

PA2q - Setting up a non-employee (visiting academic or student)

This guide shows how to set up the record for a non-employee such as a visiting academic, student, etc.

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



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: Refer to **QRG: PA2h_Set up a Non-Employee (including Agency Workers)** for guidance on other types of non-employee.


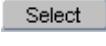
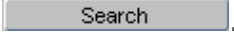
This guide covers the following process steps:

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Navigate to: Personnel > Maintenance > Personal Profile

A. Appoint Visitor

The employee Search window opens:

1. Click the  button. The *Applicants/Posts window* opens.
2. Select the **Posts** tab.
3. Locate the **NONEMP** post in the **Post** list.
4. Click the  button to the right of the Post. The *New Appointment Search window* opens.
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 .

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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.

- 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 or Additional Appointment as required. Refer to the relevant QRG but remember to complete the specific appointment details as per the guidance in this guide.

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

- 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.

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Initials *	Enter initials for forename and middle names.
Qualification	Field not in use.
Address *	Enter full address details.
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 * 	Enter details where available.
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 * 	Enter details where available.
Health Insurance Name/No.	Field not in use.
File Complete	Field not in use.

9. Click .

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10. Complete the fields as below:

Field Name (* mandatory)	Description
Start Date *	Enter agreed start date.
Target End Date	Enter agreed end date.
Company to Pay Administered by	Enter all hierarchy details as appropriate.
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.
Location	Select the location as appropriate.
Work Group	Not required. Leave as 'Core Default Work Group'.
College Association	Select the College as appropriate.
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. Should be changed to actual job title, eg Non-emp academic visitor or Non-emp visiting student.
Job Text	Click the button and enter the actual job title (in upper and lower case), if required.
Employee Status *	Select Non-employee .
Sub Status *	Select Non-employee .

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Category *	Select Not Applicable/Not Required .
Sub Category *	Select if there is an appropriate option or leave blank.
Hours *	Enter, e.g. 0.
FTE Hours *	Enter 0 .
FTE *	Enter 0 .
Weeks	Term-time employees only
FTE Weeks	Term-time employees only
FTE% *	Should be 0%.
Action *	Select New Appointment
Reason Code *	Select New Appointment (Non-employee)

11. Click .

The screenshot shows the 'Create New Person' form with the following fields and values:

- Personal Pay Information:** Pay Group: 99 (NON EMPLOYEES), Date Of Birth: 01-JUL-1986, Age: 31.84.
- Salary details:** Pay Rate Type: Scale-Point, Pay Scale: N99, Point: 1, Rate: Annual, Multiplier: .000000, Hours: 0, Paygroup Hours: 99, Amount: .01, Effective Date: 20-JUN-2018.
- Overseas Salary details:** Overseas Salary: , Rate Type, Currency, Pay Scale, Point, Rate, Multiplier, Salary, Effective Date, Salary Comments.

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 their paygroup is currently 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.

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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 .

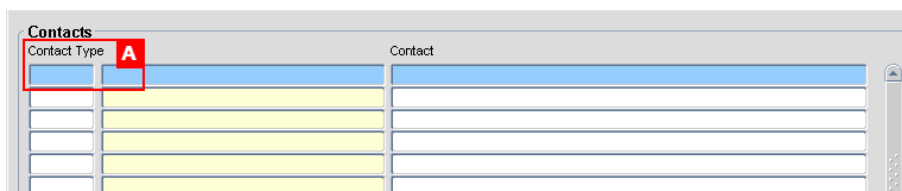


You should make a note of the Personnel Number for your future reference.

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

B. Additional Contact Information

To record any additional contact information e.g. Email address, mobile number, from the **Select Detail** box go to **Contacts**.




1. Click in the **Contact Type** field **[A]**.

2. Click the  button in the Tool Bar.


3. Select the relevant value from the list. Click .

4. Enter the relevant details into the **Contact** field.

5. Click . Repeat if required to add further contact details.

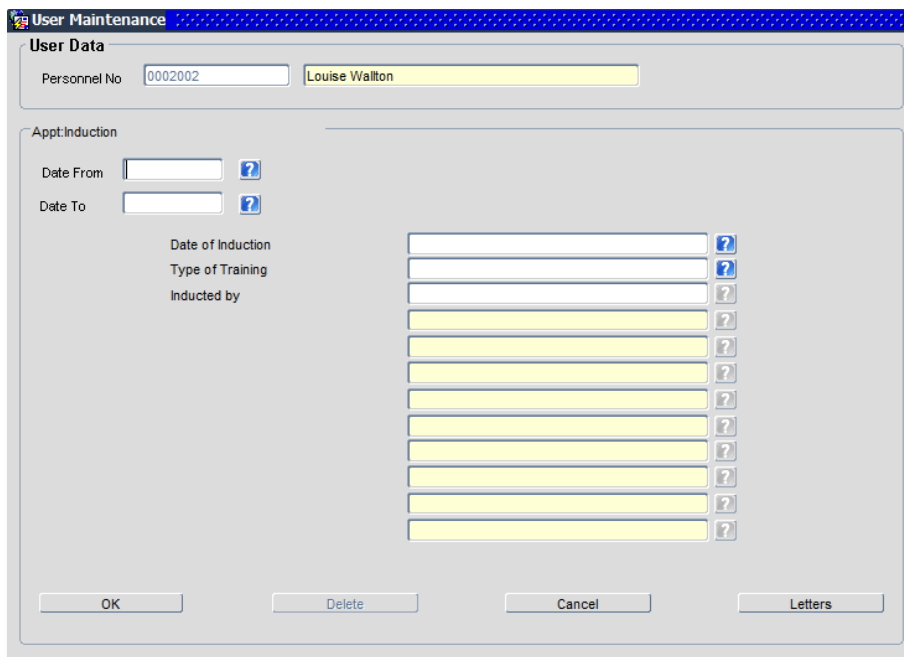
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C. Next of Kin (Emergency contact)

1. Go to **Select Detail** box > **Next of Kin**.
2. Enter next of kin information as required.
3. **Comments:** If required, details of a second emergency contact can be stored here. Click .

D. Safety Details

1. Safety training details should be captured as per **QRG: IP1_Record Induction Details**. A new UDF will be required for each different piece of training.



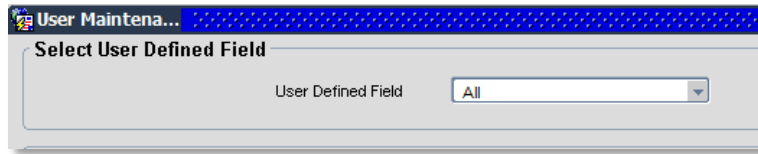
The screenshot shows the 'User Maintenance' window with the 'User Data' section filled in (Personnel No: 0002002, Name: Louise Walton). The 'Appt Induction' section contains several fields: 'Date From', 'Date To', 'Date of Induction', 'Type of Training', and 'Inducted by'. Each of these fields has a corresponding empty input box with a question mark icon to its right. Below the input boxes are four buttons: 'OK', 'Delete', 'Cancel', and 'Letters'.

E. Additional Directory Information

Various additional information can be captured as required. To create the UDF:

1. Click the **Appointment Details** button. The *Post Appointment Maintenance* window
2. Go to **Selection** box > **User Data**. The *User Maintenance* window opens.

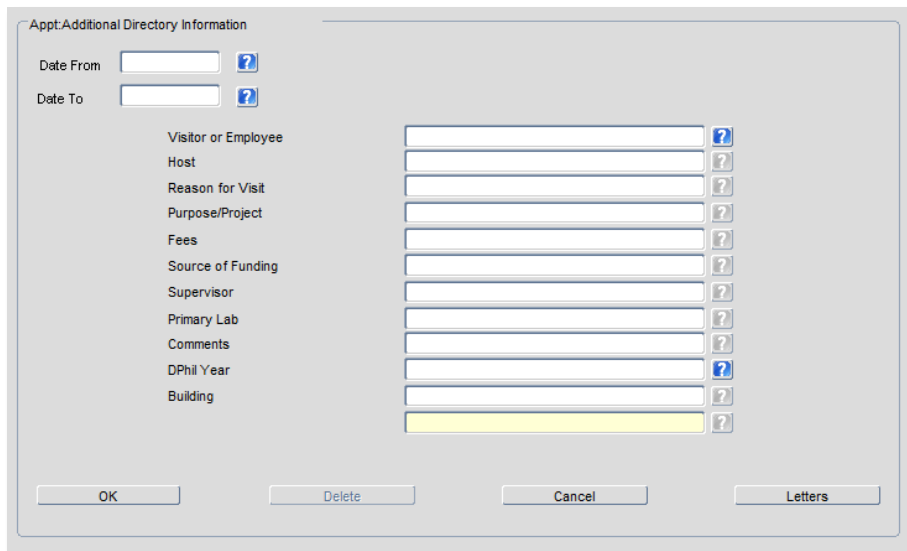
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3. Click to display **User Defined Field** List of Values.

4. Select **Appt: Additional Directory Information**.

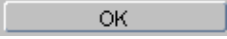

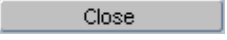
5. Click .



Field Name	Description
Date From	Enter start date.
Date To	Leave blank.
Visitor or Employee	Select as required.
Host	Enter details as required.
Reason for Visit	Enter details as required.
Purpose/Project	Enter details as required.
Fees	Enter details as required.
Source of Funding	Enter details as required.
Supervisor	Enter details as required.
Primary Lab	Enter details as required.

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Comments	Enter details as required. If individual is a Qualified First Aider this should be noted here.
Dphil Year	Select as required.
Building	Enter details as required.

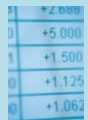
6. Click . A 'transaction complete' message will appear. Click  then . Exit back as required.



For details on maintaining the Additional Directory Information UDF refer to **QRG: FD6_Additional Directory Information**.

NEXT STEPS:

- 1. Note:** the system auto-commences the individual, so you do not need to go through the Commence process in Core. However, remember a salary approval record will be created and you should also carry out the relevant right to work checks.
2. Follow **QRG: PANS0 Pre Arrival and New Starter Guide**
3. Follow **QRG: EA1_End Appointments** for details on closing the record of a non-employee.



2	+2.0000
0	+5.000
1	+1.500
0	+1.125
0	+1.062

Useful Reports

The PERDEP43 Additional Directory Information report is available to enable you to extract the data for local directories, etc.