

RQ1 – Creating and approving a staff request

When requesting a new post (which is not identical to any existing posts within your department) you will need to create and complete a **new** staff request.

Where you need to request any of the following you should raise a staff request based on an **existing** post:

- Refill of an existing post (**not** Casual or Paid as Claimed)
- Regrade
- New appointment (e.g. for a contract extension, or other change where a new contract is required)

What's changed?

Guidance added on copying staff requests and entering advertising details following implementation of the minor release

Nov 17

Refer to the [Staff Request and Contract Decision Matrix](#) if you are unsure or for further details.

The request will need to be approved either within your department (or by your division) depending on local divisional recruitment controls, prior to grading (where applicable) by the Reward Team.



Refer to local divisional guidance to determine if the post requires divisional approval and if the approval should be on or off-system.



Note: If the employee will be working abroad please also refer to **QRG: PA5_Working abroad**

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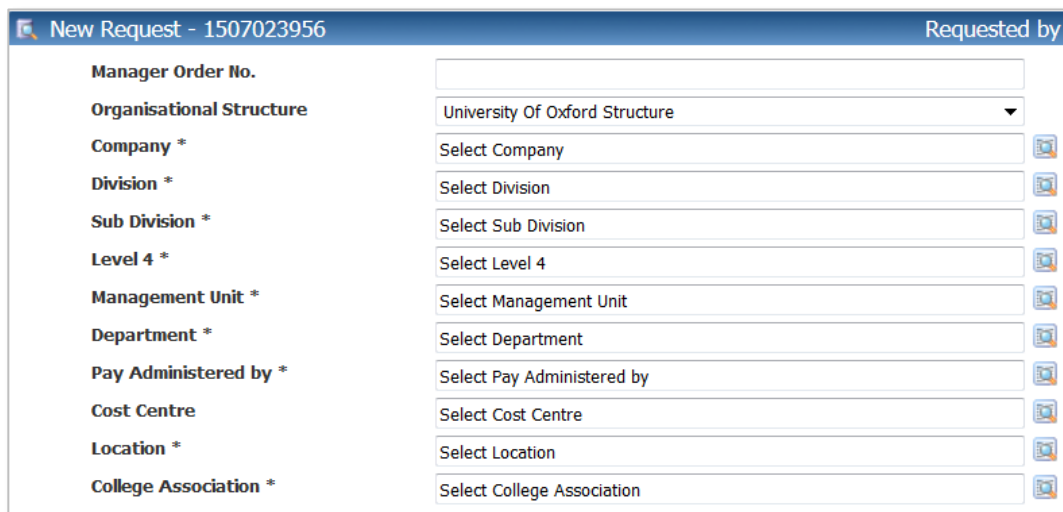
A. Raising a staff request for a brand new post

CorePortal > Dashboards > Staff Request Dashboard > Launch Staff Requests

1. Click **Request New Post**.



Note: For 'flatter' areas of the University's organisation structure there will be some repeat entry through sub division to department levels in the structure.



Field Name (* mandatory)	Guidance
Manager Order No.	This field is not currently in use.
Organisational Structure *	Defaults to Oxford Structure and must not be changed.
Company *	Select 'University of Oxford'.
Division *	Select the relevant Division.
Sub Division *	Select the relevant option (may be the same as Division).
Level 4 *	Select the relevant option.
Management Unit *	Select the relevant option.

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Department *	Select the relevant Department.
Pay Administered by *	Generally select the relevant Department, unless the request is for an academic or other post that is to be approved and administered by the Division.
Cost Centre *	Select the default GL coding for the department/division selected in the department field above. Format will be AA000000000000 where AA is the 2 digit department code. The coding string includes Activity followed by Source of Funds with no punctuation separators.
Location *	Select the relevant option. This should be the normal work location for the post and the default delivery address for payslips.
College Association	Select the relevant College, 'Default /Not Applicable' or 'Not Yet Known'.

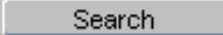
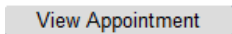
Now go to section C 

B. Raising a staff request based on an existing post

Searching for existing Post Number/Job Title

Before creating the request you will need to know the **Post Number** or **Job Title** that you wish to base the request on by looking at the record of the previous/current person in the post (you can also search by Job Title).

Navigate to: Personnel > Maintenance > Personal Profile

1. Enter search criteria e.g. **Personnel No** or **Name**. Remember to select the **All** radio button when searching for a previous employee. Click  and open the relevant employee record. The *Personal Profile Maintenance* window opens.
2. Go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.
3. Click on . The *view appointment details* screen opens.
4. Make a note of the post number.

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Post No./Sequence	229000	2	ADMINISTRATIVE SUPPORT
Post Profile Type	1A		Permanent
Post Effective Date	03-AUG-2015	Target End Date	
Planned End Date		Status	Commenced

5. Additionally, if the post is currently vacant then it is important to check if it is still active:

Navigate to: Maintenance>Post Management>View Post Appointments

- 5.1. Enter the **Post Number** and change **Status** to **All**.


Structure	University of Oxford Structure	Status	Planned	View Post Profile
Company		Post Number		View Post Appointm...
Division				Search
Sub Division				Clear
Level 4				

- 5.2. Click .

- 5.3. Select the button (top right) to open the Post screen.

- 5.4. Check the **Post Status**. If it is *Dormant* then you should email the Reward team (reward@admin.ox.ac.uk) and ask for it to be re-activated.

Post Title	ADM	ADMINISTRATIVE SUPPORT
Post Number	228736	Post Status ACTIVE
Effective Date	01-JUL-2015	
Post Profile Type	1A	PERMANENT
Managers Order		
Structure Code	1	OXFORD STRUCTURE

 **Note:** You must wait for confirmation from the Reward team that the post has been reactivated before proceeding to the next step.

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Create the staff request

CorePortal > Dashboards > Staff Request Dashboard > Launch Staff Requests

1. Click **Search Existing Posts**.



2. Enter the relevant post number into the **Post Number** field and click **Search**. Alternatively you can search for the post by title. Click on the LoV button in the **Post Title** field.

Search for existing Post

Company: Select Company

Division: Select Division

Sub Division: Select Sub Division

Level 4: Select Level 4

Management Unit: Select Management Unit

Department: Select Department

Pay Administered by: Select Pay Administered by

Cost Centre: Select Cost Centre

Location: Select Location

College Association: Select College Association

Post Number: 228736

Post Title: Select Post Title

Search Select Post Title

Search Results

Your search returned 1 results

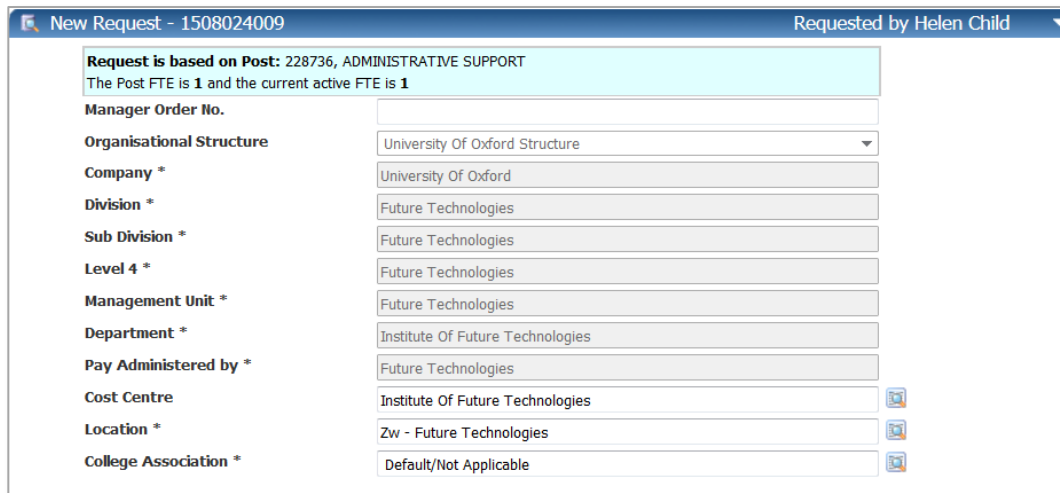
#	Post Number	Post Title	Post Type	Department	Cost Centre	Pay Scale	Post Active FTE	Employee Name	Appointment Status
1	228736	ADMINISTRATIVE SUPPORT	PERMANENT	INSTITUTE OF FUTURE TECHNOLOGIES	INSTITUTE OF FUTURE TECHNOLOGIES	Standard Grade 4	1	1 JANE TEST	Appointed




NOTE: When the results have been returned you can view the details of the post(s) including the name of the employee currently appointed to that post.

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3. A new staff request window will open with fields pre-populated. Check that the correct post is shown in the blue box at the top of the screen.




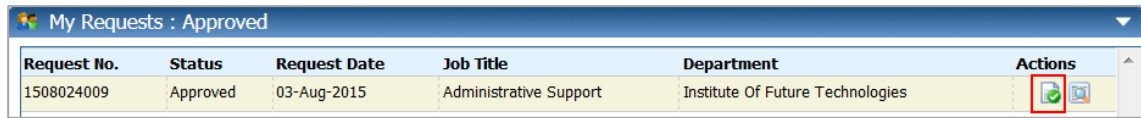
4. Complete the remaining staff request fields as appropriate:



Field Name (* mandatory)	Guidance
Manager Order No.	This field is not currently in use.
Organisational Structure through to Department	Data populated from existing post, cannot be changed.
Pay Administered by * 	Data populated from existing post, cannot be changed unless the field is empty, in which case select Department or Division as appropriate for the post. If the details in this field are incorrect you will need to create a Staff Request for a New Post. Quote the existing post number within the Additional Information field and explain that the original post had incorrect details within the Pay Administered By field.
Cost Centre *	Data populated from existing post. Check and change if required. Should be the default GL coding for the department/division selected in the department field above. Format will be AA0000000000 where AA is the 2 digit department code.
Location *	Data populated from existing post. Check and change if required. This should be the normal work location for the post and the default delivery address for payslips.
College Association	Data populated from existing post. Check and change if required.

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Copying staff requests

You can copy staff requests which have already been created by clicking on  in the actions column:



Request No.	Status	Request Date	Job Title	Department	Actions
1508024009	Approved	03-Aug-2015	Administrative Support	Institute Of Future Technologies	 

Note:



- You can only copy staff requests that you have created yourself.
- Only copy a staff request that was created using 'Create New Post' (refer to [Staff Request and Contract Decision Matrix](#))
- You can copy a staff request at any stage, e.g. Planned, Submitted, Rejected etc.




Continue to section C below:

C. Completing the remainder of the staff request


Vacancy and post details

Vacancy Type	Select Vacancy Type
Position Type	Select Position Type
Vacancy Reason	
Replace Employee	Select an Employee
Job Title *	Select Job Title
Job Description	
Category *	Select Category
Sub Category *	Select Sub Category
Pay Scale *	Select Pay Scale
Budgeted	<input type="checkbox"/>







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Field Name (* mandatory)	Guidance
Vacancy Type * 	Select the relevant Vacancy Type: - Academic - Professional and Management - Research - Support and Technical Note: This is used to allocate where the advert for this vacancy will appear on the University's jobs and vacancies web pages.
Position Type *	This field is used to classify the staff request, and advise the Reward Team of the nature of the request. Select one of the options below: - Existing post – new contract - Existing post - contract amendment - New post - correction - New post – duplicate - New post - Generic JD - New post - Generic JD (amended) - New post - New JD - Regrading - Replacement/refill If you are not sure which position type to choose please refer to the Staff Request and Contract Decision Matrix .
Vacancy Reason	This field is not in use.
Replacing Employee	This field is not in use.
Job Title * 	Select the relevant job title, or closest match. Note: The existing job title may have been created by the migration process and may not be very accurate, select a more appropriate generic title if appropriate.
Job Description *	Enter the actual job title (even if the same as above) as used on the job description and advert. Note: This field must be completed. If the actual title is not yet known please enter the Job title in this field.
Category * 	Teaching only - where Sub Category below is AT. Research only - where the contract indicates research <u>only</u> or where the <u>primary</u> activity is research and teaching responsibilities make up less than 16% of contracted time. Teaching and research - where research and teaching responsibilities exist, <u>and</u> the teaching element is more than 16% of contracted time. Not teaching and/or research – example roles: Vice-Chancellor, Pro-Vice-Chancellor, Proctor. Not an 'academic' contract – individuals who do not fall into the categories above <u>and</u> who have one of the following Sub Category codes: DA, DP, FP, HP, IP, LP, MP, IT, TS, DO, RM, MG

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	<p>Not applicable/not required - individuals who do not fall into the categories above <u>and</u> who have one of the following Sub Category codes: DC, DS, FA, LA, MA, MI, SB, SC, SE, SG, SH, SK, SL, SM, SO, SP, SR, SS</p> <p>Note: This field is used for statutory reporting and is especially important for HESA and REF exercises. Full guidance notes can be found on the Personnel Services website within the HR Information Team pages.</p>
<p>Sub Category *</p> 	<p>Data populated from existing post, change if required. It is important that the correct staff classification is selected. Full guidance notes can be found on the Personnel Services website within the HR Information Team pages. This field must be completed to prevent failure of interfaces to other systems.</p>
<p>Pay Scale *</p>	<p>Select proposed scale (pending confirmation from the Reward Team) for regrades or replacement/refill at new grade. Otherwise this should be as existing post.</p>
<p>Budgeted</p>	<p>Select the checkbox if the Post is budgeted.</p>

Planned appointment details


Request Date *	<input type="text"/> 
Planned Start Date *	<input type="text"/> 
Planned End Date	<input type="text"/> 
Contract Duration	<input type="text"/>
Employee Status	Select Employee Status 
Sub Status	Select Sub Status 
Reporting To	Select Reporting To 
Hours	<input type="text"/>
Weeks	<input type="text"/>
FTE	<input type="text"/>
Positions Required	<input type="text"/>
Additional Info	<p>Please confirm details of staff member being replaced OR for whom a contract extension is being sought.</p>


Field Name (* mandatory)	Guidance
Request Date *	Enter today's date.

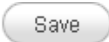
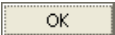
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Planned Start Date * 	<p>Always enter today's date or an earlier specific date if applicable eg Regrading. Do not enter a future date as this could delay the automatic email notifications. Note: You will still be able to appoint from any date after the planned start date.</p>
Planned End Date *	<p>Enter the planned end date if applicable (e.g. if Fixed term).</p>
Contract Duration *	<p>Enter the contract duration if fixed term.</p>
Employee Status Existing post* 	<p>This will be populated from the existing post. Amend as appropriate for this particular appointment. If a permanent change in Post Type (contract terms) is required, then a new post will need to be created. Please restart your request and follow QRG RQ1a to Create Staff Request (new post).</p>
Employee Status New post*	<p>Select the relevant employee status:</p> <ul style="list-style-type: none"> - Permanent - Open Ended Externally Funded - Fixed term - Self-Financing <p>Note: The <i>Open Ended Externally Funded</i> option can only be given to Academic-Related staff.</p>
Sub Status *	<p>Select the relevant sub status e.g. Full Time, Part Time, Term Time, Variable Hours.</p>
Reporting To	<p>This field is not in use.</p>
Hours *	<p>Enter the relevant weekly hours, e.g. 37.5 or 0 for variable hours posts</p>
Weeks (term-time employees only)	<p>Enter the number of weeks the employee works per year inclusive of holiday entitlement. E.g. if the employee works 38 weeks per year and is entitled to 4 weeks holiday, enter 42 weeks. NB: only applicable to term time employees who are paid the same amount each month.</p>
FTE * 	<p>Enter the FTE, e.g. 1 for full time, 0.5 for half-time or 0 for variable hours posts. If you require a new appointment to be created with an FTE that exceeds that of the post to which it is attached, you should indicate this in the "Additional Information" field below.</p> <p>Note: The existing FTE may have been created by the migration process and therefore could be lower than the approved head count for this post - update as appropriate.'</p>

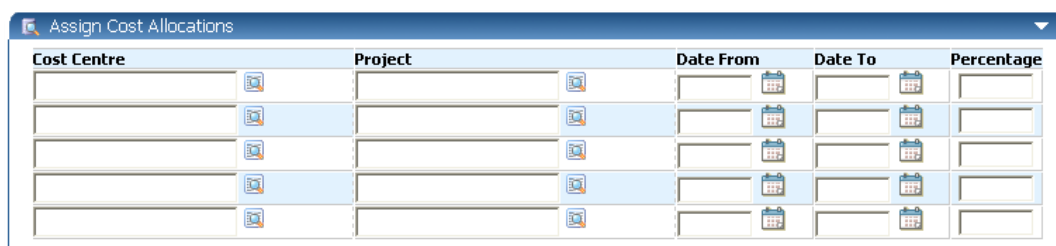
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Positions Required *	Enter the number of positions required. Generally 1, but can be more if all identical and to be advertised in one vacancy.
Additional Information	Enter any additional information as required, e.g. reason for the vacancy; name of employee; line manager etc depending on the type of staff request. If the job description attached to the staff request is a generic please quote its code (e.g. GEN-01) and indicate if the generic duties have been altered. Where off-system divisional approval was required (and obtained) the protocol number should be noted here. If multiple posts are required this should be reiterated here. If you require a new appointment to be created with an FTE that exceeds that of the post to which it is attached, you should indicate this here.  Note: This field is restricted to 2000 characters. If you need to send more information please attach as a word or text file.

 Check you have completed all mandatory fields highlighted by * above.

1. Click . The system will confirm the request has been saved. Click . The screen will refresh and additional sections will appear at the end of the request.

Funding and documents




Cost Centre	Project	Date From	Date To	Percentage

2. **Assign Cost Allocations:** Specific cost allocations where known should be selected or the defaults entered. Multiple lines should be completed for posts which will have split funding allocations. The total must add up to 100%.

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Field Name	Guidance
Cost Centre	Select the relevant GL code. Format will be AA999999999 where AA is the 2 digit department code. The coding string includes Activity followed by Source of Funds with no punctuation separators. OR Select or enter 'CCPROJ' if it is going to be funded by a project or grant. Refer to Recording Cost Allocations in CoreHR .
Project	Either leave blank if a GL cost centre has been selected. OR Select the relevant Project Code (Task/Sub Task). Format will be AAXXXXXX.XXXX.00 where AAXXXXXX is the Project Code and XXXX.00 is the Project Task and Sub Task. Take care to check the correct code has been selected.
Expense	This field is not in use
Date From	Enter start date of costing (should be the same as the planned start date).
Date To	Enter the planned end date if applicable.
Percentage	Enter 100% unless the post is going to be split over several cost centres.

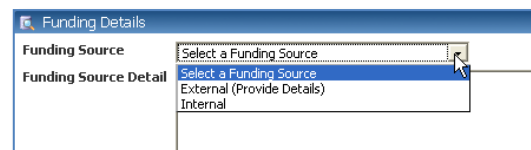
- 3. Staff Request Documents:** Attach Job Description, Business Case, Organisation Chart, etc., as applicable to the post/ type of request. Click on the  to browse and locate existing documents. Upload each document individually. Click





NOTE: Always ensure that you are using the current version of the job description and other templates. The latest versions can be found on the Personnel Services website under 'Templates and Forms'.

- 4. Funding Details:** Select the **Funding Source** (external or internal funding). Enter the **Funding Source Detail** (for externally funded posts).



- 5. Advertising Details:** Select the advertiser(s) from the LoV as applicable. If desired enter/select the funding details i.e. where the advertising is to be paid from. **NB:** only the Advertiser details will appear on the advertising screen of the vacancy.

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6. **Assign Approver:** Select the appropriate **Approver** for this request from the list. **Note:** Divisional and Department Approvers are in the same list. Click

7. Check your work and make any edits. Click , when you are ready to submit the request for approval.



NOTE: You cannot edit a Staff Request after you submitted it, unless it is subsequently 'rejected with edit' by your approver.

8. Close Staff Request window. **Exit** from CorePortal (Logout).



Note: If the appointment is jointly with another higher education institution (HEI) please contact PRAS to notify them of this.



NOTE: Staff requests based on existing posts can take up to 2-3 working days to be processed by the reward team and 10 working days for staff requests based on a new post.

NEXT STEPS:

If you are the Department Approver continue to section D. Otherwise, await email confirmation that the post has been setup.

You can check the status of the request at: **CorePortal > Dashboards > Staff Request Dashboard > Launch Staff Requests.**

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D. Approving or rejecting a staff request

In order for a staff request to be submitted to the Reward Team for creation of a post, appointment and vacancy, the request must be approved by a departmental or divisional approver (depending on local divisional recruitment controls). If a staff request cannot be approved then the Approver must reject it. Depending on the reason for the rejection the request can be:

- **Rejected with edit** – in which case the requestor will be able to update the staff request and resubmit once the rejection comments have been reviewed and acted upon. E.g. where further detail needs to be added to the business case.



Note: It is not possible for Approvers to edit a staff request directly and then approve it. Edits must be made by the requestor and resubmitted for approval.

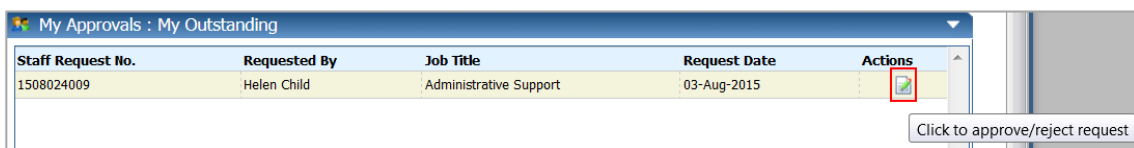
- **Rejected** - the request and rejection comments can be viewed by the requestor, but the request cannot be updated or resubmitted. E.g. where funds are not available as hoped.

CorePortal > Dashboards > Staff Request Dashboard > Launch Staff Requests

1. All staff requests awaiting approval will be displayed in the **My Approvals** section.
2. Click **My Outstanding**. All staff requests awaiting your approval will be displayed in the main screen area.




3. Click the icon under 'Actions' to approve or reject the request.



4. Check the details of the request carefully. To view attached documents, click the icon to the right of the attachment.

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Approving a Request


1. To approve the staff request click the  button. The Approve Request screen will open:



2. Enter **Comments** e.g. Approved for internal advertising by xxx approving body on x date. Protocol number xxxxx.

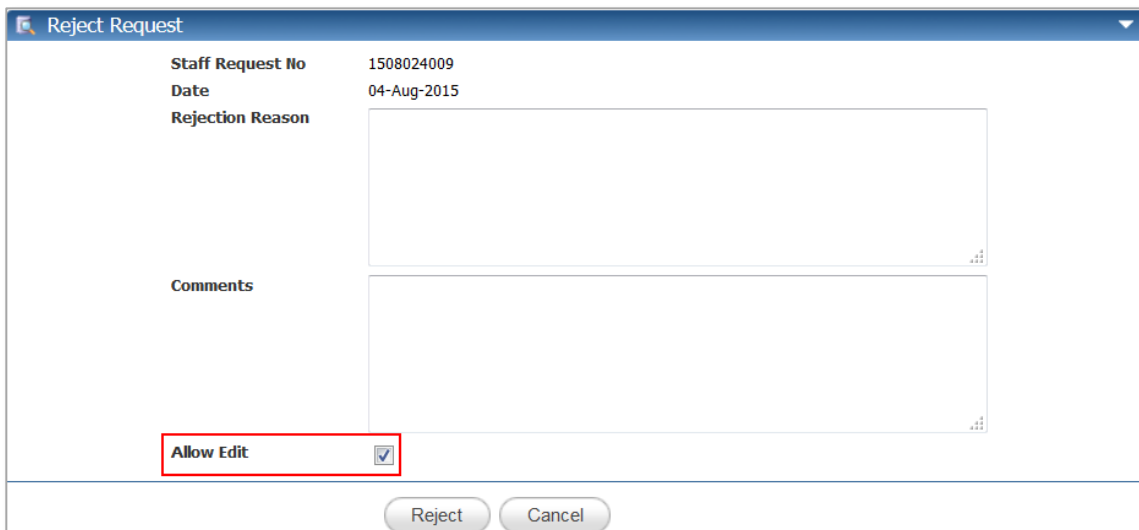


Note: The comments you add will be viewable by anyone who has security access to view the staff requests for your department or division.

3. Click the  button.
4. Close Staff Request window. Exit all windows back to the Personnel main screen.

Rejecting a Request

1. To reject the request click the  button. The *Reject Request* screen will open:



2. Enter **Rejection Reason** e.g. insufficient funds, or further detail needed in business case.

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3. Enter **Comments** e.g. Request rejected by xxx approving body on x date.



Note: As above, the comments you add will be viewable by anyone who has security access to view the staff requests for your department or division.

4. If you do not wish the staff request to be available to edit and resubmit, untick the **Allow Edit** tick box.

5. Click the  button.

6. Close Staff Request window. Exit all windows back to the Personnel main screen.



NOTE: Staff requests based on existing posts can take up to 2-3 working days to be processed by the reward team and 10 working days for staff requests based on a new post.

NEXT STEPS:

Approved staff requests are automatically passed to the Reward Team within CoreHR. The requestor will be notified when the new post/appointment has been set up.

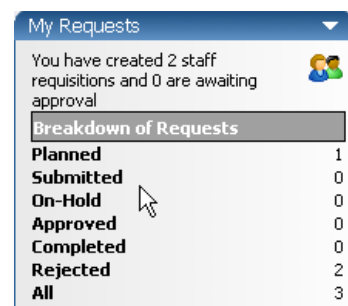
E. Editing an existing staff request

When necessary, it is possible to maintain (amend) or delete a staff request, eg to:

- Complete a previously saved, but not submitted request
- Abandon a previously saved, but not submitted request
- Update a previously submitted and rejected request where it was rejected 'with edits'

CorePortal > Dashboards > Staff Request Dashboard > Launch Staff Requests

1. In **My Requests** area, click on the relevant status to list requests with that status e.g. Planned, Rejected, etc.
2. A list of staff requests with that status will be displayed in the main body of the window.



Breakdown of Requests	
Planned	1
Submitted	0
On-Hold	0
Approved	0
Completed	0
Rejected	2
All	3




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Completing a previously saved but not submitted staff request

1. Locate the staff request in the **Planned** list.



Request No.	Status	Request Date	Job Title	Department	Actions
1107000412	Planned	15-Jul-2011	Administrator	Mathematical Institute	 

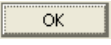
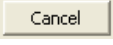
2. Click the  icon to the right of the relevant staff request. The staff request details are displayed.
3. Check/update/complete details as required. Click  .
4. When ready to submit, click  to complete the process.
5. Close Staff Request window. Exit all windows back to the Personnel main screen.

Abandoning a previously saved but not submitted staff request

1. Locate the staff request in the **Planned** list.



Request No.	Status	Request Date	Job Title	Department	Actions
1107000412	Planned	15-Jul-2011	Administrator	Mathematical Institute	 

2. Select the **X** to the right of the staff request. An 'Are you sure you want to Delete this request?' message is displayed.
3. Click  to delete the request or  .
4. Close Staff Request window. Exit all windows back to the Personnel main screen.


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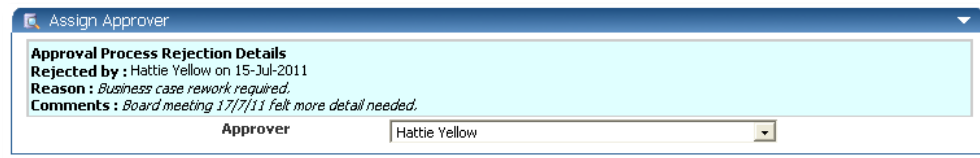
Updating a previously submitted and rejected Staff Request

1. Locate the staff request in the **Rejected** list.




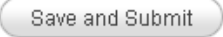
Request No.	Status	Request Date	Job Title	Department	Actions
1107000411	Rejected	15-Jul-2011	Administrator	Mathematical Institute	 
1107000409	Rejected	14-Jul-2011	Facilities Assistant	Mathematical Institute	 

2. Click the  icon to the right of the relevant staff request. The staff request details are displayed.
3. Scroll to the bottom of the page to review the rejection reason and comments.



Approval Process Rejection Details
Rejected by : Hattie Yellow on 15-Jul-2011
Reason : *Business case rework required.*
Comments : *Board meeting 17/7/11 felt more detail needed.*

Approver

4. Check/update/complete details as required. Click  .
5. If ready to submit then click  .
6. Close Staff Request window. Exit all windows back to the Personnel main screen.



Note: An email notification will not be sent to approvers for re-submitted staff requests. Please contact your approver off system to inform them the request is ready to be approved.

NEXT STEPS: For requests which have now been submitted (or resubmitted), if you are the Department Approver refer to **Section D** of this guide. Otherwise, await confirmation from the Reward Team that the post has been setup.

You can check the status of the request at: **CorePortal > Dashboards > Staff Request Dashboard > Launch Staff Requests**