PA2b - Additional appointments

Once your preferred candidate has accepted your offer and the offer has been recorded in Core (see **QRG: PANS0_Pre-arrival and New starter guide**) they should be 'appointed', i.e. linked in the system to the relevant planned appointment and their funding allocated.

> **What's changed?**
> New section added as a reminder to check employees UDFs.
> ***Aug 19***

If they are an existing employee and they are not resigning from their current post then they can be appointed to an additional post as long as their total FTE does not exceed 1.

Refer to Recording start and end dates in CoreHR for guidance on the correct start date to enter to ensure the employee is paid correctly.

> **Note:** It is the appointing department's responsibility to check that the employee has the right to work in the UK and that it is recorded in the Right to Work UDF in Personnel.

> **Remember**: This is a new post for an individual and so will require a new contract. This will therefore mean that the employee will be contractually entered into a pension scheme even if they have previously opted out.

This guide covers the following process steps:

Navigate to: Personnel > Maintenance > Personal Profile

1. Click the [New Appointments] button. The *Applicants/Posts* window opens.

> How the employee applied for the post will drive the next steps, refer to:
> **Section 2.1**: If your employee applied for the post via e-Recruitment.
> **Section 2.2**: If your employee is a 'direct appoint' (i.e. not via e-Recruitment).

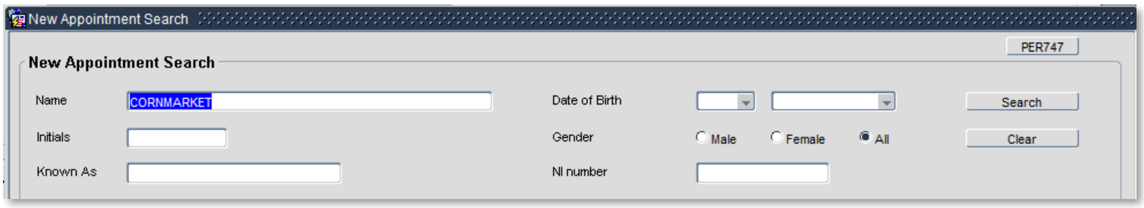
2. Locating the applicant or post

2.1 Via e-Recruitment

a. On the **Applicants** tab locate the relevant Applicant in the list, using the search criteria if needed. Check the **Post** and **Recruitment ID** (Vacancy number) are as expected.

b. Check if the **Personnel Number** is populated. If it is, then click the Select button to the right of the relevant Applicant. **Now go to step 3**

c. If the **Personnel Number** is not populated, click the Select button to the right of the relevant Applicant. The *New Appointment Search* window opens:



d. Use the Search criteria to locate the existing Employee. Enter the employee's **Name**.

e. Click Search.

f. Locate the relevant employee in the list.

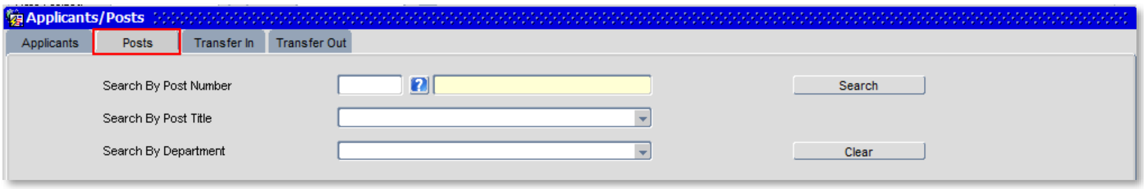
Note: If you are unable to locate the individual as expected, and they were an employee on, or since, 01/08/03 contact HRIS Support. Do not create a new record for the individual.

g. Click the Select button (to the right of the employee record). The system displays a message.

Note: If you are not entirely sure the existing person is the same person as your applicant then select *Cancel* and check the NI number or Date of Birth in order to confirm before continuing.

2.2: Not via e-Recruitment

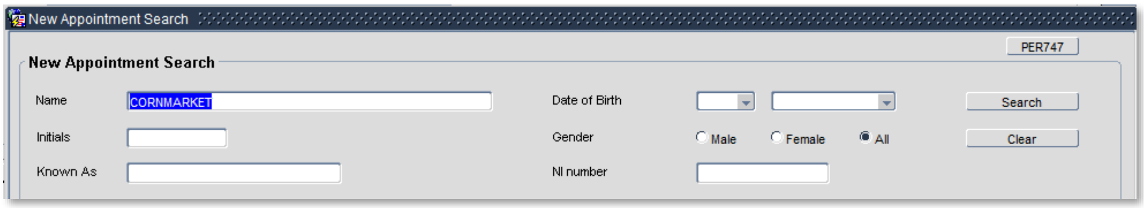
In the *Applicants/Posts* window:



a. Select the **Posts** tab and enter the **Post Number**.

b. Click Search .The system displays the relevant Post.

c. Click the Select button to the right of the post. The *New Appointment Search* window opens:



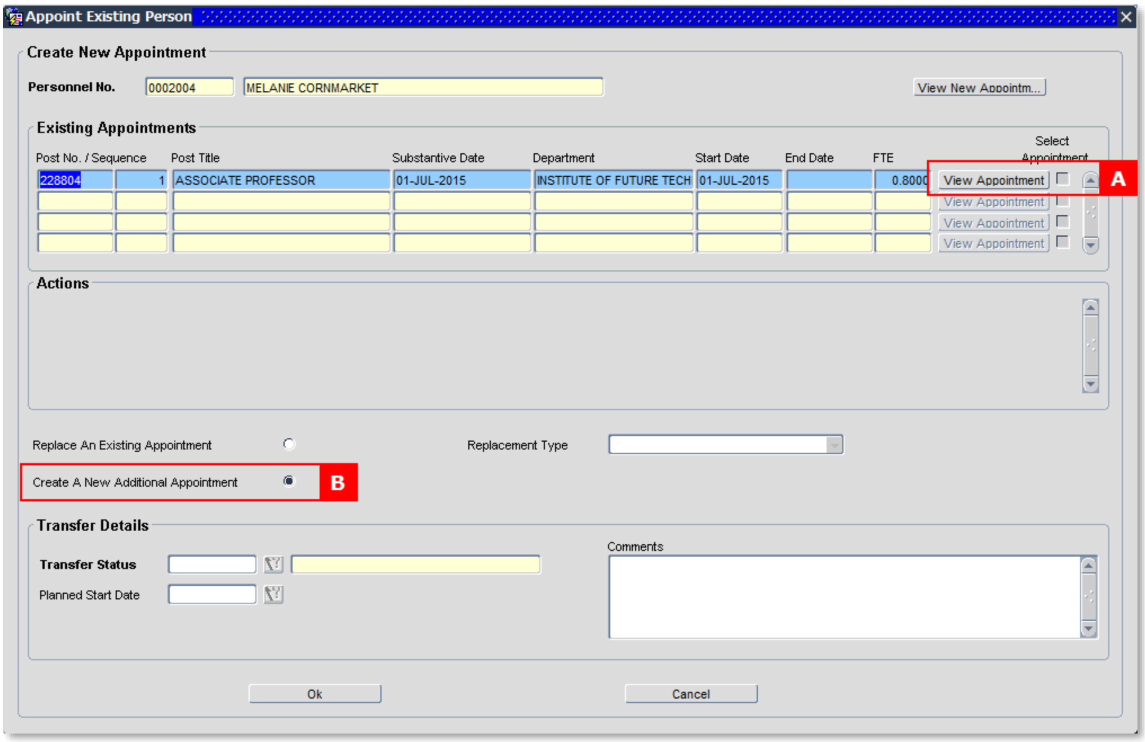
d. Use the Search criteria to locate the existing employee. Enter the employee's **Name**.

e. Click Search .

f. Locate the relevant employee in the list. Click the Select button to the right of the employee record. **Now go to Step 3**

> **Note:** If you are unable to locate the employee as expected please contact HRIS support as their record may have restricted access.

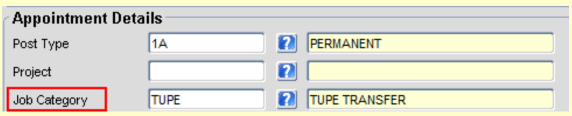
3. The Appoint Existing Person window opens:



Note: If the individual's existing post is **CASUAL** or **CASTCH** consider whether the existing casual appointment is still required. If it **is** (or if there is any doubt), follow this guide. If it is **not**, follow **QRG: PA2e_Appoint Transfer (new department)** or **QRG: PA2f_Appoint Transfer (same department)** as appropriate.

4. To view the current appointment, click **View Appointment [A]** to open the 'View current appointment' window.

Note: If the *Job Category* field contains **TUPE or HYBRID** do not proceed – contact Personnel Services for guidance.



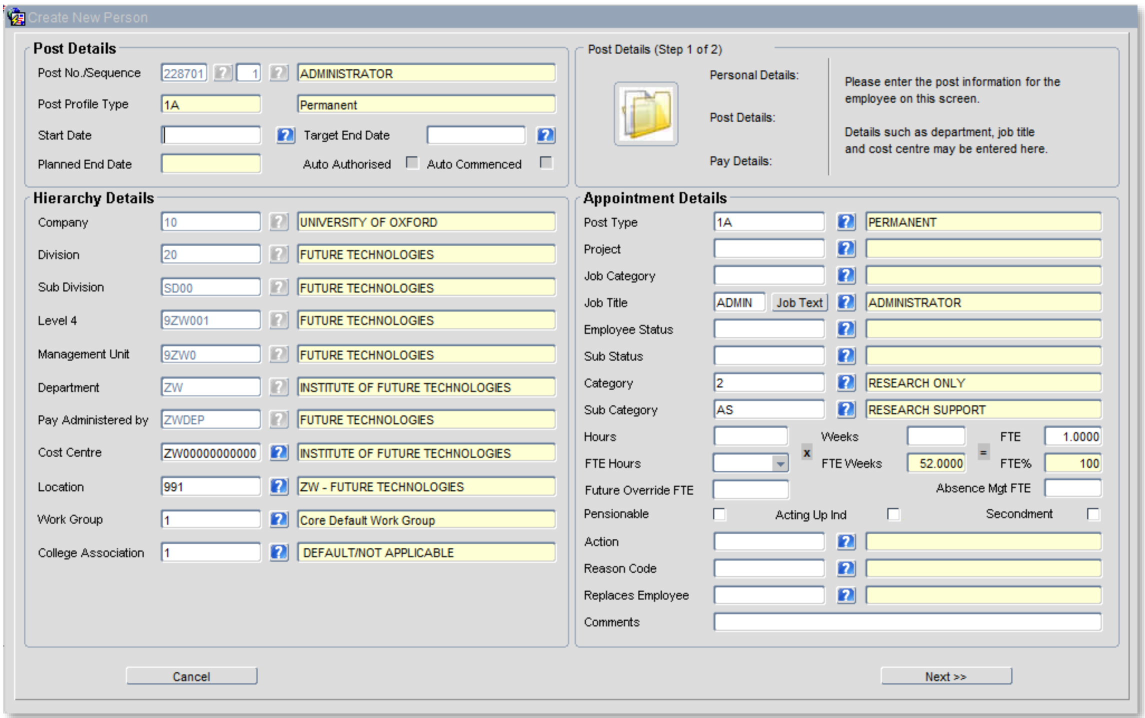
5. Click OK to close the appointment details.

6. Select the 'Create A New Additional Appointment' radio button [B].

7. Click OK

8. If this appointment will cause the total FTE for the employee to exceed 1 then a warning message will be displayed. **Note:** Consider if this is as expected, e.g., where the planned appointment is full time, but the actual appointment will be part time, before selecting Yes to continue.

9. Click OK. The *Post Details* window opens:



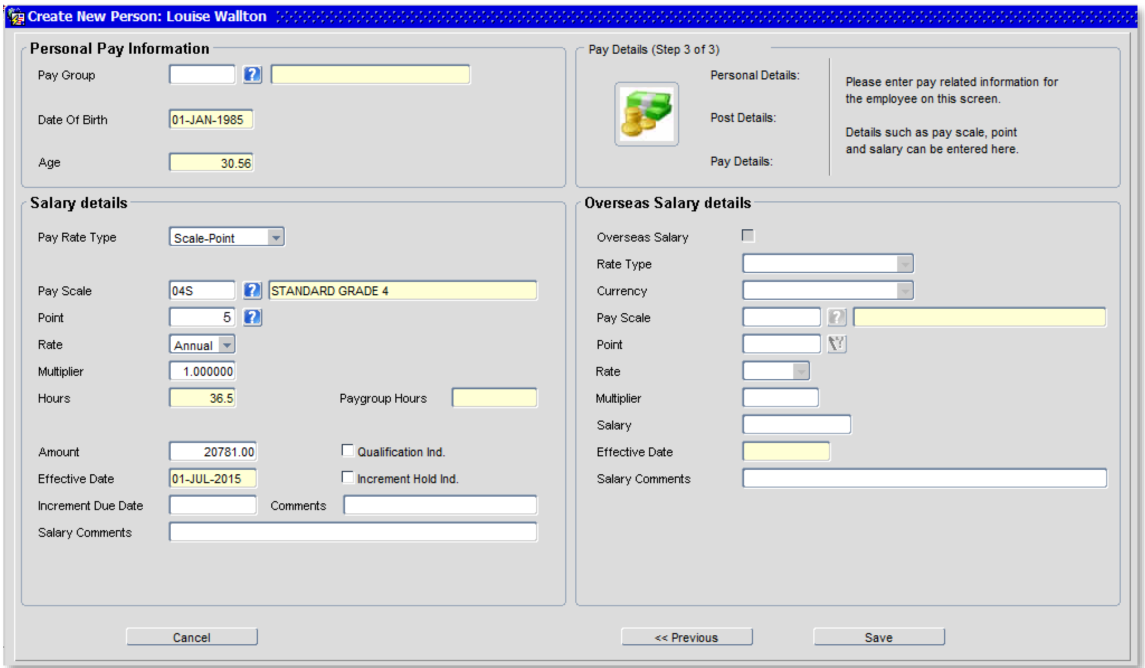
10. Check details are correct and update if required:

Field Name (* mandatory)	**Description**
Start Date *	Check this is still correct and update if necessary. **Note:** If the actual start date you wish to appoint from is earlier than the date shown, contact HRIS support to amend the start date of the post before proceeding with the appointment.
Target End Date *	Enter expected end date for fixed term posts.
Cost Centre *	Should be the departmental default. Format will be AA00000000000 where AA is the 2 digit department code. The coding string includes Activity followed by Source of Funds with no punctuation separators.
Work Group*	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 [HRIS Service Catalogue page.](#) **Note**: 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. **Note**: If at a later date you return to correct an error in the Work Group field, or if you are returning to assign a Work Group to a recent starter, follow the guidance in **QRG: IP6 Tracking Changes and Correcting Records Section E.** If however you return to record a genuine change to the employee’s

	Work Group, or to assign a Work Group to a starter who has had subsequent appointment changes, follow the guidance in **QRG: CH6 - Changes to appointment (no pay impact)**.
Project	Leave blank. You should not enter any information in this field on the appointment.
Job Category	Do not use.
Job Title *	Check/select this from the generic list.
Job Text *	Click the button and enter the actual job title (case sensitive). **Note:** the actual job title will appear in the template documents, such as the conditional offer/contract letter.
Employee Status *	Check/select relevant e.g. Permanent, Fixed term
Sub Status *	Select relevant, e.g. Full-Time, Part-Time, Term Time. **Note:** Refer to PA2c if Variable Hours Employee.
Category *	Indicates the role/categorisation of an academic contract. It relates to the contract of employment and the job description. Check/update if necessary. Please refer to the Staff Classification Guide on the staff classification section of the HR Information team website. **Note: This field is used for statutory reporting and is especially important for HESA and REF exercises.**
Sub Category *	Check/update if necessary. **It is important that the correct staff classification is selected.** Please refer to the Staff Classification Guide on the staff classification section of the HR Information team website. **This field must be completed to prevent failure of interfaces to other systems.**
Hours *	Enter actual hours to be worked. **Note**: if the employees aggregate FTE will exceed 1, a warning message will be displayed.
FTE Hours *	Select the relevant hours e.g. 37.5. **Note**: when you tab or click out of the hours field, the system will automatically update the FTE%.
FTE *	Check as expected and update Hours if necessary to correct.
FTE% *	Check as expected and update Hours if necessary to correct.
Weeks (term-time employees only)	Enter the number of weeks the employee works per year inclusive of holiday entitlement. E.g. if the employee works 38 weeks per year and is entitled to 4 weeks holiday, enter 42 weeks. NB: only applicable to term time employees who are paid the same amount each month.
FTE Weeks	This field will be set by the system to 52.

Action *	Select **New Appointment**.
Reason Code *	Select **New Additional Appointment**.

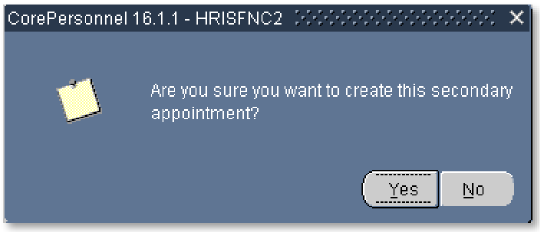
11. Click Next >>.



12. Check details are correct and update any of the following fields if required:

Field Name (* mandatory)	**Description**
Pay Group *	Check pay group is correct. **Note:** You cannot alter it at this point. Contact HRIS Support if it is incorrect.
Point *	Check/update the salary scale point as required.
Multiplier *	Check as expected. If it is not, click **Previous**, and correct **Hours/Weeks** as appropriate.
Increment Due Date *	Enter relevant date, in accordance with Personnel Services guidance. **Note:** This can be more than a year in the future.
Comments	Enter comments if required relevant to the increment due date.
Salary Comments *	Enter notes for the Approver/ Payroll, to re-iterate the type of appointment e.g. **additional appointment**.
Paygroup Hours	This value has no impact on pay and should be ignored.

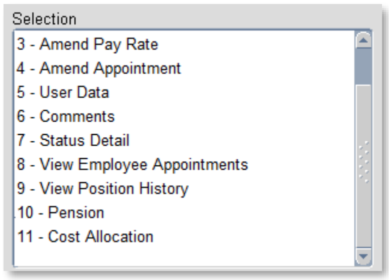
13. Click Save. A message will appear:



14. Click Yes. You are returned to the Appointment *Details window*.

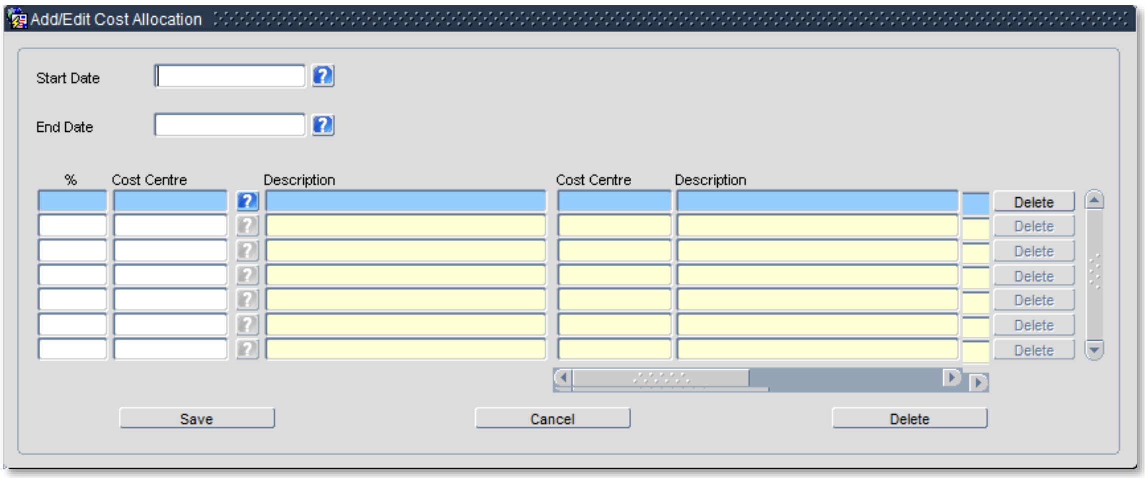
Allocate funding (Cost Allocations)

1. Click Appointment Details button – *Post Appt Maintenance* window opens:



2. Go to **Selection** > **Cost Allocation** – *Cost Allocations* window opens.

3. If there is already a cost allocation, click Edit to update if required. Alternatively, click Add Allocation button. The *Add/Edit Cost Allocation window* opens:



4. Complete details as below:

Field Name (* mandatory)	**Description**
Start Date *	Enter the start date for the new cost allocation (should be the same as the planned start date).
End Date *	Enter the end date if relevant.
% *	Enter **%**, e.g. 100, 50. **Note:** allocation may be split between more than one Cost Centre, but the total allocation must add up to 100%, even where the FTE is less than 1.

Cost Centre *	*(For each line entered)* If the salary is being paid from a project, select or enter 'CCPROJ'. If the salary is being paid from a GL cost centre, select/enter the relevant GL code in the format AA999999999 where AA is the 2 digit department code. *See row 1 in the example below*.
Project Code *	*(For each line entered)* If you have already entered a GL code, leave this field blank. If the salary is being paid from a project, select the relevant Project Code in the format AAXXXXXX.0000 where AA is the 2 digit department code. Take care to check the correct code has been selected. *See row 2 in the example below.*
Expense	Do not use

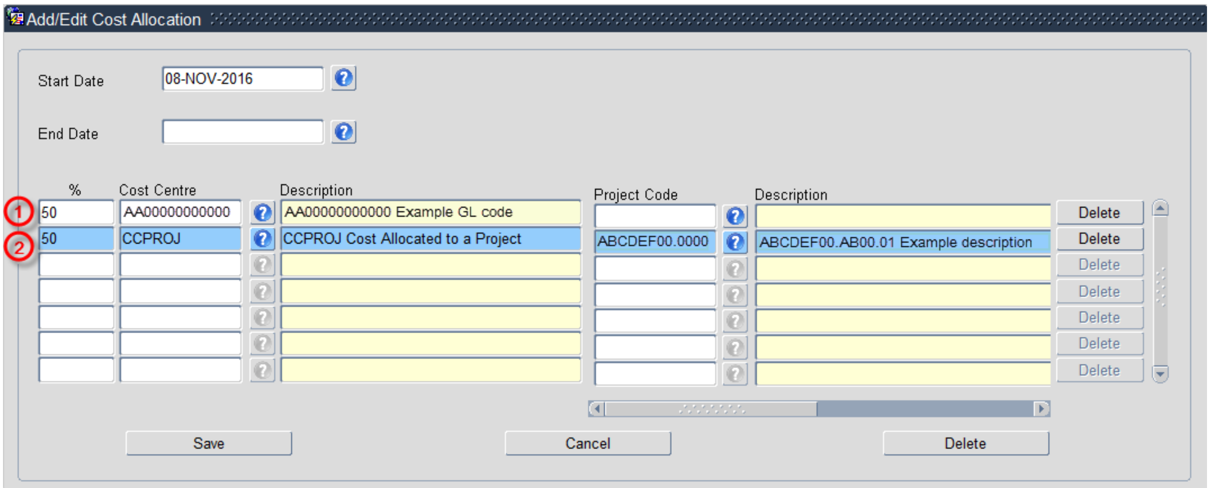
Notes:

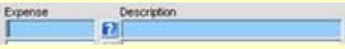
- You can type the cost centre straight in, but it must be in upper case.
- Always use the search function when entering a project code(s)
- When searching, the name/description is displayed in the first column in the search results; scroll right to view the codes.

Examples

If you have entered a GL code in the cost allocation screen it should look like row **1**.

If you have entered a project code in the cost allocation screen, it should look like row **2**.



NB: When you add a Project code and click on ok the screen jumps to an 'Expense' field 

. This field is not being used.
Use the scroll bar at the bottom of the screen to view the cost allocations you have recorded.

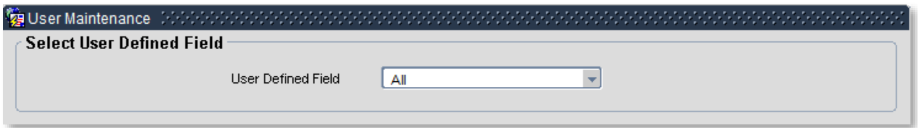
5. Click Save then OK . You are returned to the *Cost Allocations* window.

6. Click Close. You are returned to the *Post Appointment Maintenance* window.

Source of Funds

Where the cost centre code does not reflect the source of funds, additional information must be provided. This is important to be able to define the HESA source of funds.
E.g. where a suspense code is being used whilst awaiting a 'true' cost centre to be set up, or where a GL code is being used to administer externally funded appointments.

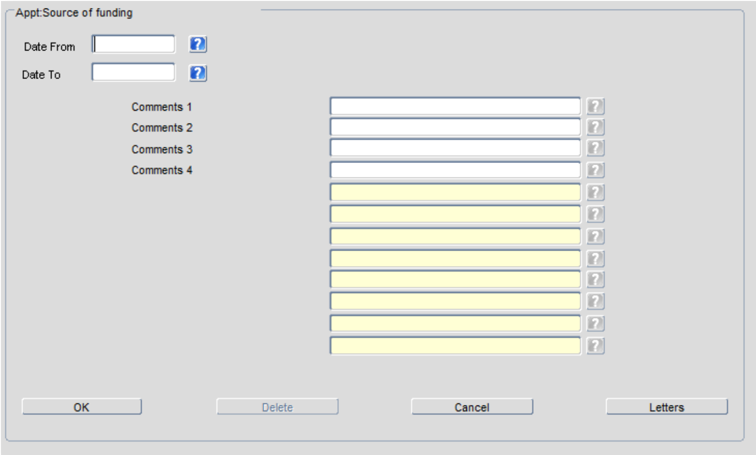
1. Go to **Selection** box > **User Data**. The *User Maintenance* window opens:



2. Click to display **User Defined Field** List of Values.

3. Select **Appt**: **Source of Funding**.

4. Click New.



5. Complete details as below:

Field Name (* mandatory)	**Description**
Date From*	Enter the **Date From**. This should be the appointment start date.
End Date	Leave blank
Comments 1 – 4	Enter as applicable

6. Enter the **Date From** **[A]**. This should be the appointment start date.

7. Enter additional information as required into **Comments** field(s).

8. Click  then  . You are returned to the *User Maintenance* window.

9. Click . You are returned to the *Post Appointment Maintenance* window.

Ending the previous/current record when adding a new UDF

Other important details must be checked/recorded if relevant, including:

- Academic title – refer to - **QRG IP12 – Academic title**
- Right to Work – refer to - **QRG PA10 – Maintaining Right to Work data**

Follow steps in the relevant QRG for guidance on ending the current/previous record and adding a new entry if required.

NEXT STEPS:

1. Refer to the **New Starter Checklist** and **QRG: PANS0 Pre arrival and new starter guide - section E** onwards for guidance.

2. All direct appointees (i.e. those who have not come through e-recruitment) must complete a paper **Equality and Diversity** form. Refer to the last section of **QRG: PA2g_Direct Appoint** for guidance on generating the form.