

STAFF REQUEST AND CONTRACT DECISION MATRIX

Change type		Context	Raise Staff request	Create New / Create From Post	Staff Request Position type	Staff Request Additional info	Staff Request Approval comments	Document to issue	Amend app't	New post	New planned app't	Use vacancy
New Post	1	Brand new post.	Y	Create New Request	New post - new JD/generic/generic (amended)	Context, JD	Protocol no.	Cover letter & contract*		Y	Y	Y
	1a	New post: TUPE transfer.	CONTACT YOUR HR BUSINESS PARTNER FOR GUIDANCE									
	2	Copy of existing post with exactly the same attributes.	Y	Create Request From Post	New post - duplicate	Context, grading reference no	Protocol no.	Cover letter & contract*		Y	Y	Y
	3	Refill/replacement of leaver with exactly the same attributes.	Y	Create Request From Post	Replacement/refill	Context, grading reference no	Protocol no.	Cover letter & contract*		N	Y	Y
	4	Refill/replacement of leaver, where grade of post is different from that of post it is replacing.	Y	Create Request From Post	New post - new JD/generic/generic (amended)	Context, grading reference no	Protocol no.	Cover letter & contract*		Y	Y	Y
	4a	Refill/replacement of leaver, where post type (permanent, fixed term etc) is different from that of post it is replacing.	Y	Create New Request	New post - new JD/generic/generic (amended)	Context, grading reference no	Protocol no.	Cover letter & contract*		Y	Y	Y
	5	Back-fill e.g. secondment, maternity cover or other long term absence (except where covered by casual or agency staff) with exactly the same attributes.	Y	Create Request From Post	Replacement/refill	Context, grading reference no	Protocol no.	Cover letter & contract*		N	Y	Y
	6	Back-fill e.g. secondment, maternity cover or other long term absence (except where covered by casual or agency staff) where grade of post is different from that of post it is replacing.	Y	Create Request From Post	New post - new JD/generic/generic (amended)	Context, grading reference no	Protocol no.	Cover letter & contract*		Y	Y	Y
	7	Apprenticeship	Y	Create New Request	New post - new JD/generic/generic (amended)	Context, grading reference no	Protocol no.	Cover letter & contract*		Y	Y	Y
	9	Casual worker	N (auto-authorise bucket post)					Letter of engagement		N	N	N
	10	Casual teaching <12 weeks						Casual teaching contract for services		N	N	N
10a	Casual teaching >12 weeks								N	N	N	
11	Agency staff/non-employee						None		N	N	N	
Underfill	13	Underfill - planned appointment already exists at substantive grade (grades 1-10 only - for all other grades consult the Reward Team).	N (send off-system request to Reward team requesting grade change on planned appointment)					Cover letter & contract*		N	Amend original	N
	13b	Promotion to substantive grade (following initial appointment on underfilling basis)	Y	Create Request From Post	Existing post – contract amendment	Context, grading reference no.	Protocol no.	Cover letter & contract*		N	Y	N
Change in contract type	15	Fixed to permanent/ open ended.	Y	Create New Request	Existing post - new contract	Context		Cover letter & contract*		Y	Y	N
	16	Fixed-hours to variable hours contract.	Y	Create Request From Post	Existing post - new contract	Context		Cover letter & contract*		Y	Y	N
	17	Variable hours to fixed-hours.	Y	Create Request From Post	Existing post - new contract	Context		Cover letter & contract*		Y	Y	N
	18	'Old style' clinical contract (pre-2004) to new clinical contract at new grade.	Y	Create New Request	Existing post - new contract	Context		Cover letter & contract*		Y	Y	N
Change in department	19	Change in department due to organisational restructure (should be processed as a transfer). Major organisation restructures will be handled by Data Services (seek advice from HR Business Partner).	Y	Create New Request	New post - duplicate	Update department structure		Cover letter & contract*		Y	Y	N

* Unless post is filled by an internal secondment, in which case issue a secondment letter.

Note 1: Whenever a new contract is issued to an existing member of staff, a new pensions enrolment action is prompted. Therefore, when issuing a new contract to an existing member of staff, it may be helpful to check whether they are currently in the pension scheme and, if not, to advise them that they will be enrolled from the start of their new contract. They can opt-out again if they wish.

Note 2: Wherever the matrix states to Create New Post, you can use the Copy Staff Request function but you must only copy Staff Requests that were raised using the Create New Post function (i.e. are not linked to an existing post).

Change type		Context	Raise Staff request	Create New / Create From Post	Staff Request Position type	Staff Request Additional info	Staff Request Approval comments	Document to issue	Amend app't	New post	New planned app't	Use vacancy
Change in post	20	Associate Professor Tutorial Fellowship (University) (30S) to/from Associate Professor Without Tutorial Fellowship (36S)	Y	Create New Request	Existing post - new contract	Context		Cover letter & contract*		Y	Y	N
	21	Associate Professor Tutorial Fellowship (College) (39S) to Associate Professor Tutorial Fellowship (University) (30S)	Y	Create New Request	Existing post - new contract	Context		Cover letter & contract*		Y	Y	N
	22	Titular Associate Professorship to Substantive Associate Professorship	Y	Create New Request	Existing post - new contract	Context		Cover letter & contract*		Y	Y	N
Change in source of funding	23	No change to contract end date and no change in project.	N					None	Y	N	N	N
	25	Change in funding with change in project.	Y	Create Request From Post	Existing post - contract amendment	Context		Cover letter & contract*		N	Y	N
	26	With EU rules defining new contract required.	Y	Create Request From Post	Existing post - contract amendment	Context		Cover letter & contract*		N	Y	N
Change of job title	27	Where there is no substantive change to duties/responsibilities.	N					Letter: Change in job title	Y	N	N	N
Change to hours	28	<u>Excludes</u> to/from term time contract to other contract type.	N					Letter: Change in hours	Y	N	N	N
	29	Where moving to/from term time contract from/to other contract type.	Y	Create Request From Post	Existing post - contract amendment	Context		Cover letter & contract*		N	Y	N
Change to normal place of work	30	Change of location within same department.	N					Letter: Change in place of work	Y	N	N	N
Contract extension	31	Where the project and objective remain the same.	N					Letter: Fixed term contract extended	Y	N	N	N
	32	Where the project and/or objective have changed.	Y	Create Request From Post	Existing post - contract amendment	Context		Cover letter & contract*		N	Y	N
Regrading	33	Where existing job has grown to an extent that the grade requires review	Y	Create Request From Post	Regrading	Context, JD, Application form, Org chart		Cover letter & contract*		Y	Y	N
Acting up/additional responsibilities	34	Payment to cover between 4 and 52 weeks, which reflect temporary additional responsibilities.	N					Letters: Additional duties	Y	N	N	N
Post correction	35	Correcting a post (seek advice from HRIS Support before initiating this)	Y	Create New Request	New post - correction	Context why correction is required/what needs changing. Include post number of original incorrect post		Dependant on circumstances. If incorrect letter/contract was previously issued a corrected document will need to be provided.		Y	Y	N
Extending employment beyond the EJRA (always on fixed-term basis)	36	Where there is no change in grade	Y	Create Request From Post	Existing post - new contract	Context, grading reference no	Protocol no.	Cover letter & contract*		Y	Y	N
	37	Where there is a change in grade	Y	Create Request From Post	New post - new JD/generic/generic (amended)	Context, grading reference no	Protocol no.	Cover letter & contract*		Y	Y	N
	38	Where the individual is going into a new job (including where there is a change in dept.)	Y	Create New Request	New post - new JD/generic/generic (amended)	Context, grading reference no	Protocol no.	Cover letter & contract*		Y	Y	N