed from start to finish, as some steps might not apply or may be undertaken at a separate time. There are question prompts throughout, to help you establish the steps to follow, with hyperlinks to the relevant section. Please also use the relevant Scenario Factsheet(s).</td>
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<td>Next</td>
<td>Follow the How-To Guide: Complete the Appointing Wizard.</td>
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This guide covers the following process steps:

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1. Starting point in People Management

Core Portal > Employee Dashboard > People Management > Command Centre

Identify your process route:

Did the individual apply online through our Recruitment?

Yes – follow the Recruitment – Successful Applicant appointing process.

No – follow the Direct – New Starter appointing process.

Recruitment – Successful Applicant

1. Click VIEW next to Applicants in the Command Centre.
2. A list of applicants will load. Search for your successful applicant by part or all of their name.
3. When found, click on their row to highlight, and check the Vacancy ID/Post number are as expected.
4. Check whether the Personnel No (in the third column) is populated.

Is it populated?

Yes – identify what to do with their existing appointment; ie transfer, replace or add additional. Follow New Appointment (successful applicant) process after completing step 5 below.

No – complete a duplicate employee check. Follow Duplicate Employee Check process after completing step 5 below.

5. Click the blue APPLY button at the bottom right of the screen.

Direct – New Starter

Do you currently have access to the person’s record in People Management?

Yes – the individual is a current staff member in your department. Abort this process and either follow the How-To: Replace a contract within the same department guide and relevant scenario factsheet or the How-To: Add an additional appointment within the same department guide.

No – the individual could be new to the University / a rehire / an existing staff member (outside your CoreHR security access). Follow the system steps below:

Note* Pre-employment checks must be initiated before ‘direct appointees’ are appointed in the system and issued a conditional offer letter and/or contract.

1. Click on the blue NEW STARTER button from the Command Centre.
2. A list of posts will load. Search for the post using the Post Number (a six-digit number, from the email from the Reward Team). For ‘bucket’ posts (i.e., for casuals, non-employees, agency staff etc) search with the bucket post name, see relevant scenario factsheet for this information.

**Note** * If the post is not displayed as expected check whether it has been linked to the vacancy. If so, unlink it before continuing with the appointment process. Ask your recruitment administrator or follow the Manage unplanned recruitment events guide to unlink the post.

3. Click on the correct post once, to highlight.

**Note** * For bucket posts if multiple posts exist ensure you select the post with the status ‘Auto Commenced’ not ‘Auto Commenced (approved)’.

4. Click the blue NEXT button at the bottom right of the screen.
5. Follow the Duplicate Employee Check process.

**Note** *
- The vacancy created by the Reward Team for this post won’t be used and must be closed. Failure to do so will produce inaccurate reporting and may impact system performance. Ask your recruitment administrator or follow the Close a vacancy guide to unlink the post from the vacancy.
- Remember to ensure that all direct appointees (i.e., those who did not come through online Recruitment), including current employees, complete an Equality and Diversity form. Follow the Generate and download documents in CoreHR guide to create a pre-populated form to send to the new starter for completion.

2. New Appointment process (successful applicant)

Establish how to proceed with the existing appointment (also referenced as contract in CoreHR) and follow the relevant process steps outlined below. Also refer to the image below.

**What will happen to their existing appointment?**

a. **It needs to remain active;** this is an additional appointment. Follow the Add additional appointment process, label 2 in the image.

b. **It needs to be replaced** with this new appointment. Answer the question below relating to replacing appointments, label 1 in the image.

**Can you see any appointment details showing (see label 3 in the image below)?**

a. **Yes** - the individual is a current staff member in your department. Follow the Replace existing appointment process.

b. **No** – there is no appointment listed as per label 3 in the image. Abort this process; return to the Command Centre by clicking People Management in the breadcrumbs and follow the Transfer between departments How-To guide.
Add additional appointment process

Follow this process when appointing someone into a new position within your department, who will also keep their existing position in your and/or another department.

**Note**: Total FTE must not exceed 1.

1. From the *New Appointment* screen (see image above) click on the circular (ie radio) button to select **Create New Additional Contract**.
2. Click **APPLY** bottom right of the screen.
3. This opens a three-step appointing wizard – **New Appointment**. As the staff member already has an existing employee record, you only need to complete details on **Organisational Structure**, **Contract Information** and **Salary Information**.
4. Follow the **Complete the Appointing Wizard** How-To guide, starting from the **Organisational Structure** section.

Replace existing appointment process

Follow this process only if the individual is already employed by your department, ie both their new and existing positions are within your department.

1. From the *New Appointment* screen (see image above) click on the circular (ie radio) button to select **Replace Existing Contract**.
2. Click once to highlight the existing appointment you wish to replace.

**Note**: There could be more than one existing appointment listed - be sure to select the correct appointment that you wish to replace. Click **VIEW** to see more details of the existing appointment. Click **New Appointment** in the breadcrumbs to return.

3. Click **APPLY** on the bottom right of the screen.
4. This launches a three-step appointing wizard, either **New Appointment** or **Replace Appointment**. As the staff member already has an existing employee record, you only need to complete details on **Organisational Structure**, **Contract Information** and **Salary Information**.
5. Follow the **Complete the Appointing Wizard** How-To guide (from **Organisational Structure** section).

3. Duplicate Employee Check

Always check if the individual has ever had a record in CoreHR. In most cases, staff must have one record only. A false duplicate record could impact pension and pay, result in incorrect employee history, and impact statutory reporting, such as HESA.
Some exceptions apply: Payroll provide a payroll bureau service to Linacre College, and a pensioner’s payroll. Some subsidiaries use CoreHR, including Oxford Said Business School Ltd (as per image on the right). For a full list of subsidiaries see ‘Level 1 Entity Name’ of the Org Chart, from the PRAS website. Where there is an existing record with one of these, ignore it and create a new employee record.

NB Kellogg, Parks and St Cross colleges are University departments. If your new starter has an existing record with one of these, select their record and do not create a new one.

1. Search separately on at least two of the following criteria: first name, surname and NI number.
2. Delete the previously entered search criteria, before entering the next one, to ensure you are searching on each item separately.

Note* Search thoroughly to check whether a staff record already exists. If you later find a duplicate record or you are in doubt, contact HRIS Support. If you expect to find the person, but are unable to do so and they were an employee after 01/08/03, contact HRIS Support. Do not create a new record.

Does the person already have a record?

a. Yes – the individual has an existing record in CoreHR. Follow the Existing record found process.
b. No – the individual does not have a record in CoreHR. Follow the Create New Employee process.

Existing record found - process

Establish how to proceed with the existing record (also referenced as contract in CoreHR) and follow the relevant process steps outlined below.

Paying attention to the Department column and the Action column what do you see?

a. Your department, New Contract – the individual is an existing staff member within your department. Follow the New Contract process.
b. Different department, Transfer – the individual is an existing staff member outside of your department. Follow the Transfer process.
c. Rehire – the individual has previously worked at the University and has a dormant record in CoreHR. Follow the Rehire process.
d. Linacre College / a Subsidiary / Pensioners payroll – create a new, duplicate record. Follow the Create New Employee process.

Create New Employee process

1. Click the blue CREATE NEW EMPLOYEE button bottom right of the screen.
2. This launches a four-step appointing wizard - New Starter.
3. Follow the Complete the Appointing Wizard guide, starting with Person Information.

Rehire process

1. Click once on the dormant employee record to highlight.
2. Click the blue NEXT button bottom right of the screen.
3. This opens a four-step appointing wizard - ‘Rehire Person’.
4. Follow the Complete the Appointing Wizard guide, starting with Person Information.

Note *
- The pre-populated fields in the appointing wizard are from the dormant record, not the application form. Review these and update, as required.
- If a warning message appears about continuous service, contact HRIS Support.
- Check if the employee has an override date in the continuous service screen. If it’s there, remove it, if there has been a break in service. See: Manage continuous service guide for guidance on this, and also Continuous Service Policy.
- If you know the person is definitely a rehire, do not make them a leaver and a rehire within the same payroll month. Appoint as a rehire only after the payroll has run.
- Rehires remain ‘Dormant’ until after their first payroll run. Set the status to ‘All’ when looking for the individual.
- To update the increment due date for the new appointment, if relevant, refer to the Change the increment due date guide.
- Rehired staff may have previous UDF records. Follow the Add and manage UDFs guidance to end previous records and add new ones.

Transfer process

1. Click once on the existing employee record to highlight.
2. Click the blue NEXT button bottom right of the screen.
3. The Replace or appoint additional contract box appears.
4. Select the appropriate option by clicking the relevant radio button (circle).
5. Click OK.

Selected Replace Existing Contract

When staff member will be leaving their existing appointment
1. The Transfers screen opens.
2. Now follow the Transfer between departments guide from Section 3 Receiving department requests the transfer, step two.

Selected Appoint Additional Contract

When staff member will be keeping their existing appointment
1. This launches a three-step appointing wizard - New Appointment.
2. Follow the Complete the Appointing Wizard guide, starting with Organisational Structure.

Note* Ensure their total FTE does not exceed 1.

New Contract process

What will happen to their existing appointment?

a. It needs to remain active; this is an additional appointment. Abort this process, return to the Command Centre by clicking People Management in the breadcrumbs, and follow the Add an additional appointment within the same department guide.
b. It needs to be replaced with this new appointment. Follow the Replace existing appointment process below.

**Replace existing appointment process**

1. Click once on the existing employee record to highlight.
2. Click the blue NEXT button bottom right of the screen.
3. This launches a three-step appointing wizard - ‘New Appointment’. As the staff member already has an existing employee record, you only need to complete details on **Organisational Structure**, **Contract Information** and **Salary Information**.
4. Follow the Complete the Appointing Wizard guide, starting from the **Organisational Structure** section.