PANS0 - Pre-arrival and new starter guide

HRIS SUPPORT CENTRE

What's changed?
Note added following changes to legislation to issue all employees with a contract on or before their first day.
Mar 20

Once you have selected your preferred candidate, but before they start in their new position, there are a number of tasks to be completed – sections A to D inclusive.

More detailed information about the individual and their appointment can be captured before they arrive or on their first day as preferred – section E onwards.

ALL sections covered in this guide are mandatory. However please note that the items listed below are required only where they apply to the role:

- Academic teaching and/or research subjects – for Academic teaching and/or research roles
- Academic title/Whitebook - for Academic teaching roles
- NHS contract details – for Academic teaching and/or research roles in Medical Sciences.

Refer also to the New starter checklist.

Note: Items marked with this symbol ◆ are required for HESA reporting. Further guidance on completing these items can be found on the HR Analytics team website.

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

This guide covers the following process steps:

Pre-Arrival

A. Record Offer and Acceptance Details

Note: If the individual applied via e-Recruitment the offer must have been recorded in the e-Recruitment module by the 'Recruitment Administrator' before you can proceed.

B. Appoint New Starter (New to University)

The steps below show how to appoint and commence an individual new to the University. This includes all pre-employment checks, new starter checks and all of the information that must be added to the employee record in CorePersonnel.

Note: Legislation requires that all new employees receive contracts on or before their first day. In order to produce an employee contract via CoreHR, you will need to have appointed the successful candidate. You should only do this once a start date has been confirmed with the employee. For guidance on producing the contract refer to section D.

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.

Alternatively, refer to one of the following QRGs:

- **PA2b Additional Appointments**
- **PA2c Appoint variable hours employee**
- **PA2d Appointing a rehire** where an individual has previously worked at the University
- **PA2e Transfers between Departments**
- **PA2f Transferring Within the Same Department**
- **PA2g Direct appoint** for new starters not via e-Recruitment, e.g. named on grant
- **PA11 Managing casual worker records** for all casual worker and teacher appointments

Note: If the appointment is jointly with another higher education institution (HEI) please contact hr.reporting@admin.ox.ac.uk to notify them of this.

For TUPE and hybrid T&C employees it is important to refer to Personnel Services before proceeding with the appointment

Navigate to: Personnel > Maintenance > Personal Profile

The *Employee Search* window opens:

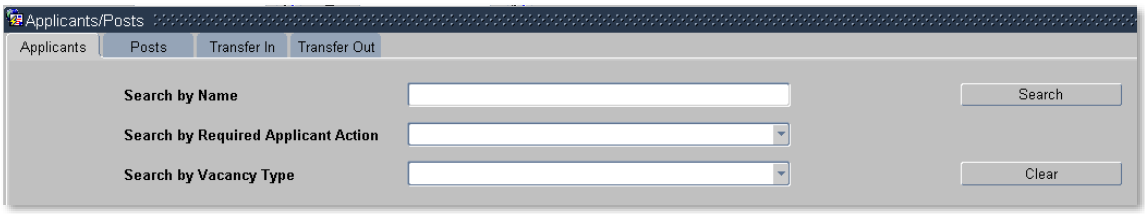
1. Click the New Appointments button. The *Applicants/Posts* window opens.

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

2. Locating the applicant or post

2.1 Via e-Recruitment (applicant)

In the Applicants/Posts window:



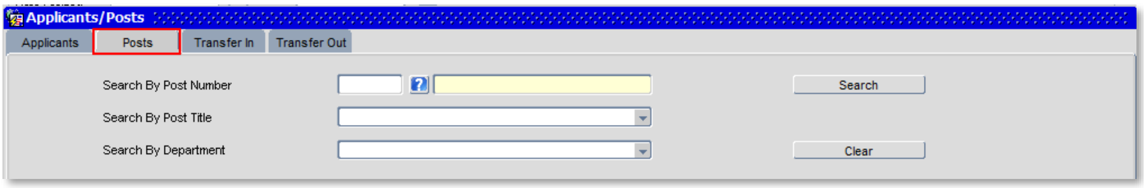
2.1.1 On the Applicants tab locate the relevant Applicant in the list, using the search criteria if needed. Check the Post and Recruitment ID (Vacancy number) are as expected.

2.1.2 Click the Select button to the right of the relevant Applicant.

2.2 Not via e-Recruitment (direct)

In the Applicants/Posts window:

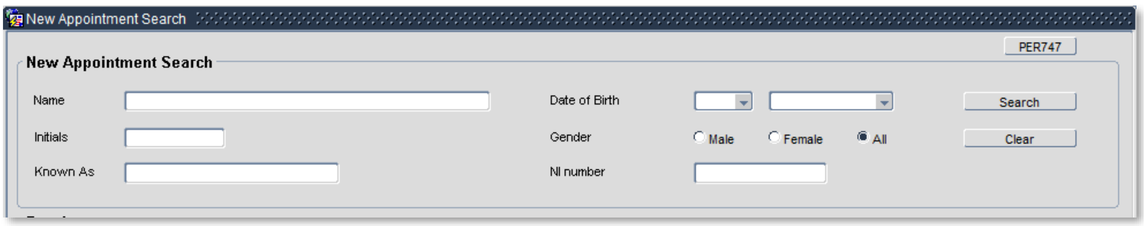
2.2.1 Select the Posts tab and enter the Post Number.



2.2.2 Click Search .The system displays the relevant Post.

2.2.3 Click the Select button to the right of the post.

The *New Appointment Search* window opens:



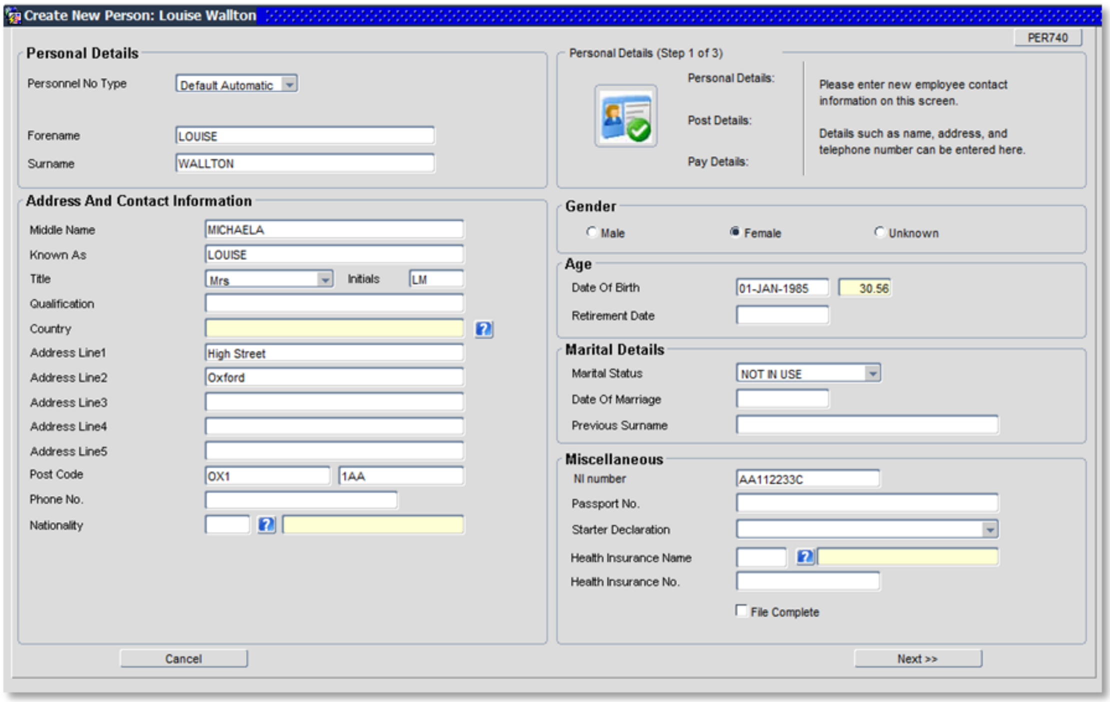
Use the Search criteria to ensure the individual does not already have a Personnel record. You should search separately on at least 2 of the following criteria: Name (**Surname**), **NI number, Date of Birth.** Enter <u>one</u> of the search criteria and click Search . Click on Clear before entering the next search criteria to ensure you are searching on each item separately.

> **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.

2.2.4 As an individual new to the University the appointee SHOULD NOT exist in the database. The search results list will remain blank. (If they are found they should be managed as a rehire. Refer to **QRG: PA2d_Appoint rehire**.

2.2.5 Assuming the individual has not been found; click Create New Starter .The 3-step 'New Person Record Wizard' opens.

3. Personal details



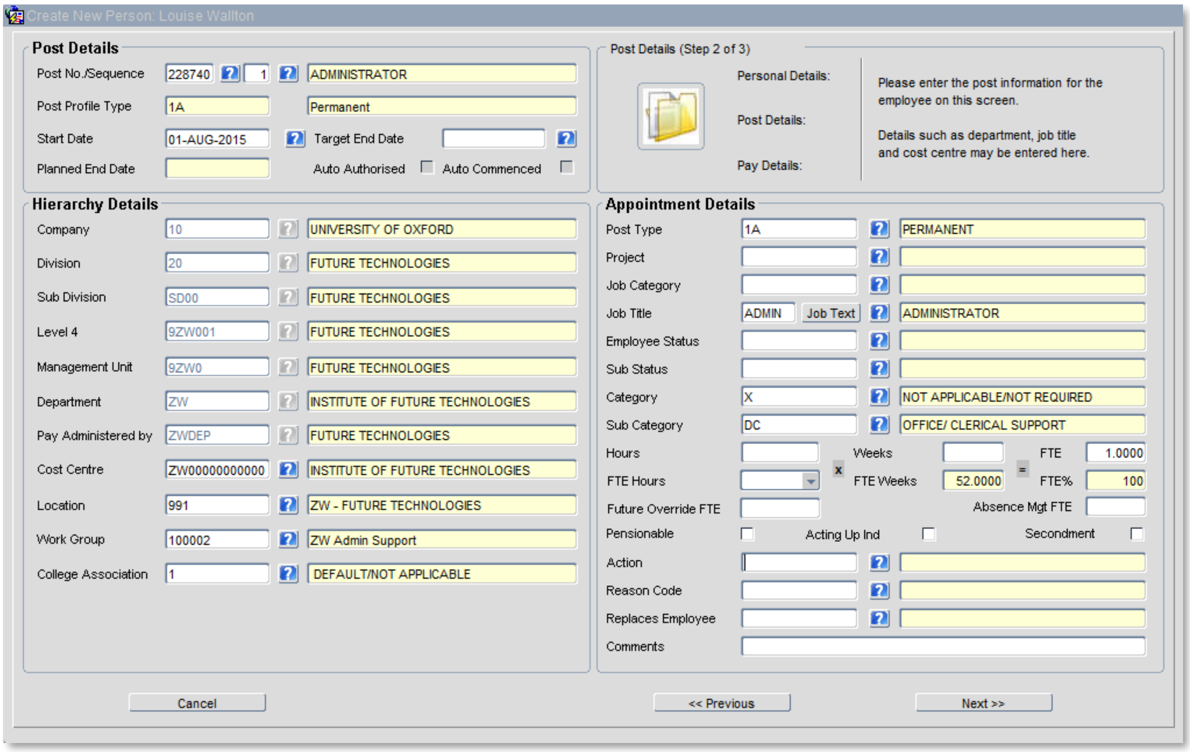
3.1 Check/complete the fields as below:

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 only. Do not enter any spaces, hyphens or full stops in this field.
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.
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. **NB:** it is essential that the DoB is completed in full as soon as possible as it is needed by the Pension team who have very strict timescales to work to.
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
Health Insurance Name/No.	Field not in use.
File Complete	Field not in use.

3.2 Click Next >>.

4. Appointment details



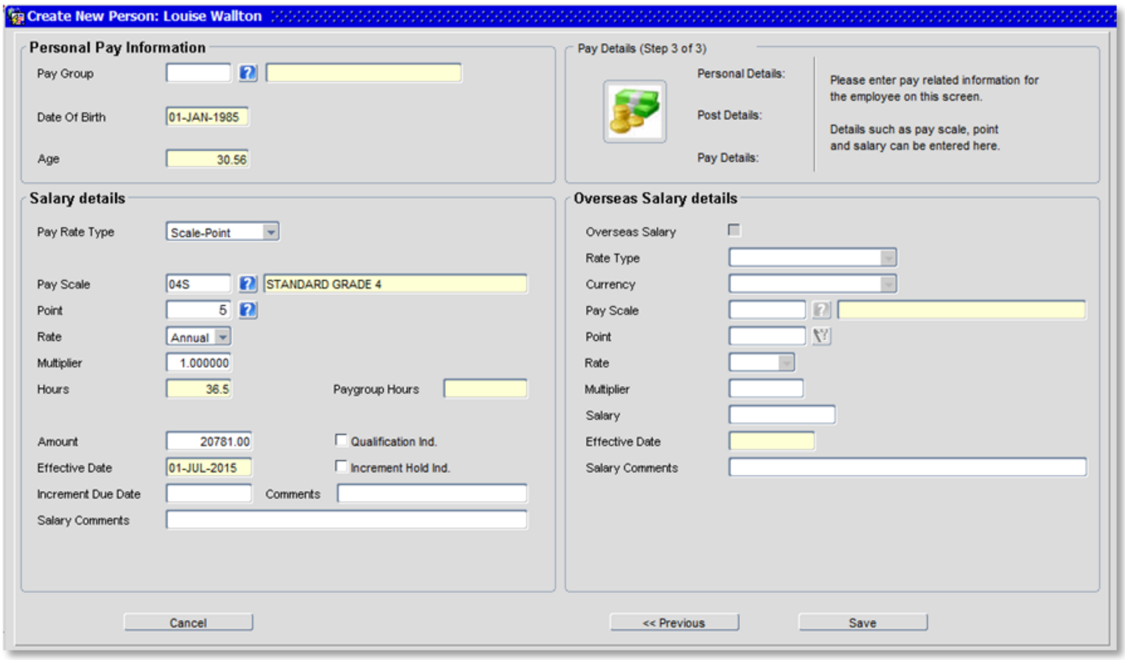
4.1 Check/update if required:

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 contract end date for Fixed Term posts
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*	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. Field no longer in use.
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 *	Check/select relevant e.g. Permanent, Fixed term.
Sub Status * ◆	Select relevant, e.g. Full-Time, Part-Time, Term Time
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. **Note: This field is used for statutory reporting and is especially important for HESA and REF exercises.**
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 Analytics team website. **This field must be completed to prevent failure of interfaces to other systems.**
Hours *	Enter actual hours worked, e.g. 37.5
FTE Hours *	Select the relevant hours for the grade. **NB**: when you tab or click out of the hours field, the FTE% will automatically be updated.
FTE *	Check as expected and update Hours if necessary to correct.
FTE% *	Check as expected and update Hours if necessary to correct.
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**.
Replaces employee	Do not use

4.2 Click Next >>.

5. Pay details



5.1. 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 *	Check as expected. If it is not, click Previous, and correct Hours.
Paygroup Hours	This value has no impact on pay and should be ignored.
Increment Due Date *	Enter relevant date, in accordance with Personnel Services guidance. Note: This can be more than a year in the future.
Comments	Enter comments if required relevant to the increment due date. **NB:** do not enter salary comments in this field as it is not regularly reviewed by payroll.
Salary Comments *	Enter notes for the Approver/ Payroll, to re-iterate the type of appointment e.g. New starter.

5.2. Click Save

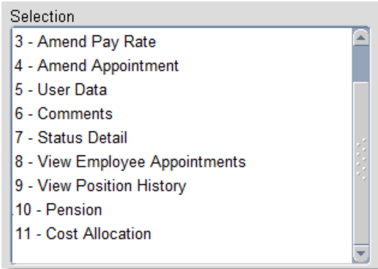
Make a note of the Personnel Number for your future reference.

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

C. Allocate Funding (Cost Allocations)

1. Click Appointment Details button. The Post Appt Maintenance window opens.

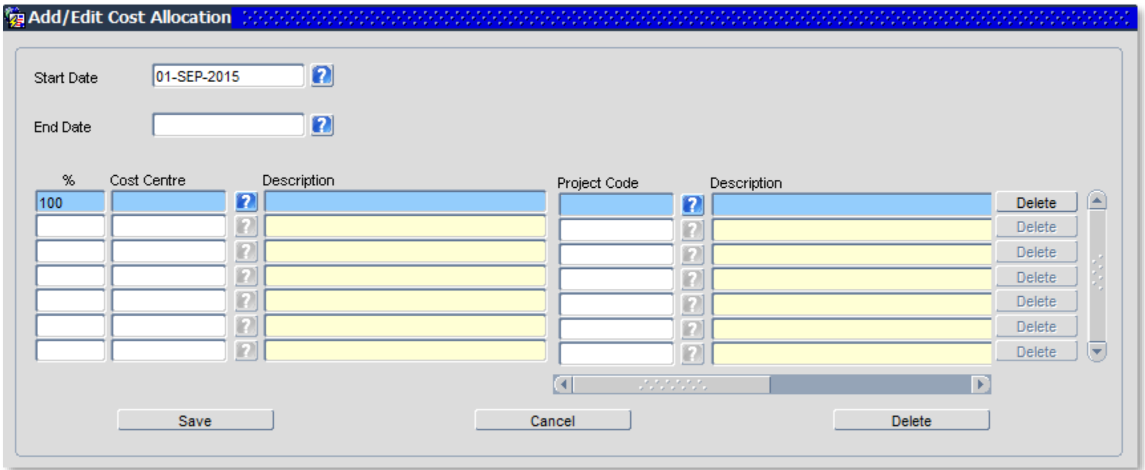
2. Go to Selection > Cost Allocation. The Cost Allocation window opens.



3. Check to see if a cost allocation already exists (this will be the case if it was entered on the Staff Request).

4. Click Edit to update if the details have changed or click Add Allocation button.

5. The *Add/Edit Cost Allocation window* opens:



6. Complete details as below:

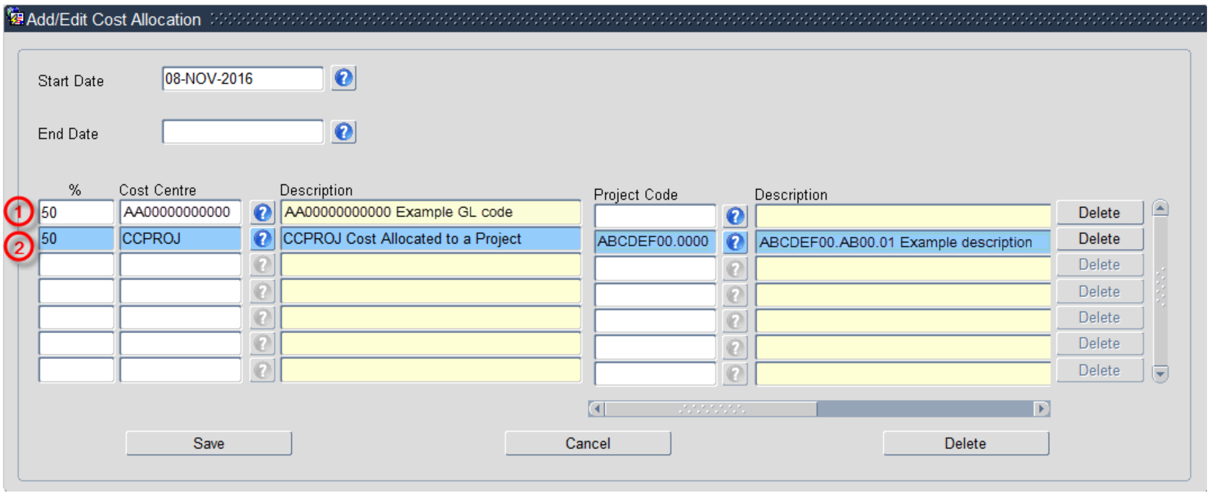
Field Name (* mandatory)	**Description**
Start Date *	Enter the start date for the new cost allocation (should be the same as the appointment start date).
End Date	Enter the end date if required.
% *	Enter %, e.g. 100, 50. **NB**: allocation can be split between more than one Cost Centre or Project but the allocation must add up to 100%.
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

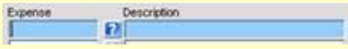
Notes: You can type the cost centre straight in, but it must be in upper case.
Always use the search function when entering a project code(s)
When searching, the name/description is displayed in the first column in the search results; scroll right to view the codes.

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**.



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.

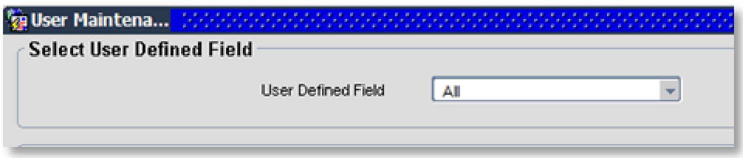
7. Click Save then OK . You are returned to the *Cost Allocations* window.

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

♦ Source of Funds (additional funding information)

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.

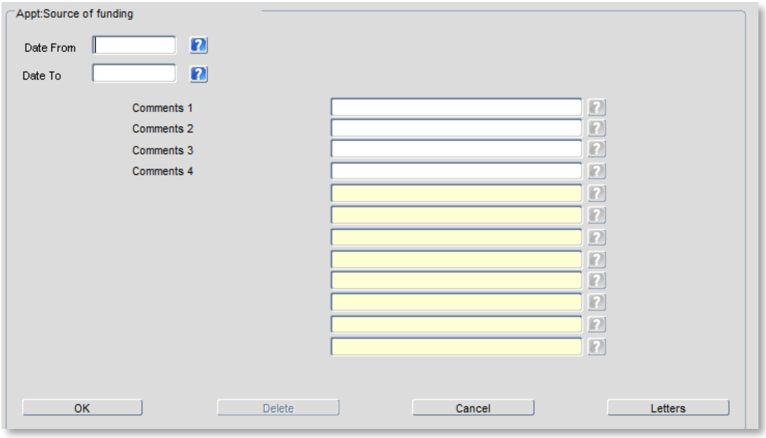
1. Go to **Selection** box > **User Data**. The *User Maintenance* window opens.



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

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

4. Click New.



5. Complete the fields as below:

Field Name (* mandatory)	**Description**
Date from*	Enter the start date of the appointment
Date to	Leave blank
Comments 1* through 4	Enter as applicable

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

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

D. Generate Letters and Forms

Depending on local departmental procedures you may want to send your chosen applicant a **conditional offer letter**.
The following documents can also be generated from the letter module in Core Personnel.

- **University Card Form**
- **Contract**
- **New starter health questionnaire**
- **Data collection form**
- **Casual letter of engagement**
- **Casual teaching contract for services**

> **Note:** Currently academic contracts and departmental lecturer contracts are not generated through CoreHR.

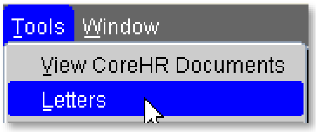
Navigate to: Personnel > Maintenance > Personal Profile

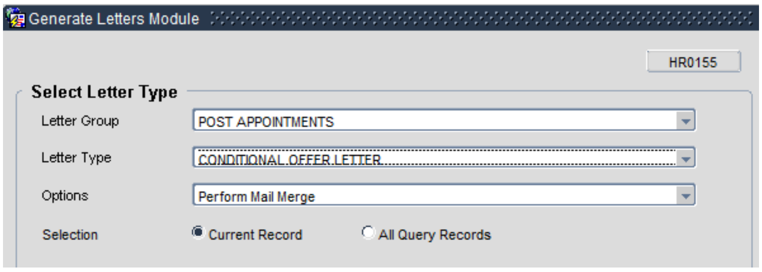
1. Search for the relevant employee record and go to **Select Detail** box > **Appointment Details.** The *Appointment Details* window opens.

2. If relevant, click into the **Appointment ID** to ensure the correct appointment is highlighted.

3. Click on the [Appointment Details] button. The *Post Appointment Maintenance* window opens.

4. Go to **Tools** > **Letters**. The *Generate Letters Module* window opens:





5. Select Letter Group: Post Appointments

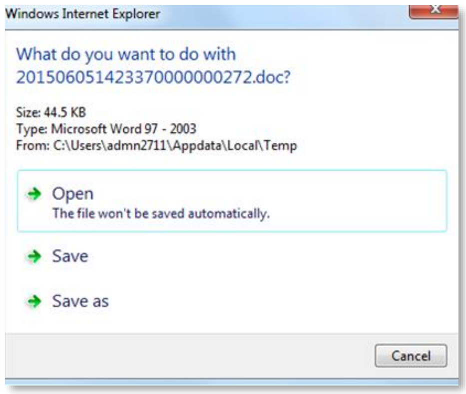
6. Select Letter Type: as applicable (see table below)

7. Options will default to 'Perform Mail Merge' and must not be changed

8. Ensure current record is selected and click [OK].

9. Choose 'Open' for prompts to appear

10. If you can't see the prompt questions, minimise all screens to find prompt box



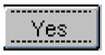
Document type	Letter type	Comments
Conditional Offer letter	Conditional Offer 1	Includes new starter health declaration form
University Card Form	University Card Form	
Congregation Form	Congregation Nomination Form	
Data Collection Form	Data Collection Form	
Contract	Select the required contract template from the list. **It is important that you select the correct contract template depending on the type of post.**	The template will be pre-populated with standard paragraphs in accordance with the data selected in the **Employee Status** and **Sub Status** fields. It is important that these have been completed accurately so the contract letter is appropriately populated. Includes the new starter health declaration form.
New starter health questionnaire		Required for roles that will involve hazards and/or safety critical activities.
Casual letter of engagement	Casual worker engagement letter	If you are appointing a casual worker or teacher please follow **QRG PA11 Managing casual worker records**
Casual teaching contract for services	Casual teaching contract for services	

11. The Word document will open.

12. If the message below appears at the top of the page click on **Enable Content**.

13. Save the document in a secure location as a .doc or .docx file and Exit to return to CoreHR.

14. Close the window in your browser.

15. The system displays a message: 'Did the letter print successfully?' Click 

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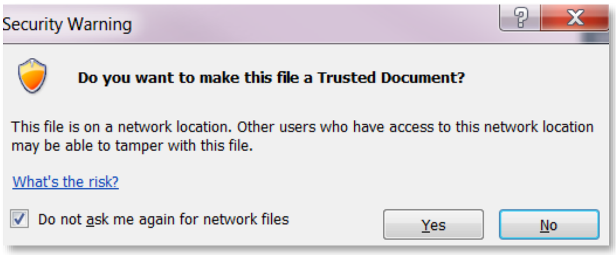
> **Note:** The above message will also appear if you re-open the document. Either click on **'Enable Content'** or the 'x' on the right-hand side which will ensure that the macro will not re-run as it has now been disabled.

If you receive the message below, select 'No'.



If the document is saved as a .docx you will not see the above Security Warning message when reopening a saved document.

NEXT STEPS: Having generated the letter/contract it must be signed by an appropriately authorised signatory within your department before being sent to the individual. If relevant a Medical Questionnaire can be sent with the letter.
To track the contract you should update the relevant part of the Appointment User Data once the letter has been signed and returned by the individual. See ***Section E: New Starter Checks*** for details.

E. Pre-employment and New Starter Checks

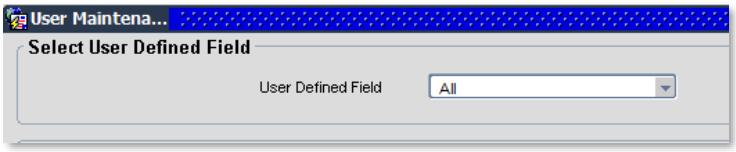
1. Recording pre-employment checks

For those appointed via e-Recruitment, pre-employment checks will generally have been initiated during recruitment. For these individuals and 'direct appointments', it is important to ensure that the completion of the checks is correctly logged within Core Personnel.

Navigate to: Personnel > Maintenance > Personal Profile

1.1 Search for the relevant employee record and go to **Select Detail** > **Appointment Details.** The *Appointment Details* window opens.

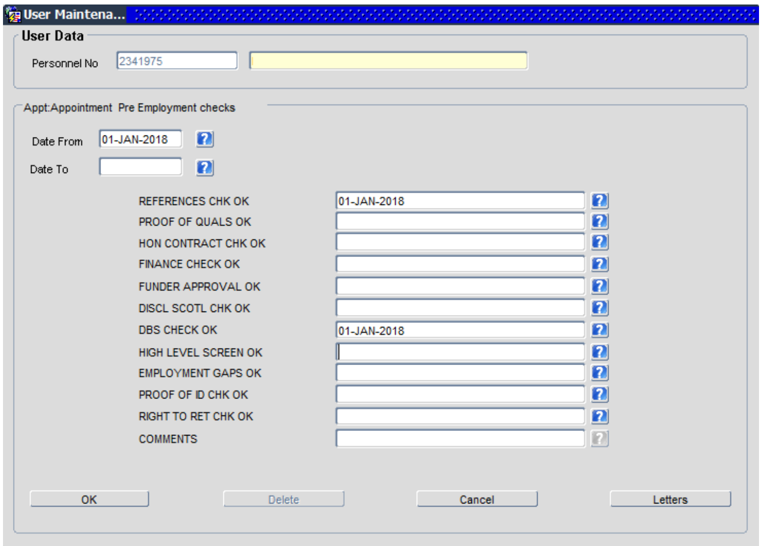
1.2 If relevant, click into the **Appointment ID** to ensure the correct appointment is highlighted. Click the [Appointment Details] button. The *Post Appointment Maintenance* window opens.



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

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

1.5 Select **Appt: Appointment Pre Employment checks** and click [New].



1.6 Click on the [?] button against each item to record the date of the event or check:

Field Name (* mandatory)	**Description**
Date from*	Enter the start date of the appointment
Date to	Leave blank
References Chk OK *	Satisfactory references have been received.
Proof of Quals OK	Qualifications have been checked (if relevant). E.g. check of GMC register; driving licences; academic qualifications.
Hon Contract Chk OK	Honorary Contract or Letter of Access checked (if relevant, depending on the specifics of the post).
Finance Check OK	Finance/credit reference checks completed (for roles where lone staff are responsible for valuable objects, cash etc.).

Funder Approval OK	Funding body approval obtained (where required, e.g. some BHF funded posts require approval of the appointment by the funder).
Discl Scotl Chk OK	Disclosure Scotland checks completed (verification of a person where DBS check is not required).
DBS Check OK	DBS check completed satisfactorily (for eligible posts only).
High Level Screen OK	High Level screening clearance obtained e.g. for roles with dangerous chemicals or animals.
Employment Gaps OK *	Any gaps in employment checked (if relevant).
Proof of ID Chk OK *	Proof of identity and address obtained.
Right to Ret Chk OK *	For previous employees, check of leaving reason codes to ensure individual is not excluded from working at the University.
Comments	Make a note in this field of any checks which are not applicable for this post or individual to indicate that checks above with no date have not been forgotten and are intentionally blank.

1.7 When relevant checks have been recorded click OK. A 'transaction complete' message will appear. Click OK.

2. Recording new starter checks

In addition to pre-employment checks there are a number of activities that should be logged both before the new starter arrives and on their first day. It is important to ensure that these are correctly logged within Core Personnel.

Note: Whilst Right to Work checks are not recorded here it is essential that these checks are completed BEFORE any work commences.
(see section G part 5 for details)

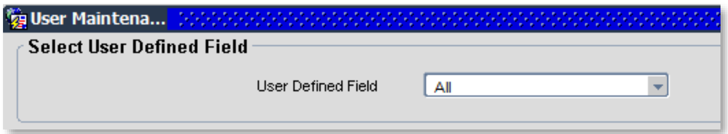
Navigate to: Personnel > Maintenance > Personal Profile

2.1 Enter search criteria e.g. Name (**Surname** followed by first initial) or **Personnel No**, click Search and open the relevant employee record. The *Personal Profile Maintenance* window opens:

2.2 **Select Detail** > **Appointment Details.** The *Appointment Details* window opens.

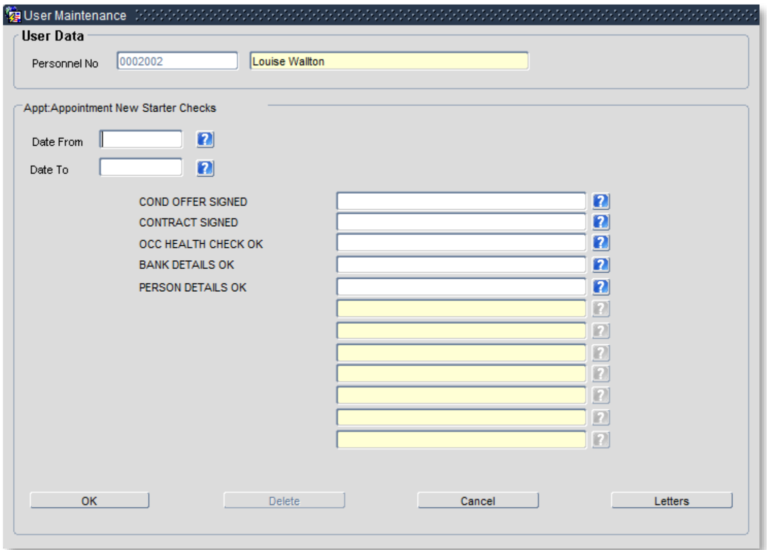
2.3 If relevant, click into the **Appointment ID** to ensure the correct appointment is highlighted. Click the [Appointment Details] button. The *Post Appointment Maintenance* window opens.

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



2.5 Click to display User Defined Field List of Values.

2.6 Select **Appt: Appointment New Starter Checks** and click [New].



2.7 Click on the  button to select the date that each of the following activities/checks took place:

Field Name (* mandatory)	**Description**
Date from*	Enter the start date of the appointment

Date to	Leave blank
Cond Offer Signed	Conditional offer returned (signed) by the new starter (if relevant).
Contract Signed *	Contract returned (signed) by the new starter.
Occ Health Check OK *	Health declaration/questionnaire completed and OK.
And once the individual has arrived for their first day update the following:	
Bank Details OK*	Bank details entered and checked
Person Details OK*	Person details checked and updated if applicable

2.8 When relevant checks have been recorded click OK. A 'transaction complete' message will appear. Click OK.

F. Capture White Book Data (if applicable)

For certain appointments (typically academic) additional information will need to be captured for entry in the White Book.

Navigate to: Personnel > Maintenance > Personal Profile

1. Enter search criteria e.g. Name (**Surname** followed by first initial) or **Personnel No,** click Search and open the relevant employee record. The *Personal Profile Maintenance* window opens:

2. **Select Detail** > **Appointment Details.** The *Appointment Details* window opens.

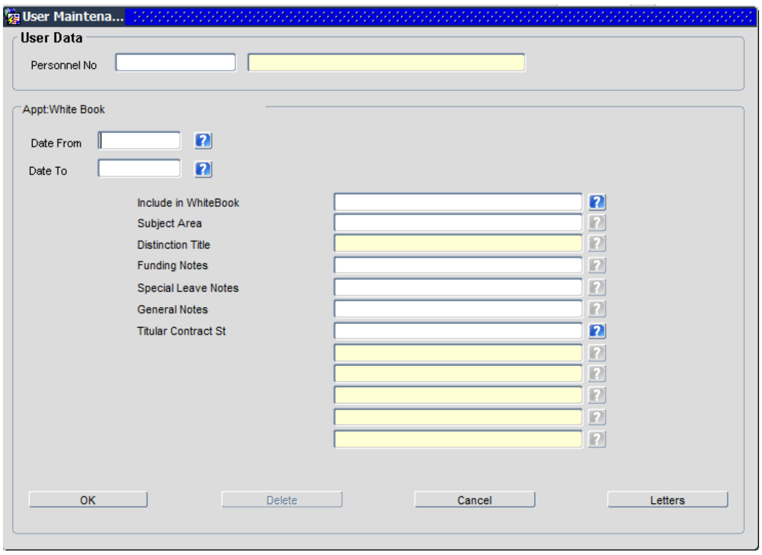
3. If relevant, click into the **Appointment ID** to ensure the correct appointment is highlighted. Click the Appointment Details button. The *Post Appointment Maintenance* window opens.

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

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

6. Select **Appt:White Book**..

7. Click .



8. Complete the fields as necessary:

Field Name (* mandatory)	**Description**
Date From*	Enter the start date of the appointment.
Date To	Leave blank
Include in Whitebook *	Select **Yes** to record that this appointment should appear in the White Book and then ensure the remaining details are provided below.
Subject Area *	Free text field to enter relevant subject area details.
Distinction Title	Leave blank – Refer to **QRG IP12 – Academic title**
Funding/Special Leave/General Notes	Add as appropriate.
Titular Contract Start Date	Enter date distinction title is effective from.

9. When the relevant details have been recorded click . A 'transaction complete' message will appear. Click .

10. Click .

On Arrival

Once the person has arrived, there are a number of further steps that you need to complete.

G. Person-Related Details

Once a new starter has arrived various person-related information must be input to ensure their personnel record is set up correctly.

NOTE: Different address details are held in different areas of CoreHR:

Field Name	Screen	Guidance
Location	Post Appointment Maintenance	• This should be the normal work location/address (or Oxford College) for the post and the default delivery address for payslips. • Payroll must be notified by email or phone if payslips are to be sent to a different address.
Address	Person Profile	• This should be entered on the person homepage (not on the contact details drop down). • Necessary for HMRC purposes and must cover at least two lines. • Remember to tell Payroll if payslip is to go to this address.
Address Label (AddLab)	Person Profile Maintenance > Address Maintenance	• Only complete this if payslips are to go to an address other than the Location or Home Address **and** Payroll have been informed of this requirement.

Note: This information should be completed on the new starter's first day or as soon as possible afterwards. If some of the information is available, it may be captured earlier. Refer also to the **New starter checklist**.

Right to work checks (section G part 5) must be completed BEFORE any work commences.

Navigate to: Personnel > Maintenance > Personal Profile

Search for and open the employee record.

1. Personal details

Confirm personal details are correct/complete e.g. name, home address, gender, date of birth, NI number, etc.

1.1 Check/update the following fields as required:

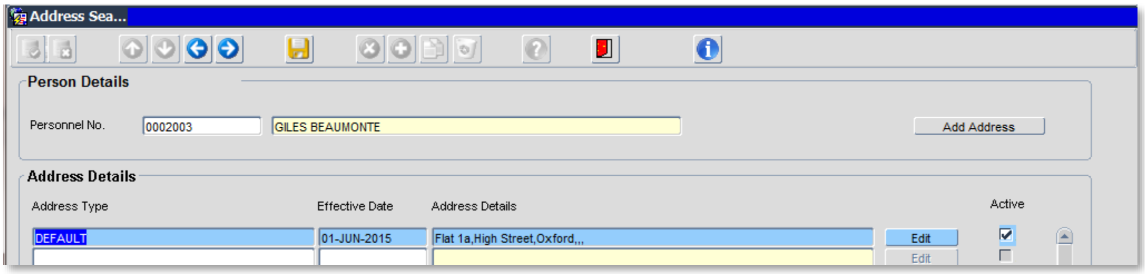
Field Name (* mandatory)	**Guidance**
Forename *	Check/enter first name in full. E.g. Robert not Bob.
Surname *	Enter/check surname.
Middle Name	Enter all middle names in full.
Known As *	First name only. This is the name used in the set-up of the email address. This can be a shortened name if preferred.
Initials	Check initials are for forename and middle names.
Address *	A minimum of two lines must be completed. If for any reason the address is not known this should be noted over two lines i.e., Address Unknown **NB:** This must be entered as soon as possible. The Pension Team have to meet a very strict deadline so it is essential this is done ASAP.
Post Code *	Check this is entered correctly over the two fields – may come through from e-Recruitment as one field.
NI number *	When entering this, if you receive a warning message that the number is a duplicate you should contact HRIS Support.
Phone Number	Enter/check phone number. **NB**: this field should contain **one** valid phone number only. Additional phone numbers should be added via 'contact details' as described in section G part 2 below.
Gender *	Update if necessary – this may come through from e-Recruitment as 'Unknown'.

1.2 Additional address details

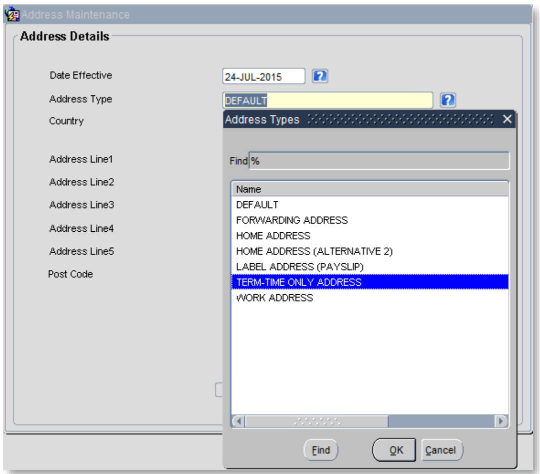
Note: See note on p26 before adding additional address information in this area.

If additional contact details are required these can be added as below:

1.3 Go to **Select Detail** > **Address Maintenance**. The *Address Search* screen opens.

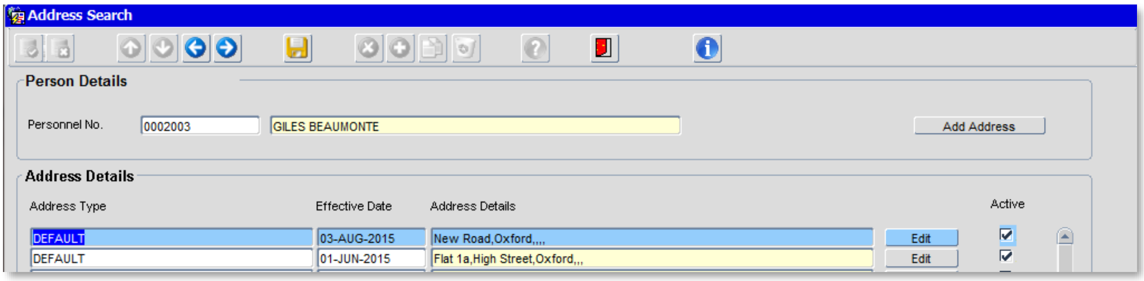


1.4 Click on **Add Address**.



Field Name (*mandatory)	**Description**
Date effective*	Enter the appointment start date or the effective date of the additional address if appropriate.
Address Type*	Select the relevant from the LoV. (Do not leave as 'DEFAULT'). **NB**: even though this field is shaded yellow it must be updated.
Country*	Select from the LoV in ALL cases including UK. **NB**: even though this field is shaded yellow it must be updated.
Address Lines 1 to 5*	Enter full address details. **NB**: 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.
Post Code*	Enter across both fields in alpha numeric format as shown e.g. AA1 1AA.

1.5 Click **OK**. You will be returned to the *Address Search* window. The new address will appear at the top of the list.



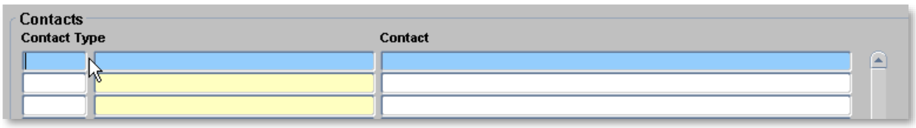
	Note: There should only be an address in **ADDLAB** if payslips are to go to an address other than Location or the Home Address. Payroll must be informed of this requirement.
	If an employee is working overseas it is essential that their address is added in **ADDLAB.** Payroll must be informed.

Note: To add further addresses, click the Add Address button.

2. Additional contact information

2.1 Go to **Select Detail** > **Contacts.** The *contacts screen* opens:

Note: Once they have been generated and interfaces run, SSO, University card details and work e-mail address will be automatically populated here. **Do not manually enter or amend these details.**



To record any additional contact information, e.g. mobile number:

2.2 Click in the **Contact Type** field.

2.3 Click the ? button in the Tool Bar.

2.4 Select the relevant value from the list. Click OK

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

2.6 Click . Repeat if required to add further contact details

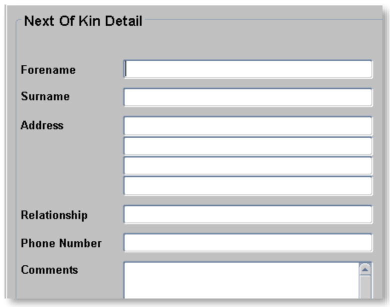
> **Note:** It is important to create a new contact entry for each piece of information. E.g. when recording a home email in addition to a work email, select a new contact line for each email being recorded – do not merge multiple email information onto one line.

3. Next of kin (emergency contact)

3.1 Go to **Select Detail** box > **Next of Kin**.

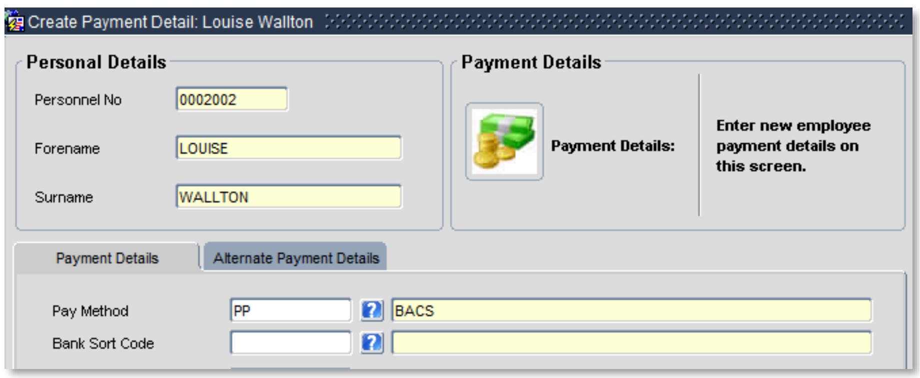
3.2 Enter next of kin information as required.

3.3 **Comments**: If required, details of a second emergency contact can be stored here. Click .



4. Bank details

4.1 Go to **Select Detail** > **Bank Details**:



4.2 Select **Pay Method**: BACS.

4.3 Enter **Bank Sort Code**, Press **Tab** (bank name/address is auto-populated).

> **Note**: If the sort code begins with a 0 you do not need to enter it e.g. 012345 should be entered as 12345.

4.4 Enter Bank Account No (and Building Society Ref if relevant). Click .

> **Note**: **Do not** enter any alternative payment details. This has a payroll impact and anything in these fields will be removed by the payroll team.

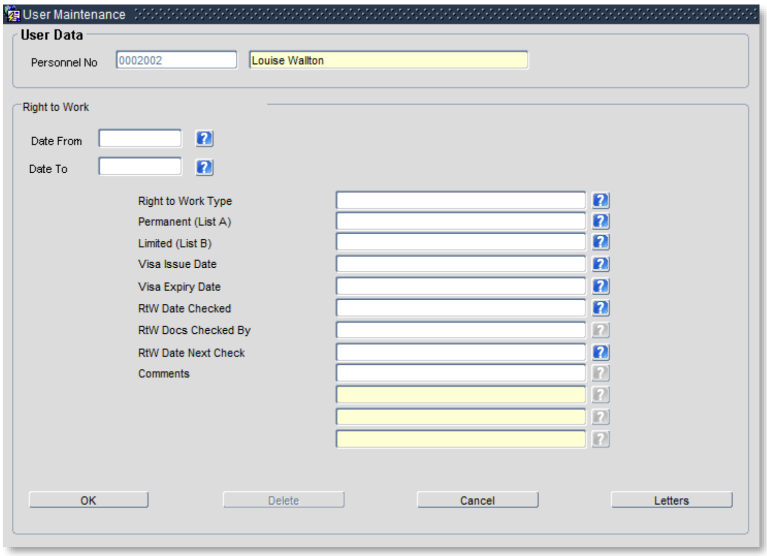
4.5 Click Save and OK.

5. Right to work

> **Note:** It is essential that these checks are completed **BEFORE** any work commences. It is recommended these are carried out as part of the pre-employment checks. Refer also **QRG: PA10_Maintaining Right to Work Data**.

5.1 Go to **Select Detail** > **Right to Work**.

5.2 Click New - the Right to Work screen opens:



5.3 Complete the fields as below:

Field Name (mandatory*)	**Description**
Date From*	Enter the date on which the original documents were checked (as per the date on the copy documents).
Date To	Leave blank
Right to Work Type*	Select either List A, List B, working overseas or N/A started pre 27/01/1997 (as appropriate). Complete additional fields as described below:
Permanent (List A)	**If** evidence provided is from List A, select the relevant document from the ?, otherwise leave blank.
Limited (List B)	**If** evidence provided is from List B, select the relevant document from the ?, otherwise leave blank.
Visa Issue Date	If applicable, select/enter the visa issue date normally listed as 'Issued:' 'Date of Issue:' or 'Valid from'.
Visa Expiry Date	If applicable, select/enter the date on which the visa is due to expire.
RtW Date Checked*	Select/enter the date on which the original documentation was checked (as per the date on the copy documents) – should match "Date From" field.
RtW Docs Checked By *	Enter the full name of the individual who undertook the check – i.e. who verified and copied the original documents.
RtW Date Next Check	Complete for List B only. Select/enter the date the repeat check is due (NB this should be at least one month before the visa/document expires).
Comments	Use this field to enter any comments relevant to the individual circumstances; for example individual has applied for a [type of visa] visa on [date] and application is currently outstanding, or for Tier 4 visa holder, detail term dates.

5.4 Click OK, then OK then Close.

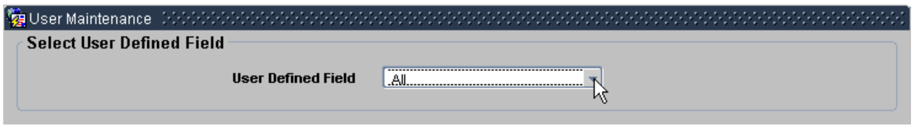
H. Other Details (Person-Based)

Other important details must be recorded including:

- New starter additional details (Pension and tax documents).
- Previous HEI Employment (previous employment at a HEI, critical for HESA purposes).
- Roles within Department (e.g. Head of Department) – if relevant.

For each of these:

1. Go to **Select Details** box > **Other Person Details.** The *User Maintenance* window opens:

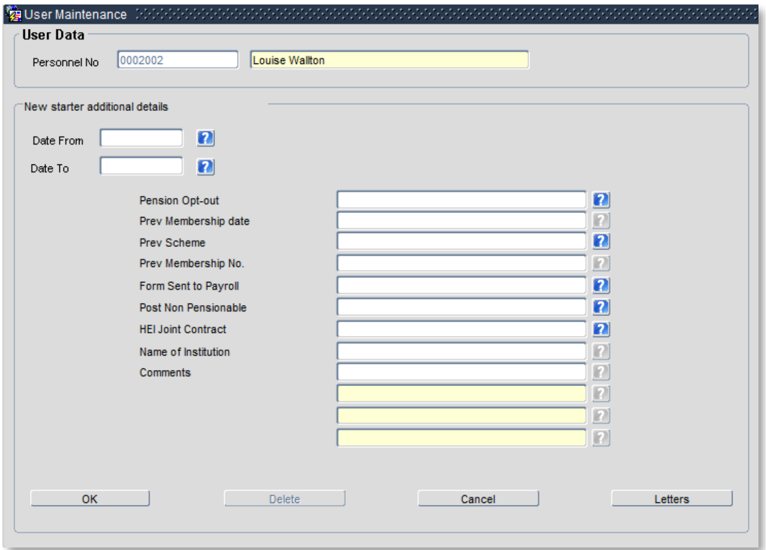


2. Click to display **User Defined Field** List of Values and select the required option/s.

1. Select New Starter Additional Details

1.1 Click 

.

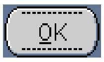


1.2 Complete the fields as below:

Field Name (* mandatory)	**Guidance**
Date From*	Appointment start date
Date To	Leave blank
Pension Opt-out	Do not use
Prev Membership date	Enter the last date of membership.
Previous Scheme	If relevant, select the scheme the new starter has previously been in.
Prev Membership no.	Enter the relevant membership number.
Post Non Pensionable	Leave blank
Form Sent to Payroll	Select the relevant documents sent to Payroll, e.g. P45 or P46 (or equivalent).

	Note: It is important that these documents are sent promptly to Payroll so the Payroll team knows what tax code to use – essential now that data must be submitted monthly to HMRC.
HEI Joint contract *	Select Yes or No as relevant.
Name of institution *	Enter the name of the other HEI if another UK HEI is involved in the contract. This does not include Oxford Colleges.
Comments	Add any additional notes for Payroll/Pensions as required.

1.3 Click 

, then 

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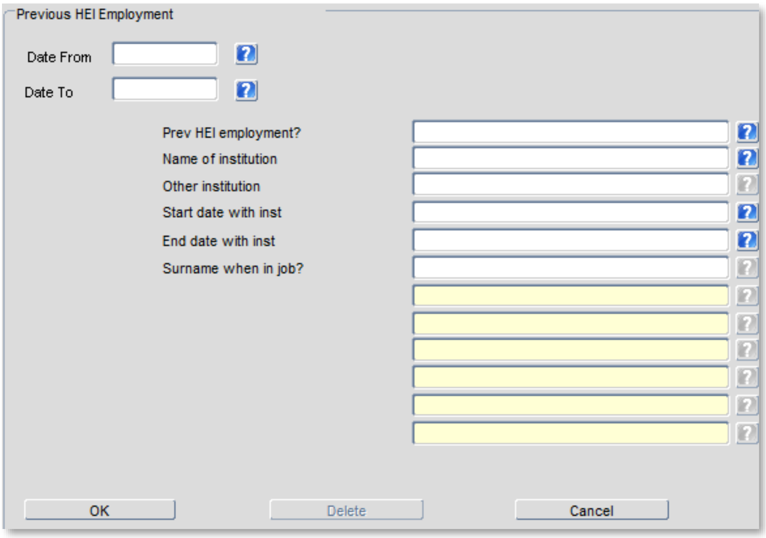
Before an individual is set up on payroll it is important to ensure that the correct tax documents have been received. **Note**: If the individual does not have the correct documents you can download and print copies of the new *Starter Checklist* from the HMRC pages (replaced P46). For a reference guide to all the HMRC forms, please refer to the Payroll Management pages on the Finance Division Website.

It is important that you enter the pension details if the employee was a member of the NHS pension scheme as this will affect the new scheme the employee is entered into. **Note:** If you are entering pension information for an NHS membership after the salary has been approved by the department/ division, please email linda.howse@admin.ox.ac.uk.

2. ♦ Select Previous HEI Employment

> **NOTE**: Even if an individual has never worked at a HEI it is still important to complete this section and select **NO** for **Prev HEI employment?**

2.1 Click New.



Field Name (* mandatory)	**Guidance**
Date From*	Appointment start date
Date To	Leave blank
Prev HEI employment?* NB: does not include University of Oxford	Yes/No (see note below)
If **No**, click on OK to save and exit. If **Yes** complete the following fields:	
Name of Institution	Select from the list
Start date with inst	Enter/select date as applicable in the format DD-MMM-YYYY
End date with inst	Enter/select date as applicable in the format DD-MMM-YYYY

> **NB**: Oxford and Cambridge colleges are not classed as Higher Education Institutions in the UK for HESA purposes.
> If a college or other institution is not included in the 'Name of Institution' list the 'Prev HEI employment?' field should be recorded as 'N'.

2.2 Click OK, then OK.

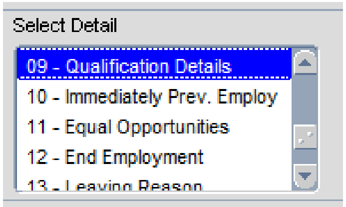
I. Log Qualifications, Academic Disciplines and Immediately Previous Employment

To complete a new starter's personnel record, qualification, academic discipline and employment history details should be entered into Core Personnel. Much of this data is required to support the University's internal and external reporting obligations.

Note: For new starters who applied through e-Recruitment where the vacancy used the long application form, the qualification and immediately previous employment details will be fed through from the application form.
For rehires/ transfers **do not enter qualification/employment details again** if they are already there from the previous appointment, but update where necessary.

1. ♦ Qualification details

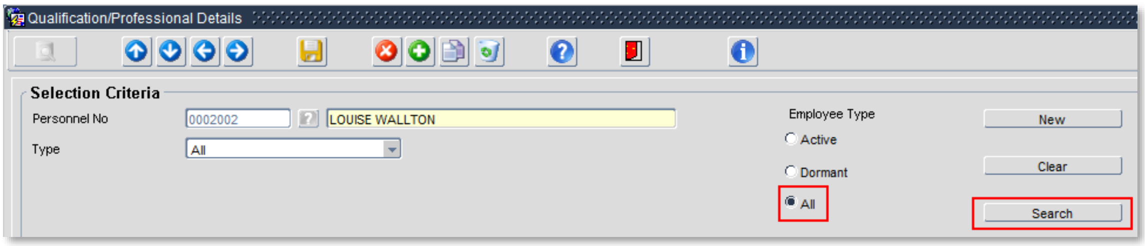
If these have been fed through from the application form they should be checked for completeness.



Highest qualification details must be entered; others can be input in accordance with local requirements.

Navigate to: Personnel > Maintenance > Personal profile

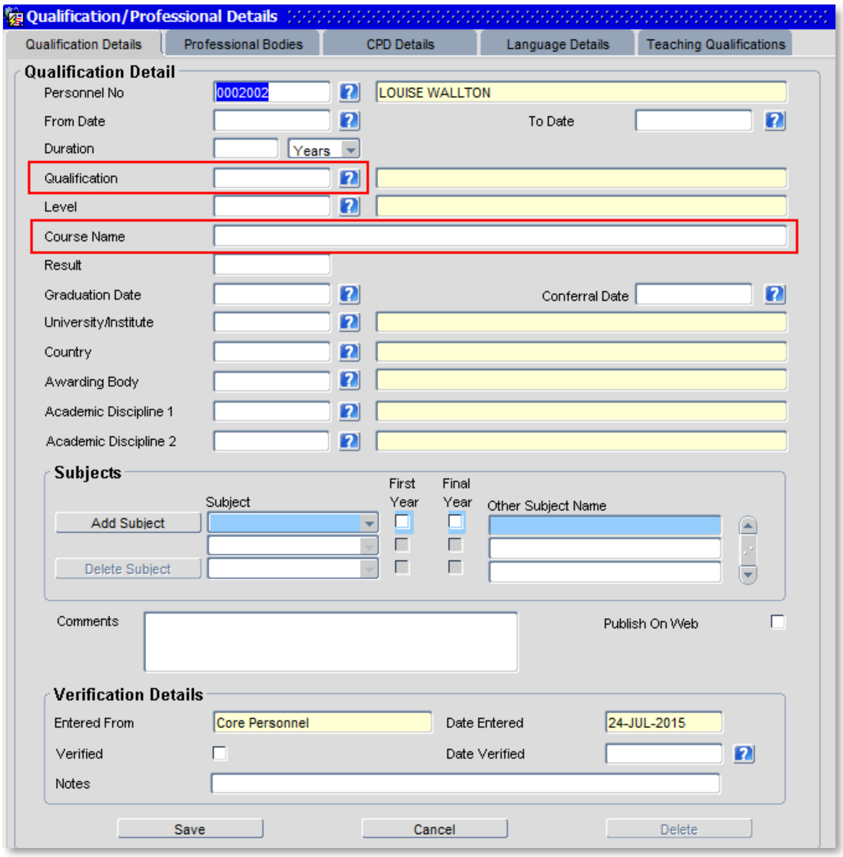
1.1 Go to Select Detail box > Qualification Details.



1.2 Ensure the search is set to **All** – any qualifications already captured will be shown in the **Search Results** area.

Note: The system may display a message stating that the employee has no qualification records, click on **OK** to acknowledge the message.

1.3 Click the New button. The *Qualification/Professional* details window opens:



1.4 Enter details into all the fields as below:

Field Name (* mandatory)	**Description**
Qualification*	Select from . As noted above, **highest qualification details must be entered**; others can be input in accordance with local requirements.
Course Name *	Enter **name of course (subject) and level**, e.g. NVQ Level 2, BA (Hons) Business Studies.

Try to fit the qualification into other categories from the 'Qualification' box before choosing 'PROF' or 'NVQV'. If choosing 'PROF' or 'NVQV' please provide enough detail in the 'Course Name' box for us to identify **the national level of the qualification**.
For context, see the HESA website for the requirements for this information.

When completing the **'Course Name'** please note that we need the level of the qualification in terms of how this compares to other national qualifications, as well as the course name.

1.5 If preferred, enter any other details of note e.g. Graduation Date.

1.6 Click Save

2. ♦ Academic teaching and/or research subjects

For individuals with a current teaching/research role, i.e. where the Core appointment **Category** is 1, 2 or 3 then an additional entry **<u>must</u>** be created for HESA staff return purposes.

2.1. Repeat steps **1.1-1.3** above

2.2. Enter details into all the fields as below:

Field Name (* mandatory)	**Description**
Qualification*	Select **HESA** from the list of values by typing 'HESA' after the '%' and clicking on the 'Find' button. (If you expand the window you will see the Qualification is 'Aca.Disc taught/researched' and the Code is 'HESA').
Course Name *	Leave blank.
Academic Discipline 1*	Select academic discipline relevant to the subject area(s) being taught and/or researched. If the exact subject is highly specialised or is not listed, select the nearest appropriate match, e.g. 'Evidence-Based Social Intervention' could be classed as 'Social Work'.
Academic Discipline 2	If more than one academic discipline select as above.
Academic Discipline 3	If more than two academic disciplines select as above.
Comments	If none of the options in **Academic Discipline 1** are appropriate after attempting to assign it to the nearest match, enter the full description here. **NB:** This should be a last resort. Before entering anything here refer to the job text, job description or consult with the employee/manager to see if a match can be found in **Academic Discipline 1.**

2.3. Click Save.

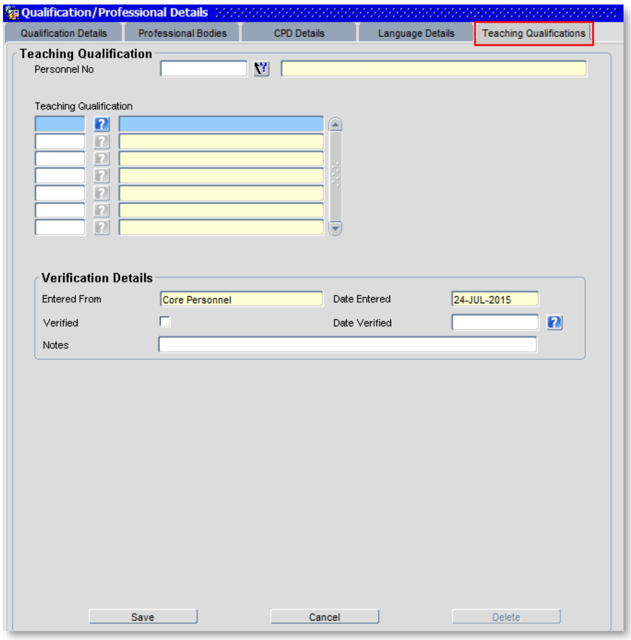
3. ♦ Academic teaching qualifications

For new starters who have teaching as all or part of their contract, i.e. where the Core appointment **Category** is 1 or 3 then details of <u>all</u> their teaching qualifications must be recorded, including where no qualification is held.

3.1. Click on the Teaching Qualifications tab:

3.2. Enter Personnel number or click on the and search by name to find the individual.

3.3. Select the appropriate option(s) from the Teaching Qualification list of values. Note: The Verification section does not need to be completed, but can be if required locally.



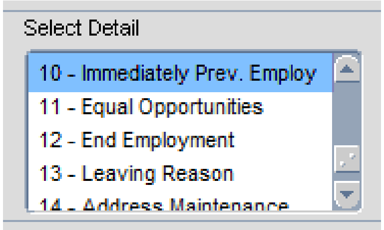
3.4. Click Save.

3.5. to return to the Person Profile Maintenance screen.

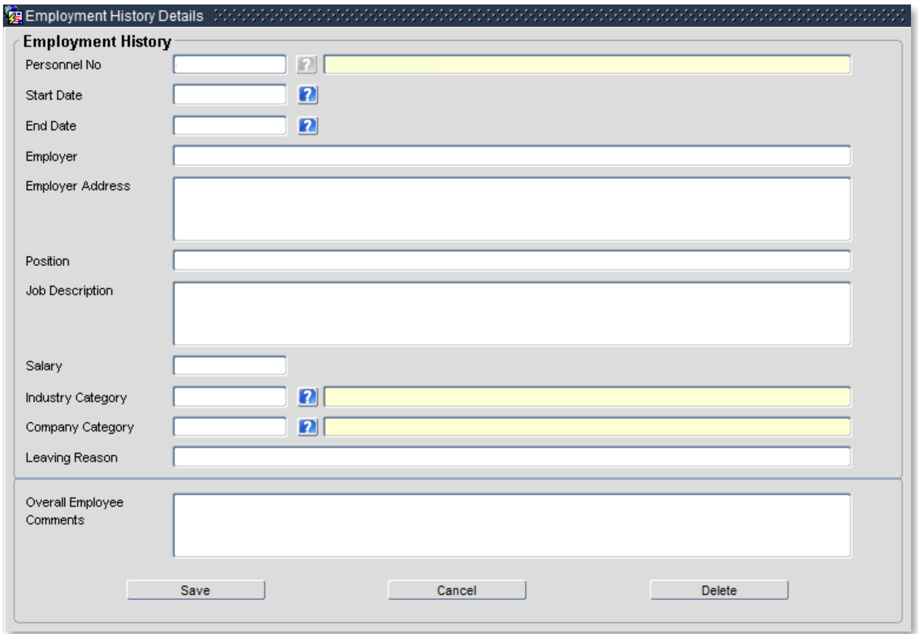
4. ♦ Employment history details

For details that have been fed through from the application form, follow point **4.7** onwards below.

4.1 Go to Select Detail box > Immediately Prev. Employ.



4.2 Click New . The *Employment history* details window opens:



Details given here should cover what the individual was doing immediately before being employed by the University whether it be in paid employment or not, e.g. student, unemployed etc. A small break between appointments, eg a holiday can be ignored.
Note: Do not forget, you will separately need to indicate whether or not the individual has ever worked for another HEI (see Section G part b).

4.3 Enter **Personnel number** or click on the button and search by entering name and clicking **Find**.

4.4 Enter details as below:

Note: Details must be completed whether the employment was in the UK or overseas.

Field Name (* mandatory)	**Description**
Start Date *	Start date of most recent activity/employment.

End Date *	End date of most recent activity/employment. Do not leave this blank. If you do not know the end date from the most recent activity/employment enter the day before the University contract start date.
Employer *	Name of organisation where the individual was employed or carried out the activity. Enter *n/a* if not working/student/volunteer.
Position *	Complete as applicable, or enter student/volunteer as appropriate. Enter *n/a* if not working/student/volunteer.
Industry Category *	Pick from list of values available.
Company Category *	If the previous employer was a UK HEI, pick the University name from the list. Do NOT complete this field if the individual was a student at an Oxford college or another HEI. Please refer to the Previous Employment guidance table on the [immediately previous employment](#) pages of the HR Analytics team website.

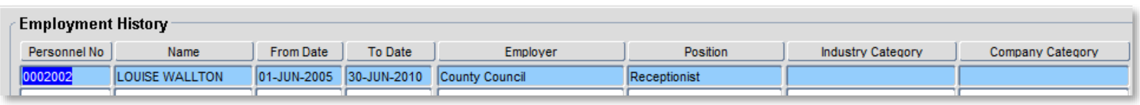
4.5 Enter any other details of interest e.g. **Leaving Reason**.

4.6 Click Save. to return to the *Person Profile Maintenance* screen.

For details that have been fed through from an application form:

4.7 Go to Select Detail box > Immediately Prev. Employ.

4.8 The details entered onto the application form are shown in the Employment History section.



Employment History

Personnel No	Name	From Date	To Date	Employer	Position	Industry Category	Company Category
0002002	LOUISE WALLTON	01-JUN-2005	30-JUN-2010	County Council	Receptionist		

4.9 Select (double click) the entry that is immediately previous to their appointment at the University.

> **Note:** If there is no immediately previous entry, follow the guidance from **4.1** above to add a new entry to the list.

4.10 Complete the details as below:

Field Name (* mandatory)	**Description**
Industry Category *	Pick from list of values available.
Company Category *	If the previous employer was a UK HEI, pick the University name from the list. Do NOT complete this field if the individual was a student at another HEI. **Note:** Only code the most recent employment history entry with Industry and Category code.

4.11 Enter any other details of interest e.g. **Leaving Reason**.

4.12 Click Save, to return to the *Person Profile Maintenance* screen.

J. ♦ NHS Contract Details & Qualifications

This section should only be completed where the appointment is held in a department that is linked to a HEFCE cost centre **and** where the category for the appointment is 1 (teaching only), 2 (research only) or 3 (teaching and research).
Steps 1 – 3 below will help you to determine which guidance to follow.

1. Is your department linked to one of the following HEFCE cost centres?: 101 Clinical medicine; 106 Anatomy & physiology; 107 Pharmacy & Pharmacology; 112 Biosciences; 127 Anthropology & development studies; 131 Social work & social policy.

If you are unsure, please refer to the University's organisation chart to check the HESA Cost Centre.

No → **Go to section K 'Set probation dates'**

Yes ↓ **Continue**

2. Is the category for the appointment 1, 2 or 3?

No → **Go to section K 'Set probation dates'**

Yes ↓ **Continue**

3. Does the appointee have an NHS contract or an honorary NHS contract?

No → **Go to section 3a**

Yes ➡ **Go to section 3b**

Section 3a:
Dept. is linked to a HEFCE cost centre **AND**
the category on the appointment is 1, 2 or 3 **AND**
the appointee does NOT have an NHS contract or honorary NHS contract

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

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

iii. Select Appt: NHS Contract Details.

iv. Click 

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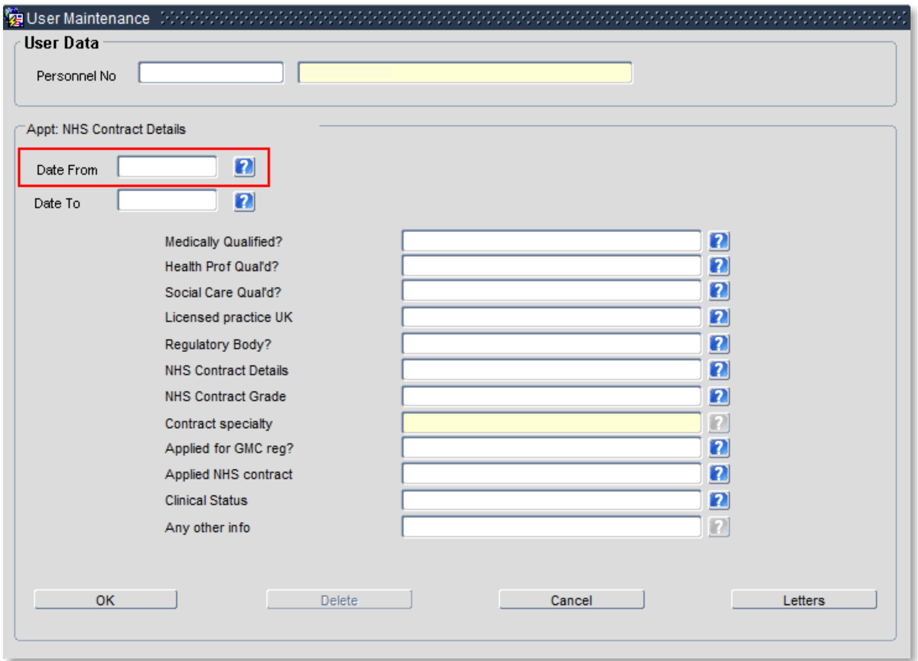


v. Complete the fields as follows:

Field Name (* mandatory)	**Description**
Date From	Enter the appointment start date.
Date to	Leave blank
Clinical Status	0 Not Clinical academic

vi. When the details have been recorded click OK. A 'transaction complete' message will appear. Click OK.

vii. Go to section K 'Set probation dates'

Section 3b
Dept. is linked to a HEFCE cost centre **AND**
the category on the appointment is 1, 2 or 3 **AND**
the appointee has an NHS contract or an honorary NHS contract.

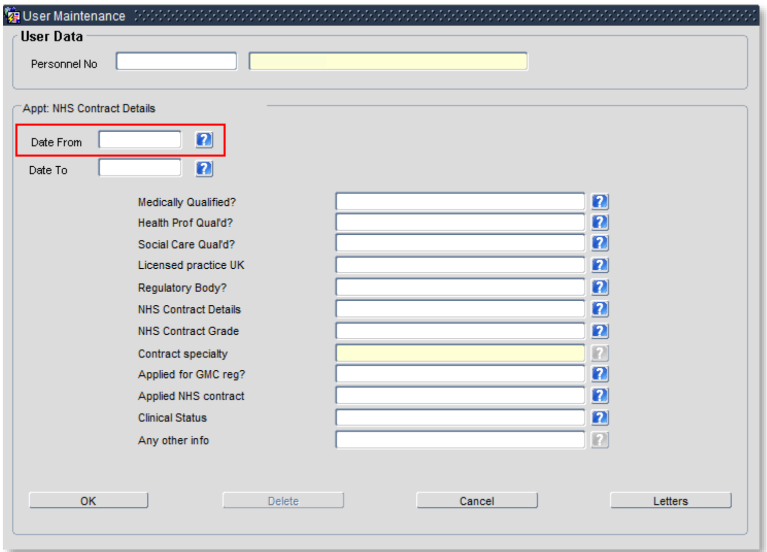
Please refer to the NHS contract data and clinical sub specialty matrix when completing this section. You will need to work through the matrix on Page 1 referring to the more detailed explanations on pages 2 and 3.

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

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

iii. Select Appt: NHS Contract Details.

iv. Click New.



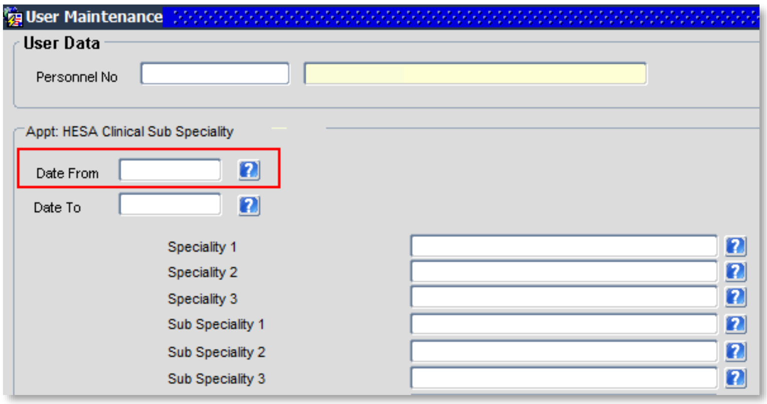
v. Complete the details as relevant:

Field Name (* mandatory)	**Description**
Date From	Enter the appointment start date.
Date to	Leave blank
Medically Qualified?	These fields are no longer in use centrally but may be entered locally if desired.
Health Prof Qual'd?	
Social Care Qual'd?	
Licensed to practice UK	
Regulatory body?	Dependent upon clinical status. Select relevant body with which the employee is registered.
NHS Contract Details	Dependent upon clinical status. Select appropriate NHS contract type. (If no NHS contract, leave blank)
NHS Contract Grade	Dependent upon clinical status. Select appropriate NHS contract grade.
Contract speciality	This field is not in use.
Applied for GMC reg?	These fields are no longer in use centrally but may be entered locally if desired.
Applied NHS contract	
Clinical Status	See Matrix page 1 Select 1, 2, 3 or 4 to indicate whether or not the individual holding this contract also has an NHS contract.
Any other info	This information is no longer required centrally but may be entered locally if desired

vi. When the details have been recorded click [OK]. A 'transaction complete' message will appear. Click [OK].

vii. Select Appt: HESA Clinical Sub Speciality.

viii. Click [New].



ix. Complete the details as relevant:

Field Name (* mandatory)	**Description**
Date From	Enter the appointment start date.
Date to	Leave blank
Speciality1*	Select relevant area of specialty e.g. surgery
Specialty2/3	If employee has more than one specialty, select as appropriate (must not be the same as Specialty1)
Sub Speciality1*	**Mandatory** if Clinical Status is 1, otherwise leave blank Select relevant sub specialty e.g. general surgery (must not be the same as specialty1)
Sub Speciality2/3	If employee has more than one sub specialty, **and** Clinical Status is 1, select as appropriate. Select relevant sub specialty (must not be the same as specialty1 or sub specialty 1/2)

x. When the details have been recorded click 

. A 'transaction complete' message will appear. Click 

.

K. Set probation dates

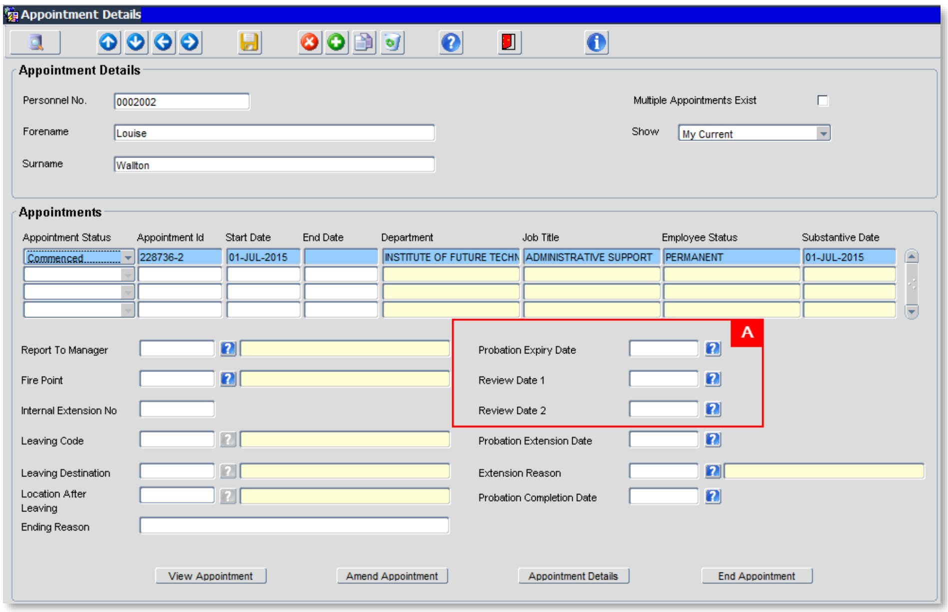
For non-academic appointments, probation dates should be entered as part of the new starter set-up. It is possible to report against these dates for prompting and planning purposes. See the **QRG: IP3_Manage IPO** for academic appointments.

Navigate to: Personnel > Maintenance > Personal Profile

1. Enter search criteria e.g. Name (**Surname** followed by first initial) or **Personnel No**, click 

and open the relevant employee record. The *Personal Profile Maintenance* window opens.

2. Go to **Select Detail** box > **Appointment Details.** The *Appointment Details* window opens:



3. If relevant, click into the **Appointment ID** to ensure the correct appointment is highlighted. Click the Appointment Details button. The *Post Appointment Maintenance* window opens.

4. Enter the appropriate Probation Expiry Date and Review Dates **[A]**:

Field Name (* mandatory)	**Description**
Probation Expiry Date	Date probation is due to end, e.g. 6 months after start date.
Review Date 1/2	Enter the date(s) of mid-probation review(s) as required.

5. Click . Exit all windows back to the Personnel main screen.

L. Appointment-related details

Once a new starter has arrived, various appointment-related information must be added to their personnel record. This guide is separated into a number of sections which should be followed in order.

> **Note:** This information should be completed on the new starter's first day or as soon as possible afterwards. If some of the information is available, it may be captured earlier. Refer also to the **New Starter Checklist**.

Navigate to: Personnel > Maintenance > Personal Profile

1. Enter search criteria e.g. Name (**Surname** followed by first initial) or **Personnel No**, click Search and open the relevant employee record. The *Personal Profile Maintenance* window opens:

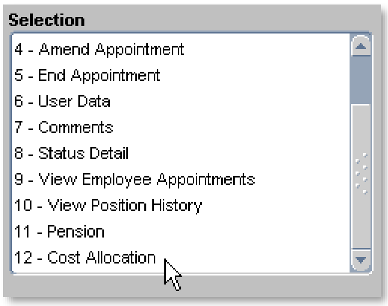
2. Go to **Select Detail** box > **Appointment Details**.

3. If relevant, click into the **Appointment ID** to ensure the correct appointment is highlighted. Click the Appointment Details button. The *Post Appointment Maintenance* window opens.

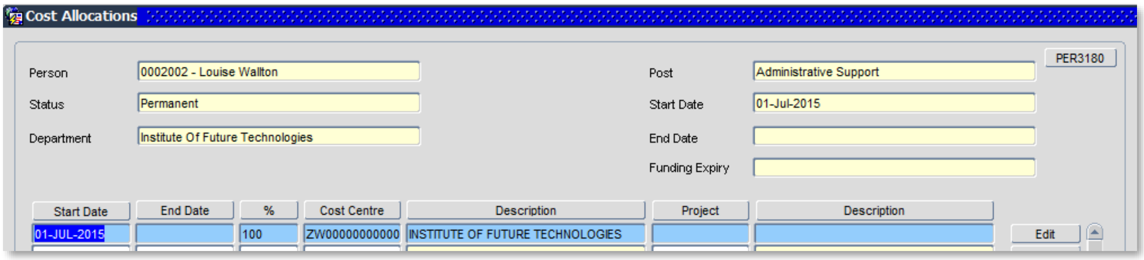
4. Cost allocations

If you did not review the funding/cost details when you appointed the new starter or they have changed in the meantime you should update them at this stage.

4.1 Go to **Selection** box > **Cost Allocation**.



4.2 Review the cost information against the appointment. If necessary click on Edit to amend the details or Add Allocation to add a new cost allocation line.



4.3 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.

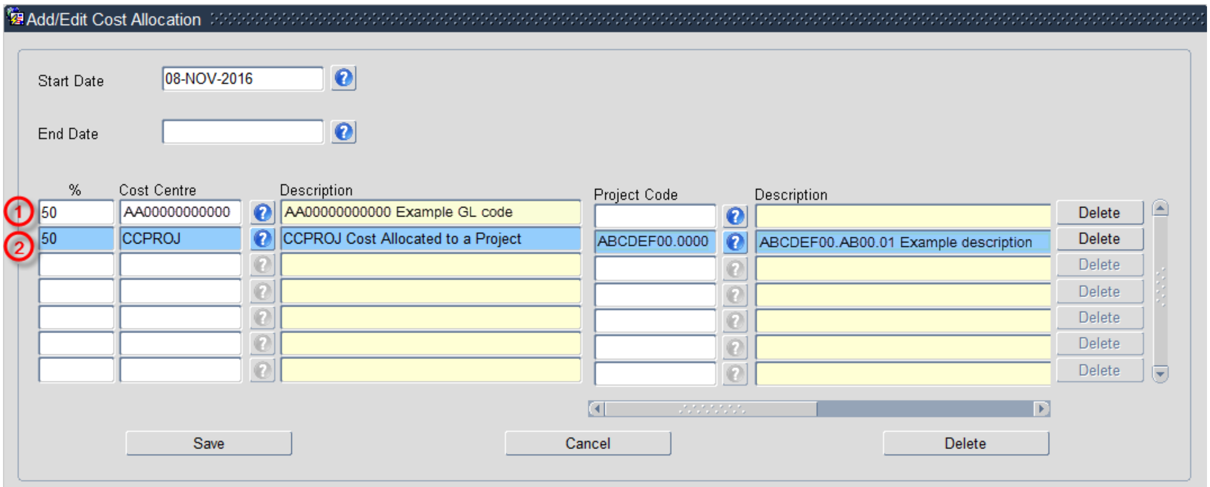
Cost Centre *	*(For each line entered)* If the salary is being paid from a project, select or enter 'CCPROJ'. If the salary is being paid from a GL cost centre, select/enter the relevant GL code in the format AA999999999 where AA is the 2 digit department code. *See row 1 in the example below*.
Project 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.*
Expense	Do not use

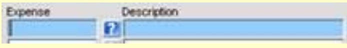
Notes:
You can type the cost centre straight in, but it must be in upper case.
Always use the search function when entering a project code(s)
When searching, the name/description is displayed in the first column in the search results; scroll right to view the codes.

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**.



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.

4.4 Click  then . You are returned to the *Cost Allocations* window.

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

5. Additional funding information

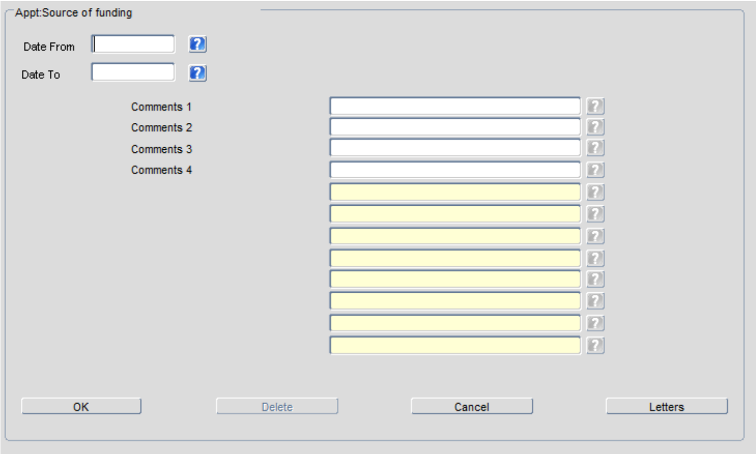
Where the cost centre code does not reflect the source of funds, additional information must be provided. This is important to be able to then define the HESA source of funds. E.g. where a suspense code is being used whilst awaiting a 'true' cost centre to be set up, or where a GL code is being used to administer externally funded appointments.

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

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

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

5.4 Click .



5.5 Complete the source of funding fields as below:

Field Name (* mandatory)	Description
Date From	Enter the start date of the appointment
Date to	Leave blank
Comments 1 through 4	Enter comments regarding funding as required

5.6 Click  . A 'transaction complete' message will appear. Click  .

M. 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.

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

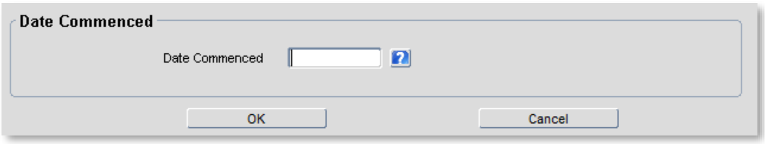
1. Enter search criteria e.g. Name (**Surname** followed by first initial) or **Personnel No**, click  and open the relevant employee record. The *Personal Profile Maintenance* window opens:

2. Go to **Select Detail** box > **Appointment Details**.

3. Click into the **Appointment ID** to ensure the correct appointment is highlighted. Click the 

button. The *Post Appointment Maintenance* window opens.

4. Go to **Selection** box > **Commence Appointment**.



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

> **Note:** If the actual start date is later than the 'appointed' date, enter the revised date here and the effective date will automatically be updated. If the actual start date is earlier than the 'appointed' date, contact the HRIS support centre to amend the date **before** you commence the individual.

6. Click 

. Click  then 

.

7. Finally, go to **Selection** box > **View Position History** to check that the salary details are all as expected.

> **Note:** If the salary has not been set up correctly, the salary line will need to be rejected by the department pay approver and re-entered. Refer to **QRG: CH5_Change: Pay** for guidance.

N. Set Up Allowances

Where allowances (e.g. for callout, clothing, etc.) are required they will need to be set up and approved within the CoreHR system. Approvers should refer to **Section F** or **QRG: FD5_Approve/Reject Salary/Allowances** for guidance on approving.

Note: Off-system approval for certain allowances (see the *Allowance Guide* document for more details) must continue to be sought from the Reward Team before they are set up in the CoreHR system.

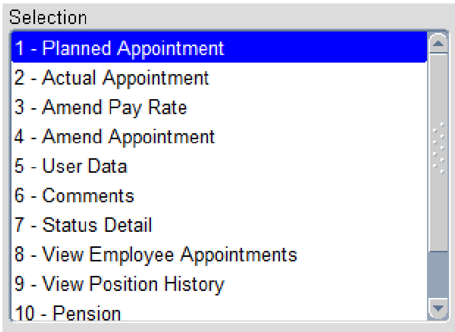
NOTE: An Appointment must have a status of **Commenced** before Allowances may be set up.

Navigate to: Personnel > Maintenance > Personal Profile

1. If already in the *Post Appointment Maintenance* window go to step 4, if not, enter search criteria e.g. Name (**Surname** followed by first initial) or **Personnel No**, click Search and open the relevant employee record. The *Personal Profile Maintenance* window opens:

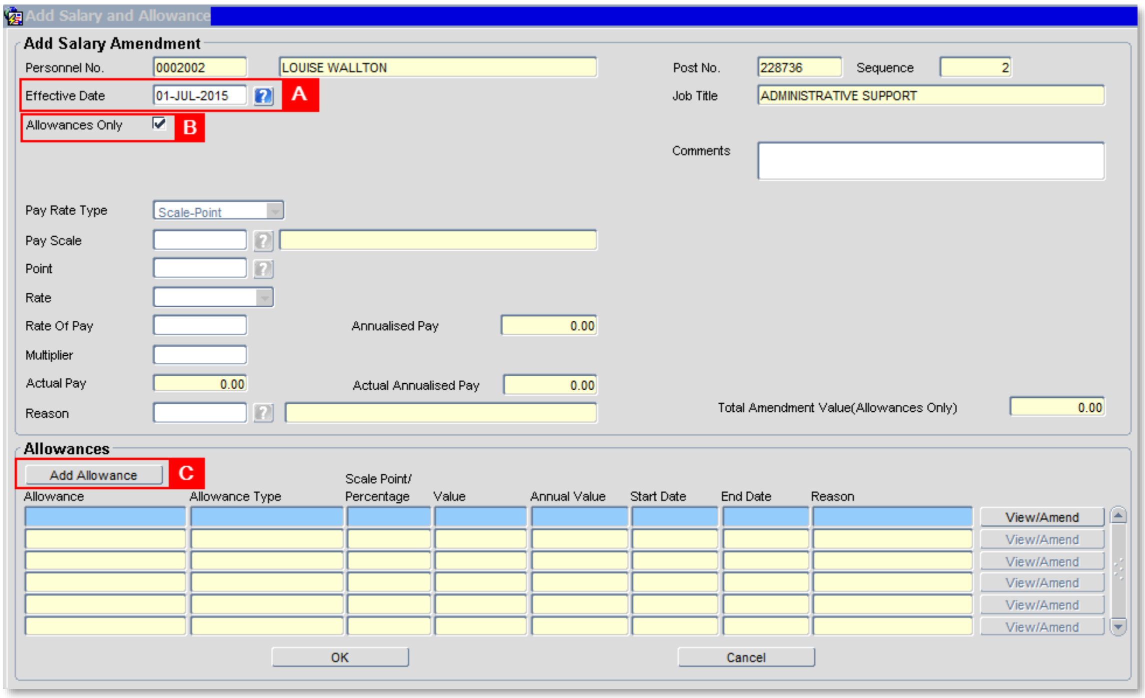
2. Go to **Select Detail** box > **Appointment Details.** The *Appointment Details* window opens.

3. If relevant, click into the **Appointment ID** to ensure the correct appointment is highlighted. Click the Appointment Details button. The *Post Appointment Maintenance* window opens.



4. Go to **Selection** > **Amend Pay Rate**.

The *Add Salary and Allowance* window opens:



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

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

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

8. Complete the *Allowance Details* screen as below.

> ⚠ For fields marked ■ below - depending on the allowance selected either Scale Point, Percentage or Value will be used. See the *Allowance Guide* for more information.

Field Name (* mandatory)	**Description**
Allowance *	Select the relevant value from the list, e.g. Standby and call out pay cash.
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 ■	If relevant, select Scale point, this will relate to a rate table.
Percentage ■	If relevant, enter % to be applied.
Value ■	If relevant, enter the value of the allowance, e.g., 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 and salary multiplier.
Cost Centre *	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 *	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	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 referring to the table in Appendix A in **QRG: CH4_New and changes to permanent allowances**.
Reference	No longer in use. References entered previously will still be displayed.

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

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

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

12. 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.

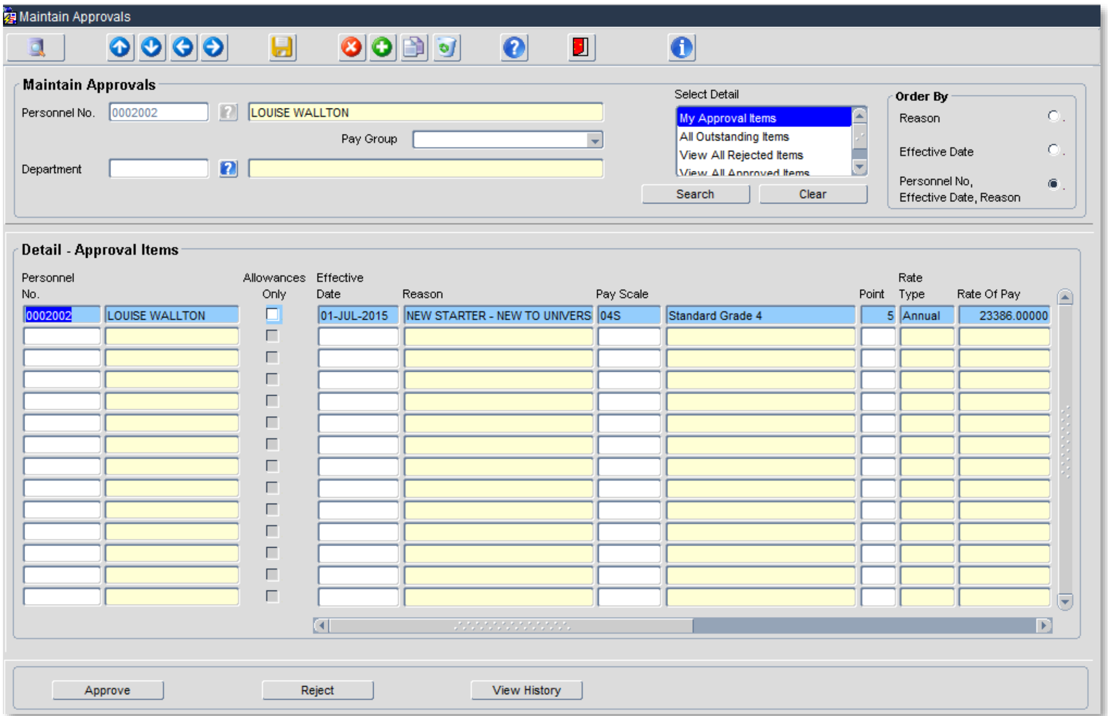
O. Approve (or Reject) Salary/Allowances

All salary and allowance additions and changes must be approved within your department before they are actioned by payroll.

> **NOTE:** When a Salary Approver logs onto CoreHR, a message displays to indicate if there are any Salary /Allowances awaiting approval.
> *Approve Salary Amendments?* Click on the link to go directly to the *Maintain Approvals* window. Alternatively, navigate as below.

Personnel>Maintenance>Salary Administration> Maintain Salary Approvals

1. The Maintain Approvals window defaults to **My Approval Items**.



2. The list of items awaiting approval includes:

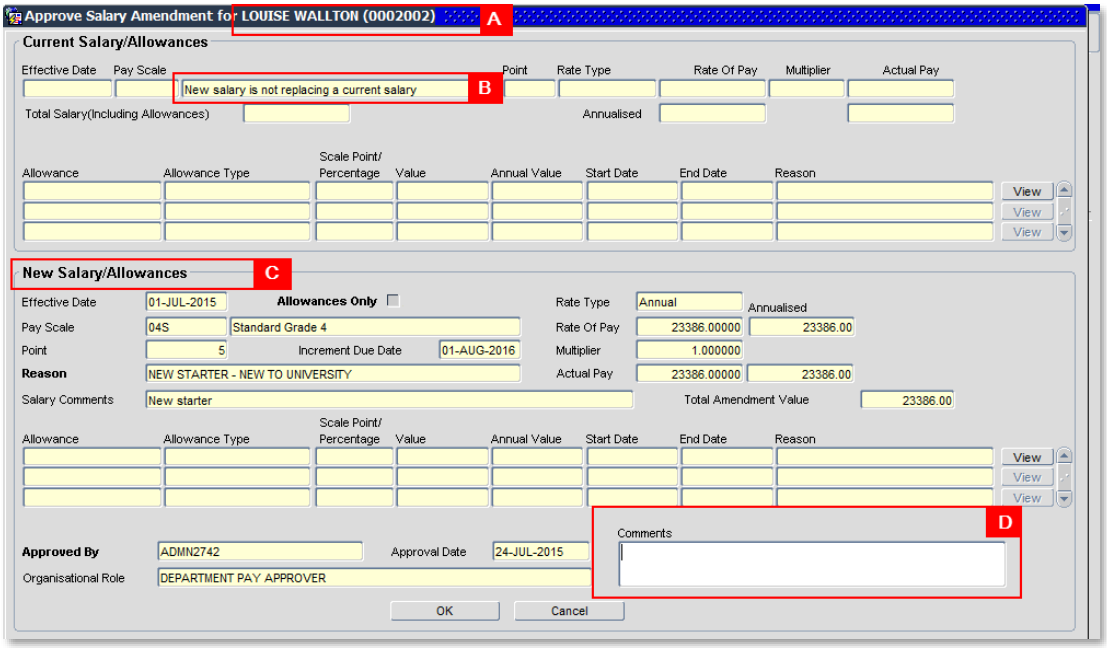
3. Salary Approvals and Allowances (if set up at the same time)

4. Allowances only (indicated by the tick box **Allowances Only**)

5. Select the relevant employee entry and click the 

button (or reject).

The Approve Salary Amendments window opens:



Note: The name of the employee and their personnel number are shown in the header **[A]**.

The *Approve Salary Amendment* window is divided into two sections:

- **Current Salary Allowances [B].** The Total Salary (including Allowances) field for a new starter is normally zero.
- New Salary/Allowances **[C].**

6. Check the New Salary/Allowances data is correct:

Field Name (* mandatory)	**Description**
Effective date *	Date new rate of pay expected to start from.
Pay scale *	Grade.
Point *	Point on grade.
Rate of Pay *	FTE salary associated with the grade and point.
Multiplier *	Value used to calculate the actual salary to be paid. Normally relates to FTE, but may be adjusted to allow for half-pay or no-pay situations.
Actual Pay *	Actual salary once multiplier has been taken into account.
Reason *	Reason for the change in salary.
Salary comments *	Note for salary approver.
Allowance *	Name of allowance.
Allowance type *	Variable value, Scaled or Variable Percentage as appropriate for the specific allowance.

Scale point/percentage *	Either scale or percentage depending on the allowances type.
Value *	Generally £s, but could be days or hours.
Annual Value *	Value multiplied up to annual equivalent, assuming it is continued for that long.
Start date *	Start date for the allowance.
End date *	End date for the allowance.
Reason *	Reason for the change in allowances.

7. If required, click the button to see more details of the costings related to an allowance.

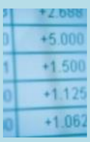
8. Add any approval notes or reason for rejection in **Comments** **[D]**.

Note: If you have rejected a salary or allowance it is important to make separate contact with full details to notify the requestor of the reason for the rejection as this will not be visible to them in CoreHR.

9. Click OK. A message appears asking you if you are sure you want to approve/ reject this salary amendment. Click Yes. The *Approve Salary Amendments* window closes.

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

NEXT STEPS: For **direct appoints only** you should give your new starter a *Staff Starter Form*. You should impress on them the importance of providing this information.
In the first few weeks the new starter will probably undergo some induction training. Refer to **QRG: IP1_Record Induction** for guidance.



Useful Reports: To help track new appointments don't forget to regularly run:
PERDEP42 Pre-Employment Checks
PERDEP20 Monthly Personnel changes
HRINFO01 Data Quality Validation

If required, white book data can be extracted via:
PERDEP09 Academic Staff Listing (Whitebook)