

PA2c - Appointing 'variable hours' employees

This guide shows how to appoint an individual to a Variable Hours Employee post.

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.

What's changed?

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

September 18



Note: For rehires and transfers you should refer to the relevant guides: **QRG: PA2d_ Appoint Rehire** or **QRG: PA2e_ Appoint Transfer (new department)**, but following the specific variable hours guidance in this document for *Sub Status, Hours, FTE, Multiplier* and *Salary comments*.



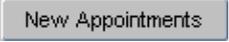
Note: If the employee will be working abroad please also refer to **QRG: PA5_Working abroad**

This guide covers the following process steps:

2.1 Via e-Recruitment	1
2.2 Not via e-Recruitment	2
Allocate funding (Cost Allocations)	8
Source of Funds	10

Navigate to: Personnel > Maintenance > Personal Profile

The *Employee Search* window opens:

1. Click the  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 eRecruitment.
Section 2.2: If your employee is a 'direct appoint' (i.e. not via eRecruitment).

2. Locating the applicant or post

2.1 Via e-Recruitment

- a. In 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.

PA2c - Appointing 'variable hours' employees

- b. Click the  button to the right of the relevant Applicant. The *New Appointment Search* window opens. **Now go to step 3** 

2.2 Not via e-Recruitment

- a. Select the **Posts** tab and enter the **Post Number**, or locate the relevant **Post/sequence** in the list.



NOTE: It is very important to ensure you use the correct post and sequence number notified to you by the Reward Team via the system notification email.

- b. Click the  button to the right of the Post. The *New Appointment Search* window opens. **Now go to Step 3** 
3. Use the Search criteria to ensure the individual does not already have a Personnel record. Enter the individuals Name (**Surname** followed by first initial), **NI number** and/or **Date of Birth** to search on. Click .



Note: It is important to search as thoroughly as possible with the available information to ensure you do not create a duplicate record. If you later find a duplicate record has been created please notify HRIS Support.

4. An individual new to the University SHOULD NOT exist in the database. The search results list will remain blank.



Note: If the individual is found they should be appointed as an Additional Appointment or Rehire as appropriate. Refer to one of the following QRGs:

- ♦ **QRG: PA2b_Additional Appointments**
- ♦ **QRG: PA2d_Appoint Rehire.**

If you expect to find the individual, but are unable to locate them 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.

5. Assuming the individual does not have a previous history with the University, click . The 3-step 'New Person Record Wizard' opens:

PA2c - Appointing 'variable hours' employees

6. Complete/check the fields as below:

Field Name (* mandatory)	Description
Forename *	Check/enter first name in full. E.g. Robert not Bob.
Surname *	Enter/check surname.
Middle Name	Enter all middle names in full.
Known As *	Enter first name only. Can be shortened if preferred. This will be used to generate the work email address.
Title*	Select from drop-down list.
Initials *	Enter initials for forename and middle names.
Qualification	Field not in use.
Country*	Select from the LoV  in ALL cases including UK. NB: even though this field is shaded yellow it must be updated for HMRC (RTI) purposes.
Address *	Enter/check full address details. NB1: If the address is outside the UK you must also enter the country in the last line of the address to ensure any correspondence is addressed correctly. NB2: it is essential that the address is completed in full as soon as possible as it is needed by the Pension team who have very strict timescales to work to.
Post Code *	Enter/check it is entered across both fields in alpha numeric format as shown AA1(1) (1)1AA.

PA2c - Appointing 'variable hours' employees

Phone No. *		Enter/check phone number. NB: this field should contain one phone number only. Additional phone numbers must be added via 'contact details'.
Nationality		Field not in use.
Gender *		Select as appropriate.
Date of Birth *		Complete using the format DD-MMM-YYYY.
Retirement Date *		Please ignore this field. System calculated, but not compliant with recent legislative changes.
Marital Status		Field not in use.
Date of Marriage		Field not in use.
Previous Surname		Field not in use.
NI Number *		Enter when known, either now or when individual starts.
Health Insurance Name/No.		Field not in use.
File Complete		Field not in use.

7. Click .

The screenshot shows the 'Create New Person' form with the following sections:

- Post Details:** Post No./Sequence (228701), Post Profile Type (1A), Start Date, Target End Date, Planned End Date, Auto Authorised, Auto 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 (1 - Core Default Work Group), College Association (1 - DEFAULT/NOT APPLICABLE).
- Appointment Details:** Post Type (1A - PERMANENT), Project, Job Category, Job Title (ADMIN - Job Text - ADMINISTRATOR), Employee Status, Sub Status, Category (2 - RESEARCH ONLY), Sub Category (AS - RESEARCH SUPPORT), Hours, Weeks, FTE (1.0000), FTE Hours, FTE Weeks (52.0000), FTE% (100), Future Override FTE, Absence Mgt FTE, Pensionable, Acting Up Ind, Secondment, Action, Reason Code, Replaces Employee, Comments.

Buttons: Cancel, Next >>

PA2c - Appointing 'variable hours' employees

8. Complete the fields as below:

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 AA000000000000 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 *	Select as required, e.g. Permanent, Fixed term.
Sub Status *	Ensure Variable Hours is selected.

PA2c - Appointing 'variable hours' employees

<p>Category *</p> 	<p>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.</p> <p>Note: This field is used for statutory reporting and is especially important for HESA and REF exercises.</p>
<p>Sub Category *</p>	<p>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.</p> <p>This field must be completed to prevent failure of interfaces to other systems.</p>
<p>Hours *</p>	<p>Enter hours as 0.</p>
<p>FTE Hours *</p>	<p>Select the relevant hours e.g. 37.5.</p>
<p>FTE *</p>	<p>Enter 0.</p>
<p>FTE% *</p>	<p>Check as expected and update FTE if necessary to correct.</p>
<p>Weeks (term-time employees only)</p>	<p>Leave blank</p>
<p>FTE Weeks</p>	<p>This field will be set by the system to 52.</p>
<p>Action *</p>	<p>Select New Appointment.</p>
<p>Reason Code *</p>	<p>Select one of the following as applicable: New Starter – New to University, New Additional Appointment or New Appointment – Ex employee</p>

9. Click .

PA2c - Appointing 'variable hours' employees

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

Field Name (* mandatory)	Description
Pay Group *	Select Monthly (20) or Senior (21) as appropriate. NB: Senior Pay Group is for the following grades only: Professor (A20) Clinical Professor – old consultant contract (A70) Clinical Professor – new consultant contract (A80) Senior Administrative Officer - ALC6 (B23) Clinical Reader/University Lecturer (A82) Royal Society Professor (D94) Marie Curie Fellow (MCF)
Point *	Check/update the salary scale point as required.
Multiplier *	Ensure this is 0 . Pay for variable hours staff is calculated separately.
Increment Due Date *	Enter relevant date, in accordance with Personnel Services guidance.
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., Variable Hourly rate £nn (if known).
Paygroup Hours 	This value has no impact on pay and should be ignored.

11. Click .

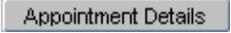
PA2c - Appointing 'variable hours' employees

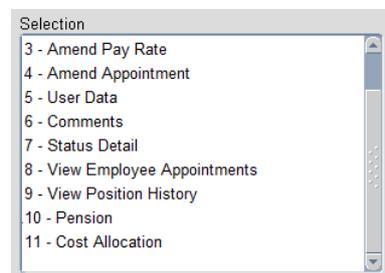


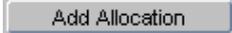
You should make a note of the Personnel Number for your future reference.

- Click . You are returned to the *Appointment Details window*.

Allocate funding (Cost Allocations)

- Click  button – *Post Appt Maintenance window* opens.
- Go to **Selection > Cost Allocation** – *Cost Allocations window* opens.



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

- 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.

PA2c - Appointing 'variable hours' employees

Cost Centre * 	<p><i>(For each line entered)</i> If the salary is being paid from a project, select or enter 'CCPROJ'.</p> <p>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.</p>
Project Code *	<p><i>(For each line entered)</i> If you have already entered a GL code, leave this field blank.</p> <p>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.</p>
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

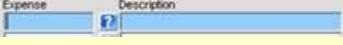
If you have entered a GL code in the cost allocation screen it should look like row **1**.

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

%	Cost Centre	Description	Project Code	Description	Delete	
1	50	AA0000000000	AA0000000000	Example GL code	Delete	
2	50	CCPROJ	CCPROJ Cost Allocated to a Project	ABCDEF00.0000	ABCDEF00.AB00.01 Example description	Delete
					Delete	
					Delete	
					Delete	
					Delete	
					Delete	

PA2c - Appointing 'variable hours' employees



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  then . You are returned to the *Cost Allocations* window.
6. Click . You are returned to the *Post Appointment Maintenance* window.

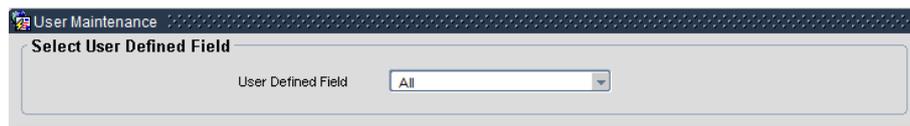


Where the cost centre code does not reflect the source of funds, additional information must be provided. This is important to be able to then define the HESA source of funds.

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.

Source of Funds

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 .

PA2c - Appointing 'variable hours' employees

Field Name (* mandatory)	Description
Date From*	Enter the start date of the appointment.
Date To	Leave blank
Comments 1 – 4	Enter details as applicable

- Click then . You are returned to the *User Maintenance* window.
- Click . You are returned to the *Post Appointment Maintenance* window. Exit all windows back to the Personnel main screen.

NEXT STEPS:

- Refer to the **New Starter Checklist** and **PANS0 Pre Arrival and New Starter Guide** for guidance.
- All direct appointees (i.e. those which have not come through e-recruitment) must complete a paper **Equality and Diversity** form. Refer to **QRG: PA2g_Direct Appoint** for guidance on generation of the form.