Table of Contents

Introduction ................................................................................................................................. 4

GLOSSARY OF TERMS .................................................................................................................. 5

SECTION 1 – Civil Service Mobility .......................................................................................... 6
  1.1 Objective of Civil Service Mobility ...................................................................................... 6
  1.2 Agreed Guiding Principles for Mobility Policies in the Civil Service .................................. 6
  1.3 Phases of the Civil Service Mobility scheme ....................................................................... 7
  1.4 Internal Mobility Policy ....................................................................................................... 7

SECTION 2 - Phase 1A of the Civil Service Mobility Scheme .................................................... 8
  2.1 Participating Organisations and Grades .............................................................................. 8
  2.2 Organisations/Grades not included in the Scheme ............................................................. 8
      Civil Service Grades .............................................................................................................. 8
      Industrial Grades ................................................................................................................. 8
      Staff working on contract .................................................................................................. 8
      Public Service Bodies ......................................................................................................... 8
  2.3 Governance Structure ....................................................................................................... 8
      CSHR Division .................................................................................................................... 8
      Local HR ............................................................................................................................ 8
      HR Shared Services .......................................................................................................... 8
      Local HR – non-HRSS - Garda Civilians, An Garda Síochána, and Houses of the Oireachtas .... 8
      Local HR – non-HRMS - Irish Prison Service, Ombudsman for Children’s Office, National Council for Curriculum and Assessment ................................................................. 9
  2.4 Participating Staff Members .............................................................................................. 9
  2.5 Legacy Transfer Mechanisms ........................................................................................... 10
  2.6 Ranking of Waitlists ........................................................................................................ 10
  2.7 Mobility Zones ................................................................................................................ 10
  2.8 Irish Proficiency ............................................................................................................... 11
  2.9 Reasonable Accommodation ............................................................................................ 11
  2.10 Sequencing ...................................................................................................................... 11
      Staff expectations .............................................................................................................. 11
  2.11 Eligibility ........................................................................................................................ 11
      (a) Automated eligibility criteria ......................................................................................... 11
      (b) Manual eligibility criteria ............................................................................................ 12
  2.13 Mobility selection process ............................................................................................... 13
  2.14 Formal offer of Mobility .................................................................................................. 13
  2.15 ‘On-Hold’ facility ............................................................................................................ 13
Business needs .........................................................................................................................13
Personal needs .......................................................................................................................14

2.16 Remuneration following a Mobility move ....................................................................14
CO and EO Higher Pay Scales ...............................................................................................14
Pay rates for the performance of particular duties .................................................................14
Private Secretary Allowance ..................................................................................................14
Annual Personal to Holder Allowance (APTH) payable to Revenue staff members ..........14

2.17 Seniority following a mobility move ............................................................................14

2.18 Work arrangements following a mobility move ..........................................................15
Worksharing ............................................................................................................................15
Flexitime Arrangements ........................................................................................................15
Carer’s Leave ..........................................................................................................................15
Maternity Leave .......................................................................................................................15

SECTION 3 – Guidelines for Local HR – Interim Off-System Process .................................16

INTERIM OFF-SYSTEM OFFER PROCESS ......................................................................16

3.1 LHR Access to system ....................................................................................................16

3.2 Ineligible applicants ........................................................................................................16
Current organisation, grade and/or location for less than 2 years: ......................................16
Satisfactory performance for previous working year: ..........................................................16

3.3 Role of Local HR in processing applications ................................................................17

3.4 Suitability Report ............................................................................................................17

3.5 Mobility Move ................................................................................................................20
Exceptions to making an offer to the first eligible applicant ..............................................21

APPENDIX 1 ............................................................................................................................22
Commencement of Offer Notification ..................................................................................22

APPENDIX 2 ............................................................................................................................23
Outcome of Assessment Notification - Unsuitable .................................................................23

APPENDIX 3 ............................................................................................................................24
Offer of Mobility Notification .................................................................................................24
Introduction

The Civil Service HR Division in the Department of Public Expenditure and Reform are pleased to issue the ‘Local HR Guide for Civil Service Mobility’ to assist HR Managers\(^1\) with the operation of the Civil Service Mobility scheme.

The general information contained in this paper has already been communicated to members of the HR Working Group representing your organisation. The purpose of the paper is to consolidate the information into one document for ease of reference.

Some issues in this paper are subject to ongoing review, negotiation, revision and development. As such, further versions of the paper may be circulated on an ongoing basis.

The Mobility Policy team would like to acknowledge the following stakeholders for all their help in developing the scheme: the Sponsors of the scheme; the Civil Service Management Board; HR Manager Working Group; HR Practitioner Working Group; Local Office Managers; the Central Mobility team and ICT Lead in HR Shared Service - NSSO; Civil Service Renewal Programme Management Office - DPER; the Public Appointments Service; Ordnance Survey Ireland; the ICT developers; and representatives from the Staff Side.

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\(^1\) Denotes Personnel Officer throughout the Paper.
GLOSSARY OF TERMS

Central Mobility Team (CMT): The team in HR Shared Services (previously PeoplePoint) who are responsible for administering Civil Service Mobility.

Eligibility: The criteria which require fulfilment in order for an applicant to receive an offer of transfer. COs and EOs can apply for mobility regardless of eligibility – applicants will be deemed ineligible at the time but will retain their position and be marked eligible once they meet all the automated criteria.

HRMS: The system where Civil Service Mobility is based. It can be accessed through your HR Shared Services Self-Service.

Legacy Date: An applicant’s pre-Civil Service Mobility application date for transfer. A legacy date could be applied before 08/02/2018 and verified before offers of Mobility commence. The verification period is now concluded.

Receiving Local HR: The Local HR of the organisation the applicant wants to move to.

Sending Local HR: The Local HR of the applicant’s current organisation.

Waitlist: The list of staff members within a certain grade who have applied for Mobility to a specific organisation and Zone.

Zone: A mobility area as defined under the terms of the scheme. This may comprise a number of different locations/townlands.
SECTION 1 – Civil Service Mobility

1.1 Objective of Civil Service Mobility
Civil Service Mobility is one of a number of arrangements to be put in place to fulfil the requirements of Action 15 of the Civil Service Renewal Plan which calls to ‘Expand career and mobility opportunities for staff across geographic, organisational and sectoral boundaries’. The Civil Service Mobility scheme aims to generate an open, fair, transparent and practical system that facilitates effective mobility of staff across the Civil Service in pursuit of development opportunities and relocation while also supporting the needs of the business.

1.2 Agreed Guiding Principles for Mobility Policies in the Civil Service
The following broad principles were agreed in January 2016 by the Civil Service Management Board (CSMB), to be used as guidance for any mobility policy or scheme for the Civil Service. The CSMB also agreed that mobility policies at all levels will have regard to gender balance. These principles underpin both the ‘Guidelines for Departmental Internal Mobility’ and the ‘Civil Service Mobility scheme’.

Approved Guiding Principles for Civil Service Mobility Policies

1. Mobility initiatives should be driven by the need to:
   - enhance an organisation’s workforce capability in a cost-effective way;
   - support and enhance career development of staff; and
   - facilitate relocation of staff.

2. Mobility initiatives should be open, fair and transparent.

3. Investment made through the Learning and Development programme will be taken into consideration when determining frequency of mobility.

4. Staff mobility schemes may vary in their duration, arrangements, and operation, and should be tailored to meet the needs of the organisation and its staff.

5. Mobility initiatives should facilitate staff requests for relocation to another organisation and/or geographical location within a reasonable timeframe. However, all internal, interdepartmental and/or external mobility should have regard to organisational demands and the need to maintain business continuity.

6. Staff who have unsatisfactory performance, sick leave and/or an open disciplinary issue may be refused mobility opportunities until sufficient improvements are made.

7. Mobility initiatives should be regularly reviewed for their effectiveness with a view to continually improving human resource management and meeting business needs.
1.3 Phases of the Civil Service Mobility scheme
As approved by the CSMB the Mobility scheme is being developed for the Civil Service on a phased basis as outlined below:

Phase 1A facilitates mobility for the general Civil Service grades of Clerical Officer (CO) and Executive Officer (EO) between and within 46 zones excluding mobility transfers within Dublin (zone 46). A centralised automated system has been developed for both staff members and Local HR and is administered by HR Shared Services (HRSS), NSSO and Local HR where the organisation is not a customer of HRSS.

Phase 1B will facilitate mobility for the general Civil Service grades of CO and EO within the zone of Dublin (zone 46).

It is envisaged that Phase 1B will be launched following a full analysis of the outcomes from Phase 1A of the scheme. This phase will launch at a later date.

Phase 2 will facilitate mobility for the general Civil Service grades of HEO, and AP. Phase 2 will be developed once Phase 1B of the Scheme has been implemented.

Technical and Professional grades are not included in the initial phases and consideration will be given to include these at a later date.

1.4 Internal Mobility Policy
A commitment was made by the CSMB that all organisations must develop and publish an internal mobility policy in line with the ‘Guidelines for Departmental Internal Mobility’ which issued to all HR Managers in January 2017.

A revised/new mobility policy should be published by all organisations in advance of the ‘initiation of offer’ stage on 10th September 2018. All new/revised internal mobility policies for the grades of CO and EO will only incorporate staff mobility within the defined 46 zones of Phase 1A. All former regional transfer arrangements (including ‘Head-to-Head’) between zones will expire with effect from this date.

An organisation’s internal mobility list will continue to take precedence for movement within a zone.

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2 See Circular letter to all Heads of HR/Personnel Officer in all Department and Offices Personnel Officers dated 4 January 2007 - Guidelines on Departmental Internal Mobility – Action 15
SECTION 2 - Phase 1A of the Civil Service Mobility Scheme

2.1 Participating Organisations and Grades

All Civil Service organisations are participating in the scheme which is open to c.17,000 Civil Service staff members in the participating grades of CO and EO.

Mobility moves through the scheme will be made on a voluntary basis and all assignments will be permanent.

Applicants will be fully responsible for their own application(s).

Communications to mobility applicants, including offers of mobility, will be provided solely through email.

2.2 Organisations/Grades not included in the Scheme

Civil Service Grades

General service grades not covered under clause 2.1, and Professional/Technical grades are not currently included in the scheme.

Industrial Grades

State Industrial employees are not included in the scheme.

Staff working on contract

The scheme is open to permanent Civil Servants only.

Public Service Bodies

The scheme does not include moves to/from the Public Service.

2.3 Governance Structure

CSHR Division

The policy owners of the scheme are Civil Service HR Division (CSHRD), Department of Public Expenditure and Reform (DPER), in collaboration with HR Managers.

As policy owners they will:

- monitor and review the progress of Phase 1A for its effectiveness and revise the Terms and Conditions as necessary in consultation with HR Managers, the Staff Side and the CSMB,
- respond to policy questions from all stakeholders,
- promote awareness of mobility across the Civil Service.

Local HR

Local HR are the lead administrators where an offer is under consideration or an offer is made. They will promote awareness of the scheme in their organisation. They will comply with the Terms and Conditions of the Scheme (view at https://hr.per.gov.ie/civil-service-mobility/).

HR Shared Services

HR Shared Services, NSSO are the administrators of Civil Service Mobility for their customers only.

Local HR – non-HRSS - Garda Civilians, An Garda Síochána, and Houses of the Oireachtas

Local HR in the above organisations are the Administrators of the scheme for their staff members.
Local HR – non-HRMS - Irish Prison Service, Ombudsman for Children’s Office, National Council for Curriculum and Assessment

Local HR in the above organisations are the Administrators of the scheme for their staff members.

2.4 Participating Staff Members

Staff members have direct accessibility to an automated portal through HR Shared Services. In making an application, an applicant will be asked to:

(a) confirm if they are a permanent Civil Servant;
(b) indicate that they have reviewed the Job Descriptions relevant to their current grade along with specific requirements for some organisations;
(c) review and accept the Terms and Conditions of the scheme (view at https://hr.per.gov.ie/civil-service-mobility);
(d) indicate the level of their Irish language proficiency;
(e) select mobility zone(s) and organisation(s) they wish to apply to. At this stage an applicant may ‘hover’ over their own name to view details of their current grade and length of reckonable service. This hover tool includes an alert to ensure the applicant has a valid monitored personal email address recorded on the ‘Personal Information’ page and where their business email is incorrect to raise a case with HR Shared Services.

Staff members who are not HR Shared Services customers but who are on HRMS

The respective Mobility Teams in the organisations are the administrators of Civil Service Mobility for their staff members only.

Staff members must complete an application form (available at http://hr.per.gov.ie/civil-service-mobility/) and forward it directly to the Mobility Team in their parent organisation for entry on the Mobility Portal on their behalf.

Staff members who are not HR Shared Services customers and are also not on HRMS

The Mobility Teams in these organisations are the administrators of Civil Service Mobility for their staff members only.

Staff members must complete an application form (available at http://hr.per.gov.ie/civil-service-mobility/) and forward it directly to the Mobility Team in their parent organisation for date stamping and recording purposes.

This category of staff will be managed by an off-system process. In some instances this will result in the waitlist position of on-system applicants being misaligned.

The Mobility Policy team, CSHR, DPER are currently working with the NSSO to seek an ICT solution to include this last category of staff members.

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3 Remote workers or staff members absent on leave (Career Break, Shorter Working Year, Domestic Leave, Carer’s Leave, etc.) must complete an application form (available at http://hr.per.gov.ie/civil-service-mobility/) and forward it directly to the Central Mobility Team at HR Shared Services, NSSO.

4 Civilians who are employed by An Garda Síochána (“Garda Civilians”), and Houses of the Oireachtas

5 Irish Prison Service, Ombudsman for Children’s Office, and National Council for Curriculum and Assessment
2.5 Legacy Transfer Mechanisms
This single scheme supersedes the following transfer mechanisms for the participating grades:

- Central Application Facility (CAF),
- Central Transfer Lists,
- Organisational Internal Regional Transfer Lists.

For a limited time [13th November 2017 – 7th February 2018] applicants could apply their original ‘legacy date’ from the above mechanisms to their Mobility application.

**Local HRs may no longer use the above mechanisms, nor the former Head-to-Head arrangements following the ‘initiation of offer’ stage on 10th September 2018.**

2.6 Ranking of Waitlists
Waitlist positions are based on the following:

Wave 1 – applications received between 13/11/2017 and 08/12/2017 are treated as Day 1. In the first instance, priority is based on the application date. Where a legacy date was entered, this is considered the application date. In the second instance, priority is based on the length of reckonable service\(^6\) in the grade.

Wave 2 – applications received between 09/12/2017 and 07/02/2018 are treated on a daily basis. In the first instance, priority is based on the application date. Where a legacy date was entered, this is considered the application date. In the second instance, priority is based on the length of reckonable service (see preceding footnote) in the grade.

Wave 3 – all applications received from 08/02/2018 onwards are treated on a daily basis. In the first instance, priority is based on the application date. In the second instance, priority is based on length of reckonable service (see preceding footnote) in the grade. Legacy dates are not applicable.

2.7 Mobility Zones
Staff members can apply for a maximum of 3 from a list of 46 mobility ‘zones’ ([https://hr.per.gov.ie/wp-content/uploads/List-of-organisations-per-zone.pdf](https://hr.per.gov.ie/wp-content/uploads/List-of-organisations-per-zone.pdf)), with no restriction on the number of organisations applied for within each zone. Each zone includes a number of towns along with some optional ‘satellite towns’. The choice of zones includes mobility between organisations in the same geographical zone the applicant is located in at the time of their application.

**Phase 1A excludes mobility between organisations in Co. Dublin (Zone 46).**

An interactive map of Ireland, can be viewed at [https://hr.per.gov.ie/civil-service-mobility/](https://hr.per.gov.ie/civil-service-mobility/) which provides information about each building such as: flexitime; shorter working year; work sharing; 24/7 shifts; wheelchair friendly building; Irish requirement and the total number of whole-time positions per grade in the building.

There is no priority on zone or organisation preferences applied for.

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\(6\) Length of reckonable service in grade is calculated through full back-read through an applicant’s Job Data on their HRMS record from the date of application to their date of entry to the grade (i.e. Job Code) minus all unpaid leaves of absence during the period (Career Break; Shorter Working Year; Maternity Leave (Unpaid Extension to Paid entitlement only); Special Leave Unpaid [Domestic Leave])
2.8 Irish Proficiency
Applicants who indicate their competency in the Irish language [Advanced/Intermediate/Basic], and who are offered a mobility move to a position requiring Irish, may be required to undergo an assessment of their Irish language skills before confirmation of the mobility move is made. Where Irish language skills, following the assessment, are not considered adequate for the role, the applicant’s placing on a mobility list (or lists) will not be affected.

2.9 Reasonable Accommodation
The Civil Service is committed to providing reasonable accommodation for people with disabilities in accordance with the Equality Acts. Upon an offer of mobility, and where an applicant’s disability status was not considered by the Receiving Organisation as part of the application process (where Applicant was deemed suitable under Attendance by the Sending Local HR), an applicant should make the Receiving Local HR and/or the Disability Liaison Officer aware of any functional limitations they may have in order that reasonable accommodation can be considered. All requests for reasonable accommodation will be dealt with on a case by case basis. While all efforts will be made to provide reasonable accommodation, in some instances where any measures proposed would not be effective or practical, or would constitute a disproportionate burden on the receiving organisation, the applicant’s placing on Mobility waitlists will not be affected.

2.10 Sequencing
Organisations will adopt a sequence of filling vacant posts in accordance with the following organisational nationwide sequence:

**CO** – 50% Mobility : 50% Open

**EO** – 40% Open : 30% Interdepartmental* : 30% Internal

(*one in every two Interdepartmental vacancies to be filled by mobility).

**Note**: The EO sequencing will revert to 50% Open : 25% Interdepartmental : 25% Internal on conclusion of the Public Service Stability Agreement, 2018-2020.

Staff expectations
It is expected that vacancies in some locations will fall short of the number of applications made whereas in other locations it is likely that waitlists may fall short of number of vacancies arising.

Following the establishment of waitlists and analysis of the pattern of applications, the sequencing will be reviewed and may be modified or set aside to facilitate legacy transfer applications, for an agreed period, following consultation with HR Managers and the Staff Union.

2.11 Eligibility
(a) Automated eligibility criteria
All permanent Civil Service staff members can make an application for mobility at any time in their career. If they do not qualify for mobility at the time of application based on the below criteria under ‘Eligibility’, they will remain on the waitlist until they are deemed eligible and will retain their application date, which will determine their priority on the Mobility waitlist(s).
An applicant will be automatically deemed⁷ eligible on the Mobility system if they have:

(a) 2 years’ service, or more, in the current grade;
(b) 2 years’ service, or more, in the current organisation;
(c) 2 years’ service, or more, in the current geographical location;
(d) a PMDS/performance rating of ‘Satisfactory’ for the previous working year.

There are additional criteria that Local HR are required to complete, set out at (b) below, to determine if an applicant is suitable for Mobility prior to an offer being made.

The eligibility criteria indicators can be viewed by the applicant or a request can be made to the relevant Mobility Team where an applicant has no access to the Self-Service system.

(b) Manual eligibility criteria
When a receiving Local HR progresses with the 1st eligible applicant, the sending Local HR are required to complete an assessment of the applicant’s current suitability for Mobility under the following criteria:

a) Performance Improvement Plan (PIP) under Circular 24/2016;
b) Disciplinary warnings and/or sanctions under Circular 19/2016;
c) Formal investigations under the Civil Service Disciplinary Code which may lead to disciplinary action; and/or
d) Attendance Record – using the following guiding threshold levels:
   - more than 56 days absence in the previous four years (prorated);
   - more than 25 instances of absence in the previous four years (prorated).

Assessment of the applicant under criteria (a), (b) and (c) above will be undertaken by the Sending Local HR only. Both the Sending and the Receiving Local HR may assess the applicant under criteria (d) in cases where the applicant is in excess of the guideline absence thresholds and discounting has been deemed appropriate by the Sending Local HR.

2.12 Appeals Process:
An applicant has a right to lodge an appeal against a determination of unsuitability where their threshold level(s) (2.11 (b) Attendance Record) have been exceeded.

A notification of an appeal should be submitted in writing to the HR Manager in the organisation that determined the unsuitability within five working days from the date of notification of unsuitability.

The application of appeal should be acknowledged by Local HR upon receipt of same. There should be no delay in re-assessing the case and the applicant should be informed of what steps are being taken.

Where the determination of unsuitability was made by the Sending Organisation, the applicant will not be considered for any Mobility moves pending the outcome of the appeal process.

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⁷ This is an automatic process where the applicant is on HRMS and a manual process where the applicant is non-HRMS.
Where the determination of unsuitability was made by the Receiving Organisation, the applicant will not be considered for any Mobility moves to this organisation pending the outcome of the appeal process.

Where an appeal is lodged, Local HR are required to hold the post open for a maximum of 60 working days from the date of notification of unsuitability to ensure business continuity.

After 60 working days, if the appeal is ongoing and a determination has not yet been reached, the receiving LHR can proceed in filling the post with the next eligible applicant on the relevant waitlist.

Note: There may be only one appeal per live case. If the appeal is overturned by the Sending Local HR this will deem the applicant suitable.

2.13 Mobility selection process
Where a vacancy is to be filled through the Scheme, the receiving Local HR should view their inbound waitlist, select the 1st eligible applicant deemed eligible under the criteria at clause 2.11(a) – see Clause 3.3 for further information.

2.14 Formal offer of Mobility
Where an applicant is deemed suitable for mobility under all eligibility criteria in Clause 2.11, the Receiving Local HR can initiate a formal offer – see Clause 3.5.

The applicant will be allowed a period of 5 working days to either accept or decline the formal offer. A decline or non-response by a staff member to a formal offer of mobility will result in the termination of all mobility applications for the same zone.

Exceptions to the termination of all mobility applications are:

- Where an applicant who has indicated a competency in the Irish language is not considered suitable for the post, following an assessment of their Irish language skills.
- Where reasonable accommodation cannot be provided by the receiving organization – see clause 2.9.
- Where the applicant has indicated a satellite town only. In this instance the main zone will also be selected as an applicant must choose the organisation and then the satellite.

Where the applicant formally accepts the mobility offer, a date for the move will be agreed at HR Manager level.

All mobility moves should take place within 4 weeks of the formal acceptance of the mobility offer.

2.15 ‘On-Hold’ facility
Business needs
Local HR have the facility to temporarily place an office outbound list ‘on-hold’ in the event that moves would have a negative impact on the business needs of that office. A decision to use this facility should only be made where there are critical business reasons and should include a business case to support this decision.

Ongoing suspensions will be reviewed by CSHRD in DPER, following a six-month period, in consultation with the relevant HR Manager and the Staff Side. This review may include reporting to the CSMB.
Applicants on the outbound list will keep their priority placing on all lists, however, will not receive any offers of mobility.

**Personal needs**
Applicants will have the facility to temporarily place their application ‘on hold’. While on hold, no offer of mobility will be made; however, the applicant will keep their priority placing on all lists.

### 2.16 Remuneration following a Mobility move

**CO and EO Higher Pay Scales**
Higher pay scales will be retained following a mobility move.

#### Pay rates for the performance of particular duties
Applicants holding a pay rate/payment for the performance of particular duties, hours above the standard Civil Service hours or shift-working etc., and voluntarily moving to a position where these duties/liabilities or other factors for which they are payable do not apply, will not retain the pay rate/payment and will be assimilated to a general Civil Service payscale based on reckonable service.

In general applicants who hold a pay rate for carrying out duties and move through the scheme to a position where they carry out similar duties will retain this pay rate. Where it is determined that a salary scale is affected by a mobility move and the applicant declines the offer all applications for the zone will automatically terminate.

**Private Secretary Allowance**
The Private Secretary allowance is the only Civil Service allowance that has a retention element attached to it. A pre-2012 Private Secretary will carry 50% of the allowance indefinitely and a post-2012 Private Secretary will carry an annually diminishing percentage of the allowance over a four year period i.e. 50% year 1, 40% year 2, 30% year 3, and 20% year 4. In other cases, 25% of the allowance is paid for one year where the staff member has served in the position between six and 12 months.

**Annual Personal to Holder Allowance (APTH) payable to Revenue staff members**
Where a Revenue staff member holding an APTH moves through the scheme to another organisation, they will receive a one-off compensation for loss of actual earnings based on the first 12 months following a mobility move. This compensation will be based on 1.5 times the actual loss, which should be established by the receiving organisation by comparing actual loss of earnings following a full 12 month period with a corresponding 12 month period in Revenue. All extra payments in the receiving organisation should be taken into consideration in the comparison calculation such as overtime, shift allowance, promotion etc.

### 2.17 Seniority following a mobility move

Reckonable service in the EO grade will be transferred for seniority purposes and the staff member will be placed accordingly on the seniority list of the receiving organisation.

Reckonable service in the CO grade will not be transferred for the purpose of seniority. Seniority will start anew in the receiving organisation.

Where there is any doubt as to the relative seniority of an applicant this will be established with the HR Manager of the sending organisation.
2.18 Work arrangements following a mobility move

Worksharing
In general, positions will be full-time and worksharing staff members who avail of mobility may be required to alter their workshare arrangements, including resumption to full-time work, subject to the business needs of the receiving organisation. An applicant may, however, apply for a worksharing arrangement under Circular 12/2013 following their mobility move.

Flexitime Arrangements
Staff members who avail of mobility will not retain an automatic right to flexible working arrangements. Flexitime is only possible where it is available in the receiving organisation. Flexitime is only available in accordance with the arrangements of the receiving organisation.

Carer’s Leave
A staff member on Carer’s Leave under Circular 39/05 will be treated as if they had not been absent from their employment so that all their employment rights, except the right to remuneration, annual leave and public holidays in excess of the initial period of 13 weeks of Carer’s Leave and superannuation benefits, will be unaffected during the leave.

Maternity Leave
While on maternity leave (under Circular 35/95 Maternity Leave, Circular 9/01 Extension of Maternity and Adoptive Leave), a staff member must be deemed for all purposes (other than remuneration) to have been in employment. In the case of a staff member who is on probation at the commencement of maternity leave, the period of probation will stand suspended during maternity leave (and during additional maternity leave where applicable) and will be completed by the staff member on return to work.
SECTION 3 – Guidelines for Local HR – Interim Off-System Process

INTERIM OFF-SYSTEM OFFER PROCESS
The ICT system ‘Go-Live’ for Mobility moves under Phase 1A of the Civil Service Mobility scheme was deferred earlier this year. This deferral was necessary to review the use of absence thresholds to determine eligibility for Mobility. The review was carried out in consultation with key stakeholders.

We are launching an interim off-system process from 10th September 2018 to facilitate offers as we finalise the technical changes to reconfigure the Mobility System.

All offers of Mobility made will be underpinned by the revised Terms and Conditions for the scheme (view at https://hr.per.gov.ie/civil-service-mobility/).

It is important that Local HR maintain an accurate record of the actions carried out while the Interim process is in place.

3.1 LHR Access to system
Local HR will have access to:

- View the inbound list for their organisation, including eligibility status;
- View the outbound list for their organisation, including highest waitlist position per applicant;
- Choose the first applicant deemed eligible to fill a vacant position through mobility;
- Place outbound location on hold.

3.2 Ineligible applicants
The Mobility IT system automatically extracts information from an applicant’s HRMS record and the applicant will be flagged as ineligible if they do not meet the eligibility criteria at clause 2.11 (a). An applicant may request their Local HR/Line Manager to review an ineligibility as follows:

Current organisation, grade and/or location for less than 2 years:
Where the applicant believes that this information is incorrect, they may request their HR to review and update the HRMS record/submit any required updates to HR Shared Services for updating on the HRMS system.

Satisfactory performance for previous working year:
The PMDS process incorporates a mechanism to appeal a rating of ‘Unsatisfactory’.
3.3 Role of Local HR in processing applications

Receiving LHR

Where a vacancy arises and the post is deemed to be filled through the Mobility scheme having regard to business needs, sequencing arrangements, and gender balance in the office the receiving LHR is required to:

- Manually select the first eligible applicant on their Inbound List for the specified Zone (see section below 'Exceptions to making an offer to the first eligible applicant');
- Contact the relevant Sending LHR and request that their office inform the applicant that they may be made an offer of Mobility – [see Commencement of Offer notification at Appendix 1];
- Request that the Sending LHR complete a Suitability Report for the applicant and inform the Receiving LHR of the outcome.

Sending LHR

When requested to do so, the Sending LHR should contact the applicant to:

- Advise applicant that an offer of Mobility may be made pending the outcome of the Suitability Report – [see Commencement of Offer notification at Appendix 1];
  On receipt of notification Sending LHR should advise the applicant that if they
  o opt to cancel their application at pre-offer stage within 3 working days, all of their applications for the Receiving organisation in the specified Zone will be cancelled;
  o decline an offer made following the suitability assessment, all applications for all organisations in the specified Zone will be cancelled.

Following contact from the applicant the Sending LHR (HRSS organisations) should raise a case with the Central Mobility Team (CMT) to:

- Advise that the staff member is being considered for an offer of Mobility (case outline should include the applicant’s name, PPSN, the name of the receiving PSB and number of the Mobility Zone);
- Advise if the applicant has opted to cancel their application at pre-offer stage;
- If an applicant cancels their application at pre-offer stage, the application(s) will be withdrawn for the specified organisation in the specified zone only. The staff member may re-apply for the same organisation, however, the application will be prioritised on the new date that the application is made.

3.4 Suitability Report

Sending LHR should complete the Suitability Report:

- Inform the Applicant of the decision and review date/appeals process where applicable;
- Inform the Receiving LHR of the outcome of the suitability assessment – every effort should be made to disclose this information within 5 working days to avoid any unnecessary delays in the mobility process.

The Report template is divided into the following sections and should be completed in line with the related Guidance Note.
• Section 1 deals with Underperformance;
• Section 2 deals with Disciplinary matters;
• Section 3 deals with Investigations;
• Section 4 deals with the assessment of an applicant’s attendance record.

**Section 1 and 2 (Underperformance & Disciplinary matters)**

If the applicant is deemed unsuitable for Mobility at this time under Section 1 or 2 of the Suitability Report, the determination cannot be appealed.

**Where Section 1 or 2 is answered in the affirmative Sending Local HR to:**

• Formally notify the applicant of the outcome and date when their suitability status will be reviewed.
• Notify the Receiving Local HR of the outcome and advise them to select the next eligible applicant.

**Section 3 (Investigations)**

If the applicant cannot be assessed for Mobility at this time on account of an ongoing investigation, Section 3 of the Suitability Report should be answered in the affirmative - there is no appeal mechanism in this case.

**To Note:** Where Section 3 is answered in the affirmative, the Sending LHR must also complete Section 4 of the Suitability Report. Consideration of the applicant’s attendance record takes precedence in terms of the suitability assessment process.

**Where Section 3 is answered in the affirmative Sending Local HR to:**

• Formally notify the applicant of the outcome and date when their suitability status will be reviewed.
• Notify the Receiving Local HR of the outcome and advise them to hold the post open for 60 working days before selecting the next applicant.

**Possible outcomes:**

• Where the applicant is subject to an ongoing investigation the position must be held open for a period of 60 working days or until a determination is reached in the investigation (whichever is the earliest).
• Where an investigation concludes within the 60 working day timeframe and it is determined that no disciplinary action is to be taken in respect of the applicant, the Sending LHR deems the applicant suitable and the Receiving LHR can progress with the move.
• Where an investigation concludes after the 60 working day timeframe and it is determined that no disciplinary action is to be taken in respect of the applicant, the Sending LHR deems the applicant suitable and informs the applicant.
• Where an investigation concludes within the 60 working day timeframe and it is determined that the applicant is to be subject to disciplinary action, the Sending LHR deems the applicant unsuitable, records a new review date and informs the applicant. Receiving HR can proceed with the next eligible applicant.
Where an investigation concludes after the 60 working day timeframe and it is determined that the applicant is to be subject to disciplinary action, the Sending LHR deems the applicant unsuitable, records a new review date and informs the applicant.

Section 4 (Attendance)

If the applicant is deemed unsuitable for Mobility at this time under Section 4 of the Suitability Report, the determination can be appealed.

HR managers (Sending & Receiving organisations) should be guided by the ‘Assessment of Attendance Records for the Purposes of the Mobility Scheme’ at Appendix A of the Suitability Report. The advices on discounting should be applied to all cases where an assessment of attendance is considered necessary.

The LHR that made the determination of unsuitable is responsible for processing the appeal.

Possible outcomes:

Where the Sending LHR deems the applicant unsuitable for Mobility at this time following an assessment of their attendance record:

- Sending LHR formally notify the applicant of the outcome, the date when their suitability status will be reviewed and appeals process – applicants have **5 working days** to make an appeal [see Notification of Assessment at Appendix 2];
- Sending LHR notify the Receiving Local HR of the outcome and if an appeal is received;
- Where no appeal is received within the timeframe, Sending Local HR notify the Receiving LHR and advise that they can select the next eligible applicant;
- Where an appeal is received, Sending Local HR notify the Receiving LHR that the position must be held open for a period of **60 working days** or until determination of appeal (whichever is the earliest);
- Where a determination of unsuitable is overturned on appeal within the 60 working day timeframe, the applicant is deemed suitable by the Sending LHR who formally advise the Receiving LHR that they can proceed with the offer of Mobility.
- Where a determination of unsuitable is overturned on appeal outside of the 60 working day timeframe, the applicant is deemed suitable by the Sending LHR who formally advise the applicant of the outcome.
- Where a determination of unsuitable is upheld, the applicant’s suitability status remains the same pending review. Sending LHR should formally advise the applicant of the outcome of the appeals process.

Where the Sending LHR deems the applicant suitable for Mobility at this time following an assessment of their attendance record however, they have breached the guiding Attendance thresholds:

- Sending LHR notify the Receiving Local HR of the outcome;
- Receiving LHR can request a copy of the applicant’s sick leave report. This is for the purpose of assessing if reasonable accommodation might be required (in respect of any ongoing disability) with a view to considering if the Receiving Organisation is in a position to provide that reasonable accommodation, in respect of the applicant.
Where the Receiving LHR deems the applicant unsuitable for Mobility at this time following an assessment of their attendance record:

- Receiving LHR notify the Sending LHR of the outcome and review date for the applicant;
- Sending LHR formally notify the applicant of the outcome, the date when their suitability status will be reviewed and appeals process – applicants have 5 working days to make an appeal with their LHR [see Notification of Assessment at Appendix 2];
- Where no appeal is received within the timeframe, Sending LHR notify the Receiving LHR and advise that they can select the next eligible applicant;
- Where an appeal is received within the specified timeframe, the Sending LHR should inform the Receiving LHR who proceed with the appeal without delay;
- Where an appeal is received the position must be held open for a period of 60 working days from the determination of unsuitable or until determination of appeal (whichever is the earliest);
- Where a determination of unsuitable is overturned on appeal within the 60 working day timeframe, the applicant is deemed suitable by the Receiving LHR who formally advise the Sending LHR and applicant of the outcome and proceed with the offer of Mobility.
- Where a determination of unsuitable is overturned on appeal outside of the 60 working day timeframe, the applicant is deemed suitable by the Receiving LHR who formally advise the Sending LHR and applicant of the outcome;
- Where a determination of unsuitable is upheld, the applicant’s suitability status remains the same for the receiving organisation pending review. Sending LHR should formally advise the applicant of the outcome of the appeals process.

3.5 Mobility Move

Where the applicant is deemed suitable following completion of Suitability Report and there are no additional considerations for Receiving LHR:

- Receiving LHR to contact the Sending LHR to advise applicant of formal offer of Mobility and request that they confirm/decline the mobility offer with a 5 working day period [see Offer Notification at Appendix 3];
- Where the applicant confirms their wish to avail of the offer, Receiving LHR to agree the timeline for the release of the staff member with the Sending LHR, to include date of mobility move and payroll set-up. Sending LHR should contact the staff member within 5 working days to discuss the release date to the new organisation. The release date should be within 4 weeks from the date of formal acceptance of offer by the staff member. LHR should allow sufficient time to process the case in relation to the staff member’s move.
- In all cases, if the staff member is moving from an organisation administered by HR Shared Services, an External Transfer form will be required for completion and added to the particular case.
- If required, refer to the HR Shared Services Portal for more information on the HR Shared Services External Transfer process.
Exceptions to making an offer to the first eligible applicant

(a) Reasonable Accommodation
Upon an offer of mobility, and where an applicant’s disability status was not considered by the Receiving Organisation as part of the application process (where Applicant was deemed suitable under Attendance by the Sending LHR), an applicant should discuss any requirements for reasonable accommodation with the Receiving Local HR and/or the Disability Liaison Officer. All requests for reasonable accommodation will be dealt with on a case by case basis.

The Civil Service is committed to providing reasonable accommodation for people with disabilities in accordance with the Employment Equality Acts. While all efforts will be made to provide reasonable accommodation, in some instances where this cannot be provided, the applicant’s placing on Mobility waitlists will not be affected.

(b) Irish Proficiency
In the event that a position has been deemed to be filled by an applicant who has indicated a competency in the Irish language, LHR can filter the waitlist according to the needs of the position under the following categories – Advanced, Intermediate and Basic.

(c) SO Legacy date
In the event that a position has been deemed to be filled by a former SO\(^8\), LHR can filter the waitlist under the SO filter (former SOs who applied an SO legacy date).

(d) Satellite Town
In the event that a position has been deemed to be filled in a Satellite Town, LHR can filter the waitlist under the Satellite Town.

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\(^8\) As per the recommendations of the Arbitration Board on the SO-EO Integration Agreement, former legacy dates will be extant for a 3 year transitional period up until 31/12/19. Where former SO posts become vacant, LHR will have access to SO legacy dates within each zone. The filling of these posts will be prioritised.
APPENDIX 1

Commencement of Offer Notification

Commencement of Offer notification to issue from Receiving LHR to Sending LHR to inform them that a staff member is being considered for a Mobility move:

Subject: Suitability Assessment Review - Civil Service Mobility

To whom it may concern,

This message is to inform you that [receiving organisation] is considering [applicant name] for an offer of Mobility.

Suitability Report

Your office should now complete the Suitability Report in respect of the above named applicant and inform this office of the outcome. In order to avoid any unnecessary delays in the Mobility process, every effort should be made to complete the suitability assessment within 5 working days from the date of this notification.

Notify Applicant

Your office should also advise the applicant that they are being considered for Mobility and to inform your office if they wish to cancel their application to [receiving organisation] at this pre-offer stage within a 3 working day period. The applicant should also be advised that if they opt to cancel their application at this stage, all of their applications for [receiving organisation] in the specified Zone will be cancelled. They can reapply for [receiving organisation]/Zone combination, however the priority of their application will be based on the date of application.

Please inform this office if the applicant opts to cancel their application at this stage. You will also need to raise a case with the Central Mobility Team, HR Shared Services to advise them of this cancellation.

If the applicant declines an offer of Mobility made following the suitability assessment, all of their applications for all organisations in the specified Zone will be cancelled.

For further information on this process, please refer to user guide for local HR units which can be accessed here .

Yours sincerely,

[receiving organisation].
Outcome of Assessment Notification - Unsuitable

Dear [full name of applicant],

This message is to inform you that you have been deemed unsuitable for Mobility at this time following a review by the Human Resources section in [deciding organisation]. It is open to you request a report of the decision.

The above mentioned determination of unsuitable for Mobility at this time means that you are currently ineligible for Mobility. The determination is due for review by [review date]. If your status is not reviewed by that date, the determination will expire and you will be placed back on your specified waitlists for Mobility.

Appeal

- If the determination in your case was based on an assessment of your attendance record, you are entitled to appeal the decision with the Human Resources section in [deciding organisation].

- The other criteria which are considered as part of the suitability assessment process have their own governance procedures in place and as such, there is no right of appeal for these in the context of the Mobility process.

- If the determination in your case was based on the fact that you are subject to an ongoing formal investigation, the vacancy which you are under consideration for can be held open for 60 working days from the date of this notification or until the investigation is concluded whichever is the earlier. This timeframe is to allow for business continuity.

If you wish to appeal the decision, you are required to lodge an appeal with this office by [date 5 working days later]. Any appeal received will be handled by the Human Resources section in [deciding organisation].

If you lodge an appeal, the vacancy which you were under consideration for can be held open until [date 60 working days from notification]. If no appeal is lodged, the vacancy will not be held open.

Please note that eligibility does not affect the order of your placing on the relevant waitlists.

For further information with regard to this matter, please refer to the terms and conditions for the Mobility scheme here.

Regards,

[sending organisation]
Offer of Mobility Notification

Subject: ACTION REQUIRED – Offer of Mobility for [insert Zone] application under Civil Service Mobility

Dear [applicant name],

I am writing to inform you that you have been deemed suitable for Mobility at this time following a review by the Human Resources section in [deciding organisation].

You are now being offered a position in [receiving organisation] in [Zone] through Civil Service Mobility.

This offer is subject to your formal acceptance or decline which is required by [insert date 5 working days later than this notification].

To accept or decline this offer, you should inform this office before the deadline.

Please note that any declined offer or offer left unanswered after this deadline will be regarded as a termination of your application for this Zone (this includes all organisations within this Zone).

For further information on the Mobility process, please refer to the terms and conditions for the scheme which can accessed here.

Regards,

[sending organisation]