

IP5 - Capturing outside appointments

In conjunction with guidance from Personnel Services, this guide should be used to ensure that Outside Appointment data is captured in Core. Use the data from the completed '[Form OA1](#)' to fill in this UDF and for Nil Returns use '[Form OA2](#)'.

What's changed?

Screenshot and table updated to reflect the changes to the revised OA1 form.

Sept 18

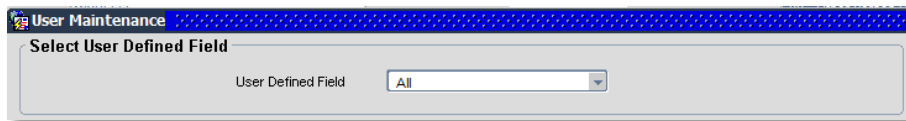
This guide covers the following process steps:


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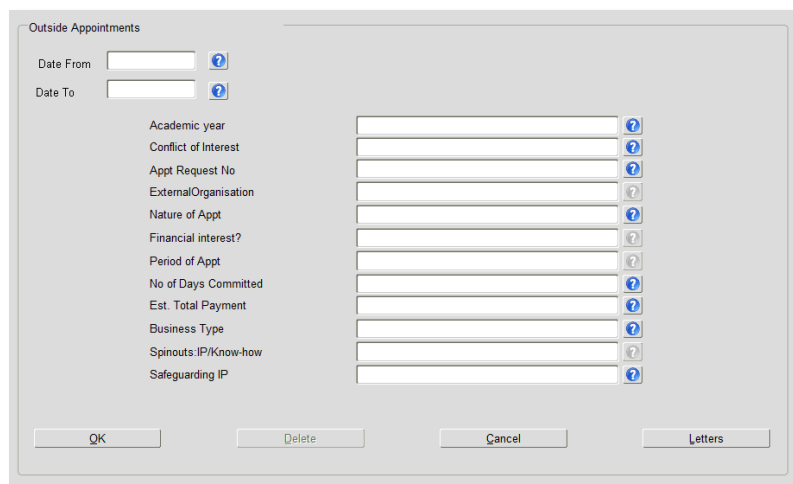
Navigate to: Personnel > Maintenance > Personal Profile

Entering outside appointment data

1. Search for and open the employee record and go to **Select box > Other Person Details**. The *User Maintenance* window opens.




2. Click to display the **User Defined Field** List of Values.
3. Select the required option **Outside Appointments**.
4. Click .



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5. Complete the relevant details:

Field Name	Guidance
Date From*	Enter the date the appointment was approved by the Head of Department. (Section 7 - Form OA1)
Date To	Leave blank. Entering a date into this field will mean that the UDF screen won't be returned in reports.
Academic year	Select the academic year in which the outside appointment will take place. A new record must be set up for each year the outside appointment applies , e.g. where an outside appointment runs from 1 June to 31 December, two records must be set up – but the appointment request number (field: 'Appt Request No'), needs to be the same.
Conflict of Interest	Select 'Y' or 'N' according to the answer (Section 6i – Form OA1)
Appt Request No	Select a number in sequence for each outside appointment held by the individual. The first appointment = 01 , the second appointment = 02 and so on. A new record must be created for each separate or new outside appointment. Academic staff only: Select NIL in this field at the end of the current academic year for academic staff who have not undertaken any outside appointments in the academic year. (See: Form OA2). Do not fill in any further information if there were no outside appointments.
External Organisation	Enter the name of the organisation with which the outside appointment is held, please include the city location.
Nature of Appt 	Select the relevant type from the list. (Section 2 - Form OA1) If an appropriate description is not listed select Other and include details in the Comment field below.
Financial interest?	If relevant, record details of any financial interest or shareholdings in this external organisation held by the employee. (Section 3 - Form OA1)
Period of Appt	Record the expected start and end dates of the outside appointment, eg '01/07/2016 – 30/09/2016. (Section 4 – Form OA1)
No of Days Committed	Select the number of days that will be committed to in this academic year (Section 4 – Form OA1). A new record must be created in cases where the appointment overlaps between two academic years . The number of days recorded must reflect the actual number of days committed/worked within the academic year chosen above. If the outside appointment spans more than 12 months, please ensure that a new entry is made in Core, recording the extra days beyond this 12-month period.

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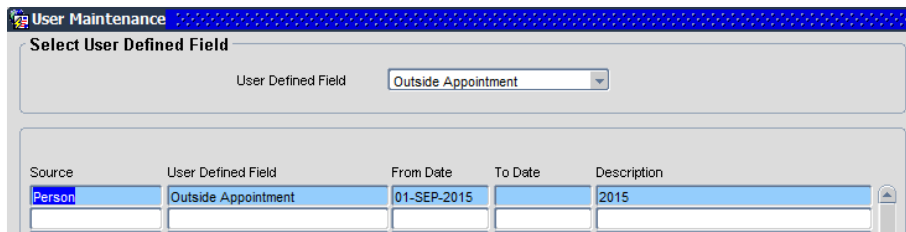
Est. Total Payment	If relevant, and if known, select the estimated total payment band for the appointment. (Appendix A (a) - Form OA1)
Business Type	Select the business type. (Appendix A (b) - Form OA1) If not known, leave blank.
Spin outs: IP/Know How	Enter any information (Section 3 – Form OA1)
Safeguarding IP	This is a statement that the proposed arrangement will safeguard University rights in intellectual property. Select 'Y' or 'N' or 'N/A' as noted (Section 6iii – Form OA1).

- Click , then and to exit the Outside appointments screen.

Amending outside appointment data

Having captured this information, if you need to amend or add to the record at a later date.

- As above, on the *Personal Profile* go to **Select** box > **Other Person Details** and click into the relevant **Outside Appointments** line:



- Click to open the record and amend as required.
- Click , then to exit the Outside appointment screen.

Useful Reports:

To view all outside appointments details entered in a UDF for academic and related staff, run **PERDEP48 Outside appointments**.