



# Guide to Work Schedules

## Contents

Introduction .....	2
Glossary.....	2
End to End Process Map .....	3
Key Roles .....	4
Before you start .....	4
Determining your work schedule format .....	5
Setting up a Work Schedule for a new starter.....	6
Requesting a change of Work Schedule on People & Money .....	7
Employees on Guaranteed Hours Contract .....	8
Employees with multiple assignments .....	8
Employees on Fractional or Annualised Contracts .....	8
Employees who do not have a regular working pattern (e.g. hours vary through the year, on rolling rota or shifts).....	9
Step 1 - Discuss work schedule with employee or new start. ....	10
Step 2 - Use Work Schedule calculator to generate work schedule .....	11
Step 3 – Add or Update work schedule to employee assignment .....	11
Appendices.....	12

## Introduction

This guidance document has been written to support the use of work schedules within the University of Edinburgh. Work schedules are fundamental to People and Money especially in relation to Annual leave and payroll impacting absences.

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 process of a Line Manager or Hiring Manager and where there is overlap this is shown.

## Glossary

P&M	People and Money
Work schedule	The <b>number of hours</b> they work each day . (Please note this is <b>not</b> the start and end times but the number of hours worked each day) and the number of days over which an employee's working hours are distributed.
Fractional Hours staff	<a href="#">See Contract Types Guidance</a>
Annualised Hours staff	<a href="#">See Contract Types Guidance</a>
Guaranteed Hours staff	<a href="#">See Contract Types Guidance</a>
SR	Service Request

## End to End Process Map

Please see the end to end process map for [work schedules](#).

## Key Roles

<b>Role</b>	<b>Description</b>
<b>HR Systems Team</b>	The HR Systems team are responsible for the set up and maintenance of the structures in People and Money. This includes the creation of shifts, workday patterns and work schedules.
<b>HR Operations/ Hiring Manager</b>	The HR Operations team/Hiring Manager is responsible for assigning a work schedule to an employee's assignment
<b>Employee</b>	Employees that have an agreed work schedule assigned to a new assignment or a schedule amendment to an existing assignment.
<b>Line manager</b>	Line Manager that has an employee that has an agreed schedule assigned to a new assignment or a schedule amendment to an existing assignment.
<b>School/ Department Administrator</b>	Staff that provide local administrative/operational support to line managers and employees for the end-end processes.

## Before you start

Work schedules in People and Money are very important as they underpin the operation of other functions, eg Payroll and the annual leave requesting/recording process. The amount of annual leave requested and recorded will be determined by your work schedule and payroll impacting absence such as sick pay and special leave are also recorded based on your work schedule. Therefore every assignment must have a work schedule and these are normally discussed and agreed on appointment or when there is a change in working hours/pattern or a Flexible Working Request has been made.

An employee can view their work schedule by opening People and Money, click on the Me tab, then click on Time and Absences, then click on Team Schedule. This will show your schedule (along with those who also report to your line manager) for the current week. You can scroll along weeks by clicking on the arrows beside the Today button. Days and hours you are scheduled to work are shown in the blue boxes.

A line manager can view the work schedule of their direct reports by opening People and Money, click on the My Team tab, then click on Show More, then click on Team Schedule. This will show your teams schedule for the current week. You can scroll along weeks by clicking on the arrows beside the Today button. Days and hours they are scheduled to work are in blue boxes.

The working week in People and Money always starts on Sunday and ends on Saturday.

### Determining your work schedule format

The majority of staff members work the same hours and have the same working pattern each week eg 35 hours per week over 5 days, Monday to Friday, or 28 hours per week over 4 days, Monday to Thursday. However, many colleagues work varying hours or different shift patterns.

Your work schedule comprises the **number of hours** you work each day and the number of days /weeks in your overall working pattern. Please note this is **not** about recording the start and end times of your working day but the actual number of hours worked each day and the number of days/weeks over which those working hours are distributed.

So, if you work 35 hours per week, Monday to Friday, 7 hours a day, your Work Schedule format is 35\_7days\_S0M7T7W7T7F7S0.

And, if you work 28 hours per week, Monday to Thursday, 7 hours a day, your Work Schedule format would be 28\_7days\_S0M7T7W7T7F0S0.

Your working pattern may also run over more than one week. So if you work 5 days one week and then 4 days the next week – with say the second Friday as a non-working day - the period over which your work pattern is recorded is 14 days (not 7 days) eg 31.5\_14days\_S0M7T7W7T7F7S0S0M7T7W7T7F0S0. The 31.5 figure is the average number of hours worked each week in your working pattern.

Or you may work 35 hours a week but your daily working hours vary over a fortnightly cycle. In which case your Work Schedule format might look something like 35\_14days\_S0M8T8W8T8F8S0S0M7.5T7.5W7.5T7.5F0S0.

Two points to remember are;

- The first figure is the AVERAGE number of hours worked per week over the working pattern.
- The second figure is the number of days in the working pattern. This is known as the Period Cycle, e.g. 7 days, 14 days, etc. It is important to ensure that when starting a new work schedule, it begins at the correct point in the period cycle, so that non-working days align correctly and annual leave is recorded correctly. Please ensure the start date of the pattern is stated so HR Operations know when to start the pattern when they make any changes to work schedules

If you work part time hours e.g. 6 hours 15 minutes the format of the work schedule requires the daily hours to be input as a decimal ie 6.25 (6 and a quarter hour), rather than 6.15 (6 hrs and 15 minutes). Other examples are 7 and half hours is 7.50 and 4 hours and 20 minutes should be shown as 4.33. Decimals should only be to two decimal points and you may need to round the decimal to match exactly the number of contracted weekly average hours. There should be no detriment to the employee in rounding.

Other examples:

Working 70 hours over 14 days – 10 days x various hours per day	35_14days_S0M8T8W8T7.5F3.5S0S0M7T7W7T7F7S0
Working 70 hours over 14 days – 9 days x same hours per day (every 2 <sup>nd</sup> Monday off)	35_14days_S0M0T7.78W7.78T7.78F7.78S0S0M7.78T7.78W7.78T7.78F7.77S0
Working 70 hours over 14 days – 9 days x same hours per day (every 2 <sup>nd</sup> Friday off)	35_14days_S0M7.79T7.78W7.78T7.78F7.78S0S0M7.78T7.78W7.78T7.78F0S0
Working 63 hours over 14 days – 9 days x 7 hours (every 2 <sup>nd</sup> Friday off)	31.5_14days_S0M7T7W7T7F7S0S0M7T7W7T7F0S0
Working 28 hours per week – 4 days x 7 hours (every Wednesday off)	28_7days_S0M7T7W0T7F7S0
Working 20 hours per week – 5 days x 4 hours	20_7days_S0M4T4W4T4F4S0
Working 20 hours per week – 4 days x 5 hours (every Monday off)	20_7days_S0M0T5W5T5F5S0

The work schedule and working hours over the period cycle **must** match. The People and Money system **does not** automatically validate hours against work pattern. Please take extra care when you are providing work schedule information that the work schedule and working hours match.

There is a [Work Schedule Calculator](#) available to help you generate the correct Work Schedule

### Setting up a Work Schedule for a new starter

All new starts must have a work schedule added to their record in People and Money, this should be provided to HR Operations at the ‘Request Contract’ step of the Recruitment and Onboarding process. Further information can be found in the [Guide to Recruitment and Onboarding](#).

The steps a manager should follow are:

- Add the Work Schedule to the “Request Contract Task” using the drop down menu
- If the pattern you need is not listed, use the [work schedule calculator](#) to generate the pattern and provide the work schedule in the ‘Details of Work Schedule if not listed’ field in the Request Contract Task.
- HR Operations will update the work schedule upon receipt of the Request Contract task and if required request that a new work schedule is created via HR systems by raising a Service Request - Forms>Interim Forms>Add a new work schedule

It should also be noted that any **current employees** who are transferring to a new or additional post or starting a secondment should also have their work schedule reviewed and updated if applicable. The work schedule should be included in the [Request for Transfer, Additional Post or Internal Secondment form](#).

#### Requesting a change of Work Schedule on People & Money

Once you have agreed with your line manager your new work schedule, People & Money needs to be updated with your new work pattern. Remember, this is important because your annual leave, sick pay etc is calculated based on the work schedule P&M holds for you.

The following situations require new work schedule information.

<b>Change to contractual weekly hours (increase/decrease of hours)</b>	Any increase or decrease of contractual working hours will always result in a change to work schedule too. An Outcome of Contract Review form must be completed detailing the revised working hours and new work schedule and approval for the change must be obtained using local (currently offline) approval practices. Line managers or School/Department administrators should complete OCR form seeking approval in line with the <a href="#">Employment Approvals Briefing Document</a> table and attach to SR>Interim Forms >Outcome of Contract Review
<b>Change of assignment /job changes</b>	Where there is a change of assignment then an Outcome of Contract Review form must be completed and approval given off line using local practices. Line managers or School/Department administrators should complete OCR form (seeking approval in line with the <a href="#">Employment Approvals Briefing Document</a> table and attach to SR>Interim Forms >Outcome of Contract Review. If there is any change to work schedule, then this should be included on the OCR form.
<b>Flexible working request to change hours</b>	If the employee has made a Flexible Working Request, the completed Flexible Working Request form approved offline. New work schedule must be specified on FWR form. The form should be signed and attached to an SR>Interim Forms >Flexible Working or Flexible Retirement

<b>Changing work schedule without changing contractual weekly hours</b>	If the individual is changing their working schedule without a change of contractual weekly hours, complete an SR>Interim Form>Work Schedule change (no hours change). For example if someone is still going to work 35 hours per week, but they are going to work 1 hour extra each day Mon – Thurs and finish 4 hrs earlier on a Friday, then this new schedule needs to be updated in P&M because it will impact how their annual leave is recorded. This change is requested via an Online Form /Service request and the SDA/LM should use work schedule calculator to generate/validate the new work schedule and then copy and paste output (new work schedule) in to the body of SR.
<b>Secondments</b>	In the case of a secondment the employees work schedule should be reviewed and updated (if required) as part of the recruitment and onboarding process. Please note that if the secondment is in part, i.e. the employee is retaining some hours in their substantive post the work schedule will need to be updated for both the substantive and additional assignment records.

### Employees on Guaranteed Hours Contract

The Work Schedule GHdefault\_S1M1T1W1T1F1S1 is to be used for ALL GH staff.

To generate this Work Schedule correctly you must select the Period Cycle 'GHdefault' and enter 1 hour for each of the 7 days of the week (even though GH contracts have 0 hours assigned to them).

### Employees with multiple assignments

Where the employee holds multiple assignments, each assignment must hold a work schedule that matches the working hours for that assignment.

### Employees on Fractional or Annualised Contracts

For an employee on a fractional or annualised contract, the Work Schedule format might look something like ANNUAL\_19.75\_S0M0T6.5W6.5T6.75F0S0.

To generate this Work Schedule correctly you must select the Period Cycle 'ANNUAL'. The first number should always match the weekly contractual hours , however the daily breakdown should be the actual hours worked, even if this does not add up to the weekly contractual hours. For example, the employee could have an annualised weekly contract of 20 hours per week. During the period of the year when they are working they may actually work 35 hours per week, but in the period of the year where they don't work they would work nothing. Their pattern when working would be ANNUAL\_20\_S0M7T7W7T7F7S0 but their pattern would change and be updated in the system during the period they don't work.



**If the employee has a non-working period**, an SR should be raised for the HR Ops team to update the employee's record in P&M with this information by leaving their work schedule field blank for the stated period. When the employee starts working physically again, their new schedule should be added to their records by following the SR process.

Employees who do not have a regular working pattern (e.g. hours vary through the year, on rolling rota or shifts)

Where an employee does not have a regular working pattern, or it is for longer than a 28 day period, the Work Schedule should always reflect their actual hours worked. The Work Schedule calculator tool is only able to accommodate patterns up to a maximum of 28 days, so if the period is for longer than 4 weeks, you should raise a Service Request to check if the pattern already exists and if not, to ask HR Systems to create the required work schedule name. You must always make sure that the effective date of the rota pattern is clearly articulated on the forms.

Further information regarding Annual leave entitlement and deductions can be found [here](#). Work schedule impacts annual leave balance - if you add a work schedule it will deduct leave according to that schedule i.e. festive leave dates. When absences are loaded, the system will only deduct as per their work schedule, so if you don't work a particular day then there would not be an entry for that day. However, the system can only work on the provided data. If no work schedule existed at launch then default was used. For someone without a schedule the default is 7 hours per day, Monday to Friday.

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, following the P&M user guide '[How to raise and maintain a service request enquiry](#)'.

Step 1 - Discuss work schedule with employee or new start.

Role	Line Manager (LM)	School/Department Administrator (SDA)	Employee
<b>Process</b>	Discuss preferred work schedule with employee. A new start is assigned their work schedule covered under Pre-Boarding, however, where the work schedule does not exist a Service Request is required to create the new schedule	SDAs cannot currently view work schedules on the My Client Group tab. If asked by a LM or employee for support they should ask the LM or employee to show them the pattern as detailed on the Team Schedule app.	<p>It is vital that your work schedule is correct in People and Money. To check your work schedule, open People and Money, click on the Me tab, then click on Time and Absences, then click on Team Schedule. This will show your schedule (along with those who also report to your line manager) for the current week. You can scroll along weeks by clicking on the arrows beside the Today button. Days and hours you are scheduled to work are in blue boxes. If these are incorrect, you should speak to your line manager or your local School/ Department Administrator (SDA).</p> <p>If you have more than one work assignment, please check your work schedule is correct for each assignment.</p> <p>You do not need to record your start and finish times.</p> <p>If you want to look at a specific week you can use the filters</p> <p>If you want to change your hours you will need to discuss your working schedule with your line manager. You should use a Flexible Working Request form for this. Once agreed, your line manager or SDA can request an update the work schedule for you.</p>
<p><b>Supporting Information</b>  P&amp;M user guide - <a href="#">How to log in and out of People and Money</a></p>			

## Step 2 - Use Work Schedule calculator to generate work schedule

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.

Role	Line Manager (LM)	School/Department Administrator (SDA)
<b>Process</b>	<p>For new starts the “Request Contract Task” has a drop down list of available work schedules.            If the pattern you need is not listed use the <a href="#">work schedule calculator</a> to generate the pattern and provide the work schedule in the ‘Details of Work Schedule if not listed’ field in the Request Contract Task.</p> <p>Further details are available on this step within the <a href="#">Guide to Recruitment &amp; Onboarding</a>.</p> <p>Where a change of work schedule is needed for an existing member of staff the LM/ SDA should input the new work schedule using the OCR or Flexible working form, <a href="#">the work schedule calculator</a> should be used to generate the pattern.</p>	
<p><b>Supporting Information</b>            P&amp;M user guide - <a href="#">How to raise a service request</a></p>		

## Step 3 – Add or Update work schedule to employee assignment

Role	HR Operations	HR Systems
<b>Process</b>	<p>For new starts HR Operations will update the work schedule on receipt of the request for contract task.</p> <p>For Job Changes - HR Operations check whether the work schedule on the OCR or flexible working/retirement form is available.</p> <p>Where a request has a work schedule that is not currently in the system then an SR should be raised by HR Operations to HR Systems, Forms&gt;Interim Forms&gt;Add a new work schedule.</p>	<p>The SR goes to the HR Systems team.</p> <p>HR Systems check there is no work schedule already available. If not they should Create a new work schedule <a href="#">HR Systems - How to create a new work schedule</a>.</p> <p>Update SR comments box to state work schedule has been created. SR goes back to HR Operations for them to assign to employee.</p>

	<p>Once the work schedule has been created HR Operations will receive a notification from HR Systems and they should then assign the work schedule to the employees assignment and run the Evaluate Absences process that will adjust future booked absences to reflect the new working pattern.</p> <p>Please note: It is essential that the Primary drop down menu is <b>always</b> marked as YES. This applies to historic work schedules. This is because work schedules are based on assignment so the pattern is the primary schedule for that assignment at that period of time.</p>	
<p><b>Supporting Information</b>  <a href="#">HR Ops - How to assign a work schedule to an employee's assignment</a></p>		

## Appendices

### Appendix 1 - Subsidiaries

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

	<b>In Scope Activities</b>	<b>Out of Scope</b>
Work Schedules	Work schedules are required for all employees working in subsidiaries. These need to be added for new starters and be maintained according to this guidance.	

<b>Adoption</b>	<b>Edinburgh Innovations</b>	<b>Edinburgh University Press</b>	<b>UoE Accommodation Ltd</b>
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Work schedules	Using functionality as planned
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