University of Essex

OnBase User Guide for completing Non-centralised Appointment Forms

Guidance for completing online appointment forms for non-centralised positions (under 6 months in duration and where the recruitment has been managed locally).

This is link to the online form. You will need to be connected to the University network either directly or via VPN to access the web form.

The form is broken into sections and some detail of the form will auto-populate as you fill it out. Any field that has a red asterisk is a mandatory field and will need to be entered before the form can be submitted.

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1. Appointment of Staff section

1.1 Select the appropriate Company that the appointment is for from the drop-down box.

1.2 Select the appropriate Non-Centralised appointment type

N.B: if you have selected UECS or WHH Company, you will not see the fixed term teacher or AL/GLA form.

2. Details about the Person to be Appointed section

You will need to complete these fields using the drop-down boxes where appropriate. If this appointment is for a new staff member (not a current member or student) then a new box will appear to enter a personal email address. This will be used to send the new contract prior to the first day of employment.

N.B In this section, take care to select the correct contract type, terms of appointment and hours per week (in hours and minutes).

Details about the Person to be Appointed

Title (Use drop down)*	First Name*	Last Name*
Miss	Sally	Strawberry

Personal E–mail Address*

Current Employee (Use drop down)*	Current Student (Use drop down)*
NO	NO

Previous Employee (Use drop down)*
NO

3. Details of Appointment section

In this section, enter the appointment details including:

• The correct terms of appointment

• Hours per week (in hours and minutes)

• The justification reason – this will appear automatically, and the correct reason will need to be selected.

N.B The field is highlighted in pink when it is empty and mandatory.

Details of the Appointment

Department (Use drop down)*	Will appointee have direct reports

Sub–Unit (Use drop down)*	Reporting Manager*

Job Title*

Academic appointment please confirm the contract type

Start Date*

☐ Start Date to Be Confirmed

End Date (if fixed\temporary)

☐ Permanent	☐ Full–Time	Weeks per Year (if not all year)	Contracted Hours per Week
☐ Fixed Term	☐ Part–Time		
☐ Variable Hours (agreed annually)	☐ Annualised Hours	Variable Hours	Annualised Hours
	☐ Hourly Paid via Timesheet		

4. Salary section

4.1 Select the appropriate grade from the first drop down

4.2 Select the appropriate salary point within that grade. The full-time equivalent salary will auto populate. This needs to adhere to the starting salary guidance

4.3 Incremental pay award will depend on the new appointee's start date, further guidance is here.

Salary

Grade (Use drop down) *	SCP (Use drop down) *	Salary	Incremental Pay Award Applicable (Use drop down)
UOE GRADE 05	19	£24462	YES

If you are using a spot salary, please enter the salary as a Full Time Equivalent. If the appointment is part-time this will then be pro-rated accordingly eg halved for a 0.5 FTE appointment

5. Working Pattern section

Complete the working pattern details.

N.B - In this example the appointee is working 18 hours 30 minutes per week over 4 days. If the hours in the working pattern do not match the hours input in the 'Details of the Appointment' section, an error message will be displayed warning the hours do not match. You will not be able to submit the form until this is corrected. Ensure that non-working days have 00.00 in them and are not left blank.

- If the working pattern extends over more than one week you will need to complete the hours for each week, i.e. for compressed hours where a member of staff works 9 days over a 2 week period you would need to enter the hours for week one then click 'add' and enter the hours for the second week.

Working Pattern

Does the Pattern Extend Over More than 1 Week (Use drop down)

Is It a Rotating/Shift Pattern (Use drop down)

If So How Many Weeks

Is It a Compressed Hours Pattern (Use drop down)

For Compressed, Rotating or Part Time Patterns Please Enter the Daily Hours and Minutes | Add
Please enter the working pattern in hours rather than decimals in the following format i.e. 7 hours and 12 minutes = 07.12

Monday Hours	Tuesday Hours	Wednesday Hours	Thursday Hours	Friday Hours	Saturday Hours	Sunday Hours	
07.12	07.12	07.12	__.__				Remove

6. Funding Arrangements section

6.1 Click Add and input the cost code for the salary. If the salary is to be paid from one cost code you will need to enter 100 in the cost code % box as below, if it is to be split enter the appropriate percentage, i.e., if split between 2 codes enter 50.

6.2 If using multiple cost codes click add to enter the next code split.

6.3 Attach the funding approval PDF by clicking on the 'Attach Funding Approval' button and following the usual steps.

Funding Arrangements

			Add
Unit 4 account/cost code *	Cost Code % *	Funding Approval Number *	
2040DBI0000	100	401789	Remove

The Unit 4 funding approval number needs to be entered and PDF confirmation attached.

Attach Funding Approval PDF (0)

Please use the button below to attach the funding approval PDF. *

Attach Funding Approval

7. Right to Work Checks section

If you are appointing an external candidate, you will need to complete the right to work section. Upload your full right to work check using the 'Attach RTW – General' button.

N.B. If you are making an internal appointment you will not be required to complete the RTW section and this will disappear.

Right to Work Checks

Please attach the right to work documents required to confirm that the individual named on this form has the legal right to work in the UK. This includes but is not limited to a signed and verified copy of their passport, biometric residency permit (visa), national identity card, birth certificate and national insurance number. A full list of the documents that are considered acceptable for demonstrating right to work in the UK can be found here https://www.essex.ac.uk/staff/recruiting-staff/right-to-work-checks

Please note that right to work checks should be undertaken before the individual commences work and checks on the first day of employment are not permitted. If you have any queries about the right to work document checking process please contact People & Culture.

Attach Right to Work Documentation (0)

Please use the button below to attach RTW documents *

Attach RTW – General

8.   Approval Details section

8.1 Select the appropriate approver from the drop-down box and press tab across to the next fields that will auto populate the detail.

8.2 Input your username in the 'Form submitted by Username' section and press tab.

8.3 Click on Save and Submit

Approval Details

All appointment of staff forms require approval, please use the lookup approver button below to select the relevant approver. Please note th there is only one approver available the approver field will populate with that value when you press the button, otherwise you will be presen with a selection of approvers to choose from.
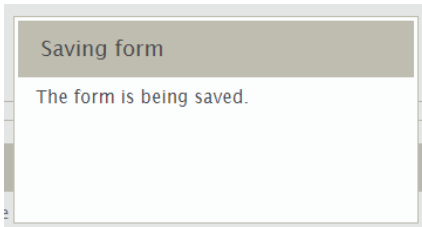
Approver *   **Approver Username**   **Approver Email Address**
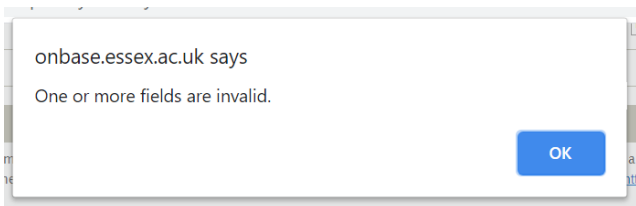
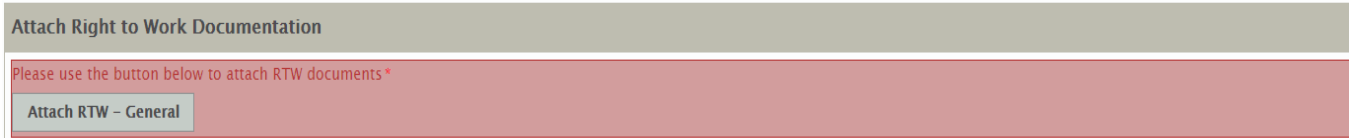[▼]   [   ]   [   ]

Form Submitted by Username *

[   ]

Submitted by Real Name

[   ]

Save & Submit

8.4 The following message will appear.

Saving form

The form is being saved.

8.5 If there are errors on the form you will see the following message.

onbase.essex.ac.uk says

One or more fields are invalid.

[OK]

8.6 After pressing OK errors will be highlighted in red, as in the example below.

Attach Right to Work Documentation

Please use the button below to attach RTW documents *

Attach RTW – General

8.7 Correct the error(s) and click on Save and Submit again.

8.8 If there are no further errors the form will be submitted. An email will be sent to the approver to authorise the appointment form. You will also receive an email once the form has been approved.