**Process Overview**

This document outlines the information required to enable us to set up a new employee transferring to the University under TUPE rules.

We recognise that we may not have full information about the new transferees at the outset. In the case of transfers involving 10 people or more it would be helpful to have some details in advance so that we can set up the posts and planned appointments.

I have listed below everything we need in order to add the transferees to PeopleXD. The fields that are desirable but not essential at each stage are shown in italics; all other fields are mandatory.

Where you have a large numbers of people transferring in the information needed to create the posts and planned appointments may be supplied to us in a spreadsheet but all of the information for the post and planned appointment listed in the table below must be included. Where there are multiple **identical** posts and appointments, the details only needed to be entered once with an indication of how many of each post type will be required.

Please note that the post structure is used to manage the University’s pay and grading structure – the grading history is recorded on the post. If the duties need to be graded, please liaise with the Reward team. Please confirm in either case whether the duties for the post have been evaluated by the Reward team, so that we can use the appropriate analysis code on the post.

In order to complete each transferee’s personnel record we will need a fully completed New Starter Data Collection form for each person as soon as possible after their arrival.

1. **For the posts and planned appointments.**

|  |  |
| --- | --- |
| **For the post** | |
| **Post title** | Generic job title from published list |
| **Effective date** | Earliest expected start date |
| **Post Profile Type** | Perm, Fixed Term etc. |
| **Division** |  |
| **Dept Name and Code** |  |
| **Default Cost Centre** |  |
| **Pay administered by** | Div or Dept. **NB** this cannot be changed once entered on the post |
| **Location** | If different from dept |
| **Category** | 1,2,3,4,9 or X as appropriate |
| **Sub Category** | Staff Classification |
| **FTE** |  |
| **For the planned appointment** | |
| **Planned End date** | (FTCs only) Alternatively please state the length of the contract. |
| **Salary £ (FTE)** | Please state Salary – Full time equivalent |
| ***Job Text*** | *The actual Job title as it appears on the employee’s contract.*  *This is required in addition to the generic job title even if it is the same.* |

1. **To appoint the transferee and add them to Payroll**

| **Person Details** | |
| --- | --- |
| **Title** |  |
| **Name** |  |
| **Address** |  |
| **Date of birth** |  |
| ***NI number*** | *Desirable but not essential at this stage* |
| **Gender** |  |
| **Bank Details** |  |
| **Appointment Details** | |
| **Actual start date** |  |
| **Target end date** | If applicable e.g. for fixed term posts |
| **Job Text** | If not already supplied for the post and planned appointment |
| **Employee Status** | If different from planned appointment e.g. FTC on permanent post |
| **Sub Status** | If different from planned appointment e.g P/T appointment on F/T post |
| **Salary £ (actual)** | Please state actual salary – pro rata if (applicable) |
| ***Increment due date*** | *(If applicable) Desirable but not essential at this stage* |
| **Cost Allocation** |  |
| **TUPE Details** | |
| **Actual hours worked** | *If part time* |
| **FTE Hours** | As per TUPE contract terms |
| **Transferring From** | *Name of University or company* |
| **Original Start date** | Start date with previous employer to ensure continuous employment |
| **Pension Details** | Confirm Pension Scheme and if was a salary sacrifice scheme? |
| **Comments** | Please add any additional relevant comments. |

1. **Right to Work Information**

| **Right to Work Type** | |
| --- | --- |
| **Permanent right to work type** | Please see table below |
| **Visa Issue Date (List B)** |  |
| **Visa Expiry Date (List B)** |  |
| **RTW undertaken by** |  |

Table 1

|  |
| --- |
| **RTW List** |
| **List A Permanent**  (British and Irish Nationals, and those with settlement/permanent right to work in the UK) |
| **List B Visa (Other)**  (All other visa types where the person has a time limited stay in the UK. Eg Global Talent, Dependant, Pre-Settled status etc) |
| **List B Visa (Sponsored)**  (Tier 2/Skilled Worker and Tier 5 (GAE) Sponsored Researchers) |
| **List B Visa (Student/Restricted Hours)**  (Tier 4/Student visa holders who are restricted on the amount of hours they can work alongside their studies) |
| **N/a Started pre 27/01/1997**  (Must only be used in historical records) |
| **Working overseas - RTW not required**  (Individual will undertake all of their employment outside of the UK) |