Set up a Non-Employee (including Agency Workers)

This guide shows how to set up the record for a non-employee such as a contractor, visiting academic, agency worker, etc. Departments can generally choose whether or not a non-employee needs a record to be set-up, **with the exception of agency workers who, to comply with new employment law, must be set-up in CoreHR as non-employees**.

This set up can be done on the day the individual arrives. Unlike appointing an employee, it does not have to be done in advance.

Note: Before setting up an **agency worker** it is important to check with the agency that they have not recently carried out a similar role elsewhere in the University. If they have, this may need to be taken account of when calculating 12 weeks service. Refer to Personnel Services for guidance.

Navigate to: Personnel > Maintenance > Personal Profile

Employee Search window (PER021S)

1. Click the [New Appointments] button. The *Applicants/Posts window* opens.

2. Select the **Posts** tab.

3. Locate the relevant *bucket post* in the **Post** list.

For agency workers select **AGENCY**. For all other non-employees select **NONEMP**.

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.

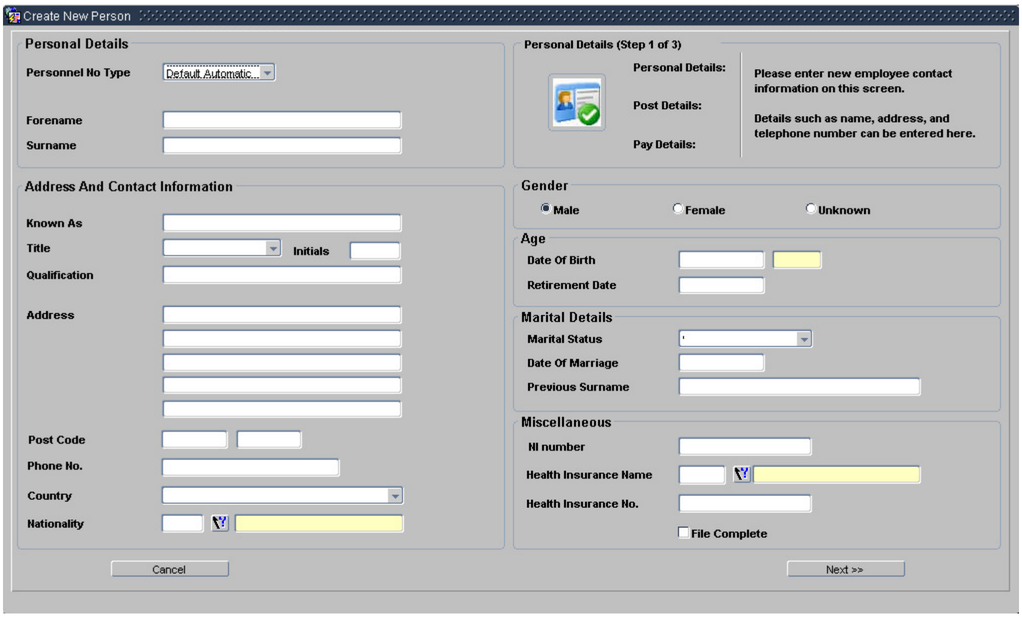
Enter the individuals **name, NI number** or **Date of Birth** to search on. Click [Search].

6. An individual new to the University SHOULD NOT exist in the database. The search results list will remain blank.

Note: If the individual is found they should be appointed as Rehire. Refer to ***QRG: Appoint Rehire (PA2d)***.

If you expected to find the individual but were unable to locate them as expected please contact HRIS support as their record may have restricted access.

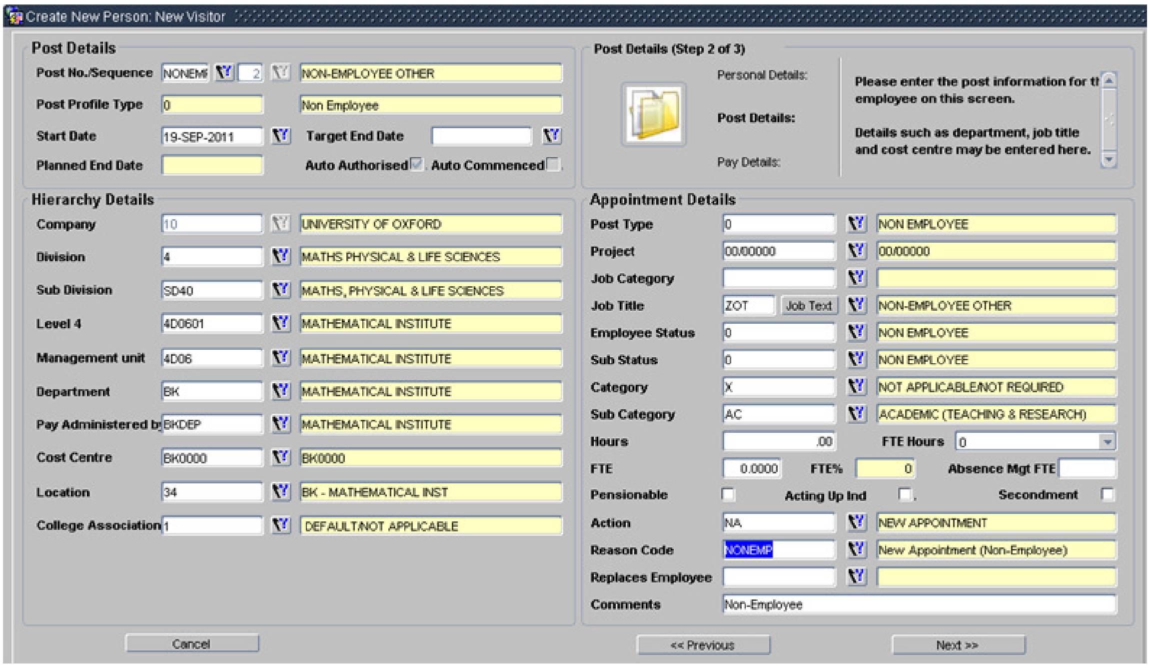
7. Assuming the individual does not have a previous history with the University, click [Create New Starter].The 3-step 'New Person Record Wizard' opens:



8. Complete the fields as below.

Field Name (* mandatory)	**Description**
Forename *	Enter first name and all middle names (if relevant) in full. E.g. Robert not Bob.
Surname *	Enter surname.
Known As *	Enter first name only. Can be shortened if preferred.
Title *	Select from drop-down list.
Initials *	Enter initials for forename and middle names.
Qualification	Field not in use.
Address *	Enter full address details.
Post Code *	Enter post code, using both fields.
Phone No. *	Enter details.
Country *	Select from drop-down list.
Nationality	Field not in use.
Gender *	Select as appropriate.
Date of Birth *	Must be completed for agency workers, using the format: DD-MMM-YYYY
Retirement Date	Please ignore this field. Calculated by the system, if date of birth entered, but not compliant with recent legislative changes.
Marital Status	Field not in use.
Date of Marriage	Field not in use.
Previous Surname	Field not in use.
NI Number *	Must be completed for agency workers at this stage.
Health Insurance Name/No.	Field not in use.
File Complete	Field not in use.

9. Click Next >> .

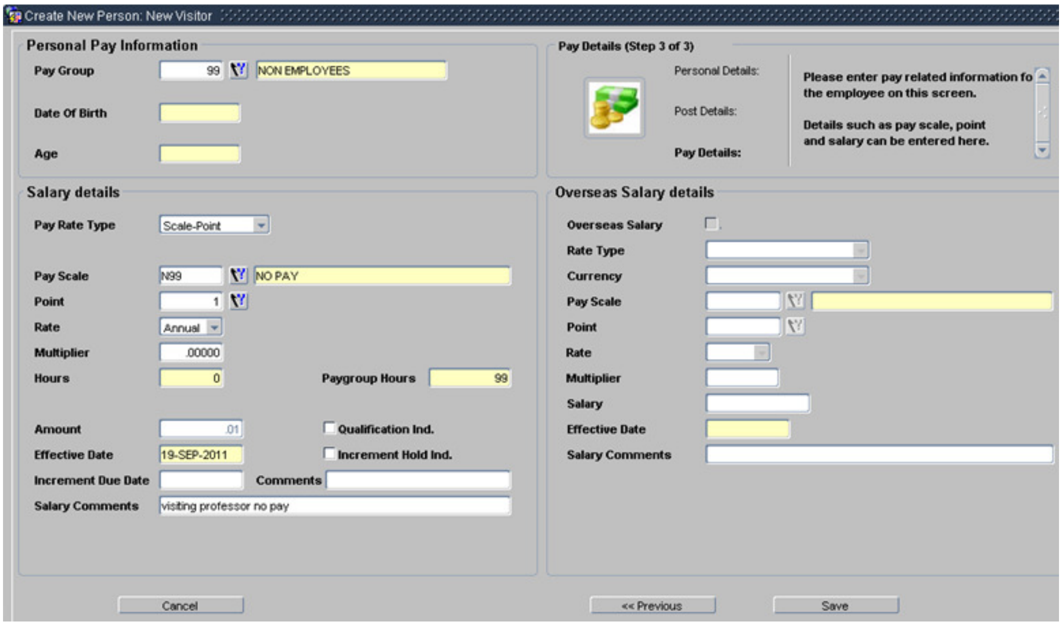


10. Complete the fields as below.

Field Name (* mandatory)	**Description**
Start Date *	Enter agreed start date.
Target End Date	Enter if applicable.
Division to Pay Administered by	Enter hierarchy details as appropriate.
Cost Centre *	This should be the departmental default.
Project *	Enter default (00/00000).
Job Category	Do not use.
Job Title *	Pre-populated with Non-Employee or Agency Worker as appropriate. Should be changed to actual job title.
Job Text	Click the button and enter the actual job title (case sensitive), if required.
Employee Status *	Select **Non-employee**.
Sub Status *	Select **Non-employee**.
Category *	Select **Not Applicable/Not Required**.
Sub Category * 	Select relevant option. **It is important that the correct staff classification is selected for agency workers.** Full guidance notes can be found on the [Personnel Services website]().
Hours *	Enter, e.g. 0.
FTE Hours *	Enter **0**.
FTE *	Enter **0**.
FTE% *	Should be 0%.

Action *	Select **New Appointment**
Reason Code *	Select **New Appointment (Non-employee)**

11. Click Next >>.



12. Complete the fields as below.

Field Name (* mandatory)	**Description**
Pay Group *	Select **99 Non Employees**.
Point *	Should be set to 1. Do not change.
Multiplier *	Should be **0** so no salary is generated.
Increment Due Date	Not required.
Salary Comments *	Enter any notes for the Salary Approver and Payroll, e.g. to confirm they are a non-employee with no pay.

13. Click Save.

You should make a note of the Personnel Number for your future reference.

14. Click OK. You are returned to the *Appointment Details window* (PER746).
15. Exit all windows back to the Personnel main screen.

NEXT STEPS:

Note: the system auto-commences the individual, so you do not need to go through the Commence process in Core.

No further actions are required for non-employees until an agency worker has been working for 12 weeks. Refer to ***QRG: Change: Agency Workers at 12 Weeks (CH19)*** for details.

Follow ***QRG: End Appointments (EA1)*** for details on closing the record of a non-employee.