

Transfer and appointment decision matrix

Please refer to the Staff Immigration Team guidance for Right to Work requirements.			New appointment status						
			Employee with CMS contract *	Casual worker/teacher/examiner	Agency worker	Non-employee (Inc. PSCs)	Temporary Staffing Service	Subsidiary Company (see University org structure)	College (see note 1)
Current appointment status	1	Employee with CMS contract * <i>(including employees at Kellogg and St Cross colleges)</i>	Is the existing appointment to continue? YES - add as additional appointment (PA2b) NO - Transfer to new appointment (PA2e/f)	Does casual appointment start immediately after the CMS contract ends? YES - Create additional appointment and end CMS appointment entering full leaver details (PA11) NO - End the CMS contract entering full leaver details and rehire (PA11) (see note 4)	End current appointment (EA1) Rehire into new agency appointment in following payroll month (PA2d/PA2h) (see note 4)	Does the NonEmp appointment start immediately after the CMS contract ends? YES - Create additional appointment (PA2b/PA2q) Current dept. to end CMS appointment entering full leaver details (EA1) NO - Current dept. to end the CMS contract (EA1) New dept. to rehire as a non-employee (PA2d/PA2q) (see note 4)	Does the TSS appointment start immediately after the CMS contract ends? YES - Create additional appointment (TSS3) Current dept. to end CMS appointment entering full leaver details (EA1) NO - Current dept. to end the CMS contract (EA1) TSS to rehire as a non-employee (TSS3) (see note 4)	Is new appointment in same company? YES - Transfer to new appointment (PA2e/f) NO - Create new starter (PANSO) <i>(this will create duplicate record)</i> End current appointment (EA1)	Is the new appointment in Kellogg or St Cross? YES - Transfer to new appointment (PA2e/f) NO - End existing appointment entering full leaver details (EA1)
	2	Casual worker/teacher/examiner	Is the existing casual appointment to continue? YES - Create additional appointment (PA2b) NO - Final casual payment made? YES - Transfer to new appointment (PA2e/f) NO - Create additional appointment (PA2b) and end current appointment after final payment (EA1) ** see note below	Is the existing casual appointment to continue? YES - Create additional appointment. (PA11) NO - Final casual payment made? YES - Transfer to new appointment (PA11) NO - Create additional appointment and end current appointment after final payment (PA11)	Is the existing casual appointment to continue? YES - Create additional appointment. (PA2b) NO - End current appointment once final payment has been made (EA1) New dept. to rehire into Agency post in following payroll month (PA2d) (see note 4)	Does the NonEmp appointment start immediately after the Casual appointment ends? YES - Create additional appointment (PA2b) and end Casual appointment entering full leaver details (PA11) NO - End casual appointment and to rehire into NonEmp post (PA2d/q) (see note 4)	Is the existing casual appointment to continue? YES - Add as additional appointment (TSS3) NO - Transfer to new appointment (TSS4)	Is new appointment in same company? NO - Create new starter (PANSO) <i>(this will create duplicate record)</i> YES - Is casual appointment to continue? YES - Add as additional appointment (PA2b) NO - Transfer to new appointment (PA2f)	Is the new appointment in Kellogg or St Cross? YES - Transfer to new appointment (PA2e) NO - Is casual appointment to continue? YES - No action required NO - End current appointment (EA1)
	3	Agency worker	Transfer to new appointment (PA2e/f) ** see note below	Is the existing appointment to continue? YES - Add as additional appointment (PA2b) NO - Transfer employee to new casual appointment (PA2e/f) (PA11)	Transfer to new appointment (PA2e/f)	Transfer individual to new appointment (PA2e/f) or create additional as applicable (PA2b)	Transfer individual to new appointment (PA2e/f) or create additional as applicable (PA2b)	Is new appointment in same company? YES - Transfer to new appointment (PA2e/f) NO - Create new starter (PANSO) <i>(this will create duplicate record)</i>	Is the new appointment in Kellogg or St Cross? YES - Transfer to new appointment (PA2e/f) NO - End current appointment (EA1)
	4	Temporary Staffing Service	Transfer to new appointment. (PA2e/f) ** see note below	Is the existing appointment to continue?	End current appointment (EA1)	Transfer individual to new appointment (PA2e/f) or create additional as applicable (PA2b)	Transfer individual to new appointment (PA2e/f) or create additional as applicable (PA2b)	Is new appointment in same company? YES - Transfer to new appointment (PA2e/f) NO - Create new starter (PANSO) <i>(this will create duplicate record)</i>	Is the new appointment in Kellogg or St Cross? YES - Transfer to new appointment (PA2e/f) NO - End current appointment (EA1)
	5	Non-employee (Inc. PSCs)		Is the existing appointment to continue?	Rehire into new agency appointment in following payroll month (PA2d) (see note 4)	Transfer individual to new appointment (PA2e/f)	Transfer individual to new appointment (PA2e/f)	Create new starter (PANSO) <i>(this will create a duplicate record)</i>	Create new starter (PANSO) <i>(this will create a duplicate record)</i>
	6	Marie Curie Student (non-employee)		Transfer individual to new appointment (PA2e/f) (PA11)					
	7	Subsidiary company employee (See University org structure)	Create new starter (PANSO) <i>(this will create duplicate record)</i> ** see note below	Is the existing casual appointment to continue? YES - Transfer to new appointment (PA2e/f) NO - Create new starter (PANSO) (see note 1)	Is agency appointment in same company? YES - Transfer to new appointment (PA2e/f) NO - Create new starter (PANSO) (see note 1)	Is new appointment in same company? YES - Transfer to new appointment (PA2f) NO - Create new starter (PANSO) <i>(this will create duplicate record)</i>	Create new starter (PANSO) <i>(this will create a duplicate record)</i>	Is new appointment in same company? YES - Transfer to new appointment (PA2f) NO - Create new starter (PANSO) <i>(this will create duplicate record)</i>	Create new starter (PANSO) <i>(this will create a duplicate record)</i>

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Current appointment status	8	College employee (See note 1)	Create new starter (PANS0) <i>(this will create duplicate record)</i> ** see note below	Create new starter (PANS0) <i>(this will create duplicate record)</i>	Create new starter (PANS0) <i>(this will create a duplicate record)</i>	Create new starter (PANS0) <i>(this will create a duplicate record)</i>	End current appointment (EA1) Create new starter (PANS0) <i>(this will create a duplicate record)</i>	Create new starter (PANS0) <i>(this will create a duplicate record)</i>	Is new appointment in same College? YES - Transfer to new appointment (PA2e/f) NO - create new starter (PANS0) <i>(This will create a duplicate record)</i> . End current appointment (EA1)
	9	Royalties (dept. ZA)	Royalty payments to continue? YES - Create additional appointment (PA2b) NO - Transfer to new appointment (PA2e/f) ** see note below	Royalty payments to continue? YES - Create additional appointment (PA11) NO - Transfer to new appointment (PA2e/f)	Royalty payments to continue? YES - Create additional appointment (PA2b) NO - End current appointment (EA1) and rehire into new agency appointment (PA2d) (see note 4)	Royalty payments to continue? YES - Create additional appointment (PA2b) NO - Transfer to new appointment (PA2e) <i>(HRIS support centre will need to approve the transfer in the system)</i>	Royalty payments to continue? YES - Create additional appointment (TSS3) NO - Transfer to new appointment (TSS4) <i>(HRIS support centre will need to approve the transfer in the system)</i>	Royalty payments to continue? YES - Create new starter (PANS0) NO - End current appointment (EA1)	Royalty payments to continue? NO - End current appointment (EA1) YES - Is new appointment in Kellogg or St Cross? YES - Add as additional (PA2b) NO - Create new starter (PANS0)
	10	TUPE transfer in	Refer to your HR Business Partner and the HR Analytics team in the first instance. All TUPE transfers are processed in the system by the HRIS Data Service team.						

NOTES

- (1) If the individual is transferring to or from a subsidiary company or one of the following colleges: Linacre, Green Templeton, St Hugh's, a duplicate record **should** be created. These individuals are paid by the University's payroll team who provide a bureau service, their personnel records must be kept separate. Query with the HRIS Support Centre if unsure.
- (2) A list of subsidiary companies can be found on the [University Org chart](#) under 'Subsidiary Companies'.
- (3) If there is anything entered in the Job Category field on the individual's appointment (e.g. Hybrid Terms and Conditions) please refer to your HR Business Partner or the HRIS Support Centre before proceeding.
- (4) HMRC rules for RTI do not permit an employee to be made a leaver and then rehired in the same payroll month. You will need to process the rehire in the following payroll month and backdate the start date.

* **CMS contract: e.g. Permanent, Open-ended, Fixed Term (including employees at Kellogg and St Cross colleges, which are University departments).**

** **Where an individual is transferring to a CMS contract from any another employment type they must complete a new starter data collection form.**