PA2k - Marie Curie students

HRIS SUPPORT CENTRE

What's changed?
Screenshots replaced and table updated following the implementation of Self-Service.
September 18

Marie Curie students are classed as non-employees. They receive a Student Living Allowance and may also be entitled to other Marie Curie allowances. The grants for these students are usually awarded to a network of Universities. In some cases Oxford will conduct the recruitment exercise and sometimes the student will be recruited by another university and then appointed by Oxford.

This guide, therefore, caters for appointing students who have come through e-Recruitment, as well as appointing a student as a direct appointment. Please ensure you follow the correct sections of the guide for your circumstances.

Note: It is advisable to check **QRG: PA2p_Request & Appoint: Marie Curie Fellows and Researchers** and the **People Profiles Matrix** before following the guidance below, to ensure Marie Curie 'Student' is the correct categorisation for the individual involved.

This guide covers the following process steps:

Requesting the post and appointment (and vacancy where required)

As this staff group are non-employees you should not use the staff request process to request a post for them. Instead email the HRIS Support Centre with the details listed below and they will create the post and planned appointment for you. Where required, they will also create a vacancy:

Required information when requesting a new post for a Marie Curie Student (to be included in your e-mail request to the HRIS Support Centre):

- Expected Start Date
- Expected End Date
- Department
- Pay Administered by (usually the department)
- Location
- Default cost centre for the department (cost allocations can be added later)
- Hours to be worked
- Whether a vacancy is required

Once the post and planned appointment have been created you will receive email notification with details of the Post Number (and if applicable the vacancy ID).
If you have requested a vacancy and are ready to commence your recruitment exercise, refer to **QRG: REC01_Creating a Vacancy (e-Rec and Personnel),** section 1.2 onwards. Once you have identified your successful candidate from the recruitment process, follow the appointing steps detailed in this guide.

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.

Navigate to: Personnel > Maintenance > Personal Profile

The Employee Search window *opens:*

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

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

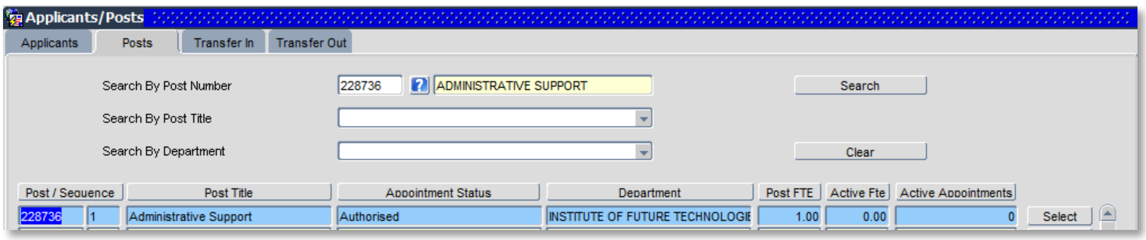
2.1 Via e-Recruitment

2.1.1. 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.

2.1.2. Click the Select 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

2.2.1. Select the **Posts** tab.



2.2.2. Enter the **Post Number** or locate the relevant post/sequence in the list.
Click Search .The system displays the relevant Post.

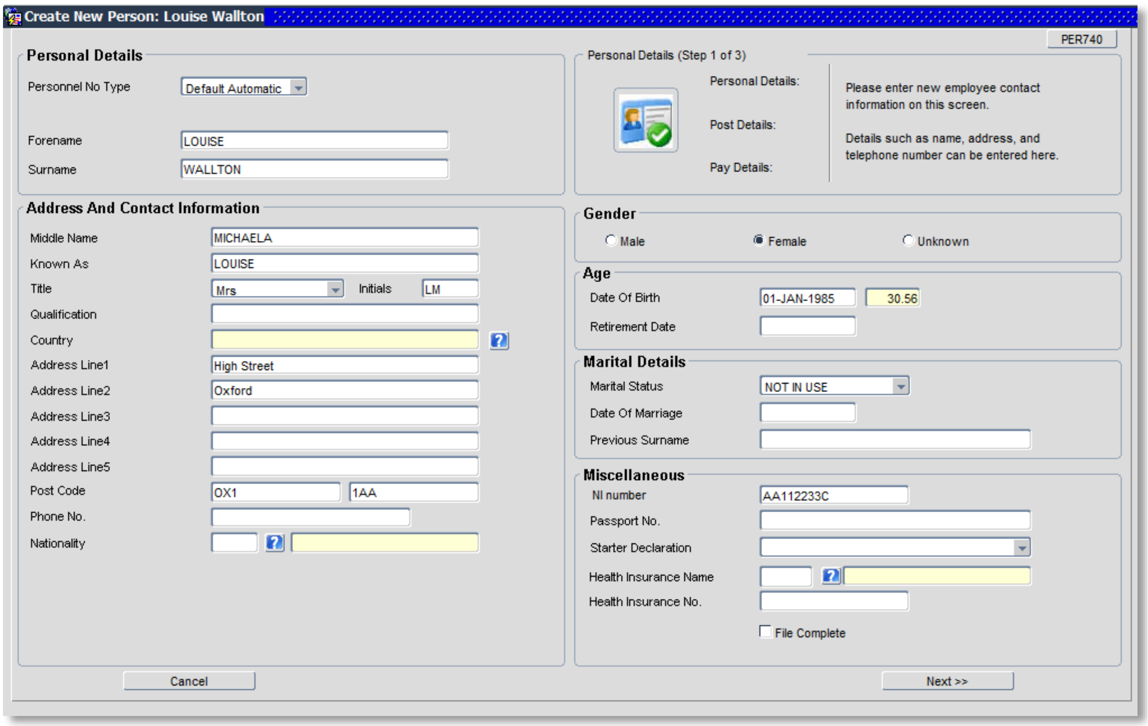
2.2.3. Click the Select button (to the right). The *New Appointment Search* window opens.

2. Use the Search criteria to see if the individual already has a Personnel record. Enter the individuals **Surname, NI number** or **Date of Birth** to search on. Click Search.

3. 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:
>
> - **PA2b_Additional Appointment**
> - **PA2d_Appoint Rehire**
>
> **but** remember to complete the specific appointment details as per the guidance on pages 5 and 6 of this guide.
>
> Check also if the pay group needs to be updated by the HRIS Support Centre.
>
> If you expected to find the individual but were unable to locate them as expected please contact the HRIS Support Centre before proceeding.

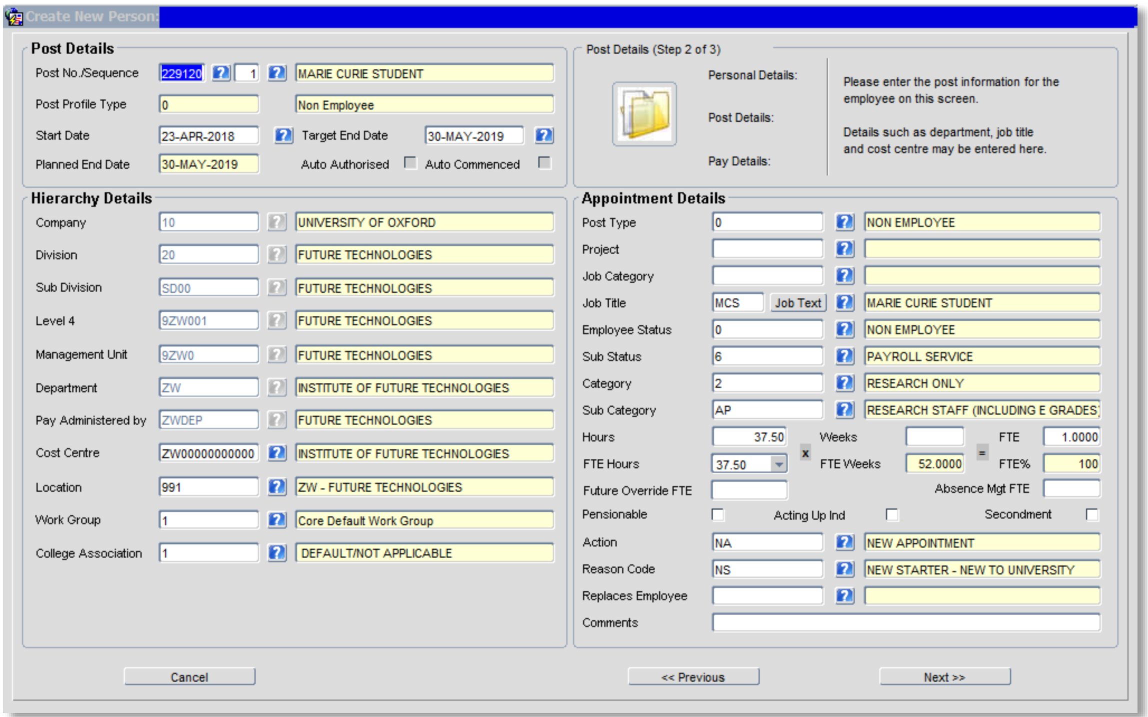
4. Assuming the individual does not have a previous history with the University, click Create New Starter. The 3-step 'New Person Record Wizard' opens:



5. 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. 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.
Address *	Enter/check full address details.
Post Code *	Enter/check post code - should be 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 *	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.

6. Click Next >>.

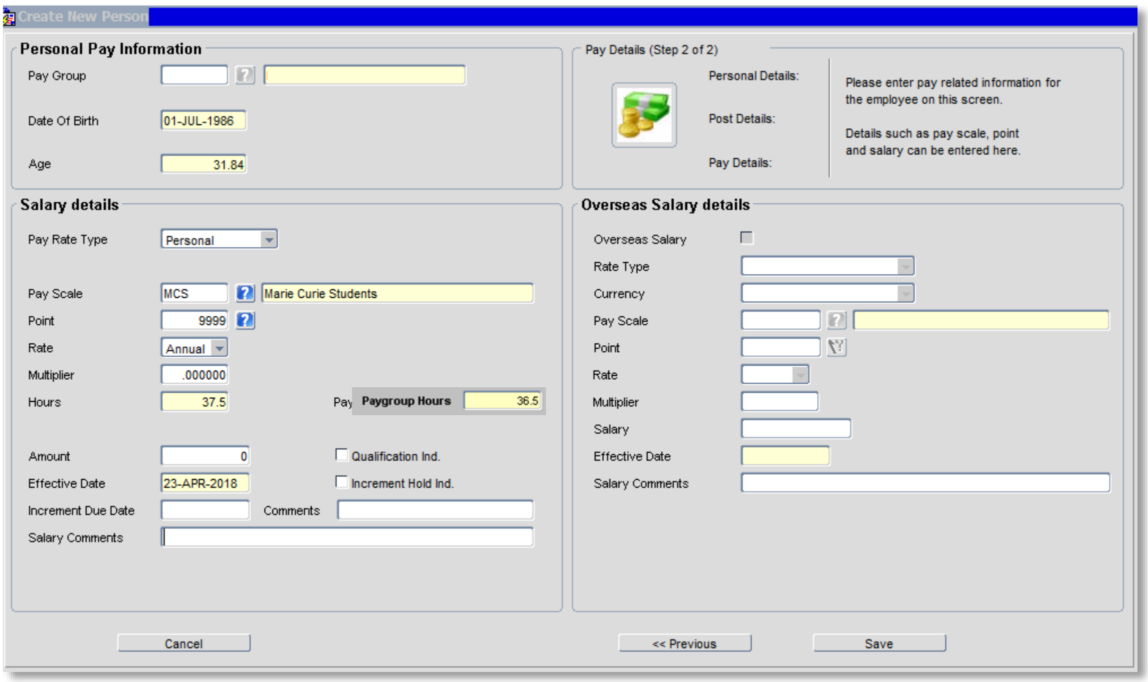


7. Complete the fields as below:

Field Name (* mandatory)	**Description**
Start Date *	Enter agreed start date.
Target End Date *	Enter if applicable e.g. for fixed term post.
Post Type	Should be **Non-employee**.
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 *	Should be **Marie Curie Student**.
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 **Non-employee**.
Sub Status *	Select **Payroll Service**. This reflects that even though they are a non-employee we will be using the main payroll to disburse their allowances.
Category *	Select **Research only.**
Sub Category *	Select **Research Staff (including E grades).**
Hours *	Enter normal working hours e.g. 37.5
FTE Hours *	Enter **FTE hours e.g. 37.5**
FTE *	Will be calculated by the system, ensure it is correct and adjust hours accordingly.
FTE% *	Will be calculated by the system.
Action *	Select **New Appointment**.
Reason Code *	Select **New Starter – New to University**

8. Click Next >>.



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

Field Name (* mandatory)	**Description**
Pay Group *	Select **Monthly**
Pay Rate Type	Select **Personal**
Pay Scale	Select **MCS**
Amount	Enter 0
Multiplier *	Set to **0** so no salary is generated.
Increment Due Date *	Not used
Comments	Enter comments if required, e.g. no increment due date.
Salary Comments *	Enter notes for the Approver/ Payroll, e.g. **Marie Curie Student**.
Paygroup Hours	This value has no impact on pay and should be ignored.

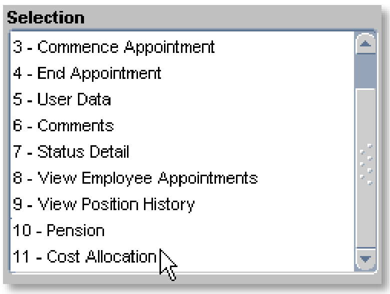
10. Click Save. **Note:** You should make a note of the Personnel Number for your future reference.

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

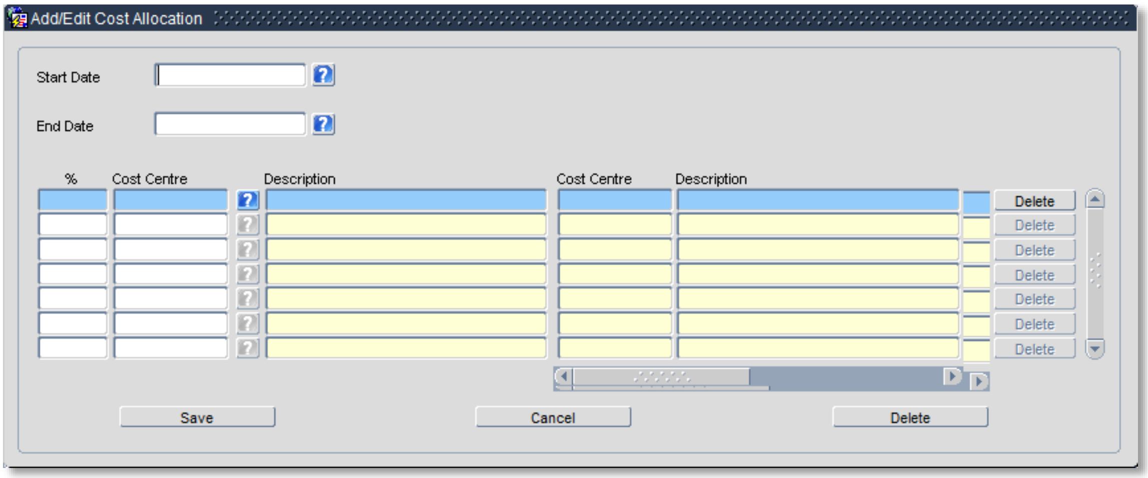
Allocate funding (Cost Allocations)

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

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



3. Click Add Allocation button. The *Add/Edit Cost Allocation* window opens:



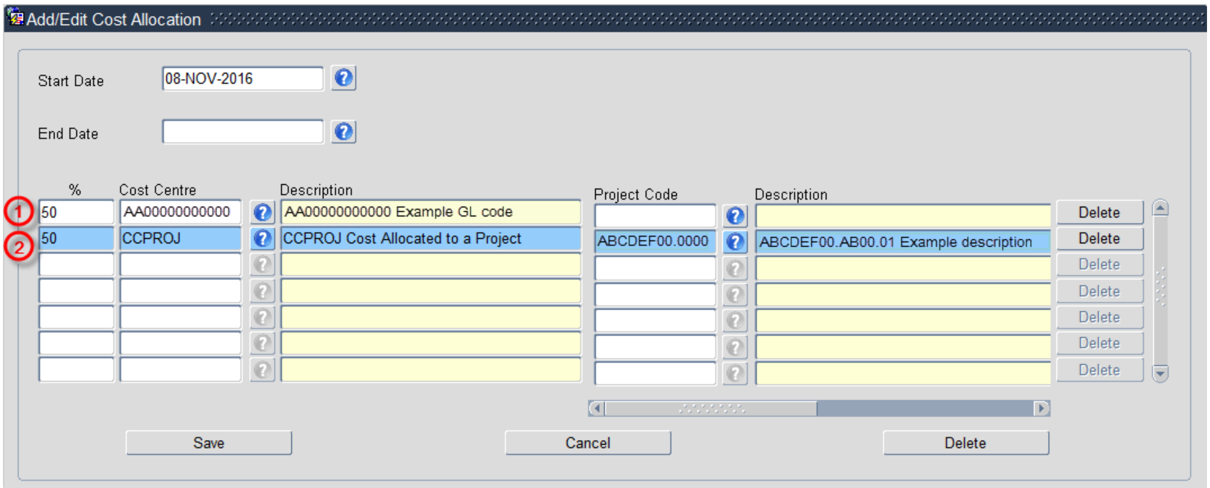
4. Complete details as below.

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

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

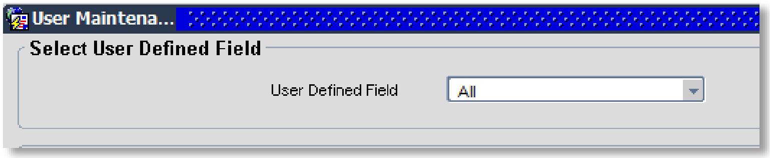
5. Click [Save] then [OK] . You are returned to the *Cost Allocations* window.

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 for PRAS 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.

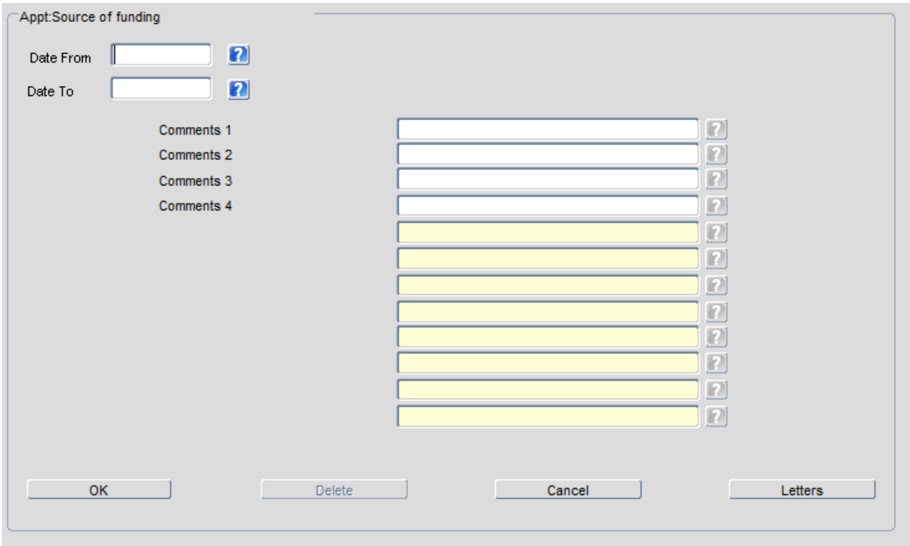
1. Go to **Selection** box > **User Data**. The *User Maintenance* window opens.



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

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

4. Click New.



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

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

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

Commence employee (first day)

As a final stage before the new starter is set up on payroll, it is necessary to 'commence' their appointment within Core Personnel. You will need to complete this step in order to set up their monthly allowance(s).

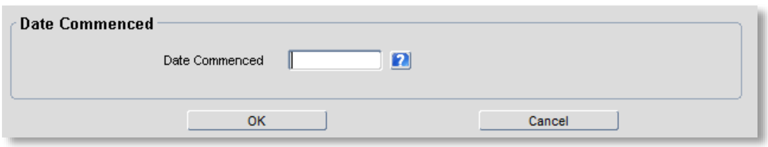
NOTE: Commencement should normally happen on or as soon as possible after the new starter's first day, but future commencement is possible if all details are complete. Currently this can only be done for new employees starting within the current payroll month.

Navigate to: Personnel > Maintenance > Personal Profile

1. Search for and open the employee record and go to **Select Detail** box > **Appointment Details**.

2. Click into the **Post Number** to ensure the correct appointment is highlighted. Click the Appointment Details button. The *Post Appointment Maintenance* window opens.

3. Go to Selection box > Commence Appointment.



4. Select (or type) the actual start date into **Date Commenced**.

5. Click OK. Click then OK.

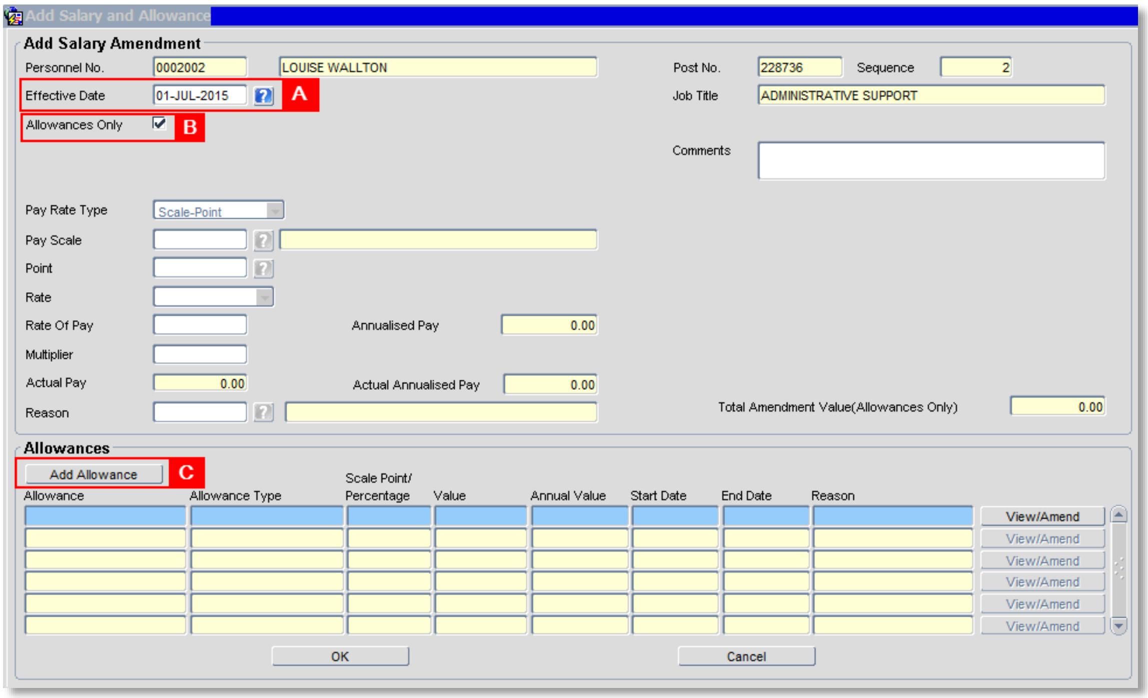
Note: If the salary has not been set up correctly refer to **QRG: CH5_Change: Pay** for guidance.

Set up of Allowances

Marie Curie students are paid a Student Living Allowance. They may also be entitled to other Marie Curie allowances.

1. From *Post Appointment Maintenance* screen go to **Selection > Amend Pay Rate**.

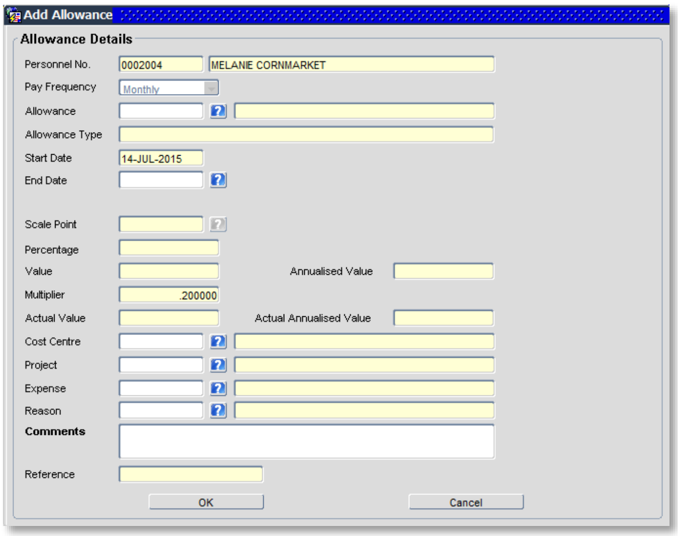
2. The Add Salary and Allowance window opens:



3. To set up a new allowance, set the **Effective Date [A]** to the date the new allowance is to be paid from.

4. Click the checkbox **Allowances Only [B]**.

5. Click the Add Allowance button **[C]**. The *Add Allowance* window opens:



6. Complete the *Allowance Details* screen as below:

Field Name (* mandatory)	**Description**
Allowance *	Select **MC Student Living Allowance**.
Start Date *	Check the start date was entered correctly - effective date entered earlier.
End Date *	Enter the end date if required. **Note**: If the end date is left blank, payment will be paid continually.
Scale Point	Not applicable.
Percentage	Not applicable.
Value	Enter the value of the allowance, eg 200 for a £200 per month allowance. Press tab - the system will automatically calculate the annualised value. **Note:** Most allowances are paid in full, i.e. the amount entered will not be prorated to take account of FTE, ensure value entered takes account of FTE.
Cost Centre *	Select or enter (case sensitive) the relevant GL code. Format will be AA999999999 where AA is the 2 digit department code. The coding string includes Activity followed by Source of Funds with no punctuation separators. OR Select or enter 'CCPROJ' if it is going to be funded by a project or grant. **Note:** Costing information needs to be specified here ONLY if the funding for the allowance is from a different cost allocation to the funding for this appointment.
Project *	Either leave blank if a GL cost centre has been selected. OR Select the relevant Project Code (Task/Sub Task). Format will be AAXXXXXX.0000 where AA is the 2 digit department code and 0000 represents a sequence number. The Project Task and Sub Task will be visible in the Project Description field. Take care to check the correct code has been selected. **Note:** Costing information needs to be specified here ONLY if the funding for the allowance is from a different cost allocation to the funding for this appointment.
Expense	Leave blank - this field is not used by the University.

Reason *	Select the relevant reason code, e.g. Allowance Awarded.
Comments*	Enter comments as applicable.
Reference	No longer in use. References entered previously will still be displayed.

7. Click OK. The *Add Allowances* window closes. Multiple allowances can be added at this time if required.

8. Click OK. The system will ask if you are sure you want to add this salary amendment. Click Yes.

9. The *Maintain HR Salary Amendments* window opens. If you have Salary Approval access and it is appropriate to do so you can approve the allowance change straight away.

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

NEXT STEPS: Unless you were able to approve the allowance, the allowance 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.