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| Navy University of Edinburgh Logo  Job Requisition Business Case | |
| **Guidance** | |
| This form MUST be completed for ALL posts including those not advertised through People and Money. It sets out the business case for seeking approval to recruit.  In line with the [Job Grading Policy](https://www.ed.ac.uk/human-resources/policies-guidance/a-to-z-of-policies-and-guidance), all new positions must be graded before you create a job requisition in People and Money.  **Before** starting the recruitment process for any new or replacement posts, including transfers and internal secondments **please check:**   * There is an existing position available with the correct grade band and with available FTE. Further guidance is available in the [Guide to Job Classifications and Positions](https://www.ed.ac.uk/staff/services-support/hr-and-finance/people-and-money-system/people-and-money-user-guides). * The position chosen is correctly linked to a job with an appropriate job level. This will ensure where the role is required to undertake HR and Finance approvals that the job level matches the authorised limits of the Delegated Authority Schedule (DAS). Further information is available within the [Guide to Employment and Finance Approvals.](https://www.ed.ac.uk/human-resources/policies-guidance/a-to-z-of-policies-and-guidance) * The [Redeployment Register](https://human-resources.ed.ac.uk/recruitment-guidance/redeployment-register)before advertising a vacancy. As a reminder, the Redeployment Register must continue to be checked throughout the recruitment process (i.e. during advertising, after the advert closes and prior to any offer being made).   **For posts that will be advertised through People and Money**   * This form should be attached to **all** job requisitions within People and Money for new or replacement posts. * An organogram/structure chart and job description should also be attached to the requisition seeking approval. * The requisition and associated attachments will be routed to the relevant Budget holder depending on the “business justification” option selected when the requisition is submitted through People and Money.   **For non-advertised posts** (for example when you are appointing a named person on a research grant)   * This form MUST be submitted for approval **offline** and as per the [Guide to Employment and Finance Approvals.](https://www.ed.ac.uk/human-resources/policies-guidance/a-to-z-of-policies-and-guidance) * The form should be approved prior to the creation of the pending worker record in People and Money. * The approved form should be attached to the Pending Worker transaction in People and Money.   Details of any contractual allowances or premium band payments applicable to this post should be included in sections 5 and 6 below.  For further information on approvals, please read the[Guide to Employment and Finance Approvals](https://www.ed.ac.uk/human-resources/policies-guidance/a-to-z-of-policies-and-guidance).  **Please do not remove any sections of the form that you may not require.** | |
| **SECTION 1: Post Information** | |
| Please select: | New Post  Replacement Post |
| School/Department/Deanery/Unit: |  |
| College/Professional Services Group: |  |
| Job Title: |  |
| Post duration: | Post duration:  Open-Ended ​  or Fixed Term ​  If Fixed Term – Expected Contract Length |
| Fixed Term Reason Code (if applicable) *–* select from drop down: | Choose an item. |
| Full-time equivalent (FTE):  Enter the FTE of the post you are seeking approval for | Full time  Part time   If part-time please specify the weekly hours or full-time equivalent ratio: |
| If replacement - will the existing employee still be in post when the replacement starts? I.e. will there be a period of overlap? | **YESNO**  If “Yes” how long will the overlap be for? |
| If replacement please provide the name of the person this post is replacing. |  |
| Planned leaving date of current post holder |  |
| Is a Disclosure or PVG Check required for the role? Please see the [Disclosure and PVG Checks](https://human-resources.ed.ac.uk/recruitment-guidance/disclosure-and-pvg-checks) webpage for details. | Not Applicable  Level 2 Disclosure Check Required  Level 2 PVG Check Required |
| **SECTION 2: Business Case to support approval of post**  **For Non - Advertised posts only complete section 1 below.** | |
| 1. State how the post is to be funded – Detail all sources of funding: amounts, duration and source details. Provide information/calculations to demonstrate that sufficient funding is available to cover the full costs of the post. (E.g. confirmation that costs are within agreed school/department budget, details of income generation that will cover the cost of the post, etc.) | |
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| 1. How will this post contribute to the school/deanery/department business? Please provide information to demonstrate the contribution in support of [our focus](https://www.ed.ac.uk/about/strategy-2030/our-focus) and [vision, purpose and values](https://www.ed.ac.uk/about/strategy-2030/our-vision-purpose-and-values) e.g. research income, student numbers, financial income, or other appropriate information. | |
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| 1. Why it is essential, operationally and/or strategically, that this post is filled or created now? Could appointment be delayed for 6 months, for example? | |
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| 1. Indicate what other possible alternatives to recruitment have been considered (e.g. stopping doing a particular activity, sharing resources/services with another part of the organisation or reorganising workloads) and why are these not suitable? | |
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| 1. If applicable, was a contractor, student or an alternative resource option considered instead of this request for a staff post? Explain why a staff post is the best option to fulfil this resource need: | |
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| **SECTION 3: Financial Planning/Salary Forecasting/Default Expense Account Code Information** | |
| Please complete the following details:  For further information please refer to the [Guidance on Job Classifications and Position Management](https://www.ed.ac.uk/staff/services-support/people-and-money-user-guides) | |
| **Position Management**  Is the total FTE for the position in People and Money being increased as part of this request?  Yes  No | Current total FTE of position in P&M (complete in all cases)  This figure is the total FTE of all post holders plus any vacant posts you have approval for in that position. |
| Additional FTE required (if changing)  If you are replacing like for like the position FTE would not increase. |
| Is the **Grade** for this position Changing as part of this request?  Yes  No | Current Grade (complete in all cases) |
| Requested Grade (if changing) |
| Grading Reference Number: |
| Financial Year: | |

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|  | **Salary Costing Details**  Please complete the salary costing details below. For further guidance please refer to the [Chart of Accounts Guidance.](https://uoe.sharepoint.com/sites/FinanceHub/SitePages/Chart-of-Accounts.aspx)  If costs related to this assignment are to be charged in part or total to cost centre 30010003 (research salary control account) a research salary management labour schedule may need to be created or amended. **Please note that a research salary management labour schedule is only required once employment is confirmed.** Please liaise with your school research administration team to provide this information if required. | | | | | | | | | | | | | | | | | |
|  | | **% Split** | | **Entity**  **(3 digits)** | | **Fund**  **(6 digits)** | | **Cost Centre**  **(8 digits)** | | **Account**  **(4 digits)** | | **Analysis**  **(6 digits)** | | **Portfolio**  **(8 digits)** | | **Product**  **(8 digits)** | | **Intercompany**  **(3 digits)** |
| **Guidance** | | **MANDATORY**  **% Split of the salary costing** | | **Driven by payroll element** | | **MANDATORY**  **Required to capture the type of funding the payroll cost is attached to​** | | **MANDATORY**  **Organisational Unit (department)** | | **Cross check against** | | **Likely to always be zero** | | **Likely to always be zero** | | **Likely to always be zero** | | **For cross charging to or from a subsidiary** |
| EXAMPLE | | 100% | | 110 | | 123456 | | 12345678 | | 1234 | | 000000 | | 00000000 | | 00000000 | | 000 |
| Directly Funded by Research- in all cases | | 100% | | 110 | | 110002 | | 30010003 | | 0000 | | 000000 | | 00000000 | | 00000000 | | 000 |
| **Costing Split** | | **% Split** | | **Entity**  (3 digits) | | **Fund**  (6 digits) | | **Cost Centre**  (8 digits) | | **Account**  (4 digits) | | **Analysis**  (6 digits) | | **Portfolio**  (8 digits) | | **Product**  (8 digits) | | **Intercompany**  (3 digits) |
| **Costing Split 1** | |  | |  | |  | |  | |  | |  | |  | |  | |  |
| **Costing Split 2** | |  | |  | |  | |  | |  | |  | |  | |  | |  |
| **Costing Split 3** | |  | |  | |  | |  | |  | |  | |  | |  | |  |
| **Costing Split 4** | |  | |  | |  | |  | |  | |  | |  | |  | |  |
| **Costing Split 5** | |  | |  | |  | |  | |  | |  | |  | |  | |  |
| **Costing Split 6** | |  | |  | |  | |  | |  | |  | |  | |  | |  |
|  | **Default Expense Account Code**   * Please complete the default expense account code below. **The only field you need to complete is cost centre**. Please note in most circumstances the cost centre code will be the same as used in the salary costing string above. * **The default expense code cannot be split**. Where there is a split salary costing, please use the cost centre related to the school/department. * For those with a Directly Funded by Research salary costing you must provide a cost centre code related to the school/department. * Further information on the chart of accounts structure is available on the [Finance SharePoint.](https://uoe.sharepoint.com/sites/FinanceHub/SitePages/Chart-of-Accounts.aspx) * For further information on claiming staff expenses please see the [Expenses webpage](https://uoe.sharepoint.com/sites/FinanceOperations/SitePages/Expenses-&-Advances.aspx). | | | | | | | | | | | | | | | | | |
| Default Expense Account Code | | | Entity | | Fund | | **Cost Centre**  **(8 digits)** | | Account | | Analysis | | Portfolio | | Product | | Intercompany | |
| Please complete **the Cost Centre only,** all other codes are the default for use during the recruitment process. | | | 110 | | 110002 | |  | | 2410 | | 000000 | | 00000000 | | 00000000 | | 000 | |

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| **Section 4: SOC/ATAS Code Allocation**  **For further guidance to help complete this section please refer to the** [**Guide to the Sponsorship of Skilled Workers and Temporary Worker Sponsored Researchers**](https://www.ed.ac.uk/staff/services-support/hr-and-finance/people-and-money-system/people-and-money-user-guides)(under the heading Recruitment & Onboarding > End to End Guides). | | | |
| **1. Is this role open to sponsorship?** | | **Yes**  - proceed to step 2 below.  **No**  - proceed to **section 5** of the form. | |
| **2. Are you opting out of sponsoring this role?**  Even if the role is sponsorable, the hiring manager can choose to opt out of sponsorship. In addition to selecting “Yes” on this form, you should also indicate this when creating the Job Requisition in People and Money by selecting “Yes” in the field titled ‘Opt out of sponsoring the successful candidate (even if the post is sponsorable)’.  Please note, in cases where a Hiring Manager has opted out of sponsoring the role and subsequently wishes to appoint a candidate who requires sponsorship, the role will need to be re-advertised with a revised sentence in the advert stating that the role can be sponsored. This is to maintain the principle of openness and fairness and give candidates that may have otherwise applied the opportunity to do so. | | **Yes**  - end here  **No**  - proceed to step 3 below. | |
| **3. Provide a UKVI SOC Code**  Only for roles in which you want to consider applicants requiring sponsorship. If you are recruiting for multiple roles which have different SOC codes you must list the role and the SOC code for each.  Further guidance on allocation of a UKVI SOC Code is available on the [Skilled Worker webpage](https://www.ed.ac.uk/human-resources/international-staff-work-uk/additional-permission-work/university-sponsorship/skilled-worker). | | **Role** | **SOC Code** |
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| **4. Provide ATAS CAH3 Code (if applicable)**  Further guidance on allocation of an ATAS CAH3 Code is available on the [Skilled Worker webpage](https://www.ed.ac.uk/human-resources/international-staff-work-uk/additional-permission-work/university-sponsorship/skilled-worker). | |  | |
| **Section 5: Contractual Allowances**  **Please complete this section if applicable, if there are multiple allowances please use the Additional Information section below.** | | | |
| Contractual Allowance Name | Choose an item. | | |
| Other – Please specify |  | | |
| Contractual Allowance Amount | £       per month | | |
| Contractual Allowance End or Review Date (dd/mm/yyyy) |  | | |

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| **Please complete the costing details below if the allowance is to be charged to a different salary costing string. For further guidance please refer to the chart of accounts guidance available on the** [**Finance SharePoint**](https://uoe.sharepoint.com/sites/FinanceHub/SitePages/Chart-of-Accounts.aspx)**.**  **If costs related this assignment are to be charged in part or total to cost centre 30010003 (research salary control account) a research salary management labour schedule may need to be created or amended. Please liaise with your school research administration team to provide this information if required.** | | | | | | | | |
|  | **% Split** | **Entity**  **(3 digits)** | **Fund**  **(6 digits)** | **Cost Centre**  **(8 digits)** | **Analysis**  **(6 digits)** | **Portfolio**  **(8 digits)** | **Product**  **(8 digits)** | **Intercompany**  **(3 digits)** |
| Description | **MANDATORY**  **% Split of the salary costing** | **Driven by payroll element** | **MANDATORY**  **Required to capture the type of funding the payroll cost is attached to​** | **MANDATORY**  **Organisational Unit (department)** | **Likely to always be zero** | **Likely to always be zero** | **Likely to always be zero** | **For cross charging to or from a subsidiary** |
| EXAMPLE | 100% | 110 | 123456 | 12345678 | 000000 | 00000000 | 00000000 | 000 |
| Directly Funded by Research- For all | 100% | 110 | 110002 | 30010003 | 000000 | 00000000 | 00000000 | 000 |
| Costing Split 1 |  |  |  |  |  |  |  |  |
| Costing Split 2 |  |  |  |  |  |  |  |  |
| Costing Split 3 |  |  |  |  |  |  |  |  |
| Costing Split 4 |  |  |  |  |  |  |  |  |
| Costing Split 5 |  |  |  |  |  |  |  |  |
| Costing Split 6 |  |  |  |  |  |  |  |  |

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| **Section 6: Premium Band Payments**  **Please complete this section if applicable.** | | |
| Premium Band Payment Percentage  (see the [Conditions of Service webpage](https://www.ed.ac.uk/human-resources/policies-guidance/conditions-service) for further information) | | Choose an item. |
| **Additional Information** (please use this space to provide any additional allowances required) | | |
|  | | |
| **Section 7: Authorised Approver (ONLY REQUIRED FOR NON - ADVERTISED POSTS)** | | |
| Authorised by: |  | |
| Job Title: |  | |
| Date(dd/mm/yyyy): |  | |