



Guide to Recruitment and Onboarding

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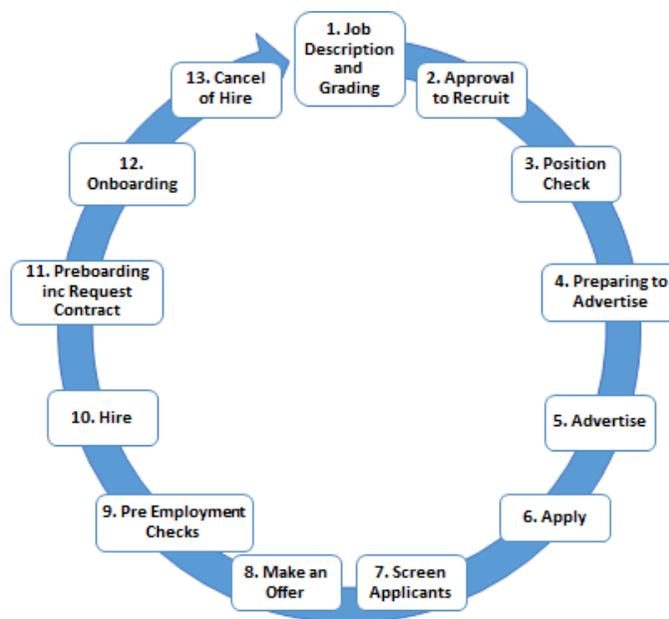
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Introduction

This guidance document has been written to support the Recruitment and Onboarding (including Preboarding) end-to-end business process and details the main business scenarios within the University of Edinburgh. Recruitment processes are those that relate to permanent and fixed term appointments including guaranteed hours, tutors and demonstrators, annualised and fractional contracts. Preboarding and Onboarding refer to the activities you need to do from the point you select a candidate for a role to the end of their first 90 days in the University.

The guidance has been written by stage in the process and with the key roles involved in the process in mind. The responsibilities of a Line Manager, Hiring Manager and School or Department Administrator may vary in this process between Colleges, Schools and Professional Service Group Departments. Line Managers should contact their local support team to understand the process and responsibilities within their own area.

For example, a School or Department Administrator could be performing tasks in the recruitment process of a Line Manager or Hiring Manager and where there is overlap, this is shown.



Glossary

P&M	People and Money
Additional Post	The process of adding another assignment to an employee who is working across more than one assignment.
Advertised Post	It is University's general policy to advertise all positions on the University's Website to leverage the University's brand as employer of choice and support Equality, Diversity and Inclusion. In all instances, Recruiters should also refer to the Redeployment Register. Advertising of a specific position in the organisation structure is managed using the Hiring app in People and Money. There are a number of exceptions (see Non-advertised assignment). Further information is available on the Advertising Guidelines page .
Assignment	The assignment of a person to a specific position or the record of the incumbent in a specific position in People and Money
Candidate Selection Process	This is the framework to move candidates through the hiring process. This allows tracking and management of candidate activity from the time their job application is confirmed to the time that they are hired. The framework uses "Phases" (Key Milestones) each of which have multiple "States" e.g. Interview and Selection (Phase) – Interview to be scheduled (State).
Document Record	The part of People and Money, which holds electronic copies of certain documents. (where applicable)
Fixed Term Reason Codes	A list of acceptable reasons for the use of fixed term contracts
Internal Transfer	The process of moving an employee from one assignment to another
Job	A generic job title that is re-used across the University e.g. Administrator
Job Requisition	Adding the requirements of a job to People and Money to initiate the process of sourcing, selecting and hiring a candidate.
Job Requisition Business Case form	The form that must be completed as part of the request for approval to recruit. The form contains the business justification for the role and supplements the information contained on the Create Job Requisition screen. It must be attached in Section 9 of the Create Job Requisition screen.
Longlisting	A long-list for a job is a large group that has been chosen from all the people who applied for the job. The successful ones from this group are chosen to go on the shortlist.
New Hire	A new employee who has not worked for the university previously
Non-advertised Post	There are certain circumstances when advertising to a specific position in the organisation structure may not be required, namely: <ul style="list-style-type: none"> • Where a Research Grant specifically names the researcher who is to be involved • Where there has been a recent external advertisement (within the last 6 months) for a similar position • Hiring someone for less than 6 months • Posts being filled by NHS staff after recruitment • Someone from the Redeployment Register is being appointed

	in which case a shortened recruitment process applies
Onboarding	Processes and activity between the employees first day and day ninety of employment
People and Money Hiring app	This is an app within People and Money used to advertise, select and hire staff.
Pending Worker	A pending worker is a person who has yet to start employment. A pending worker record can be created upon acceptance of the job offer in P&M or by manually adding a pending worker record. Upon Day 1 of employment, the pending worker will become an employee.
Position	An instance of a job in a particular department. A “seat /slot” in the organisation structure (sometimes referred to as a “post”). May be filled by one or more people. All incumbents must have the same grade band, and sit within the same department. Specific to an individual business unit. Examples – Personal Chair, Manager, Research Assistant, Veterinary Nurse, Finance Administrator.
Preboarding	The activities required to be completed following recruitment and prior to an employee start date
PVG/Disclosure	The Protecting Vulnerable Groups (PVG) membership scheme is managed and delivered by Disclosure Scotland. It helps ensure people whose behaviour makes them unsuitable to work with children and protected adults cannot do 'regulated work' with these vulnerable groups.
Recruitment	All recruiting activities related to Permanent and Fixed Term Contracts, Guaranteed Hours and Apprenticeships.
Rehire	An employee who has previously worked at the university
Secondment	The temporary transfer to another post for a fixed period. Secondments can be an internal secondment (UoE to UoE), external outgoing or external incoming.
Service Request	The term service request is used to describe a help ticket, which is opened with the HR Helpline and sent on to other HR teams to process as needed. It is often shortened to SR.
Shortlisting	The process of identifying the candidates from your applicant pool who best meet the required and desired criteria for the open requisition and who you want to move forward in the recruitment process.
Skilled worker	The Skilled Worker visa is the main work route under the Points Based Immigration System. This visa type was introduced on 1 December 2020 and has replaced a visa previously known as Tier 2 (General).
Subsidiary	The university consists of three subsidiary companies, Edinburgh Innovations, Edinburgh University Press, and UoE Accommodation Ltd. These three companies use People and Money; however, they do not use all parts of the system at the current time. For recruitment to these companies, see Appendix 1”.
Substantive Post	An employee's permanent post - the one they return to after a temporary transfer or secondment to another post
Redeployment Register	A list of staff available for redeployment

UKVI	This is the UK Visas and Immigration department, which is part of the Home Office of the UK Government. UK Visas and Immigration is responsible for making millions of decisions every year about who has the right to visit, stay, or work in the country. The University must comply with the legislation and processes outlined by the UKVI.
UKVI SOC	To be eligible for a Skilled Worker Visa, one of the mandatory criteria is that you have a job at an appropriate skill level as listed on the Skilled Occupation Codes of the Immigration rules
UUN	Your username is your staff universal username (UUN) that you use to login to the majority of University services, including People and Money and email.
Vacancy	A status to indicate the intention to recruit to a resource gap
Work Schedule	The working hours and work pattern an employee is contracted to work for each assignment they hold.

End to End Process Map

Please see the end to end [Recruitment and Onboarding Process Map](#)

Key Roles

Role	Description
Line Manager	All members of staff that have or will have direct or matrix style management responsibilities for the role being recruited. Line Managers may also be Hiring Managers.
Hiring Manager	Hiring Managers will have overall accountability for a set of job requisition actions and the associated job applications. The Hiring Manager is often the Line Manager, but does not have to be.
School/Department Administrator (SDA)	Staff that provide local administrative/operational support for the end-end recruitment process, including offline activity and practical arrangements.
HR Operations	Members of the central HR team that own key transactional elements of the recruitment cycle, e.g. approving/rejecting job requisitions and job offers. Has visibility of job requisitions without being a member of the hiring team.
Collaborator	A current employee that is going to be on the selection panel or a SDA who needs visibility of the vacancy during the recruitment and onboarding process. Assists with some Recruiting type activities e.g. Sifting. Anyone in a post, which is Grade 7, and above, automatically has the Collaborator system role and can be added to a job requisition. Collaborators are able to view but not process applications.
Interview Panel Member	The current employee or an external person that is going to be on the selection and/or interview panel. Interview panellists may also be added to a job requisition as a Collaborator but this can be done at any point in the recruitment process as required. Staff acting as an interview panel member will be added to the job requisition as a Collaborator to grant access to job applications. An external interview panel member will not be added to the requisition as a panel member, receiving relevant information (offline) via email.
HR Advisor/ HR Partner	A member of the HR Partnering team who can provide advice and guidance throughout the recruitment process with specific responsibility for Grading Job Descriptions and supporting HR Operations if any issues found at the 'Before Offer Check' stage.
Business Approver	Approval will go up through the line manager route (following up the hierarchy) in line with the Employment Approvals Guidance .
Candidate	Could be an existing employee within the University (internal), a contingent worker or a member of the public (External). The University may already know external candidates or they are new prospects.
HR Resourcing Team	Strategic Resourcing Partners within the HR function linking resourcing strategy directly to the University Strategic Plan outcomes, market conditions, talent management and succession plans. Develops policies, transformational & modern practices that are aligned to strategy outcomes.
HR Systems Team	The HR Systems team will have responsibility for the set up and maintenance of Oracle Recruitment Cloud and will be able to undertake all tasks assigned to other roles to ensure contingency support.

Agency	An employment agency that has been tasked with finding and submitting suitable candidates for open job requisitions. This may also be a training provider submitting candidates for Modern Apprenticeship opportunities.
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Before you start a recruitment process using the Hiring App

Familiarise yourself with the [Recruitment Guidance Webpages](#)

Undertake the relevant [eLearning modules](#).

Review the [Health and Safety Guidance on Recruitment](#)

Review the [Recruitment User Guide flowchart](#) and [‘Before you create a job requisition’](#).

To help you use this document, check the role you have been assigned in People and Money. Line Managers will be provisioned with ‘My Team’ access and all Line Managers will also have Hiring Manager Access. School and Department Administrators should have access via ‘My Client Groups’. To request access to People and Money complete the [HR Data Access Application Form](#) and submit this via a service request to HR Systems.

Familiarise yourself with the [People and Money User Guides](#) for the Recruitment and Onboarding processes and check the [People and Money Updates webpage](#).

Familiarise yourself with the different contract types the University can offer by reviewing the [Contract types guidance](#). This includes information about annualised and fractional contracts.

If users have any queries about a stage in this process, they should Search My Knowledge for support in the first instance. Follow the P&M user guide [‘How to search my knowledge’](#). If they cannot find the information they need they should raise a service request (SR), following the P&M user guide [‘How to raise and maintain a service request enquiry’](#). Please note it is best to contact the HR helpline by raising an SR and including any relevant attachments you might need.

This guide applies to all types of staff including GH staff and student interns. Subsidiaries should refer to [Appendix 1](#) of this document for all in scope activities

Step 1 - Writing a Job Description and Grading

All jobs must have a corresponding job description that has been approved and graded. Job Descriptions will be created and stored within the Job Description SharePoint, with a link embedded in job advert text for the candidate to access.

Role	Line Manager	Hiring Manager	School/Department Administrator	HR Advisor/ HR Partner
Process	<p>If you do not have a job description that has been graded and approved by the HR Partnering team you should:</p> <ol style="list-style-type: none"> 1)Write the job description using the Job Description Template 2)Allocate a UKVI SOC Code 3)Complete the Grading Request Form and submit this along with the relevant enclosures outlined on the form to the HR Partnering team via a service request ‘Grading Request’ Await the outcome of the Grading request before proceeding. You will receive a system notification once the Grading Request has been completed. 	<p>If you are are also a Line Manager follow the steps for ‘Line Manager’ If Hiring Manager only, you should liase with the Line Manager for the vacancy to obtain the approved Job description.</p>	<ol style="list-style-type: none"> 1)Request the Job Description from the Line/Hiring Manager 2)Allocate a UKVI SOC Code 3)Complete the Grading Request Form and submit this along with the relevant enclosures outlined on the form to the HR Partnering team via a service request ‘Grading Request’ <p>Await the outcome of the Grading request before proceeding. You will receive a system notification once the Grading Request has been completed.</p>	<p>Review Job Description and Grade accordingly. Provide guidance on UKVI SOC code allocation.</p>
<p>Supporting Information</p> <ul style="list-style-type: none"> • Guidance on writing Job Descriptions • Job Grading Policy • Grade Profiles • Guidance on Allocation of UKVI SOC Code • P&M User Guide ‘How to Raise and Maintain a service request’ 				

Step 2 - Approval to Recruit (Job Requisition Business Case)

All new or replacement roles will require completion and approval of the [Job Requisition Business Case form](#). **This applies to all internally and externally funded posts** see the [Employment Approvals Briefing Document](#) for further information. The Head of School or equivalent can approve externally funded posts whilst any requests that require internal/core funds must go to the Head of College or equivalent for approval. A school or business unit may have local (offline) approval processes prior to the People and Money approval process. For example, they may have a management meeting at which all employment requests are discussed. Hiring managers should ask their Line manager or School/ Department Administrator to find out whether local processes apply.

Role	Line Manager	Hiring Manager	School/Department Administrator	Business Approver
Process	1) Complete the Job Requisition Business Case form and save a copy locally 2) Seek off system approval (if applicable) for the post as per local arrangements You should also complete this for externally funded posts, including a copy of the grant award letter. Whilst waiting for the approval to recruit you can begin step 3 'Position Check'.			Approve in line with local process and Employment Approvals Briefing document
Supporting Information <ul style="list-style-type: none"> • Guidance – Before you create a job Requisition • The Job Requisition Business Case form requires a UKVI SOC Code to be included. Further guidance is available on the Skilled Worker webpage • CAH3 Code - Certain roles will also require an Academic Technology Approval Scheme (ATAS) certificate. Before submitting the Job Requisition Business Case form Hiring Managers or SDAs should check if the research activity of the role is covered by ATAS requirements. The list of subject areas can be found on the UK Government webpages under 'Academic Subjects relevant to ATAS' and against each subject area there is a short code – this is known as the CAH3 code. Further information and university procedural guidance on ATAS requirements can be found on the following webpage https://www.ed.ac.uk/human-resources/international-staff-work-uk/additional-permission-work/university-sponsorship/skilled-worker 				

Step 3 – Position Check

The People and Money system is designed around Job Classification Structures. You should familiarise yourself with the [Guidance on Job Classifications and Positions](#) which helps to explain the new job classification structure within People and Money. Before you complete the Job Requisition Business Case form, you must check that there is a position available in the structure within People and Money within the correct grade band and with available FTE.

A position is:

- An instance of a job.
- A seat /slot in the organisation structure.
- May be filled by one or more people. All incumbents must have the same grade band, and sit within the same department.
- Specific to an individual business unit.

Examples – Personal Chair, Manager, Research Assistant, Veterinary Nurse, Finance Administrator.

Details of how to check are held within the guidance document '[Guidance on Position Management](#)'.

There are three options:

1) Position does not yet exist in P&M

In order to create a job requisition in P&M (step 4b) you should request the position first. If the position you want to recruit for does not yet exist you need to create a new position. Follow the P&M User Guide '[How to Request a New Position or Request Position Change](#)'

Note: When creating a new position the 'job' section refers to the type/category of job you are creating. You should choose the most appropriate category noting that each combination of letter and number refers to the grade of the post where A= grades 1-3, B= grades 4&5 C= grades 6-8 D= 9&10 and the subsequent coding refers to the type of post e.g. administration, academic, clinical etc. See appendix 3 in the [User Guide 'How to request a new position or position change'](#) for more information.

2) Position Available but requires an amendment to FTE or Grade

If the position exists in the system but does not have enough vacant FTE against it, follow the [P&M User Guide 'Request New Position or Request Position Change'](#). It is best practice to request this before you create a job requisition, however this can be done in parallel. It must be completed before you appoint the successful candidate.

3) Position exists with sufficient FTE and appropriate Grade

If you have found a suitable existing position within P&M, with available FTE, take a note of the position reference number and proceed to step 4 –‘Check the Redeployment Register’. If an incumbent is leaving a post, their FTE will become available when they leave. There is an overlap period allowed on the same position. If the incumbent leaves before the successful candidate starts the position will remain but with a 0 FTE.

Note: If you are a large area such as a School, you may not find the post when you search using your School’s name. You may have to go down to department level, and enter the department that the post sits under. For example, if it is a teaching secretary you may need to search for your teaching organisation rather than your overall School to find the post.

Role	Line Manager	Hiring Manager	School/Department Administrator	HR Operations
Process	<p>Position does not exist Follow the P&M User Guide ‘Request New Position or Request Position Change’, attaching a copy of the approved Job Requisition Business Case.</p> <p>Position Available but requires amendment to FTE or Grade Follow the P&M User Guide ‘Request New Position or Request Position Change’, attaching a copy of the approved Job Requisition Business Case.</p> <p>Once the request for New Position or Position Change has been reviewed by HR Operations, you will receive a system notification approving/rejecting or requesting further information as appropriate.</p> <p>Position Exists with sufficient FTE and appropriate Grade – Note the position reference number and proceed to step 4 ‘Preparing to Advertise’.</p>			<p>Review and approve or reject new position or position change request. Follow the P&M User Guide ‘How to perform position checks’ and the HR Operations Internal checklist ‘Position Management Checks’</p> <p>Note that the approved Job Requisition Business Case form should be attached the request.</p>
<p>Supporting Information</p> <ul style="list-style-type: none"> • Guidance on Job Classifications and Positions • Guidance – Before you create a job Requisition 				

Step 4 - Preparing to Advertise

Once you have a job description, approval to recruit, and a position available within People and Money you can then proceed with checking the Redeployment Register and advertising the role (if required). Further guidance is available on the [Advertising Guidelines page](#).

Step 4a – Check the Redeployment Register

As part of your preparation to recruit you should check the Redeployment Register to see if there are any current employees available for redeployment. The recruitment webpages provide further detail and guidance on the [Redeployment Register](#). Where a Research Grant specifically names the researcher the Redeployment Register does not need to be checked. An internal candidate can also note on the application what their current employment situation is. If no suitable candidates are identified or suitable from the redeployment register, you can proceed with advertising the vacancy.

Having reviewed the Redeployment Register before advertising, you must also refer back to the Redeployment Register at the following stages of the recruitment process:

- At shortlisting and before inviting candidates to interview, and
- Post interviewing and before making an offer of employment.

This will ensure that you give full opportunity to all staff who become eligible to register themselves on the Redeployment Register, which may occur at any stage of your recruitment process.

Step 4b – Non Advertised roles

There are certain circumstances when advertising may not be required, namely:

- Where a Research Grant specifically names the researcher who is to be involved
- Where there has been a recent external advertisement (within the last 6 months) for a similar position
- Hiring someone for less than 6 months
- Posts being filled by NHS staff after recruitment
- Someone from the Redeployment Register is being appointed

Non-advertised roles do not need to have a job requisition on P&M. In this scenario, any shortlisting or interviews will be arranged offline. You should proceed to [Step 9 - Pre Employment Checks](#) and then follow remaining steps to create the pending worker in People and Money and to extend any Preboarding checklists.

Step 4c –Create Job Requisition in People and Money (for Advertised Roles)

A job requisition either should be created when there is a vacancy for an existing job (after an employee has left the university) or for a newly created job and advertising is required and approval to recruit has been provided. The creation of the job requisition requires various sections to be completed before the requisition can be submitted for approval. It covers everything you will need to do to set up the requisition and get this ready for advertising, the final section also gives you an opportunity to select pre-screening questions for use in the online application form (see supporting information below). There is also the ability to create an interview schedule prior to the requisition being fully approved, alternatively this can be created after the requisition has been approved, please see [Step 7c Interviewing](#) below for further details. A draft copy of the job requisition can be saved at any stage and completed later. The P&M user guide [‘How to create and maintain a job requisition’](#) will guide you through each of the sections. Once recruitment is concluded, the job requisition is linked to the successful candidate record in P&M. HR Operations and HR Systems can view this.

Role	Line Manager	Hiring Manager	School/Department Administrator	Business Approver	HR Operations
Process	<p>1)Create a job requisition completing sections 1-3 following the P&M User Guide ‘How to create and maintain a job requisition’</p> <p>Note - if the Line Manager is the same as the Hiring Manager they may also complete the rest of the requisition and submit for approval. If they are not, a Hiring Manager or SDA will complete the job requisition</p>	<p>1)Create or continue with the job requisition completing all sections following the P&M User Guide ‘How to create and maintain a job requisition’.</p> <p>When you reach Section 10 Configuration ‘Candidate Selection Process’ you can choose whether you will want to extend an offer letter via P&M or choose ‘Bypass Offer’ where an offer letter is not required. You should select ‘Bypass Offer’ if creating a requisition for a Secondment.</p> <p>Once you reach section 17e of the user guide save the requisition in draft before proceeding to the next step, taking a note of the requisition reference number.</p> <p>2)Save the Job Description to the Job Description Library SharePoint following the Guidance –</p>		<p>Once submitted the Job requisition will go through the approval workflow for the system and will go to the following for approval:</p> <ul style="list-style-type: none"> • Line Managers Manager (following up the hierarchy) • Finance manager • Head of School/unit (if it is an externally funded post then the approval chain stops here) • College (if it is a core funded post) 	<p>1)Upon receipt of the system notification ‘FYI Requisition <Job Title> <ReqNo>Requires Approval’ Follow the P&M User Guide ‘How to Advertise’ and the HR Operations Internal checklist ‘Checking a Job requisition Prior to Advertising’</p> <p>2)Update the requisition if notified by Hiring Manager/SDA</p>

	<p>(sections 4-10) and submit for approval.</p>	<p>Saving job descriptions to the job description library</p> <p>3) Once you have received the confirmation email containing the hyperlink to the Job Description, locate the draft requisition and copy and paste this link to the Posting Description. You must only use the link supplied within the email to avoid any access issues once the advert is live.</p> <p>4) In the Job Posting comments, ensure you note how long you wish the vacancy to be advertised for and where (e.g. S1 Jobs). You should also attach a copy of the approved Job Requisition Business Case form within the attachments section of the requisition. This will support HR Operations when they are checking the requisition before posting the advert to live.</p> <p>5) Submit for Approval – this will send a notification to the business approvers. You will only receive a notification once this has been fully approved (not after each approval step).</p> <p>To check where a requisition approval is sitting in the organisation hierarchy by reviewing the worklist from the notifications area of P&M. Anyone in the approvals chain can view where the requisition is. The person that raised it can see it in the Created by Me section whereas anyone in the approval chain can see the progress in the All section.</p>	<p>Once fully approved this will then send a notification to HR Operations for approval and posting.</p>	
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		<p>Follow the steps in the P&M user guide – How to view and respond to notifications for further guidance.</p> <p>HR systems can reassign requisition approvals if they get stuck.</p> <p>Note: Once it has been approved by all Business Approvers in the approval hierarchy the requisition will change to ‘job formatting in progress’ and a system notification will be sent to alert you this – at this stage it has been sent to HR Operations to check.</p> <p>At this point no changes can be made to the requisition, this can be requested by contacting HR Operations.</p> <p>Once it has been posted, the status changes to ‘Open-Posted’ and a notification will be sent to you.</p>		
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Supporting Information

- [P&M User Guide – ‘How to create and maintain a job requisition’](#)
- [Guidance – Before you create a job Requisition](#)
- [Advertising Guidelines](#)
- [Guidance for seeking academic references](#) – please refer to this if you are required to seek academic references as part of the recruitment and selection process.

Link to [Job Description Library SharePoint](#)

Cancellation of a Job requisition – (Not Posted)

If the job requisition has not been submitted for approval, it can be cancelled, and it will be deleted. If the job requisition has been submitted for approval, it can be cancelled prior to being advertised.

Cancellation of Job requisition (Job Posted) A job requisition has been created and advertised but needs to be cancelled, whether or not applications have been made. If candidates have applied to the job, they will be notified via email (manually using the interactions facility in the system) that the job requisition is no longer active.

Evaluation Criteria

Pre-screening questions and interview feedback questionnaires can be added to the job requisition when it is created. Pre-screening questions allow Hiring Managers and School or Department Administrative users to longlist and shortlist candidates.

The mandatory pre-screening questions are:

For External Applicants	For Internal Applicants
<ul style="list-style-type: none">-Are you a current student at the University of Edinburgh?-Please provide your student matriculation number (numbers only)-Are you currently working for the University in another capacity?-When could you start this role?-Have you worked for us before?-Do you currently have the right to work in the UK	<ul style="list-style-type: none">-Will this be your only assignment or will you hold another assignment alongside this one with us?-How many hours are you contracted to work in your other assignments with us?-When could you start this role? Which best describes your current employment situation?-Do you currently have the right to work in the UK?

Interview feedback questionnaires contain questions that can be used to collect feedback on candidates during interviews. **New pre-screening questions or interview feedback templates can be created by the HR systems team if required.**

Candidate Selection Process

When creating a new job requisition, a Hiring Manager or School/Department Administrator has to select a Candidate Selection Process (CSP) or request a new CSP to be created by the HR Systems Team if required. There is currently one CSP in the system, which takes the applicant through a set of phases and stages e.g. where they are in the recruitment process. The current CSP has one stage of interview. If an area wanted to have a two stage interview process in the system this could be added by HR Systems. The hiring manager or SDA can request a new CSP via an SR.

Step 5 – Advertise

This step describes the process of publicising a job requisition in order to receive applications either by candidates searching for a job on a career site or by other means such as being invited to apply or being referred. Advertising includes:

- [Advertising](#) an approved job requisition on a range of career sites, including the university’s internal, student and external career sites.
- Inviting candidates to apply for advertised jobs.
- Referring a candidate (internal and external)
- Recruitment Marketing campaigns

As part of our broader University wide strategy, all jobs posted on the [University of Edinburgh career site](#) are automatically advertised on LinkedIn and Indeed.

Role	Line Manager	Hiring Manager	School/Department Administrator	HR Operations	Resourcing Centre of Excellence
Process	When creating a job requisition (in step 4c above) select the appropriate job posting requirements following the guidance in the P&M User Guide ‘How to create and maintain a job requisition’ . HR Operations will post the job advert as per the posting requirements specified on the job requisition e.g. internal only, external (includes internal), student site only and on a specified time and date. Once the job has been posted by HR Operations the status changes to ‘Open-Posted’.			Once the checks in step 4c are finalised, post Advert to make it live in line with the posting and advertising requirements specified on the job requisition.	Campaign Recruitment Only Sends out a bulk email to internal and external candidates asking them to apply for a job, refer a friend/employee or to share a no. of job adverts and track the click-through/drop off rates.
<p>Supporting Information Guidance on the engagement of executive search agencies can be found on the Executive and Senior Search webpage</p> <p>Referrals Employees can refer another employee for a job or refer an external candidate (e.g. a friend). There must be a job advertised on the internal careers site in order for employees to refer another employee or a friend. The P&M User Guide ‘How to refer a candidate for a job’ provides further details. There will be no monetary reward for successful referrals.</p> <p>Campaign Recruitment (Recruitment Events/Job Fairs) This relates to all aspects of sending bulk emails to onternal and external candidates to notify them of a job advert posting or encourage them to refer an employee/friend.</p>					

Step 6 – Apply

This step describes the process of the overall online application process for Internal and External applicants. Internal applicants apply for advertised roles via direct access to People and Money. External candidates and students apply for advertised roles via the [external careers site](#). In exceptional circumstances a candidate can apply offline and can be added to the requisition by the HR Helpline.

It is important that an **internal candidate applies for any jobs via the internal careers site** and by the closing date of the vacancy. This can be accessed

through their direct access within People and Money by clicking on the ‘Current Jobs’ tile .

There is also access via the external careers site (clicking on  icon at the top right hand side of the screen titled ‘I am an employee’). Or by clicking the icon

Existing employee? Apply here (EASE login)

If a current employee submits an application via the external careers site, a message will appear at the move to HR phase stating a duplicate has been found. Their application can be merged to their internal record as part of the duplicate check, performed by HR Operations at the Hire stage. However, internal candidates should be encouraged to apply by using the Current Jobs app in People and money

After submission of their online application, candidates will receive emails and notifications (if internal) as they move through the recruitment process. A candidate may withdraw their application at any time and the Hiring Manager/school department administrator will be notified of this.

Role	Hiring Manager	School/Department Administrator	External Candidate	Internal Candidate	HR Helpline
Process	<p>The actions at this step of the process are typically on the side of the candidate making the application, at this stage you can:</p> <ul style="list-style-type: none"> -Review Applications and update the candidate phase and state accordingly, e.g. progressed through to longlisting or shortlisting, invite to interview, offer. -Reject unsuccessful candidates. Follow P&M User Guide ‘How to reject a candidate’. 		<p>1)Search for a job on the external careers site or job board, is matched to a job requisition, is referred by an employee or an agent submits an online application.</p> <p>2)Register on the external careers site which will allow them to view previous or open applications.</p>	<p>1)Search for a job on the internal careers site and apply for the selected role. The candidate will complete the internal application and will be prompted to review their ‘Skills and Qualifications’ (this will be blank unless the candidate has</p>	<p>Offline Candidates Upon receipt of a service request from the Hiring Manager or SDA create the candidate record and add the candidate to the requisition.</p>

	<p>-Withdraw applications if requested by the candidate, if the candidate has scheduled an interview, the interview is automatically cancelled.</p> <p>-Update Applications when the candidate has already submitted a job application accepting additional documentation to support their application. This would typically be in exceptional circumstances, e.g. technical issues. Any additional documentation can be uploaded in the 'Attachments' section of the candidate record.</p> <p>Offline Candidates – There may be exceptional cases when a candidate needs to be added manually to the requisition. See supporting information below for further details.</p>	<p>3)Completes the online application which consists of Personal Information, Job Application Questions (if selected at requisition stage by Hiring Manager), Experience, Education, More About You (CV and Cover Letter), Licenses and Certificates, Work Preferences, Languages, Sensitive Personal Information, Diversity Information and Opt In (to receive updates on job opportunities and marketing communications) and E Signature. Note that external candidates can upload a maximum of 10 attachments.</p> <p>4)Once submitted they will receive a confirmation email and the job application will be displayed against the requisition.</p> <p>Follow the P&M User Guide 'How to apply – External Candidate'. This guide is available within the How to Apply section of the Career site.</p>	<p>applied for a role in P&M previously).</p> <p>2)Completes the Job Application Questions (if selected at requisition stage by Hiring Manager), upload supporting documents and provide an E Signature.</p> <p>3)Once submitted the candidate will receive a notification and email to confirm and the job application will be displayed against the requisition.</p> <p>Follow the People & Money User Guides 'How to apply – Employee'</p> <p>'How to withdraw an internal application'</p> <p>These guides are available on the people and Money</p>	
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Supporting Information

Offline Candidates –With effect from 17th March 2021. In exceptional cases, where the online application process can't be followed, SDAs will no longer be able to add a candidate to a job requisition and will need to raise a service request in order to ask HR to do this. This may be the case where there are late external applications which the Hiring Manager wishes to consider in the shortlisting process. We expect internal candidates to apply by the closing deadline. If a Hiring Manager receives a late external application, they should consider whether the application meets the essential criteria for the role. If so the Hiring Manager/SDA should follow the process:

- In People and Money, click on 'Help desk' > 'service requests' > 'Create service request'. Choose category 'Applications'. Use 'Late application' along with the job requisition name and number in the title of your service request and include:
 - Applicant's name
 - Title
 - Source of application, eg: LinkedIn, email etc Email address and phone number
 - Their CV, as an attachment.

The service request will go to the HR Helpline team who will add the candidate to the job requisition. It will take up to 48 hours for the late application to be added.

External Candidates can update their **personal details** through the external careers site and this will display on their candidate record in ORC. Should they wish to submit further additional attachments they must email these to the Hiring Manager or SDA.

Internal Candidates can update their **personal details** via the Self Service transaction 'Update Personal Details' in People and Money. Should they wish to submit further additional attachments they must email these to the Hiring Manager or SDA.

Step 7 – Screen Applicants (Longlisting, Shortlisting and Interviewing)

Once the job advert closes an **automated shortlisting matrix** will be issued by email to the named recruiter on a job requisition. This is an excel template which prepopulates the names of all candidates and their responses to the standard pre-screening questions (e.g. Right to Work, Notice Period) into a shortlisting matrix. This matrix can then be used by the hiring team to score and record their sift outputs and decisions for selection/Non selection. The matrix will not pick up any manually added pre-screening questions at this time. It should be noted that any applications added to a requisition after the advert expiration date will need to be manually added.

The matrix will be sent to the named recruiter on the requisition by the following business working day (09:30am) after the job advert closes and this should be saved to the attachments section of the requisition. If for any reason this is not received, please raise a service request.

7a - Longlisting

This step describes the process of assessing candidate responses to pre-screening questions that were allocated at the Create Requisition Stage (4b) above and whether to progress them through to the next stage of the recruitment process (screening, shortlisting or interview) or reject their application. It is the initial sift of applications. This step can be bypassed if not applicable and you can move straight to shortlisting.

Role	Hiring Manager	School/Department Administrator	Collaborator	Candidate
	<p>Assess the candidate responses to pre-screening questions and progress them (or not) through to the next stage of the recruitment process. The next stage can be:</p> <ul style="list-style-type: none"> • Screening (e.g. telephone interview) • Shortlisting • Interview • Rejection <p>Follow the P&M user guides</p> <ul style="list-style-type: none"> • ‘How to review Candidates to Longlist or Shortlist’. • How to reject a candidate’. 		<p>Reviews applications and provides input into the longlist.</p> <p>Note a collaborator role can only be provisioned to someone at Grade 7 and above. You can request access by submitting a service request ‘Add Collaborator Role’</p>	<p>Receives a rejection email (or notification if internal) if unsuccessful at this stage.</p>
<p>Supporting Information</p> <ul style="list-style-type: none"> • Collaborators - Where a collaborator is a Grade 7 or above and is a line manager, they should already have the hiring app within People and Money. If an employee is a Grade 6 or below and not a line manager, and needs to be part of a panel, then you need to submit a service 				

request to 'Add collaborator role'. Once you have this access, select 'Interview' as the category and add 'Add to interview panel' in the title field. Please ensure you make this request as early as possible so it can be set up in advance of your interview panel meeting.

Non Line Managers who require Hiring Manager access should also submit a service request to have their access provisioned.

7b - Shortlisting

This step describes the process of reviewing candidate applications and any additional attachments to assess how well the candidate meets shortlisting criteria. Candidates who meet this criteria progress to interviewing and those who do not are rejected.

Role	Hiring Manager	School/Department Administrator	Collaborator	Candidate
Process	<p>Receive the shortlisting matrix by email (sent to named recruiter) and save a copy of the shortlisting matrix to the attachments section of the requisition, further guidance and an example shortlisting matrix is available on the Shortlisting Applications webpage.</p> <p>Assess the candidate application against the shortlisting criteria which should have been prepared in advance.</p> <p>You should also refer to the Redeployment Register at this stage.</p> <p>The candidate can then either be progressed to the next phase 'Interview and Selection' or rejected.</p>		<p>Reviews applications and provides input into the shortlist</p>	<p>Receives a rejection email (or notification if internal) if unsuccessful at this stage.</p>

	<p>Once the candidate has been moved to 'Interview and Selection' the state automatically updates to 'Interview to be Scheduled' and the Hiring Manager or SDA will receive a notification.</p> <p>Follow the P&M user guides</p> <ul style="list-style-type: none"> • 'How to review Candidates to Longlist or Shortlist' • How to reject a candidate' 		
<p>Supporting Information</p> <ul style="list-style-type: none"> • Collaborators – Where a collaborator is a Grade 7 and is a line manager, they should already have the hiring app within People and Money. If an employee is below a Grade 7 and not a manager, and needs to be part of a panel, then you need to submit a service request to 'Add collaborator role'. Once you have this access, select 'Interview' as the category and add 'Add to interview panel' in the title field. Please ensure you make this request as early as possible so it can be set up in advance of your interview panel meeting. 			

7c - Interviewing

This step describes the process of scheduling interviews for candidates successful at the shortlisting step above. It involves interview preparation and scheduling, sending email invitations, preparing documentation before the day of interview and collecting feedback from panellists after the interviews have taken place. Interviews can be face to face, via telephone or video call (using Zoom/Microsoft teams).

Role	Hiring Manager	School/Department Administrator	Interview Panel	Collaborator	Candidate
<p>Process</p>	<p>Preparation</p> <ul style="list-style-type: none"> • Book Rooms/Plan Zoom/Teams Call for interviews • Identify and book time for Interview Panellists • Prepare any Interview Documentation (e.g. maps of interview location, 		<p>Preparation</p> <ul style="list-style-type: none"> • Prepare the Interview questions to be asked, see the Interview Documentation webpage. • Review the Candidate CV and Additional Documentation from either the Outlook Invite or the Job Submission record in People and Money. 		<ul style="list-style-type: none"> • If the interview is candidate managed they will pick an available timeslot • If the interview is hiring team managed the candidate will be given a specific timeslot and

	<p>information on any asks of the candidate prior to or during the interview</p> <ul style="list-style-type: none"> • Seek references (if applicable) • Prepare Candidate CV's and any relevant documentation for the interview panel • To support Interview Panellists with the preparation of interview questions see the Interview Documentation webpage. <p>Scheduling Follow the P&M User Guide 'How to Schedule and Manage Interviews'</p> <ul style="list-style-type: none"> • Interviews can be set up as candidate led (where candidates select a time from a schedule themselves) or hiring-team led (where the hiring team issue in invitation to one interview slot). • All interviews should be created from a template before candidates are added. For hiring team led interviews please include a contact email address for candidates to respond to the invitation. This enables all standard information to be populated for all interviewees before the schedule is created or individual invites are sent. • The candidate's status must be changed by moving the candidate to the Interview Phase and 1st Interview Scheduled State once the invitations have been sent. • If the candidate cancels their interview and does not plan to reschedule, the state 	<p>On the Day of the Interview</p> <ul style="list-style-type: none"> • Interviews Shortlisted Candidates • Collect any additional documentation provided by the candidate • Completes the Interview Documentation <p>After the Interview</p> <ul style="list-style-type: none"> • Receives a notification to complete the interview feedback request in P&M 	<p>should respond by email to confirm attendance.</p> <ul style="list-style-type: none"> • Attends the interview and provides relevant supporting documentation • Receives a rejection email (or notification if internal) if unsuccessful at this stage. • Requests Additional Feedback if unsuccessful • Attends additional interview if required
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	<p>should be updated to Withdrawn by Candidate.</p> <ul style="list-style-type: none"> • For hiring team led interviews the state should be manually updated once the candidate confirms whether they are going to attend. • Uploads all required documentation for the interview to the job submission record or send to the interview panel outlook calendar invites. <p>On the Day of Interview</p> <ul style="list-style-type: none"> • Collect any additional documentation provided by the candidate <p>After the Interview</p> <p>Requests interview feedback from the interview panellists using P&M. They will receive a notification when the feedback has been completed by the panel.</p> <p>Follow the P&M User Guides</p> <ul style="list-style-type: none"> • ‘How to Upload Interview Documents’ • ‘How to Request Interview Feedback’ • Provides Feedback to unsuccessful candidates • Set Up additional interview as required • You should also refer to the Redeployment Register upon completion of interviews and before you make any offer of employment. 		
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<p>Supporting Information</p> <ul style="list-style-type: none"> • Academic Selection Toolkit

- **References** Some roles require the Hiring Manager or SDA to obtain references for the interview process. References can be requested by email, using the [standard reference request template](#). P&M will generate a report to provide reference details to recruiters named on a job requisition. The report is automatically generated for candidates that are set to the interview or offer phase and a fresh report is sent twice weekly at 8am. Once the references have been obtained you can add these to the candidate's record – follow the P&M user guide '[How to add references to a candidate record](#)'. If the candidate is successful you will need to upload the references to SharePoint as part of a pre-boarding task (Step 11). There are situations where individuals are named on grants so references are not requested, as approval of the person is part of the grant application. This is not an issue from a system perspective.
- **Interview panel includes external (non employee) panel members** - To allow them to view any applications you should download the CV, Cover Letter and any other attachments. For other information contained within the application (e.g. answers to pre-screening questions) you will need to take a screen shot of this.
- **Batching of candidate CV's and documents** - Currently there is no batching functionality in P&M, documentation will have to be accessed individually.
- **Collaborators** - Where a collaborator is a Grade 7 and is a line manager, they should already have the hiring app within People and Money. If an employee is below a Grade 7 and not a manager, and needs to be part of a panel, then you need to submit a service request to 'Add collaborator role'. Once you have this access, select 'Interview' as the category and add 'Add to interview panel' in the title field. Please ensure you make this request as early as possible so it can be set up in advance of your interview panel meeting.
- **Interview Expenses** - Candidates may be eligible to claim Interview Expenses, further information is available on the [Interview Expenses](#) webpage
- **Right to Work Documents Required** – information is available on the [Right To Work Checks – Who and What](#) webpage

Step 8 – Make an Offer

This step describes the process of making an offer of employment to the successful candidate(s) following the selection process. Offers of employment are typically made verbally in the first instance by the Line Manager or Hiring Manager, and followed up with a written offer letter, using the offline interim process. **For non advertised positions** the offer letter should also be extended offline.

Right to Work in the UK

The University has a legal obligation to ensure that we hold Right to Work (RTW) documentation for all new starts before their first day. Failure to do so means that there is the potential for the University to employ an illegal worker. The penalty for this is £20,000 per illegal worker. To ensure we hold the necessary RTW documentation before an individual starts work, under usual circumstances this is taken at interview. During Covid, the check is undertaken for successful candidates at the earliest opportunity after interview. This allows the documentation to be reviewed as part of the offer process and ensures that any necessary action, e.g. undertaking a UKVI employer check or resolving issues with the documentation, is carried out prior to the person starting work. If the individual you wish to make a job offer to does not have a current entitlement to work in the UK, the University may be able to apply for a certificate of sponsorship to employ the individual. Further advice is available from HR Services who will make this application for you. Information is also available on the [Obtaining a visa to work](#) webpage.

With effect from 29th March 2021 an interim process for issuing an offer letter has been introduced. This has been included in the guidance below, further information is available [Job Offer – Interim Solution](#).

Role	Line Manager	Hiring Manager	School/Department Administrator	HR Operations	HR Advisor/ HR Partner	Candidate
Process	<p>Prior to making an offer you should also refer to the Redeployment Register.</p> <p>1)Line Manager/Hiring Managers. Make a Verbal offer to the successful candidate, reinforcing at this stage that any offer is subject to the candidate demonstrating their right to work in the UK/having the necessary visa to take up the job offer. It is also subject to satisfactory references being obtained and where applicable additional pre employment checks for the role (e.g. PVG check). This should also be included in the offer letter created for People and Money, using the offline interim process (point 2) below.</p> <p>Setting a reasonable start date should also be considered if a visa application is required. In the case of a University sponsored visa, it can take up to 9 weeks for the complete process. i.e. from requesting and assigning the Certificate of Sponsorship to the visa being granted.</p>			<p>Upon receipt of the P&M Notification ‘Action required: Job Offer Requires Approval’:</p> <p>1)Carry out the ‘Before Offer Check’ process following the P&M user guide ‘How to Conduct Job Offer Checks’</p> <p>Escalate any issues to the HR Partner.</p>	<p>Provide advice and guidance on progression of offer if HR Operations raise an issue with the ‘Before Offer Check’.</p>	<p>Provide evidence of Right to Work in the UK.</p> <p>Accept, Reject or Negotiate Job Offer</p> <p>Internal Candidates will receive a notification that a job offer has been extended.</p>

	<p>2) Request Right to Work Documents from the successful candidate(s) and conduct the appropriate Right to Work Checks upon receipt.</p> <p>3a) Draft the Offer Letter using the appropriate offline template including the relevant 'subject to' clauses applicable to the job. Consideration must be given as to whether the person you are offering the position will require an ATAS certificate, (sponsored employees, i.e. those on Skilled Worker/Tier 5 sponsored researcher visa, and visiting researchers). Inclusion of this information in the offer letter is important (and is provided on the templates). Further details of this can be found on the following webpage - https://www.ed.ac.uk/human-resources/international-staff-work-uk/additional-permission-work/university-sponsorship/skilled-worker.</p> <p>3b) If applicable issue the supplementary ATAS letter to the candidate advising them of the next steps they need to follow.</p> <p>4) Follow the P&M User Guide 'How to Create and Manage a Job Offer' and complete all sections of the 'Create Job Offer' grid. Submit for approval to HR Operations. Note that the action reason for an internal secondment is 'Add Assignment'.</p> <p>Note that the offer letter must be drafted offline and should include relevant subject to clauses applicable to the job. Subject to clauses are the pre employment checks that the candidate must satisfy in order to be successfully appointed to the role. The standard offer letter templates are available.</p> <p>The Offer letter and Job Description must be attached within the 'Attachments' section with the candidate facing documents area.</p>	<p>2) Check the attachments (offer letter and job description in candidate facing documents) and Approve or Reject the Offer in P&M. (This then sends a notification to the SDA/Hiring Manager to extend the offer).</p> <p>Note - HR Operations can re-advertise the job requisition if the appointable candidate rejects the offer and there is no reserve candidate (at the request of the Hiring Manager or School/Department Administrator).</p>		<p>External Candidates will receive an email to alert them to the job offer.</p>
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<p>SDA/Hiring Manager - The Job Requisition Business Case form can be added at this stage to the 'Internal Documents' attachments section – this will enable this to be saved to the Document Record once the candidate is hired.</p> <p>5)Await Notification of Approval or rejection from HR Operations.</p> <p>'Approval Rejected' notification received - you will need to redraft the offer and resubmit to HR Operations.</p> <p>'Offer Approved' If the offer has been approved by HR Operations you will receive a notification and you will need to extend the offer to the candidate, following the details in the P&M User Guide 'How to Create and Manage a Job Offer'</p> <p>This offer validity depends on the expiration date set on the offer grid, it is advised that this is no longer than 30 days and reminders are sent to the candidate at regular intervals.</p> <p>You will receive a notification of the offer acceptance, rejection or if the candidate wants to negotiate the offer. Any offer negotiations are carried out offline. You should redraft the offer if the candidate has successfully renegotiated.</p> <p>Once the offer has been accepted and the 'Move to HR' step has been performed (See step 10 Hire) the offer documentation automatically saves to the individuals Document of Records.</p> <p>If there is not a successful candidate the job can be re advertised by contacting HR Operations by raising a service request enquiry.</p>			
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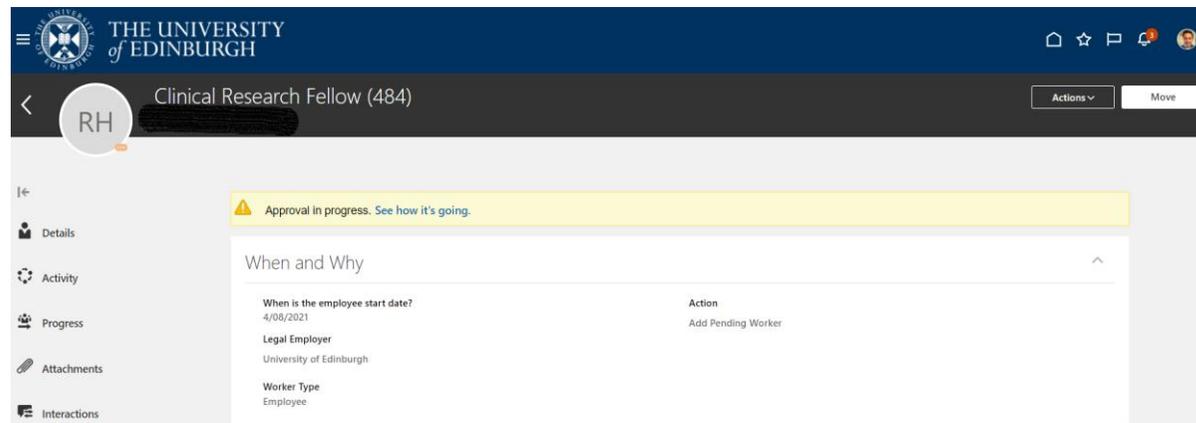
Supporting Information
Guidance for [Job Offer Interim Solution](#)

Here is the suite of [standard offer letter templates](#).

Tracking Job Offer Approval

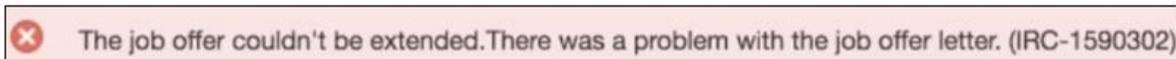
Job offer initiators, approvers, and observers can track how job offers are moving through the approval process by viewing banners displayed on the job application's Details and Offer tabs. Job offer initiators and approvers can also click the “see how it’s going” link on these banners to get more details, such as viewing the whole offer or seeing who the next approver in line is. They can also take actions on the offer such as approving it or withdrawing it from approval. Banners are displayed when:

- An offer is submitted for approval.
- An offer approval is underway.
- An approver requested more info about the offer.
- The offer initiator needs to provide more info about the offer.



Offer Approval in Progress Banners are also displayed on the job application's Details and Offer tabs when:

- An offer is extended.
- An offer will be extended at a certain point in the future, if the selection process is configured to automatically extend job offers.
- There are any issues while trying to extend an offer.
- There are any issues while using the Move to HR action.



The Before Offer Check Process covers on system steps and also a series of offline checks, namely

- Check to confirm if the candidate has been previously employed by the University and if so are they recommended for rehire (including settlement agreements)
- Check hours of work do not exceed any visa restrictions or work hours limit for student work hours
- Check Right to Work documentation

Information for candidates regarding ATAS requirements can be found on the [University Sponsorship](#) webpages.

Step 9 - Pre Employment Checks

This step describes the process for and obligation of Line Managers to carry out the appropriate pre employment checks for new hires and rehires. This must include checking the candidate's Right to work in the UK and obtaining references. There may be other specific pre employment checks that need to be carried out and this is dependent on the job the successful candidate will be doing. This should have been outlined to the candidate at the offer stage, examples are Protection of Vulnerable Groups (PVG) check, proof of a satisfactory Disclosure check or Specialist GMC registration.

Right to Work checks should be carried out as soon after interview as possible and this is covered in [Step 8 -Make an Offer](#).

Other Pre Employment Checks are typically carried out off system and therefore can be carried out in parallel with the next on system steps of ['Hire' \(Step 10\)](#).

Role	Line Manager	Hiring Manager	School/Department Administrator	HR Operations	Candidate
	<p>Right to Work If not completed already request Right to Work Documents from the successful candidate(s) and conduct the appropriate Right to Work Checks upon receipt.</p> <p>References – Two written references are required, one must be from the candidates most recent employer. For Academic staff, the second reference can be from someone else directly involved in the candidates' field from a different institution.</p> <p>To enable the process of gathering references, P&M will generate a report to provide reference details to recruiters named on a job requisition. The report is automatically generated for candidates that are set to the interview or offer phase and a fresh report is sent daily at 8am. References can be requested by email, using the standard reference request template.</p> <p>Please submit a service request to HR Operations for support with all Certificate of Sponsorship requests, PVG/Disclosure Checks (for CSE and CAHSS only).</p>			<p>HR Operations will receive an SR to support the following processes where applicable:</p> <p>Certificate of Sponsorship</p> <p>PVG & Disclosure & Home Country Criminal record Check (CSE and CAHSS only). Other areas are supported locally.</p>	<p>Provides supporting information to support pre employment checks needed for their role.</p>
Supporting Information					

- Further information on the types of roles the University can sponsor and the UKVI criteria can be found on the [University Sponsorship webpages](#)
- Tier 5 Sponsored Researcher Certificate of Sponsorship Application Form is held on the [Tier 5 Sponsored Researcher webpage](#) under the section 'Requesting a Certificate of Sponsorship'
- Skilled Worker Certificate of Sponsorship Application Form is held on the [Skilled Worker webpage](#) under the section 'Requesting a Certificate of Sponsorship'
- [University of Edinburgh Staff Immigration Service](#)

Step 10 – Hire

This step describes the process once the candidate has accepted the job offer and involves creating their record in P&M. This step should be completed as soon as the acceptance is received to allow for preboarding and onboarding activities to commence. This process applies to all new hires and rehires and also includes internal candidates who are transferring to a new role, taking on an additional post or an internal secondment. Full details of preboarding and onboarding activities are detailed in [step 11](#) onwards.

The type of hire will determine the process steps to follow and these have been split between Advertised Posts and Non Advertised Posts and whether the hire is new to the university, a rehire or is an existing employee (transfer, additional post or internal secondment). This process applies to all types of hire including those taking up a Guaranteed Hours, Annualised or Fractional Contract.

Incoming secondments (from an external organisation) will largely be handled in the same way as any other recruitment. In most cases they will apply to job and are appointed but issued with a secondment agreement instead of an employment contract. An HR Advisor/ HR Partner should be involved at an early stage for this scenario. Further information is available within the [Secondment Policy](#). Any external incoming secondments that are not being paid by the university should be set up as a contingent worker in the system.

10a - Advertised Posts through People and Money

Role	Line Manager	Hiring Manager	School/Department Administrator	HR Operations	Candidate
New Hire/Rehire or External Incoming Secondment paid by UoE.	1)Once the Offer has been accepted, update P&M to move the candidate to HR for processing following the P&M User guide ' How to hire an external candidate ' The candidate will become a 'Pending Worker' once this step is complete.			Review any duplicate notifications and merge the record where appropriate.	

	<p>Duplicate Record Check</p> <p>If the system identifies a duplicate record when processing the status of the record will be updated to 'HR error during processing' and HR Operations will be notified.</p> <p>Once HR Operations have reviewed and merged the duplicate records the offer will move back to draft. You should review the previously entered offer details by selecting 'Edit Offer'. Please select the appropriate internal action (e.g. Add assignment; transfer) and submit.</p> <p>You will then receive a message 'The offer for the candidate not retained in the merge was already moved to HR'. You can bypass this process now for the candidate and move directly to HR.</p> <p>Click Yes and this will avoid another offer being sent or approvals being required. This will then move the candidate to HR Operations.</p> <p>2)If a Rehire, you must assign the Generic Pre-boarding Checklist following the P&M user guide 'How to allocate checklists and tasks'.</p> <p>The pending worker will become an employee on their start date.</p> <p>There is also the ability to 'Quick Convert' a pending worker straight through to Onboarding if the candidate has already started employment.</p>		
<p>Internal Transfer/Additional</p>	<p>1)The candidate will move to HR automatically upon acceptance of the job offer.</p>	<p>Receive FYI Notification - 'Assignment is complete for</p>	

<p>Post/Internal Secondment</p>	<p>2) You will receive a notification once HR Operations have actioned this request and approved or rejected this. Assign the Internal Moves/Additional Posts Checklist following the P&M user guide 'How to allocate checklists and tasks'.</p> <p>3) Proceed to Step 10 'Preboarding'</p> <p>If a current employee applies for an advertised position via the external careers site with their personal email address, rather than the 'Current Jobs' tile in P&M, the system will flag this as part of the duplicate record check noted above.</p>	<p>[candidate name] for job offer [job title]'</p> <p>Check the 'Manage Job offer' tile in P&M for new requests</p> <p>Follow the 'P&M user guide 'How to Hire Internal Candidates and Secondments'</p> <p>Note for Internal Secondments HR Operations must update the record of the employees substantive post accordingly (e.g. either suspended or hours reduced).</p>	
<p>Supporting Information Other HR Operations P&M User Guides</p> <ul style="list-style-type: none"> - How to rehire an employee - How to key an employee direct into People & Money <p>Preboarding Checklist Provision A generic preboarding checklist is only automatically assigned to incoming employees (pending workers) that have not worked for the University before (New Hires). For rehires, internal transfers, additional posts and secondments the relevant checklist will need to be manually assigned. Further information regarding this is available in the section below 'Checklists and Tasks'</p> <p>A copy of the JRBC can be attached the candidates Document Record, this can be added manually following the P&M User Guide How to search, view and upload employee data'</p>			

10b - Non Advertised Posts

Role	Line Manager	Hiring Manager	School/Department Administrator	HR Operations	Candidate
<p>New Hire/Rehire or External Incoming Secondment paid by UoE</p>	<p>To create a pending worker record for non advertised posts you should follow the steps below:</p> <p>1)Send the Appointee Information Form (AIF) to the candidate for completion (offline).</p> <p>2)Manually create the pending worker record following the P&M user guide 'How to Add a Pending Worker', the Job Requisition Business Case form should be attached to provide evidence of budgetary approval.</p> <p>During this stage in the process a duplicate check is performed to highlight if the pending worker is a current employee or may have worked for the UoE before, this is based on the Name and National Insurance number of the candidate. If the hire has indicated that they have been previously employed by the university but has not provided a National Insurance number, or no duplicate is found when the duplicate check runs please raise a service request before proceeding.</p> <p>At this point schools should now get a warning message stating that a duplicate has been found. LM and SDA continue with the pending worker and HR Ops can then merge the external candidate record with the employee record which then enables internal actions to be selected, eg: add assignment; transfer.</p> <p>Ensure that when following the 'Add pending Worker' process that:</p> <ul style="list-style-type: none"> - Preferred Name field should be added as per their 'First Name' 			<p>Review the notification 'Add Pending Worker' and conduct Before Offer Checks.</p> <p>Check Job Requisition Business Case form is attached to the request</p> <p>Approve or reject the 'Add Pending Worker Request'</p>	<p>Completes the Appointee Information Form (offline) and returns to the requestor.</p>

	<p>-You add the personal email address of the candidate to the work email and personal email fields</p> <p>-UoE Group has been added under the payroll section – this will prevent issues with the candidates not being able to add their bank details (and prevent them from being paid).</p> <p>Follow the instructions in the ‘How to add a pending worker’ user guide (section 14, page 2 and section 13, pages 15-16); specifically:</p> <ul style="list-style-type: none"> • In the ‘Payroll Details’ section, set the ‘Tax Reporting Unit’ to ‘University of Edinburgh’. • Then, click the ‘Add’ button against ‘Payroll Frequency’ and select ‘UoE Group’ under ‘Payroll’. <p>- the Position code has been added</p> <p>- the Fixed Term reason code and that it has Fixed Term is added in Assignment Category</p> <p>3)Once submitted HR Operations will receive a notification for them to review and approve and then the candidate becomes a ‘pending worker’. You will receive a notification once HR Operations have approved or rejected this. The pending worker will become an employee on their start date.</p> <p>4)If a Rehire, you must assign the Generic Pre-boarding Checklist following the P&M user guide ‘How to allocate checklists and tasks’.</p> <p>There is also the ability to ‘Quick Convert’ a pending worker straight through to Onboarding if the candidate has already started employment</p>		
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<p>Internal Transfer/Additional Post/Internal Secondment</p>	<p>1) Complete the 'Request for Transfer, Additional Post or Internal Secondment' form (available from the HR A-Z forms webpage) and submit to HR Operations by submitting a service request, the Job Requisition Business Case form should be attached to provide evidence of budgetary approval. Please ensure you have reviewed the work schedule and provided this within the form.</p> <p>-For Additional Assignments raise the SR under the category 'Enquiry> Amendment to Employee Record'.</p> <p>-For Internal transfers or Internal Secondments raise an SR under the category 'Forms>Internal Transfer to Non-Advertised Post'.</p> <p>2) Once you have been notified of completion of the service request you must assign the Internal Transfer/Additional Post Checklist following the P&M user guide 'How to allocate checklists and tasks'.</p> <p>You should allocate a checklist but there will be no need to complete the 'request contract task' as HR Operations will issue the contract upon receipt of the service request.</p> <p>A copy of the Contract / Internal Secondment Letter can be viewed in Document Record once issued by HR Operations.</p>	<p>Review the service request and follow the appropriate P&M user guide: 'How to Hire Internal Candidates and Secondments'.</p> <p>'How to Process an Internal Transfer'</p> <p>'How to add an Assignment for an employee (excluding secondments)'</p> <p>For Internal Secondments only complete the letter confirming the secondment details and send to the employee.</p> <p>Upload a copy of the letter to Document Record and update the record of the employees substantive post accordingly (e.g. either suspended or hours reduced).</p> <p>Generate Contract for Additional Post/Internal Transfer (See Section 11b for further details)</p>	<p>Review the contract</p> <p>If secondment – review the confirmation letter</p>
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Supporting Information

Other HR Operations [P&M User Guides](#)

- How to rehire an employee
- How to key an employee direct into People & Money

Preboarding Checklist Provision

A generic preboarding checklist is only automatically assigned to incoming employees (pending workers) that have not worked for the University before (New Hires). For rehires, internal transfers, additional posts and secondments the relevant checklist will need to be manually assigned. Further information regarding this is available in the section below '[Checklists and Tasks](#)'

Step 11 – Preboarding including Access to P&M and Request for Contract

This step describes the preboarding activities you need to do from the point the successful candidates record is created in P&M and up until the start date of the post. Along this timeline there are important milestones, they are:

- Allocating appropriate pre boarding checklists and tasks to the candidate and those within the university involved in the preboarding process.
- Issue of login details to P&M in to allow the new hire to view and complete preboarding tasks (see Access to People and Money section below for further details).
- Requesting, generation and acceptance of an employment contract – without the allocation of the appropriate checklist this cannot be requested.
- First Day Arrangements.

Step 11a - Access to People and Money

1. Once a pending worker record is created, P&M automatically sends an email to the pending workers email address stating that their user account has been created. The email will prompt them to set a memorable password and provides details how to access preboarding tasks within P&M.
2. To log in to P&M and view their preboarding tasks the new hire should use their email address and password as set up in step 1. Please note that this is a temporary login and is **only accessible until the pending worker reaches their start date** and becomes an employee. From this point, access to P&M will be via single sign on using their UUN login (see table below). All outstanding preboarding tasks will be carried forward.
3. HR Systems receive a daily report with all newly added pending workers. They use this report to send a “welcome email” advising the new hire of their joining instructions and steps they need to take.

4. **Once a pending worker becomes an employee (on their start date) they will need to access P&M via single sign on using their UUN. It is the Line Manager/SDA responsibility to provide their new employee's initial password to the new start on day 1 of employment. The initial password for day 1 is provided by ISG or the local computer rep.** The IS Helpline can provide advice on how to obtain a UUN if this is unknown. The [Your University Login](#) webpage provides responses to frequently asked questions regarding logins. The P&M user guide '[How to log in and out of People and Money](#)' provides further details. Any additional access to UoE systems specific to role should be requested by SDA's/Line Managers as per local arrangements ahead of their start date.
5. **Existing employees** (transfers and additional posts) will receive a system notification and email to their UoE email address once a preboarding/onboarding checklist is allocated to their record.
6. **Students** who have been offered employment with the university (e.g as a Tutor or Demonstrator) will receive a separate staff login, which can be used for the People and Money system once their position is confirmed. This is issued by their local ISG contact in line with normal University practice and will be confirmed by their line manager or the local SDA. Student Tutors should be reminded to use this login and not their student login, otherwise People and Money single sign-on will not work. This will require them to sign out of their University login if they are logged in with their student credentials. They can continue to use their student login for any other University of Edinburgh resources they need to access.
7. Upon the start date there is an automated process which replaces the individual's personal email with their ed.ac.uk work email.

The table below summarises the log in process.

Category	Before day 1	On start date
New hire (not worked for UoE before)	Use personal email and password	Use staff UUN and password provided by SDA's/Line Managers as per local arrangements
Student	Use personal email and password	Use staff UUN and password provided by SDA's/Line Managers as per local arrangements
Rehire	Use personal email and password	If rehire left the university after April 2020 then use previous UUN which will be reactivated on day 1. Note a new password may be required.

		If rehire left the university before April 2020 the rehire will be provided with a new UUN and password.
Existing employee	Use current UUN and password	Use current UUN and password

Step 11b – Allocation of Checklists and Tasks

P&M holds a number of pre defined checklists. A checklist is a group of tasks that need to be worked through, either at the preboarding stage (between offer acceptance and start date) or onboarding stage (in first 90 days of employment).

Checklist templates have been created to group the most frequently used tasks together. The content of the checklists can be viewed in the Appendix of the P&M user guide '[How to allocate checklists and tasks](#)'.

- **New Hires** will have the Generic Pre Boarding Checklist allocated to them automatically as soon as they become a pending worker in P&M.
- **Rehires - SDA or Hiring Manager must manually assign the Generic Pre-boarding Checklist** following the P&M user guide '[How to allocate checklists and tasks](#)'.
- **Transfers or Additional Posts must have the Transfer checklist manually assigned to them.** It should be noted that when a checklist is assigned to a current employee the checklist tasks will only become available to the employee on upon the date of transfer. For future dated transfers the checklist will always be assigned to the individual's primary assignment contacts (Line Manager/SDA). It is for this reason it is recommended that you do not assign the checklist until the individual has confirmed that they have made their substantive line manager aware of their new assignment. Tasks can be reassigned accordingly to the appropriate performer.
- **Internal Secondments** - there is not a specific checklist currently for internal secondments, the Internal Moves/Additional Posts Checklist can be allocated in order to request the contract (letter to confirm secondment).
- The trigger for manually allocating checklists would be when the job offer team receive the notification 'Assignment is complete for [candidate name] for job offer [job title]. **Failure to manually allocate a preboarding checklist will result in no contract request being completed; no contract created or updated to legacy Oracle. This could lead to payment issues for new staff.** SDAs can now allocate checklists to employees who are transferring from another school/department.

The table below describes the checklists available for use in P&M.

Checklist Name	Description	Auto or Manual Provision
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Enterprise Onboarding Checklist (This includes the Generic Preboarding checklist and the Day 1-90 Onboarding Checklist)	The generic preboarding checklist is automatically provisioned for new hires once they become a 'pending worker' in P&M. The Day 1-90 checklist is automatically provisioned from the new hires start date. For rehires, this must be provisioned manually.	Automatic (for new hires only)
NHS Honorary Cover	Checklist to be manually assigned for roles that require NHS honorary cover.	Manual
Sponsorship Checklist	Checklist for International new hires requiring sponsorship. Once person is onboarding, as soon as you know they need sponsorship the SDA/ Hiring manager should allocate the checklist. Further guidance is available on the Obtaining a visa to work webpage	Manual
Health Job Hazard Checklist	Checklist for roles that required a health risk assessment including, but not limited to Animal workers, Laboratory Managers/Technicians/workers, Night workers, Workshop staff, Principal Investigators/Research Group Leaders, Cleaners, Maintenance staff and Swimming pool maintenance staff. Local risk assessments must be used to identify any other applicable jobs.	Manual
Relocation Support Checklist	Checklist for new hires requiring relocation support. This can be allocated as soon as the person record is completed. Further guidance is available on the Relocation webpage	Manual
Internal Moves/Additional Posts	Checklist for internal transfers or those taking on an additional post, this can include Internal Secondments	Manual

	Line Manager	Hiring Manager	School/Department Administrator	HR Operations	HR Systems	Internal Candidate (Transfer, Additional Post or Internal Secondment)	External Candidate (New Hire or Rehire)
Process	1) Review existing checklists and agree on appropriate checklist and task assignment. The content of the checklists can be viewed in the			Receive Notifications (and reminders) and Action any tasks as appropriate.	Send the welcome email that includes the temporary log in details	Receives a notification and email with	Receives an email (and reminders) with instructions

	<p>Appendix of the P&M user guide 'How to allocate checklists and tasks'</p> <p>2) In P&M manually assign the appropriate checklists to re-hires, transfers, additional post and secondments and any additional checklists e.g. NHS Honorary Cover Checklist to new hires.</p> <p>3) Receive Notifications (and reminders) and Action any tasks as appropriate.</p> <p>4) Review outstanding tasks allocated to the candidate, for example it's important to check and remind the candidate to submit their bank details and update all personal details which is essential for Payroll and Pensions. These can be viewed in 'Others Incomplete Task section'</p>		<p>to new hires and re-hires to enable access to preboarding tasks.</p>	<p>instructions on preboarding tasks to complete on day one of transfer.</p> <p>P&M user Guide 'How to Access and Action Checklist Items'</p>	<p>on preboarding tasks to complete e.g. upload a copy of P45, enter bank details, complete HESA information and update personal and emergency contact details.</p> <p>On the start date of the employee an onboarding checklist will be provisioned.</p> <p>P&M user Guide 'How to Access and Action Checklist Items'</p>
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Supporting Information

- There may be individual tasks that need to be assigned in addition to these checklists. Tasks can be added which are not covered by those in the task library and this process is outlined in the P&M user guide '[How to allocate checklists and tasks](#)'.
- Reassignment of Tasks - There may be a requirement to reassign certain tasks within the checklist, details are available in the P&M user guide.
- New checklists and tasks which are frequently required but not covered by an existing checklist template or task (as outlined in the appendix) can be requested by raising a service request to HR Systems.

- Reminders to complete tasks are sent regularly (see appendix within the user guide) and notifications are sent to the appropriate people to confirm that these have been completed. Incomplete tasks get reminders but we also have a day 1 task to remind employee to add bank details.

Step 11c – Request Contract

The Request for Contract is a task within the Generic Preboarding and Internal Transfer/Additional Post Checklists. This task must be completed as this alerts HR Operations that a contract of employment should be issued to the successful candidate. As a guide you should aim to submit the request at the earliest opportunity and no later than 2 weeks before the start date, this will allow time for HR Operations to generate and issue the contract and for the candidate to review. This task can also be used to request that an internal secondment letter is issued. This task is also a prompt for HR Operations to add the work schedule to the record of the new start.

A contract of employment must be issued for all new hires, rehires, transfers and additional post appointments. Contracts will be issued once RTW checks have been satisfied and evidence uploaded to documents of record. Contracts can be generated with subject to clauses where other pre-employment checks have not been fully completed.

The university has a legal obligation to ensure a contract is received by the appointed candidate by day one of employment

Internal Secondments will receive a letter to confirm their secondment arrangements (similar to a job change letter).

	Line Manager	Hiring Manager	School/Department Administrator	HR Operations	Candidate
Process	<p>1)Before you start</p> <ul style="list-style-type: none"> Ensure evidence of Right to Work Checks have been uploaded to documents of record and the task marked as complete in the preboarding checklist (not required if internal transfer, additional post or secondment). Agree a start date Agree the work schedule (working pattern) that should be assigned to the employees record. This is applicable to all types of hire, every employee must have a work schedule attached to their record and for each assignment they hold with the university. <p>The Guide to Work Schedules provides more information. The work schedule calculator can be used to generate a work schedule. This should be used to ensure the schedule is in the correct format for entry into People and Money.</p> <p>2)Open the request Contract task for the relevant hire</p> <p>Follow the P&M user guide 'How to Request Contract Generation' and update all fields, ensure that you provide the Work Schedule and Start Date.</p>			<p>1)Receive a Notification 'Action Required: Add Work Schedule and Upload contract to Document of Records Allocated for xxx</p> <p>2)Follow the P&M User Guide How to generate and amend a contract of employment</p> <p>3)Add the Work Schedule following the P&M user guide 'How to assign a work schedule to an employee's assignment'</p> <p>If there is not a suitable work schedule available for use this can be requested by raising a service request to HR</p>	<p>Receives an email or if internal a notification from P&M that the contract is ready to review, this will also be available to them within their allocated preboarding tasks.</p> <p>The candidate should download a copy of the contract to e-sign and accept as per details in the email/ notification.</p> <p>If an Internal Secondment they will</p>

<p>Note it is important to complete the status of all applicable pre employment checks in this task as this notifies HR Operations on the inclusion of any subject to clauses in the contract.</p> <p>If an Internal Secondment please provide details in the comments section of the request for contract task if not returning to substantive post at the end of the secondment period.</p> <p>If a Guaranteed Hours Contract, please provide in the comments section of the request for contract task: GH Start Date, GH End Date (this will be the date of GH refresh or the FTC end date if the contract ends on or before the refresh) Number of Hours being offered for the GH period.</p> <p>The appendix of the user guide for this process details all of the fields within this task and the options available to you.</p> <p>3)Select Complete to submit this request to HR Operations.</p> <p>4)When the contract is issued a system notification will be sent to all members added to the offer team.</p> <p>5)When the candidate accepts the contract the Hiring Team will be notified</p> <p>6)If the contract is not acceptable to the candidate they should discuss this offline, any changes should be notified via SR to HR Operations who will update P&M accordingly and regenerate the contract.</p> <p>Change of Start Date - If a start date needs to change this should be notified to HR Operations by service request as soon as possible and a revised contract will be issued.</p>	<p>systems – Forms>Interim Forms>Add a new work schedule</p> <p>4)Once the contract has been generated and checked against the request this can be issued to the candidate. You should upload the contract to the Document Record file and complete this task, this will trigger the task for the candidate to view their contract.</p> <p>5)Action any changes as a result of renegotiation or change of start date as notified by the Hiring Manager or SDA. This will result in a new contract being issued.</p> <p>For Internal Secondments only generate the letter confirming the secondment details and send to the employee. Upload a copy of the letter to Document Record.</p>	<p>receive an email from HR Operations with the confirmation letter.</p>
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Supporting Information

[Conditions of Service](#)

[Contract Types](#)

Step 12 - Onboarding

Once a new hire's start date is reached their record on P&M converts from a pending worker to an employee (for new hires and rehires).

The Onboarding period is between day one and day ninety of employment. The onboarding checklist will be provisioned on day one of employment and contains tasks to signpost the new employee to information to support a successful induction. It is also a prompt to the new employee to check and update personal and emergency contact details.

The Line Manager will be asked to confirm if the employee does not start or take up the post ([see Step 13 Cancel of Hire](#)) and will also receive a notification to remind them that the probation review is approaching. Any incomplete tasks that were allocated in the preboarding step will carry over and remain incomplete until action is taken.

Further guidance is available on the [Onboarding and Induction webpage](#).

During the onboarding stage it may be necessary to complete some final document checks where a contract has been issued with a subject to clause (e.g. Disclosure/PVG/ References).

	Line Manager	Hiring Manager	School/Department Administrator	HR Operations	Employee
Process	1)Receive Notifications (and reminders) and Action any tasks as appropriate. 2)Review outstanding tasks allocated to the candidate, you can issue reminders to the candidate if required. In order for a new employee to be paid they must complete the following tasks on P&M: - 'Upload P45 or complete HMRC New Starter Checklist' - 'Getting Paid – Enter Bank Details' 3)Check and Upload any outstanding RTW documents for sponsored workers to Documents of Record. 4)Upload any references obtained to SharePoint for employee			Complete all allocated tasks Support with any ongoing Pre Employment Checks, e.g. PVG registration	1)Complete all allocated tasks including checking personal details and emergency contacts and providing bank details and P45/HMRC New Start Checklist tasks 2)Complete the Induction Survey Task (issued on day 90)

Step 13 – Cancel of Hire

There are certain scenarios when the process for cancel the hire should be followed, namely:

- Employee is a no show or has advised the university they do not wish to start
- The decision is taken to withdraw the offer of employment due to pre employment check failure or failure of Right to Work checks

	Line Manager	Hiring Manager	School/Department Administrator	HR Systems	HR Operations
Process	<p>1)On the employee’s first day Line Managers have a responsibility to confirm if the employee does not start. The Onboarding Checklist task will prompt and remind Line Managers to complete this task in P&M. This task can be marked as n/a should the employee start as expected.</p> <p>2)Raise a service request under the category of Enquiry>Resourcing>Cancel Hire.</p> <p>3)Consider if recruitment needs to be reopened. Contact HR Operations by raising an enquiry through P&M if you need to reopen the vacancy.</p> <p>4)Make arrangements for the collection of any equipment or access cards issued ahead of the start date.</p>			<p>Upon receipt of SR:</p> <p>1)Remove all non- mandatory personal data on person record</p> <p>2)Anonymise mandatory personal data</p> <p>3)Reassign the SR to HR Operations</p>	<p>Upon Receipt of SR follow the Termination Process using the P&M user guide ‘Terminations Checklist’</p> <p>1)Check if employee has any direct reports and reassign</p> <p>2)Cancel Work relationship</p> <p>3) If the employee is a sponsored worker, follow the above checklist and notify the home office that the new hire will not be starting employment.</p>
<p>Supporting Information</p> <p>Payroll are notified via a report once Oracle is updated and the hire is cancelled, from Phase 2 this approach will also be taken once the P&M transaction has been completed by HR Operations.</p>					

Appendices

Appendix 1 - Subsidiaries

There are three subsidiary companies, Edinburgh University Press, Edinburgh Innovations and UoE Accommodation Ltd. Below outlines the scope processes available for recruitment and onboarding and a breakdown of current levels of adoption of the system across the 3 areas.

	In Scope Activities	Out of Scope
Recruitment	Can use Oracle Recruitment Cloud (ORC) to advertise, select and hire staff. All vacancies will appear on the UoE careers site Positions to Recruit Against. Own Job Requisition Approval Routing (pending defect resolution).	Own branded careers site for each subsidiary. Subsidiary specific application flows. Offer Letters– the templates are UoE in the content library and therefore need to be produced offline.
Onboarding	Existing Tasks within the library can be issued (e.g. provide bank details).	Contracts – the templates are only UoE in the content library and therefore need to be produced offline. Onboarding Checklists – only configured for UoE.