

PA11 - Managing casual worker records

Casual workers and teachers are not appointed to individual posts but are instead appointed to 'bucket' posts. These bucket posts are auto-authorized 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:

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

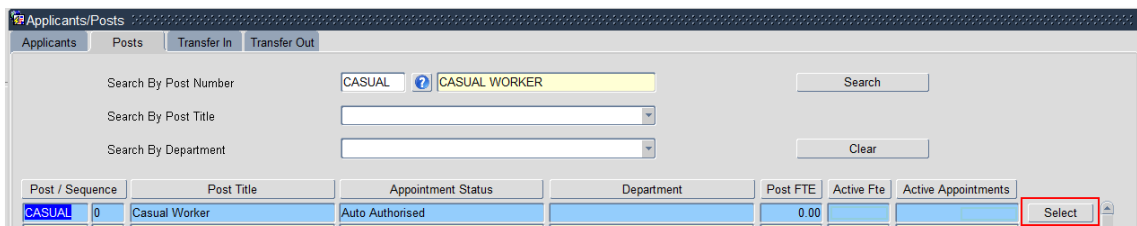
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Navigate to: Personnel > Maintenance > Personal Profile

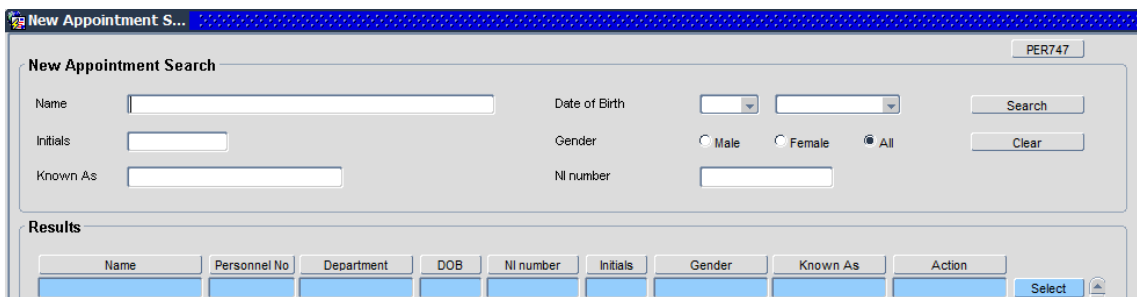
A. ♦ Searching for the post and employee record

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.



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



5. Use the Search criteria to ensure the individual does not already have a 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.

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Note: It is important to search as thoroughly as possible with the available information to ensure you do not create a duplicate record. If you later find a duplicate record has been created please notify HRIS Support.

5a. If the person **does not exist in the database** treat them as a new starter.

Click 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').

The screenshot shows the 'New Appointment Search' interface. The search criteria include Name: LONGWALL, Date of Birth: [dropdown], Initials: [text], Gender: All (selected), and NI number: [text]. The results table is as follows:

Name	Personnel No	Department	DOB	NI number	Initials	Gender	Known As	Action	Select
LONGWALL, DOMINIC	2346805	RESEARCH CENTR	01-OCT	*****233C	DJ	Male	DOMINIC	rehire	<input type="button" value="Select"/>



Note: It is important that you do not make an individual a leaver and then rehire them within the same payroll period. In this instance, you must wait until after the payroll has run before appointing as a rehire.

Click on 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').

The screenshot shows the 'New Appointment Search' interface. The search criteria include Name: CORNMARKET, Date of Birth: [dropdown], Initials: [text], Gender: All (selected), and NI number: [text]. The results table is as follows:

Name	Personnel No	Department	DOB	NI number	Initials	Gender	Known As	Action	Select
CORNMARKET, MELANIE	0002004	INSTITUTE OF FUTU	03-JAN	*****233C	MA	Female	MELANIE	new appointment	<input type="button" value="Select"/>

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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:

1.1. Complete basic information:

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 in ALL cases including UK.

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	<p>NB: even though this field is shaded yellow it must be updated. This is required for HMRC (RTI) purposes.</p>
<p>Address *</p> 	<p>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.</p>
<p>Post Code * (UK addresses only)</p>	<p>Enter/check it is entered across both fields in alpha numeric format as shown AA1(1) (1)1AA.</p>
<p>Phone No.</p>	<p>Enter if known.</p>
<p>Nationality</p>	<p>Field not in use.</p>
<p>Gender *</p>	<p>Select as appropriate.</p>
<p>Date of Birth *</p>	<p>Complete using the format DD-MMM-YYYY.</p>
<p>Retirement Date</p>	<p>Please ignore this field. System calculated, but not compliant with recent legislative changes.</p>
<p>Marital Status</p>	<p>Field not in use.</p>
<p>Date of Marriage</p>	<p>Field not in use.</p>
<p>Previous Surname</p>	<p>Enter if known.</p>
<p>NI Number *</p>	<p>Enter when known. Must be completed</p>
<p>Health Insurance Name/No.</p>	<p>Field not in use.</p>
<p>File Complete</p>	<p>Field not in use.</p>





1.2. Click  and [Go straight to section C. The appointment wizard](#) 

1. Appointing as a rehire

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

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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  and **Go straight to section C. The appointment wizard** 

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2. Appointing into an additional appointment

3.1. The Appoint Existing Person window opens:

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 .




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

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C. ♦ The appointment wizard

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

2. Complete/update fields as below:

Field Name (* mandatory)	Description
Start Date *	Enter the start date
Target End Date *	Enter planned end date. <i>(Max 12 weeks for casual workers and 12 months for casual teachers).</i>
Company through to Pay Administered by	Enter hierarchy details
Cost Centre *	Should be the departmental default. Format will be AA0000000000 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.

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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 staff classification section 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 staff classification section 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

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

The screenshot shows a web form titled 'Create New Person'. It is divided into several sections:

- Personal Pay Information:** Includes fields for Pay Group (set to 20 UNIVERSITY MONTHLY), Date Of Birth, and Age.
- Salary details:** Includes Pay Rate Type (Scale-Point), Pay Scale (X99), Point (1), Rate (Annual), Multiplier (.000000), Hours (0), Paygroup Hours (36.5), Amount (.01), Effective Date (01-APR-2018), and Increment Due Date.
- Overseas Salary details:** Includes checkboxes for Overseas Salary, Rate Type, Currency, Pay Scale, Point, Rate, Multiplier, Salary, Effective Date, and Salary Comments.
- Pay Details (Step 2 of 2):** Contains instructions for entering pay related information.

 Navigation buttons include 'Cancel', '<< Previous', and '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.

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

4. Click .

Note: if you are creating an additional appointment this message will appear:

Click **Yes**.

5. Click . You are returned to the *Appointment Details* window. **Appointment Status** shows **Appointed**.

6. Red door back to *Person Profile Maintenance* screen.

D. Additional details

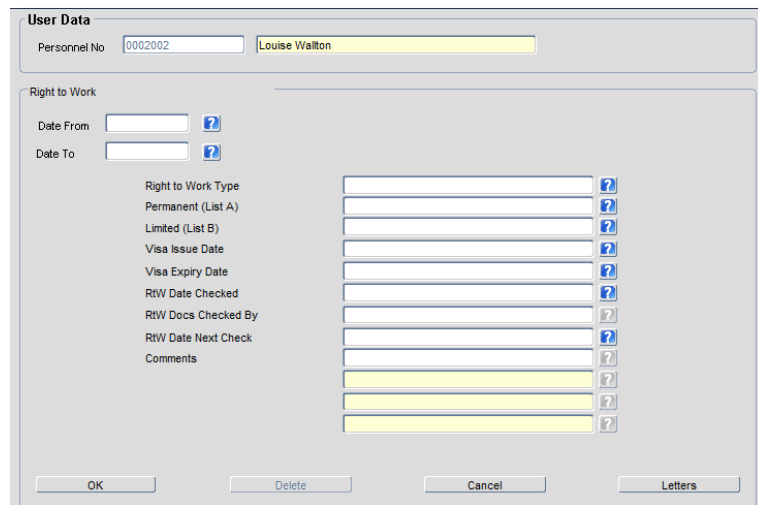
1. ◆ Right to work

Note: It is essential that these checks are completed **BEFORE** any work commences. Refer also **ORG: PA10 Maintaining Right to Work Data**. 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 - the Right to Work screen opens:

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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  , 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.

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1.5 Click  , then  then .

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 [Equality and Diversity website](#).

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

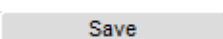

3.1. Go to **Select Detail > Bank Details:**

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.

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

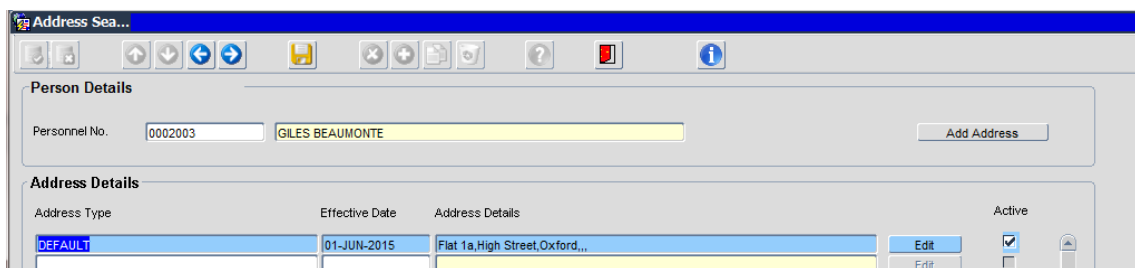
 **Note:** Do not enter any alternative payment details. This has a payroll impact and anything in these fields will be removed by the payroll team.

3.2. Click  and .

4. Additional address details

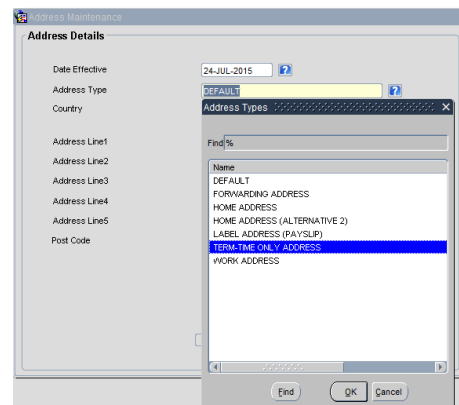
Field Name	Screen	Guidance
Location	Post Appointment Maintenance	<ul style="list-style-type: none"> This should be the normal work location/address for the post and the default delivery address for payslips. Payroll must be notified by email or phone if payslips are to be sent to a different address.
Address	Person Profile	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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:

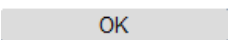


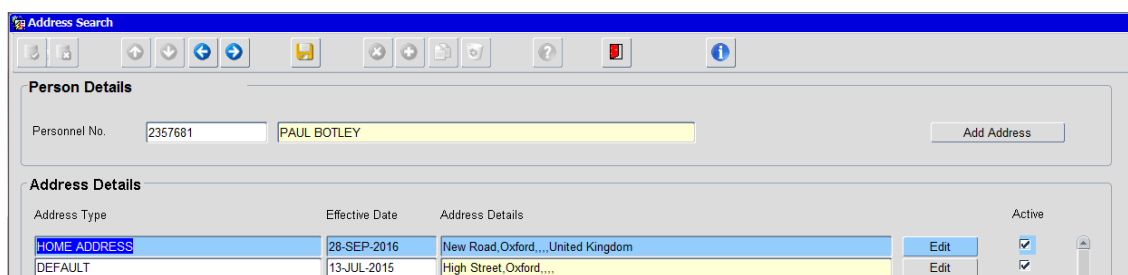
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4.2 Click on .



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



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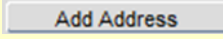


Note: You should only add a Label Address (Payslip) if payslips are to go to an address other than the Location or Home Address **and** Payroll have been informed of this requirement.



If an employee is working overseas it is essential that their address is added in **ADDLAB**. Payroll must be informed.

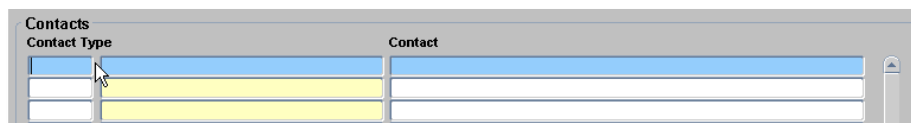


Note: To add further addresses, click the  button.

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.



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 .

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

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

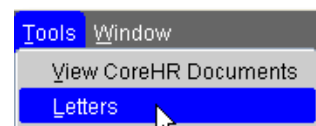


Note: It is important to create a new contact entry for each piece of information. E.g. when recording a home email in addition to a work email, select a new contact line for each email being recorded – do not merge multiple email information onto one line.


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**.



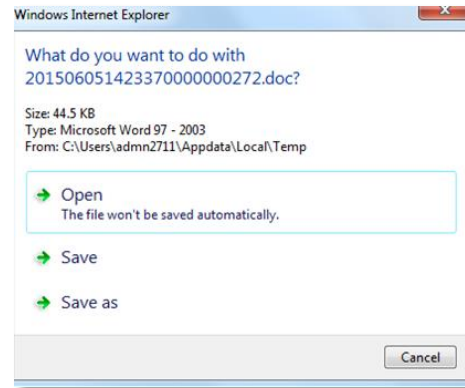
5. The *Generate Letters Module* window opens:

A screenshot of the 'Generate Letters Module' window. The window title is 'Generate Letters Module' and it has a user ID 'HR0155' in the top right. Under the heading 'Select Letter Type', there are three dropdown menus: 'Letter Group' set to 'POST APPOINTMENTS', 'Letter Type' set to 'CONDITIONAL OFFER LETTER', and 'Options' set to 'Perform Mail Merge'. At the bottom, there are two radio buttons for 'Selection': 'Current Record' (which is selected) and '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**.


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



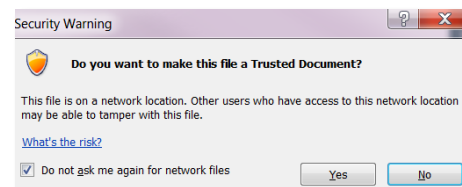
- 12. The Word document will open.
- 13. If the message below appears at the top of the page click on **Enable Content**.




- 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 .

 **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'.

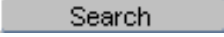


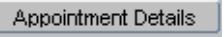
 If the document is saved as a .docx you will not see the above Security Warning message when reopening a saved document.

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.

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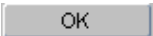

F. ♦ Commencing the individual

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 **Post Number** 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 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.

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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**.

The screenshot shows the 'Maintain Approvals' interface. It includes search fields for Personnel No. (002006) and Name (HELEN WOODSTOCK), a Department field, and a Pay Group dropdown. A 'Select Detail' dropdown menu is open, showing options: 'My Approval Items' (selected), 'All Outstanding Items', 'View All Rejected Items', and 'View All Approved Items'. There are 'Search' and 'Clear' buttons. An 'Order By' section on the right has radio buttons for 'Reason', 'Effective Date', and 'Personnel No., Effective Date, Reason'. Below this is a table titled 'Detail - Approval Items'.

Personnel No.	Allowances Only	Effective Date	Reason	Pay Scale	Point	Rate Type	Rate Of Pay
002006	HELEN WOODSTOCK	<input checked="" type="checkbox"/>	01-APR-2018	NEW ADDITIONAL APPOINTMENT	X99	Casuals	1 Annual 0.01000

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

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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].**

3. Check the New Salary data is correct:

Field Name (* mandatory)	Description
Effective date *	Start date of appointment.
Pay scale *	X99
Point *	1
Rate of Pay *	0.01000
Multiplier *	0.00
Actual Pay *	0.00

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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]**.



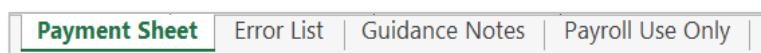
Note: If you have rejected a salary it is important to make separate contact with full details to notify the requestor of the reason for the rejection as this will not be visible to them in CoreHR.

5. Click . A message appears asking you if you are sure you want to approve/ reject this salary amendment. Click . 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.**

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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 to correct the entry.

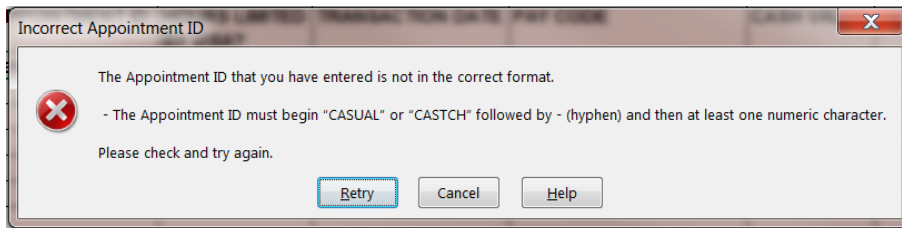
If a critical field is left blank or conflicting entries are made, e.g. an hourly Pay code is selected but a cash value is entered, the field(s) will be highlighted in red and an error message will be displayed in the 'Error List' tab.

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:




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.

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

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		<p>GL and Proj denote source of payment (H) = hourly rate (C) = cash value</p> <p>The option chosen here will determine which other fields must be completed.</p>
	<p>Cash Value Required if the chosen paycode ends with (C)</p>	<p>Enter the amount to be paid. NB: Restricted to certain pay codes e.g. Expenses.</p>
	<p>Hours value Required if the chosen pay code ends with (H). * mandatory for tier 4 workers</p>	<p>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</p>
	<p>Rate of pay</p> 	<p>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.</p>
	<p>Cost Centre Required if the chosen Paycode contains GL</p>	<p>Enter the relevant GL code, e.g. GL0000000000 (i.e. cost centre, activity & source of funds)</p>
Costing details*	<p>Project Required if the chosen Paycode contains Proj</p>	<p>Enter the relevant Core project code, e.g. PR000000.0000</p>
Additional details	<p>Comment</p>	<p>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.)</p>
Line total		<p>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.</p>

Paying for piecework

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



Note: Further guidance on the requirements for gender pay gap reporting including FAQs can be found on the [Reward team website](#).

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 <https://www.infosec.ox.ac.uk/> 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.

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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:

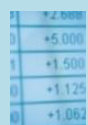
- Individual's last working day is Friday 23 October 2016
- Payment request submitted with a week/period end date of Sunday 25 October 2016
- Earliest end date that can be entered against the appointment in Core is 25 October 2016
- Appointment can be ended after the payroll has been run i.e. on or after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

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

In the Leaving Details section:

Field Name (* mandatory)	Description
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.

Useful Reports




1	+2.0000
2	+5.0000
3	+1.5000
4	+1.1250
5	+1.0625

- To search for active project codes run: [PERDEP13 Active Cost Centres and Project Codes](#)
- To help track new appointments and leavers don't forget to regularly run: [PERDEP20 Monthly Personnel changes](#)
- To check for data quality exceptions run report: [HRINFO20 Data Quality Validation for Casuels](#).

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K. APPENDIX

	A	B	C	D	E	F	G	I	J	K	L	M
1	 <p style="text-align: center;">University of Oxford - Casual Payment Submission Template</p> <p>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.</p>											
2												
3	SURNAME	INITIALS	EMPLOYEE NUMBER	APPOINTMENT ID	HOURS LIMITED BY VISA?	WEEK/PERIOD ENDING	PAY CODE	HOURS VALUE	RATE OF PAY	COST CENTRE	PROJECT	COMMENT
4	EXAMPLE	A	1234567	CASUAL-1	Yes	29-Jan-2017	Admin - Proj (H)	10.00	8.58		PR000000.0000	
5	EXAMPLE	B	1234569	CASTCH-001	No	23-Jan-2017	Casual Labour GL (H)	10.00	8.94	GL000000000000		
6												