

## Contractor IR35 Request Guidance

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# 1. Logging in and accessing your forms

Go to <https://jobs.leeds.ac.uk/MyRecruitment/>

Single sign on will enable you to log into the system, with no requirement to enter other usernames or passwords. Click 'staff login' to enter the online recruitment system.

Please note: Javascript and cookies must be enabled to use this website

## University of Leeds Staff Login

If you are a member of staff at the University of Leeds, please click the "Staff Login" button to access this site.

Staff Login

### Staff Requests

New Request

Search Requests

Go

Click on the **Staff Requests** Header, and the Staff Requests Dashboard will appear.

To start a new request, click on the **Create New** icon at the top right of the screen.

When the dialogue box with several choices of form appear, select **Resource needed to deliver a role or activity** from the list.

### Create New Request

Please select the type of request you wish to make:

#### Resourcing Requests

[Resource needed to deliver a role or activity](#)

[Act Up/Additional Responsibilities](#)

[Change to existing arrangement](#)

[Promotion \(Resourcing Request\)](#)

#### Promotions

[Academic Promotion Application](#)

[Academic Promotion Appeal](#)

You will be prompted to select an Engagement type.

Select **Contractor IR35** from the drop down menu.

**Create New Request**

**Engagement Type**

Please select the appropriate way to engage the individual:

Contractor IR35

Please refer to the manager guidance document to ensure the correct type is selected.

Continue Return

Click on **continue** to open the request form.

## 2. Filling in Request Details

You can begin to complete the form.

**Note:** that you can save your form at any time, and return to it at a later date by clicking on **save**.

**Resource Request**

Save Submit Delete

Online Staff Request Form

Job Title: [ ]

Engagement: Contractor IR35

Insert the **job title** here.

The **Engagement type** will automatically populate.

Online Staff Request Form

Job Title: [ ]

Engagement: Contractor IR35

Faculty/Service: [ ]

School/Institute: [ ]

Section: [ ]

HR Officer: [ ]

Finance Manager: [ ]

Line Manager/PI: [ ]

Post Type: [ ]

- External - not a University role
- Facilities Directorate
- Faculty of Arts, Humanities & Cultures
- Faculty of Biological Sciences
- Faculty of Business
- Faculty of Engineering & Physical Sciences
- Faculty of Environment
- Faculty of Medicine & Health
- Faculty of Social Sciences
- Professional Services
- Student Education Service
- Teaching Excellence and Innovation

Select the correct **Faculty/Service**, from the drop down menu.

Online Staff Request Form

Job Title: [ ]

Engagement: Contractor IR35

Faculty/Service: Faculty of Biological Sciences

School/Institute: [ ]

Section: [ ]

HR Officer: [ ]

Finance Manager: [ ]

Line Manager/PI: [ ]

- Astbury Centre
- Biological Sciences Faculty Offices
- Central Biomedical Services
- School of Biology
- School of Biomedical Sciences
- School of Molecular & Cellular Biology
- School of Molecular & Cellular Biology / Astbury Centre for Structural Molecular Biology

Select the correct **School/Institute** from the drop down menu.

Online Staff Request Form

Job Title: [ ]

Engagement: Contractor IR35

Faculty/Service: Faculty of Biological Sciences

School/Institute: Biological Sciences Faculty Offices

Section: Biological Sciences Faculty Offices

The **Section** will automatically populate. **NOTE:** if this does not happen please select the correct section.

**Online Staff Request Form**

Job Title:

Engagement:  Contractor IR35

Faculty/Service:

School/Institute:

Section:

HR Officer:

Finance Manager:

Line Manager/PI:

Select the **HR Officer/Finance Manager/Line Manager** (options will appear in the drop down menu).

**NOTE:** these boxes are greyed out, but they are **required fields**. If you're unsure of what to enter, please contact your local HR team in the first instance.

### 3. Post Type

#### 3.1 Full Time

HR Officer:

Finance Manager:

Line Manager/PI:

Post Type:  Full Time  
 Part Time  
 Variable

Select **Full Time** from the options.

#### 3.2 Part Time

HR Officer:

Finance Manager:

Line Manager/PI:

Post Type:  Full Time  
 Part Time  
 Variable

Select **Part Time** from the options.

#### 3.3 Variable

**NOTE:** The variable option is to be used for **hourly paid staff only**

HR Officer:

Finance Manager:

Line Manager/PI:

Post Type:  Full Time  
 Part Time  
 Variable

Name and Details of Payee: (if known):

Agreed Fee:

ESS Checklist:  I confirm the ESS checklist has been completed and forwarded to your HR team to confirm tax/NI status and payment method

Hourly Rate:

Select **Variable** from the options.

An **Hourly Rate** box will appear further below for you to complete.

### 4. Payee Details

variable

Name and Details of Payee: (if known):

Agreed Fee:

ESS Checklist:  I confirm the ESS checklist has been completed and forwarded to your HR team to confirm tax/NI status and payment method

Hourly Rate:

Insert the **Name and Details of the Payee**.

Insert the **Agreed Fee** to be paid.

**REMINDER:** If you have selected the **Variable** option, ensure you've inserted the **hourly rate** here.

Tick the **ESS Checklist** box to confirm.\*

\*This box should be ticked to state that you have checked the **Employment status of the individual**. Further guidance can be found [here](#).

Anticipated Start Date:

Anticipated End Date:  OR Duration:  (months)

Hybrid Working:  Yes  No

Insert the **anticipated start date**.

Insert the **anticipated end date** OR the **duration of the post (in months)**.

Is this role suitable for **Hybrid working**? Select **Yes** or **No**.

## 5. UK or Overseas

### 5.1 UK roles

Hybrid Working:  Yes  No

UK or Overseas:  UK  Overseas

Location of Role:

Required Overseas:

New or in Plan:

Does the post require a DBS:

Job Description:

Funding Method:

Salary Account Code:

Business Case:

For **UK** based roles, select the **UK** option.

Select the appropriate option from the **Location of Role** drop down menu.

UK or Overseas:  UK  Overseas

Location of Role:

Required Overseas:

Will the post holder be required to spend time overseas (e.g. field trips):  Yes  No

Will the post holder be required **overseas**? Select **yes** or **no**. Click [here](#) for further information.

### 5.2 Overseas Roles

**\*(1) NOTE FOR ANY OVERSEAS WORKING\***: Any role which requires the employee to spend time overseas, needs to be discussed with the International Team prior to approval being progressed. If this discussion hasn't been held yet, the resource request form **cannot** be submitted.

UK or Overseas:  UK  Overseas

Location of Role:

Name of Partner Institution:

Discussion Held:

For **Overseas** based roles, select the **Overseas** option.

Select the appropriate option from the **Location of Role** drop down menu.

UK or Overseas:  UK  Overseas

Location of Role:

Name of Partner Institution:

Discussion Held:  Discussion held with HR International Team:  Yes  No

Enter the name of the **Partner Institution**.

If you have selected **Overseas** as your option, as noted above, you must be able to select **yes** to this option or the form cannot be submitted (**see note (1) above**).

## 6. New to plan or in plan

### 6.1 New to plan

New or in Plan:  Is the post new to plan or in plan:  New to Plan  In Plan

If the post is **new to plan**, select this option and move on with the form.

## 6.2 In Plan

New or in Plan:  New to Plan  In Plan

Is this a replacement post:  Yes  No

If the post is **in plan**, select this option and select if it is a **replacement post**.

New or in Plan:  New to Plan  In Plan

Is this a replacement post:  Yes  No

Previous Post Holder:

Post Holder Status:  Resigned  Left the post already  Required temporary cover

Is the post:  Comparable  Has significant changes

If the post is a **replacement**, select this option and **record the name of the previous post holder** in the free type field below.

New or in Plan:  New to Plan  In Plan

Is this a replacement post:  Yes  No

Previous Post Holder:

Post Holder Status:  Resigned  Left the post already  Required temporary cover

Post Holder End Date:

Is the post:  Comparable  Has significant changes

Select the **post holder status**; if they have **resigned**, select this option and **complete the end date**.

New or in Plan:  New to Plan  In Plan

Is this a replacement post:  Yes  No

Previous Post Holder:

Post Holder Status:  Resigned  Left the post already  Required temporary cover

Is the post:  Comparable  Has significant changes

If they have **left the post already**, select this option and move on with the form.

New or in Plan:  New to Plan  In Plan

Is this a replacement post:  Yes  No

Previous Post Holder:

Post Holder Status:  Resigned  Left the post already  Required temporary cover

Reason for Cover:

Is the post:  Comparable  Has significant changes

Does the post require a DBS:  Yes  No

Internal Only:  Yes  No

If the request is **required temporary cover**, enter the **reason for cover** from the drop down menu.

**Note:** If you select **Other** as the reason for cover, you will be required to give further details in the box that appears.

New or in Plan:  New to Plan  In Plan

Is this a replacement post:  Yes  No

Previous Post Holder:

Post Holder Status:  Resigned  Left the post already  Required temporary cover

Reason for Cover:

Details:

Is the post:  Comparable  Has significant changes

Is the post **comparable**? Select this option if the role is comparable to the original Job description.

Have **significant changes** been made to the job description? Select this option if changes have been made to the role which will require it to be regraded.

## 7. Further Details

### 7.1 DBS

Does the post require a DBS:  Yes  No

State here if a **DBS check** will be required for the post; if you are unsure whether the post meets the requirements, contact your local HR team in the first instance or read further guidance [here](#).

### 7.2 Funding Method

Is this a replacement post:  Yes  No

Does the post require a DBS:  Yes  No

Job Description: [Upload new document](#)

Funding Method:

Salary Account Code:

Select the **funding method** from the drop down menu.

Does the post require a DBS:  Yes  No

Job Description: [Upload new document](#)

Funding Method:

Salary Account Code:

If you select **Core funded**, enter the **Salary Account code** in the free type field below.

Funding Method:

Salary Account Code:

Research Finance Manager:

If you select **Research Grant** or **Mixed Funded**, enter the **Salary Account code** in the free type field below.

Select the **Research Finance Manager** from the drop down menu.

## 8. Business Case

Business Case

Business Case

Enter the **Business case for the post**.

You can now click on **Submit** to submit your form for the next stage of approval.

**NOTE:** When you press submit, if you have made an error on the form, error messages will appear at the top of the screen. You will need to amend the errors before you can submit the form:

### Lecturer

- Please fix the following errors before you continue:
- Enter the reason for cover [\[Go To Error\]](#)
  - Enter the details regarding restrictions on areas [\[Go To Error\]](#)
  - Enter the full details of where you would like the post advertised, the costs involved and how they will be met [\[Go To Error\]](#)
  - You must remove all \*\*\*\*s from main duties and responsibilities [\[Go To Error\]](#)
  - You must remove all \*\*\*\*s from additional information [\[Go To Error\]](#)
  - You must remove all \*\*\*\*s from criminal records [\[Go To Error\]](#)

Request Details Job Advert Selection Criteria

Selection Criteria

Some text about what should be in the selection criteria here

The form will then be submitted for HR approval, followed by any other required approvals.

## 9. Tracking your requests

You can see what stage, and where your request is by selecting **Return to Requests** in the top right of the screen.

Return to Requests

Messaging Save Withdraw Approve Reject

Alternatively, you can select **My Recruitment** from the top left of the screen.

Home My Recruitment Email HR Department Leave Feedback / Report Bug Admin Log Off

Request Admin Print/Download Request

From the main Stonefish dashboard, click on the **Staff Requests** tile in the bottom left of the screen.

## My Recruitment & Promotions

My Details

**Jobs**  
Advanced Search  
Search Jobs  Go  
Jobs by Email  
Jobs by RSS

**Academic Promotions**  
New Promotion Application  
All Applications

**Redeployment**  
Redeployment Details  
Redeployment Jobs

**Staff Requests**  
New Request  
Search Requests  Go

**Vacancy Management**  
Search Jobs  Go  
Search Applications  Go

**System Administration**  
Vacancies  
Search Vacancies  Go  
Redeployment  
Site Users

Your main **Staff Requests** dashboard will then open.

Welcome to Staff Requests Create New

Search:  ID, Job Title or Applicant Name

Show Filter

**Pending**

Type	Job Title	Type	Last Update
Change Request	Officer 2	Act Up	11/05/2022 15:01
Change Request	Officer 2	Act Up	11/05/2022 15:00
Change Request	HR Officer	Act Up	11/05/2022 14:57
Change Request	HR Officer	Act Up	11/05/2022 14:56
Change Request	TEST RM ADMIN	Act Up	11/05/2022 14:51

There are 2 requests which require an action on your part and are marked with **(Action Required)**

**Resource Requests** | **Change Requests** | Promotions (Resourcing) | Academic Promotions | Promotion Appeals | Requiring Job Creation (0)

Show:

ID	Job Title	Engagement	Faculty/Service	Status	Last Update
0054-22	Test	Employee	Faculty of Medicine & Health	Faculty of Medicine & Health Finance Approval <b>(Action Required)</b>	11/04/2022 16:41
0088-22	UEG Approval Test 1	Employee	Facilities Directorate	Submitted to HR	09/05/2022 11:55
0087-22	HR Assistant	Employee	Faculty of Medicine & Health	Submitted to HR	06/05/2022 21:25
0080-22	Finance Manager Test	Employee	Faculty of Arts, Humanities & Cultures	Rejected	05/05/2022 10:28
0074-22	XXXX	Employee	Faculty of Medicine & Health	Finance Approval	27/04/2022 16:10
0065-22	Admin assistant 2	Temp/Agency	Faculty of Environment	Head of School/Institute Approval	21/04/2022 15:33
0050-22	XXXXXXXX	Employee	Faculty of Medicine & Health	HR Approval	06/04/2022 11:10
0034-22	New employee test	Employee	Faculty of Medicine & Health	Rejected	06/04/2022 09:54

You can see all saved drafts.

You can see where each of your requests is in the process.

You can see if there are any requests that require your action.