A guide to:

Post-award grant management

Appointing and managing contract research staff

Last updated 14th March 2019

Managing Research Grants & Research Staff

Faculty of Health & Life Sciences

Contents:

**1.1 F**[**irst steps once an award has been made……………………………………………………………….3**](#_Toc405452400)

1.1.1 Award letter….…… ………………………………………………………………………………...………3

1.1.2 Ethics……………………………..……………………………………………………………………………3

1.1.3 Finance……………………………………………..…………………………………………………………3

1.1.4 Publicity…………………………………………………………………………..……………………………3

1.1.5 Converis………………………………………………………………………………………………….……3

**1.2 The Principal Investigator’s overall role in managing grants……………………………………...…4**

1.2.1 Outcomes, reporting and open access……………………………………………………………….……4

**1.3 The Principal Investigator as manager……………………………………………………………………5**

1.3.1 Office and Lab Space………………………………………………………………………………..………6

1.3.2 Athena Swan………………………………………………………………………………………………….6

# 1.4 Recruitment and selection of research assistants……………………………………………………..6

1.4.1 The Finance Activity Code……………………………………..…………………………………………...6

1.4.2 Job Descriptions/Person Specs…………………………………………………………………………….7

1.4.3 Using the CORE HR system – Raising a Staff Request…….…………………………………………...7

1.4.4 Advertising………………………………….…………………………………………………………………8

1.4.5 Short-listing and Interview arrangements………………………………………………………………….9

1.4.6 Named Researcher……………………………………………………………………………………..….10

1.4.7 Replacing an existing researcher…………………………………………………..…………….…….…11

1.4.8 Casual and Variable Posts………………………………………………………………………………...11

**1.5 Induction of new staff………………………………………………………………………………………12**

1.5.1 Health & safety, risk assessment and overseas travel…………………………………………………12

**1.6 On-going management……………………………………………………………………..………………13**

1.6.1 TRAC…………………………………………………………………………………………………………13

1.7 Career Development of Contract Research Staff……………………………………………………...14

1.8 End of contract/Extension of contract…..………………………………………………………………15

1.8.1 Redeployment………………………………………………………………………………………………16

1.9 Contacts………………………………………………………………………………………………….……16

**APPENDIX A – Expenses and expenses claim forms procedures……………………………..……….20**

**Overview**

This document provides a guide to the key processes involved in managing research grants and the appointment and management of research assistants on research grants (whether funded internally or externally). Further details can be found on the HR website or advice can be sought from the Faculty link HR team (see list of contacts and their specific roles in recruitment at the end of this document, section 1.9).

# 1.1 First steps once an award has been made

***1.1.1 Award letter***

If you have won an externally funded research grant, congratulations! Please forward the award letter and the start certificate (if relevant) to Paul Carolan, Post-award Processes Officer in RBDO (see contacts), who will arrange University acceptance of the award and request that a new finance activity code is set up for your grant. If your award involves the signature of a contract RBDO’s Contracts Team will review the contract terms and arrange for University signature.

***1.1.2 Ethics***

Please note that no data gathering should take place until research ethics approval has been granted. Please refer to the following link for full details of Ethics procedures. Kellie Tune is the Faculty Research Ethics Committee Chair and can provide advice on any issues raised by the research and the ethics approval process:

<http://www.hls.brookes.ac.uk/research/ethics>

National Research Ethics Service (NRES):

<https://www.hra.nhs.uk/about-us/committees-and-services/res-and-recs/>

***1.1.3 Finance***

We would strongly encourage you to arrange a brief meeting with your Faculty Finance Team before your project begins and then quarterly or every six months (at the latest), to discuss the financial administration of your grant. They will deal with all aspects of preparing and posting overhead journals, raising invoices to the funder, and coding and paying supplier invoices.

A regular system of automated finance reports will be put in place shortly. In the meantime finance reports can be requested from Faculty Finance. They will run the report for you and go through it with you, if you wish.

Researchers are encouraged to use Converis to monitor actual project expenditure (from e5) against the allocated project budget (from pFACT). See section 1.1.5 on Converis.

It is good practice for PIs to keep their own record of project expenditure as a cross-reference to Faculty records. PIs should also keep personal records of their PhD students’ expenses, if allocated a bench fee. This will help to link expenses to each individual student in order to carry forward the outstanding balance at finance year-end to future years (for continuing students).

***1.1.4 Publicity***

Please arrange a brief meeting with your Research Engagement Officer (REO). They will discuss your new research grant award with you with a view to publicising the project in our Faculty newsletter and other promotional materials, such as the University’s, Research Forum, or the @hls\_research Twitter feed. If you are a co-investigator on a grant that has been awarded jointly to Brookes and another institution, or another institution is the lead organisation, make sure that your REO is aware of this so that we do not make any unintentional or misleading claims.

***1.1.5 Converis***

Converis is the University’s Current Research Information System (CRIS), which can be used to store and manage details of research undertaken at Oxford Brookes.

For links to the Converis login, presentations and an introductory training video, see below:

<http://www.brookes.ac.uk/cris>

At the point where the grant is submitted, it will be logged in Converis under Project Applications.

When the grant is awarded, details can be viewed under Projects. All application and award documentation can be found in the Documents tab of the Projects screen, including the contract.

Once the contract has been signed and the activity code has been set up, Converis will send out an automated message to the Brookes PI confirming the activity code. The activity code will also be permanently logged on the Key Information tab of the Projects screen. (The last four digits of the activity code will always be the pFACT ID number).

The pFACT number from the application costing/approval is logged on the Key Information tab of the Projects screen (as pFACT ID). It is a searchable identifier to find the project in Converis. E.g. Projects – Filter – Project – ID\_PROJ – equals – 1234 (pFACT number) - Apply.

The Key Information tab of the Projects screen also contains a Financial Overview, which allows researchers to monitor proposed expenditure against actual expenditure. In the Financial Overview section the PI can view their award Budget (from the costing done in Pfact) against Expenditure (taken directly from e5, the University’s financial system) and instantly see the Remaining sub-totals.

You can use Converis to assign outputs to grants. Go to Project – select project title - Research Outputs – Publications – press the “+” button – search for the title of your publication and add it to your project.

RBDO will list the names of the institutions that you collaborate with on your research project in Converis (using the information provided in your application). The Library adds the names of the institutions of your collaborative authors to Converis.

The University’s Impact Tracker tool, which is used to record evidence and information about the impact arising from your work, links to projects/outputs in Converis.

# 1.2 The Principal Investigator’s overall role in managing grants

As principal investigator (PI) you have overall responsibility for managing the scientific programme of work and completing reports and output data collection as required by the funding body. In addition, you have responsibility for liaison with any collaborators and the line management of any research assistants appointed to work on the programme of research. The PI is responsible for all aspects of the grant/project and should liaise closely with Faculty and University Finance to ensure that monitoring is accurate and that financial reports are submitted to sponsors in a timely manner.

***1.2.1 Outcomes, reporting and open access***

Please carefully read the terms and conditions of your grant and ensure that you comply with them. Some funding bodies have specific output requirements on e.g. open access, funder approving the output prior to publication, etc., so you should familiarise yourself with these from the project outset.

***Open access***

As PI you should ensure you are aware of the funder’s and the University’s Open Access policies.

University Position on Open Access:

<https://www2.brookes.ac.uk/research-support/open_access>

You should also familiarise yourself with the University procedures for making outputs Open Access.

The Higher Education Funding Council for England has said that journal articles and conference proceedings with an ISSN accepted for publication after April 1st 2016 that are submitted to REF 2021 must ​meet specific Open Access requirements. For more information on this visit the link below. Queries should be directed to the Scholarly Communications Team, based in the Library (Contacts, section 1.9):

<http://www.brookes.ac.uk/library/research/open-access-publishing-and-research/>

***ResearchFish***

Outcomes for all Research Council and some charity grants should be reported during the open submission period to ResearchFish. RCUK will contact you with details of what is needed and when this is required by.

The terms of these grants require you to interact with the system to log all the latest outcomes for each of your projects since you last reported them on ResearchFish. Even if outcomes are not yet known at this stage (for instance, the project has only just started), or you have nothing new to add, you must log this on ResearchFish.

It is very important to engage with ResearchFish when the system instructs you to do so. RCUK have threatened sanctions if outcomes are not uploaded to the system. These are: i) academic may be refused ability to make further application or ii) funding may be withheld.

***Changes to the project***

It is essential that you discuss any changes to the project with your awarding body over the course of the grant. In many cases, permission to change start or end dates will be required from the funder. Any changes to the start and end dates of the project should be reported to the RGO, along with a copy of your correspondence with the funder, so that this can be updated in Converis (via the Post Awards Officer).

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# 1.3 The Principal Investigator as manager

The PI has overall responsibility for the project including managing the programme of work and completing reports and outputs to the funding body as required. S/he also has responsibility for liaising with any collaborators and ensuring that they submit their financial and scientific reports back to the PI’s organisation, if it is the Lead.

As PI on your research grant or grants, you will be the line manager of any staff appointed to work on your grant(s). You should thus ensure you attend the following mandatory courses (contact Roy Grant – see section 1.9 or see the Oxford Centre for Staff and Learning Development [OCSLD] website below for details), as soon as is practicable:

* **Recruitment & Selection** (so you can actively contribute to the appointment of your staff; otherwise you can only be an observer on an interview panel)

<http://www.brookes.ac.uk/OCSLD/Courses/Mandatory/Recruitment-and-selection/>

* **PDR Reviewer** (so you can conduct annual PDRs with your staff)  
  <https://www.brookes.ac.uk/ocsld/courses/mandatory/performance-and-development-review/>

There are other short courses run by OCSLD which you can attend to support your role as Line Manager as part of the OCSLD **Leadership and Management** programme.

* Includes: Leadership & Management, Coaching, Team Development, Managing Attendance, Effective Performance, Time Management, etc:

<http://www.brookes.ac.uk/OCSLD/Courses/Leadership-and-management/>

The University also runs a compulsory **Research Methods and Management** Training programme for its academic and research staff to include research induction and networking events, applying for research funding and what to do post-award:

<http://www.brookes.ac.uk/research/research-support/training-events/>

ICH-GCP (International Conference on Harmonisation-**Good Clinical Practice**) is an international ethical and scientific quality standard for designing, conducting, recording and reporting of research that involves human participants, which is written into UK law. It consists of systems and regulations to ensure good practice at all stages of the research process and enables transparency through documentation. Dr Johnny Collett runs training on Good Clinical Practice 3 to 4 times a year which is open to all Faculty researchers. GCP training is only required for researchers who do not have up-to-date GCP training or experience and who are carrying out research on humans. To register your interest in attending GCP training at OBU please get in touch with Johnny (see Contacts – section 1.9).

You are responsible for recruiting, appointing and then line managing research assistants on your grants unless this is formally delegated to another person (for example, in our Research Centres, some contract research staff may be line managed by the Centre Manager). Further details of recruitment are given in section 1.4.

***1.3.1 Office and Lab Space***

It is your responsibility as PI and Line Manager to consider where your new researcher is going to work in advance of their arrival (**ideally 2-3 months before**) – office/desk space and lab space as appropriate. You must therefore make sure Karen Brockington, Facilities and Services Manager, (see Contacts - section 1.9) is aware of any new appointments and any requirements for office space as soon as possible. All desk allocations are logged centrally with the University and it is therefore essential that staff allocations are formally requested and changes recorded. You should similarly consult your departmental Research Lead as soon as possible if laboratory or other specialist facilities are required. If there is no obvious solution (e.g. a replacement post), speak to your Research Lead in the first instance as they will have a broader view of space in the Department and will be able to help.

The Faculty supports the provision of a piece of IT equipment per member of staff which is replaced on, roughly, a 5 year rolling cycle. Karen Brockington, Faculty Head of Operations (see Contacts – 1.9) is the contact for the provision of IT equipment. Requests for office equipment should be directed to Lorraine Dyson.

***1.3.2 Athena Swan***

The University has been awarded Athena Swan Bronze recognition and the Faculty holds an Athena Swan Silver award. The Faculty has a series of web pages dedicated to tackling gender inequality:

<http://www.hls.brookes.ac.uk/women-in-stemm/athena-swan>

<http://www.hls.brookes.ac.uk/women-in-stemm/useful-links>

As PI you need to be aware of issues which can affect your staff such as flexible working, maternity/paternity leave and equality, diversity and inclusion:

<http://www.brookes.ac.uk/services/hr/handbook/index.html>

# <https://www.brookes.ac.uk/staff/human-resources/equality-diversity-and-inclusion/>

# 1.4 Recruitment and selection of research assistants

All forms and guidance notes relevant to the recruitment process can be found at the HR web site:

<http://www.brookes.ac.uk/services/hr/handbook/recruitment/index.html>

## 1.4.1 The Finance Activity Code

As soon as RBDO receive official notification that you have been awarded a grant, University Finance will set up an account activity code for your grant that all expenditure will be set against. This code must be used for all expenditure on your grant, including staff salaries. The activity code is always used in conjunction with a Cost Centre code, which for most PIs will be their Departmental Cost Code or their Research Centre Cost Code, where one has been issued.

If you have been awarded internal funding for the specific purposes of appointing fixed-term research staff (e.g. University Research Excellence awards), always use the individual activity code you have been allocated for this award.

If you are using funds that have been given as a charitable donation, the University Fundraising Team based in External Relations, will assign a finance code to be used. The contact for this is Martha Cass, Development Manager (see Contacts - section 1.9).

**If you are appointing Research Assistants, you must start the recruitment and selection process as soon as possible because it can take up to 3 months to appoint a person.**  In some instances, where a delay to the appointment of staff may be detrimental to the project (e.g. a project working with children that must start to coincide with the school year), it might be possible to issue a temporary finance code to initiate the recruitment process whilst the project-specific code is being issued. Such decisions are made jointly by the Faculty Head of Finance and AD RKE and are based on individual circumstances.

Always carefully check your awarding documentation to see what has been awarded and what staff appointments you can make (grade, time period, etc). If in any doubt, please check directly with the funder or discuss with RBDO (Post-award Processes Officer – see Contacts, 1.9).

***1.4.2 Job Descriptions/Person Specs***

To ensure that JDs do not have to go through the HR grading process every time, you can request a standard set of Research Assistant/Research Fellow job descriptions from HR. These can simply be tailored to your requirements with minimal changes to the JD. If you require a bespoke Research Assistant JD, it will have to go through the HR grading panel, which can take 4-6 weeks so you are strongly encouraged to adapt an existing role profile.

As a guide to which post you need, the HR web site provides generic role profiles for Postgraduate Research Assistant (grade 6), Post-doctoral Research Assistant (grade 7/8), Research Fellow (grade 8/9) and Senior Research Fellow (grade 10):

<http://www.brookes.ac.uk/services/hr/reward/academic/index.html>

If you require a bespoke JD, please follow the guidelines and proformas for Job Descriptions and Person Specifications on the HR web site:

<http://www.brookes.ac.uk/services/hr/handbook/recruitment/forms_and_documentation/index.html>

If you have any queries on shaping the Job Description/Person Spec, please consult the HR advisors in our Faculty (see 1.9, Contacts).

If writing a new Person Specification, remember that you cannot appoint a person who does not meet the essential criteria (so choose carefully between essential and desirable).

To ascertain the grade of a new post it will need to go through role analysis and grading review, which takes place in HR once a month.

***1.4.3 Using the CORE HR system - Raising a Staff Request:***

**Post numbers:**

You need to know the post number before you can raise a staff request. You can request access to the post number spreadsheet from HR. It is important to only use the post numbers in the HLS tab (codes for the other Faculties won’t work!) Please be aware that there are discrete post numbers for researchers depending on whether they are on regular, variable or casual contracts, so it is important to use the post numbers under the correct headings. Post numbers will also differ depending on the grade of the same post. If the post number for a researcher on a particular grade/on a particular type of contract is not present in the spreadsheet, HR can create one - phone ext. 8194/8195.

**Authority to enter a member of staff on CORE:**

If you are unable to successfully use the relevant post numbers to enter a member of staff on the CORE HR system, it could be that you need to be set up with access rights. Please contact Karen Brockington, Faculty Head of Operations, to be added to the list of approved users.

**Raising a Staff Request – Demonstrations and manuals:**

<https://sites.google.com/a/brookes.ac.uk/hr-and-payroll-system/training/raising-a-staff-request>

**CORE:**

Launch CORE in Google Chrome:

<https://my.corehr.com/pls/coreportal_obup/cp_por_public_main_page.display_login_page>

Go to Quick Jump

– dropdown to Staff Requests

– click Staff Request button

– click CREATE NEW STAFF REQUEST button

- click funnel icon

- only enter Post Number on this screen and click Search

- click “**…**” and select Create Request From Post

Before starting you need to have all the following information to hand as **you can only save once these mandatory fields have been completed**:

• **Screen 1** - Position: All hierarchy fields, including sub-department. (Note: you must select N/A for each sub-department if no sub-dept is relevant, to be able to successfully save your staff request); Location

• **Screen 2** – Contract Details: Pay Scale, Salary Scale Point or Grade for Casuals, FTE, Line Manager

• **Screen 3** – Job Details: Application form (type of contract – select: “1. Academic, Research and Senior Staff App Form”), Short job title, Long job title, Where to advertise and how long for?

• **Screen 4** – Vacancy Details: Vacancy Type (Research), Position Type (full-time/part-time fixed term/permanent researcher)

• **Screen 5** - You can upload one document and then proceed to the end and save your request.  You can then go back to this screen and upload other documents as needed as per instructions in the manual. You must attach the Job Description and Person Spec.

• **Screen 6** - Cost Allocation: Cost centre, Project code, Date from, Date to and percentage to be funded by this code.

• **Screen 7** – Summary: Once the above screens are completed you can press “save” and this will generate a unique request number, which you should note for all future correspondence with HR. Press “submit” only when all supporting documentation has been uploaded.

All interview panel members should be listed on Screen 3: Job Details, so that they can be given access to view the applications.

You can enter the advert details on Screen 4: Vacancy Details.

The Executive Office Administrator to the Associate Dean – Research & Knowledge Exchange, (see Contacts – 1.9) can provide support for using CORE to raise a staff request for contract researchers.

***Faculty approvals***

Once the Staff Request is submitted, it is circulated electronically by CORE for approvals in this order:

Research staff request

Head of Department

Finance – Head of Finance/Yong Han

HLS Research Approver – Prof. David Evans

HR

Once the final approval is given in CORE, HR will post the advert according to the timetable you provide in the Staff Request.

***1.4.4 Advertising:***

All posts are advertised on:

▪ OBU job vacancies website <http://www.brookes.ac.uk/job-vacancies/>

▪ Jobs.ac.uk

▪ Indeed

▪ Universal Job Match (government job search site)

It is not normally necessary to advertise research posts anywhere other than the above web sites. Advertising locally in the Oxford Times is very expensive (around £1,000) and a cost code for such an advert must be agreed with Faculty Finance. Please be aware that financial codes may differ for adverts and salary costs, depending on the terms and conditions set by the funder.

Where appropriate you are free to circulate the advert and further details to colleagues elsewhere (but all applications must be made through the official channels, using the HR CORE system).

If there is any possibility that the post could be held by a person who needs a certificate of sponsorship then it must be advertised for 5 weeks, as stipulated by UKVI, otherwise the minimum advertising period is 2 weeks.

***1.4.5 Short-listing and Interview arrangements***

Anyone who has not completed the Recruitment & Selection course run by OCSLD (or the refresher course to be taken every three years) cannot take an active part in the interview panel – they can only observe.

All interview panel members, as specified in CORE, should be e-mailed by HR (as Chair you should check with panel members whether they have been notified) when the vacancy has closed and applications are available to view. Applications can be found in:

Staff HR Portal > My Interviews > Interview Panel.

Under the relevant vacancy, select:

Actions > Vacancy Details > Documents.

All short-listing forms can be found on the HR web site:

<http://www.brookes.ac.uk/services/hr/handbook/recruitment/forms_and_documentation/index.html>

In addition to the PI, it is suggested that at least one other person goes through the applications and short-lists against the essential and desirable criteria identified in Person Specification.

Only candidates who meet all the essential criteria can be selected for interview. If any candidate has indicated to HR that they have a disability and they meet all essential criteria, you **must** invite them to interview.

You should email the agreed shortlisting documents to hrteam-operations@brookes.ac.uk:

“Interview Information” summary (also known as the Shortlisting Front Sheet)

“Shortlisting Form: Essential Criteria”

“Shortlisting Form: Desirable Criteria”

By completing the “Interview Information” form you are confirming the names of the selected interview candidates, date of interview, room, nature of the selection process (interview/skills test/presentation/tour of facilities/meet research group informally) and the times each candidate is required to attend. Take into account where candidates are travelling from. We only reimburse for travel within the UK at the most economical rates. HR will use this information to invite candidates to interview.

The “Interview Information” form also includes details of the interview panel. The PI will normally chair the interview panel although a RL or HoD could be invited to do this if preferred. You normally need 3 people on the interview panel, including the Chair. It is good practice for panels to include staff of mixed gender.

If you have never interviewed before, please include the Research Lead/or HoD/or AD RKE (in that order!) Arrange for the candidates to be shown around by someone from your research group/cluster (and have time to meet your research team informally, if appropriate).

Overseas candidates should normally be interviewed through a video conferencing facility (HR has a facility that can booked in the Gibbs Building) or via Skype.

Short-list 4-6 people ideally. If there is no-one to interview, discuss next steps with Research Lead/HoD/AD RKE.

Ensure that you book a room and check that everyone is available on the day shown. The Departmental Executive Office Administrators should be informed of when interview candidates will be arriving.

You should allow a minimum of 2 weeks between the shortlist being returned to HR and the interview date, to allow sufficient time for HR to contact candidates and for them to confirm their attendance, and for HR to secure references. HR will make the chair pack available to all interview panel members in CORE one week before the interview.

***The interview and appointment of staff***

Eligibility Cover Sheet:

It is essential that someone is designated to verify that they have seen the originals and takes photocopies of passport/work permit/visa documents and is responsible for completing the “Eligibility cover sheet”, as HR must have this information to make an appointment (applies to everyone). Often the Departmental Executive Office Administrator will do this for you if you ask in advance.

Let candidates know when you will contact them with a decision and try to stick to this. Ensure you have a preferred contact number for candidates at the end of the interview. Complete the paperwork fully at the end of the interview – the “Appointment Panel Report” (for the successful candidate) and “Interview Assessment form” for each candidate (the individual forms are used by HR to provide feedback to unsuccessful candidates if requested).

The Chair should then phone/contact the successful candidate and confirm the appointment (subject to satisfactory references) and agree a start date/starting salary.

The Chair should then complete the “Appointment Panel Report” form in full, and return to HR as soon as possible after interview so that a contract can be issued. Please remember that you can only normally appoint to the bottom of a scale – if you decide to appoint further up (and have funds to do so) a full justification must be provided. The justification must refer to the candidate’s prior experience for the role and must NOT refer to their previous salary as this in itself is not justification for being appointed higher up the scale.

The Chair is responsible for sending **all** the paperwork back to HR and should contact the unsuccessful candidates (as a courtesy). Appointment Panel Report, Interview Assessment Form and Eligibility Cover Sheet available on HR web site:

<http://www2.brookes.ac.uk/services/hr/handbook/forms/index.html>

Finally, the PI should inform the Research Manager of the name, job title and start date of the successful candidate, to update our Faculty research staff database so that a Faculty Research Induction can be arranged.

## 1.4.6 Named Researcher

Where a case has been made in an external funding application for a named researcher, and the individual’s appointment is agreed by the funder, the post exceptionally does not need to be advertised.

The Line Manager will need to complete a Staff Request in CORE (see 1.4.3 above), highlighting that no advert is required and naming the researcher.

Alongside the Staff Request, the following should be submitted to HR:

- Job Description/Person Spec

- Appointment Panel Report

- Eligibility Cover sheet

- Copy of eligibility documentation (usually passport - front cover, personal details page and any page with work permits/visas on it)

- Evidence of named researcher status (covering memo and copy of relevant page from the grant application making the argument for the named researcher)

- Personal Details form

HR need these details to be assured that we can appoint a member of staff without going through the normal recruitment process (this is a legal obligation in line with Equal Opportunities and Diversity legislation).

***1.4.7 Replacing an existing researcher***

If an existing researcher resigns and is being replaced, a Staff Request needs to be entered in CORE (see 1.4.3 above), using the same post number and stating when current post holder is leaving/the new post begins, so that this can be advertised accordingly.

***1.4.8 Casual and Variable posts***

Staff Requests can be raised for the appointment of both casual and variable posts in CORE. (See section 1.4.3 above on Post Numbers and raising a Staff Request).

**Variable posts:**

Alongside the staff request, the Line Manager will need to send HR the hourly paid researcher’s:

- Personal details form

- Eligibility Cover Sheet

- Proof of their eligibility to work in the UK (usually passport – front cover, personal details form and any page with work permits/visas on it). If the hourly-paid researcher is a Tier 4 international student we must also have a copy of their semester/vacation timetable.

This will provide HR with the information they need to issue the contract.

The approvals process in CORE follows this order for variable contracts:

Head of Department

Finance – Head of Finance/Yong Han

HR

**Casual posts:**

Alongside the staff request, the Line Manager will need to send HR the hourly paid researcher’s:

- Eligibility Cover Sheet

- Proof of their eligibility to work in the UK (usually passport – front cover, personal details form and any page with work permits/visas on it). If the hourly-paid researcher is a Tier 4 international student we must also have a copy of their semester/vacation timetable.

The person who raised the staff request needs to inform the casual researcher of the vacancy number and their individual staff request number, generated in CORE as above. The casual researcher will need this information to complete the appropriate fields of the electronic personal details form.

The casual researcher then needs to go to the vacancies web page, search for the vacancy number and submit their personal details online directly to HR.

Once personal details are submitted, HR will match the staff request with the casual researcher and process the contract.

The approvals process in CORE follows this order for casual contracts:

Casual approver – Karen Brockington

Finance – Head of Finance/Yong Han

HR

## Appointment of very short term ‘Casual’ research assistants

We can only employ a casual researcher (unless they are an OBU student) for 12 weeks then they must have a gap of 6 weeks.

If employing an international [non-EU] student you must check to see if they have any other contracts of employment with the University, including those in a different Directorate or Faculty. No more than 20 hours per week can be worked by any international student during semester time and this includes any combination of hourly-paid contracts. Recruiting managers have a responsibility for checking this.

An agreed hourly rate of pay (that corresponds to one of the Research Assistant grades) must be agreed and you must identify a person to be appointed and ensure they understand the nature of the post, the hourly rate, the hours to be worked and the timesheet process. You need to satisfy yourself that the person can complete the programme of work within the allocated time.

Claim forms:

As PI, you will be responsible for signing off weekly/monthly timesheets to go to HR. Casual and variable claim forms are available on the HR web site:

<https://www.brookes.ac.uk/services/hr/handbook/short_term_temp_contracts/index.html>

Casual staff are paid at the end of each month. The account code must be specified and the claim form must be authorised by the PI/HoD/Centre Manager (acting on behalf of the budget holder), then sent to the AD RKE for Faculty authorisation. The deadlines for timesheets to be received by HR is the 6th of the month, to be paid at the end of that month. Sufficient time should be allowed for the authorisation process.

If you have funding for more than 12 weeks it is better to go for a short-term contract (see above) or use a variable hours contract (see below).

## Variable hours contracts for research staff

This operates in a similar way to a casual contracts (see above), in regards to appointment and use of weekly timesheets, but you can appoint a member of staff on an annual contract where the hours to be worked each month vary and are recorded on timesheets, which are signed off monthly by the PI. This is useful for contract research or similar activity where the number of hours may vary according to the work coming in.

Variable hours contracts - Guidance for managers:

<https://www.brookes.ac.uk/services/hr/handbook/short_term_temp_contracts/variable_hours_managers.html>

# 1.5 Induction of new staff

After appointment HR will set up a p number and generate a staff card. All Faculty staff cards are sent via the Faculty Administrator, Sharon Prior. The Faculty Administrator will carry out a general Faculty Induction covering sickness/absence policy, annual leave card, staff card, etc.

In addition the Research Manager will carry out a Faculty Research Induction for all new research staff, to introduce Faculty research procedures and highlight key contacts, support, training and career development opportunities.

As PI, you are also responsible for part of the induction process and you should carry out an induction which must at a minimum cover Health and Safety, office space, keys, swipe card access and the end of probationary period report. In particular, it is your responsibility to ensure that ***staff have an initial PDR within two weeks*** of taking up the post, to set objectives for the year and agree any development/mentoring activities. There is no set form for initial PDR; the last page of the academic PDR form can be used for this purpose, to agree forward-facing objectives and initial training and development opportunities:

<http://www.brookes.ac.uk/services/hr/pdr/index.html>

***1.5.1 Health & safety, risk assessment and overseas travel***

During induction you should carry out a detailed Health and Safety induction for your researcher's individual needs, covering the research environment, (including lab safety, where relevant) and risk assessment.

Consider appointing a current researcher to act as mentor for the first few weeks to help the new researcher settle in more quickly; this could be in your own research group or a wider grouping.

For all Health and Safety enquiries relating to research, contact Liz Mitchell/Dr Sarah Irons in the first instance (see Contacts, section 1.9).

Faculty Health and Safety Induction document for laboratory work:

[https://sites.google.com/brookes.ac.uk/fhls-health-and-safety/fhls-hs-overview/faculty-hs-induction](https://sites.google.com/brookes.ac.uk/fhls-health-and-safety/fhls-hs-overview/faculty-hs-inductions)s

University Health and Safety manual:

<http://www.brookes.ac.uk/services/hr/health_safety/docs/index.html>

Faculty Health and Safety policy:

Faculty intranet – Google site – Staff – login (p number and password) <https://sites.google.com/brookes.ac.uk/fhls-health-and-safety/fhls-hs-overview/fhls-policy-document>

Risk Assessment and Staff Research Activity:

(*for completion by research staff undertaking research activities in places which are not under University control both in the UK and overseas*)

Faculty intranet – Document store – Staff – login (p number and password) – scroll to pg 2 – Health and Safety folder - “Risk Assessment & Staff Research Activity Oct 12”:

<https://shsc-int.brookes.ac.uk/documents/view.php?fDocumentId=5669>

Staff Overseas Travel Proposal form:

(*for completion by staff who wish to travel overseas*)

Faculty intranet – Document store – Staff – login (p number and password) –pg 1 – Maps and Travel folder – “Staff Overseas Travel Authorisation Form 2013”:

<https://shsc-int.brookes.ac.uk/documents/view.php?fDocumentId=5921>

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# 1.6 On-going management

You must conduct an annual PDR and ensure your researchers have access to appropriate staff development and career development opportunities:

<http://www.brookes.ac.uk/services/hr/pdr/index.html>

The grant may include funds for conference attendance, which you can authorise at your discretion (Faculty overseas travel forms must be completed by all research staff). Researchers can also apply for Departmental Staff Development funds:

Staff Development Strategy and application forms on Faculty Document Store – Staff login at: <https://shsc-int.brookes.ac.uk/documents/login.php>

Scroll to menu pg 2 - Staff Development folder

You must authorise and keep records of holiday and other leave using Faculty forms. Absences must be reported to the Faculty Administrator. The HR website outlines details of leave entitlement. See Annual Leave, Bank Holidays and Calculating annual leave, bank holidays and concessionary days for staff working part time hours or compressed hours at:

<http://www.brookes.ac.uk/services/hr/handbook/index.html>

We recommend you have regular 1-1 meetings with your research staff and these discussions should include support for helping them develop their careers (see 1.7). If there are any difficulties or you require advice, please speak to the RM, your Research Lead, HoD or the AD RKE. If necessary, we can seek further advice from our link HR team.

***1.6.1 TRAC***

When requested each year by the TRAC/WLP team, please respond to email requests to state the name of your researchers and which grants they are funded by. When grants start we often don’t know who has been appointed and at a later point have to match up staff names with funded grant codes. If we don’t do this we run the risk of researcher time being counted as unfunded – and this drives up our Faculty overhead rates – which is not desirable for any reason. Your help with this matter is much appreciated.

# 1.7 Career Development of Contract Research Staff

An important part of your role as PI on your grant is to help develop the career of your Research Assistant/Fellow. Obviously a large part of this will be developing them as researchers and gaining research-related skills in the lab, the field or as appropriate. You should also encourage them to develop their writing and presentation skills (informally as well as formally) and to take part in the research culture of the Department – attending seminars and events within OBU and locally.

Those who are interested can also get experience of demonstrating, tutorials and field work – particularly important if they are considering future academic careers.

***Outreach activities***

The Faculty has a wide ranging and active outreach programme, including school visits and the Brookes Science Bazaar, led by Dr Anne Osterrieder. All researchers are encouraged to become involved in these Public Engagement activities; these are all things which can strengthen their CV for future appointments. Researchers should be encouraged to contact Anne to get involved (see contacts, section 1.9). Some Research Councils, such as the BBSRC, require that outreach activities are undertaken as part of their grant conditions.

Soapbox Science:

Soapbox Science is a novel public outreach platform for promoting women scientists and the science they do. The events transform public areas into an arena for public learning and scientific debate. To get involved with Soapbox Science, contact Dr Ravinder Kanda, e-mail rkanda@brookes.ac.uk, ext 4023. For further details visit:

<http://soapboxscience.org/>

***University Research Mentoring Scheme***

The University runs a Mentoring Scheme. All researchers are eligible to join the scheme and should be encouraged to take part in it. Mentees and Mentors are matched as closely as possible on the basis of what the Mentee wants to get out of the scheme. Mentees benefit through tapping knowledge and guidance from more experienced researchers, having a ‘neutral’ person to act as a sounding board, and exploring their career development options. The scheme is run by Prof. Susan Brooks in her role as University-wide Director of Researcher Development. For an application form and further information, visit:

<https://www2.brookes.ac.uk/research-support/mentoring>

***Careers Centre***

The Careers Centre offers advice and resources for contract research staff. Details of training events, workshops and guidance offered by the University Careers Centre, including same day appointments, can be found at the Careers Centre web site. The link to “Resources” from the Careers homepage also provides assistance on CV building, cover letters and interviews:

<http://www.brookes.ac.uk/careers>

***Career and Personal Development***

OCSLD host a comprehensive Career and Personal Development web site which provides online tools and links to training courses through three portals: 1) i-GROW, 2) AUA professional behaviours framework & 3) Role-related skills:

<https://www.brookes.ac.uk/OCSLD/Your-development/Career-development/>

***Vitae***

Vitae is dedicated to realising the potential of researchers through transforming their professional and career development:

<https://www.vitae.ac.uk/doing-research/research-staff>

***Researcher Development Framework***

The Researcher Development Framework is a career development resource available on the Vitae web site for researchers to look at their knowledge, behaviours and attitudes:

<https://www.vitae.ac.uk/researchers-professional-development/about-the-vitae-researcher-development-framework/developing-the-vitae-researcher-development-framework>

***The Concordat to Support the Career Development of Researchers***

<https://www.vitae.ac.uk/policy/concordat-to-support-the-career-development-of-researchers>

<https://www.vitae.ac.uk/policy/vitae-concordat-vitae-2011.pdf>

***University Code of Practice for the Career Management and Development of Researchers***

<http://www.brookes.ac.uk/research/policies-and-codes-of-practice/>

# 1.8 End of contract/Extension of contract

Three months before the end of a contract CORE sends out an automated e-mail to the Line Manager. The e-mail contains a link to the HR Forms webpage where the contract extension form (entitled ‘Notification of Expiry of Fixed Term Contract’) is held, as per link below:

<http://www2.brookes.ac.uk/services/hr/handbook/forms/index.html>

It is important that contract extension forms are dealt with promptly. When the contract end date is approaching OBIS will send automated e-mails to warn the researcher that they will be losing their OBU e-mail account as their OBU contract is approaching an end. This can be quite distressing for the Researcher to receive if the actual plan is to renew their contract.

If there is a delay in being able to make a decision about a contract for any reason, please ensure that both the Research Assistant and HR are kept informed. It is important that you make sure the staff member concerned is aware of what arrangements are being put in place for them.

It is the Line Manager’s responsibility to discuss options with the Research Assistant and decide on what possibilities exist for continued employment. The main options are usually:

* A **new source of funding has been identified** and the member of staff is transferred to a new grant. The contract extension form needs to be completed to indicate that the contract will be continued. This form needs to detail the revised end date, new financial code(s) and must be signed off by Head of Faculty Finance and HoD/AD-RKE. The form should then be returned to HR. The extension period does not currently need to be entered on CORE.

If the Research Assistant’s role on the new grant will change significantly an updated Job Description (JD) should be attached to the contract extension form for approval by HR. This must be done if the Research Assistant is changing grades e.g. they are currently on a grade 7 and the new contract is for grade 8. The HR Adviser/HR Manager will be able to advise if it is a re-grade and will then issue a letter with the new grade.

* **Grants have been applied for but the outcome is not yet known**. The PI can apply for Bridging funds from the University CRF and/or Faculty QR funds. These funds will normally provide between 1 and 6 months additional salary costs. It is important to speak to the AD RKE as soon as possible and no later than the 3 months before the contract end date. We only have limited amounts of Bridging Funds in any year.

If Bridging funds are secured then the contract extension form must detail the revised end date, new financial code and must be signed off by Head of Faculty Finance and HoD/AD-RKE. The form should then be returned to HR. The extension period does not currently need to be entered on CORE.

* There are **no new funds**. If the contract is not being extended, the Line Manager should ensure that the Researcher is aware. The date the contract will cease should be noted on the notification of expiry of contract form. This needs to be signed off by HoD/AD-RKE and returned to HR without delay.

***1.8.1 Redeployment***

If the researcher has 6 months continuous service (full eligibility criteria can be found at link below) and would like to continue employment at OBU, they should be encouraged to opt in to **redeployment**, where relevant and appropriate. Redeployment is a process that allows eligible staff to apply for appropriate vacancies before they are released for external advertising. The researcher will need to complete a cover sheet and send this to HR, along with their current CV, in order to join the redeployment list. Further details of redeployment, including eligibility and a copy of the cover sheet can be found at the following link:

<http://www.brookes.ac.uk/services/hr/handbook/recruitment/related_policies_procedures/redeployment/index.html>

If the researcher in redeployment is sent a position of interest, they do not need to fill out a job application form. They can arrange an informal chat with the Line Manager, then if they are happy to proceed with the post they will be invited to a formal interview.

* For exceptional PDRAs, there may be the opportunity to **apply for Research Fellowships** – internally or externally funded, as the first stage of an independent research career. Please talk to the Research Grants Officer or your Research Lead or AD RKE for possibilities at the earliest opportunity. We have had a number of PDRAs gain externally or internally funded Fellowships in the last few years.

***For staff who are leaving***

Please ensure that you agree any annual leave to be taken and that the following are returned to you on the researcher’s last working day:

- Access swipe card

- Keys

- Staff/library card

Also consider data management and storage to ensure key documents/materials are not lost at this point. It is the PI’s (and the University’s) responsibility to ensure that data are stored and comply with the funder’s and the University’s data management policy.

University Research Data Management Policy:

<http://www.brookes.ac.uk/research/policies-and-codes-of-practice/>

Staff leaving the University should also be encouraged to complete the “Leavers’ questionnaire”, available on the HR web site (at link below), which provides an opportunity to arrange a formal exit interview. The form should be returned to the Link HR Team (e-mail hrteam-er@brookes.ac.uk):

<http://www2.brookes.ac.uk/services/hr/handbook/forms/index.html>

# 1.9 Contacts

***Faculty Research Management:***

Associate Dean (Research and Knowledge Exchange):

**Prof. David Evans**, [deevans@brookes.ac.uk](mailto:deevans@brookes.ac.uk) ext. 3968

***Research Leads:***

Department of Biological & Medical Sciences:

**Prof. Alistair McGregor**, e-mail [amcgregor@brookes.ac.uk](mailto:amcgregor@brookes.ac.uk), ext. 4191

Department of Nursing & Midwifery:

**Dr Helen Walthall**, e-mail [hewalthall@brookes.ac.uk](mailto:hewalthall@brookes.ac.uk), ext. 2603

**Professor Jane Appleton**, e-mail [jvappleton@brookes.ac.uk](mailto:jvappleton@brookes.ac.uk), ext 2606

Department of Psychology, Health & Professional Development:

**Dr Mark Burgess,** e-mail: [mark.burgess@brookes.ac.uk](mailto:mark.burgess@brookes.ac.uk)

**Professor David Foxcroft,** e-mail: [david.foxcroft@brookes.ac.uk](mailto:david.foxcroft@brookes.ac.uk), ext 5283

Department of Sports, Health Sciences & Social Work:

**Dr Johnny Collett**, [jcollett@brookes.ac.uk](mailto:jcollett@brookes.ac.uk) ext. 3293

***Faculty Research Office:***

Research Administrator:

**Abigayle Langford**, [alangford@brookes.ac.uk](mailto:alangford@brookes.ac.uk) ext. 2904

Research Engagement Officer:

**Rebecca Jones** (Tues, Weds, Thurs, Fri), [rebeccajones@brookes.ac.uk](mailto:rebeccajones@brookes.ac.uk), ext. 2890

Research Grants Officer:

**Dr Tudor Georgescu**, [tgeorgescu@brookes.ac.uk](mailto:tgeorgescu@brookes.ac.uk), ext. 2906

Research Managers (**Faculty Research Induction**):

**Lorraine Williams** (Weds am, Thurs, Fri), [ldwilliams@brookes.ac.uk](mailto:ldwilliams@brookes.ac.uk) ext. 2905

**Angela Robinson** (Mon, Tues, Weds), [ajrobinson@brookes.ac.uk](mailto:ajrobinson@brookes.ac.uk) ext. 2955

***Faculty Finance Support for Researchers:***

Programme Portfolio Manager

**Yong Han**, [yhan@brookes.ac.uk](mailto:yhan@brookes.ac.uk), ext. 2650

Business Support Officer

**Sympho Sakila**, [ssakila@brookes.ac.uk](mailto:ssakila@brookes.ac.uk), ext. 2575/2979

Research Finance Intern

**Bwalya Bwali**, [bbwali@brookes.ac.uk](mailto:bbwali@brookes.ac.uk) ext. 2571

***Other useful Faculty contacts:***

Executive Office Administrator to the Associate Dean – Research & Knowledge Exchange (using **CORE** to raise a staff request):

**Diane Chung**, [dchung@brookes.ac.uk](mailto:dchung@brookes.ac.uk), ext. 3296

Facilities and Services Manager (**office space**)

**Karen Brockington**, [klbrockington@brookes.ac.uk](mailto:klbrockington@brookes.ac.uk), ext 2644 (MR) & 4419 (GIP)

Faculty Administrator (**general Faculty induction**, central contact for all HLS staff cards)

**Sharon Prior**, [sprior@brookes.ac.uk](mailto:sprior@brookes.ac.uk), ext. 2569

Faculty Head of Operations (provision of **IT equipment** & **user rights** to enter a member of staff **on CORE**)

**Karen Brockington**, [klbrockington@brookes.ac.uk](mailto:klbrockington@brookes.ac.uk), ext. 2568/2783

For all **Health & Safety** queries relating to research, contact Liz Mitchell and Sarah Irons in the first instance:

**Liz Mitchell**, [ejfmitchell@brookes.ac.uk](mailto:ejfmitchell@brookes.ac.uk), ext. 3262

**Dr Sarah Irons**, [sarahirons@brookes.ac.uk](mailto:sarahirons@brookes.ac.uk), ext. 4171

Senior Research Fellow (**Good Clinical Practice training**)

**Dr Johnny Collett**, [jcollett@brookes.ac.uk](mailto:jcollett@brookes.ac.uk), ext. 3630

Faculty Research **Ethics** Committee Chair

**Kellie Tune**, [kellie.tune@brookes.ac.uk](mailto:kellie.tune@brookes.ac.uk), ext. 5276

Senior Lecturer (with responsibility for **Public Engagement**/Research Communication)

**Dr Anne Osterrieder**, [a.osterrieder@brookes.ac.uk](mailto:a.osterrieder@brookes.ac.uk), ext. 3700

University Director of Researcher Development (**Training**)

**Prof. Susan Brooks**, [sbrooks@brookes.ac.uk](mailto:sbrooks@brookes.ac.uk), ext. 3285

***Faculty Link HR Team:***

HR Business Partner:

**Elaine Dagnall** [**edagnall@brookes.ac.uk**](mailto:edagnall@brookes.ac.uk), ext. 5695

HR Business Partner:

**Lana Holman**, [lholman@brookes.ac.uk](mailto:lholman@brookes.ac.uk), ext. 5704

Deals with: *Grading, job descriptions, grievance, disciplinary, capability issues*

Further HR contacts for the Faculty can be found at <https://www2.brookes.ac.uk/services/hr/hr_teams.html>

***Oxford Centre for Staff and Learning Development (OCSLD):***

Administrator (to book a place on internal OCSLD training/development courses)

**Roy Grant**, [rgrant@brookes.ac.uk](mailto:rgrant@brookes.ac.uk), ext. 5852

**Pro Vice-Chancellor - Research & Global Partnerships:**

**Prof. Linda King**, [laking@brookes.ac.uk](mailto:laking@brookes.ac.uk) (PA Fionna Callaghan, fcallaghan@brookes.ac.uk, ext. 4891)

***University Research & Business Development Office (RBDO):***

Post-award Processes Officer:

**Paul Carolan**, [pcarolan@brookes.ac.uk](mailto:pcarolan@brookes.ac.uk), ext. 4218

Please also refer to the **University Post-award handbook** for further guidance, which is broken down into five sections**:**

<https://www2.brookes.ac.uk/research-support/post-award/index_html>

1) Project Management

2) Finance

3) Recruitment and staff management

4) Research staff at Brookes

5) Funding body regulations

***University Fundraising Team – External Relations:***

Development Manager (charitable donations):

Martha Cass, [mcass@brookes.ac.uk](mailto:mcass@brookes.ac.uk), ext. 4878

***Scholarly Communications Team – Learning Resources/Library:***

For guidance on Open Access

[openaccess@brookes.ac.uk](mailto:openaccess@brookes.ac.uk)

Team led by:

Daniel Croft, [dcroft@brookes.ac.uk](mailto:dcroft@brookes.ac.uk), ext. 5085

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# *Last updated LW, 14th March 2019.*

# *Prof. Linda King and Jennie Cripps, Dec 2014.*

# APPENDIX A

Jackie Ryan, Faculty Finance, Summer 2017

**EXPENSES& EXPENSE CLAIM FORMS GUIDELINES**

These guidelines are designed to assist you in completing the revised University Expenses Claim Form, issued in August 2014. The University will be issuing comprehensive new guidelines in the near future. The new version of the form is available from the following link:

<http://fls.jamkit.com/hb/FormsDownloads>

This is the only version Central Finance will accept. Claims submitted on any other version will be returned and you will be expected to complete a copy of this form. Your replacement form will need to be authorised by the relevant signatory and sent along with receipts for all expenditure.

Key to new or changed fields:

1. Type of Expense - the version on the link has ‘drop-down’ boxes, giving you options for the type of expenditure. Complete these before you print off the form.
2. Description or Purpose of Journey - you should complete this field with where and when you went, and for what purpose e.g.: EC Funding Conference in Milan - March 2014, BBSRC progress meeting, London - June 2104 etc. Original receipts should then be provided for each claimed item, each one numbered to match column 1 (Receipt Ref) and Type of Expense.
3. Sub-total local currency - any expenditure in foreign currency should be totalled here. This should then be converted to £ sterling with a rate provided by Faculty Finance, who will direct you to the following link:

<http://www.xe.com/currencyconverter/>

You should print the page, showing the currency rate used, and include with your expenses claim form. The Finance Team will use the same link for any claims that have not been converted.

1. Element - this denotes if the expenses are to be charged to Oxford Brookes University (U element) or Oxford Brookes Enterprises (E element). Teaching or Research account codes are mainly U element, Consultancy account codes are mainly E element.
2. Claim checked for Accuracy - forms that have been signed by the claimant and authorised by the relevant signatory, should be sent to Faculty Finance for it to be checked for accuracy. A member of the Faculty Finance Team will check your claim and sign and date here if the claim is accurate.
3. Reason for Travel / Destination - you should include the reason you are claiming mileage e.g.: meeting with client, travel to station etc. A post code of start and destination points should be included.

Notes to Remember:

Where possible, conferences and meetings should be booked using the Universities nominated suppliers (by Purchase Order), Faculty Purchasing Cards or by Payment Request (mainly used for foreign currency payments).

Flights and accommodation should be booked through Key Travel. If you have sourced a cheaper flight, Key Travel must be given the opportunity to match it. If this is not possible, you should include correspondence stating this. Please contact Faculty Finance for details regarding booking with Key Travel.

Any expenses claim forms including flights will be queried, and you will be required to justify your reasons for booking flights without contacting Key Travel in the first instance.

Accommodation offered by a conference organiser at favourable delegate rates, should be booked at the same time as the conference.

Claims should be submitted to Faculty Executive Office Administrator or Faculty Administrator by end of the month. Completed forms should be sent to Faculty Finance by 5th of the month, to enable Faculty Finance staff to check claims before the Central Finance deadline of 10th of the month.

Some Useful Account Codes:

|  |  |  |
| --- | --- | --- |
| **E5 Account Code** | **Description** | **Old CEDAR Code** |
| 4640 | Conferences & Meetings | RXA |
| 4642 | Training Courses | RYA |
| 4654 | Travel - General | SNA,SBC |
| 4656 | Travel - Accommodation & Hotels | SBA |
| 4658 | Travel - Mileage (Private Vehicle) | SFA |
| 4662 | Travel - Rail | SGA |
| 4664 | Travel - Subsistence | SHA |
| 4666 | Travel - Taxi Hire | SEA |
| 4672 | Vehicle - Fuels & Lubricants | SSA |