People and Money system

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GH Administrators Guide- How to Perform GH Refresh

Before you start, you might find it useful to view the video, available here, on accessing and accepting or rejecting offers of work. Please make sure you refer to the Guide for Guaranteed Hours for background information on the end to end process and off system steps which is available here.

Contents

Process Steps In Brief........................................................................................................................................2
To Access the GH Refresh Screen..................................................................................................................4
GH Refresh..........................................................................................................................................................7
Update to GH Details.......................................................................................................................................11
Terminations....................................................................................................................................................14
Glossary ............................................................................................................................................................19

Notes

The GH Refresh process is used to facilitate the allocation of guaranteed hours for all GH assignments for the forthcoming GH period and to ensure GH employees in your area of responsibility are given realistic assurances of work.

Use the processes described in this guide to allocate hours to any existing employee on any Guaranteed Hours contract.

Do not use this process if the employee does not have a formal offer of employment. Employees will only appear in the module once they have completed the recruitment process in People & Money.
GH assignments can also be terminated via the Refresh screen.

If a GH assignment is Fixed –Term and requires an extension and the refresh action, you will have to first action the extension via the standard process used for all employees in People & Money. Once this has completed you should then carry out the refresh action.

Refresh data is entered, reviewed and updated directly in the GH Refresh module in real time. As the data is live, with reporting figures constantly being updated, GH Refresh can be performed at the time it is most suitable or whenever there is data to input.

The guaranteed hours refresh letter that informs employees their hours for the coming year is issued directly from the system to employee’s ‘work’ email address.

### In Brief...

**GH Refresh**

This is a simple overview of the process.

1. Access the GH Refresh screen
2. Click on the **Action** button next to the employee you want to allocate hours to
3. From the **Action to be Taken** menu select “GH Refresh”
4. From the **HR Action** field select “GH Refresh”
5. From the **HR Action Reason** field select “GH Refresh”
6. The **GH Start** date is auto-populated to begin the day after the employee’s previous GH period
7. Click on the calendar and select the new **GH End** date.
8. Enter the number of **Guaranteed Hours** allocated to the employee
9. Select the applicable **Number of Hours Period** from the menu
10. If required enter supporting text in the **Comments** field
11. Click **Submit**

For detailed guidance, see the next section.
Update to GH Details

1. Access the GH Refresh screen
2. Click on the **Action** button next to the employee you want to record that no hours will be guaranteed
3. From the **Action to be Taken** menu select “Update to GH Details”
4. From the **HR Action** field select “Update to GH Details”
5. From the **HR Action Reason** field select “Update to GH Details”
6. The **GH Start** date is auto-populated to begin the day after the employee’s previous GH assignment
7. Click on the calendar and select the new **GH End** date
8. Select the applicable **Reason for No Hours** from the menu
9. If required enter supporting text in the **Comments** field
10. Click **Submit**

For detailed guidance, see the [next section](#).

Terminations

There are 2 options within the module to choose from when you wish to terminate a GH assignment.

**Termination**: to be used when the employee either has just 1 assignment with the university, OR, they have multiple assignments but you wish to end them all on the same date.

**End Assignment**: to be used when you wish to end one assignment, where an employee holds multiple.

**Termination**:

1. Access the GH Refresh screen
2. Click on the **Action** button next to the employee you want to terminate
3. From the **Action to be Taken** menu select “Termination”
4. From the **HR Action** field select the appropriate option
5. From the **HR Action Reason** field select the appropriate option
6. Click on the calendar and select the **Termination Date**
7. Click on the calendar and select the **Notification Date**
8. Select the applicable **HESA Reason for End of Contract** from the menu
9. Select the **HESA Location After Leaving**
10. Select the **HESA Activity After Leaving**
11. If required enter supporting text in the **Comments** field
12. Click **Submit**

For detailed guidance, see the [next section](#).
End Assignment:

1. Access the GH Refresh screen
2. Click on the Action button next to the employee with the assignment you want to end
3. From the Action to be Taken menu select “End of Assignment”
4. From the HR Action field select the applicable “End Assignment” option
5. From the HR Action Reason field select the applicable option
6. Click on the calendar and select the Assignment End date
7. Select the applicable HESA Reason for End of Contract from the menu
8. If required enter supporting text in the Comments field.
9. Click Submit

For detailed guidance, see the next section.

To Access the GH Refresh Screen:

1. From the Home page, click the Guaranteed Hours tab.
2. Click the Guaranteed Hours app.

3. After a few moments the Guaranteed Hours dashboard opens in a separate tab. Click the GH Refresh button in the navigation bar on the left.

The GH Refresh screen opens and displays data for all GH Employees in your area of responsibility. By default, the report will sequence the data by GH End Date, with the GH employee who needs to be actioned soonest at the top of the list.
4. Click on the **Action** button next to the applicable employee

On this screen there are various actions that can be carried out against an assignment. These are:

- GH Refresh
- Update to GH Details
- Termination
- End of Assignment
GH Refresh

1. In the GH Refresh Action window, click on the **Action to be Taken** down arrow and select **GH Refresh** from the menu.

Additional fields are displayed to complete.
2. From the **HR Action** field select “GH Refresh”
3. From the **HR Action Reason** field select “GH Refresh”
4. The **GH Start** date is auto-populated to begin the day after the employee’s previous GH period (ie the day after the previous GH End date).
5. Click on the calendar and select the new **GH End** date. This will normally be a calendar year from the start date. The format required is DD-MON-YEAR.
6. Click into the **Guaranteed Hours** field and enter the number of hours allocated to the employee
7. Select the applicable **Number of Hours Period** from the menu. See below for more details.

**Number of Hours Period** indicates how long the guarantee will be for and will impact on the wording that goes into the letter that is automatically issued to the employee. Each should be used in the following scenarios:

- **Per Year/Every Year - Over Dura/FTC** - The minimum hours to be guaranteed are to be the same for each GH Period, for the full duration of the fixed term employment contract related to that assignment.
- **Over Period of Current GHC** - Minimum hours to be guaranteed for full duration of contract e.g. over the 2 year fixed term contract.
- **Over Period of Current FTC** – Minimum hours to be guaranteed for full duration of the current fixed term contract
- **Per Year** - The minimum hours to be guaranteed for one GH Period.
- **Per Year, Every Year** - The minimum hours to be guaranteed are to be the same minimum hours for each GH Period, indefinitely (usually used for open-ended assignments).

8. If required enter supporting text in the **Comments** field
9. If you are ready to submit the action jump to step 12 to continue.

10. If you are not ready to submit click Save and the actions remains in the GH Status of “Saved” until you are ready.

11. To open a saved action, click the Action button next to the applicable employee and make the required amendments.

An action in the GH Status of “Saved” can be opened, edited, or submitted by any of the GH Administrators in your area of responsibility if required.

12. Click the Submit button and the action is submitted to the system.

If the employee is not on a Tier 4 or Student visa, the transaction will be auto-approved. If the employee is on one of these visa types, it will have to be approved by HR.

If auto-approved, the GH Status is updated to “Approved.” Once approved by HR this would also happen.
<table>
<thead>
<tr>
<th>GH Start</th>
<th>GH End</th>
<th>Guaranteed Hours</th>
<th>Number of Hours Pooled</th>
<th>Reason for No Hours</th>
<th>Comment</th>
<th>GH Status</th>
<th>Previous GH Status</th>
<th>Interface Status</th>
<th>Interface Messages</th>
<th>Submitted By</th>
<th>Submitted Date</th>
<th>Approved By</th>
<th>Approved Date</th>
<th>Rejected By</th>
<th>Rejected Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>01-JAN-2022</td>
<td>01-JAN-2023</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Submitted</td>
<td>Saved</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>19-MAY-2021 14:36</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>01-JUL-2021</td>
<td>31-JUL-2022</td>
<td>100</td>
<td>For Year, Every Year</td>
<td>-</td>
<td>-</td>
<td>Approved</td>
<td>Saved</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>28-JULY-2021 09:10</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>01-JUL-2021</td>
<td>31-JUL-2022</td>
<td>100</td>
<td>For Year, Every Year</td>
<td>-</td>
<td>-</td>
<td>Approved</td>
<td>Saved</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>28-JULY-2021 09:10</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>01-JUL-2021</td>
<td>31-JUL-2022</td>
<td>100</td>
<td>For Year, Every Year</td>
<td>-</td>
<td>-</td>
<td>Submitted</td>
<td>Saved</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>28-JULY-2021 09:10</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>
Following approval (either automatic or by HR), the GH Status of the action is updated to “Submitted” - this could take up to 15 minutes to show.

The following morning a GH refresh letter is issued from the system direct to the employee’s email account to confirm the changes. Details of the letter can be found in the Process Guidance for Guaranteed Hours.

Once the entire refresh process has been completed (normally after 15 minutes), the details of the ‘old’ GH Period will appear on the ‘GH Periods’ report. A new row of data will also appear on the bottom of the Refresh screen, awaiting the next refresh action (not likely to be needed for action until a year later, or the end of the new GH period). Every GH employee will appear on the refresh screen in order of GH period end date.

**Update to GH Details**

In exceptional circumstances, an employee may be unable to work and it has been agreed that they will not be offered any hours for a period of time, for example if they will be off work sick long term or they are on maternity leave. ‘Update to GH Details’ can be used to record that no hours will be ‘guaranteed’.

1. In the GH Refresh Action window, click on the **Action to be Taken** down arrow and select **Update to GH Details** from the menu.
2. From the **HR Action** field select “Update to GH Details”.
3. From the **HR Action Reason** field select “Update to GH Details”
4. The **GH Start** date is auto-populated to begin the day after the employee’s previous GH assignment (ie. the day after the previous GH End date)
5. Click on the calendar and select the new **GH End** date
6. Select the applicable **Reason for No Hours** from the menu
   There are 3 options within this menu –
   - Maternity Leave/Shared Parental Leave
   - Long Term Sick
   - Suspension of Contract for Agreed Reason
   Selection of any of these options will not feed into any other process such as maternity or sickness absence. This field is designed to be populated for reporting purposes, and the expectation is that the administrator entering this is
7. If required enter supporting text in the Comments field. It is advisable to enter as much information as is known around why the employee won’t be receiving any hours.

8. If you are ready to submit the action jump to step 11 to continue.

9. If you are not ready to submit click Save and the action remains in the GH Status of “Saved” until you are ready

10. To open a saved action, click the Action button next to the applicable employee and make the required amendments

An action in the GH Status of “Saved” can be opened, edited, or submitted by any of the GH Administrators in your area of responsibility if required.

11. Click the Submit button and the action is submitted to HR for Approval

Note: This action requires approval by HR in the same way ie. those on Tier 4 or Student Visas require approval by HR.

No letter is sent to the employee in this circumstance.
Terminations

There are 2 options within the module to choose from when you wish to terminate a GH assignment.

**Termination**: to be used when the employee either has just 1 assignment with the university.

**End Assignment**: to be used when you wish to end one assignment, where an employee holds multiple.

If you aren’t sure how many assignments an employee holds, click on their name within the Refresh screen and a screen will pop up with details of all their assignments, including any non GH.

If an employee holds multiple assignments you will not be able to end the primary one. It may not be possible to know which of an employee’s assignments is the primary one. If you attempt to end an assignment and receive an error saying this, you will either need to end the non-primary assignment first (if it is ending), or you will need to contact HR Ops in order to have the primary assignment switched to a different assignment. You should do this via a Service Request.

**Termination**:

Please Note: An error will occur if you attempt to terminate a GH employee who has multiple assignments or if you are trying to terminate the primary assignment when other assignments are still active. If this is the case, contact HR Ops via a Service Request to change the employee’s primary assignment.

1. In the GH Refresh Action window, click on the **Action to be Taken** down arrow and select **Termination** from the menu.
Additional fields are displayed to complete.

2. From the **HR Action** field select the appropriate reason
3. From the **HR Action Reason** field select the appropriate option
4. Click on the calendar and select the **Termination Date**
5. Click on the calendar and select the **Notification Date**
6. Select the applicable **HESA Reason for End of Contract** from the menu
7. Select the **HESA Location After Leaving**
8. Select the **HESA Activity After Leaving**
9. If required enter supporting text in the **Comments** field
10. If you are ready to submit the action jump to step 12 to continue.
11. If you are not ready to submit click **Save** and the actions remains in the GH Status of “Saved” until you are ready
12. To open a saved action, click the **Action** button next to the applicable employee and make the required amendments

An action in the GH Status of “Saved” can be opened, edited, or submitted by any of the GH Administrators in your area of responsibility if required.

13. Click the **Submit** button and the action is submitted to HR for Approval

**Note**: HR must approve all terminations, so that they can make some essential checks before it is committed to the employee record.
End Assignment:

If an employee has multiple assignments follow the steps below to end one of them.

1. In the GH Refresh Action window, click on the **Action to be Taken** down arrow and select **End of Assignment** from the menu.

Additional fields are displayed to complete.
1. From the **HR Action** field select the applicable “End Assignment” option.
2. From the **HR Action Reason** field select the applicable option.
3. Click on the calendar and select the **Assignment End** date.
4. Select the applicable **HESA Reason for End of Contract** from the menu.
5. If required enter supporting text in the **Comments** field.
6. If you are ready to submit the action jump to step 10 to continue.
7. If you are not ready to submit click **Save** and the actions remains in the GH Status of “Saved” until you are ready.
8. To open a saved action, click the **Action** button next to the applicable employee and make the required amendments.

An action in the GH Status of “Saved” can be opened, edited, or submitted by any of the GH Administrators in your area of responsibility if required.

10. Click the **Submit** button and the action is submitted to HR for Approval.

**Note**: HR must approve all terminations, so that they can make some essential checks before it is committed to the employee record.
Glossary

System Report Columns

<table>
<thead>
<tr>
<th>Column Heading</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>GH Status</td>
<td>[Blank] – The data has been received in the GH app from Core P&amp;M. This status will show to the user as ‘-’.</td>
</tr>
<tr>
<td></td>
<td>Saved – Changes have been saved and await submission.</td>
</tr>
<tr>
<td></td>
<td>Submitted – Changes have been submitted and await approval</td>
</tr>
<tr>
<td></td>
<td>Rejected – Changes have been rejected. These can be reviewed and resubmitted</td>
</tr>
<tr>
<td></td>
<td>Approved – Changes have been approved and await being interfaced</td>
</tr>
<tr>
<td></td>
<td>Interfaced – Changes have interfaced successfully</td>
</tr>
<tr>
<td></td>
<td>Failed – Something has gone wrong during the interface process</td>
</tr>
<tr>
<td>Previous GH Status</td>
<td>If an action has been taken previously, the previous status will be shown (as above).</td>
</tr>
<tr>
<td>Interface Status</td>
<td>A circle will display with the colour indicating the interface status once approved:</td>
</tr>
<tr>
<td></td>
<td>Blue – Being processed</td>
</tr>
<tr>
<td></td>
<td>Green – Successfully interfaced</td>
</tr>
<tr>
<td></td>
<td>Red – Failed</td>
</tr>
<tr>
<td></td>
<td>Grey – Not yet interfaced</td>
</tr>
<tr>
<td></td>
<td>Interfaced means that the data has transferred into the core P&amp;M system (since the GH module is a ‘bolt on’ piece of software)</td>
</tr>
<tr>
<td>Interface Messages</td>
<td>Displays the number of messages received when interfaced. Clicking this displays a modal window which provides text explanations of why the interface has error-ed.</td>
</tr>
</tbody>
</table>