PA2n - Nuffield Medical Fellow

> **What's changed?**
> Cost allocation guidance has been updated for clarity *Feb17*

As Nuffield Medical Fellow are non-employees you cannot use the Staff Request process to request a post for them. Instead email the HRIS Support Centre with the following details and they will create the post for you. You can then continue and appoint the Nuffield Medical Fellow as a 'direct appointment', with specific data detailed below which is important for reporting purposes.

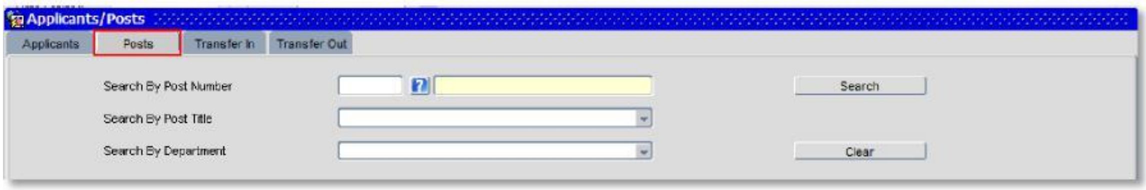
Required information when requesting a new post for a Nuffield Medical Fellow:

- Expected Start Date
- Expected End Date
- Department
- Pay Administered by (usually the division)
- Location
- Default cost centre for the department (usually VR0000 for NMFs).
- Hours to be worked
- Salary

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. Enter the **Post Number**. Click Search. The system displays the relevant Post.

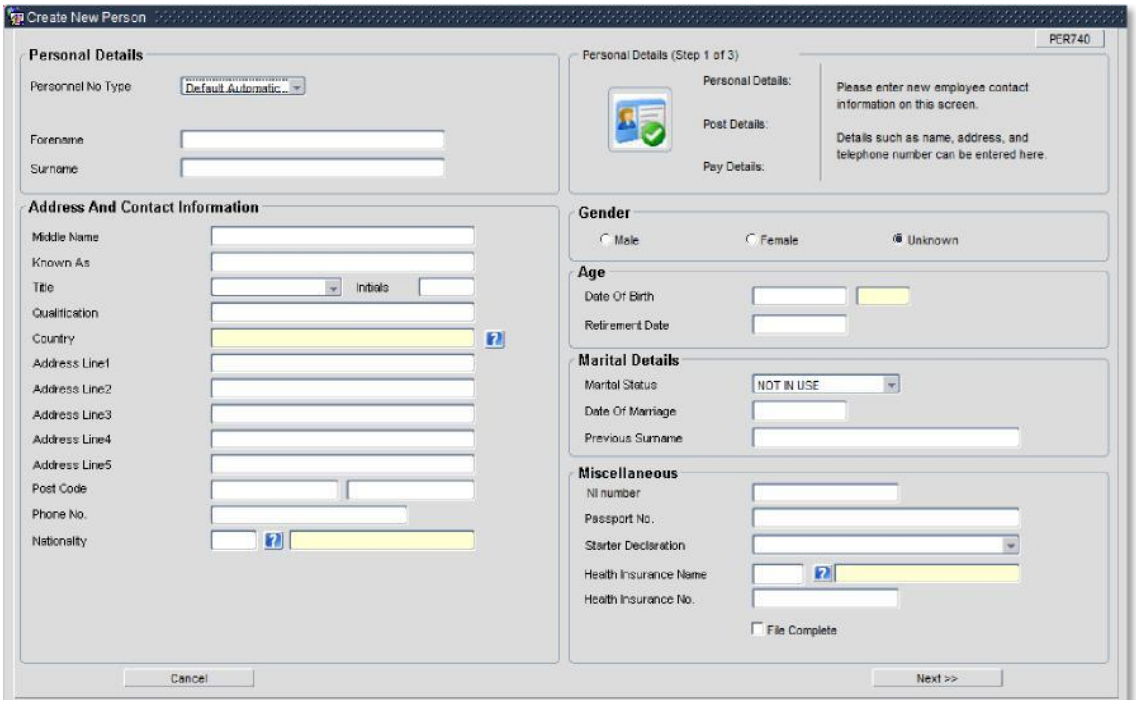
4. Click the Select button (to the right). The *New Appointment Search* window opens

5. 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.

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 an Additional Appointment or Rehire as appropriate. Refer to ***QRG: Appoint Existing Employee to an Additional Post (PA2b)*** or ***Appoint Rehire (PA2d)*** - but remember to complete the specific appointment details as per the guidance on page 3 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 as their record may have restricted access.

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:

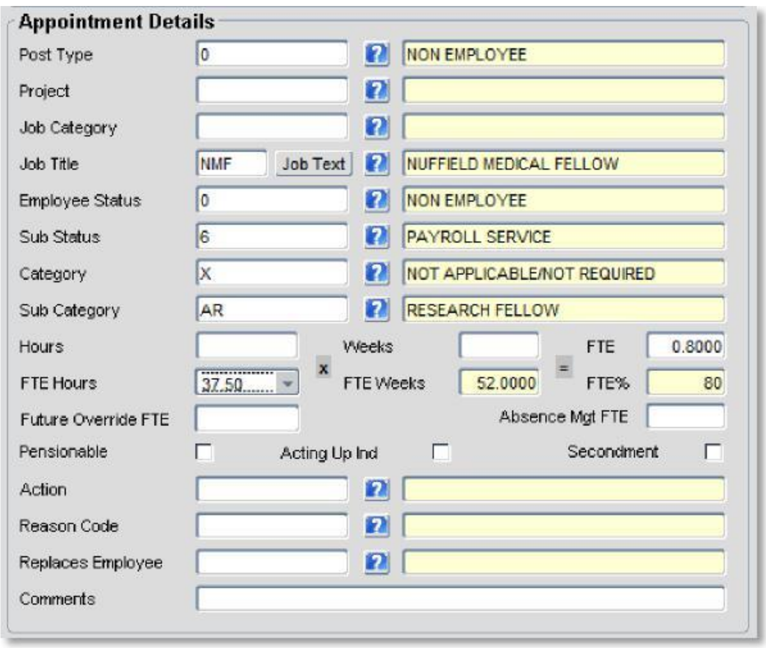


8. Complete the fields as below.

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. 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.

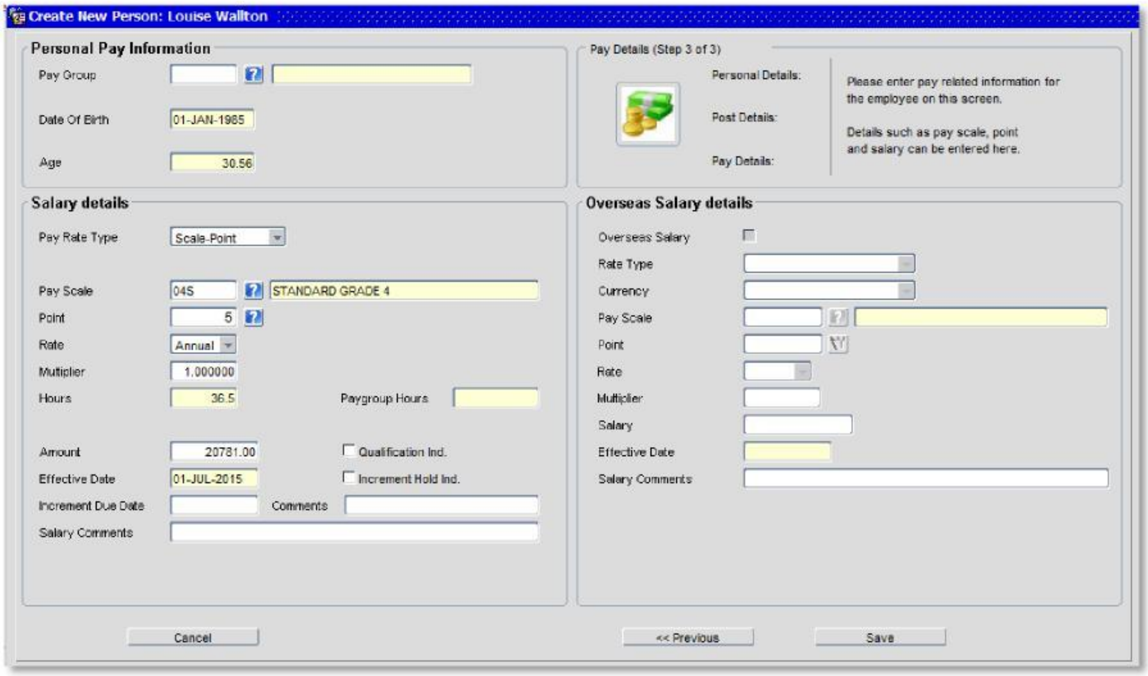
	NB: even though this field is shaded yellow it must be updated for HMRC (RTI) purposes.
Address *	Enter/check full address details.
Post Code *	Enter/check it is entered across both fields in alpha numeric format as shown AA1(1) (1)1AA.
Phone No. *	Enter/check phone number. NB: this field should contain 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	Not required at this point
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.

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 e.g. for fixed term post.
Post Type	Should be Non-employee.
Project	Leave blank. Field no longer in use.
Job Category	Do not use.
Job Title *	Should be Nuffield Medical Fellow.
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 salary.
Category *	Select Not Applicable/Not Required.
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. Would expect to use AR (Research Fellow) for this type of post. **This field must be completed to prevent failure of interfaces to other systems.**
Hours *	Enter actual hours worked, 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.
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. See **PA4 Managing Term Time Only Appointments.**
FTE Weeks	This field will be set by the system to 52.
Action *	Select **New Appointment.**
Reason Code *	Select **New Starter – New to University**



11. Click Next >>.

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

Field Name (* mandatory)	Description
Pay Group *	Select **Monthly (20)**
Pay Scale	Select **NMF67**
Point *	Select correct point.
Multiplier *	Should reflect FTE
Paygroup Hours	This value has no impact on pay and should be ignored.
Increment Due Date *	Not used
Comments	Enter comments if required, e.g. no increment due date.
Salary Comments *	Enter notes for the Approver/ Payroll, to re-iterate the type of appointment e.g., **Nuffield Medical Fellow**.

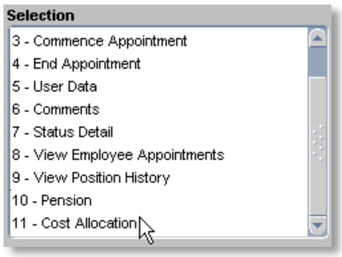
13. Click Save. **Note:** You should make a note of the Personnel Number for your future reference.

14. Click OK. You are returned to the *Appointment Details window* (PER746).

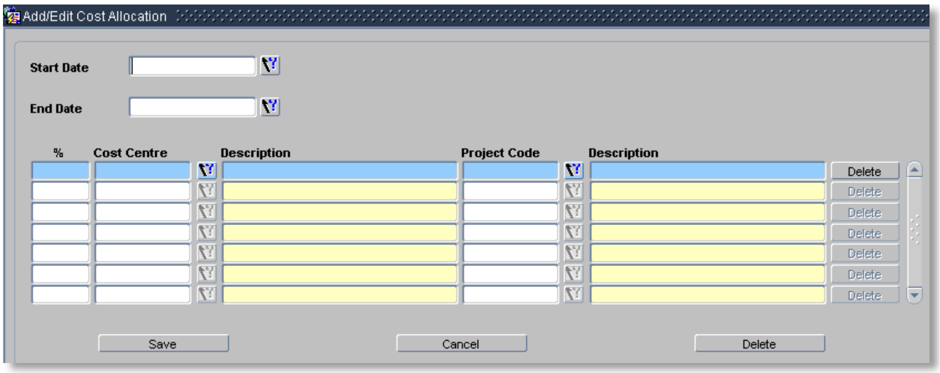
Allocate funding (Cost Allocations)

1. Click **Appointment Details** button – *Post Appt Maintenance (PER620)* window opens.

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



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



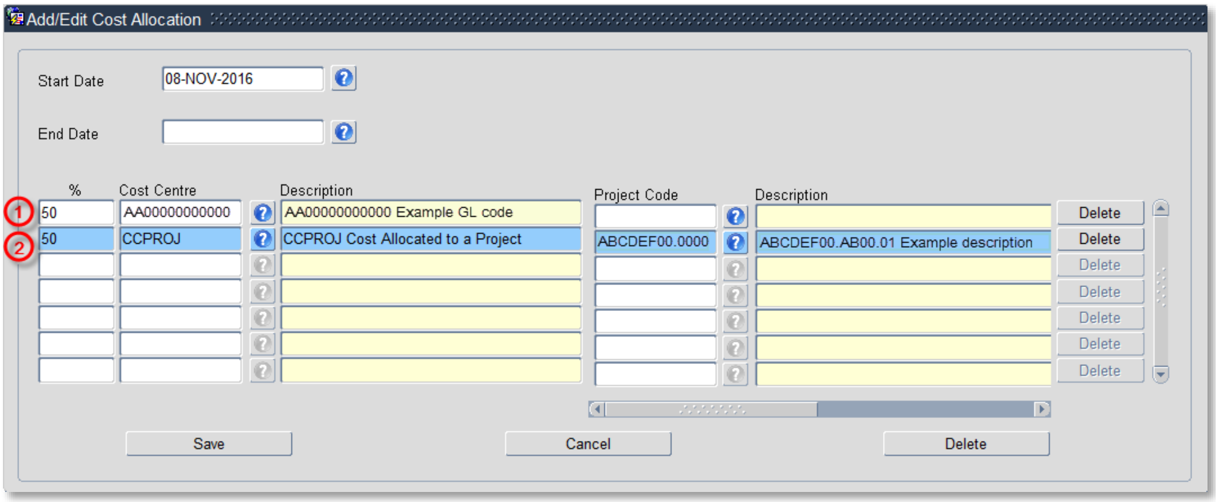
4. Complete details as below:

Field Name (* mandatory)	Description
Start Date *	Enter the start date for the new cost allocation (should be the same as the appointment 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.

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**.



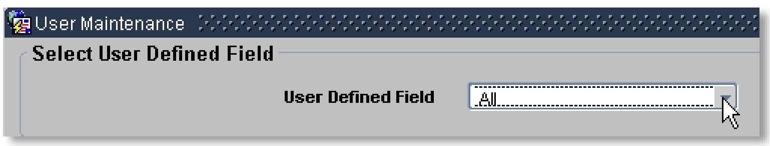
5. Click Save then OK. You are returned to the *Cost Allocations* window.

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 HR Information 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.

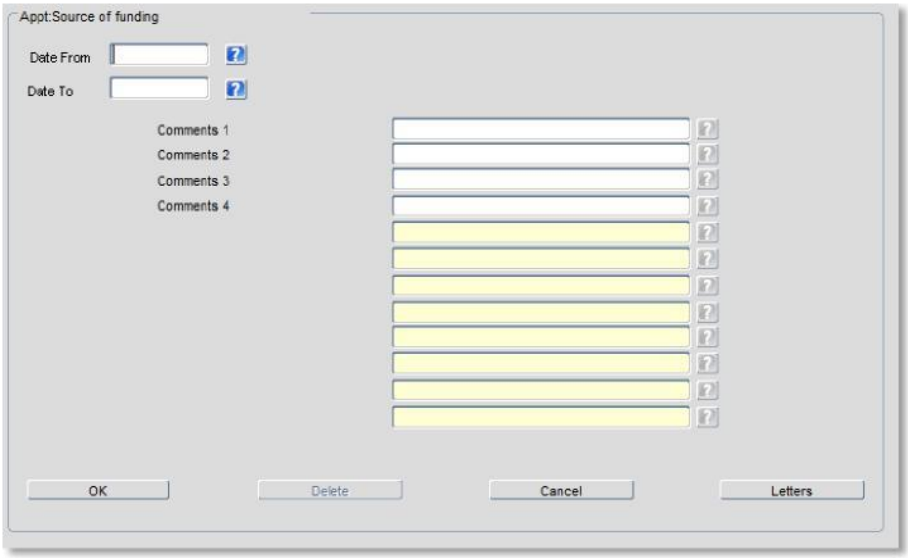
1. Go to **Selection box** > **User Data**. The User Maintenance window opens.



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.

NEXT STEPS:
Continue from **QRG: PANS0_Pre-arrival and New starter guide** section D onwards