RQ1 – Creating and approving a Staff Request

Introduction

A Staff Request is an online form in CoreHR which must be completed and approved by departments and divisions when a new appointment is needed in the system. This is usually because:

- a vacancy needs to be filled – either because someone has left or a new role has been created; or
- significant changes have been made to an existing employee’s contract so they need to be moved into a new appointment on the system, e.g. regrading.

How to use this guide

The Staff Request and Contract Decision Matrix will help you to identify whether a Staff Request is needed for your scenario and, if so, will instruct you on the key fields and steps to follow when completing it (see Appendix B). See also the People Profiles Matrix for guidance on different employment statuses.

When creating a Staff Request, the Staff Request and Contract Decision Matrix will confirm whether it needs to be created from a post that is already present in the system or not. CoreHR and the matrix refers to these two situations as 'Create Request From Post' (from an existing post) or 'Create New Request' (not from an existing post).

Once you know this, use the flowchart below to identify which sections of this user guide you need to follow.

What’s changed?
1. Screen prints and guidance updated to include Work Group field.
2. Top tip added to help with the approval process. Oct 19
1. Review Staff Request and Contract Decision Matrix

Refer to the Staff Request and Contract Decision Matrix (Appendix B) to confirm which change type best describes your scenario. Follow the guidance on the relevant row of the matrix to confirm whether you need to raise a Staff Request, and if so, whether you will need to create the request from an existing post.

The matrix must be referred to whilst creating your request as it instructs you what needs to be entered in certain fields, as well as which processes need to be followed according to your scenario.

2. Initiate Staff Request

Option A: Create New Request

This guidance is only applicable to scenarios on the matrix which state Create New Request (ie not from an existing post). If you are unsure, refer to how to use this guide. If your Staff Request needs to be created from a post refer to Option B below.

Part 1: Open Staff Request

CorePortal > Quick Jump > Staff Requests > Staff Requests

1. Click Create New Request.

2. The Staff Request form opens.

![Create New Request Form](attachment:Create New Request.png)
Part 2: Complete Staff Request wizard step 1: Position

1. Complete the fields as instructed below:

<table>
<thead>
<tr>
<th>Field Name (* mandatory)</th>
<th>Guidance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Structure *</td>
<td>Select ‘University of Oxford’. Once selected, remaining Position fields will appear.</td>
</tr>
<tr>
<td>Company *</td>
<td>Select ‘University of Oxford’.</td>
</tr>
<tr>
<td>Division *</td>
<td>Select the relevant Division.</td>
</tr>
<tr>
<td>Sub Division *</td>
<td>Select the relevant option (may be the same as above).</td>
</tr>
<tr>
<td>Level 4 *</td>
<td>Select the relevant option (may be the same as above).</td>
</tr>
<tr>
<td>Management Unit *</td>
<td>Select the relevant option (may be the same as above).</td>
</tr>
<tr>
<td>Department *</td>
<td>Select the relevant Department (may be the same as above).</td>
</tr>
<tr>
<td>Pay Administered by *</td>
<td>Select the Department/Division that will be approving pay changes.</td>
</tr>
</tbody>
</table>

You may need to use the scroll menu on the right-hand side, according to your screen settings, to see the remaining fields.

**Cost Centre ***

Type in the first two characters of your default GL coding to find it in the list, this will usually be the two digit department code.

Format will be AA00000000000 where AA is the 2 digit department code. The coding string includes Activity followed by Source of Funds with no punctuation separators.

**Note:** This is not where the employee’s salary will be charged to, you will have a chance to record these details later.

**Location ***

Select the relevant option. This should be the normal work location for the post and the default delivery address for payslips. Type in the two digit department code to find your location.

**Work Group ***

Select Work Group for the individual. Enter ‘Core Default Work Group’ if the relevant Work Group is not known/available. New Work Groups can be requested by completing a Service Request, accessible from the HRIS Service Catalogue page.

**College Association**

Either select the relevant College or select ‘Default /Not Applicable’ or ‘Not Yet Known’.
2. Click **Next** to continue to the next step of the Staff Request wizard. Skip to guidance in **Section 3**, complete Staff Request (wizard steps 2-8).

---

**Option B: Create Request From Post**

This guidance is only applicable to Staff Requests which need to be created from a post. If you are unsure, refer to how to use this guide. If your Staff Request does not need to be created from a post, refer to **Option A**.

**Part 1: Search for existing post number**

Before creating the request you will need to know the **Post Number** of the post upon which you want to base the request. You can find this by looking at the record of the previous/current person in the post, in the Back Office.

1. Enter search criteria e.g. **Personnel No** or **Name**. NB select the **All** radio button when searching for a previous employee. Click **Search** 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 **View Appointment**. The **view appointment details** screen opens.

4. Make a note of the **post number**.

---

**Part 2: Open Staff Request**

---
1. Click **Your Establishment**.

![Staff Requests](image)

2. Click on the [ ] icon to open the search window.

3. Enter the relevant post number into the **Post Number** field and click **search**.

![Search for existing post](image)

If your search returns 0 results, it is possible your post has been made dormant. Refer to **Appendix D** for more details.

**NOTE:** When the results have been returned you can view the details of the post including the name of the employee currently appointed to that post. The filter icon will change blue when the filter has been applied.

4. Click on the [ ] icon and select **Create Request From Post**.

![Staff Requests](image)

5. The Staff Request form opens with fields pre-populated.
Part 3: Complete Staff Request wizard step 1: Position

1. Check that the details are correct and update as instructed below.

<table>
<thead>
<tr>
<th>Field Name (mandatory)</th>
<th>Guidance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Organisational Structure through to Pay Administered by</strong></td>
<td>Data populated from existing post, <strong>cannot be changed</strong>. If the details in these fields are <strong>incorrect</strong>, you will need to create a Staff Request not from a post (refer to option A). Quote the post number within the Additional Information field.</td>
</tr>
<tr>
<td><strong>Cost Centre</strong></td>
<td>If required, type in the first two characters of your default GL coding to find it in the list, this will usually be the two digit department code. Format will be AA00000000000 where AA is the 2 digit department code. The coding string includes Activity followed by Source of Funds with no punctuation separators. <strong>Note</strong>: This is not where the employee’s salary will be charged to, you will have a chance to record these details later.</td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td>If required, type in the two digit department code to find your location. Data populated from existing post.</td>
</tr>
</tbody>
</table>

You may need to use the scroll menu on the right-hand side, according to your screen settings, to see the remaining fields.
Check and change if required. This should be the normal work location for the post and the default delivery address for payslips.

**Work Group** *

Select Work Group for the individual. Enter 'Core Default Work Group' if the relevant Work Group is not known/available.

New Work Groups can be requested by completing a Service Request, accessible from the HRIS Service Catalogue page.

**College Association**

Data will be populated from existing post. Update to the relevant College, or select 'Default /Not Applicable' or 'Not Yet Known', if required.

---

2. Click **Next** to continue to the next step of the Staff Request wizard.
Refer to the guidance **Section 3, complete Staff Request** (wizard steps 2-8)
3. Complete Staff Request (wizard steps 2-8)

**Wizard step 2: Contract Details**

The remaining guidance refers to all Staff Requests, whether new or created from an existing post.

1. Complete the remaining Staff Request fields as instructed.

<table>
<thead>
<tr>
<th>Field Name (* mandatory)</th>
<th>Guidance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Date *</td>
<td>Will be populated with today’s date.</td>
</tr>
<tr>
<td>Contract Duration</td>
<td>Enter the contract duration if fixed term.</td>
</tr>
<tr>
<td>Planned Start Date *</td>
<td>Always enter today’s date or the 1st of the current month for a Regrade. Do not enter a future date as this could delay the automatic email notifications. <strong>Note:</strong> You will still be able to appoint from any date after the planned start date.</td>
</tr>
<tr>
<td>Planned End Date</td>
<td>Enter the planned end date if applicable (e.g. if fixed term).</td>
</tr>
</tbody>
</table>
Category *

To identify what needs to be recorded in these two fields, you will need to refer to the Staff Classification Guide. Full guidance notes can be found on the Personnel Services website within the HR Analytics Team pages.

Note: These fields are used for statutory reporting and is especially important for HESA and REF exercises. These fields must be completed to prevent failure of interfaces to other systems.

Sub Category *

Employee Status *

Select the relevant employee status:
- Permanent
- Open Ended Externally Funded
- Fixed term
- Self-Financing

Note: The Open Ended Externally Funded option can only be given to Academic-Related staff.

Sub Status *

Select the relevant sub status e.g. Full time, Part Time, Term Time, Variable Hours.

Pay Scale *

Check / select proposed grade.

Weeks

Term-time employees only

Enter the number of weeks the employee is expected to work 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.

Hours *

Enter the relevant weekly hours, e.g. 37.5 or 0 for variable hours posts

Positions Required

Enter the number of positions required. Generally one, but can be more if all identical and to be advertised in one vacancy.

FTE *

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.

Budgeted

Use the toggle button if the post has been budgeted (follow local guidance).

2. Click Next to continue to the next Staff Request wizard step, and follow the in guidance step 3: Job Details.
## Wizard step 3: Job Details

1. Complete the fields as instructed below.

<table>
<thead>
<tr>
<th>Field Name (* mandatory)</th>
<th>Guidance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Title *</td>
<td>Select the relevant job title, or closest match.</td>
</tr>
<tr>
<td>Job Title Text *</td>
<td>Enter the actual job title (even if the same as above) as used on the job description and advert. <strong>Note:</strong> If the actual title is not yet known please copy the Job Title in this field.</td>
</tr>
</tbody>
</table>

**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 job description, 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.

**Top Tip:** Dependent on your department’s processes, use the Additional Information field to confirm who you are expecting to approve the request. The text entered in this field will be included in the automatic email which is sent to all approvers once the request is submitted.

**Note:** This field is restricted to 500 characters. If you need to send more information please attach as a word or text file.
2. Click **Next** to continue to the next Staff Request wizard step, and follow the guidance in **step 4: Job Details**.

**Wizard step 4: Vacancy Details**

1. Complete the fields below as instructed.

<table>
<thead>
<tr>
<th>Field Name (* mandatory)</th>
<th>Guidance</th>
</tr>
</thead>
</table>
| **Vacancy Type** *       | Select the relevant Vacancy Type:  
- Academic  
- Professional and Management – Generally Grade 6 and above.  
- Research  
- Support and Technical – Generally grades 1-5.  

**Note:** This is used to allocate where the will appear on the University’s jobs and vacancies web pages. Even if your vacancy is not expected to appear on the web pages this is a mandatory field. |
| **Position Type** *      | Refer to the Staff Request and Contract Decision Matrix to confirm which position type must be selected based on your scenario.  
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  

**Note:** Selecting the wrong position type can cause a delay in processing. |
2. Click **Next** to continue to the next Staff Request wizard step, and follow the guidance in **step 5: Vacancy Details**.

**Wizard step 5: Documents**

**Staff Request Documents**: Attach Job Description, Business Case, Organisation Chart, Regrading form etc., as applicable to the appointment/ type of Staff Request according to local guidance.

1. Click the **Upload Document** button and browse to locate existing document. Upload each document individually and close the **File Upload** window.

2. You can also delete documents from here by clicking **Delete**.

**NOTE**: Always ensure that you are using the current version of the job description and other templates.

The form and guidance for Regrading applications can be found on the Reward team website.

3. Click **Next** to continue to the next Staff Request wizard step, and follow the guidance in **step 6: Documents**.

**Wizard step 6: Advertising**

Only the Advertiser details will appear on the advertising screen of the vacancy record. However if it’s useful other fields can be updated and will be visible to the Staff Request approvers.
1. Enter/select where you expect to advertise the vacancy in the Advertiser fields.

2. Record any relevant Comments for the Staff Request approver.

3. Record Cost Allocation details for the Staff Request approver, using the instructions in Step 7: Cost Allocation.

4. Click Next to continue to the next Staff Request wizard step, and follow the guidance in step 7: Cost Allocation.

**Wizard step 7: Cost Allocation**

This is where you should enter the details of where you expect the salary to be costed to.
1. **Funding Details**: Select the Funding Source (A) (external or internal funding).

2. Enter the Funding Source Detail (for externally funded posts) into the free text field.

3. **Assign Cost Allocations (B)**: Specific cost allocations should be selected or the defaults entered, if you know where the salary will be costed to. Multiple lines should be completed for appointments which will have split funding allocations. The total must add up to 100%.

4. Click in the Cost Centre field for the search window to open. Search and select the relevant cost centre, by searching by the costing string or description.
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Guidance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost Centre</td>
<td>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 the Recording Cost Allocations in CoreHR document.</td>
</tr>
<tr>
<td>Project</td>
<td>Either leave blank if a GL cost centre has been selected. OR Select the relevant Project Code (Task/Sub Task). Format will be AAXXXXXX.XXX.00 where AAXXXXXX is the Project Code and XXX.00 is the Project Task and Sub Task. Take care to check the correct code has been selected.</td>
</tr>
<tr>
<td>Expense</td>
<td>This field is not in use</td>
</tr>
<tr>
<td>Date From</td>
<td>Enter start date of costing (should be the same as the planned start date).</td>
</tr>
<tr>
<td>Date To</td>
<td>Enter a planned end date if applicable.</td>
</tr>
<tr>
<td>Percentage</td>
<td>Enter 100% unless the appointment is going to be split over several cost centres.</td>
</tr>
</tbody>
</table>

5. Click **Next** to continue to the next Staff Request wizard step, and follow the guidance in **step 8: Summary**.

**Wizard step 8: Summary**

![Wizard step 8: Summary](image-url)
1. If you wish to **save** the Staff Request (without submitting it for approval).
   
a. Click **Save**. Note, you can only save a Staff Request when all mandatory fields have been completed.

   b. Mandatory fields that have not been completed will be listed in a similar message to the following. Click the 'X' to close the message and then complete the necessary fields.

2. If you wish to **submit** the request for approval:
   
a. Check the details you have entered are correct (on all eight steps).

   b. Click **Submit**. If your request has not been created from a post, or you are completing the form for the first time, you will need to click **Save** before you can click **Submit**.

   c. The Staff Request number will now appear at the top left of the window.

   **NOTE:** An email notification will be sent to all approvers to let them know you have submitted a request, please note this can take up to 20 minutes. You cannot edit a Staff Request after you submitted it.

   **NOTE:** Staff Requests created from posts can take up to 2-3 working days to be processed by the Reward Team, alternatively then can take up to 10 working days.

**NEXT STEPS:**

If you are the Approver continue to **Section 5. Approve or reject a Staff Request**. Otherwise, await confirmation that the appointment (and vacancy) has been setup.

You can check the status of the request at: **CorePortal > Staff Requests > Staff Requests > Your Requests** (for status definitions see Appendix C).

3. Close Staff Request window. **Exit** from CorePortal (Logout).
4. Edit or delete a Staff Request

When necessary, it is possible to edit or delete a Staff Request, eg to:

- Complete a previously saved, but not submitted request.
- Delete a previously saved, but not submitted request.

**Note:** Once a Staff Request has been submitted for the approver(s) to review, no changes can be made.

**Core Portal > Quick Jump > Staff Request > Staff Requests**

1. Locate the Staff Request in the **Planned** list.

2. When you have found the request you wish to edit/delete click on the **...** icon and select edit/delete:

**NEXT STEPS:**
For instructions on how to complete the request refer to **Part 2 of Section 2 Initiate Staff Request Option A / B as appropriate** followed by **Section 3. Complete the Staff Request.**
5. Approve or reject a Staff Request

Once a Staff Request has been submitted, an automatic email will be sent to anyone who has Staff Request approval access for the department stated on the request inviting them to approve / reject it.

Once approved, the Reward Team can then create a post, appointment and vacancy.

Once approved (or rejected) other approvers won’t be able to approve / reject it, they can view it by selecting the relevant status on the My Approvals tab.

CorePortal > Quick Jump > Staff Request > Staff Requests

1. All Staff Requests awaiting approval will be displayed in the My Approvals section.

2. You can use the search box to find the request in the list of outstanding Staff requests.

3. Click the icon and select View Approval for the Staff Request you would like to approve or reject.

4. Check the details of the request carefully by clicking through the steps of the Staff Request wizard on the left hand side.

5. To Approve/Reject the request click on step 8 – Summary.
If approving the request:

a) Record any relevant comments, including any which will be relevant to the Reward team. For example, Protocol number xxxxx.

b) Click Approve.

c) Close Staff Request window.

NEXT STEPS:
Approved Staff Requests are automatically passed to the Reward Team within CoreHR. The approvers will be notified when the new appointment and vacancy have been set up.

NOTE: Staff requests created from posts can take up to 2-3 working days to be processed by the Reward Team, alternatively then can take up to 10 working days.

If rejecting the request:

a) Record the reason for rejection in the Approval Comments field.

Note: An email notification will be sent to the requestor which includes the rejection reasons. The comments you add will be viewable by anyone who has security access to view the Staff Requests for your department or division.

Once the Staff Request creator receives the email, they are advised to copy the rejected Staff Request and make the changes required before resubmission.

b) Click Reject.
6. **Close** Staff Request window.

### 6. Copy a Staff Request (inc rejected requests)

There are two scenarios when you would copy a Staff Request:

i. If your Staff Request is rejected by departmental or divisional approvers the creator should copy the rejected request and amend where necessary (refer to the rejection comments added to the request by the approver, see Summary section or the automatic email). The new request will then need to be submitted for approval.

ii. If you have a request you have created previously which will be similar and the request you are copying was following ‘Option A: Create a New Request’ (refer to the Staff Request and Contract and Decision matrix).

**Note:** For scenario ii you can copy a Staff Request at any stage, e.g. Planned, Submitted, Rejected etc.

1. To copy a Staff Request click on the ![icon](image) icon and select **copy**:

Refer to the guidance in Section 3. Complete Staff Request.
Appendix A: Navigating between Staff Request Wizard steps

- Navigate to each numbered step of the wizard by:
  - Clicking on the headings eg Contract Details or;
  - Using the Previous and Next buttons.

- When you switch between different wizard steps the data you have entered will remain populated.

- There is a Save button on wizard step 8 which can be used when all mandatory fields have been created.
### Appendix B: Staff Request and Contract Decision Matrix

<table>
<thead>
<tr>
<th>Change type</th>
<th>Context</th>
<th>Raise Staff Request</th>
<th>Create New / Create From Post</th>
<th>Staff Request Position type</th>
<th>Staff Request Additional info</th>
<th>Staff Request Approval comments</th>
<th>Document to issue</th>
<th>Amend app't</th>
<th>New post</th>
<th>New planned app’t</th>
<th>Use vacancy</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a New post: TUPE transfer.</td>
<td>CONTACT YOUR HR BUSINESS PARTNER FOR GUIDANCE</td>
<td>Create From Post From Post</td>
<td>Replacement/refill</td>
<td>Context, grading reference no</td>
<td>Protocol no.</td>
<td>Cover letter &amp; contract*</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Copy of existing post with exactly the same attributes.</td>
<td>Y</td>
<td>Create Request From Post</td>
<td>New post - duplicate</td>
<td>Context, grading reference no</td>
<td>Protocol no.</td>
<td>Cover letter &amp; contract*</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Refill/replacement of leaver with exactly the same attributes.</td>
<td>Y</td>
<td>Create Request From Post</td>
<td>Replacement/refill</td>
<td>Context, grading reference no</td>
<td>Protocol no.</td>
<td>Cover letter &amp; contract*</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Refill/replacement of leaver, where grade of post is different from that of post it is replacing.</td>
<td>Y</td>
<td>Create Request From Post</td>
<td>New post - new JD/generic/generic (amended)</td>
<td>Context, grading reference no</td>
<td>Protocol no.</td>
<td>Cover letter &amp; contract*</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4a Refill/replacement of leaver, where post type (permanent, fixed term etc) is different from that of post it is replacing.</td>
<td>Y</td>
<td>Create New Request</td>
<td>New post - new JD/generic/generic (amended)</td>
<td>Context, grading reference no</td>
<td>Protocol no.</td>
<td>Cover letter &amp; contract*</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 New Post: Back-fill e.g. secondment, maternity cover or other long term absence (except where covered by casual or agency staff) with exactly the same attributes.</td>
<td>Y</td>
<td>Create Request From Post</td>
<td>Replacement/refill</td>
<td>Context, grading reference no</td>
<td>Protocol no.</td>
<td>Cover letter &amp; contract*</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 New Post: Back-fill e.g. secondment, maternity cover or other long term absence (except where covered by casual or agency staff) where grade of post is different from that of post it is replacing.</td>
<td>Y</td>
<td>Create Request From Post</td>
<td>New post - new JD/generic/generic (amended)</td>
<td>Context, grading reference no</td>
<td>Protocol no.</td>
<td>Cover letter &amp; contract*</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Change in contract type

| 12 Underfill - planned appointment already exists at substantive grade (grades 1-10 only - for all other grades consult the Reward Team). | N (send off-system request to Reward team requesting grade change on planned appointment) | None | Cover letter & contract* | N | Amend original | N |
| 13b Promotion to substantive grade (following initial appointment on underfilling basis) | Y | Create Request From Post | Existing post – contract amendment | Context, grading reference no | Protocol no. | Cover letter & contract* | N | Y | N |
| 14 Fixed to permanent/ open ended. | Y | Create New Request | Existing post - new contract | Context | Protocol no. | Cover letter & contract* | Y | Y | N |
| 15 Fixed-hours to variable hours contract. | Y | Create Request From Post | Existing post - new contract | Context | Protocol no. | Cover letter & contract* | Y | Y | N |
| 16 Variable hours to fixed-hours. | Y | Create Request From Post | Existing post - new contract | Context | Protocol no. | Cover letter & contract* | Y | Y | N |

### Change in department

| 18 Change in department due to organisational restructuring (should be processed as a transfer). Major organisation restructurings will be handled by Data Services (seek advice from HR Business Partner). | Y | Create New Request | New post - duplicate | Update department structure | Protocol no. | Cover letter & contract* | Y | Y | N |

*Unless post is filed by an internal secondment, in which case issue a secondment letter. Note 1: Wherever a new contract is issued to an existing member of staff, a new pensions enrolment action is prompted. Therefore, when issuing a new contract to an existing member of staff, it may be helpful to check whether they are currently in the pension scheme and, if not, to advise them that they will be enrolled from the start of their new contract. They can opt-out again if they wish. Note 2: Wherever the matrix states to Create New Post, you can use the Copy Staff Request function but you must only copy Staff Requests that were raised using the Create New Post function (i.e. are not linked to an existing post).
<table>
<thead>
<tr>
<th>Change type</th>
<th>Context</th>
<th>Raise Staff request</th>
<th>Create New / Create From Post</th>
<th>Staff Request Position type</th>
<th>Staff Request Additional info</th>
<th>Staff Request Approval comments</th>
<th>Document to issue</th>
<th>Amend app’t</th>
<th>New post</th>
<th>New planned app’t</th>
<th>Use vacancy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in post</td>
<td>20 Associate Professor Tutorial Fellowship (University) (30S) to/from Associate Professor Without Tutorial Fellowship (36S)</td>
<td>Y</td>
<td>Create New Request</td>
<td>Existing post - new contract</td>
<td>Context</td>
<td>Cover letter &amp; contract*</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change in post</td>
<td>21 Associate Professor Tutorial Fellowship (College) (39S) to Associate Professor Tutorial Fellowship (University) (30S)</td>
<td>Y</td>
<td>Create New Request</td>
<td>Existing post - new contract</td>
<td>Context</td>
<td>Cover letter &amp; contract*</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change in post</td>
<td>22 Titular Associate Professorship to Substantive Associate Professorship</td>
<td>Y</td>
<td>Create New Request</td>
<td>Existing post - new contract</td>
<td>Context</td>
<td>Cover letter &amp; contract*</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change in source of funding</td>
<td>23 No change to contract end date and no change in project.</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td>None</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Change in source of funding</td>
<td>25 Change in funding with change in project.</td>
<td>Y</td>
<td>Create Request From Post</td>
<td>Existing post - contract amendment</td>
<td>Context</td>
<td>Cover letter &amp; contract*</td>
<td>N</td>
<td>Y</td>
<td>N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change in source of funding</td>
<td>26 With EU rules defining new contract required.</td>
<td>Y</td>
<td>Create Request From Post</td>
<td>Existing post - contract amendment</td>
<td>Context</td>
<td>Cover letter &amp; contract*</td>
<td>N</td>
<td>Y</td>
<td>N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change of job title</td>
<td>27 Where there is no substantive change to duties/responsibilities.</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td>Letter: Change in job title</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Change to hours</td>
<td>28 Excludes to/from term time contract to other contract type.</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td>Letter: Change in hours</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Change to hours</td>
<td>29 Where moving to/from term time contract from/to other contract type.</td>
<td>Y</td>
<td>Create Request From Post</td>
<td>Existing post - contract amendment</td>
<td>Context</td>
<td>Cover letter &amp; contract*</td>
<td>N</td>
<td>Y</td>
<td>N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change to normal place of work</td>
<td>30 Change of location within same department.</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td>Letter: Change in place of work</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Contract extension</td>
<td>31 Where the project and objective remain the same.</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td>Letter: Fixed term contract extended</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Change of job title</td>
<td>32 Where the project and/or objective have changed.</td>
<td>Y</td>
<td>Create Request From Post</td>
<td>Existing post - contract amendment</td>
<td>Context</td>
<td>Cover letter &amp; contract*</td>
<td>N</td>
<td>Y</td>
<td>N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regrading</td>
<td>33 Where existing job has grown to an extent that the grade requires review</td>
<td>Y</td>
<td>Create Request From Post</td>
<td>Regrading</td>
<td>Context, JD, Application form, Org chart</td>
<td>Cover letter &amp; contract*</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Acting up/additional responsibilities</td>
<td>34 Payment to cover between 4 and 52 weeks, which reflect temporary additional responsibilities.</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td>Letters: Additional duties</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Post correction</td>
<td>35 Correcting a post (seek advice from HRIS Support before initiating this)</td>
<td>Y</td>
<td>Create New Request</td>
<td>New post - correction</td>
<td>Context why correction is required/what needs changing. Include post number of original incorrect post</td>
<td></td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Extending employment beyond the EIRF (always on fixed-term basis)</td>
<td>36 Where there is no change in grade</td>
<td>Y</td>
<td>Create Request From Post</td>
<td>Existing post - new contract</td>
<td>Context, grading reference no</td>
<td>Protocol no.</td>
<td>Cover letter &amp; contract*</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Extending employment beyond the EIRF (always on fixed-term basis)</td>
<td>37 Where there is a change in grade</td>
<td>Y</td>
<td>Create Request From Post</td>
<td>New post - new JD/generic/generic (amended)</td>
<td>Context, grading reference no</td>
<td>Protocol no.</td>
<td>Cover letter &amp; contract*</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Extending employment beyond the EIRF (always on fixed-term basis)</td>
<td>38 Where the individual is going into a new job (including where there is a change in dept.)</td>
<td>Y</td>
<td>Create New Request</td>
<td>New post - new JD/generic/generic (amended)</td>
<td>Context, grading reference no</td>
<td>Protocol no.</td>
<td>Cover letter &amp; contract*</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td></td>
</tr>
</tbody>
</table>
## Appendix C: Staff Request status definitions

<table>
<thead>
<tr>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planned</td>
<td>Staff Request has been created and all mandatory fields have been completed and the Staff Request has been saved.</td>
</tr>
<tr>
<td>Submitted</td>
<td>Staff Request has been submitted by the Staff Request creator and is awaiting department / divisional approval.</td>
</tr>
<tr>
<td>Approved</td>
<td>Staff Request has been approved by department / division and is awaiting action from the Reward team.</td>
</tr>
<tr>
<td>On-hold</td>
<td>Staff Request has been placed on hold by the Reward team.</td>
</tr>
<tr>
<td>Rejected</td>
<td>Staff Request has been rejected by the department / division or by the Reward team.</td>
</tr>
<tr>
<td>Complete</td>
<td>Staff Request is being processed by the Reward team and is going through final checks.</td>
</tr>
<tr>
<td>Authorised*</td>
<td>Staff Request has been fully processed and Planned Appointment and Vacancy are ready to use. Staff Request Department / Divisional Approvers will receive confirmation email.</td>
</tr>
</tbody>
</table>

* To find Staff Requests which are ‘Authorised’ search by the ‘Complete’ status, however you will be unable to identify whether the request is Complete or Authorised in the system. The approvers for the department will receive a confirmation email once it has been authorised by the Reward team containing the vacancy ID and planned appointment details.

## Appendix D: Checking the post is still active

1. Enter the **Post Number** and change **Status** to **All**.
1.1. Click **Search**.

1.2. Select the **View Post Profile** button (top right) to open the Post screen.

1.3. 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.

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