

# GUIDANCE NOTES FOR CREATING A VACANCY & SENDING FOR APPROVAL

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These step-by-step guidance notes are to help hiring managers or creators of the vacancy to understand what is required in each field within the Details & Approval Tabs in Jobtrain in order to create a vacancy and send for approval.

A full list of guides & videos to help you manage the recruitment process through Jobtrain can be found on staffnet via this [link](#)

The completion of the Details & Approval form tab in Jobtrain is required for the **creation** of **all** substantive posts, Advertised or Non-Advertised.

The initial section of the form should be completed by the Hiring Manager or an appropriate School/Directorate contact. It should be authorised following local processes and final signature via the email approval process.

It 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.

Please ensure you check the form prior to submitting for approval. Recruitment will cancel the request if the form has not been completed correctly and it will need to be resubmitted including fully approved again.

## 1. Details Tab

This section should be completed if you wish to advertise a post **or** request the setup of a new post without advertising. If you are requesting a post without advertising, please provide reasons by adding notes in the job notes tab (i.e. appointing a named person on a research grant, additional post available for recently advertised vacancy etc.).

### **Job Title**

The post title field in Resourcelink fits a maximum of 40 characters (including spaces and punctuation). Post titles exceeding 40 characters will be abbreviated.

### **Employment Type**

State whether the position is Permanent or Fixed-Term.

### **No. Of Vacancies**

Enter the number of vacancies. If you are advertising multiple identical posts (i.e. all posts details, including Line Manager, are the same for each post), this can be done on one form).

### **Reason for Vacancy**

Only select 'replacement' if all post details are to remain the same. If there are any changes (i.e. to the post title, grade, job description, structure units, HERA etc.), please select 'new post'.

If you select replacement, in job notes please enter the details of the employee being replaced (full name, employee number, and, where known, the post number).

If there are specific circumstances for an overlap (i.e. handover, transition etc.), please also provide this information in the Job Notes section.

### **Contract Duration**

Please ensure you enter this in months. Or type 'PERM' if the employment type is permanent.

### **Location**

Please enter where the role will be based (North Campus Area is Sackville Street/South Campus Area is Oxford Road).

### **Hours per week**

Please add the FTE Hours as a percentage or a decimal followed by the actual weekly hours. For example, enter 50% or 0.5 FTE and 17.5 hours.

If the hours are annualised (i.e. 120 hours per annum), please specify in Job Notes.

### **Line Manager's name & Email address**

Please enter the name of the Line Manager & their email address (please do not use an alias or 'known as' name).

### **Faculty/Directorate School/Department & Division Team**

These fields should be completed for ALL posts.

Please use the drop-down boxes to select the correct area/department.

### **Sub-Division (Level 5)**

This field should be completed for all posts. Please use the drop-down boxes to select the correct Sub-Division. If this is not applicable to your vacancy, please select N/A

**People & OD Hierarchy (level 6 if applicable)**

If applicable select the relevant subdivision level 6 from the drop-down box

**Grade/Salary Range**

This should be completed for **all** posts.

If you are requesting an honorarium post, please state whether it is eligible for the pay award (this can be done in the **Job Notes** tab). Select the Grade you require for the role by using the drop-down box.

**Salary Range for advertising**

This is a free text box, where you can put the salary, you want the advert to use if it is not the same as the Grade/Salary range you have selected. For example, if hiring a lecturer who always start at grade 6.5 you can put the actual annual salary in here, or if you have someone who will be appointed on a Spot salary or with a market supplement you can put the salary in this field.

**Occupancy Type**

This must be completed for **all** posts.

Please refer to Table A for further information.

**Resourcelink Post Number**

If the post is to replace a member of staff and all the details remain the same, add the post number, if known. This should only be used for a replacement/backfill post. For a new position this field should be left blank.

**Recruitment team contact (for recruitment team only)**

This field is for the recruitment team only and must be left blank. Please do not enter any recruitment team names in this field

**Start Date**

This is for recruitment team to complete when they are ready to post the job advert as live.

**End date**

This is for recruitment team to complete when they are ready to post the job advert as live.

## [2. Approval Tab](#)

Most of the information will populate into this tab, based on the information you have provided in the Details Tab.

**Job Reference Number**

Auto populated vacancy reference number for the advert

This will be created once you have completed the form and click start approval.

**Faculty Reference Number**

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

**Requester (Faculty/Directorate contact)**

Please enter the name of the person completing the form (please do not use an alias or 'known as' name).

### Email Address

Please enter the email address of the person who is completing the form.

### Market supplement/additional allowances (please state details if applicable)

If you are offering a Market Supplement or additional allowances, please enter the amount and also any review dates

### HERA/Hay Score (please enter n/a if not applicable)

The vacancy must be evaluated via the HERA process before it can be advertised. If you haven't been allocated a HERA Code or Hay Score and don't know if the role has been evaluated, please check with your [P&OD Partner](#) before submitting the approval request. If HERA Code or HAY Score does not apply, please type N/A in the field.

Hera does not apply for academic or Research roles except Technician, Experimental Officers, or Computing/IT. For further information on HERA please click [here](#)

### People & OD Hierarchy (Level 7 if applicable)

If applicable select the relevant subdivision level 7 from the drop-down box

### Funding Code including I&E Code, Task code

Using the text box, please add in the funding code and where applicable I&E Code & any funding starting with P or R you must always provide a Task Code.

Provide the post funding/activity code (e.g., AA12345, LD00001, R123456).

If your post has an LD Recharge code, then you must check you have obtained approval from the NHS liaison Team ([nhsliaison@manchester.ac.uk](mailto:nhsliaison@manchester.ac.uk)) for this funding.

NHS Liaison must complete a Trust Recharge Agreement (TRA) form and obtain signatures of approval which should be completed prior to advertising or appointment of posts.

If the code is split, please 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%**.

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

For example, 1/01/2022 – 31/03/2022 AA12345 100%

1/04/2022 – 31/08/2022 AA67890 100%

### Source of Funding

Please select from the drop-down box the type of funding the vacancy is for.

- **Match Funded** – where a Project has internal match-funding, it indicates that a portion of the project costs will be funded by the University from internal funds in addition to external funding.
- **Baseline** – fully costed and forecasted University/Faculty/School funding.
- **Research/Project** – Fixed term Finite External funding.

### 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 Code**

Any Funding/Activity Codes with a prefix of **R** or **P** (except for 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.

### **Is this Multiple Funding**

Using the drop-down select Yes or No. Your approver will need to provide evidence of approval from the other budget holders. Details on how they do this is included in the Guidelines for Approvers guide on staffnet

### **If the funding must start on a certain date, please enter here**

If the funding has a certain start date, this must be added here. When completing the starter form for the successful candidate this date should not be prior to this one.

### **If the funding must end by a certain date, please enter here**

If the funding has a set end date, this must be entered here. When completing a starter form for a successful candidate if there is a date here then the end date on the starter form must not go past this date.

### **Is the funding start/end date Fixed or movable?**

Using the drop-down box please select if this is a fixed date or a movable date

### **Is the Role to be advertised**

Using the drop-down box please select yes, it is to be advertised via Jobtrain and no if it is not advertised (for example named on grant, direct appointment or advertised but not via Jobtrain for example advertising in a different forum). This will ensure the recruitment team are aware of the jobs that after being approved will need to be posted as a live job within Jobtrain.

### **Post Management & Talent Acquisition use only**

This section is for use by the post management & Talent Acquisition team only and these fields must be left blank

### **Job Approval workflow**

Using the dropdown box, please select the correct approval flow for the vacancy based on the approval matrix. The flows are based on the Faculty or Department, Grade and whether in or not in budget. This will then determine the correct approval emails that will be sent.

### **Upload a document**

Use this section to upload, Job descriptions, Advert templates and any other information that will be required by recruitment. If you are appointing a person specifically named on a grant, please include the grant confirmation paperwork naming the individual when the documents are uploaded.

**Please ensure each document is given a unique name when saving. You will be able to view the documents and the approvers will receive a copy when they receive the email for approval.**

### **Data Protection**

Completion of the Details & Approval tabs are 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**

<b>Academic - Clinical</b>
<b>Academic - Research</b>
<b>Academic - Teaching &amp; Research</b>
<b>Academic - Teaching &amp; Scholarship</b>
<b>Academic - Teaching Only</b>
<b>Computing/IT</b>
<b>CRUK</b>
<b>HonPay</b>
<b>Library Assistant</b>
<b>Professional Services - Grade 6 and above</b>
<b>Professional Services - Grades 1 to 5</b>
<b>Reader</b>
<b>Researcher (Assistant, Associate, Fellow)</b>
<b>Technical/Technician</b>
<b>UMC</b>

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

<b>I&amp;E Code</b>	<b>I&amp;E Code Description</b>
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