Position Management:

Recruitment and Appointment Justification Form
Quick Reference Guide

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Background

- Responding to the need for stronger control and accountability for hiring decisions.

- Budget owners can now sustainably and responsibly monitor and manage FTE levels and salary costs in line with key business growth indicators such as student and research revenue.

- The existing justification process dilutes the intended benefit of hiring controls, resulting in recruitment delays which limit the University's competitiveness and ability to attract top talent.

- A new Recruitment and Appointment Justification Form has been developed to address these issues.

- The **implementation date is 5th September 2022**

- All new recruitment and appointments (including new position requests) will require upfront approval after the release date. Noting the justification relates to the position.

- Hiring control approval (VC for academic staff, and COO for professional staff) will be included upfront in the new justification form workflow approval.

- Approvers are encouraged to clear any inflight forms before 5th September. The workflow of some inflight forms may be reset on go-live due to workflow changes. Hiring Control approval will be manually sought from the VC or COO where applicable for inflight forms not approved by 5th September.

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When do I need to complete the form?

The Recruitment and Appointment Justification Form **is required** when the following conditions are met:

1. Academic and Professional staff (excluding Casuals).

2. Fixed-term and Continuing positions (excluding Senior Appointments)

3. Requesting a New Position.

4. Position Amendments (Changes to: Position FTE Fraction, GL/HR Department, Classification (if vacant), Funding Type, Contract Type, Contract Conversions, Workload Model, Title Changes).

5. All Recruitment and Appointment Activity – including contract renewals, filling or backfilling a vacant position, secondments, direct appointments.

   a. Except contract renewals where the Funding Type is not discretionary or strategic funded (e.g., tied research, residual tied, consulting, SRIF).

How to access the form?

The new Justification Form will be available in PeopleSoft Human Resources as an eForm – through the **"eForms Homepage tile".**

Recruitment & Appointment Justification Form

Upfront approval is required before a new position, recruitment (advertising), contract renewal, secondment, or appointment is actioned. This includes all professional and academic staff positions, fixed term and continuing (excluding tied funded contract renewals).
Recruitment & Appointment Justification Form

High-level Process Flow

1. Undertake workforce and capacity planning in consultation with your Human Resources and Finance Managers before initiating the form.
2. Log-into HR eForm and complete the Recruitment and Appointment Justification eForm
3. Ensure that each question is answered comprehensively in accordance with this guide to prevent the form from being denied.
4. Once submitted, the form will follow the applicable workflow path
5. The Approver will receive a notification email advising them of the approval link.
   a. The Initiator will receive a notification when the form is fully approved (or declined).
   b. The status of the form can be tracked using the View eForm search function.
6. If approved, Human Resources is automatically notified, and they will action the request.

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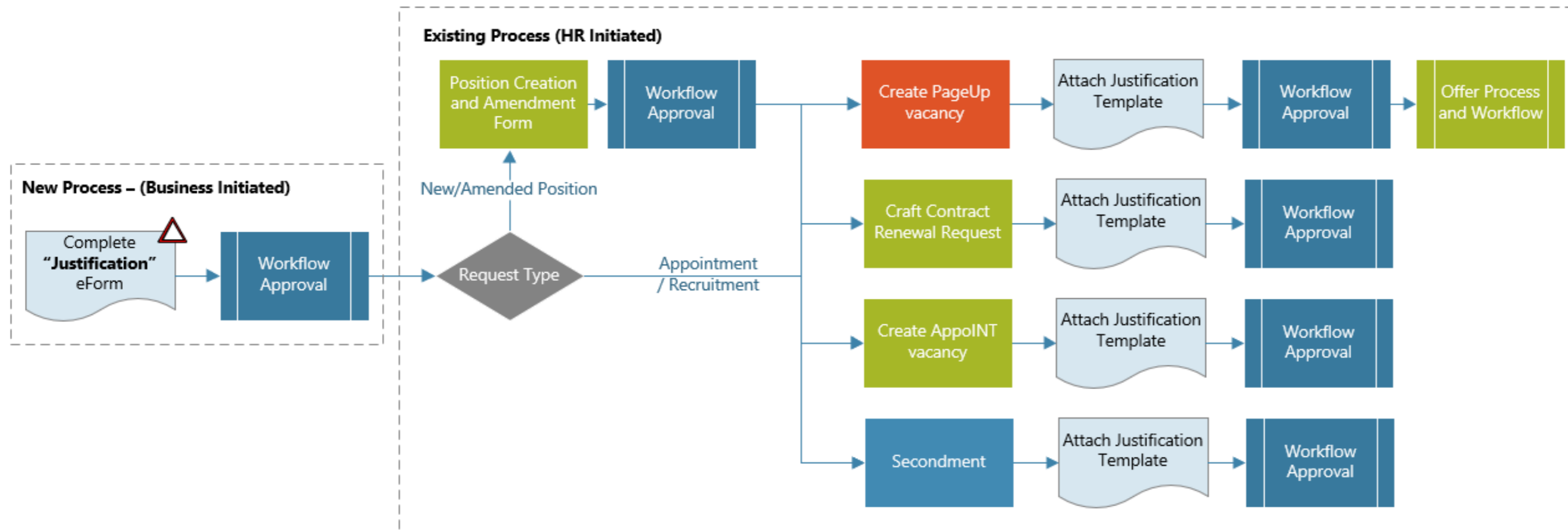
Position versus Job (incl. Funding Type)

The PDF version of the justification form will be attached to the workflow. This document is easier to review than the fluid page.

- The position stores the core attributes of the role and this information is generally static. E.g. Position FTE = 1.0

- The job, relates to the person in the role and may differ (usually temporarily) from the underlying position information. E.g. FTE = 0.8 FTE for VFWA

- Similarly, the **Position** GL Account Details is static when the position is created and this reflects who owns the position and the agreed funding type.

- This is different to the **Job** Account Details which reflect where the incumbents salary is being paid from. Usually the two sets of information are the same, but there can be instances (temporary) where they differ.

Financial GL Account Details (Position/Budget) - Who owns the position?

Primary GL Department	810	Finance Strategy & Governance
Primary GL Fund Code (first two digits of project code)	15	General Operating
Position Funding Type	Discretionary	

Financial GL Account Details (Job/Salary) - Who is paying for the salary costs?

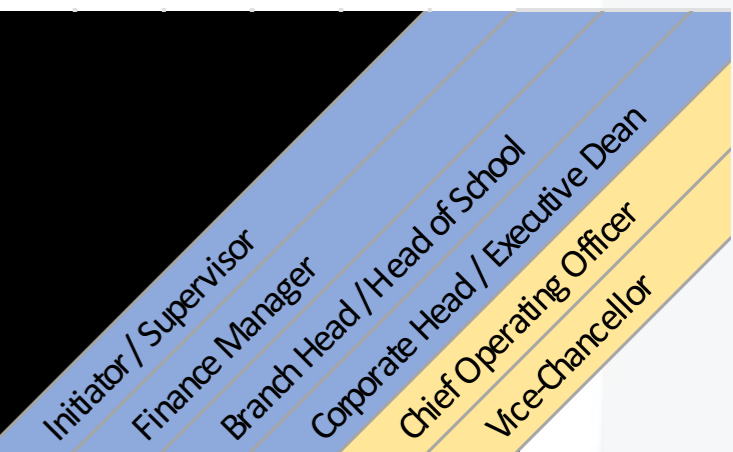|		
Primary GL Department	810	Finance Strategy & Governance
Primary GL Project Code	15017210	810 Department Earnings
Primary GL Fund Code (first two digits of project code)	10	General University Funds
Job Funding Type	Consulting Funds	
Is the role split funded?	No	

Funding Type Accepted Deviations

These rules apply where the job GL Account details (salary cost) funding type is going to be different to the Position Funding Type. These deviations should only be temporary. If permanent, a position amendment is required to permanently change the funding type.

Funding Type (Position)	Permitted funding type deviations at the Job level.
Discretionary	All Funding Types can be used at the Job level
Strategic	Strategic funded positions can never be coded to discretionary unless a funding type change has been approved via the Justification eForm.
Tied Research	Job can be coded to
Tied Operating	Tied Research
Residual Research	Tied Operating,
Co-contribution to Tied Funds	Residual Research,
	Strategic Research Investment,
Consulting Funds	Co-contribution to Tied Funds,
Strategic Research Investment	Consulting Funds.

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HR Workflow Approval

HR Workflow Approval

Recuitment and Appointment Justification Form	Award Type	Funding Type	Contract Type	Initiator / Supervisor	Finance Manager	Branch Head / Head of School	Corporate Head / Executive Dean	Chief Operating Officer	Vice-Chancellor
Requesting a new position / Fill & Backfill a Position	Academic	Tied	Continuing	•	•	•	•		HC
			Fixed-Term	•	•	•			
		Discretionary / Strategic	Continuing	•	•	•	•		HC
			Fixed-Term	•	•	•	•		HC
	Professional	Tied	Continuing	•	•	•	•	HC	
			Fixed-Term	•	•	•			
		Discretionary / Strategic	Continuing	•	•	•	•	HC	
			Fixed-Term	•	•	•	•	HC	
Contract Renewal (FTC)	Academic	Tied	All	Not Applicable - Out of scope					
		Discretionary / Strategic	All	•	•	•	•		HC
	Professional	Tied	All	Not Applicable - Out of scope					
		Discretionary / Strategic	All	•	•	•	•	HC	
Position Amendments (Financial Impact)	Academic	All	All	•	•	•	•		HC
e.g. FTE Fraction, Funding Type, Contract Type, Classification	Professional	All	All	•	•	•	•	HC	
Position Amendments (Non Financial Impact) e.g. Title Change, Workload Change, GL Dept, HR Dept	All	All	All	•		•	•		

Change Management and Communication

Support Resources

- Recruitment & Appointment Justification Form User Guide

- Approver & Reviewer Responsibility Guide

- Position Management & Hiring Control website has been refreshed

- The HR Service Centre will provide first level support to the business.

  hrservicecentre@adelaide.edu.au

- Human Resource Managers' are available to provide subject matter expertise when preparing justifications and Finance Managers' are available to provide advisory support for School/Branch budget/forecast considerations.

- Some minor enhancements will be released in the coming months and a post implementation review will be conducted.

Communication Plan

- Staff News Bulletin 5th September

- Justification Form released 5th September

- Approver Targeted Comm 5th September

- HR Website updates published 5th September

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Escalation Matrix

The escalation matrix provides clear escalation points when issues are encountered during the initiation of a justification eform, approval or processing of the form.

Issue	First Level Support	Second Level Support
Issue completing the form, eForm error, bug	Self-service using the user guide and position management website	HR Service Centre Manager, HR Services
Require justification support	Local HR Manager	Manager, HR Partnerships & Advisory
Require financial advice	Faculty & Division Finance Managers	Manager, Faculty & Division Finance
GL account information queries	Finance & Accounting Services	Manager, Management Accounting & Reporting Manager, Research & Financial Accounting
Issue with details on the submitted form. If issue is serious, use decline button.	Initiator	Branch Head/Head of School Corporate Manager
Error with the eForm (needs correcting)	HR Service Centre	Current Workflow Recipient
Check status of the form	Self-service – using view Form lookup to see workflow steps	HR Service Centre

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Approver Guide

Approver Overview

- Justification eForms are approved in the [HCM SSO Approval list](#)

- A notification email is sent to the approver with a link to the approval worklist

- A PDF version of the Justification eForm is automatically attached when the form is submitted. It can be found in the attachment list and is useful when reviewing.

- Review the form paying particular attention to key fields such as the type of request, contract type, classification, funding type (position/job differences) and the adequacy of justification questions.

- Approve form if satisfied, or decline the form with commentary if you are not satisfied with the information provided.

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Notifications

Notifications are sent to the Initiator on final approval and rejection. An email is sent to the Approver advising of pending approvals. Once fully approved, and email is sent to HR for processing the form.

Submitted – pending approval

An appointment and recruitment request has been submitted for your approval.

Form ID:	601
Request Type:	Request New Position
Position Number:	NA
Position Title:	test
Classification:	HEO Level 7
Employment Type:	Continuing
Contract Type:	Professional Staff
Requested By:	Kumar Bohra

Please review the request and action as appropriate.

Should you have any questions about this request, please contact the HR Service Centre on 8313 1111.

The University of Adelaide, AUSTRALIA 5005

Note: Please do not reply to this email. This mailbox does not allow incoming messages.

Approved – sent for processing

Your appointment and recruitment request has been approved and forwarded to Human Resources for action.
If the request relates to a contract renewal, please initiate the CRAFT renewal process in accordance with this approval.

Form ID:	601
Request Type:	Request New Position
Position Number:	NA
Position Title:	test
Classification:	HEO Level 7
Employment Type:	Continuing
Contract Type:	Professional Staff
Requested By:	Kumar Bohra

Please use the following link to view and download the approved request: Click here

Should you have any questions about this request, please contact the HR Service Centre on 8313 1111 and quote the Form ID above.

Clicking Review the Request will take you into the SSO/Fluid worklist in PeopleSoft or you can navigate to this worklist manually by logging into SSO.

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Workflow Approval Screen

The PDF version of the justification form will be attached to the workflow. This document is easier to review than the fluid page.

Approve | Decline

Position Details

Request Type	Request New Position	**eForm ID**	200
Position Number	NEW	**Created By**	a1231367
Position Title	testWF	**Datetime**	01/08/22 - 3:31 PM
Professional/Academic	Professional Staff	**Primary GL Department (Position/Budget)**	810 Finance Strategy & Governance
Employment Type	Continuing	**Primary GL Fund Code (first two digits of project code) (Position/Budget)**	10 General University Funds
Faculty/Division	S800 Division of University Operations		
School/Branch	S851 Information Technology and Digital Services	**Position Funding Type**	Tied Operating
HR Dept	8660 ITDS Digital Transformation	**Primary GL Department (Job/Salary)**	810 Finance Strategy & Governance
Salary Plan / Classification	HEO HEO Level 2	**Primary GL Project Code**	10000600 Special Fund
Position FTE Fraction	1 36.75 hrs per week		
FTE Fraction (being filled)	1 36.75 hrs per week	**Primary GL Fund Code (first two digits of project code) (Job/Salary)**	10 General University Funds
Reports To Position	00021965 Manager, ITDS Core Platforms Tylana Hill		
Annual Salary Cost (incl. oncosts, loadings, allowances, and bonuses)	$1,000.00	**Job Funding Type**	Co-contribution to Tied Funds
Estimated Loadings, Allowances, and Bonuses (excl. oncosts)	$100.00	**Is the role split funded?**	No
When are you intending to fill this position?	01/08/22		
Anticipated Appointment Type	Unknown/Other		

Example Form and PDF Output

Recruitment & Appointment Justification Form

eForm ID   598   ▾ Print

This form and the questions relate to the position being requested or filled, and with the exception of a contract renewal does not relate to the person in the position. The questions refer to what you intend to do with the position, and this may differ to what actually eventuates during the recruitment and appointment process. Refer to the User Guide for assistance in completing or understanding any of the questions on this form.

▾ Position Details

Field	Value
Request Type	[dropdown]
Position Title	[text field] 🔍
Professional/Academic	[dropdown]
Faculty/Division	[text field] 🔍
*School/Branch	[text field] 🔍
HR Dept	[text field] 🔍
Salary Administration Plan	[dropdown]
Classification	[dropdown]
Position FTE Fraction	[text field]
FTE Fraction (being filled)	[text field]
Reports To Position	[text field] 🔍
Supervisor Name	
When are you intending to fill this position?	[text field] 📅
Anticipated Appointment Type	[dropdown]

▾ Financial GL Account Details (Position/Budget) - Who owns the position?

Field	Value
Primary GL Department	[text field] 🔍
Primary GL Fund Code (first two digits of project code)	[text field] 🔍
Position Funding Type	[dropdown]

▾ Financial GL Account Details (Job/Salary) - Who is paying for the salary costs?

Field	Value
Primary GL Department	[text field] 🔍
Primary GL Project Code	[text field] 🔍
Primary GL Fund Code (first two digits of project code)	[text field] 🔍
Job Funding Type	[dropdown]

▾ Position Justification

Refer to the User Guide for guidance on what information should be considered and included (not exhaustive) when answering the following justification questions. The information provided should be detailed and comprehensively justify the request.

Provide a detailed explanation regarding the business need for this position, and describe what activity the incumbent will be performing, and the benefit to the University. [text area]

Have you considered alternatives such as existing resourcing capacity and/or capability to absorb work within the business area and in doing so can the recruitment be postponed without unduly impacting on current operations? [text area]

Can you nominate a corresponding drop in budgeted FTE from within the Faculty/Division? [dropdown]

Is there financial capacity within the overall School/Branch budget/forecast to accommodate this appointment having also considered all planned resourcing activity? [text area]

▾ Submit for approval

[Add File Attachment]

Comment [text area]

☐ I confirm that I have sought advice from Finance and Human Resources to support this request, and that to the best of my knowledge the justification provided in this form is true and correct.

[Save for Later]   [Generate PDF]   [Submit]

Justification Form – PDF Output

Position Details

Request Type	Fill & Backfill Position
Position Number	00012565
Position Title	Head, School of Psychology
Reports To Position	00007457 - Exec Dean, Faculty of H&MS
Supervisor Name	Benjamin Kile
Are you also requesting to amend the position?	Yes
Professional/Academic	Academic Staff
Employment Type	Fixed Term Contract
Faculty/Division	S300 - Faculty of Health and Medical Sciences
School/Branch	S365 - School of Psychology
HR Dept	3870 - Psychology
Position FTE Fraction	1 FTE - 36.75 hrs per week
FTE Fraction (being filled)	1 FTE - 36.75 hrs per week
Length of Contract (or length of Contract Extension)	6 Months
Annual Salary Cost (incl. oncosts and loadings)	$119000
Estimated Loadings, Allowances, and Bonuses (excl. oncosts)	$1000
When are you intending to fill this position?	Wed, Aug 24,2022
Anticipated Appointment Type	Direct Appointment
Workload Allocation	Education Specialist

Financial Account Information (Position/Budget)

Primary Financial Department	387 - Psychology
Primary Fund Code (first two digits of project code)	15 - General Operating
Position Funding Type	Discretionary

Financial Account Information (Job/Salary)

Primary Financial Department	387 - Psychology
Primary Project Code	15009400 - Psychology Operating
Primary Fund Code (first two digits of project code)	15 - General Operating
Job Funding Type	Discretionary
Is the role split funded?	No

Position Justification Questions

1) Detail any previous contract extension history for the current incumbent in this position, and specify if the incumbent has been through a merit based selection process.
Demonstration

2) Provide an explanation outlining why this position needs to be renewed, and describe what activity the occupant will be performing.
Demonstration

3) Outline the original purpose/reason for the position, and describe how the incumbent has performed in relation to delivering against the intended objectives. Is an extension warranted?
Demonstration

4) What is the impact/consequence of not proceeding with this request?
Demonstration

5) Have you considered alternatives such as existing resourcing capacity and/or capability to absorb work within the business area and in doing so can the recruitment be postponed without unduly impacting on current operations?
Demonstration

6) Is the position currently in the budget/forecast and is there financial capacity within the overall School/Branch budget/forecast to accommodate this appointment having also considered all planned resourcing activity?
Demonstration

Position Justification Workflow Status

Reviewer - Finance:
Normal - Pending
Kaustubh Mukund Patil, Thu,Aug 11,2022 at 08:08:17

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