GUIDANCE NOTES FOR THE COMPLETION OF A POST AND CONTRACT MANAGEMENT (PCM) FORM (CHANGES)

About the Post and Contract Management (PCM) form

You may find it helpful to refer to a copy of the PCM form whilst using these notes. You can find a copy of the PCM form **here**.

The PCM form was introduced to provide a consistent and formal approach to the authorisation of posts at the University of Manchester (for both existing and new roles). It is used for budgetary control and as a reference point for contract changes.

A PCM form is required for **all** **changes** to existing posts and contracts.

The initial section of the form should be completed by the Line Manager or an appropriate School/Directorate contact. It should be authorised following local processes and final signature in the relevant matrix area.

The PCM form is valid for use for **up to 6 months** from the date of the **final authorising signatory**. After this time renewed authorisation will be required, and, in such cases, reference to the original documentation will be necessary.

i   A **separate** PCM form will be required for each **individual** employee.

PCM Reference, Contact Details

PCM Reference Number	
Manager (School/Directorate/Institute contact)	
Telephone Contact Number	

- **PCM Reference Number**
  This is defined at a local level and used by some Schools/Directorates/Institutes. Please complete where necessary.

- **Manager/Telephone Contact Number**
  Please complete the full name of the person who will act as the School/Directorate/Institute point of contact with People and OD Operations, and their telephone contact number.

Section(s) for completion

Page 1 of the PCM form provides summary details on which section(s) to complete for the various processes.

Tick the appropriate box(es) and complete the relevant section(s)

➡	Make a **Post Funding Change**	☐	**Please complete Section 1**
•	**Extend** a **Fixed-Term Contract**	☐	**Please complete Section 2**
➡	Make any other **Change to a Contract**		

Section 1

This section should be completed if you wish to make a change to the funding of a post.

Examples of this include a change to the source of funding, or a change to the % split of funding over multiple funding codes.

Section 2

This section should be completed if you wish to request an extension or any other type of change to an **existing** contract.

Please note that you can request multiple changes for an employee on the same PCM form. An example of this might be an extension to a fixed-term contract (**Section 2**) with a change of funding source (**Section 1**).

Section 1 – Make a Post Funding Change

IMPORTANT NOTES

When requesting a funding change as part of an extension to a Fixed-Term contract (or any other change where this is necessary), please complete the funding details in **Section 1** in addition to the change details in **Section 2** (see notes on Section 2 below).

If the nature of the change in **Section 2** relates to a contract conversion (e.g. from Academic Teaching to Academic Teaching and Research, or Research to Academic Teaching etc.), the funding I&E code should also be changed to reflect this (Section 1).

Funding authorisation should be considered when increasing hours.

⚠ **IMPORTANT**   **Please consider whether the employee is subject to any restrictions due to an existing employment visa when requesting changes to working hours/end dates.**

Current/Existing Post and Employee Details

Post Title			
Grade			
Faculty (Level 2)		School/Directorate/Institute (Level 3)	
Division/Department (Level 4)* [code and description] [click here]		Sub-Division (Level 5) [code and description]	
FSR HESA Cost Centre			
Employee Name			
Employee Number		Post Number	
Why is this change required?			

- **Post Details**
  Enter the details of the post that requires the funding change, including post title, current post grade, structure unit information, and FSR HESA Cost Centre.

  Please note:
  The structure details must be the **organisational/post structure** and **not** the finance/activity code structure (i.e. the post may sit in the Division of Cancer Sciences but be charged to a School Administration code).

  If the structure is changing as part of the funding code change, you need to request a new post number (this is so the staff record accurately shows the move from one area to another).

  If the funding is changing to another area but the organisational/post structure is not changing, please provide the reasons why.

- **Employee Details**
  Enter the details of the employee affected by the post funding change, including their full name (not an alias or 'known as' name), employee ID number, and, where available, the post number.

- **Reason for change**
  Enter details about why the funding change is required (e.g. project code has changed, wrong code provided at setup, moving from suspense onto project code etc.)

Funding Details

NOTE: The funding percentage must total 100% for **ALL** periods. The **I&E** code **should match** the occupancy type

Funding/Activity Code	I&E Code	Task (for all R or P codes)	Funding %	HESA Source of Funding	Dates	
				Please select an option	to	
				Please select an option	to	
				Please select an option	to	
				Please select an option	to	
				Please select an option	to	
				Please select an option	to	
				Please select an option	to	

- **Funding/Activity Code**
  Provide the post funding/activity code (e.g. AA12345, LD00001, R123456)

- **I&E Code**
  This should align with the **Occupancy Type**.

  A list of I&E codes for each Occupancy Type can be found in Appendix A. If you are unsure which I&E Code to use, please liaise with your local finance contact.

- **Task**
  Any Funding/Activity Codes with a prefix of **R** or **P** (with the exception of RZ) will also require a **Task Code**.

  Examples of commonly used task codes include A01, A0101, and B0102. Please ensure that you provide this where relevant, and that the code has been created/set up in Oracle.

  If the nature of the change in **Section 3** relates to a contract conversion (i.e. from ATO to ATR, or ATR to ATO), the funding I&E will also need to be changed to reflect this (this should be done in **Section 2**).

- **Funding %**
  Provide details of the percentage amount that should be charged to the Funding/Activity/Task.

  For example, 40% on one code, 30% on a second code, 30% on a third code.

  Please note that each funding period **must** total **100%**

- **HESA Source of Funding**
  Select the appropriate funding source from the drop-down menu.

  Further details can be found on the HESA website **here**.

- **Dates**
  Ensure that the contract duration is covered. If you are entering multiple funding sources, ensure that there are no overlaps or gaps.

Section 2 – Extend a Fixed-Term Contract/Make Any Other Change to an Existing Contract

IMPORTANT NOTES

If you are requesting an extension to a Fixed-Term contract or any other change to an existing contract and this necessitates a funding change, please complete the funding details in **Section 1** in addition to the change details in **Section 2** (see notes on Section 1 above).

If the nature of the change in **Section 2** relates to a contract conversion (e.g. from Academic Teaching to Academic Teaching and Research, or Research to Academic Teaching etc.), the funding I&E code should also be changed to reflect this (Section 1).

Funding authorisation should be considered when increasing hours.

⚠️ **IMPORTANT**   **Please consider whether the employee is subject to any restrictions due to an existing employment visa when requesting changes to working hours/end dates.**

Current/Existing Post and Contract Details

Post Title			
Grade			
Faculty (Level 2)		School/Directorate/Institute (Level 3)	
Division/Department] (Level 4)* [code and description] [click here]		Sub-Division (Level 5) [code and description]	
FSR HESA Cost Centre			
Employee Name			
Employee Number		Post Number	
Position Status (e.g. Perm/Fixed-Term/Secondment)		FTE Hours (also express as a %) (specify if hours are annualised)	
Line Manager Name		Line Manager Employee Number	

- **Post Details**
  Enter the details of the post that requires the change, including post title, current post grade, structure unit information, and FSR HESA Cost Centre.

  Please note:
  The structure details must be the **organisational/post structure** and **not** the finance/activity code structure (i.e. the post may sit in the Division of Cancer Sciences but be charged to a School Administration code).

  If the structure is changing as part of the funding code change, you need to request a new post number (this is so the staff record accurately shows the move from one area to another).

  If the funding is changing to another area but the organisational/post structure is not changing, please provide the reasons why.

- **Employee Details**
  Enter the **current/existing** details of the employee affected by the post/contract change, including their full name (not an alias or 'known as' name), employee ID number, post number (where available), position status, FTE Hours, and Line Manager.Extend a Fixed-Term Contract

Current Projected End Date		Revised Projected End Date	
Period of Extension (months/years)		Reason for Extension (e.g. additional funding)	

- **Current Projected End Date**
  State the current projected end date of the employee

- **New/Revised Projected End Date**
  State the new/revised projected end date of the employee

- **Period of Extension**
  The period of extension **must** match the period between the **current** and **new** projected end dates

- **Reason for Extension**
  State the reason for the extension here (i.e. additional funds)

Make Any Other Change to Existing Contract

Nature of Change	
Change From	
Change To	
Effective Date	

- **Nature of Change**
  Provide details about the nature of the change (e.g. change of hours, convert to Permanent)

- **Change From/Change To**
  Confirm what the current details are and what they should be changing to

- **Effective Date**
  Provide an effective date for the change.

  If this is a temporary change and the contract should revert to the current details, please also include an end date.

Authorising Signatories
To authorise the change required, the end approver as documented in the Post Approval Matrix authorises below after discussion with Head of Finance (Finance Budget Check documented below). Local processes apply, e.g. if outside of budget there may be a requirement to submit to VRG/VMG in advance of approval
You can find a copy of the Post Approval Matrix here.

FINANCE Approval for all Request Types

Print Name	Signature	Date

Staff post category		Request Type		
		Like for Like (Including replacement of external funded staff member)	**In Budget** (No financial implication including replacement of external funded staff member)	
Academic Faculty Based (Including Academic, Teaching, Clinical and Split funded Research, excluding full PS funded roles)	**G5 To G9**	**School Executive - Head of School, Head of School Operations or Head of Faculty Function** **Print Name** ____ **Signature** ____ **Date** ____		**Director of Faculty Operations/Dean** **Print Name** ____ **Signature** ____ **Date** ____
Research Funded within Faculty (Including PS Research funded roles)	**G1 To G9**	**School Executive - Head of School, Head of School Operations or Head of Faculty Function** **Print Name** ____ **Signature** ____ **Date** ____		**Director of Faculty Operations/Dean** **Print Name** ____ **Signature** ____ **Date** ____
Professional Services (Within Faculty and Central Directorates including PS Split Funded roles)	**G1 to G8**	**Head of School Operations (School) Head of Organisational Unit** **Print Name** ____ **Signature** ____ **Date** ____		**PSLT Director (Faculty Offices & Central Directorates)** **Print Name** ____ **Signature** ____ **Date** ____

		Request Type		
		Change not in budget (Financial Implication) Including year on year cost e.g. replacement of a FTC with Perm where only FTE budgeted, recruiting Full Time where Part Time budgeted, etc. New external funded roles	**Grades 1 to 8** **& all Grade 9**	
Professional Services (Within Faculty and Central Directorates including PS Split Funded roles)		**PLST Director (Faculty Offices & Directorates)** **Print Name** ____ **Signature** ____ **Date** ____		
		RSCOO **Print Name** ____ **Signature** ____ **Date** ____		

Notes/Additional Comments This can relate to any section and can include justification for sections 1 and 2.	

Data Protection

Completion of the PCM form is an essential part of the formal authorisation in relation to the recruitment and appointment process at the University of Manchester.

Please refer to the University's data protection web pages for further details on protocols:

http://www.dataprotection.manchester.ac.uk/

http://www.dataprotection.manchester.ac.uk/whatisdataprotection/generalpersonaldata/

In particular, please refer to Point 1 of the above link (General Personal Data) to provide context:

> Consent is normally required from individuals to enable the University to process their data fairly and lawfully. However, the Act does allow the processing of personal data without consent for the following purposes:
>
> - For the performance of a contract;

Appendix A
Table 1 – Summary of Occupancy Types
Please refer to the full matrix (available here) for further information.

Occupancy Type Prefix	Occupancy Type Description	I&E Code
ATO	Academic Teaching	**2003** Non-Clinical **2004** Clinical (**2001** can be used for recharges)
ATR	Academic Teaching and Research	**2000** Non-Clinical **2001** Clinical
ATOS	Academic Teaching and Scholarship	**2003** Non-Clinical **2004** Clinical (**2001** can be used for recharges)
RES	Research	2002
ADM	Administrative and Management	2010
CLER	Clerical	2012
COMPIT	Computing/IT	2015
CRAFT / MANUAL	Craft or Manual	**2019** Craft **2020** Manual
EXPOFF	Experimental Officer/Senior Experimental Officer	2002 or 2017
LIBAST	Library Assistant	2013
NURPAM	Nursing and professions allied to medicine	2001 or 2004
TECH	Technical	2017

Table 2 – Income and Expenditure (I&E) Codes

I&E Code	I&E Code Description
2000	Academic Staff (Teaching and Research)
2001	Clinical Academic Staff (Teaching and Research)
2002	Academic Staff (Research)
2003	Academic Staff (Teaching)
2004	Clinical Academic Staff (Teaching)
2005	Academic Staff – Demonstrators
2010	Administrative and Management Staff
2012	Clerical and Secretarial Staff
2013	Library Assistants
2015	Computing and IT Staff
2017	Technical Staff
2019	Craft Staff
2020	Manual Staff
2030	Pastoral Staff