People and Money system

We know this format may not be accessible for all. To request this guide in a different format please email hrhelpline@ed.ac.uk

Assumed Knowledge:

HR Operations has already carried out pre-hire checks on candidates hired outside ORC before a Pending Worker record is created in People and Money.

The Job Requisition Business Case form should be attached to provide evidence of budgetary approval.

If the pending worker needs to be given ‘employee’ status, i.e. if they started as an employee before they have been entered into the system, for new hires follow the steps to Quick Convert the pending worker, ensuring all required preboarding tasks are complete. For rehires, follow the steps to convert the pending worker.

Rehired employees will need to have generic preboarding checklist manually assigned to generate and receive their contract. Irrelevant tasks will need to be removed from the checklist.

If the pending worker hire needs to be cancelled, an SR will need to be raised for HR Ops to cancel the work relationship. Please do not terminate the pending worker record.

Right to work and other sensitive documents should not be attached to the pending worker transaction. These are submitted through onboarding checklist tasks at a later stage.

In Brief…

Add a Pending Worker

1. From the Home page click My Client Groups, and select Show More under Quick Actions
2. Select **Add a Pending Worker**

3. **Check the boxes** against all the info you would like to manage and then press **Continue**

4. Complete the **When and Why** section and click **Continue**

5. Complete the **Person Details** section including the **Preferred Name** and **National Insurance Number** (if known) and click **Continue**

6. If a duplicate record is found, follow the **rehire** steps below, if not, continue to step 7

7. Complete the **Communication Info** section. A personal email address must be entered as a work email to generate a temporary login for the new hire. Click **Continue**

8. Add **Address** details.

9. Click **Continue** in the **citizenship info** section as the candidate can complete this themselves

10. Click **Continue** within the **Family and Emergency Contacts** section as the employee can complete these details themselves at the preboarding stage

11. In the **Employment Details** section complete the mandatory fields, add the **Personal Job Title**, fill in all other relevant information as required for the contract. For fixed term workers only, ensure the **Projected End Date** is completed. Click **Continue**

12. In the **Additional Assignment Info** section, select the dropdown and add Guaranteed Hours or Annualised/Fractional contract information as required, then click **Continue**

13. In the **Maintain Managers** section, **Add** or **Edit** the line manager of the new hire as needed, then select **Continue**

14. In the **Payroll Details** section, set the Tax Reporting Unit to University of Edinburgh. Then, click the **Add** button against Payroll Frequency
and UoE Group under Payroll. Then select Continue.

15. In the Salary section, use the Salary Basis dropdown to select Annual Salary then select Continue.

16. The Compensation section is not being used until Payroll is processed via People and Money so click Continue.

17. Add and comments and upload the completed Job Requisition Business Case form to the Comments and Attachments section then click Submit.

Rehire a previous employee

1. Select the previous worker record and click Continue.

2. Click Ok.

3. Check the boxes against all the info you would like to manage and then press Continue.

4. Complete the When and Why section and click Continue.

5. Confirm the personal details are correct then click Continue.

6. Add or amend Communication Info as required then click Continue.

7. Add or amend Address details as required then click Continue.

8. Add or amend Citizenship Info as required then click Continue.

9. In the Employment Details section complete the mandatory fields, add the Personal Job Title, fill in all other relevant information as required for the contract. For fixed term workers only, ensure the Projected End Date is completed. Click Continue.

10. In the Additional Assignment Info section, select the dropdown and add Guaranteed Hours or Annualised/Fractional contract information as required, then click Continue.
11. In the Maintain Managers section, Add + Edit the line manager of the new hire as needed, then select Continue

12. Click Continue in the Work Relationship Info section

13. In the Payroll Details section, set the Tax Reporting Unit to University of Edinburgh then, click the Add button against Payroll Frequency

14. Select UoE Group under Payroll then select Continue

15. In the Salary section, use the Salary Basis dropdown to select Annual Salary then select Continue

16. The Compensation section is not being used until Payroll is processed via People and Money so click Continue

17. If required, Add Direct Reports by searching and selecting existing employees to report into the new hire then select Continue

18. Add and comments and upload the completed Job Requisition Business Case form and New Appointee Information Form to the Comments and Attachments section then click Submit

Quick Convert a Pending Worker to an Employee

1. From My Client Groups select Pending Workers
2. Click the ellipsis next to the pending worker you wish to quick convert to an employee then select Quick Convert
3. The pending worker will now show as an employee in Person Management

Convert a Pending Worker Rehire to an Employee

1. From My Client Groups select Pending Workers
2. Click the ellipsis next to the pending worker you wish to convert to an employee then select Convert
3. Select all information to be managed then click Continue
4. Check and modify the work relationship start date to the start date of the rehire
5. Select the appropriate action reason using the what’s the way to create the work relationship dropdown
6. Complete the remaining fields as appropriate then select Continue
7. Check and edit the remaining details as required, working through each section
8. Once all sections have been checked, click **Submit**

For detailed guidance, see the **next section**.

**In Detail...**

1. From the **Home** page, click on the **My Client Groups** and select **Add a Pending Worker**

2. **Check the boxes** against all the info you would like to manage and then press **Continue**
3. In the When and Why section,
   a. Enter the pending worker start date
   b. Select the relevant Legal Employer
   c. Select the relevant Proposed Worker Type
   d. Make sure the Action under ‘What's the way to add the pending worker’ states ‘Add Pending Worker’
   e. Select the Action Reason ‘Future hire to fill vacant position’ in the ‘Why are you adding a pending worker section
   f. Then press Continue.
4. In the **Person Details** section, enter just the information in the mandatory fields plus the worker **Title** and **Preferred Name**.

The new hire will be asked to complete other personal information at the pre-boarding stage.

**Note:**

a. If the preferred name has not been provided, **please enter their first name**. Preferred name is used in People and Money, not first name. So omitting this will impact correspondence and how their name appears in the directory (which only shows preferred name).

b. The following fields **must not** be completed:
   - Student Number
5. Click the **Add** button in the National Identifiers section, enter the **National Insurance Number** (if known), and then click **Continue**.
The duplicate worker check runs against the National Insurance Number. If you receive a message regarding Potential Matches see the steps for Rehire a previous employee below.

If the hire has indicated that they have been previously employed by the university but has not provided a National Insurance number, please raise a service request.

6. In the Communication Info section enter contact details for the new employee. A personal email address must be entered as a work email to generate a temporary login for the new hire.
7. Add **Address** details. If not recorded here, the candidate is reminded to check and enter this information in a preboarding task however this information is required for payroll and pension purposes.

8. Click **Continue** in the **citizenship info** section as the candidate can complete this themselves.

9. Click **Continue** within the **Family and Emergency Contacts** section as the employee can complete these details themselves at the preboarding stage.
10. In the **Employment Details** section,
   a. Make sure the Assignment Status is set to **Active – Payroll Eligible**
   b. Search for and select the relevant **Business Unit**
   c. Select the relevant **Assignment Category**
   d. Add the **Personal Job Title**
      **Note:** This automatically populates with the position name so it should be overwritten for a meaningful job title. This will also impact on correspondence e.g. contracts
   e. For fixed term workers only, ensure the **Projected End Date** is completed
   f. Fill in all other relevant information as required for the contract
g. Then, press **Continue**

Note:
- You must enter the all relevant details here as they pull through into the pending worker assignment details.
- The following fields **do not** need to be completed:
  1. Worker Engagement Details
  2. Uniformed Grade (check box)
  3. Standard Working Hours Override
  4. HESA Reason for End of Contract
  5. Role Identifier
- The following fields can be updated **only if known**:
  1. Research/Teaching&Research/Teaching only
  2. Level
- Follow the guidance for position management and request a new position or a position change to ensure there is adequate FTE available to appoint the new hire to.
- Ensure you complete the Grade Ladder and Grade details to automatically pull the salary through into the Salary details. For
the university grade ladder use UE07 for Grade 7. Off-scale salary codes end in an N i.e. UE7N.

- For fixed term assignments, ensure you complete the Fixed Term Reason Code and Projected End Date.
- For Guaranteed Hours assignments set the working hours to 0 per week to calculate a 0 FTE, and use the additional assignment information in a later section to record the details.
- For HESA Standard Occupational Classification information for 2019/2020 click here.

11. In the Additional Assignment Info section, select the dropdown and add Guaranteed Hours or Annualised/Fractional contract information as required, then click Continue:

For Guaranteed Hours:
a. **Current Guaranteed Hours Start Date**

b. **Guaranteed Hours End Date** – enter end date for GH hours

c. **Number of Hours** - enter total number of hours for the contract

d. **Number of Hours Period** - enter period over which the hours will be worked:
   - Over period of current FTC
   - Over Period of Current GHC
   - Per Year
   - Per Year Every Year
   - Per Year Every Year over the duration of the FTC

e. If applicable, enter **Reason for No Hours:**
   - Long Term Sick
   - Maternity Leave/Shared Parental Leave
   - Suspension of Contract for Agreed Reasons

Annualised/Fractional Information
12. In the **Maintain Managers** section, **Add** or **Edit** the line manager of the new hire as needed, then select **Continue**.
13. In the **Payroll Details** section, set the Tax Reporting Unit to University of Edinburgh

Then, click the **Add** button against Payroll Frequency
Select **UoE Group** under Payroll

This step is extremely important as the pending workers will be unable to add bank details unless this relationship is created.

Then select **Continue**

14. In the **Salary** section, use the **Salary Basis** dropdown to select **Annual Salary** then select **Continue**

The salary amount should populate for all on-scale salaries. If this is an off-scale salary, populate the **Salary Amount** field as appropriate
15. The **Compensation** section is not being used until Payroll is processed via People and Money so click **Continue**

16. Add and comments and upload the completed Job Requisition Business Case form and New Appointee Information Form to the **Comments and Attachments** section then click **Submit**

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**Rehire a previous employee**

1. If the National Insurance Number matches one held for a previous employee and the Person Name matches the pending worker name, select the previous worker record and click **Continue**.
If the names do not match confirm the National Insurance Number is correct. If necessary, click **No match, add person** then **Continue** and return to follow the **create a pending worker process**.

2. Click **OK** to confirm you wish to create a new work relationship for this person.

3. **Check the boxes** against all the info you would like to manage and then press **Continue**.
4. Enter the **When and Why** information then click **Continue**

   a) **What's the way to create the work relationship?** – select **Add a Pending Worker**  
      **Note:** DO NOT select ‘Add pending worker relationship’ as it would cause issues with contract generation  
   b) **Why are you adding a work relationship?** – select **Future Hire to fill vacant position**  

5. Confirm the personal details are correct then click **Continue**
6. Add or amend **Communication Info** as required then click **Continue**. Personal email address needs to be added as a work email for the rehire to access any preboarding tasks.

7. Add or amend **Address** details as required then click **Continue**
8. Add or amend Citizenship Info as required then click Continue

17. In the Employment Details section,
   a. Make sure the Assignment Status is set to Active – Payroll Eligible
   b. Search for and select the relevant Business Unit
   c. Select the relevant Assignment Category
   d. Add the Personal Job Title
   e. For fixed term workers only, ensure the Projected End Date is completed. Click Continue
   f. Fill in all other relevant information as required for the contract
   g. Then, press Continue
You must enter the all relevant details here as they pull through into the pending worker assignment details.

Follow the guidance for position management and request a new position or a position change to ensure there is adequate FTE available to appoint the new hire to.

Ensure you complete the Grade Ladder and Grade details to automatically pull the salary through into the Salary details. For the university grade ladder use UE07 for Grade 7. Off-scale salary codes end in an N i.e. UE7N.

For fixed term assignments, ensure you complete the Fixed Term Reason Code.

For Guaranteed Hours assignments set the working hours to 0 per week to calculate a 0 FTE, and use the additional assignment information in a later section to record the details.

For HESA Standard Occupational Classification information for 2019/2020 click here.
18. In the **Additional Assignment Info** section, select the dropdown and add Guaranteed Hours or Annualised/Fractional contract information as required, then click **Continue**:

For Guaranteed Hours:

- **a. Current Guaranteed Hours Start Date**
- **b. Guaranteed Hours End Date** – enter if GH contract is fixed-term
- **c. Number of Hours** - enter total number of hours for the contract
- **d. Number of Hours Period** - enter period over which the hours will be worked:
  - Over period of current FTC

![Diagram of Additional Assignment Info](image1.png)

![Diagram of Additional Assignment Info](image2.png)
- Over Period of Current GHC
- Per Year
- Per Year Every Year
- Per Year Every Year over the duration of the FTC

e. If applicable, enter **Reason for No Hours:**
- Long Term Sick
- Maternity Leave/Shared Parental Leave
- Suspension of Contract for Agreed Reasons

**Annualised/Fractional Information**

9. In the **Maintain Managers** section, **Add** or **Edit** the line manager of the new hire as needed, then select **Continue**
10. Click **Continue** in the **Work Relationship Info** section

19. In the **Payroll Details** section, set the Tax Reporting Unit to University of Edinburgh then, click the **Add** button against Payroll Frequency
Select **UoE Group** under Payroll then select **Continue**

20. In the **Salary** section, use the **Salary Basis** dropdown to select **Annual Salary** then select **Continue**
The salary amount should populate for all on-scale salaries. If this is an off-scale salary, populate the **Salary Amount** field as appropriate.

21. The **Compensation** section is not being used until Payroll is processed via People and Money so click **Continue**

22. If required, **Add Direct Reports** by searching and selecting existing employees to report into the new hire then select **Continue**
23. Add and comments and upload the completed Job Requisition Business Case form and New Appointee Information Form to the Comments and Attachments section then click Submit

Quick Convert a Pending Worker to an Employee

1. From My Client Groups select Pending Workers
2. Click the **ellipsis** next to the pending worker you wish to quick convert to an employee then select **Quick Convert**

3. The pending worker will now show as an employee in **Person Management**

4. Rehired employees will need to have generic preboarding checklist manually assigned to generate and receive their contract. Irrelevant tasks will need to be removed from the checklist
Convert a Pending Worker Rehire to an Employee

1. From **My Client Groups** select **Pending Workers**

![Pending Workers](image1)

2. Click the **ellipsis** next to the pending worker you wish to convert to an employee then select **Convert**

![Pending Workers](image2)

3. Select all information to be managed then click **Continue**

![Pending Workers](image3)
4. Check and modify the **work relationship start date** to the start date of the rehire.

5. Select the appropriate action reason using the **what's the way to create the work relationship** dropdown.
Add Employee Work Relationship - used for creating a multiple assignment
Hire – used to hire an external candidate with no previous work relationship
Rehire an Employee – used to rehire a candidate with a previous work relationship/record

6. Complete the remaining fields as appropriate then select **Continue**

7. Check and edit the remaining details as required, working through each section following the same instructions as provided in the rehire guidance as required.
a. **Edit** as required by selection the icon

**Note:** Please ensure the Payroll Details are complete and the Payroll Relationship has been added.

8. Once all sections have been checked, click **Submit**
Glossary

Please refer to the Glossary