PERSONNEL SERVICES

UNIVERSITY OF OXFORD

HRIS PROGRAMME

Quick Reference Guide: New Starter

Note: This guide is relevant for new starters to the university and employees appointed to a new appointment

v2.9 February 2013

Processing a New Starter

More detailed information regarding the individual and their appointment can be captured before they arrive or on their first day as preferred.

Note:

***** indicates mandatory fields which must be completed.

What's Changed? (6/2/13)

New Starter Additional Details (p8)

- Guidance on use of Opt Out field removed in preparation for Pension Auto-enrolment.

Useful Reports

To help track probation or work permit dates don't forget to regularly run:

PERDEP40_Probationary Dates Due

PERDEP41_Work Permits

NOTE: Different address details are held in different areas of CoreHR:

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 Maintenance	• This should be entered on the person homepage (not on the contact details drop down). • Necessary for HMRC purposes and must cover two lines. • Remember to tell Payroll if payslip is to go to this address.
AddLab – Label Address (Payslip)	Person Profile Maintenance (Contact Details screen)	• Only complete this if payslips are to go to an address other than the Location or Home Address and Payroll have been informed of this requirement.

A. Person-related Details

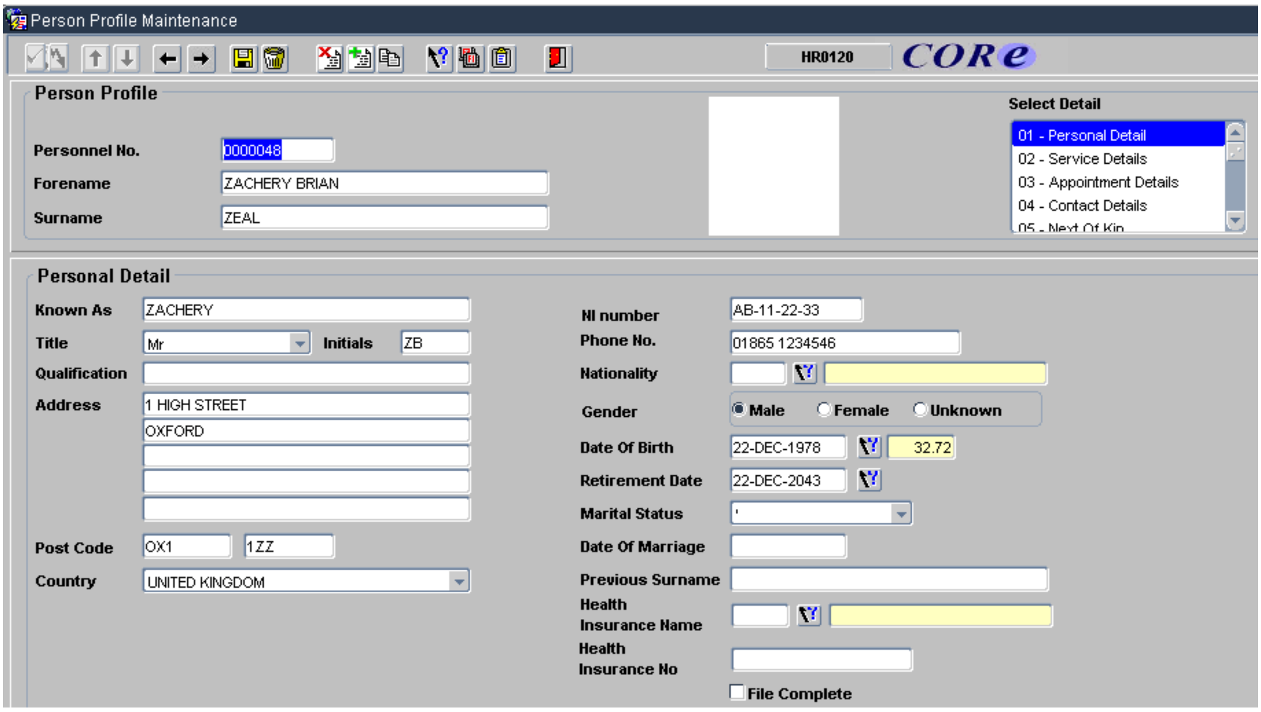
Once a new starter has arrived various person-related information must be input to ensure their personnel record is set up correctly.

Note: This information should be completed on the New Starter's first day or as soon as possible afterwards. If some of the information is available, it may be captured earlier. Refer also to the **New Starter checklist**.

Navigate to: Personnel > Maintenance > Personal Profile

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* (*HR0120)* window opens:



A1. Personal Details

2. Confirm personal details are correct/complete e.g. name, home address, gender, date of birth, NI number, etc. In particular:

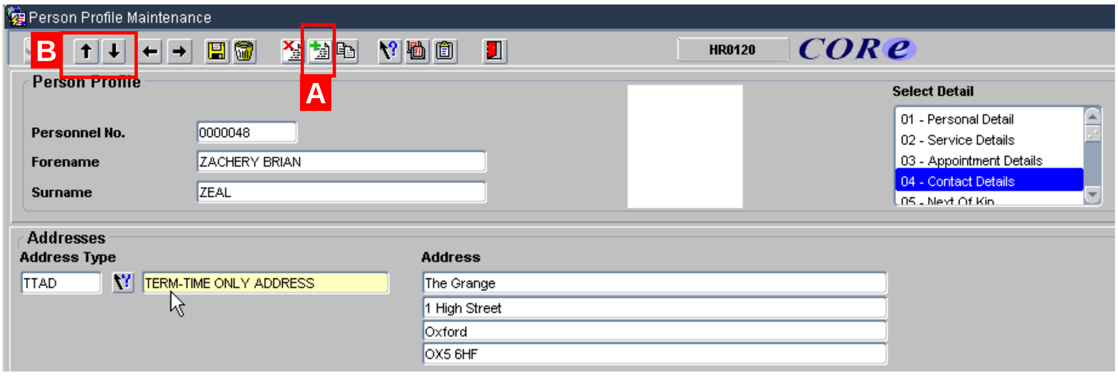
Field Name (* mandatory)	**Guidance**
Forename *	If relevant, this should include all middle names. Name must be in full. E.g. Zachery, not Zac.
Known As *	First name only. This is the name used in the set-up of the email address. This can be a shortened name if preferred.
Initials	Check initials are for forename and middle names.
Address *	A minimum of two lines must be completed. If for any reason the address is not known this should be noted over two lines i.e., Address Unknown
Post Code *	Check this is entered correctly over the two fields – may come through

	from e-recruitment as one field.
NI number *	When entering this, if you receive a warning message that the number is a duplicate you should contact HRIS Support.
Gender *	Update if necessary – this may come through from e-recruitment as 'Unknown'.

A2. Contact Details

Note: See note on p3 before adding additional address information in this area.

If additional contact details are required these can be added as below:



1. Go to **Select Detail** box > **Contact Details.**

2. Address Type: Select the relevant type(s) from the LoV and record additional address details e.g. second home, term time address.

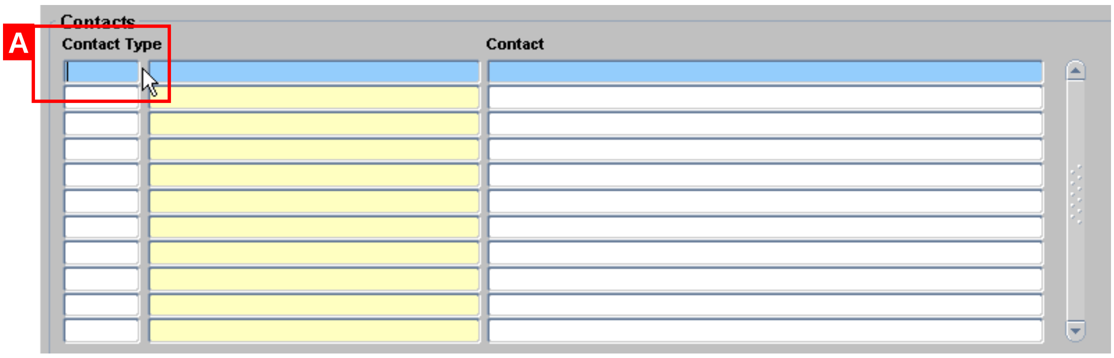
Note: There should only be an address in **ADDLAB** if payslips are to go to an address other than Location or the Home Address. Payroll must be informed of this requirement.

3. Click .

Note: To add further addresses, click the Insert New Record button in the toolbar **[A]**. To view additional addresses, click the Move to Previous/Move to Next Record arrows **[B]**.

Additional Contact Information

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. home email address, mobile number:

1. Click in the **Contact Type** field **[A]**.

2. Click the button in the Tool Bar.

3. Select the relevant value from the list. Click .

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

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

A3. Oxford Pay Group (Departmental Pay Group)

Code used by Payroll as a means of distributing work to the relevant Payroll Officer. Format is a letter and two digits, e.g.: H05,A11, etc.

Note: If your new starter is taking on an additional post which has higher FTE/working hours than their current appointment, change (overwrite) the Oxford Pay Group to the new code. However, for additional appointments with less FTE/working hours than the current appointment, leave as is.

1. Follow steps 1& 2 above.

2. Select **Oxford Pay Group** from the list. Click .

3. Enter the relevant details into the **Contact** field. Click .

A4. Next of Kin (Emergency contact)

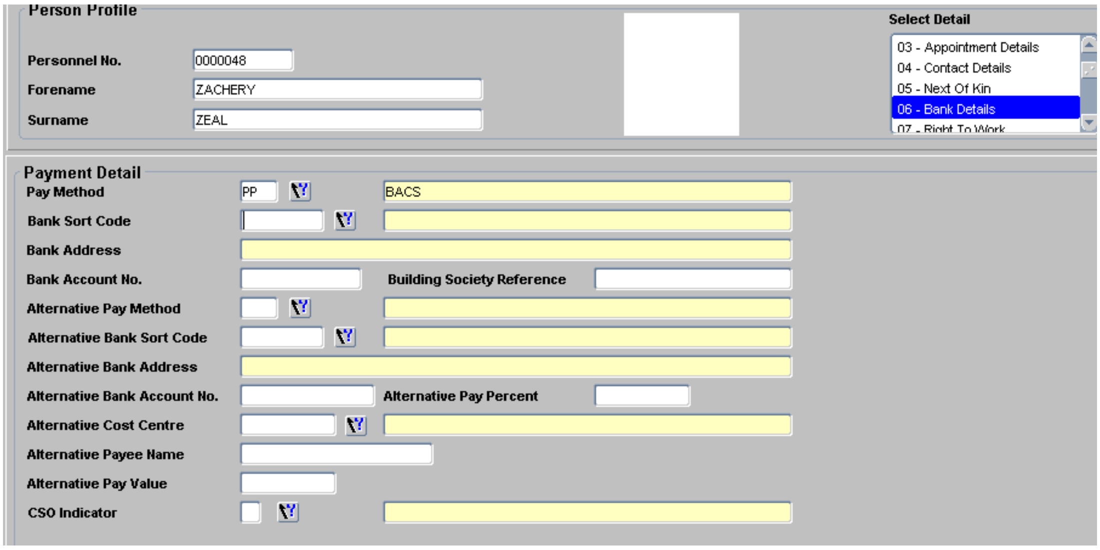
1. Go to **Select Detail** box **> Next of Kin**.

2. Enter next of kin information as required.

3. Comments: If required, details of a second emergency contact can be stored here. Click .

A5. Bank Details

1. **Go to** Select Detail **box** > Bank Details**:**



2. Enter bank information.

3. Select **Pay Method**: BACS.

4. Enter **Bank Sort Code**, Press **Tab** (bank name/address is auto-populated).

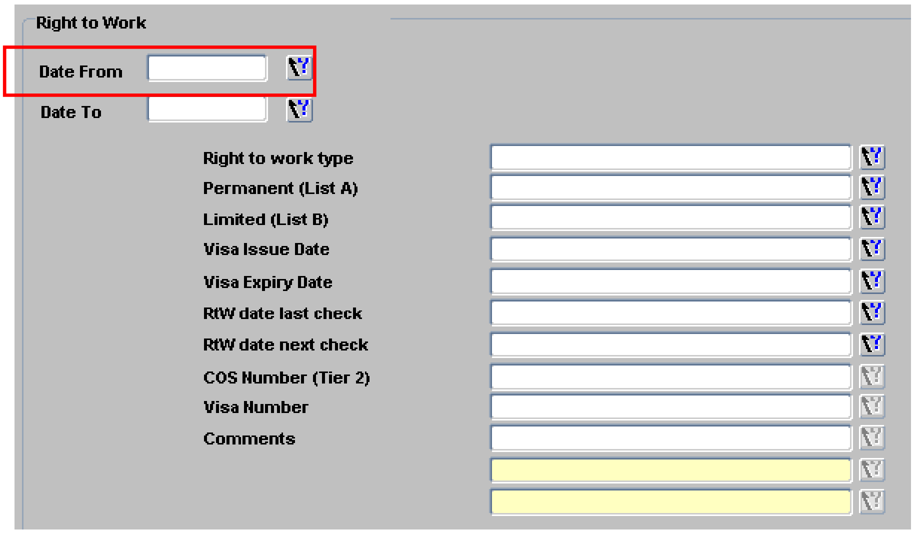
5. Enter **Bank Account No** (and **Building Society Ref** if relevant). Click .

Note: <u>**Do not**</u> enter any Alternative payment details.

<u>A6. Right to Work</u>

1. Go to **Select Detail** box **> Right to Work**.

2. Click New.



3. Select (or type) **Date From**.

4. Right to Work type – from the LoV choose either **Permanent and Unrestricted (List A)** or **Limited (List B)**.

5. Pick from **List A** or **List B** as relevant and complete other fields as appropriate.

6. Click OK , then OK and Close .

A7. Other Details (Person-based)

Other important details must be recorded including:

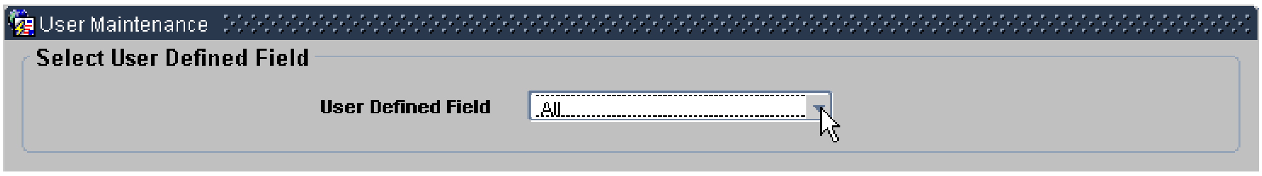
a. New starter additional details (Pension/opt out and tax documents).

b. Previous HEI Employment (previous employment at a HEI, critical for HESA purposes).

c. Roles within Department (e.g. Head of Department) – if relevant.

For each of these:

1. Go to **Select Details** box > **Other Details**. The *User Maintenance* window opens.



2. Click to display **User Defined Field** List of Values.

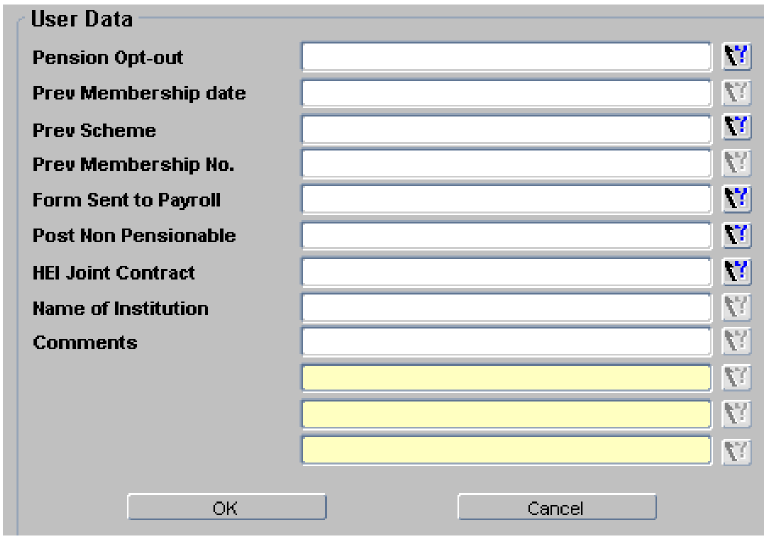
3. Select the required option (a, b or c as below)

a. Select *New Starter Additional Details*

4. Click 

.

5. Enter the **Date From** (start date of the appointment).



6. Complete the relevant details:

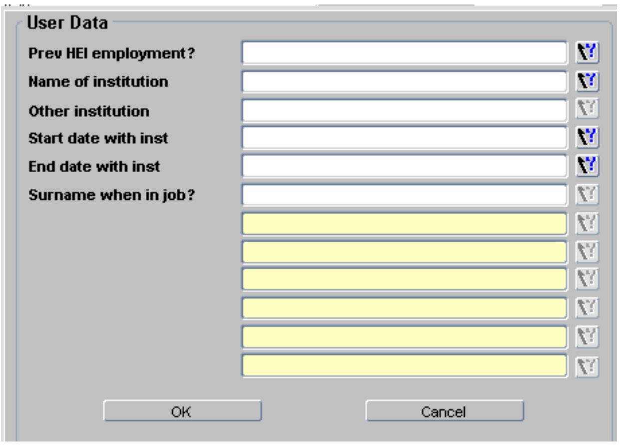
Field Name (* mandatory)	**Guidance**
Pension Opt-out	Do not use
Prev Membership date	Enter the last date of membership.
Previous Scheme	If relevant, select the scheme the new starter has previously been in.
Prev Membership no.	Enter the relevant membership number.
Post Non Pensionable *	Select if the post is not pensionable.
Form Sent to Payroll	Select the relevant documents sent to Payroll, e.g.,P45. **Note:** A cover sheet can be generated to be sent to Payroll with any tax forms.
HEI Joint contract *	Select Yes or No as relevant.
Name of institution *	Enter the name of the other HEI if another UK HEI is involved in the contract. This does <u>not</u> include Oxford Colleges.
Comments	Add any additional notes for Payroll/Pensions as required.

7. Click OK, then OK.

Before an individual is set up on payroll it is important to ensure that the correct tax documents have been received. **Note**: If the individual does not have the correct documents they should be issued with a P46 or P38 for completion.

b. Select *Previous HEI Employment*

NOTE: Even if an individual has never worked at a HEI it is still important to complete this section and select **NO** for **Prev HEI employment?**



Repeat 1-3 above.

4. Click New.

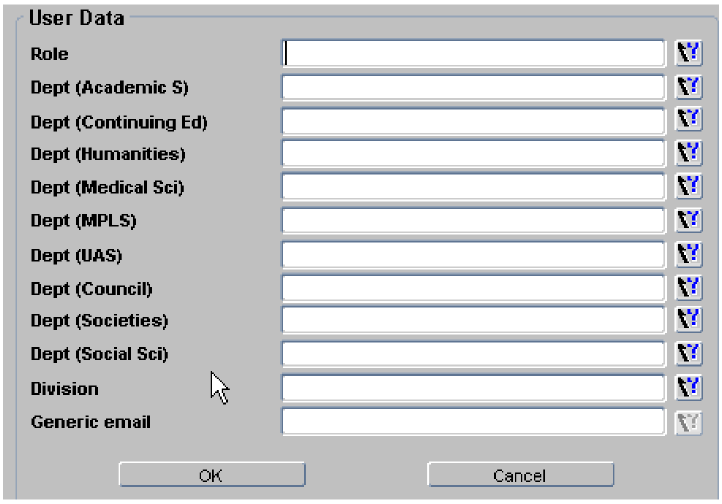
5. Enter the **Date From** (start date of the appointment).

6. Complete the relevant details.

7. Click OK, then OK.

c. If relevant select *Roles within Department*

For specific roles within a department e.g. Head of Department, Departmental Administrator etc., flagging of these roles against an individual will link them into central, automatically generated mailing lists, including via use of generic e-mail addresses if preferred e.g. administrator@department.



Repeat 1-3 above.

4. Click New.

5. Enter the **Date From** (start date of the appointment).

6. Complete the relevant details:

Role – select appropriate.

Dept – select relevant department from the appropriate Divisional listing, or Division if it is a divisional role.

7. Enter **Generic email** address if required.

8. Click OK, then OK and Close.

Note: For central mailing lists to remain up to date and role holders to be properly informed, it is essential that these 'role' details are accurately maintained.

B. Log Qualification & Immediately Previous Employment

To complete a new starter's personnel record, qualification and employment history details should be entered into Core Personnel. Much of this data is required to support the University's internal and external reporting obligations.

> **Note:** For new starters who applied through eRecruitment where the vacancy used the long application form, the qualification and immediately previous employment details will be fed through from the application form.

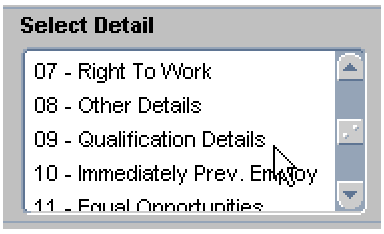
B1. Qualification Details

If these have been fed through from the application form they should be checked for completeness.

> **Highest qualification details must be entered**; others can be input in accordance with local requirements.
> For rehires/ transfers **do not enter qualification details again** if they are already there from the previous appointment, but update where necessary.

Navigate to: Personnel > Maintenance > Personal Profile

1. Go to **Select Detail** box > **Qualification Details**.

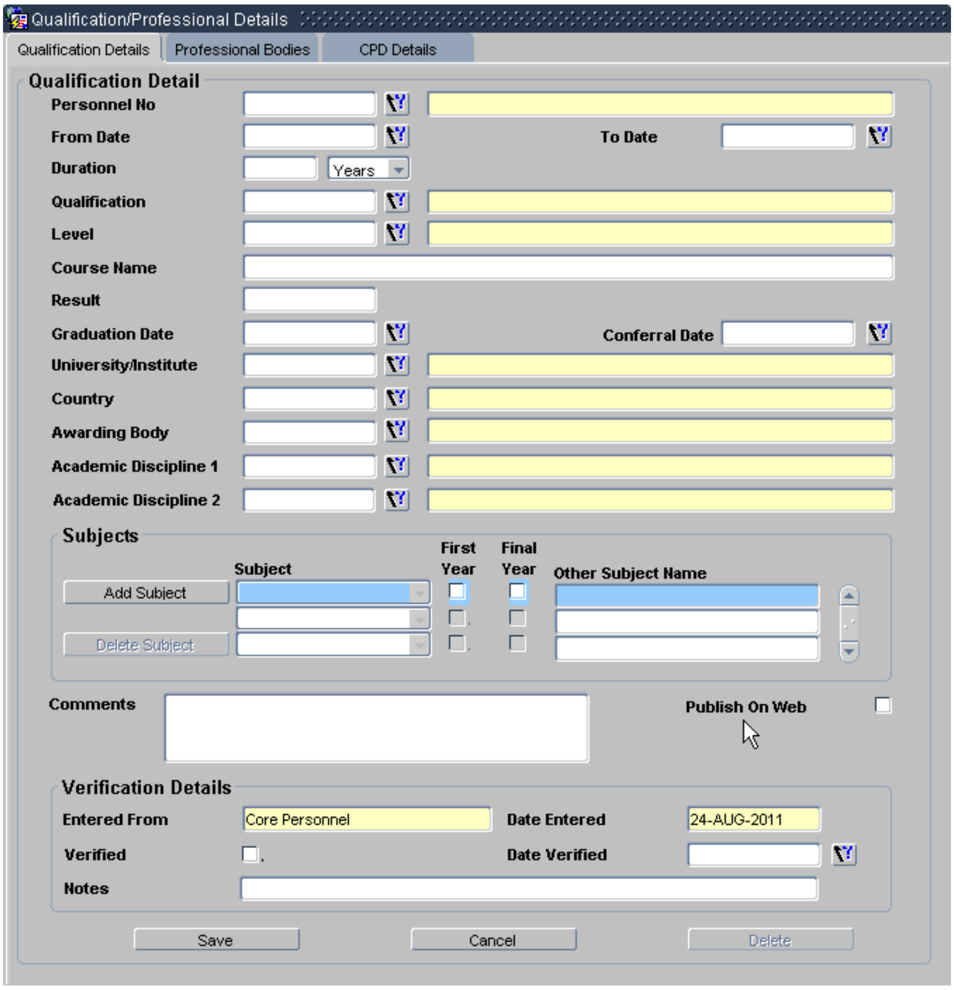


2. Ensure the search is set to **All** – any qualifications already captured will be shown in the **Search Results** area.

> **Note:** The system may display a message stating that the employee has no qualification records, click on **OK** to acknowledge the message.

3. Click the 

button. The *Qualification/Professional* details window opens:



4. Enter **Personnel number** or click on the LoV button and search by name and click Find.

5. Enter details into all three fields as below:

Field Name (* mandatory)	**Description**
Qualification*	Select from list.
Course Name *	Enter **name of course and level**, e.g. NVQ Level 2, BA (Hons) Business Studies.
Comments *	Confirm subject areas.

6. If preferred, enter any other details of note e.g. Graduation Date.

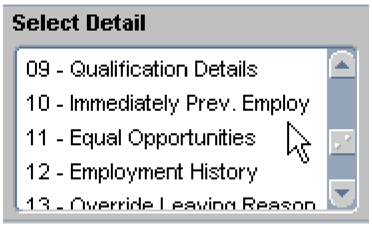
7. Click Save.

8. to return to return to the *Person Profile Maintenance (HR0120)* screen.

B2. Employment History Details

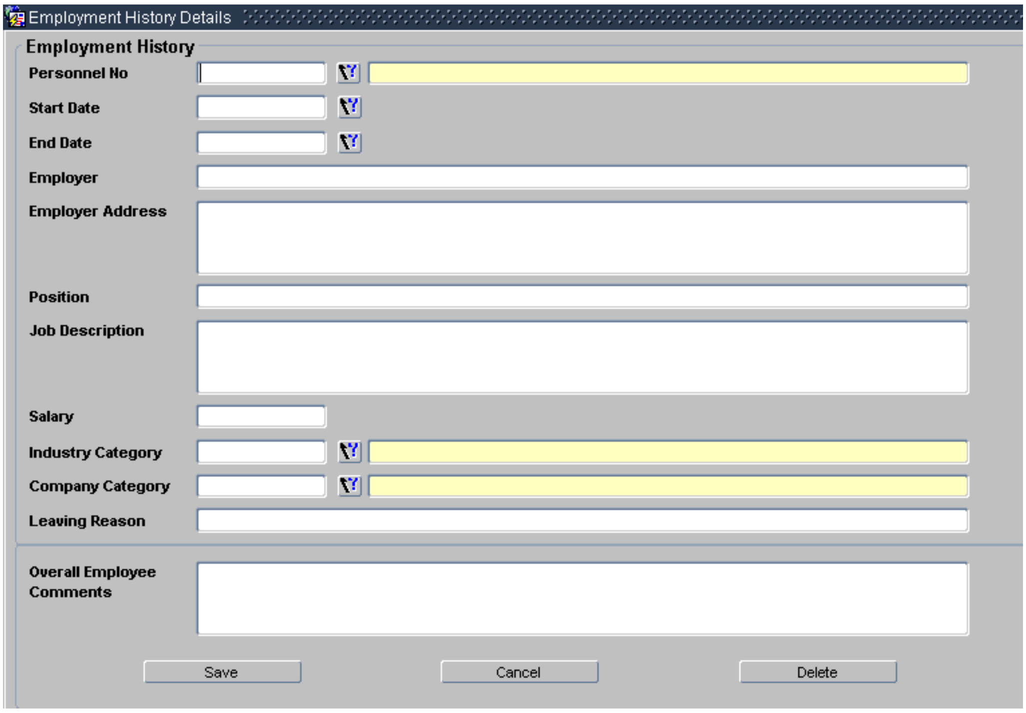
For details that have been fed through from the application form refer to point **8** onwards below.

1. Go to **Select Detail** box > **Immediately Prev. Employ**.



2. Click 

. The *Employment history* details window opens:



Details given here should cover what the individual was doing immediately before being employed by the University whether it be in paid employment or not, e.g. student, unemployed etc. A small break between appointments, e.g. a holiday can be ignored. **Note:** Do not forget, you will separately need to flag whether or not the individual has ever worked for an HEI (see Section A7).

3. Enter **Personnel number** or click on the LoV button and search by entering name and clicking **Find**.

4. Enter details as below.

Note: Details must be completed whether the employment was in the UK or overseas.

Field Name (* mandatory)	**Description**
Start Date *	Start date of most recent activity/employment.

End Date *	End date of most recent activity/employment (if applicable).
Employer *	Name of organisation where the individual was employed or carried out the activity. Enter *n/a* if not working/student/volunteer.
Position *	Complete as applicable, or enter student/volunteer as appropriate. Enter *n/a* if not working/student/volunteer.
Industry Category *	Pick from list of values available.
Company Category *	If the previous employer was a UK HEI, pick the University name from the list.

5. Enter any other details of interest e.g. **Leaving Reason**.

6. Click Save.

7. to return to return to the *Person Profile Maintenance (HR0120)* screen.

For details that have been fed through from an application form

8. Go to **Select Detail** box > **Immediately Prev. Employ**.

9. The details entered onto the application form are shown in the Employment History section.

Employment History

Personnel No	Name	From Date	To Date	Employer	Position	Industry Category	Company Category
2500061	ZACHERY ZEAL	05-JUN-2000	31-DEC-2009	JONES LTD	Junior Manager		
2500061	ZACHERY ZEAL	01-JAN-2010	01-DEC-2011	Smiths & Co	Manager		
2500061	ZACHERY ZEAL	02-DEC-2011	02-FEB-2012	n/a	n/a		
2500061	ZACHERY ZEAL	03-FEB-2012	30-MAR-2012	Book House	Temporary Supervisor		

10. Select (double click) the entry that is immediately previous to their appointment at the University.

Note: If there is no immediately previous entry, follow the guidance from 1 above to add a new entry to the list.

11. Complete the details as below:

Field Name (***** mandatory)	**Description**
Industry Category *	Pick from list of values available.
Company Category *	If the previous employer was a UK HEI, pick the University name from the list.

12. Enter any other details of interest e.g. **Leaving Reason**.

13. Click Save.

14. to return to return to the *Person Profile Maintenance (HR0120)* screen.

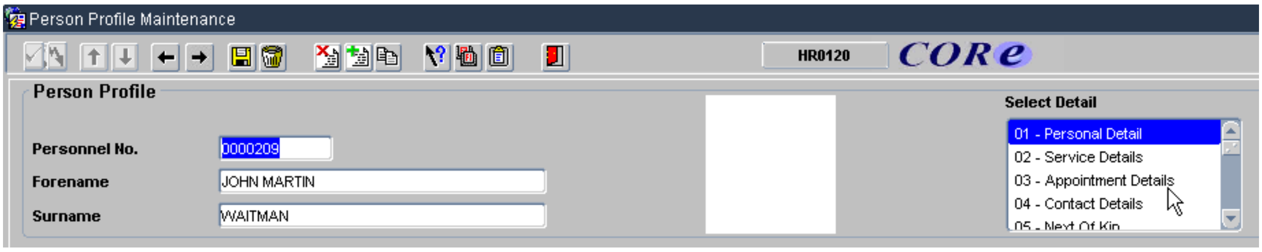
C. Appointment-related Details

Once a new starter has arrived various appointment-related information must be added to their personnel record. This guide focuses on funding and bank details, and is separated into a number of sections which should be followed in order.

> **Note:** This information should be completed on the New Starter's first day or as soon as possible afterwards. If some of the information is available, it may be captured earlier. Refer also to the **New Starter checklist**.

Navigate to: Personnel > Maintenance > Personal Profile

1. 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 (HR0120)* window opens:



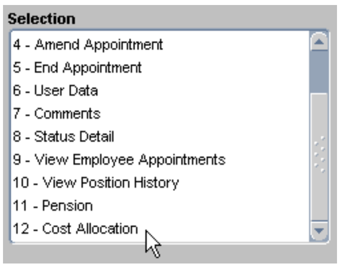
2. Go to **Select Detail** box > **Appointment Details**.

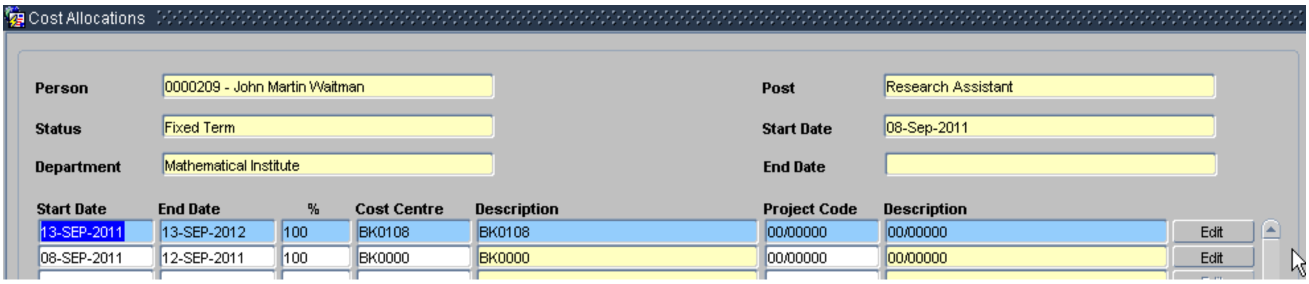
3. If relevant, click into the **Post Number** to ensure the correct appointment is highlighted. Click the [Appointment Details] button. The *Post Appointment Maintenance (PER620)* window opens.

C1. Cost Allocations

> If funding/cost details have changed since the new starter was appointed they should be updated at this stage.

1. Go to **Selection** box > **Cost Allocation**.





2. Review the cost information against the appointment. If necessary click on Edit to amend the details or Add Allocation to add a new cost allocation line.

3. Complete details as below.

Field Name (* mandatory)	**Description**
Start Date *	Enter the start date for the new cost allocation (should be the same as the appointment start date).
End Date *	Enter the end date if relevant.
% *	Enter **%**, e.g. 100, 50. **Note:** allocation may be split between more than one Cost Centre, but the total allocation must add up to 100%, even where the FTE is less than 1.
Cost Centre *	Select or enter relevant GL or project code. **Note:** You can type cost centre straight into the field, but it must be in upper case. Cost centre search will look within the Name and Code fields together, therefore when searching for a cost centre code you need to prefix the search criteria with a wild card '%'. E.g. to search for codes starting DKRR enter search criteria *%dkrr* (search field is not case sensitive). Name is displayed first in the search results but you can scroll right to see the codes.
Project Code *	Select or enter relevant task/activity.

5. Click Save then OK . You are returned to the *Cost Allocations* window.

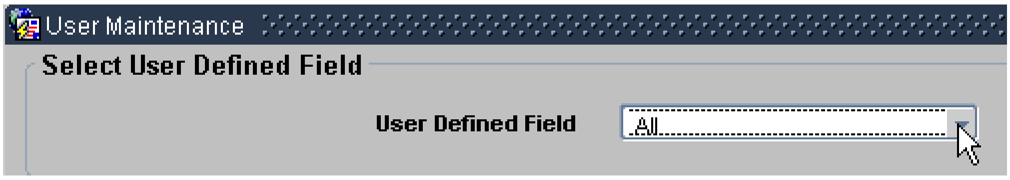
6. Click Close. You are returned to the *Post Appointment Maintenance (PER620)* window.

C2. Additional Funding Information

Where the cost centre code does not reflect the source of funds, additional information must be provided. This is important for PRAS to be able to then define the HESA source of funds.

E.g. where a suspense code is being used whilst awaiting a 'true' cost centre to be set up, or where a GL code is being used to administer externally funded appointments.

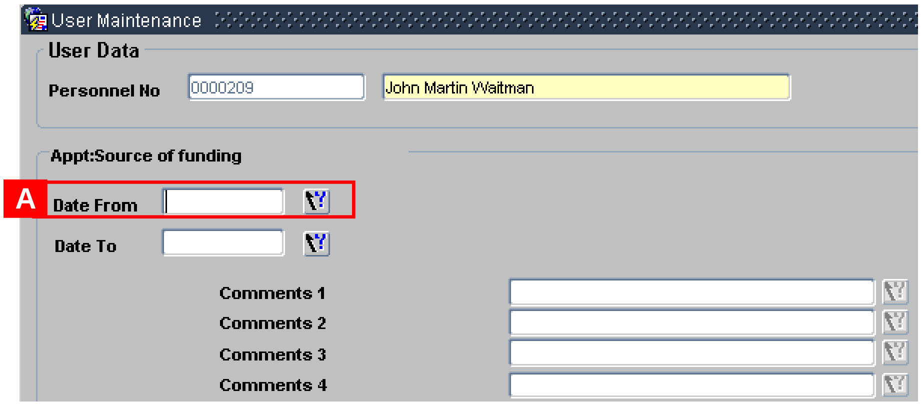
1. Go to **Selection** box > **User Data**. The *User Maintenance* window opens.



2. Click to display **User Defined Field** List of Values.

3. Select **Appt: Source of Funding**.

4. Click New.



5. Enter the **From Date** (start date of the appointment) **[A]**.

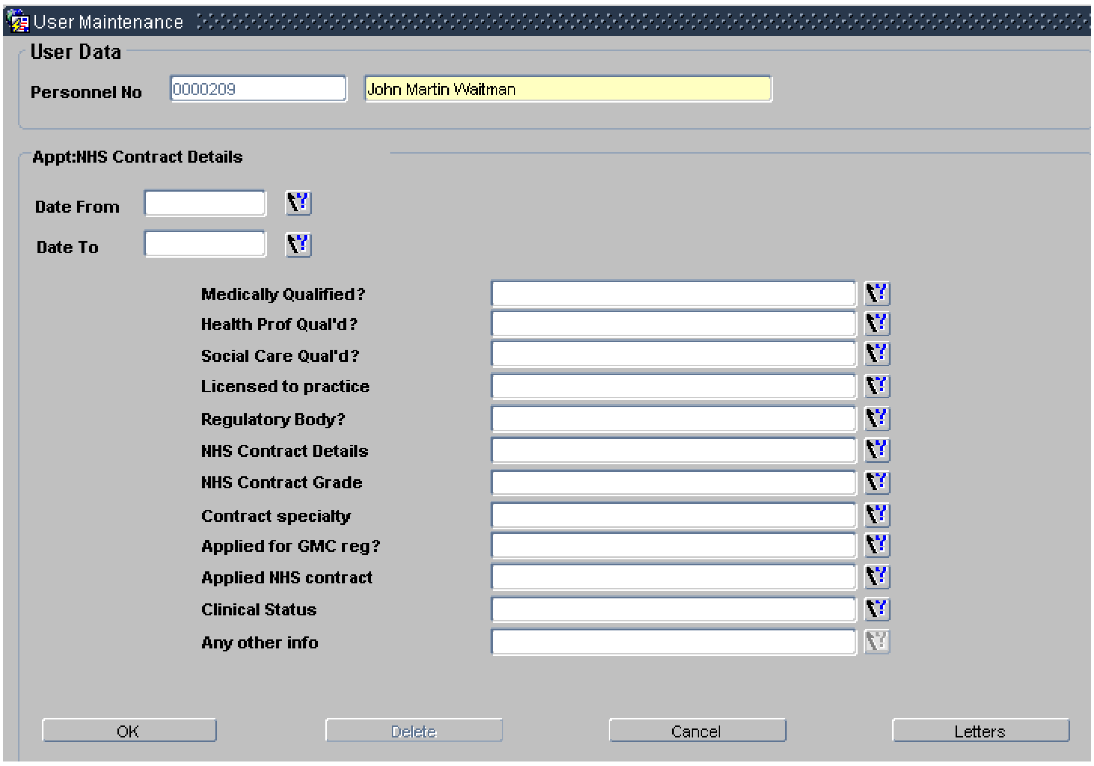
6. Add Comments regarding funding as required. Click OK. A 'transaction complete' message will appear. Click OK.

C3. Medical/Health/Social Care Qualifications

> **NOTE:** This UDF should be completed for all appointments which require medical, health or social care qualifications.

1. Select **Appt: NHS Contract Details**.

2. Enter the **Date From**. This should be the appointment start date.



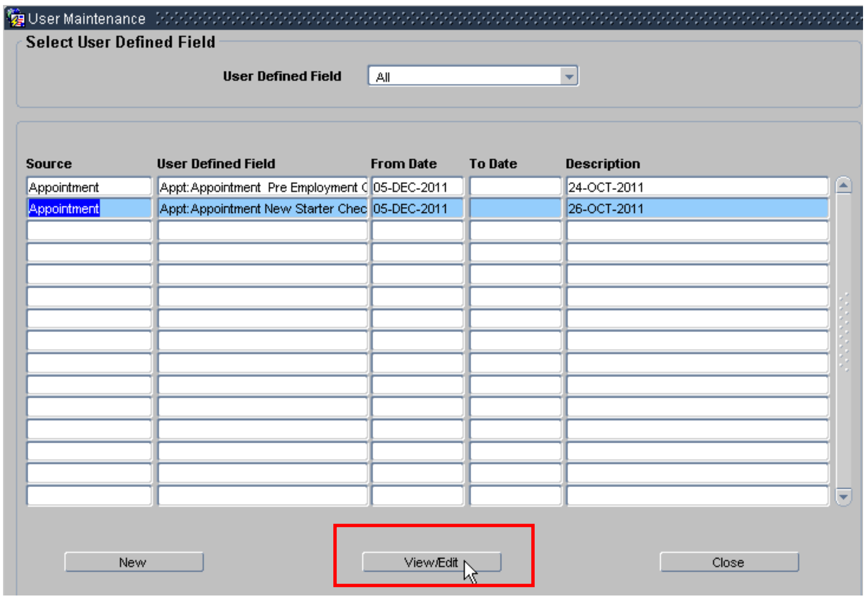
3. Complete the details as relevant:

Field Name (* mandatory)	**Description**
Medically Qualified?	Select **Yes**, **No** or **Not Applicable** as appropriate.
Health Prof Qual'd?	Select **Yes**, **No** or **Not Applicable** as appropriate.
Social Care Qual'd	Select **Yes**, **No** or **Not Applicable** as appropriate.
Licensed to practice	Select **Yes**, **No** or **Not Applicable** as appropriate.
Regulatory body?	Select relevant body with which the individual is registered.
NHS Contract Details	Select appropriate contract type.
NHS Contract Grade	Select appropriate contract grade.
Contract speciality	Detail any speciality associated with the contract e.g. surgery, midwifery etc.
Applied for GMC reg?	Indicate if the individual has applied for (but not yet received) GMC registration.
Applied NHS contract	Indicate if the individual has applied for (but not yet received) an NHS contract.
Clinical Status	Select appropriate category.
Any other info	

4. When relevant checks have been recorded click OK. A 'transaction complete' message will appear. Click OK.

C4. Update Status of New Starter Checks

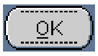
1. Assuming new starter checks have been partial completed already (see **QRG PA0 section H: New Starter Checks**) select the **Appt: Appointment New Starter Checks** line and click View/Edit.



2. Select each individual check to record the date that the event or check happened.

Field Name (* mandatory)	**Description**
Bank Details OK *	Confirm bank details supplied and entered into Core.
Person Details OK *	Confirm personal details supplied and entered into Core.

3. When relevant checks have been recorded click 

. A 'transaction complete' message will appear. Click 

. Exit all windows back to the Personnel main screen.

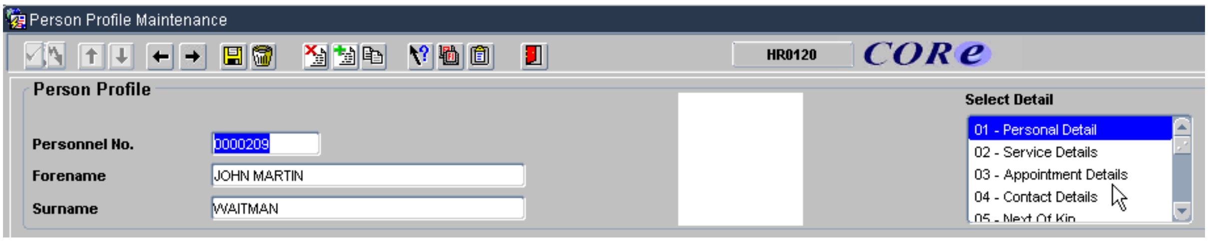
D. Commence Employee (First Day)

As a final stage before the new starter is set up on payroll, it is necessary to 'commence' their appointment within Core Personnel.

> **NOTE: Commencement should normally happen on or as soon as possible after the new starter's first day, but future commencement is possible if all details are complete. Currently this can only be done for new employees starting within the current payroll month.**

Navigate to: Personnel > Maintenance > Personal Profile

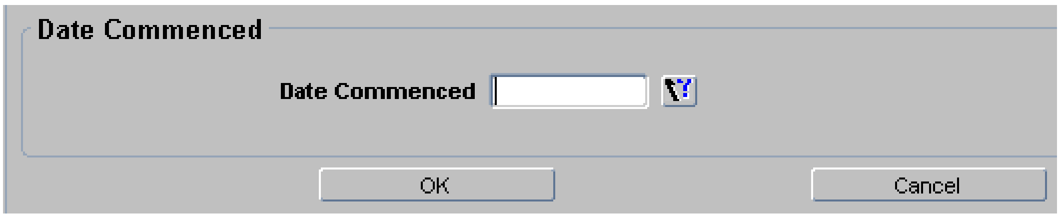
1. Enter search criteria e.g. Name (**Surname** followed by first initial) or **Personnel No**,click [Search] and open the relevant employee record. The *Personal Profile Maintenance* (*HR0120)* window opens:



2. Go to **Select Detail** box > **Appointment Details**.

3. Click into the **Post Number** to ensure the correct appointment is highlighted. Click the [Appointment Details] button. The *Post Appointment Maintenance (PER620)* window opens.

4. Go to **Selection** box > **Commence Appointment**.



5. Select (or type) the actual start date into **Date Commenced**.

6. Click [OK]. Click [Save] then [OK].

7. Finally, go to **Selection** box > **View Position History** to check that the salary details are all as expected.

> **Note:** If the salary has not been set up correctly refer to QRG Change: Pay (CH5) for guidance.

E. Set up Allowances

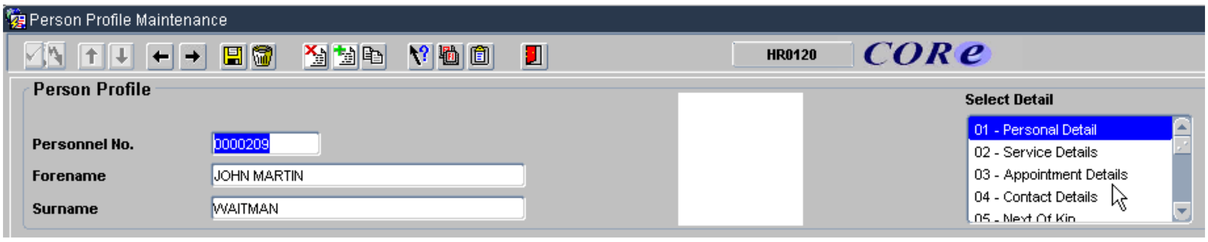
Where allowances (e.g. for callout, clothing, etc) are required they will need to be set up and approved within the CoreHR system. Approvers should refer to **Section F** or ***QRG: Approve/Reject Salary/Allowances (FD5)*** for guidance on approving.

Note: Off-system approval for certain allowances (see the *Allowance Guide* document for more details) must continue to be sought from the Reward Team before they are set up in the CoreHR system.

NOTE: An Appointment must have a status of **Commenced** before Allowances may be set up.

Navigate to: Personnel > Maintenance > Personal Profile

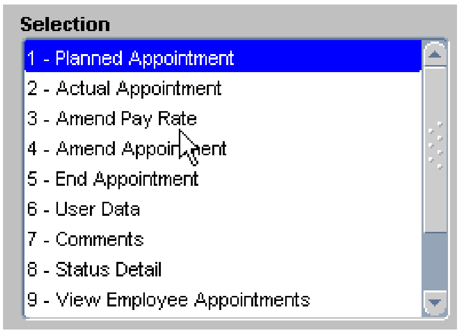
1. If already in the *Post Appointment Maintenance (PER620)* window go to step 4, if not, enter search criteria e.g. Name (**Surname** followed by first initial) or **Personnel No**, click Search and open the relevant employee record. The *Personal Profile Maintenance (HR0120)* window opens:



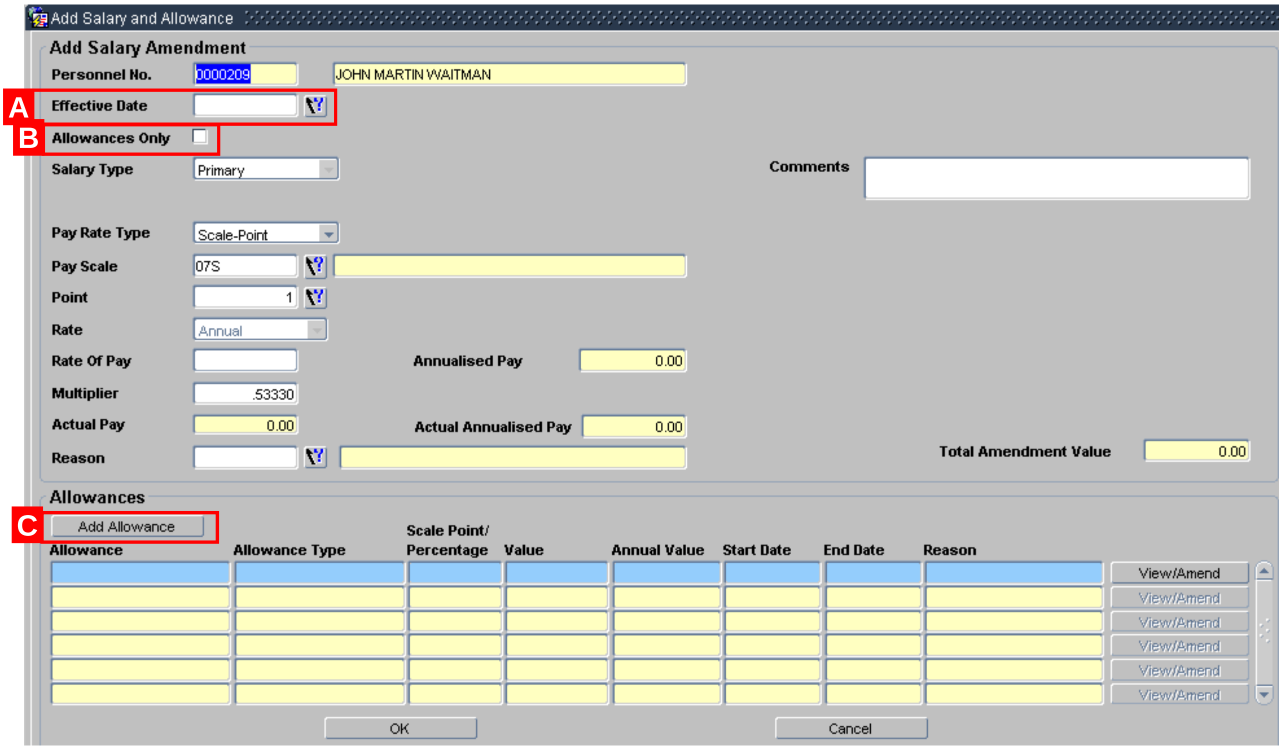
2. Go to **Select Detail** box > **Appointment Details.** The *Appointment Details (PER746)* window opens.

3. If relevant, click into the **Post Number** to ensure the correct appointment is highlighted. Click the Appointment Details button. The *Post Appointment Maintenance (PER620)* window opens.

4. Go to **Selection > Amend Pay Rate**.



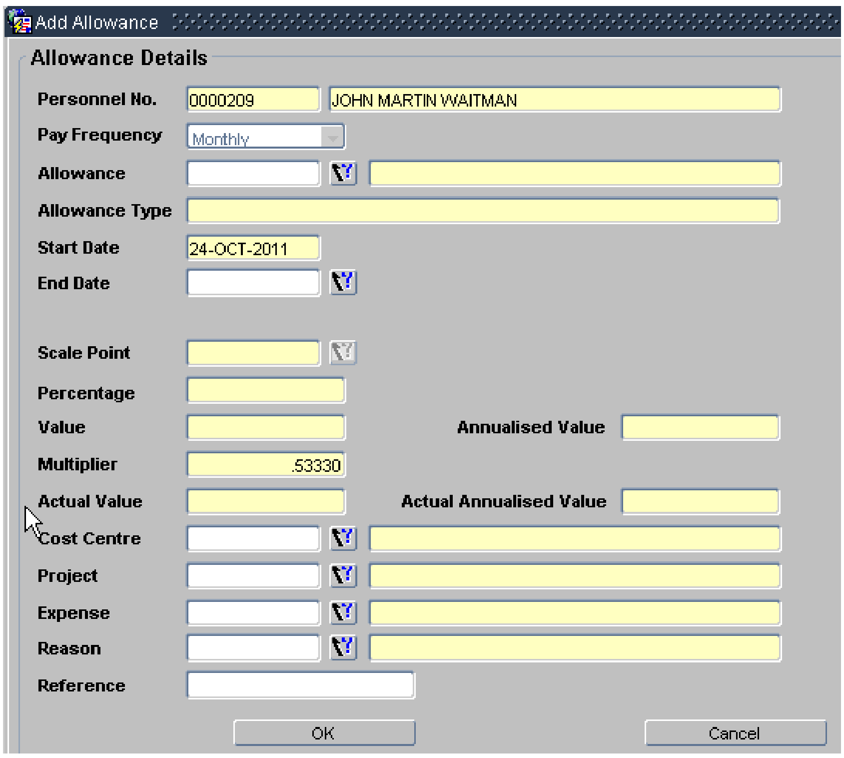
The *Add Salary and Allowance* window opens:



5. To set up a new allowance, set the **Effective Date [A]** to the date the new allowance is to be paid from.

6. Click the checkbox **Allowances Only [B]**.

7. Click the Add Allowance button **[C]**. The *Add Allowance* window opens:



8. Complete the *Allowance Details* screen as below.

For fields marked ■ below - depending on the allowance selected either Scale Point, Percentage or Value will be used. See the *Allowance Guide* for more information.

Field Name (* mandatory)	**Description**
Allowance *	Select the relevant value from the list, e.g. Standby and call out pay cash.
Start Date *	Check the start date was entered correctly - effective date entered earlier.
End Date *	Enter the end date if required. **Note**: if the end date is left blank, payment will be paid continually.
Scale Point ■	If relevant, select Scale point, this will relate to a rate table.
Percentage ■	If relevant, enter % to be applied.
Value ■	If relevant, enter the value of the allowance, e.g., 200 for a £200 per month allowance. Press tab - the system will automatically calculate the annualised value. **Note:** Most allowances are paid in full, i.e. the amount entered will not be prorated to take account of FTE, ensure value entered takes account of FTE and salary multiplier.
Cost Centre *	Select the relevant cost centre. **Note:** Cost centre needs to be specified here ONLY if the funding for the allowance is from a different cost centre to the funding for this appointment.
Project *	Select the relevant Project code. **Note:** Project code needs to be specified here ONLY if the funding for the allowance is from a different project code to the funding for this appointment.
Expense	Leave blank - this field is not used by the University.
Reason *	Select the relevant reason code, e.g. Allowance Awarded.
Reference *	Enter Reward Team authorisation reference if relevant. For scale allowances enter % of allowance, e.g. 50%. NOTE: this field is restricted to 12 letters including spaces.

9. Click OK. The *Add Allowances* window closes. Multiple allowances can be added at this time if required.

10. Click OK. The system will ask if you are sure you want to add this salary amendment. Click Yes.

11. The *Maintain HR Salary Amendments* window opens. If you have Salary Approval access and it is appropriate to do so you can approve the salary and/or allowance change straight away.

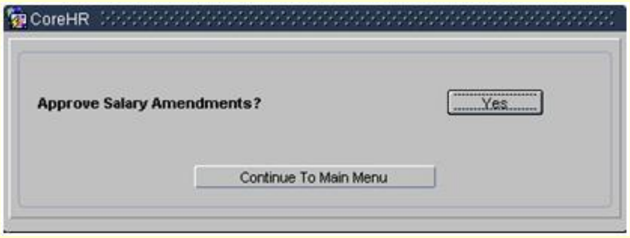
12. Exit all windows back to the Personnel main screen.

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

F. Approve (or Reject) Salary / Allowances

All salary and allowance additions and changes must be approved within your department before they are actioned by payroll.

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 **Yes**. This will take you directly to the *Maintain Approvals* window (see **3** below).

Alternatively, navigate as below.

Navigate to: Personnel > Maintenance > Salary Administration > Maintain Salary Approvals

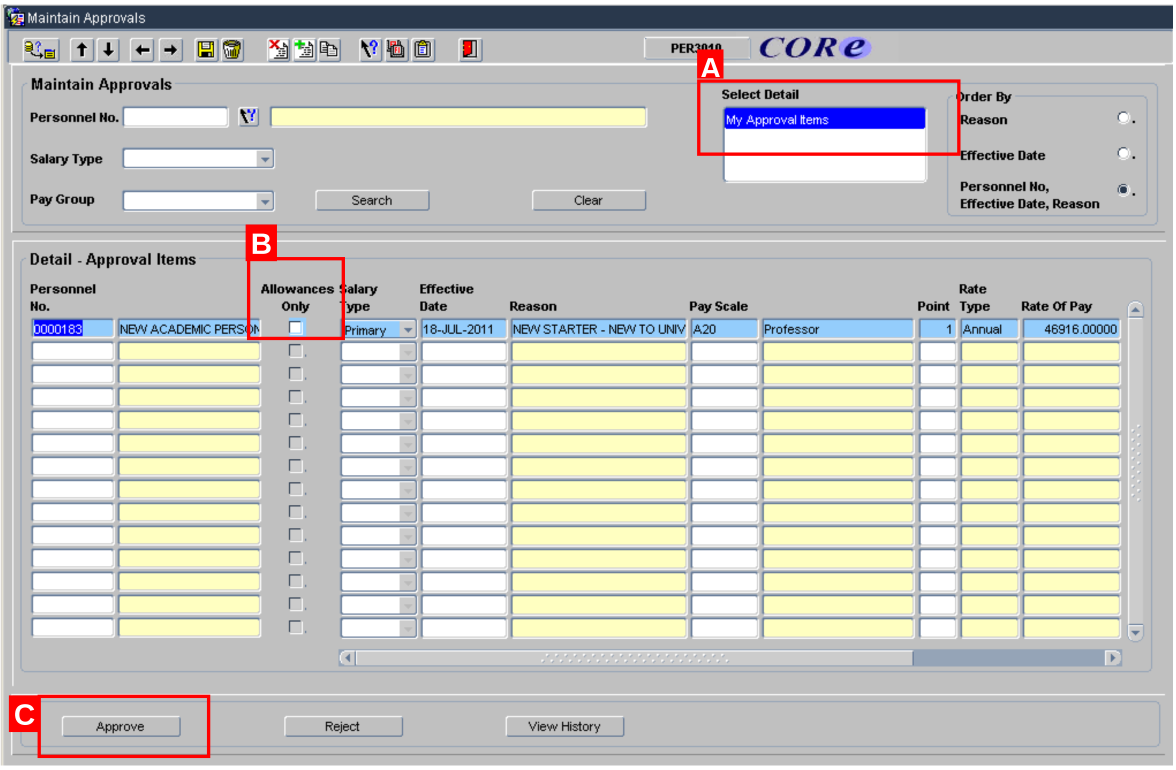
Maintain Approvals (PER3010) window.

1. The Maintain Approvals window defaults to **My Approval Items** **[A]**.

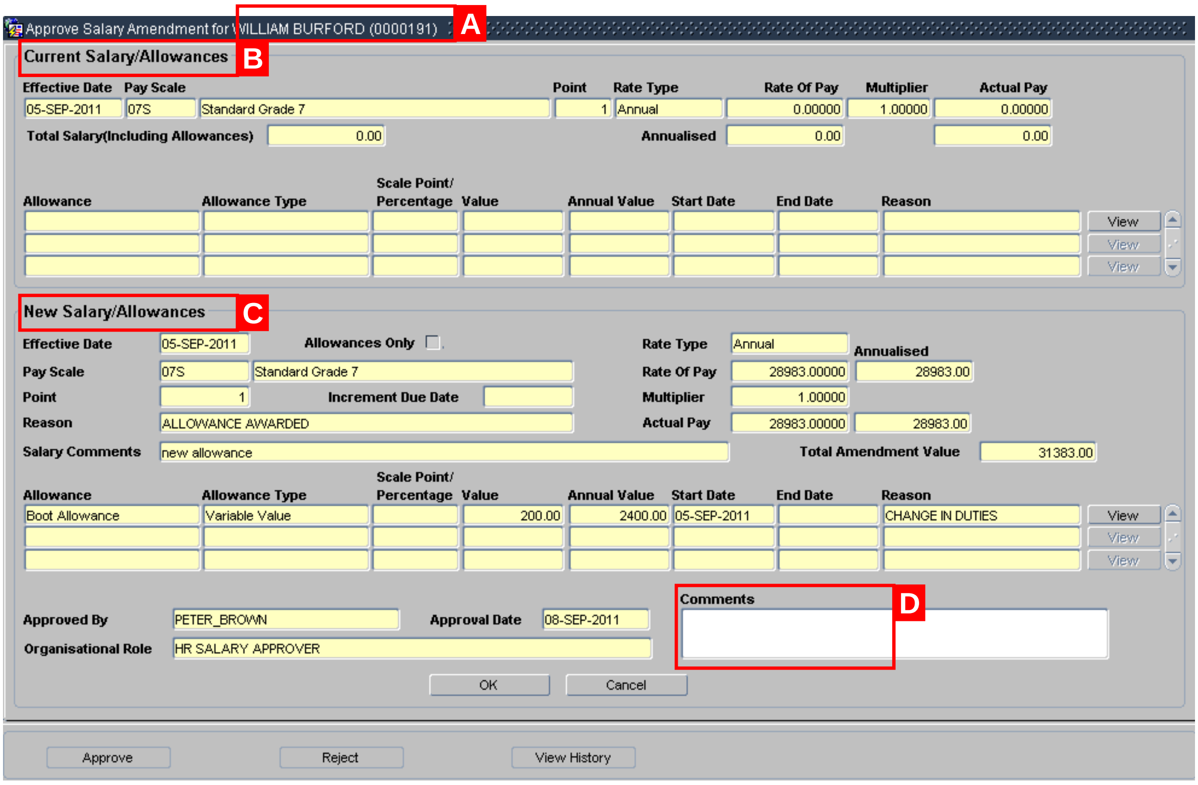
2. The list of items awaiting approval includes:

- Salary Approvals and Allowances (if set up at the same time)
- Allowances only (denoted by the tickbox **Allowances Only** **[B]**)

3. Select the relevant employee entry and click the  button **[C]** (or reject).



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].**

4. Check the **New Salary/Allowances data** is correct:

Field Name (* mandatory)	**Description**
Effective date *	Date new rate of pay expected to start from.
Pay scale *	Grade.
Point *	Point on grade.
Rate of Pay *	FTE salary associated with the grade and point.
Multiplier *	Value used to calculate the actual salary to be paid. Normally relates to FTE, but may be adjusted to allow for half-pay or no-pay situations.
Actual Pay *	Actual salary once multiplier has been taken into account.
Reason *	Reason for the change in salary.
Salary comments *	Note for salary approver.

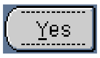
Field Name (* mandatory)	**Description**
Allowance *	Name of allowance.
Allowance type *	Variable value, Scaled or Variable Percentage as appropriate for the specific allowance.
Scale point/percentage *	Either scale or percentage depending on the allowances type.
Value *	Generally £s, but could be days or hours.
Annual Value *	Value multiplied up to annual equivalent, assuming it is continued for that long.
Start date *	Start date for the allowance.
End date *	End date for the allowance.
Reason *	Reason for the change in allowances.

5. If required, click the 

button to see more details of the costings related to an allowance.

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

7. 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.

Note: If you have rejected a change request 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.

8. Exit all windows back to the Personnel main screen.

NEXT STEPS:
Approved salary/allowances are passed to the Payroll team, via a report, for actioning.

G. Set Probation Dates

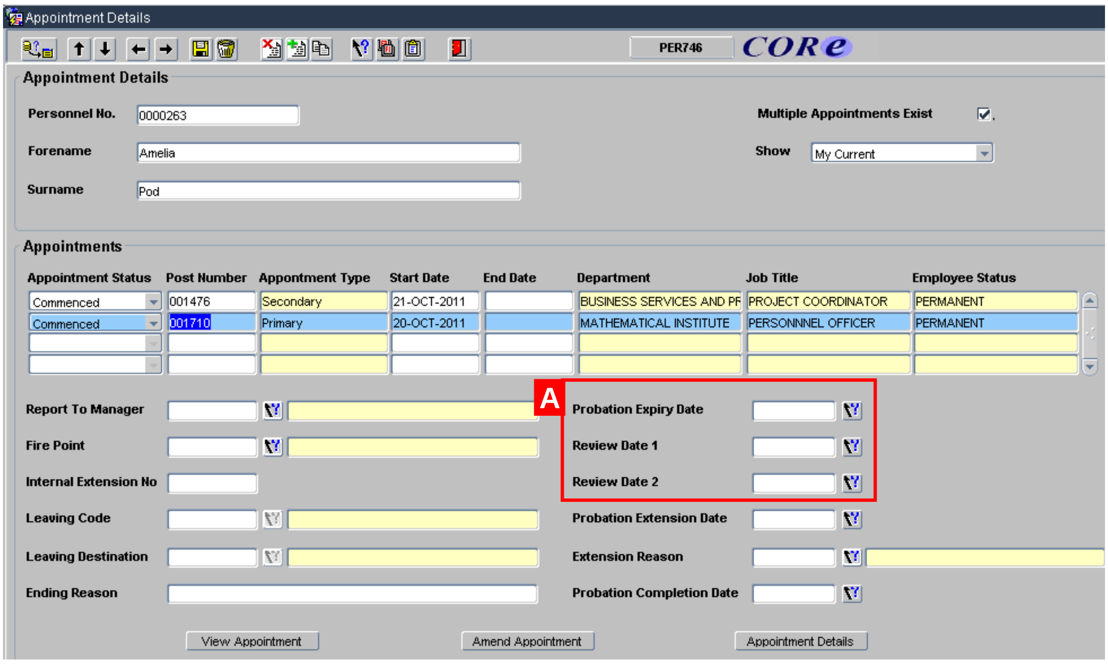
For non-academic appointments, probation dates should be entered as part of the new starter set-up. It is possible to report against these dates for prompting and planning purposes. See the ***QRG: Initial Periods of Office (IP3)*** for academic appointments.

Navigate to: Personnel > Maintenance > Personal Profile

1. 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 (HR0120)* window opens.

2. Go to **Select Detail** box > **Appointment Details.** The *Appointment Details* window opens:

3. If relevant, click into the **Post Number** to ensure the correct appointment is highlighted. Click the Appointment Details button. The *Post Appointment Maintenance (PER620)* window opens.



4. Enter the appropriate **Probation Expiry Date** and **Review Dates [A]**:

Field Name (* mandatory)	**Description**
Probation Expiry Date	Date probation is due to end, eg. 6 months after start date.
Review Date 1/2	Enter the date(s) of mid-probation review(s) as required.

5. Click [save icon]. Exit all windows back to the Personnel main screen.

NEXT STEPS :

For **direct appoints only** you should offer your new starter a *Diversity & Equal Opportunities Staff Starter Survey Form*. You should impress on them the importance of providing this information.

You should also provide your new starter with a Pension Form. In the first few weeks the new starter will probably undergo some induction training. Refer to ***QRG: Induction (IP1)*** for guidance.