PA2h - Setting up a non-employee (including agency workers)

This guide shows how to set up the record for a non-employee such as a contractor, agency worker, etc. Departments can generally choose whether or not a non-employee needs a record to be set-up, **with the exception of agency workers who, to comply with employment law, must be set-up in CoreHR as non-employees**.

What's changed?
Updated guidance on address to be entered when creating a new starter. ***Jul 19***

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: Refer to new guide **QRG: PA2q_Set up a Non-Employee (Visiting Academic or Student)** for specific guidance on visitors.

This set up can be done on the day the individual arrives. Unlike appointing an employee, it does not have to be done in advance.

Note: Before setting up an **agency worker** it is important to check with the agency that they have not recently carried out a similar role elsewhere in the University. If they have, this may need to be taken account of when calculating 12 weeks service. Refer to Personnel Services for guidance.

Navigate to: Personnel > Maintenance > Personal Profile

The Employee Search window opens.

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

2. Select the **Posts** tab.

3. Locate the relevant *bucket post* in the **Post** list.

For agency workers select **AGENCY**.
For all other non-employees select **NONEMP**.

4. Click the Select button to the right of the Post. The *New Appointment Search window* opens.

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If multiple posts exist ensure you select the post with the status *'Auto Commenced' not 'Auto Commenced (approved)'.*

Appointment Status	Department	Post FTE	Active Fte	Active Appointments	
Auto Commenced		0.00	6.90	226	Select
Auto Commenced: (Approved)		0.00	6.90	226	Select

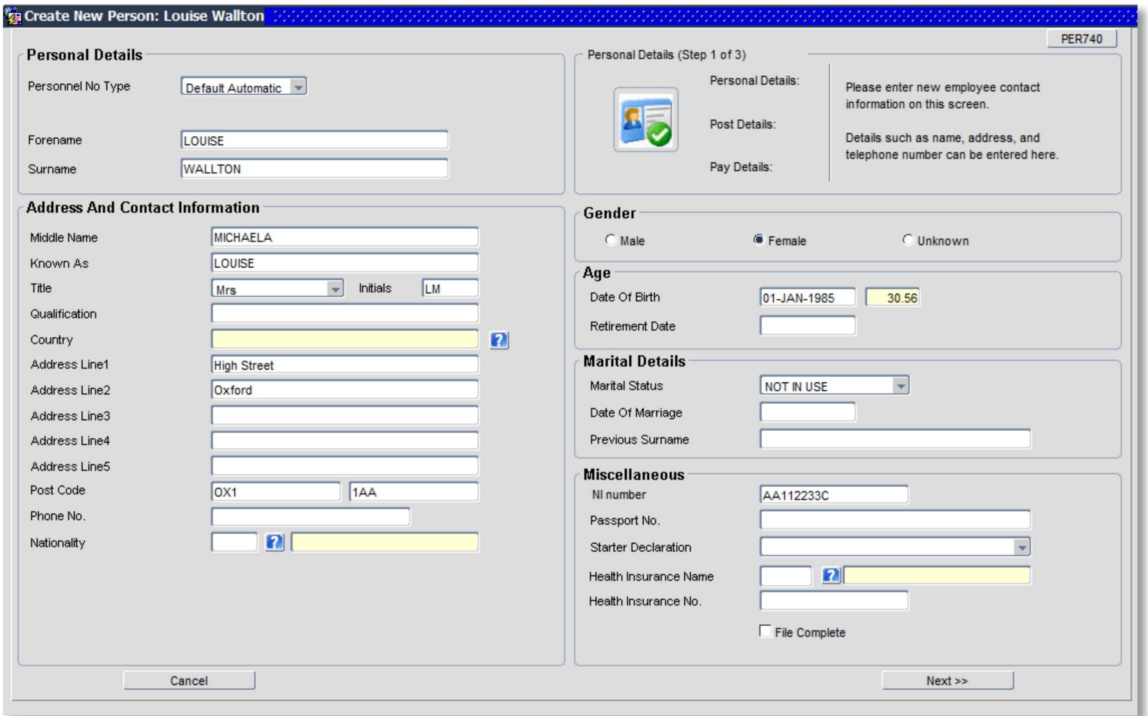
5. Use the Search criteria to ensure the individual does not already have a record. Enter the individuals Name (**Surname** followed by first initial)**, NI number** and/or **Date of Birth** to search on. Click Search .

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.

6. 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 a **Rehire** (refer to **QRG: PA2d_Appoint Rehire)** or **QRG: PA2b_Additional Appointment** as relevant - but remember to complete the specific appointment details as per the guidance on page 3/4 of this guide.
Check also if the pay group needs to be updated by the HRIS Support team.
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.

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



8. Complete 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.
Title *	Select from drop-down list.
Initials *	Enter initials for forename and middle names only.
Qualification	Field not in use.
Address *	Enter the agency name and address.
Post Code *	Enter post code, using both fields.
Phone No. *	Enter/check phone number. **NB**: this field should contain **one** phone number only. Additional phone numbers must be added via 'contact details'.
Country *	Select from drop-down list.
Nationality	Field not in use.
Gender *	Select as appropriate.
Date of Birth *	Must be completed for agency workers, using the format: DD-MMM-YYYY
Retirement Date	Please ignore this field. Calculated by the system, if date of birth entered, 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 *	Must be completed for agency workers at this stage.
Health Insurance Name/No.	Field not in use.
File Complete	Field not in use.

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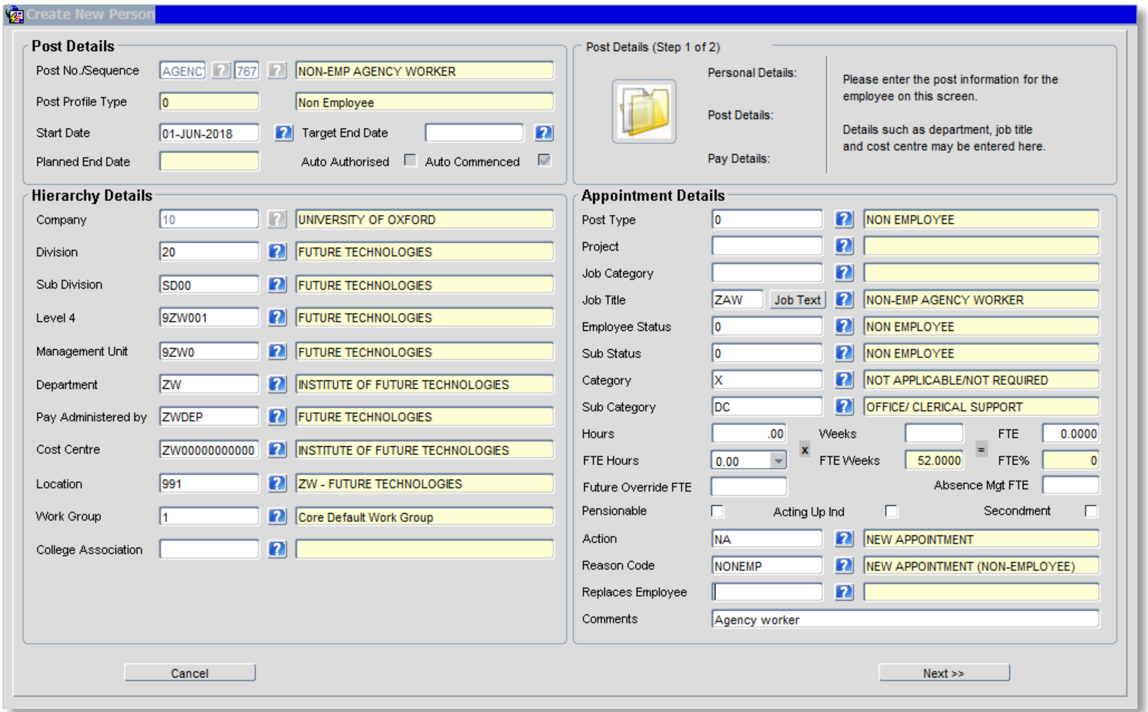
9. Click Next >>.

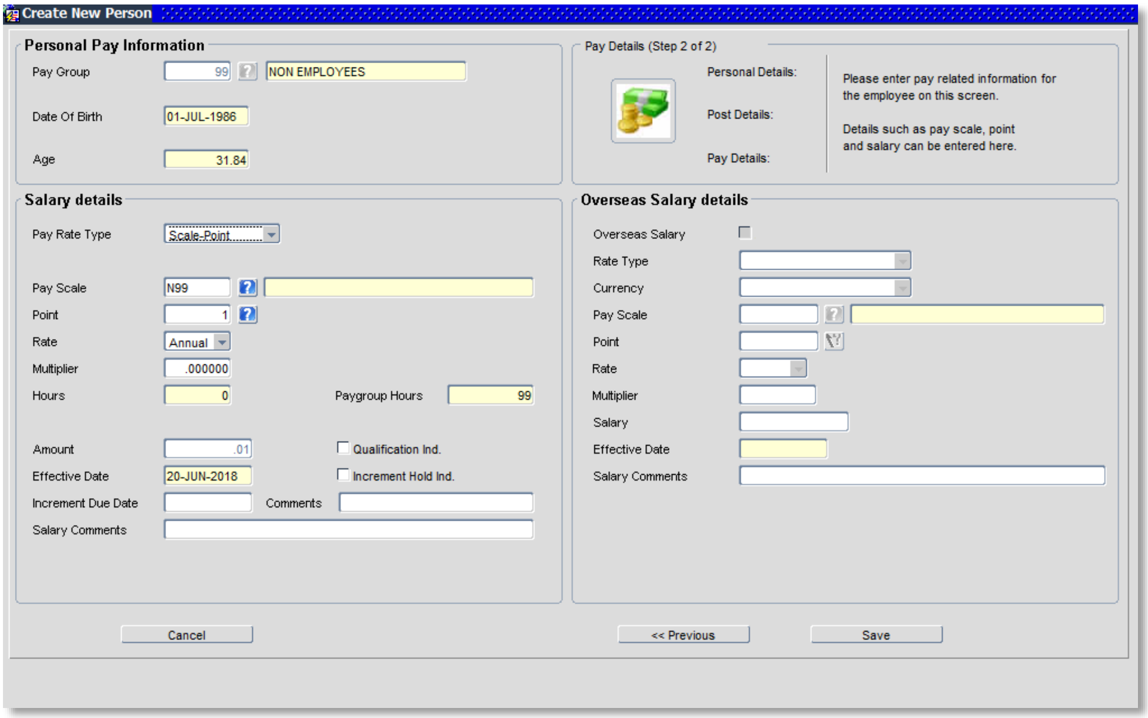


10. Complete the fields as below:

Field Name (* mandatory)	**Description**
Start Date *	Enter agreed start date.
Target End Date	Enter if applicable.
Company thru to **Pay Administered by**	Enter all hierarchy details as appropriate.
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	Not required. Leave as 'Core Default Work Group'.
Project	Leave blank. You should not enter any information in this field on the appointment.
Job Category	Do not use.
Job Title *	Pre-populated with Non-Employee or Agency Worker as appropriate. Should be changed to actual job title.
Job Text	Click the button and enter the actual job title (case sensitive), if required.
Employee Status *	Select **Non-employee**.
Sub Status *	Select **Non-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 Analytics team website]().
Sub Category *	Select relevant option. **It is important that the correct staff classification is selected for agency workers.** Full guidance notes can be found on the [HR Analytics team website]() **This field must be completed to prevent failure of interfaces to other systems.**
Hours *	Enter, e.g. 0.
FTE Hours *	Enter **0**.
FTE *	Enter **0**.
FTE% *	Should be 0%.
Action *	Select **New Appointment**
Reason Code *	Select **New Appointment (Non-employee)**

11. Click Next >>.



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

Field Name (* mandatory)	**Description**
Pay Group *	Select **99 Non Employees**. **Note**: If you are rehiring the individual and the current paygroup is 20 or 21 this cannot be changed.
Pay Scale	Ensure this is set to N99.
Point *	Should be set to 1. Do not change.
Multiplier *	Should be **0** so no salary is generated.
Increment Due Date	Not required.
Salary Comments *	Enter any notes for the Salary Approver and Payroll, e.g. to confirm they are a non-employee with no pay.
Paygroup Hours	This value has no impact on pay and should be ignored.

13. Click Save.

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

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

Note: The system auto-commences the individual, so you do not need to go through the Commence process in Core.

The auto-commence process will generate a zero value salary line for approval.
It is important that this is approved to avoid issues for Payroll.

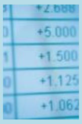
15. If you have Salary Approval access and it is appropriate to do so you can approve the zero salary straight away.

16. Exit all windows back to the Personnel main screen.

NEXT STEPS: Unless you were able to approve the zero salary it will now appear in your approver's list for approval. Approvers should refer to **QRG: FD5_Approve (or Reject) Salary/ Allowances** for guidance on approving.

Remember you should also carry out the relevant right to work checks (excluding agency workers).

No further actions are required for non-employees until an agency worker has been working for 12 weeks. Refer to **QRG: CH19_Change: Agency Workers at 12 Weeks** for details. Follow **QRG: EA1_End Appointments** for details on closing the record of a non-employee.



Useful Reports
To help track agency worker appointments don't forget to regularly run: PERDEP06_Agency Workers.