

IP5 - Capturing outside appointments

In conjunction with guidance from Personnel Services, this guide should be used to ensure that outside appointment data is captured in Core. Use the data from the completed '[Application form OA1](#)' to fill in this UDF.

What's changed?

1. Updated to include new report details
Mar17

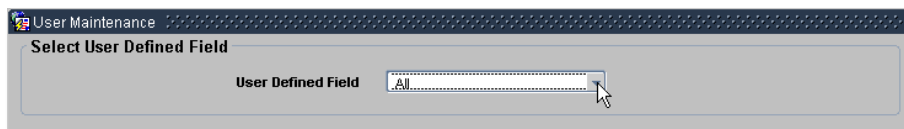
This guide covers the following process steps:


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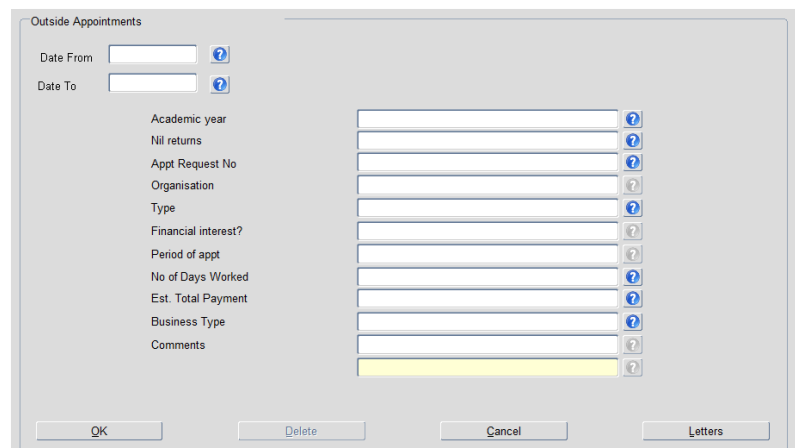
Navigate to: Personnel > Maintenance > Personal Profile

Entering outside appointment data

1. Search for and open the employee record and go to **Select box > Other Person Details**. The *User Maintenance* window opens.




2. Click to display **User Defined Field** List of Values.
3. Select the required option **Outside Appointments**.
4. Click .



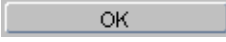
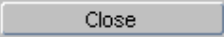
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5. Complete the relevant details:

Field Name	Guidance
Date From*	Enter the date the appointment was approved by the Head of Department. (See part 9 - Form OA1)
Date To	Leave blank. Entering a date into this field will mean that the UDF screen won't be returned in reports.
Academic year	Select the academic year in which the outside appointment will take place. A new record must be set up for each year the outside appointment applies , eg where an outside appointment runs from 1 June to 31 December, two records must be set up – but the appointment request number (field: 'Appt Request No'), needs to be the same.
Nil returns	Academic staff only: Update this field at the end of the current academic year for academic staff who had not undertaken any outside appointments this academic year. Select Y to confirm a nil return. (See: Form OA2). Do not fill in any further information if there were no outside appointments.
Appt Request No	Select a number in sequence for each outside appointment held by the individual. The first appointment = 01 , the second appointment = 02 and so on. A new record must be created for each separate or new outside appointment.
Organisation	Enter the name of the organisation with which the outside appointment is held, please include the city location.
Type 	Select the relevant type from the list. (See part 2 - Form OA1) If an appropriate description is not listed select Other and include details in the Comment field below.
Financial interest?	If relevant, record details of any financial interest or shareholdings in this external organisation held by the employee. (See part 3 - Form OA1)
Period of appt	Record the expected start end dates of the outside appointment, eg '01/07/2016 – 30/09/2016. (See part 4 – Form OA1)
No of Days Worked	Select the number of days that will be worked in this academic year. A new record must be created in cases where the appointment overlaps between two academic years . The number of days worked recorded must reflect the actual number of days worked within the academic year chosen above. If the outside appointment spans more than 12 months, please ensure that a new entry is made in Core, recording the extra days beyond this 12-month period.
Est. Total Payment	If relevant, and if known, select the estimated value of the payment for the appointment. (See part 6 (a) - Form OA1)

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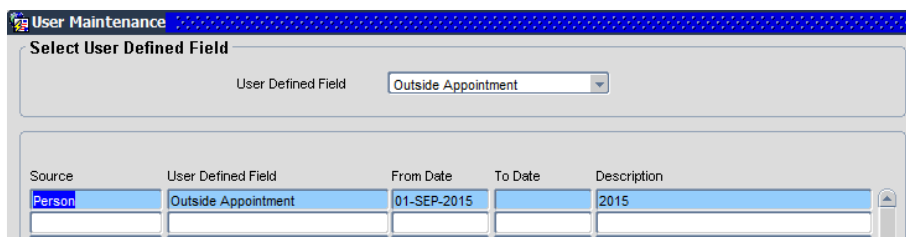
Business Type	Select the business type. (See part 6 (b) - Form OA1) If not known, leave blank.
Comments	Enter additional comments as required, eg Where selected 'Other' above.


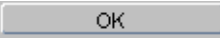

- Click , then  and  to exit the Outside appointments screen.

Amending outside appointment data

Having captured this information, if you need to amend or add to the record at a later date.

- As above, on the *Personal Profile* go to **Select** box > **Other Person Details** and click into the relevant **Outside Appointments** line:



- Click  to open the record and amend as required.
- Click , then  to exit the Outside appointment screen.

	+2.588
0	+5.000
1	+1.500
0	+1.125
0	+1.062

Useful Reports:

To view all outside appointments details entered in a UDF for academic and related staff, run **PERDEP48 Outside appointments**.