

Casual workers and teachers are not appointed to individual posts but are instead appointed to 'bucket' posts. These bucket posts are auto-authorised which means that a staff request and planned appointment is not required.

What's changed?

Screenshots replaced and table updated following the implementation of Self-Service. **September 18**

Casual workers and teachers are appointed using the

same new starter wizard as for employee appointments. The main difference for users is that the hierarchy information (division, department etc.) in the post details screen will be blank and needs to be manually entered each time a new appointment is created.

In all cases the Grade and Scale point will be X99, scale point 1 and the salary will be ± 0.01000 . The actual rate of pay will instead be included on the timesheet (see section H).

indicates required steps when creating a new appointment.

This guide covers the following process steps:

Α.	٠	Searching for the post and employee record	2
В.	٠	Appointing the individual	4
1		Appointing a new starter (new to University)	
2		Appointing as a rehire	5
3		Appointing into an additional appointment	7
С.	٠	The appointment wizard	8
D.	A	dditional details	
1		Right to work	11
2		Equality Data	13
3		Check/complete Bank Details	13
4		Additional address details	14
5		Enter additional contacts	16
Ε.	G	enerating a letter of engagement	17
F.	•	Commencing the individual	
G.	•	Salary approval	20
н.	С	ompleting and submitting the Casual Payment spreadsheet	22
Ι.	С	orrecting errors	
J.	Er	nding appointment(s)	
к.	A	PPENDIX	

Right to work checks must be completed BEFORE any work commences.



Navigate to: Personnel > Maintenance > Personal Profile

A. • Searching for the post and employee record

- 1. Click the New Appointments button. The Applicants/Posts window opens.
- 2. Select the **Posts** tab.
- **3.** Enter the appropriate post number in the search box referring to the guidance below:

Roles with a sub category/staff classification of AC or AT (casual teachers)	Enter the post number CASTCH in the search box.
Roles with any other sub category/staff classification	Enter CASUAL in the post number in the search box.

Applicants/Posts 00000000000000000000000000000000000				
Applicants Posts Transfer In Transfer Out				
Search By Post Number			Search	
Search By Post Title		¥		
Search By Department		*	Clear	
Post / Sequence Post Title	Appointment Status	Department	Post FTE Active Fte Active Appoint	ments
CASUAL 0 Casual Worker	Auto Authorised		0.00	Select

4. Click the <u>Select</u> button to the right of the Post. The *New Appointment Search window* opens:

New Appoint			9999999999999				000000000000	*********	000000000	
Name	[Date	of Birth	V		-	Search
Initials					Gen	der	OMale	C Female	@ All	Clear
Known As					Ninu	mber				
Results										
Nar	me	Personnel No	Department	DOB	NI number	Initials	Gender	Known A	AS A	Select

Use the Search criteria to ensure the individual does not already have a personnel record. You should search separately on at least two of the following criteria: Name (Surname), NI number, Date of Birth. Enter one 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.

- **5a**. If the person **does not exist in the database** treat them as a new starter.
- Click Create New Starter and Go to Appointing a new starter (new to University)

OR

5b. If the person has an old ended appointment treat them as a rehire (the **Action** box shows 'rehire').

2	New Appointmen	t Search 🔀			******		*******	000000000000000000000000000000000000000	000000000000000000000000000000000000000			0000
6	New Appoint	ment Searc	h								PER747	
	Name	LONGWALL				Date	of Birth			7	Search	
	Initials					Gen	ler	⊂ Male	C Female @ All		Clear	
	Known As					NI nu	ımber					
	Desults											
	Results											
	Nar	ne	Personnel No	Department	DOB	NI number	Initials	Gender	Known As	Action		
	LONGWALL, D	OMINIC	2346805	RESEARCH CENTR	01-OCT	*******233C	DJ	Male	DOMINIC	rehire	Select	



Click on **Select** to the right of the action box and **Go to section B2 Appointing as a rehire**

OR

5c. If the person has a **current active appointment** (the **Action** box shows 'new appointment').

								ch	opointment Sear	lew Appo
Search	¥		Ţ	e of Birth	Da			ET	CORNMAR	Name
Clear	· All	C Female	C Male	nder	Ge					Initials
				number	NI				As	Known As
									3	lesults
Action Select		Known A	Gender	Initials	NI number	DOB		Personnel No	Name	
_	As new ap	Known A			NI number		Department	Personnel No	Name MARKET, MELANIE	



Click on **Select** to the right of the action box to create a new additional appointment and **Go to section B3 Appointing into an additional appointment**

B. • Appointing the individual

Appointing a new starter (new to University)

The 3-step 'Create New Person Wizard' opens:

ersonal Details		Personal Details (Step 1 o	f3) —	PER740
ersonnel No Type	Default Automatic.		sonal Details:	Please enter new employee contact information on this screen.
orename		Pos	st Details:	Details such as name, address, and
Surname		Pay	y Details:	telephone number can be entered here.
ddress And Contac	t Information	Gender		
vliddle Name		C Male	C Female	Unknown
(nown As		Age		
fitle	Initials	Date Of Birth		
Qualification		Retirement Date		
Country	UNITED KINGDOM	Retirement Date		
Address Line1		Marital Details		
Address Line2		Marital Status	NOT IN USE	×
Address Line3		Date Of Marriage		
Address Line4		Previous Surname		
Address Line5		Miscellaneous		
Post Code		NI number		
Phone No.		Passport No.		
Vationality		Starter Declaration		-
		Health Insurance Name		2
		Health Insurance No.		
			File Comp	lete

1.1. Complete basic informat	
Field Name (* mandatory)	Description
Forename *	Enter first name in full. E.g. Robert not Bob.
Surname *	Enter surname.
Middle Name	Enter all middle name/s in full if known. E.g. Robert not Bob.
Title	Select from drop-down list.
Initials	Enter initials for forename and middle names.
Qualification	Field not in use.
Known as*	Enter first name only. Can be shortened if preferred. This will be used to generate the work email address.
Country*	Select from the LoV \bigodot in ALL cases including UK.

1.1. Complete basic information:



Q	NB : even though this field is shaded yellow it must be updated. This is required for HMRC (RTI) purposes.
Address *	Enter full address details. This field must not be left blank and must have at least two lines. If no home address given, enter department address. NB: If the address is outside the UK you must also enter the country in the last line of the address. This is required to ensure correspondence is addressed correctly.
Post Code * (UK addresses only)	Enter/check it is entered across both fields in alpha numeric format as shown AA1(1) (1)1AA.
Phone No.	Enter if known.
Nationality	Field not in use.
Gender *	Select as appropriate.
Date of Birth *	Complete using the format DD-MMM-YYYY.
Retirement Date	Please ignore this field. System calculated, but not compliant with recent legislative changes.
Marital Status	Field not in use.
Date of Marriage	Field not in use.
Previous Surname	Enter if known.
NI Number *	Enter when known. Must be completed
Health Insurance Name/No.	Field not in use.
File Complete	Field not in use.

1.2. Click Next >> and Go straight to section C. The appointment wizard

1. Appointing as a rehire

2.1. The *Re-hire Person* window opens:



Personal Details —				PER740
		P	ersonal Details:	Please enter new employee contact information on this screen.
Personnel No.	0002010	. 🚨 🛼 Ре	ost Details:	
Forename	DOMINIC			Details such as name, address, and telephone number can be entered here.
Surname	LONGWALL	Pa	ay Details:	
Address And Conta	act Information	Gender		
Middle Name	JAMES	Male	C Female	C Unknown
Known As		Age		
Title	Mr Initials DJ	Date Of Birth	01-OCT-19	95 19.87
Qualification		Retirement Date	01-OCT-20	
Country			101-001-20	
Address Line1	HIGH STREET	Marital Details		
Address Line2		Marital Status	NOT IN US	E
Address Line3	OXFORD	Date Of Marriage		
Address Line4		Previous Surname		
Address Line5		Miscellaneous		
Post Code	OX1 1AA	NI number	BA1122330	C
Phone No.		Passport No.		
Nationality		Starter Declaration		¥
		Health Insurance Name		2
		Health Insurance No.		
			File Com	olete

2.2. Check details are correct and update if required, noting the following:

Field Name (* mandatory)	Description
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 full address details. This field must not be left blank and must have at least two lines. If no home address given, enter department address. NB : If the address is outside the UK you must also enter the country in the last line of the address. This is required to ensure correspondence is addressed correctly.
Post Code * (UK addresses only)	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 can be added via 'contact details' if required.

Contact, email and bank details should already be set up on the person record but must be checked and updated if required.

2.3. Click Next >> wizard

and Go straight to section C. The appointment



2. Appointing into an additional appointment

3.1. The Appoint Existing Person window opens:

rsonnel No. 🛛 🛛 🗤	02004	MELANIE CORNMAR	RKET				Vi	ew New Appointm	
xisting Appointn	nents							Select	
ost No. / Sequence	Post Title		Substantive Date	Department	Start Date	End Date	FTE	Appointm	
228804	1 ASSOCIATE	PROFESSOR	01-JUL-2015	INSTITUTE OF FUTURE	ECH 01-JUL-2015		0.8000	View Appointment	
								View Appointment	
								View Appointment	
								View Appointment	
place An Existing Ap		c @ B	Replace	ement Type					
eplace An Existing Ap reate A New Addition			Replace	ement Type					
actions eplace An Existing Ap reate A New Addition ransfer Details – Fransfer Status			Replace						

- **3.2.** Click **View Appointment [A]** to view the current appointment.
 - 3.2.1. If the existing appointment is a casual appointment, check that you are not creating a duplicate appointment. If the existing appointment is exactly the same as the one you are creating (i.e. same department, same category and sub category) click on cancel and red door to exit the record.
 - 3.2.2. If the existing appointment is a casual appointment in a different department, a casual appointment in your department but with a different staff classification, or any other type of appointment e.g. Fixed term or Permanent, select the Create A New Additional Appointment radio button [B].
- **3.3.** Click OK



Contact, email and bank details do not need to be re-entered – these should already be set up on the person record.



C. • The appointment wizard

1. The *Post Details* screen has opened with very little information completed:

Post Profile Type 4 Worker Past Part Date Planned End Date Auto Authorised Auto Commenced Personal Cost Centre Post Profile Profile Post Profile	Post Details			Post Details (Step 2	of 3)		
Four House ype Imported in the importance in the importa	Post No./Sequence	CASUA 👔	CASUAL WORKER		Personal Details:		
Control Auto Autorized Planned End Date Auto Authorized Hierarchy Details Company 10 <	Post Profile Type	4	Worker	1	Post Details:	en	ployee on this screen.
Planned End Date Auto Authorised Auto Commenced Pay Details: Hierarchy Details Auto Authorised Auto Commenced Pay Details: Company 10 UNIVERSITY OF OXFORD Post Type 4 ? WorkKER Division ? Job Category ? ? Job Category ? ? Sub Division ? ? Sub Division ?	Start Date		👔 Target End Date 🛛 🔽				
Company 10 INIVERSITY OF OXFORD Post Type 4 INORKER Division Image: Company	Planned End Date		Auto Authorised Ruto Commenced 🗌		Pay Details:	an	u cost centre may be entered here.
Division Image: Construction of the second seco	Hierarchy Details	\$		Appointment De	tails		
Division Image: Construction	Company	10	UNIVERSITY OF OXFORD	Post Type	4	2	WORKER
Sub Division Image: Comparison of the	Division			Project		2	
Level 4 Image: Constant of the c	Sub Division			Job Category		2	
Management Unit Imployee Satus Imployee Satus Department Imployee Satus Imployee Satus Department Imployee Satus Imployee Satus Pay Administered by Imployee Satus Imployee Satus Pay Administered by Imployee Satus Imployee Satus Cost Centre Imployee Satus Imployee Satus Location Imployee Satus Imployee Satus Location Imployee Satus Imployee Satus Vork Group Imployee Satus Imployee Satus College Association Imployee Satus Imployee Satus College Association Imployee Satus Imployee Satus	Louis	, 		Job Title	ZCW Job Text		CASUAL WORKER
Department Image: Cotegory X Image: Not APPLICABLE/NOT REQUIRED Pay Administered by Image: Cotegory X Image: Not APPLICABLE/NOT REQUIRED Cost Centre Image: Cotegory X Image: Not APPLICABLE/NOT REQUIRED Cost Centre Image: Cotegory X Image: Not APPLICABLE/NOT REQUIRED Location Image: Cotegory X Image: Not APPLICABLE Work Group Image: Cotegory Image: Not APPLICABLE FTE Hours Vork Group Image: Cotegory Image: Not APPLICABLE FTE Hours College Association Image: Not APPLICABLE Pensionable Acting Up Ind College Association Image: Not APPLICABLE Reason Code Image: Not ApplicaBLE				Employee Status			
Department Image: Comparison of the	Management Unit	[Sub Status			
Pay Administered by Image: Construction Cost Centre Image: Construction Location Image: Construction Image: Construction Image: Constretion Image: Construction	Department			Category	x		NOT APPLICABLE/NOT REQUIRED
Cost Centre Image: Cost Centre </td <td>Pay Administered by</td> <td></td> <td></td> <td>Sub Category</td> <td></td> <td></td> <td></td>	Pay Administered by			Sub Category			
Location Locati	Cost Centre				×		
Work Group 1	1				F	TEVW	eeks 52.0000 FIE%
College Association 1 Image: College Association 1							
College Association 1 DEFAULT/NOT APPLICABLE Reason Code 2 Replaces Employee 2	Work Group	1	Core Default Work Group		Acting Up		
Replaces Employee	College Association	1	DEFAULT/NOT APPLICABLE				
Comments [Casual							
					Casual		
		Cancel		<< Pre	VIOUS		Next >>

2. Complete/update fields as below:

Field Name (* mandatory)	Description
Start Date *	Enter the start date
Target End Date *	Enter planned end date. (Max 12 weeks for casual workers and 12 months for casual teachers).
Company through to Pay Administered by	Enter hierarchy details
Cost Centre *	Should be the departmental default. Format will be AA000000000000 where AA is the 2 digit department code.
Location	Select location. This will either be the department default OR if an alternative address is specified for the payslip that exists within the University (including Oxford colleges) select that location from the drop down list.
	If the payslip is to go to an address other than the Location or home address this should be entered in the address maintenance screen (see section 6.4).
Work Group	Not required. Leave as 'Core Default Work Group'.
Project Code	Do not use.



Job Category	Do not use.
Job Title *	Leave as Casual Worker or Casual Teaching.
Job Text *	Enter actual job title . This is required for HESA reporting purposes.
Employee Status *	Ensure Worker is selected (code 4). NB: When processing a rehire the system will copy this from the previous appointment so you will need to change it.
Sub Status *	Select Atypical (code 5).
Category *	Enter/Select 'Category'. Please refer to the Staff Classification Guide on the <u>staff classification section</u> of the HR Information team website. For CASTCH appointments this must be 1- 'TEACHING ONLY' if the Sub Category is AT or 3 –
	'TEACHING AND RESEARCH' if the Sub Category is AC. Note: This field is used for statutory reporting including HESA.
Sub Category *	Enter/Select 'Staff Classification'. It is important that the correct staff classification is selected.
	For CASTCH appointments this must be AT or AC. For CASUAL appointments please refer to the Staff Classification Guide on the <u>staff classification section</u> of the HR Information team website.
	This field must be completed to prevent failure of interfaces to other systems.
Hours *	Enter hours as 0 .
FTE Hours *	Enter 36.5 for CASUAL appointments, or 37.5 for CASTCH appointments.
FTE *	Enter 0 .
FTE% *	Should be 0.
Weeks	Not required
FTE Weeks	This field will be set by the system to 52.
Action *	Select New Appointment
Reason Code *	Select New Starter – New to University, New appointment - Ex-employee or New Additional Appointment as applicable.
Replaces employee	Do not use



Comments	Will default to 'casual'. Enter further additional
	comments as required but do not overwrite the
	default.

3. Click Next >> .

	ormation		Pay Details (Step 2	of 2)	
Pay Group		MONTHLY		Personal Details:	Please enter pay related information for
Date Of Birth			\$	Post Details:	the employee on this screen. Details such as pay scale, point and salary can be entered here.
Age				Pay Details:	and salary can be entered here.
alary details			Overseas Salary	/ details	
Pay Rate Type	Scale-Point *		Overseas Salary		
			Rate Type		·
Pay Scale	X99 🕜		Currency		~
Point	1 😢		Pay Scale		2
Rate	Annual		Point		N?
Multiplier	.000000		Rate	V	
Hours	0	Paygroup Hours 36.	5 Multiplier		
			Salary		
Amount	.01	C Qualification Ind.	Effective Date		
Effective Date	01-APR-2018	Increment Hold Ind.	Salary Comments		
Increment Due Date	Comments				
Salary Comments					
	Cancel		<< Prev		Save

Field Name (* mandatory)	Description
Pay Group *	Select Monthly (20). If a different pay group is already present, e.g. 99, contact the HRIS support centre to change it if required.
Pay scale	Defaults to X99. Do not amend. NB: When processing a rehire the system will copy this from the previous appointment so you will need to change it.
Point	Defaults to 1. Do not amend NB: When processing a rehire the system will copy this from the previous appointment so you will need to change it.
Multiplier	Defaults to .0000 Do not amend
Paygroup Hours	This value has no impact on pay and should be ignored.
Amount	Defaults to .01. Do not amend
Increment Due Date	Leave blank. NB: When processing a rehire the system will copy this from the previous appointment so you will need to remove it.



Comments	Leave blank
Salary Comments *	Enter notes for the Approver/ Payroll, to re-iterate the type of appointment e.g. New starter.

4. Click Save



<u>_</u>	<u>•</u>		-	3 3	🧿 🕐 📕			
ppointment	Details							
ersonnel No.	23575	99					Multiple Appointments Exist	
orename	Tracy						Show My Current	•
Surname	Test							
Surname	Test							
Surname Appointment	,							
Appointment	s	opointment Id	Start Date	End Date	Department	Job Title	Employee Status	Substantive Date
Appointment Appointment Sta	s tus Aj	opointment Id ASUAL-19004	Start Date	End Date	Department		Employee Status	Substantive Date
Appointment Appointment Sta	s tus Aj			End Date	·			
	s tus Aj			End Date	·			

6. Red door back to Person Profile Maintenance screen.

D. Additional details

1. • Right to work



Note: It is essential that these checks are completed **BEFORE** any work commences. Refer also **<u>QRG</u>**: **<u>PA10</u>** <u>**Maintaining Right to Work Data**</u>. Information about right to work requirements and restrictions can be found on the Staff Immigration team website under UAS>Personnel Services.

1.2 Go to Select Detail > Right to Work.

1.3 Click New - the Right to Work screen opens:



User Data	002002	Louise Wallton		
Personnel No	002002	Louise waiton		
Right to Work				
Date From				
Date To				
	Right to Work Type			
	Permanent (List A)			
	Limited (List B)			
	Visa Issue Date			
	Visa Expiry Date			
	RtW Date Checked			
	RtW Docs Checked E	ly .		
	RtW Date Next Check	t i i i i i i i i i i i i i i i i i i i		
	Comments			
				2
			1	2
ОК		Delete	Cancel	Letters

1.4 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 ${igveen}$, otherwise leave blank.
Limited (List B)	$\mathbf{\underline{If}}$ 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.



2. **•** Equality Data

Note: Required for HESA reporting purposes. It is essential that the individual is asked to complete and return the Staff Starter form.

In the letter module in CoreHR create a pre-populated form to send to the new starter for completion. To generate the form, follow the steps in section E of this guide and choose **Letter Type: Equality and Diversity Form**. Alternatively a non-core version of the form (Staff Starter Form) can be found on the <u>Equality and Diversity website</u>.

The casual worker should return the completed form in a sealed envelope to the Data Service Team, Dartington House, University Offices, Wellington Square or email it to Hrisdata@admin.ox.ac.uk.

3. • Check/complete Bank Details

ersonal Details			Payment Details	
Personnel No	002004			
Forename 🛛	ELANIE		Payment Details:	Enter new employee payment details on this screen.
Sumame C	ORNMARKET			
Payment Details	Alternate Payment D	etails		
Pay Method	PP	BACS		
Bank Sort Code	90216	🕐 Yorksh	ire Bank plc	
Bank Account No.	00123456			
Bank Address	Oxford Oxford			
BIC				
IBAN				
Building Society Reference				
CSO Indicator		0		

3.1. Go to **Select Detail** > **Bank Details**:

Field Name (mandatory*)	Description
Pay Method*	Enter/select BACS
Bank Sort Code*	Enter Bank Sort Code then press the Tab key. The bank name/address will appear. Note : If the sort code begins with a 0 you do not need to enter it e.g. 012345 should be entered as 12345.



Bank Account No.*	Enter 8 digit bank account number
Building Society Reference	Enter if applicable



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

3.2. Click Save and OK.

4. Additional address details

Field Name	Screen	Guidance		
Location	Post Appointment Maintenance	 This should be the normal work location/address 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 via address maintenance.) 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 > Select Detail > Address Maintenance	• Only complete this if payslips are to go to an address <u>other</u> than the Location or Home Address and Payroll have been informed of this requirement.		

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

🙀 Address Sea									
	$\bigcirc \bigcirc $		800	?					
Person Details									
Personnel No.	Personnel No. 0002003 GILES BEAUMONTE Add Address								
Address Details									
Address Type		Effectiv	e Date Address De	etails				Active	
DEFAULT		01-JUN	I-2015 Flat 1a,Hig	h Street,Oxford	i,		Edit		
							Edit		



4.2 Click on Add Address

Address Maintenance Address Details	
Date Effective Address Type	24-JUL-2015 2
Country Address Line1	Address Types
Address Line2	Name
Address Line3 Address Line4	DEFAULT FORWARDING ADDRESS
Address Line5	HOME ADDRESS HOME ADDRESS (ALTERNATIVE 2)
Post Code	LABEL ADDRESS (PAYSUP) TERM-TME ONLY ADDRESS WORK ADDRESS
	THORE ADDITESS
	С
	(Eind) (QK Cancel)

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. This is required for HMRC (RTI) purposes.
Address Lines 1 to 5*	Enter full address details. This field must not be left blank and must have at least two lines. If no home address given, enter department address. NB: If the address is outside the UK you must also enter the country in the last line of the address. This is required to ensure correspondence is addressed correctly.
Post Code* (UK addresses only)	Enter across both fields in alpha numeric format as shown e.g. AA1 1AA.

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

Address Search								
Person Details								
Personnel No. 2357681 PAUL BOTLEY Add Address								
Address Details								
Address Type	Effective Date Address Details		Active					
HOME ADDRESS	28-SEP-2016 New Road, Oxford, ,,, United	Kingdom	Edit 🗹 🏔					
DEFAULT	13-JUL-2015 High Street,Oxford,,,,		Edit					



Note: You should only add a Label Address (Payslip) if payslips are to go to an address other than the Location or Home Address **and** Payroll have been 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.

5. Enter additional contacts

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

Once they have been generated and interfaces run, University card details and e-mail address will be shown here.

Contacts Contact Type	Contact	
1Y		

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

- **5.2.** Click in the **Contact Type** field.
- **5.3.** Click the **?** button in the Tool Bar.

5.4. Select the relevant value from the list. Click $\bigcirc^{\square K}$

- **5.5.** Enter the relevant details into the **Contact** field.
- **5.6.** 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.



E. Generating a letter of engagement

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 Post Number 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**.

Tools	<u>W</u> indow		
⊻iew CoreHR Documents			
Let	ters		

5. The *Generate Letters Module* window opens:

enerate Letters Mod	lule sectores accordences accordences accordences accordences accordences accordences accordences accordences a
	HR01
Select Letter Type	ı ————
Letter Group	POST APPOINTMENTS
Letter Type	
Options	Perform Mail Merge
Selection	Current Record All Query Records

- **6.** Select Letter Group: Post Appointments
- **7.** Select Letter Type: CASUAL TEACHING CONTRACT FOR SERVICES or CASUAL WORKER ENGAGEMENT LETTER as applicable
- 8. Options will default to 'Perform Mail Merge' and must not be changed
- **9.** Ensure current record is selected and click OK



- **10.** Choose 'Open' for prompts to appear
- **11.** If you can't see the prompt questions, minimise all screens to find prompt box

	ws Internet Explorer	
Wh	at do you want to do with	
201	506051423370000000272.doc?	
	44.5 KB	
	: Microsoft Word 97 - 2003	
From	: C:\Users\admn2711\Appdata\Local\Temp	
-	Open	
	The file won't be saved automatically.	
•	Save	
•	Save as	
		Cancel

- **12.** The Word document will open.
- **13.** If the message below appears at the top of the page click on **Enable Content**.

1	Security Warning	Macros have been disabled.	Enable Content	×	

- **14.** Save the document in a secure location as a .doc or .docx file and Exit to return to CoreHR.
- **15.** Close the window in your browser.
- **16.** The system displays a message: 'Did the letter print successfully?' Click <u>Yes</u>.



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 this message select 'No'.

Security Warning	? ×					
Do you want to make this file a Trusted Document?						
This file is on a network location. Other users who have access to this network location may be able to tamper with this file.						
What's the risk?						
Do not ask me again for network files	No					

Q I	f the document	is saved	as a .do	ocx you	will	not see	the	above	Security	Warning
messa	age when reope	ning a say	ved doc	ument.						

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.



F. • Commencing the individual

 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:

			🙆 🖸 🗎 可	2				
Person Profile Select Detail								
Personnel No.	0002002						01 - Personal Detail	
Forename	LOUISE							
Surname	WALLTON						04 - Contacts	

- 2. Go to Select Detail box > Appointment Details.
- **3.** Click into the **Post Number** to ensure the correct appointment is highlighted. Click the Appointment Details 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**.

Date Commenced	nced	2	
	ок	Cancel	



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

- 6. Click OK . Click 📙 then OK.
- **7.** Finally, go to **Selection** box > **View Position History** to check that the salary details are 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** <u>QRG:</u> <u>CH5</u> <u>Change: Pay for guidance</u>.



NEXT STEPS: Unless you were able to approve the salary line, this will now appear in your approver's list for approval.

G. • Salary approval

All new salary lines and changes must be approved within your department before the payroll deadline.



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**.

Maintain Ap	provals					Select Detail		Order By	
Personnel No.	002006	HELEN WO	ODSTOCK			My Approval Items		Reason	
			Pay Group		*	All Outstanding Items View All Rejected Items	4	Effective P	
Department	0					View All Approved Items		Effective D	
						Search Clear		Personnel Effective D	No,)ate, Reason
Detail - Ann	proval Items								
Personnel		Allowances	Effective					Rate	
				D	D 0 1		Detest	Түре	Rate Of Pay
No.		Only	Date	Reason	Pay Scale		Punt	rype	Rate OFFay

2. Select the relevant employee entry click the Approve button (or reject).



The Approve Salary Amendments window opens:

	Scale		_	Point R	ste Type	Rate Of Pay	Multiplier	Actual Pay		
	New salary is not	replacing a current sa	lary B			1				
Total Salary(Including	(Allowances)	Scale Point/			Annualised					
Allowance	Allowance Type	Percentage	Value	Annual Value	Start Date	End Date	Reason			-73
			-	_					View	-1
		_	-			_	-		View View	
			10		- 2	- N.	1			
Point Leason	NEW ADDITIONAL APPO		ultiplier	000000	0.00					
Salary Comments					1	Total Amendm	ent Value 🗌	0.00		
Allowance	Allowance Type	Scale Point/ Percentage	Value	Annual Value	Start Date	End Date	Reason			
And Wante	Convence (The	Fercencage	Value	Petripal Value	Start Late	Chu Date	Reapon		View	13
							1		View	
						7.0			View	1
					Comr	ments			D	
	ADMN2742	T1-APR-2018								
upproved By	hemmine i e e									

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].

Field Name (* mandatory)	Description
Effective date *	Start date of appointment.
Pay scale *	Х99
Point *	1
Rate of Pay *	0.01000
Multiplier *	0.00
Actual Pay *	0.00

3. Check the New Salary data is correct:



Reason *	Should be: New Starter New to University, New Additional Appointment or New Appointment Ex- employee as applicable
Salary comments *	Notes for salary approver.

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



- **5.** 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.
- **6.** Exit all windows back to the Personnel main screen.

H. Completing and submitting the Casual Payment spreadsheet

Please read the information below before completing the spreadsheet, particularly if you are completing it for the first time. The spreadsheet must be used to submit all payment requests for casuals. New starters and repeat payments should be entered on one sheet.

The Casual Payment spreadsheet contains four tabs:



Payment Sheet tab

All data must be entered in the 'Payment Sheet' (not case sensitive).

Error List tab

Displays any validation errors. If you are unsure why any of the fields on the Payment Sheet are highlighted in red, open this tab to view the error message(s).

Guidance Notes tab

Contains a summary of the details required in each field and indicates the mandatory fields.

Payroll Use Only tab

This tab contains the data entered on the 'Payment Sheet' tab formatted to enable it to be uploaded into CorePay. **You must not change anything in this tab**.



1. Validation rules

Most fields in the template contain validation rules to ensure that all required information is entered accurately before you submit the spreadsheet for payment. If incorrect or incomplete details are entered in a critical field, a pop up error message will be displayed. Click Betry to correct the entry.

If a critical field is left blank or conflicting entries are made, e.g. an hourly Pay code is selected but a cash value is entered, the field(s) will be highlighted in red and an error message will be displayed in the **'Error List'** tab.



Note: You must ensure that all validation errors (red fields) have been cleared before you submit the payment spreadsheet to Payroll. Submitted sheets that contain validation errors will not be processed and will be returned to you for correction. The sheet cannot be re-submitted until the following month.

On some fields a warning message will appear if a value is entered that falls outside recommended values, e.g. an ad hoc rate of pay is entered, $Click \$ to clear the message and continue.

Example of a pop up error message

If you enter invalid details, e.g. an invalid appointment ID, the following message will appear:

Incorrect	Appointment ID	×
8	The Appointment ID that you have entered is not in the correct format. - The Appointment ID must begin "CASUAL" or "CASTCH" followed by - (hyphen) and then at least on	e numeric character.
	Please check and try again.	
	<u>R</u> etry Cancel <u>H</u> elp	

1.1. As soon as you enter a surname, the first few fields will be highlighted in red. As you complete each field the red highlights will disappear unless you have entered incorrect or invalid information.

3 BY VISA?		SURNAME	INITIALS	EMPLOYEE NUMBER	APPOINTMENT ID	HOURS LIMITED	TRANSACTION DATE	PAY CODE
4 EXAMPLE	3					BY VISA?		
	4	EXAMPLE						

1.2. Once you select a Pay Code, the required fields for the chosen pay code are highlighted in red.

	PAY CODE	HOURS VALUE	RATE OF PAY	COST CENTRE	PROJECT	COMMENT
3						
4	Admin - Proj (H)					
5	Casual Labour GL (H)					
_						



1.3. Whenever the sheet contains red highlights a message will be displayed at the top of the page to indicate the number of rows that contain errors.

	А	В	С	D	E	F	G	н	1	
1		1 row(s) h	ave errors. Please c	heck the 'Error Li	ist' sheet for deta	ails!				
	I row(s) have errors. Please check the 'Error List' sheet for detailst University of Oxford - Casual Payment Submission Template Please note that this template is the official template for supplying payment data to the Payroll Team for casual workers. All casual paym a 'Payroll Use Only' worksheet formatting of date errors. Please refer to the Error List and Guidance Notes tabs and the ORG PA11 Setting up a Casual Appoint Casual Payment Submission Template							te		
2	UNIVERSITY OF		Jse Only' worksheet for	matted for direct in ng or data errors.	nport into the Core Please refer to the	Pay module; all data r Error List and Guidan	nust be supplied via input i	nto the 'Payme G PA11 Setting	nt Sheet' worksh up a Casual Apj	nee opoi
-			Jse Only' worksheet for	rmatted for direct ir ng or data errors.	nport into the Core Please refer to the casual payment d	Pay module; all data r Error List and Guidan ata cannot be process	must be supplied via input ince Notes tabs and the QR red. Any queries about the	nto the 'Payme G PA11 Setting use of this tem	nt Sheet' worksh up a Casual Ap	nee opoi dire
-	OXFORD	red cells,	Jse Only' worksheet for which indicate formattin	matted for direct in ng or data errors. APPOINTMENT ID	nport into the Core Please refer to the casual payment d	Pay module; all data r Error List and Guidan ata cannot be process	must be supplied via input ince Notes tabs and the QR red. Any queries about the	nto the 'Payme G PA11 Setting use of this tem	nt Sheet' worksh up a Casual App plate should be o	nee opoi dire

1.4. If necessary open the **`Error List**' tab to see an explanation of what is incorrect/missing for each row.

Error Details - Please ensure that any errors reported in the list below are corrected before this sheet is submitted otherwise it will be returned to you for correction Row 5: Employee Number Missing. Appointment ID Missing. Row 6: Hours Based Pay Code selected and Hours Value missing. Hours Based Pay Code selected and Rate missing.

2. Completing the payment spreadsheet

2.1. Open the payment spreadsheet and save it in a secure location. (To ensure you are always working with the most up to date version, open the spreadsheet from the payroll website.)

Type (*mandatory)	Field name (*mandatory)	Description
Person details*	Surname*	Enter legal surname as shown on the passport or visa.
	Initial*	First and middle names only
	Employee number*	Personnel number from CoreHR
	Appointment ID*	Enter CASUAL or CASTCH as applicable followed by a hyphen (-) then the appointment sequence without any spaces, e.g. CASUAL-1234.
	Hours limited by visa*	Select Yes/No as applicable. If Yes you must enter a value in the Hours value field and select a date from the drop down list in the week/period ending field.
Payment details*	Week period ending*	Select a date from the drop down list in the week ending field i.e. the week in which the work was undertaken. NB: the start date on the appointment must be earlier than the transaction date you are entering.
	Pay code*	Select from the drop down list.

2.2. Complete the fields as below:



	Cash Value Required if the chosen	 GL and Proj denote source of payment (H) = hourly rate (C) = cash value The option chosen here will determine which other fields must be completed. Enter the amount to be paid. NB: Restricted to certain pay codes e.g. 					
	paycode ends with (C) Hours value Required if the chosen pay code ends with (H). * mandatory for tier 4 workers	Expenses. Enter the number of hours i.e. the hours for <u>each week worked</u> during the claim period or, if making payment for piece work, the number of pieces					
	Rate of pay	Select the rate from the drop down list or enter a value manually. NB: must not be less than the national living wage (lowest value on the drop down list) unless it is for piece work.					
	Cost Centre Required if the chosen Paycode contains GL	Enter the relevant GL code, e.g. GL00000000000 (i.e. cost centre, activity & source of funds)					
Costing details*	Project Required if the chosen Paycode contains Proj	Enter the relevant Core project code, e.g. PR000000.0000					
Additional details	Comment	Enter any additional comments for dept. reference only. If paying for piece work enter the estimated number of hours. (NB: Payroll will ignore this field.)					
Line total		This will show either the total pay per line (Hours Value x the Rate of Pay) OR the Cash Value for that line as applicable.					

Paying for piecework

Q

If you are paying for 'piece work' you must enter the number of pieces in the **Hours Value** field. Please also enter the <u>estimated</u> hours in the **comment** field.

Note: Further guidance on the requirements for gender pay gap reporting including FAQs can be found on the <u>Reward team website.</u>

See appendix for an example of a completed spreadsheet.

- **2.3.** Password protect the spreadsheet with the password provided to you/your department. (You must encrypt the spreadsheet to prevent it from being opened without the password so that it can be emailed securely.) Refer to the information security website <u>https://www.infosec.ox.ac.uk/</u> for the latest guidance on how to protect documents for sending by email.
- 2.4. Email the spreadsheet to payroll.casuals@admin.ox.ac.uk .



I. Correcting errors

1. The spreadsheet has been rejected by the Payroll team

If you submit a casual payment spreadsheet containing validation errors (red highlighted fields), or if you submit a previous version of the spreadsheet, it will not be processed and the Payroll team will reject it.

Refer to section **10.1 Validation rules** for guidance on identifying the reason for the error(s).

The latest version of the spreadsheet can be obtained from the HRIS website.



Note: You will not be able to resubmit the spreadsheet until the following payroll month as you will have missed the deadline for the current month.

2. One or more entries have failed the data load into CorePay

If you submit a payment sheet that contains errors not covered by the validation rules within the workbook it could still be rejected by CorePay when the file is uploaded, e.g. quoting an invalid cost centre or project code.

Payroll will email you about any rejected items and include a PDF report showing the rejected lines (including an error description) and guidance on the possible reasons for rejection. You will need to investigate the errors and **submit a new payment sheet containing the corrected lines ONLY.**



Note: Do not correct and resubmit the original file. If you do, any previously accepted lines will be uploaded again resulting in duplicate payments.

3. Resubmitting the payment sheet

When Payroll contact you about any rejected items from the upload process they will include a deadline date for submission of the corrected payment sheet.

If you do not return the corrected sheet by this date, payment will not be made until the following month. Payroll will email you to let you know you have missed the deadline.

4. Payment on hold by the Staff Immigration team

In certain circumstances where there are outstanding queries about an individual's right to work details, the Staff Immigration Team will instruct Payroll to withhold payment. The payment(s) will be deleted from the pay run. Once the query has been resolved and SIT have confirm that payment can be made a new payment sheet will need to be submitted by the next payroll deadline.



J. Ending appointment(s)

An appointment must not be ended until after the payment spreadsheet(s) containing the final payment(s) have been uploaded to CorePay, otherwise the final payment can't be processed. The appointment should not therefore be ended until the end of the month in which the final payment is to be made.

The end date of an appointment must not be earlier than the date entered in the **week/period ending** field for the final payment on the casual payment spreadsheet.

For example:

- Individual's last working day is Friday 23 October 2016
- Payment request submitted with a week/period end date of Sunday 25 October 2016
- Earliest end date that can be entered against the appointment in Core is 25 October 2016
- Appointment can be ended after the payroll has been run i.e. on or after the last working day of November.

To end the appointment(s) follow the steps in **QRG: EA1 Ending appointments** noting the below:

Field Name (* mandatory)	Description					
ried Name (mandatory)						
Effective Date *	Enter the date for the week ending (Sunday) that was submitted on the final payment spreadsheet sent to payroll.					
Leaving reason*	Select 'Casual appointment end'					
Leaving destination*	Select 'Not applicable/not required'					
Location after leaving*	Select 'UK (not otherwise specified)' OR 'N/A Continuing as University Employee' as applicable					
Reason for leaving	Include the actual end date (last day worked) if applicable.					

In the Leaving Details section:

	Useful Reports
0 +5.000	 To search for active project codes run:
1 +1.500	<u>PERDEP13 Active Cost Centres and Project Codes</u> To help track new appointments and leavers don't forget to regularly run:
0 +1.125	 To help track new appointments and leavers don't lorget to regularly run. <u>PERDEP20 Monthly Personnel changes</u> To check for data quality exceptions run report: <u>HRINFO20 Data Quality</u>
0 +1.062	<u>Validation for Casuals</u> .



K. <u>APPENDIX</u>

1	Α	В	С	D	E	F	G	1	J	K	L	М
2	UNIVERSITY OF OXFORD	University of Oxford - Casual Payment Submission Template Please note that this template is the official template for supplying payment data to the Payroll Team for casual workers. All casual payment data must be supplied using this original template. The template contains a 'Payroll Use Only' worksheet formatted for direct import into the CorePay module; all data must be supplied via input into the 'Payment Sheet' worksheet in the correct import format. Payroll will return any spreadsheets that contain red cells, which indicate formatting or data errors. Please refer to the Error List and Guidance Notes tabs and the QRG PA11 Setting up a casual worker record. If any parts of this workbook are copied and supplied separately, the casual payment data cannot be processed. Any queries about the use of this template should be directed to the Payroll Team.										
	SURNAME	INITIALS	EMPLOYEE NUMBER	APPOINTMENT ID	HOURS LIMITED	WEEK/PERIOD	PAY CODE	HOURS VALUE	RATE OF PAY	COST CENTRE	PROJECT	COMMENT
3					BY VISA?	ENDING						
4	EXAMPLE	A	1234567	CASUAL-1	Yes	29-Jan-2017	Admin - Proj (H)	10.00	8.58		PR000000.0000	
5	EXAMPLE	В	1234569	CASTCH-001	No	23-Jan-2017	Casual Labour GL (H)	10.00	8.94	GL00000000000		
6												