People and Money system

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School/Department Admin Guide - How to Add a Pending Worker

School/Department Admin

Estimated time to complete: 15 minutes

Before you start

Please familiarise yourself with the Guide to Recruitment and Onboarding.

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

The Appointee Information Form should be completed by the new hire before you start this process.

Once the pending worker record has been approved the Onboarding Journey 'Welcome to the University of Edinburgh' (for new hires) or 'Rejoining the University of Edinburgh' (for rehires) will be **automatically** assigned. Further information regarding Journeys can be found in the Line Manager or SDA Guide to Journeys.

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 Journey tasks at a later stage.

Allowances (if applicable) must be added to the Compensation section. If the allowance you need is not listed, please add this to the comments section.

If the person you are hiring has an active casual worker assignment you must contact HR Operations to have the termination date brought forward by raising a service request, including the hire date. Please review the details in the Guide to Casual Workers (Under Recruitment & Onboarding heading)

The **Default Expense Account Code** must be added for all pending workers. This enables users to submit any future expense claims. This will be captured within the approved Job Requisition Business Case Form.

In Brief…

Add a Pending Worker

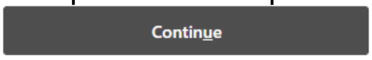
1. From the **Home** page click **My Client Groups,** and select **Show More** under Quick Actions.
2. Select **Add a Pending Worker**
3. **Check the boxes** against all the info you would like to manage and then press **Continue**
4. Complete the **When and Why** section and click **Continue**
5. Complete the **Person Details** section including the **Preferred Name** and **National Insurance Number** (if known) and click **Continue**
6. If a duplicate record is found, check the Person Type and Termination Date, following the steps on page 8 and 9 below. If no duplicate found, continue to step 7.
7. Complete the **Communication Info** section. A personal email address must be entered in both the personal email address and work email address field. Click **Continue**.
8. Add **Address** details.
9. Complete the **citizenship info** section, adding the nationality of the candidate.
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 (detailed below), 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. Please include the **default expense account code** details. 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, select UoE Group in the **Payroll Frequency** section then select **University of Edinburgh** as the **Tax Reporting Unit**. Then select **Continue**

15. In the **Salary** section, us the **Salary Basis** dropdown to select **Annual Salary** then select **Continue**
16. Complete the **Compensation section should any allowances** be required and click **Continue**
17. Add any comments and upload the completed Job Requisition Business Case form to the **Comments and Attachments** section then click **Submit**

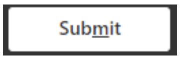
Rehire a previous employee

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 (detailed below), 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. Please include the **default expense account code** details. 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** or **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, select UoE Group in the **Payroll Frequency** section then select **University of Edinburgh** as the **Tax Reporting Unit**. then select **Continue**
14. In the **Salary** section, use the **Salary Basis** dropdown to select Annual Salary then select **Continue**

15. Complete the Compensation section should any allowances be required and select **Continue**



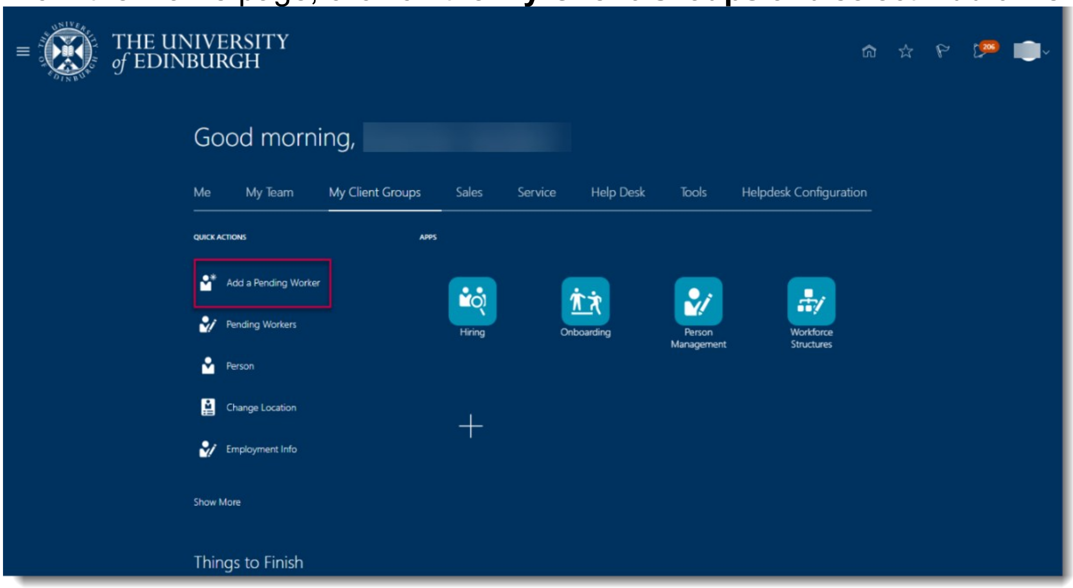
16. If required, **Add Direct Reports** by searching and selecting existing employees to report into the new hire then select **Continue** 

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

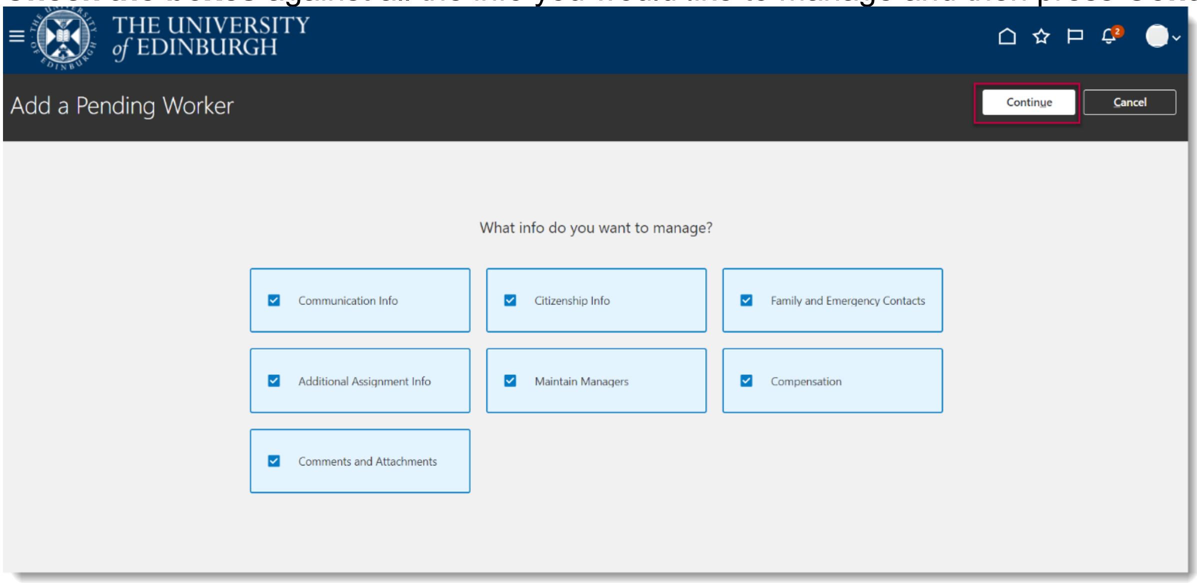
In Detail...

Add Pending Worker

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**

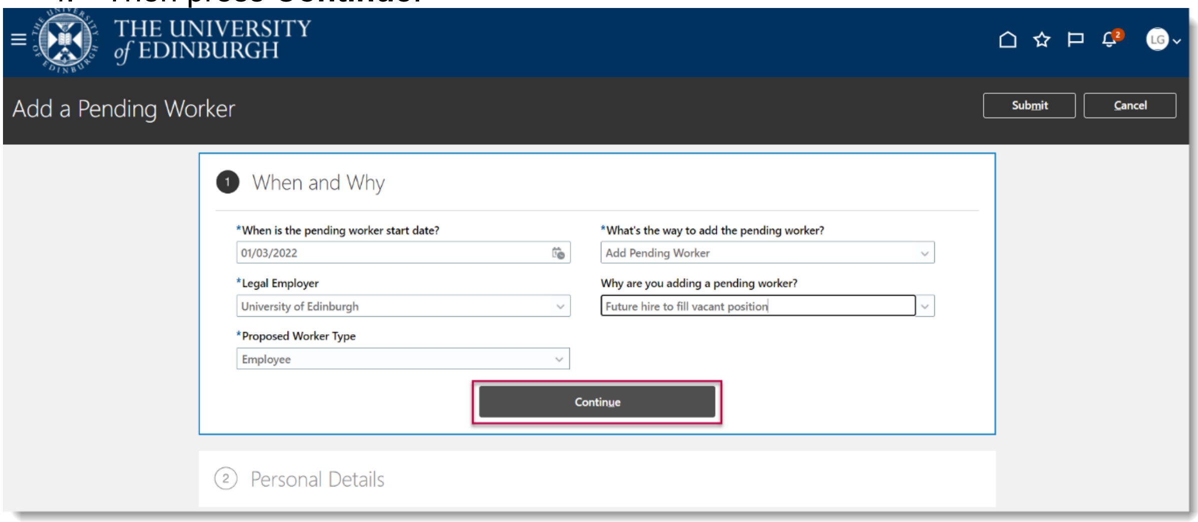
    b. Select the relevant **Legal Employer**

    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

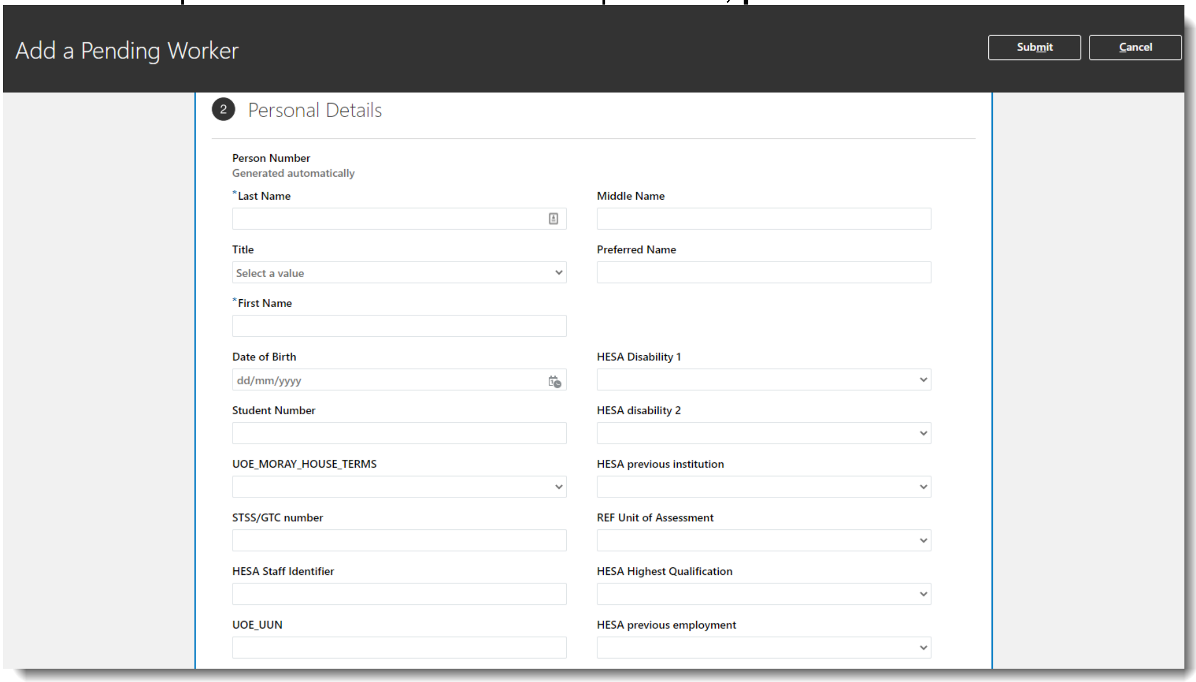
    f. Then press **Continue**.



4. In the **Personal Details** section, enter just the information in the mandatory fields plus the worker **Title** and **Preferred Name.** Please avoid using special characters where ever possible

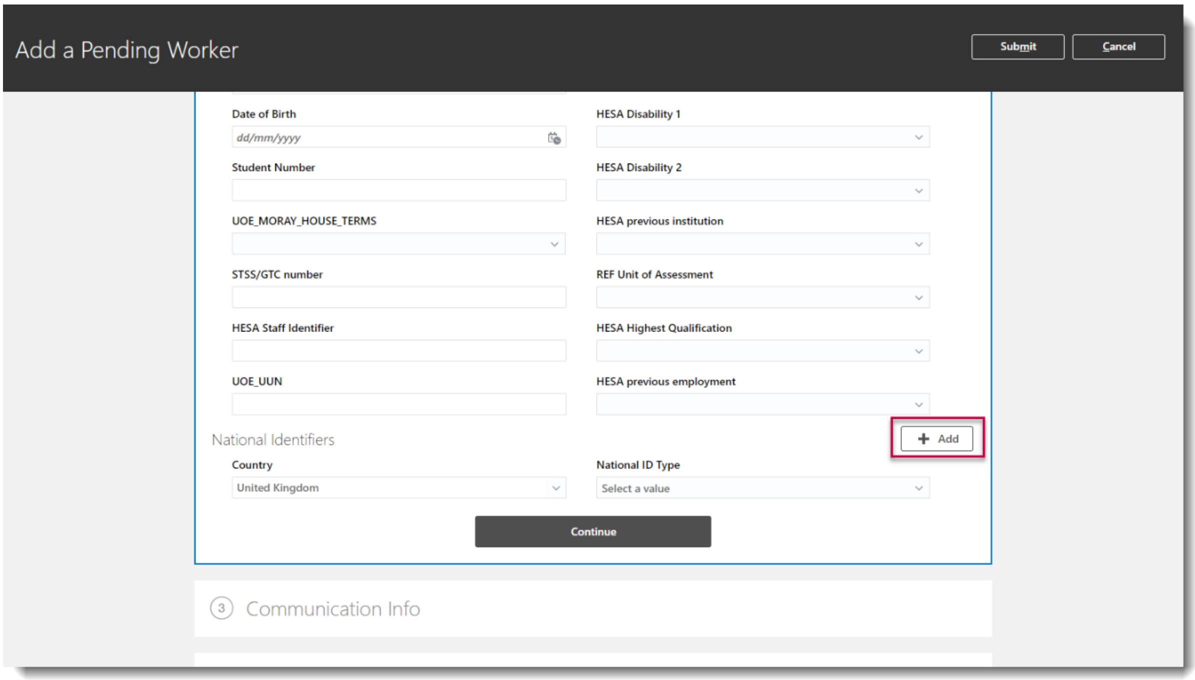
The new hire will be asked to complete other personal information at the pre boarding stage.
Note:

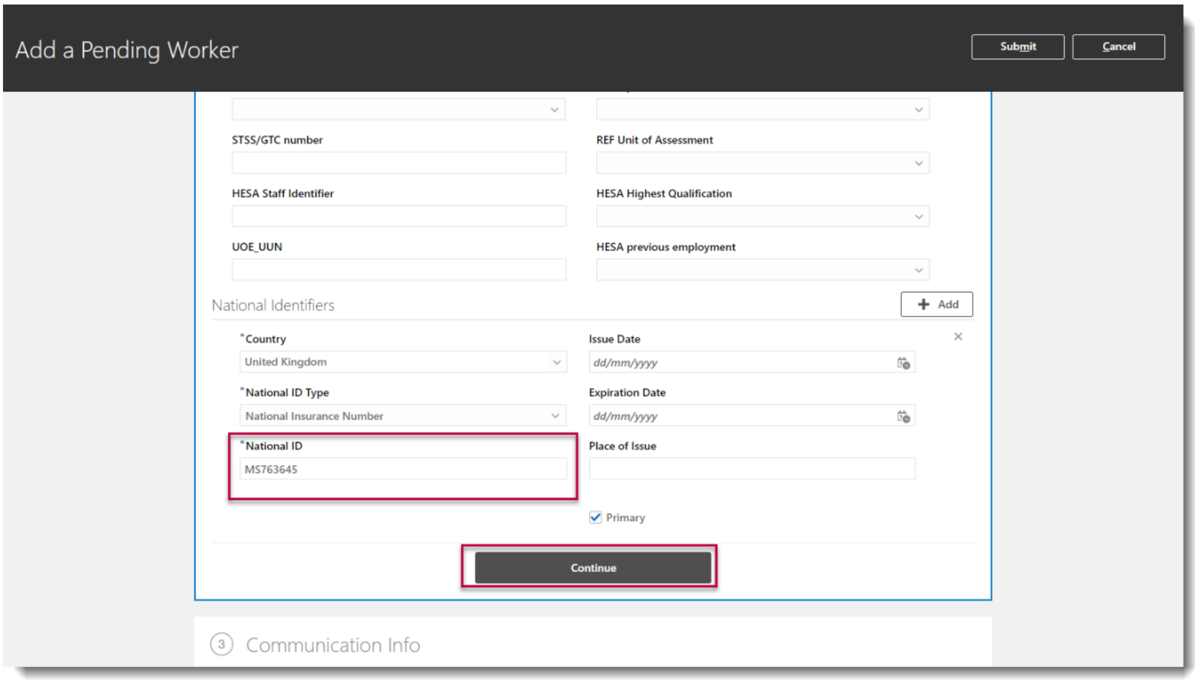
a. If the preferred name has not been provided, **please enter their first name**. Preferred name is used in People and Money, not first name. So omitting this will impact correspondence and how their name appears in the directory (which only shows preferred name).



b. The following fields **must not** be completed:
   - Student Number
   - UOE_MORAY_HOUSE_TERMS
   - STSS/GTC number
   - HESA Staff Identifier
   - UOE_UUN
   - HESA Disability 1
   - HESA Disability 2, 3, 4
   - HESA previous institution
   - REF Unit of Assessment
   - HESA Highest Qualification
   - HESA previous employment
   - Visitor Registration Number (Finance Use Only)

5. Click the **Add** button in the National Identifiers section, enter the **National Insurance Number** (if known), and then click **Continue**.

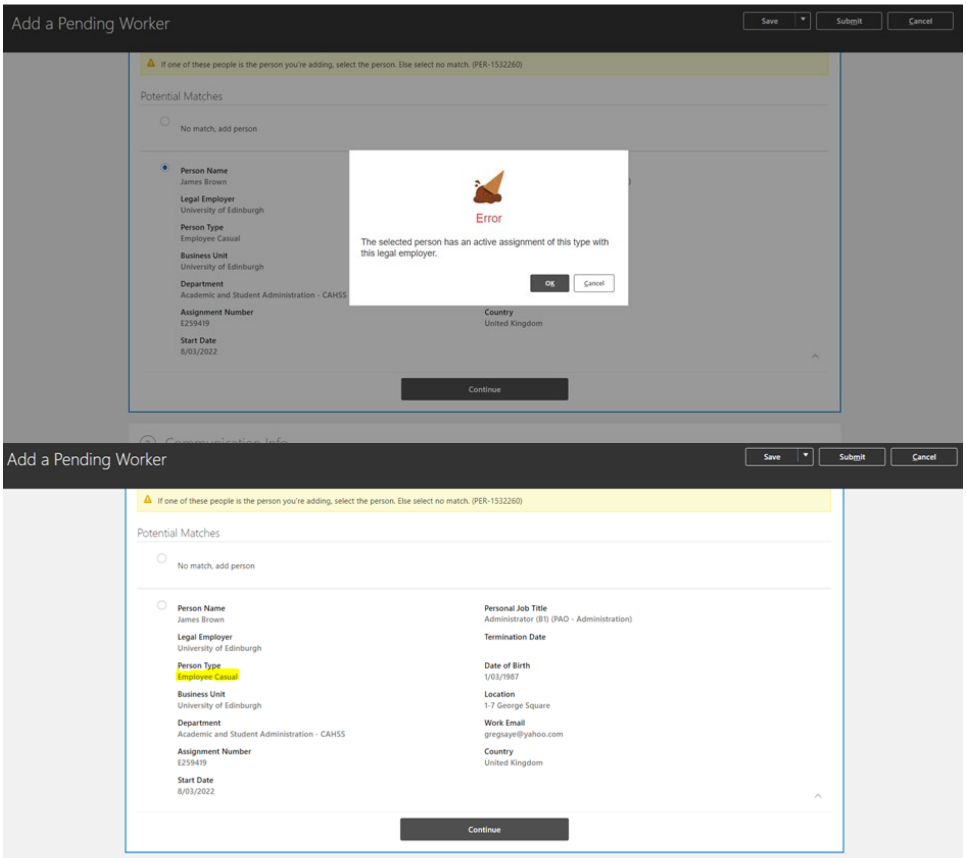




The duplicate worker check runs against the National Insurance Number. If you receive a message regarding Potential Matches see the steps below.

Checks you must carry out

At the point of the duplicate check, you may receive a warning message ‘The person has an active assignment of this type with the legal employer’, this means they are currently active on payroll. You must check the person type:



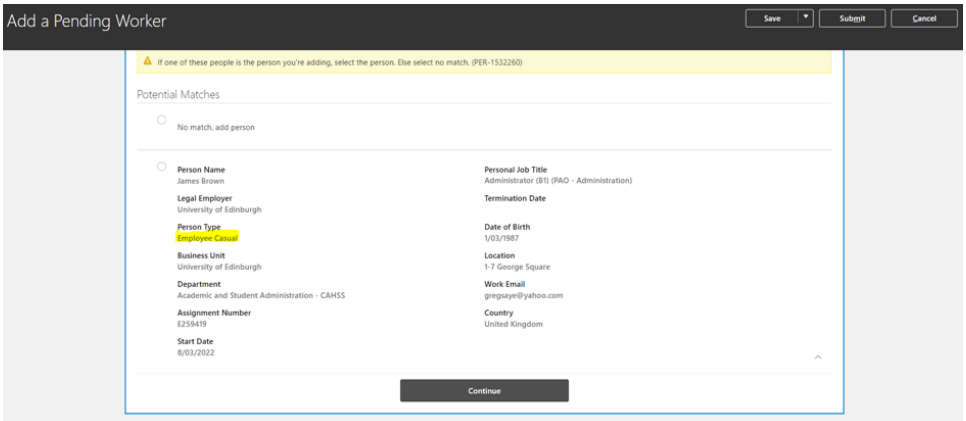
Person Type = Employee
Expand the section for the duplicate and check the Person Type field, if this is 'Employee' the **termination date is blank** and the person name matches the pending worker name, you will need to raise an Service Request (Internal Transfer to Advertised Post) attaching the Request for Transfer, Additional Post or Secondment Form and the approved Job Requisition Business Case.

If the name matches but there is a **termination date in the past** select the previous worker record and click **Continue, following the steps** for **Rehire a previous employee.**

If the hire has indicated that they have been previously employed by the university, the Person Type field is 'Employee' but has not provided a National Insurance number, please request this from the candidate before proceeding.

OR

Person Type = Employee Casual
If the Person Type – is 'Employee-Casual' and the termination date is in the future or blank and the person name matches you must submit a Service Request to HR Operations to have the termination date brought forward. Use the category Enquiry>Casual Worker. **Please title the SR 'URGENT Reverse Casual Termination', including the hire date.**



HR Operations will then reverse the termination and renter 2 days before the hire date.

There may be instances where more than one duplicate is found, when there is an active worker type 'employee casual' and an inactive (terminated) employee record. In this scenario, you should merge with the employee record and you do not need to submit the Service Request to reverse the casual termination date.

OR

Person Type = Contingent Worker

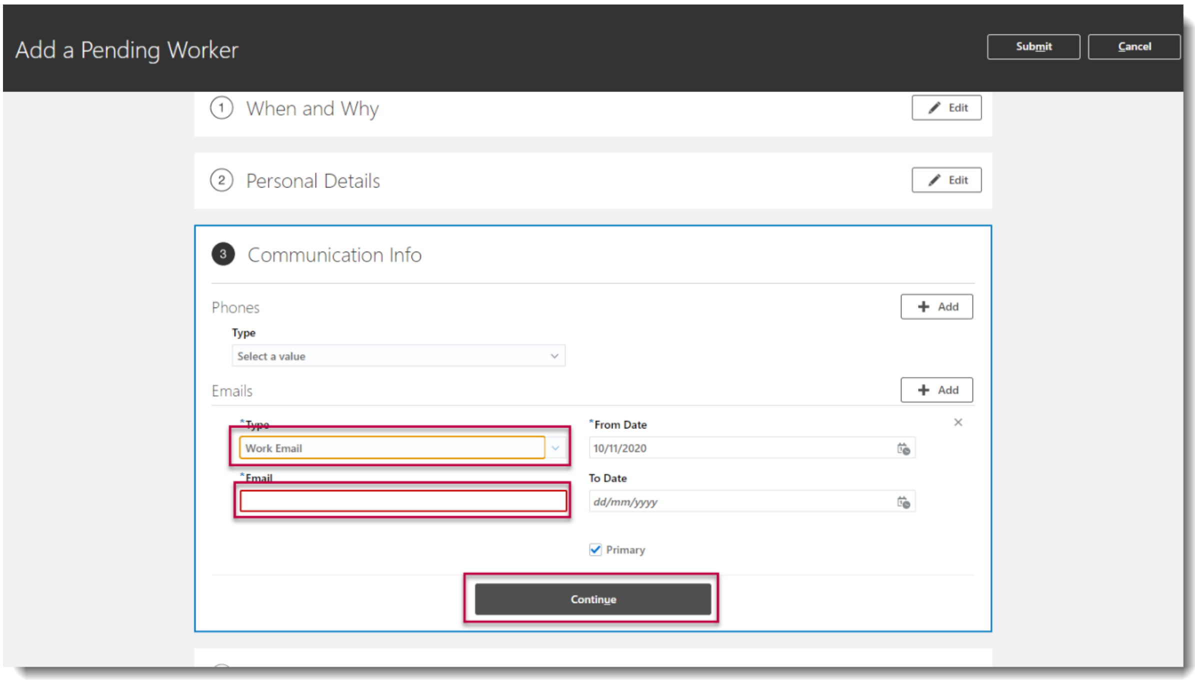
If the Person Type =Contingent Worker **select 'No match'**, add person and continue with the add pending worker process. You must NOT merge the duplicate worker records or it may impact the continuous service date for the worker.

Once this is complete, continue with add pending worker process, selecting the match to merge with existing record using the Action 'Add Pending Worker Relationship'.

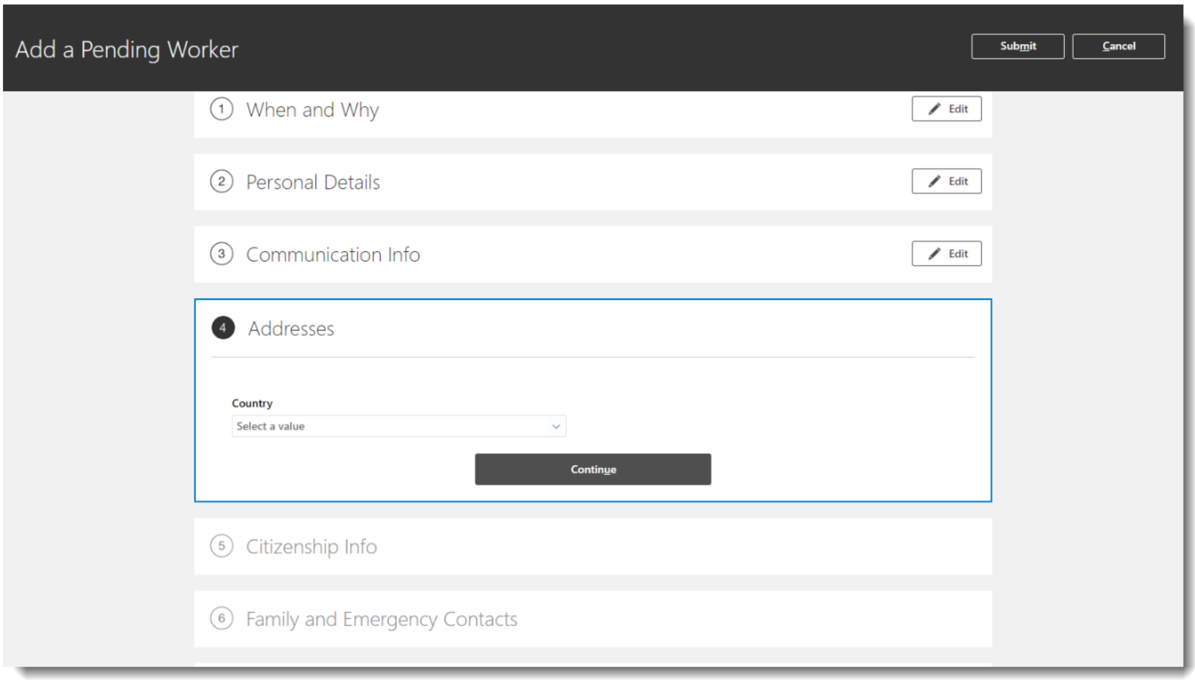
If the details do not match, click **No match, add person** then **Continue** and return to follow the create a pending worker process.

Further guidance on hiring a casual worker, external examiner, intermediary worker or taxable scholarship as an employee is available here.

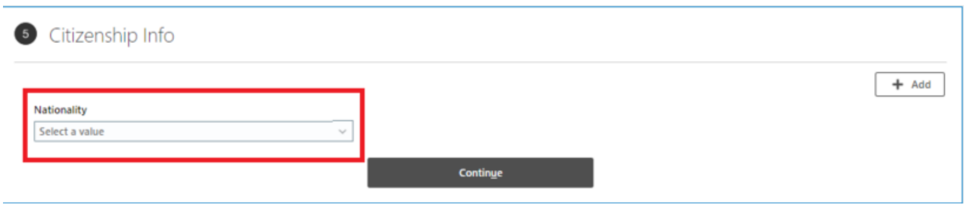
6. In the **Communication Info** section enter contact details for the new employee. A **personal email address** must be entered in both the personal email address and work email address field.



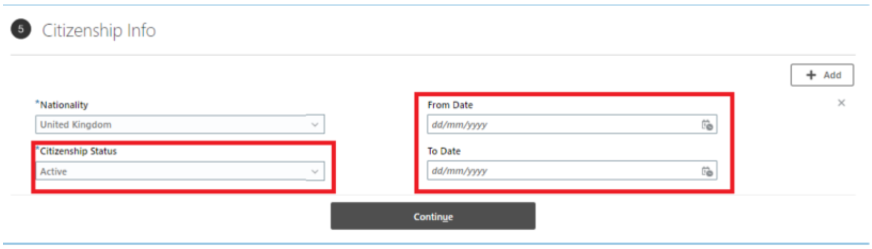
7. Add **Address** details. If not recorded here, the candidate is reminded to check and enter this information in a preboarding task however this information is required for payroll and pension purposes.



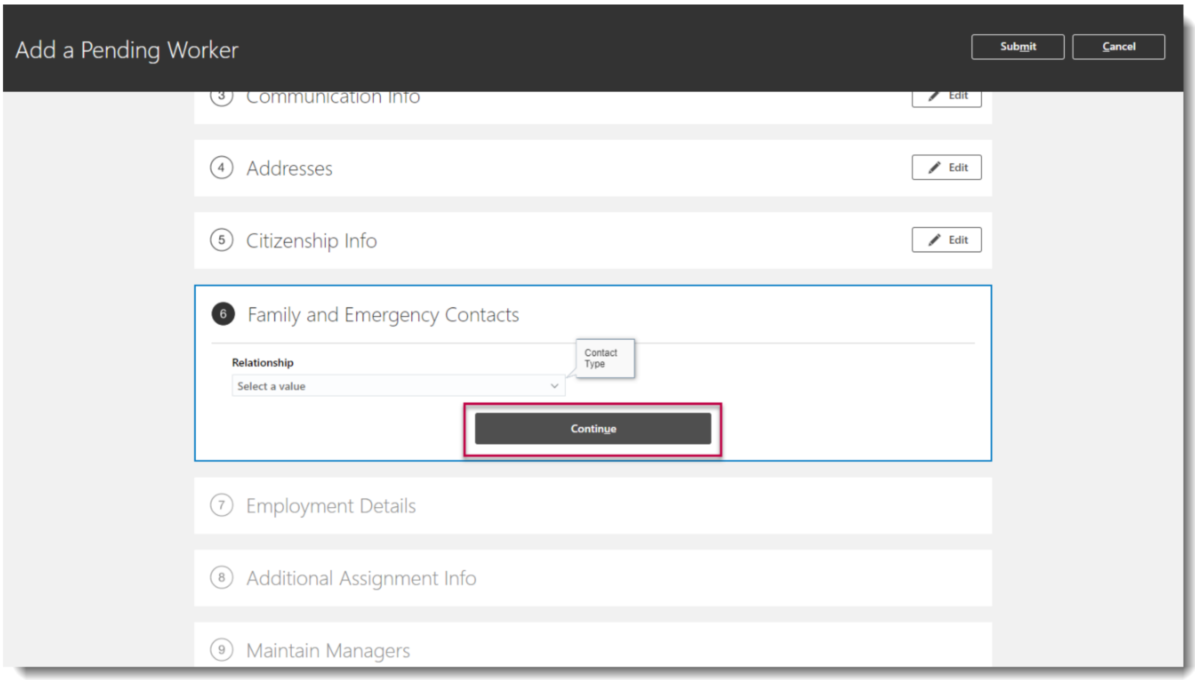
8. Add **citizenship info – select the nationality of the candidate from the drop down**



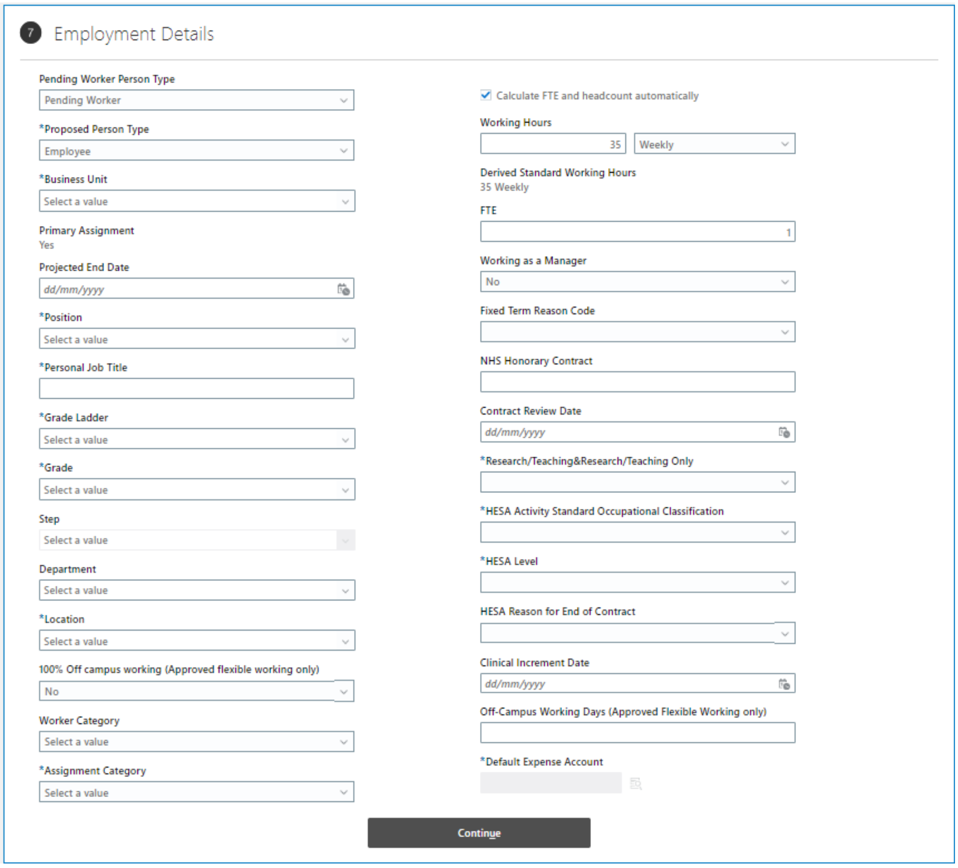
Then select **citizenship status** and a start date (and end date if applicable). To add more than one nationality click add. Then **Click continue**



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 complete the fields marked with a * as these are mandatory, others should be completed depending on contract type



Field Name	Guidance for completion
Pending Worker Person Type	Pending Worker
Proposed Person Type*	Employee
Business Unit*	Select relevant BU
Projected End Date	For fixed term contracts please provide
Position*	Please provide the position name, guidance on this is available in the Guide to Job Classifications and Position Management
Personal Job Title*	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
Grade Ladder*	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.
Grade*	As above
Step	Grade Step
Department	Select the relevant department
Location*	Location where employee will be based
Worker Category	Select the relevant worker category e.g Guaranteed Hours
100% Off campus working	Yes or No - Only to be updated to ‘Yes’ where it has been agreed that the employee will work 100% of time off campus as per the flexible working policy.
Assignment Category*	Select the appropriate from the dropdown, e.g open ended, fixed term
Working Hours	Defaults to 35 per week but can be amended, must be a weekly figure.

	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.
FTE	Automatically populates based on Working Hours
Working as a Manager	Yes/No
Fixed Term Reason Code	Must be provided for fixed term contracts.
NHS Honorary Contract	If applicable
Contract review Date	If applicable
Research/Teaching&Research/ Teaching only*	**1 - Academic Contract that is teaching only** (applies only to contracts indicating that staff are teaching only. Teaching should include all related activities such as tutoring and preparation). **2 - Academic Contract that is research only** (should be used for those contracts where the primary academic employment function is research only, even though the contract may include a limited number of hours teaching (up to 6 hours per week or pro-rata for part-time staff). **3 - Academic contract that is both teaching and research (**applies to contracts that include 6 or more hours of teaching per week (averaged over the number of actual teaching weeks) as a minimum (pro-rata for part-time staff) and the remaining contract hours as research only). **4 - Non academic contract** **9 - Academic Contract that is neither teaching nor research** (should be used for academic contracts where the primary employment function is not teaching and/or research). If a contract is for both academic and non-academic work then the appropriate code from 1 to 3 should only be used where the primary employment function is teaching and/or research.
HESA Activity Standard Occupational Classification*	HESA Activity Standard Occupational Classification-select the appropriate option. For subsidiaries please select the code which matches closest the type of role. For subsidiaries this information will not be returned as part of the HESA submission For HESA Standard Occupational Classification information view this link [Staff 2023/24 - Activity Standard Occupational Classification | HESA]
HESA Level*	This is now a mandatory field, please use the table below to select the appropriate HESA level according to the grade of the position being offered. Note staff in subsidiaries should use 'XpertHR Level N' in all instances
Clinical Increment Date	If applicable
Off Campus Working Days (Approved Flexible Working Only).	If a Flexible Working arrangement agreed (as per the Flexible Working Policy) please enter the days of the week the employee will be working off campus, e.g. Monday and Friday every week. If they will be working set days off campus over a different pattern to weekly (e.g fortnightly) please provide the details in this section (e.g. every other Friday from home). **Note** - It is important to provide this information here as this will provide HR Operations with the details required for the contract when it is requested. This field has a **150 character limit.**

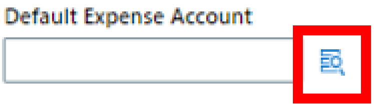
Default Expense Account Code*	Must be added – please refer to the approved Job Requisition Business Case Form. Please note in most circumstances the default expense account code will be the same as the salary costing code. The default expense code cannot be split.

HESA LEVEL

STAFF LEVEL CODE	STAFF LEVEL DESCRIPTION	GRADES ASSIGNED TO STAFF LEVEL CODE	ADDITIONAL CRITERIA
A0	Vice-Chancellor/Principal/Head of Initiation	Principal only	
B0	UCEA level 2	Vice-Principal/University Secretary	
C1	UCEA level 3A	Report to run by HR to identify this grouping	
C2	UCEA level 3B	College Registrar	
D1	UCEA level 3/4A1	Report to run by HR to identify this grouping	
D2	UCEA level 3/4A2	Report to run by HR to identify this grouping	
D3	UCEA level 3/4A3	Report to run by HR to identify this grouping	
E1	UCEA level 4A	XM1	
E2	UCEA level 4B	Report to run by HR to identify this grouping	
F1	UCEA level 5A	AC4, AM4, ACN4, AMN4, ACT4, AMT4 UE10 / OTHS **Academic** staff	
F2	UCEA level 5B	UE10 / OTHS **Non-Academic** staff (e.g. Professional services staff)	
I0	XpertHR level I	UE09, ECA8, AC3A, AC3B, ACN3, ACT3, AM3A, AM3B, AMN3, AMT3, ARW2, XM2A, XM2B	ARC ON SPINAL POINT 39, 40, 40, 44, 45, 46, 54, 58, 62, 66
J0	XpertHR level J	UE08, ECA7, AC2, AM2, ACN2, AMN2, ARW1, MC3, XM3A, XM3B, RCB3	ARC ON SPINAL POINT 37, 38, 49, 50, 60, 61, 65
K0	XpertHR level K	UE07, UE7N, ECA6, MC2, AFC7, ECA6, XM4A, XM4B, RCB4	ARC ON SPINAL POINT 29, 30, 30, 36, 41, 42, 47, 48, 51, 52, 53, 55, 56, 57, 59, 63, 64
L0	XpertHR level L	UE06, UE6N, ECA5, SDS1, MCA, MC1, AFC6, ECA5, XM5A, XM5B, RCB5, K375	
M0	XpertHR level M	UE05, UE04, UE5N, ECA4, AFC5, RCB6, XM6B	
N0	XpertHR level N	UE03, TR01, ECA3, MA1, MA3, RCB7, XM6A	
O0	XpertHR level O	UE02, ECA2, RCB8	
P0	XpertHR level P	UE01, ECA1	

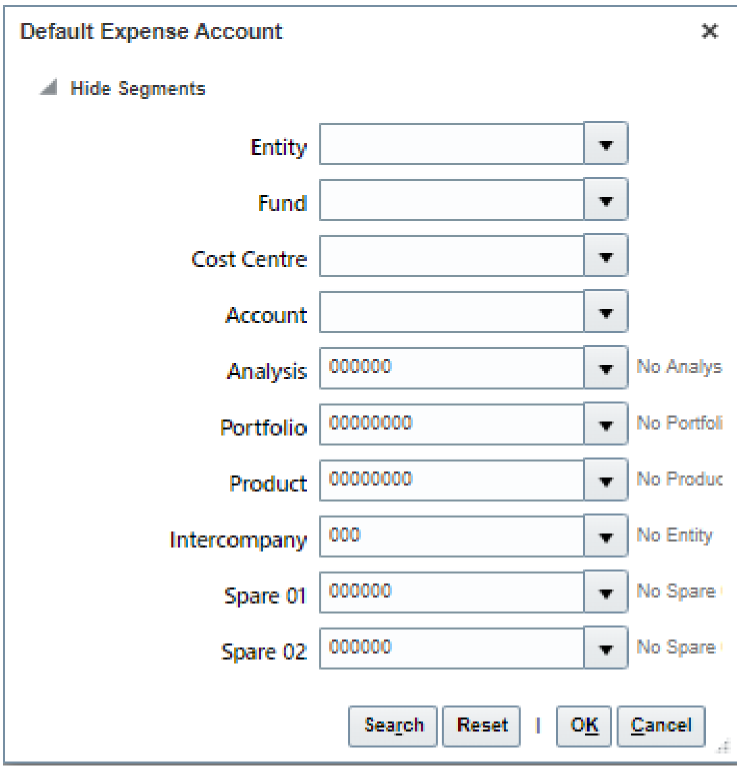
Default Expense Account Code

These are mandatory fields. Select the icon at the right of the field.



Complete all fields as per the details under 'Default Expense Account Code' on the approved Job Requisition Business Case form. Then press OK. The table below shows the default values, you must use the **cost centre relating to the school or department.**

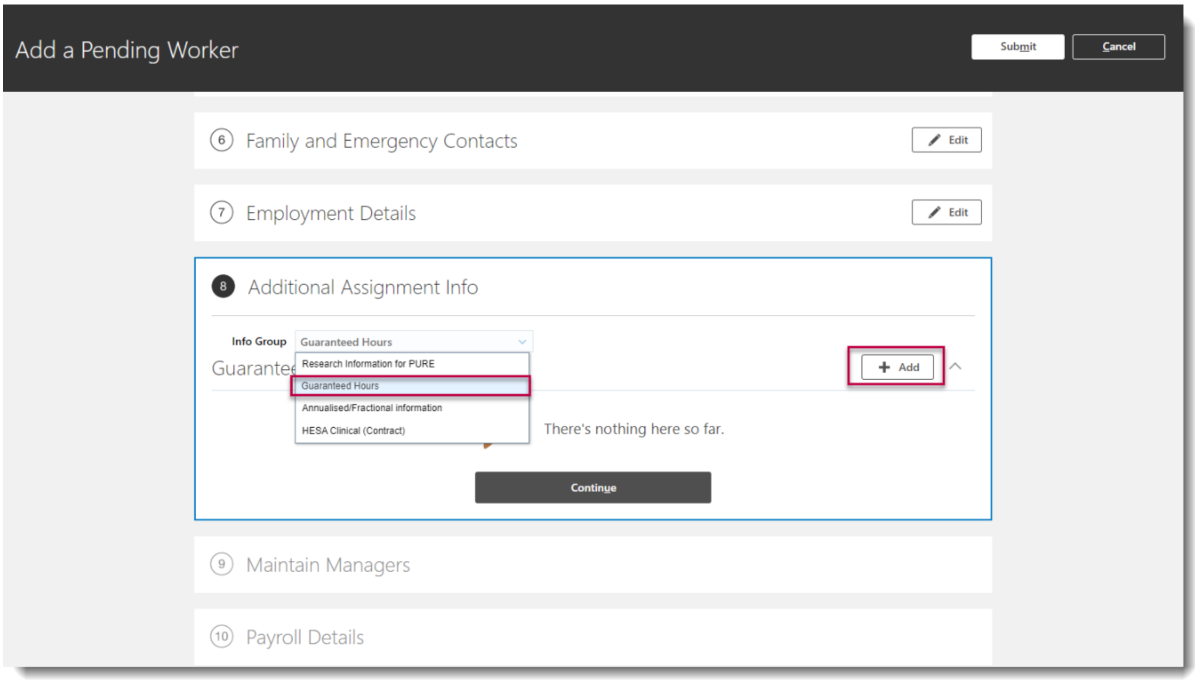
	Code to use
Entity	110
Fund	110002
Cost Centre	**From the JRBC Form**
Account	2410
Analysis	000000
Portfolio	00000000
Product	00000000
Intercompany	000

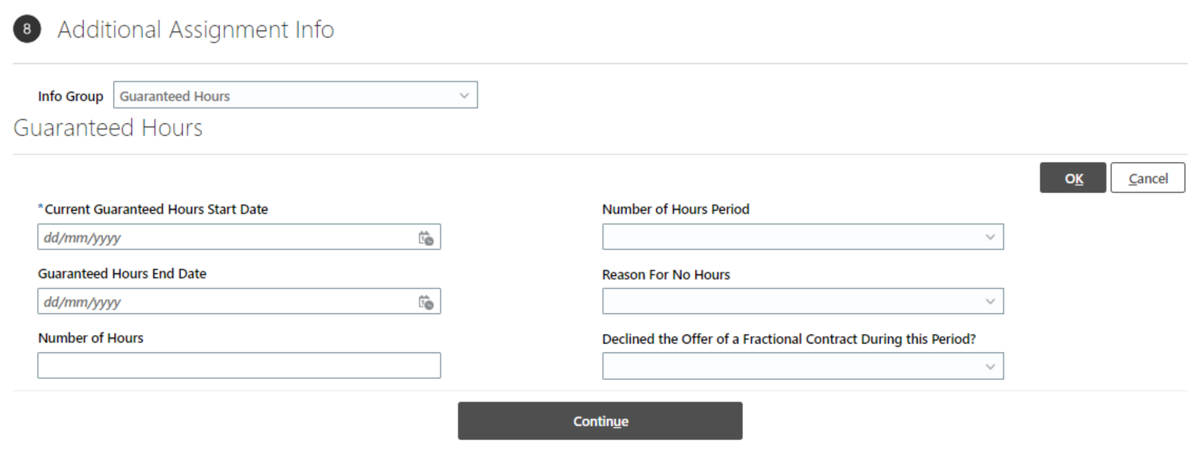


Then, press **Continue**

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 (please note the information entered here feeds the GH App)



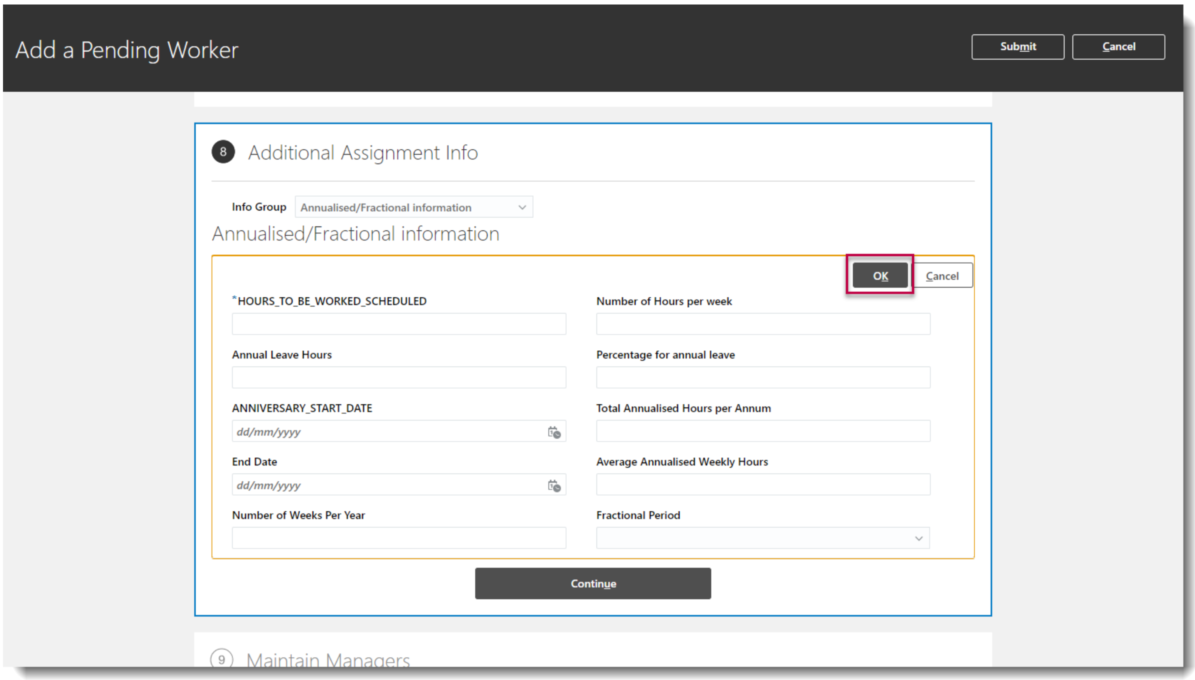


- **Current Guaranteed Hours Start date field** - enter the same as the contract start date
- **Guaranteed Hours End date field** - enter the GH Period end date
- **Number of Hours field** - enter the minimum hours to be guaranteed in the initial GH period.
- **Number of Hours Period field** - select from one of the available drop down options (see Appendix 2 for guidance and description). **Please note you should only select one of the following options:**

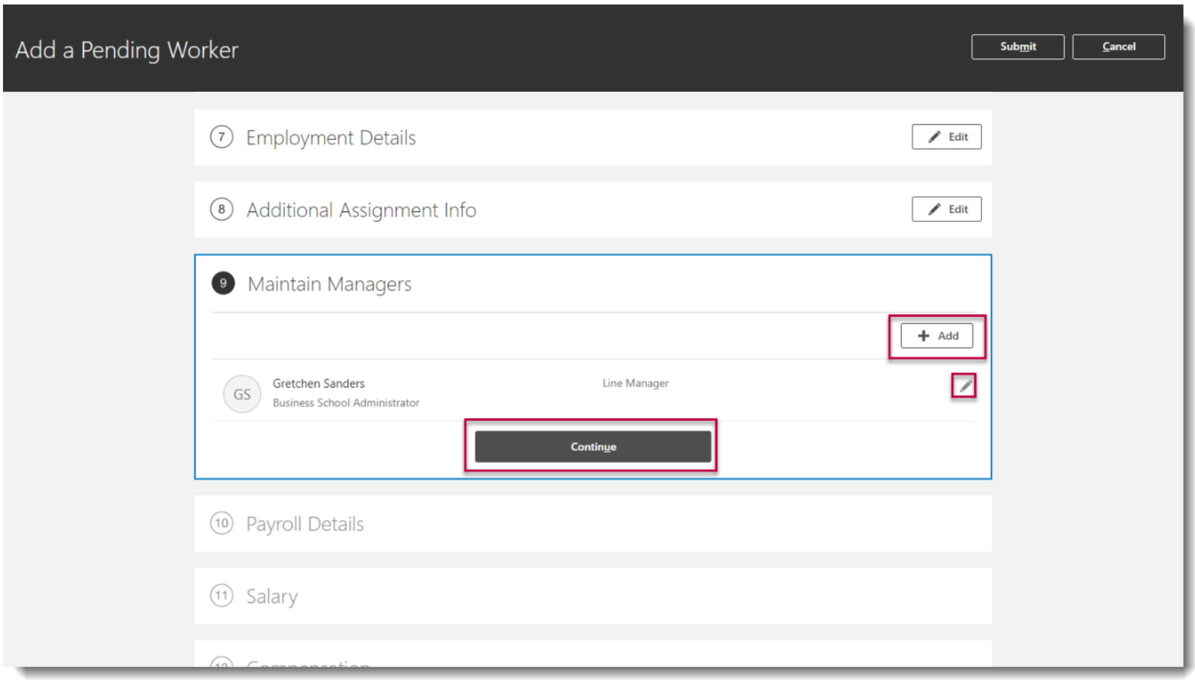
- **Per Year = if the contract is for a year or longer**
- **Over Period of GHC = if the contract is for less than a year**

- **Reason for No Hours** – do not enter anything here (HR Ops use only)
- **Declined the Offer of a Fractional Contract** – do not enter anything here (HR Ops use only)

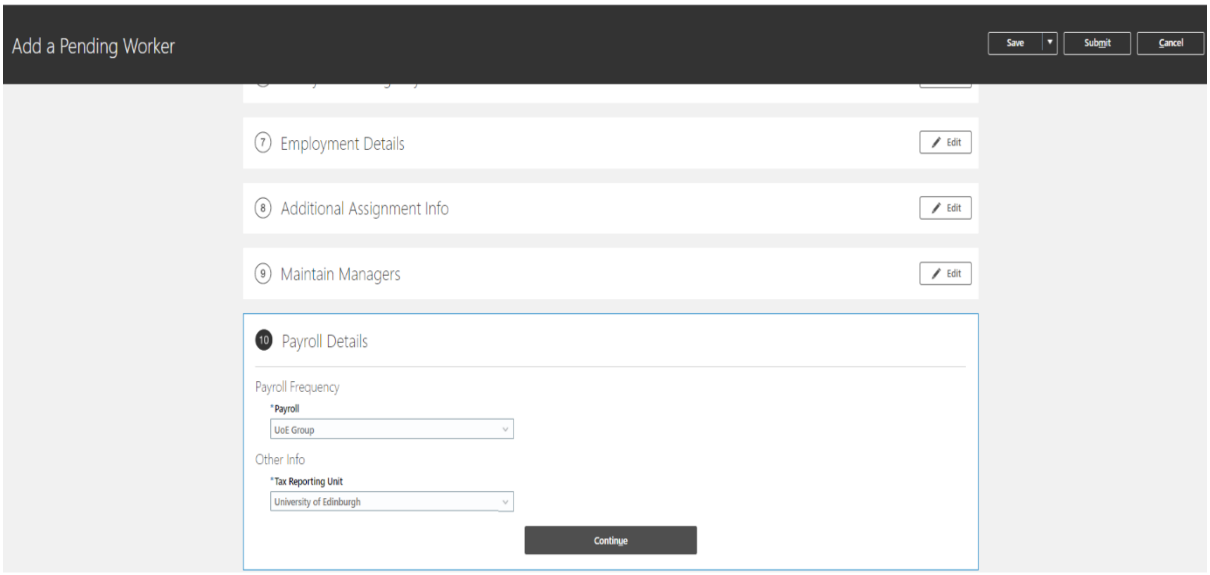
Annualised/Fractional Information



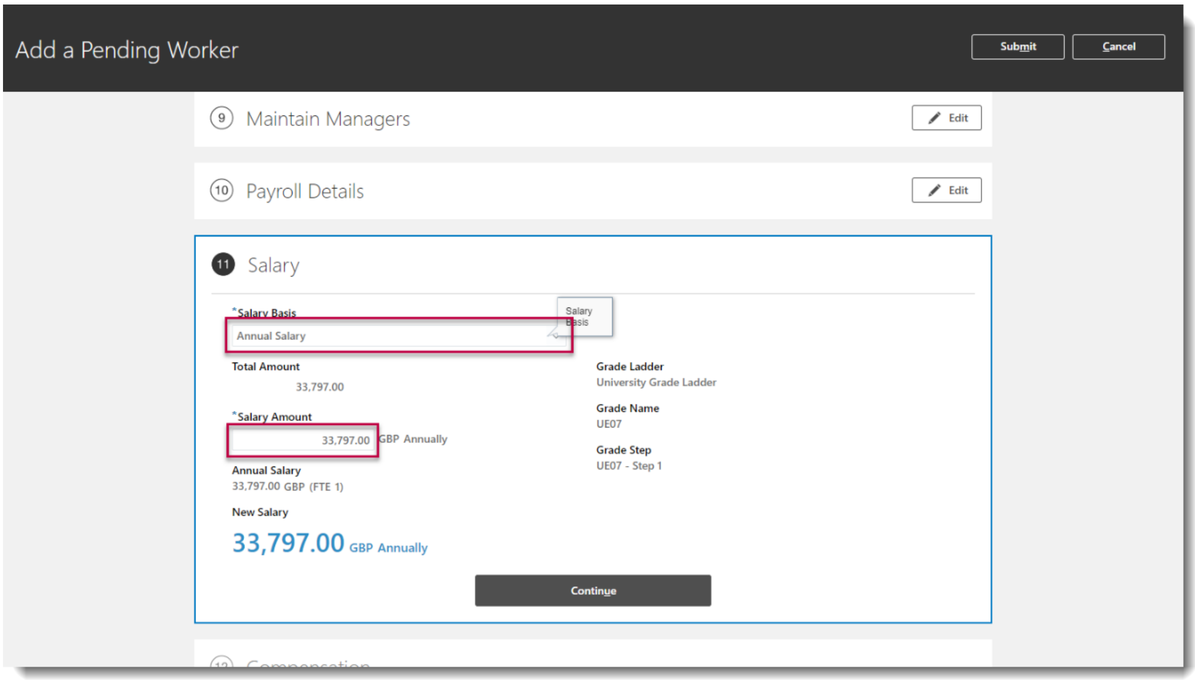
12. In the **Maintain Managers** section, **Add** or **Edit** the line manager of the new hire as needed, then select **Continue.**



13. In the **Payroll** section select UoE Group in the **Payroll Frequency** section then select **University of Edinburgh** as the **Tax Reporting Unit.** Click **Continue.**



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



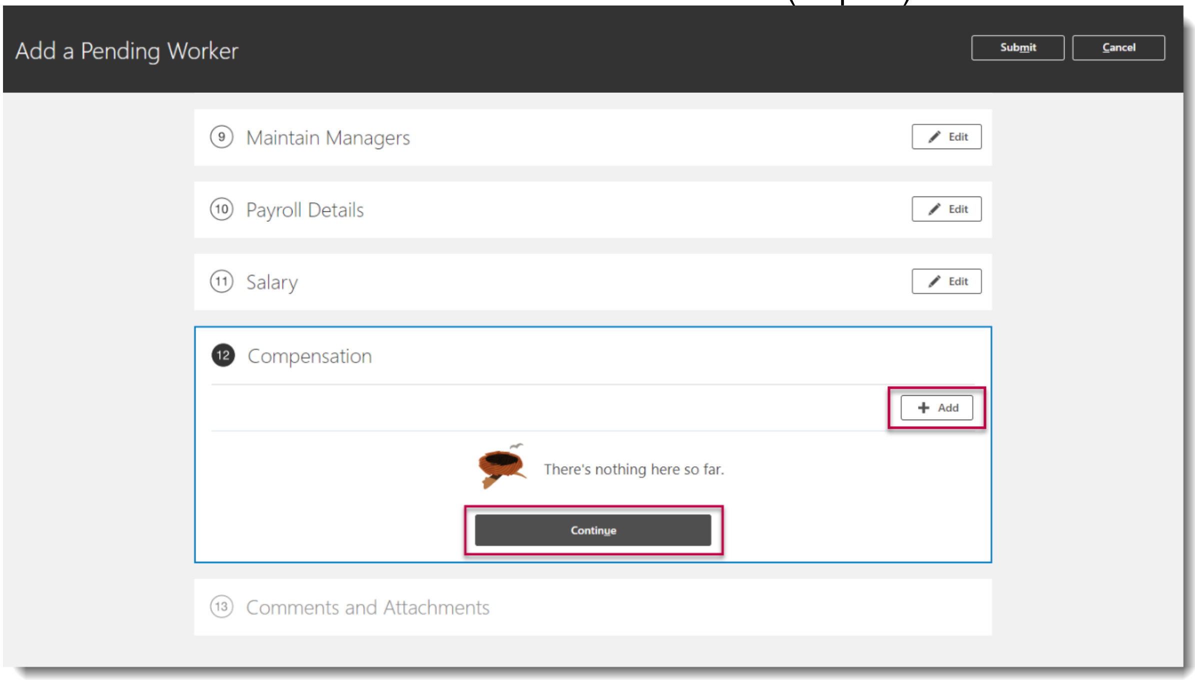
The salary amount should populate for all on-scale salaries. If this is an off-scale salary, populate the **Salary Amount** field as appropriate.

15. Update the **Compensation** section if any additional allowances are to be added. There are 14 allowance types that can be selected:

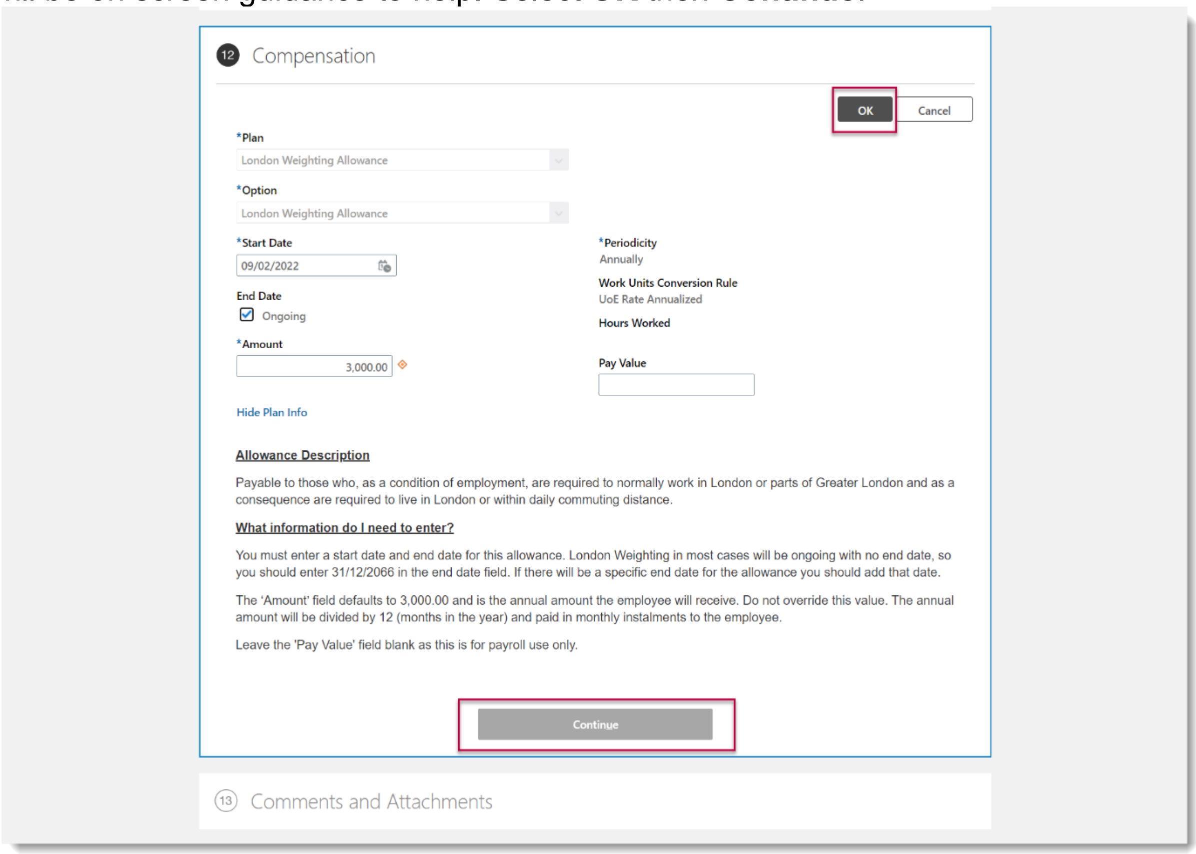
- Acting Up Allowance
- Contractual Overtime
- Deans Honorarium
- Head of School
- London Weighting Allowance
- On Call Payment
- Overseas Supplement
- Premium Bands
- Responsibility Allowance
- Royal Society Award
- Secondment Allowance
- Wardens Allowance
- Wellcome Trust Allowance
- Wellcome Trust Fellowship

You can bypass this by clicking **Continue** if there is no allowance to add.

To add an allowance, select **Add**. If the allowance you require is not listed please include this information in the comments section below (step 16).

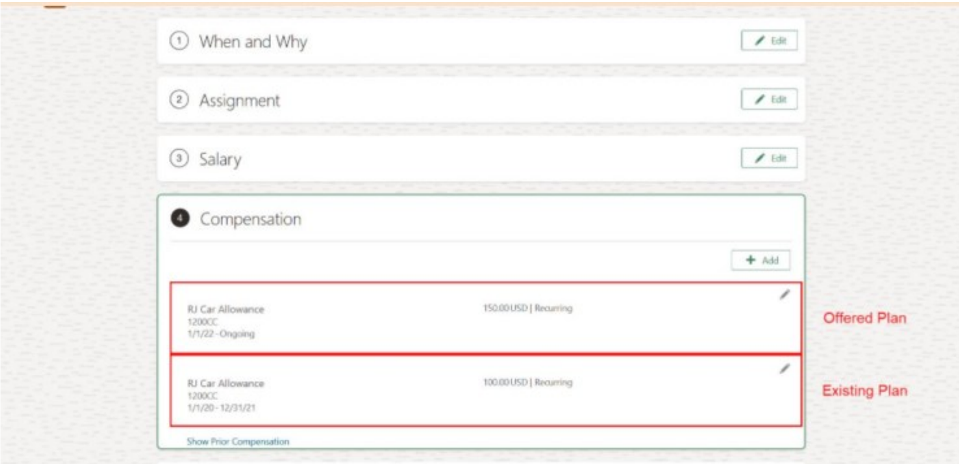


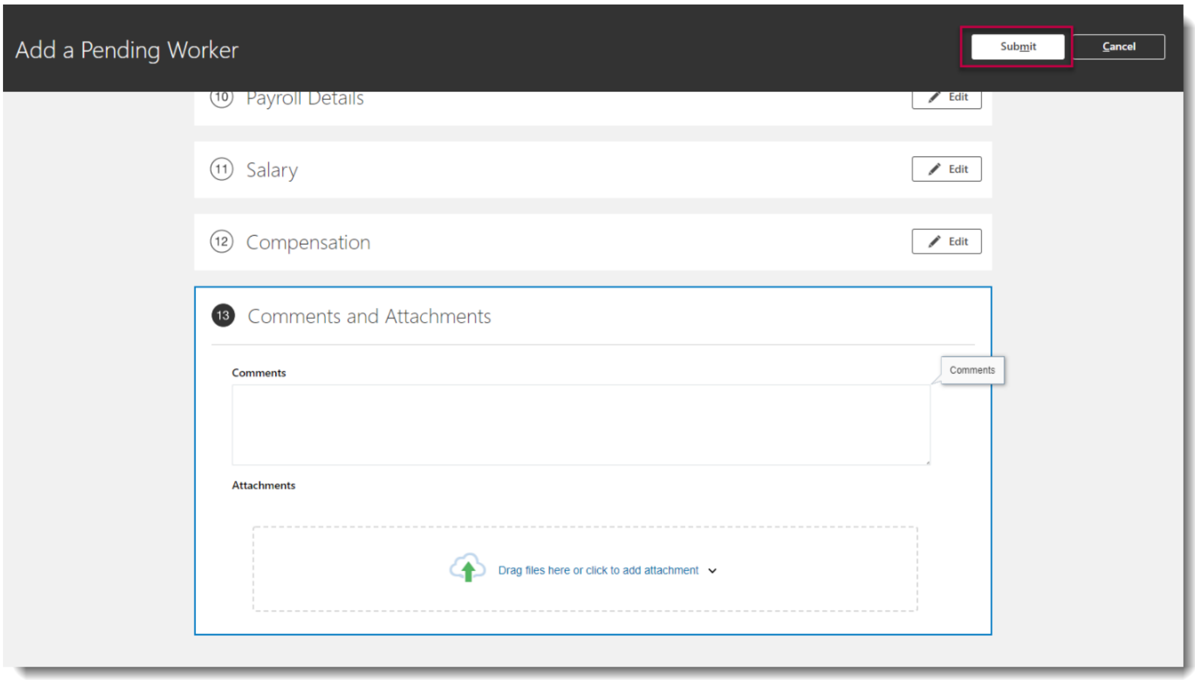
Select the 'Plan' (Allowance). The example shown is the addition of a London weighting. The screen will vary depending on the allowance selected. There will be on screen guidance to help. Select **OK** then **Continue**.



16. Add any comments and upload the completed Job Requisition Business Case form and New Appointee Information Form to the **Comments and Attachments** section then click **Submit.** Please also use this section to list any allowances not able to select in step 15, and use this to provide any supporting documentation/rationale for the allowance.

If more than one allowance is required click add to enter this and repeat the steps as above

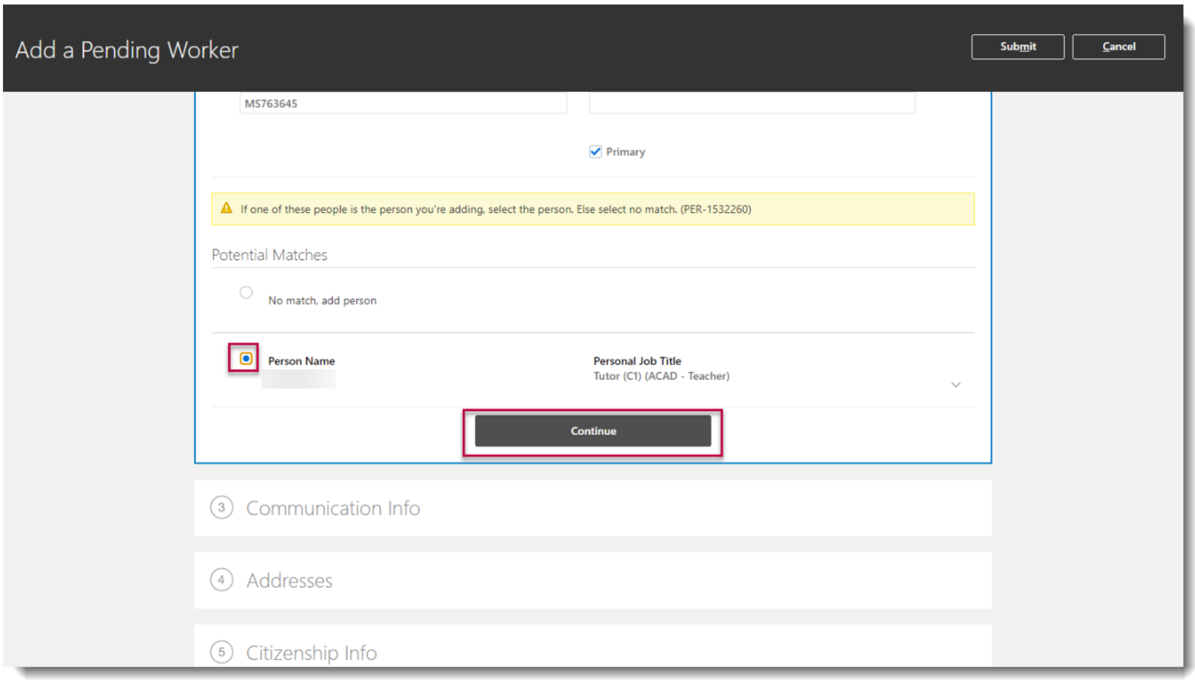




Once approved the onboarding Journey 'Welcome to the University of Edinburgh' will be automatically assigned.

Rehire a previous employee

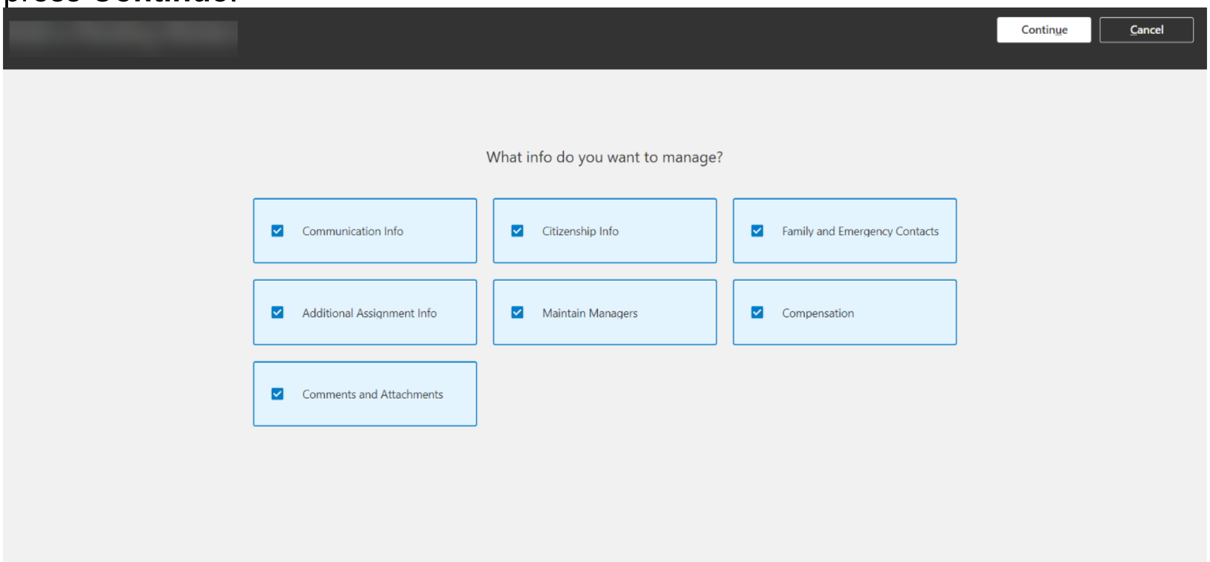
If the National Insurance Number matches one held for a previous employee and the Person Name matches the pending worker name, select the previous worker record and click **Continue.**



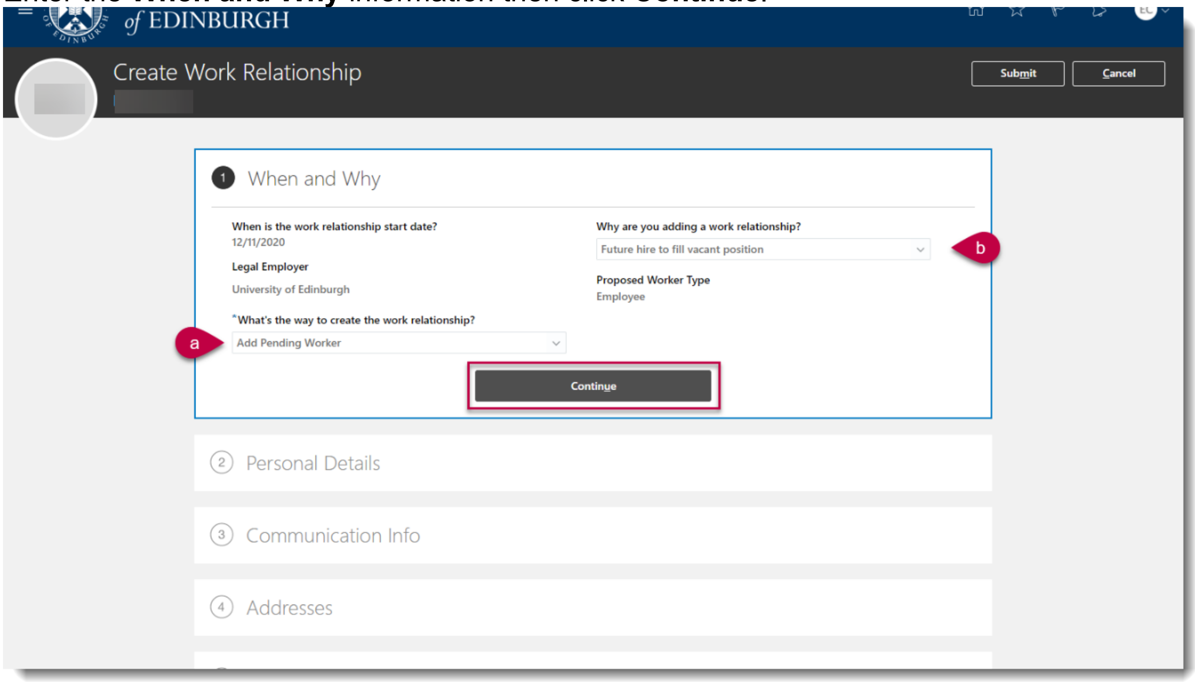
If the names, do not match confirm the National Insurance Number is correct. If necessary, click **No match, add person** then **Continue** and return to follow the create a pending worker process.

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

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

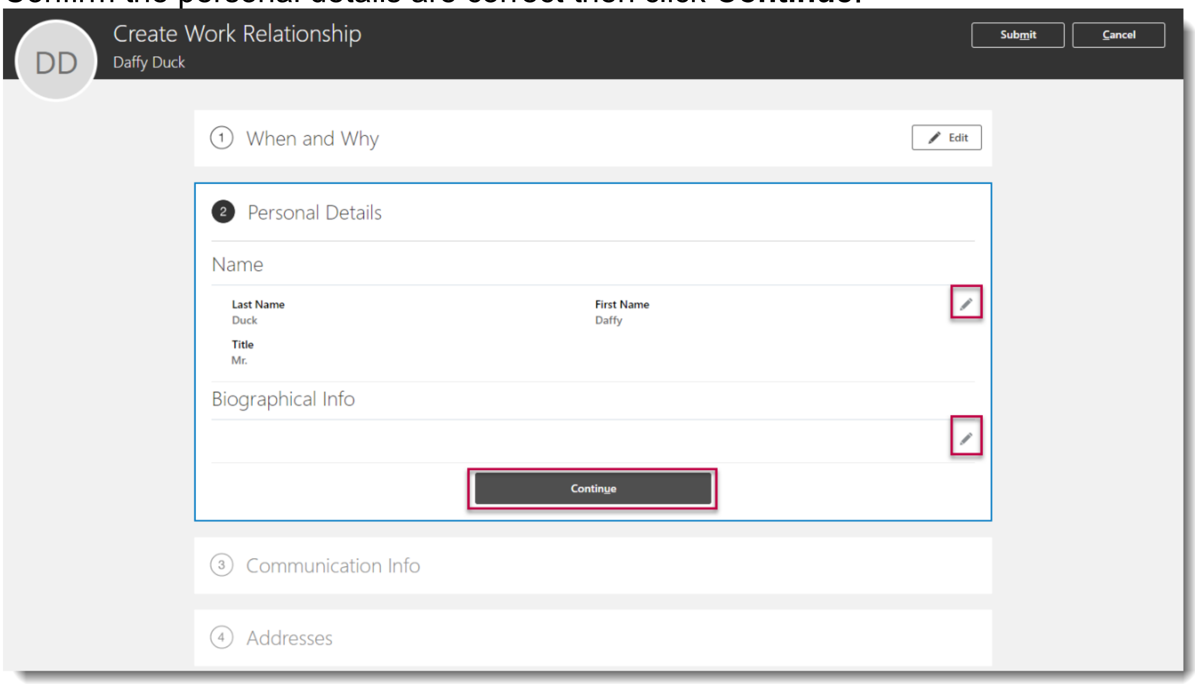


3. Enter the **When and Why** information then click **Continue**.



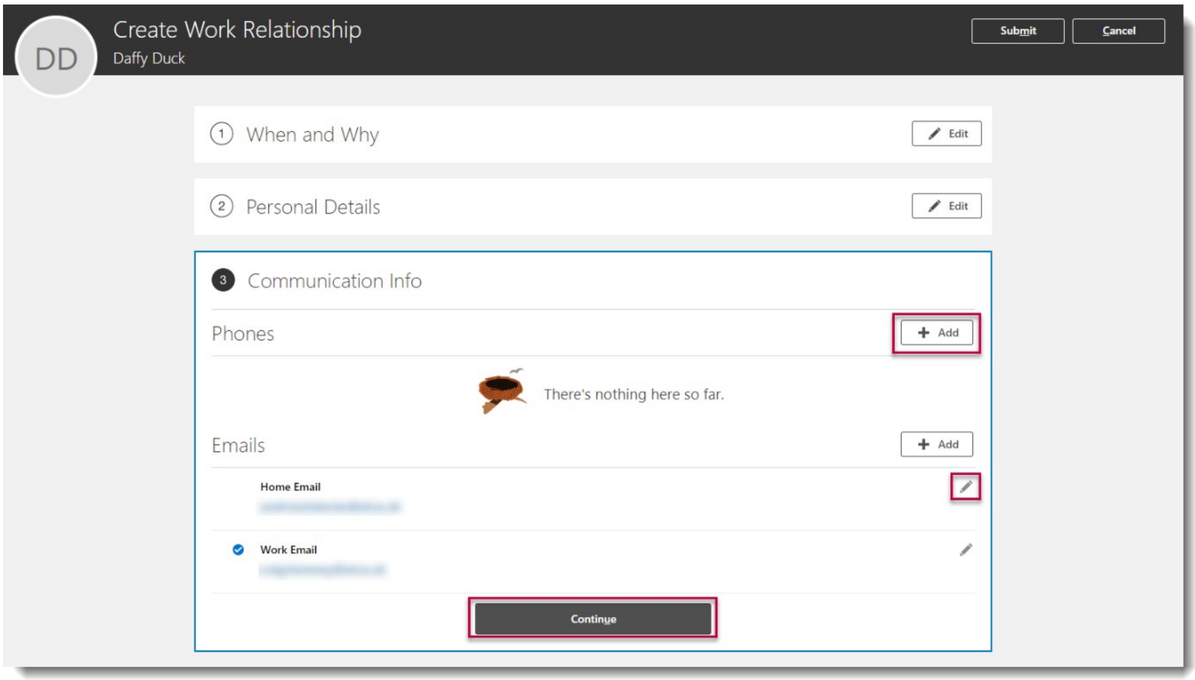
a) **What's the way to create the work relationship?** – select **Add a Pending Worker (if there is already a pending worker record please select add pending worker relationship)**
b) **Why are you adding a work relationship?** – select **Future Hire to fill vacant position**

4. Confirm the personal details are correct then click **Continue**.

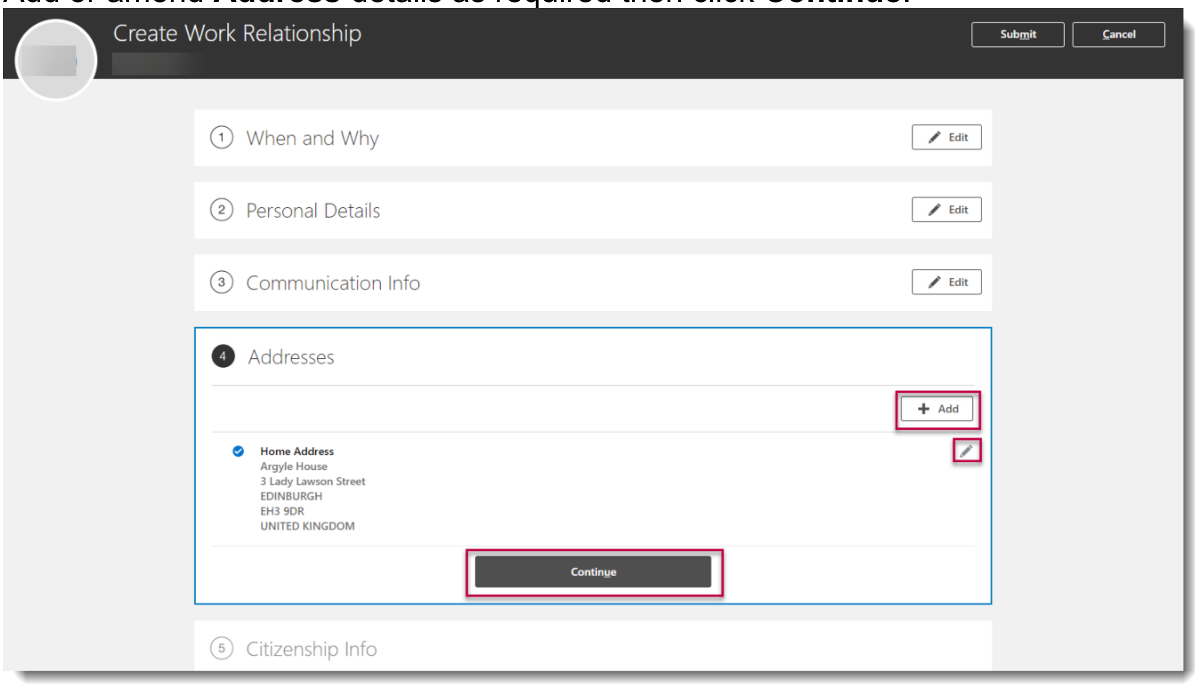


Where necessary, click the edit icon to amend information.

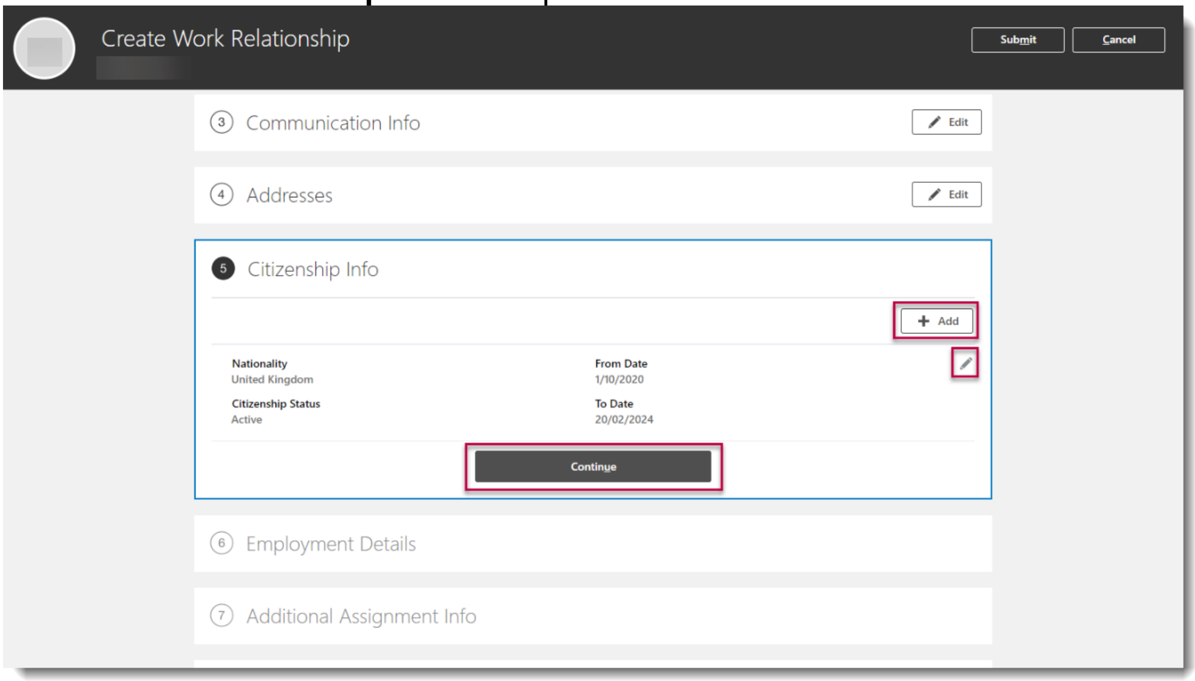
5. **Communication Info** - Rehires may already have a work email address which you cannot amend. If this field is blank please add the personal email address. In the home email field please add the personal email address for the hire. Add or amend other Communication Info as required then click **Continue.**



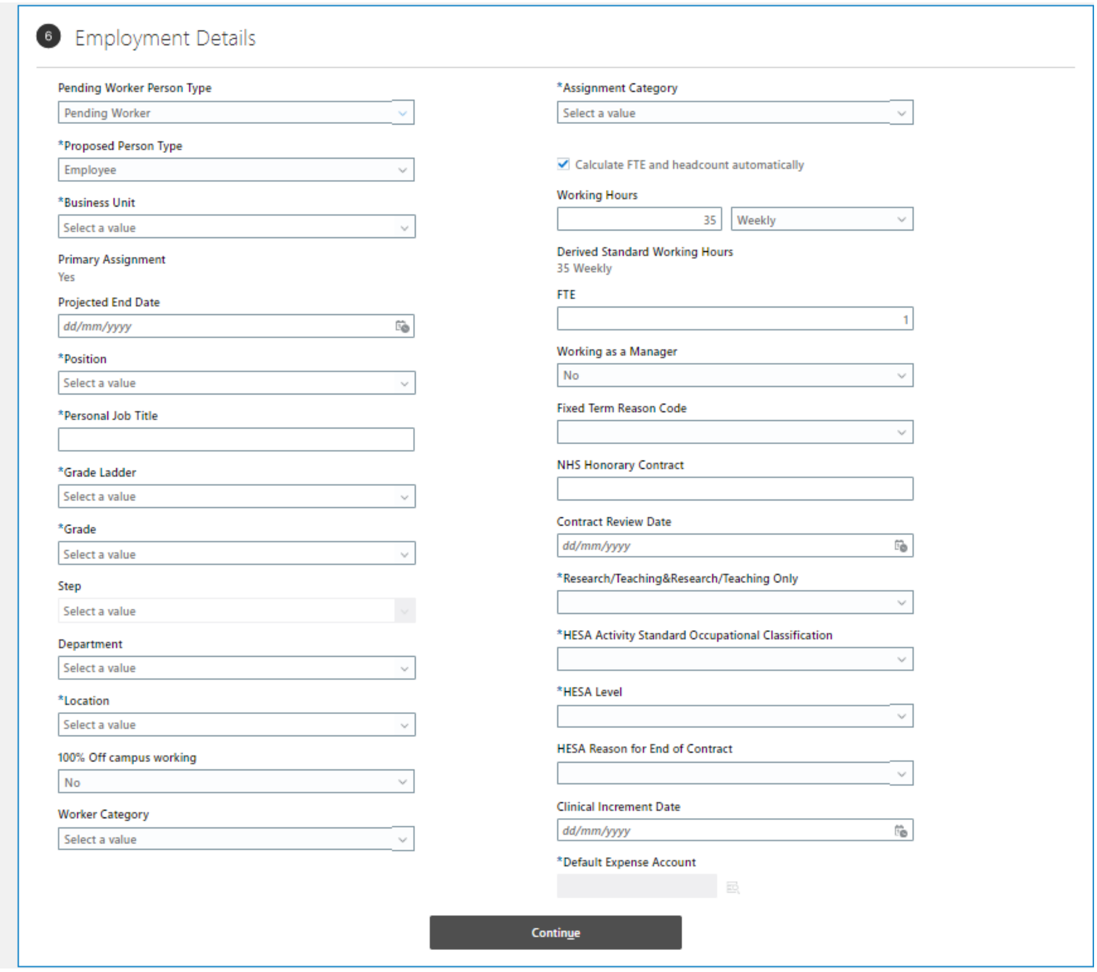
6. Add or amend **Address** details as required then click **Continue**.



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



8. In the **Employment Details** section complete the fields marked with a * as these are mandatory, others should be completed depending on contract type.



Field Name	Guidance for completion
Pending Worker Person Type	Pending Worker
Proposed Person Type*	Employee
Business Unit*	Select relevant BU
Projected End Date	For fixed term contracts please provide
Position*	Please provide the position name, guidance on this is available in the Guide to Job Classifications and Position Management
Personal Job Title*	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
Grade Ladder*	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.
Grade*	As above
Step	Grade Step
Department	Select the relevant department
Location*	Location where employee will be based

100% Off campus working.	Yes or No - Only to be updated to 'Yes' where it has been agreed that the employee will work 100% of time off campus as per the flexible working policy.
Worker Category	Select the relevant worker category e.g Guaranteed Hours
Assignment Category*	Select the appropriate from the dropdown, e.g open ended, fixed term
Working Hours	Defaults to 35 per week but can be amended, must be a weekly figure. 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.
FTE	Automatically populates based on Working Hours
Working as a Manager	Yes/No
Fixed Term Reason Code	Must be provided for fixed term contracts.
NHS Honorary Contract	If applicable
Contract review Date	If applicable
Research/Teaching&Research/ Teaching only*	1 - Academic Contract that is teaching only 2 - Academic Contract that is research only 3 - Academic contract that is both teaching and research 4 - Non academic contract 9 - Academic Contract that is neither teaching nor research
HESA Activity Standard Occupational Classification*	HESA Activity Standard Occupational Classification-select the appropriate option. For subsidiaries please select the code which matches closest the type of role. For subsidiaries this information will not be returned as part of the HESA submission For HESA Standard Occupational Classification information for 2019/2020 click here.
Level*	This is now a mandatory field, please use the table below to select the appropriate Level according to the grade of the position being offered.
Clinical Increment Date	If applicable
Off Campus Working Days (Approved Flexible Working Only).	If a Flexible Working arrangement agreed (as per the Flexible Working Policy) please enter the days of the week the employee will be working off campus, e.g. Monday and Friday every week. If they will be working set days off campus over a different pattern to weekly (e.g fortnightly) please provide the details in this section (e.g. every other Friday from home). **Note -** It is important to provide this information here as this will provide HR Operations with the details required for the contract when it is requested. This field has a **150 character limit**
Default Expense Account Code* (see below for further guidance)	Must be added – please refer to the approved Job Requisition Business Case Form.

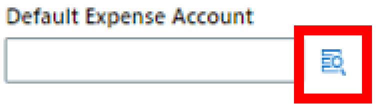
	Please note in most circumstances the default expense account code will be the same as the salary costing code. The default expense code cannot be split.

HESA LEVEL

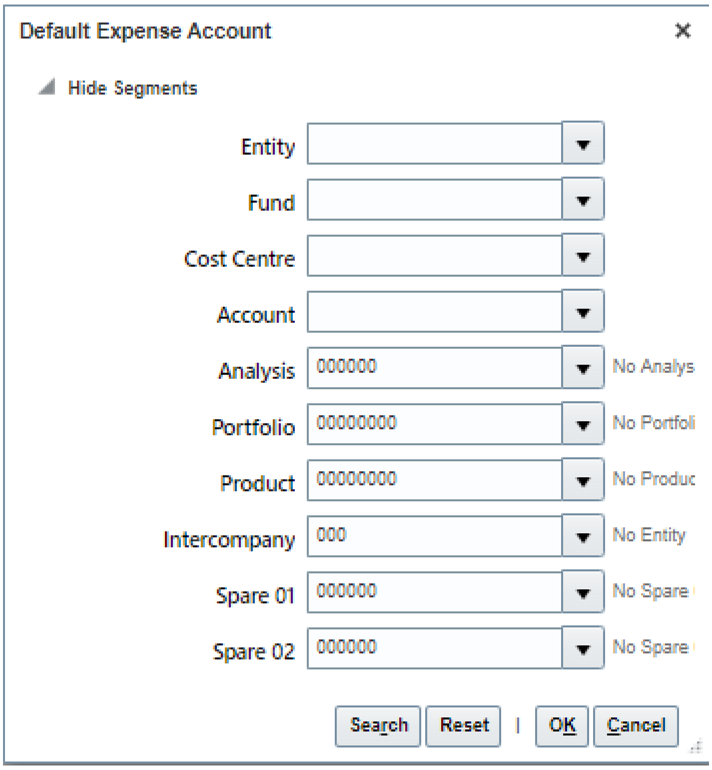
STAFF LEVEL CODE	STAFF LEVEL DESCRIPTION	GRADES ASSIGNED TO STAFF LEVEL CODE	ADDITIONAL CRITERIA
A0	Vice-Chancellor/Principal /Head of Initiation	Principal only	
B0	UCEA level 2	Vice-Principal/University Secretary	
C1	UCEA level 3A	Report to run by HR to identify this grouping	
C2	UCEA level 3B	College Registrar	
D1	UCEA level 3/4A1	Report to run by HR to identify this grouping	
D2	UCEA level 3/4A2	Report to run by HR to identify this grouping	
D3	UCEA level 3/4A3	Report to run by HR to identify this grouping	
E1	UCEA level 4A	XM1	
E2	UCEA level 4B	Report to run by HR to identify this grouping	
F1	UCEA level 5A	AC4, AM4, ACN4, AMN4, ACT4, AMT4 UE10 / OTHS **Academic** staff	
F2	UCEA level 5B	UE10 / OTHS **Non-Academic** staff (e.g. Professional services staff)	
I0	XpertHR level I	UE09, ECA8, AC3A, AC3B, ACN3, ACT3, AM3A, AM3B, AMN3, AMT3, ARW2, XM2A, XM2B	ARC ON SPINAL POINT 39, 40, 40, 44, 45, 46, 54, 58, 62, 66
J0	XpertHR level J	UE08, ECA7, AC2, AM2, ACN2, AMN2, ARW1, MC3, XM3A, XM3B, RCB3	ARC ON SPINAL POINT 37, 38, 49, 50, 60, 61, 65
K0	XpertHR level K	UE07, UE7N, ECA6, MC2, AFC7, ECA6, XM4A, XM4B, RCB4	ARC ON SPINAL POINT 29, 30, 30, 36, 41, 42, 47, 48, 51, 52, 53, 55, 56, 57, 59, 63, 64
L0	XpertHR level L	UE06, UE6N, ECA5, SDS1, MCA, MC1, AFC6, ECA5, XM5A, XM5B, RCB5, K375	
M0	XpertHR level M	UE05, UE04, UE5N, ECA4, AFC5, RCB6, XM6B	
N0	XpertHR level N	UE03, TR01, ECA3, MA1, MA3, RCB7, XM6A	
O0	XpertHR level O	UE02, ECA2, RCB8	
P0	XpertHR level P	UE01, ECA1	

Default Expense Account Code

Select the icon at the right of the field



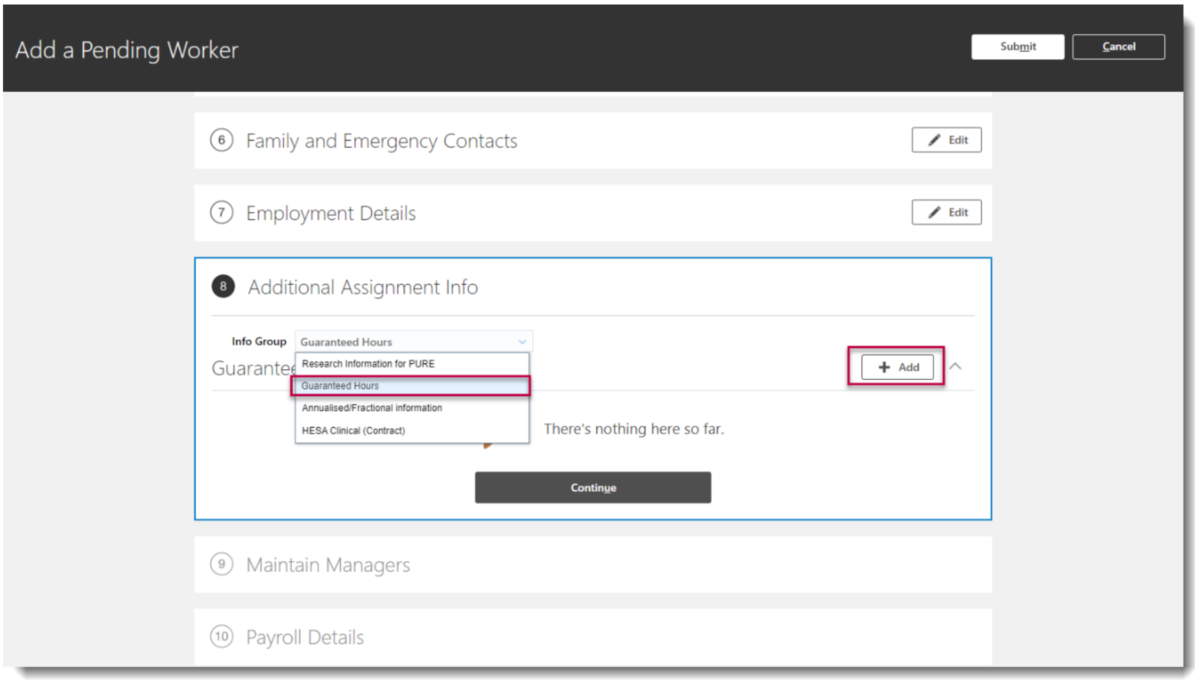
Complete all fields as per the details on the approved Job Requisition Business Case form, or you can search for the appropriate values and select from a list of default options. Then press OK.

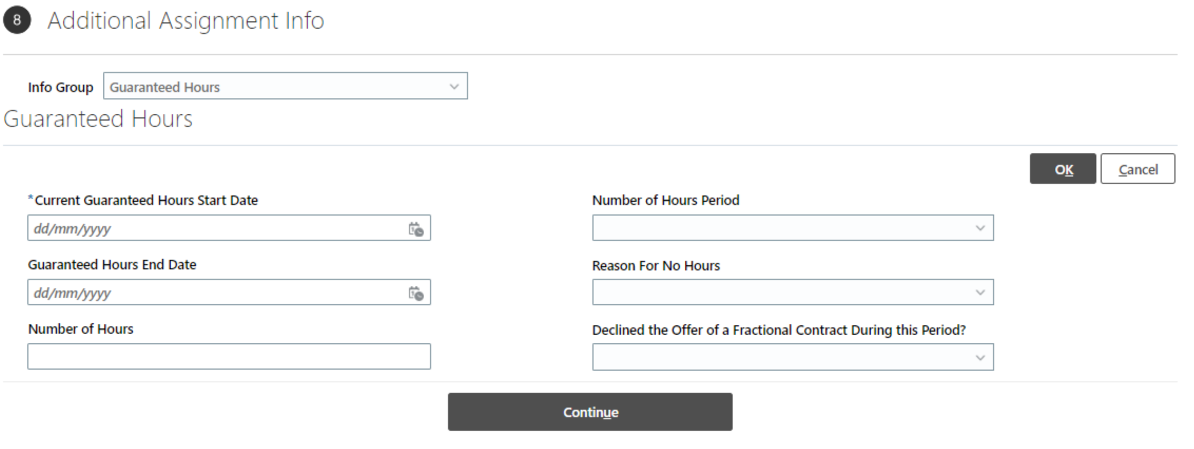


Then, press **Continue**

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

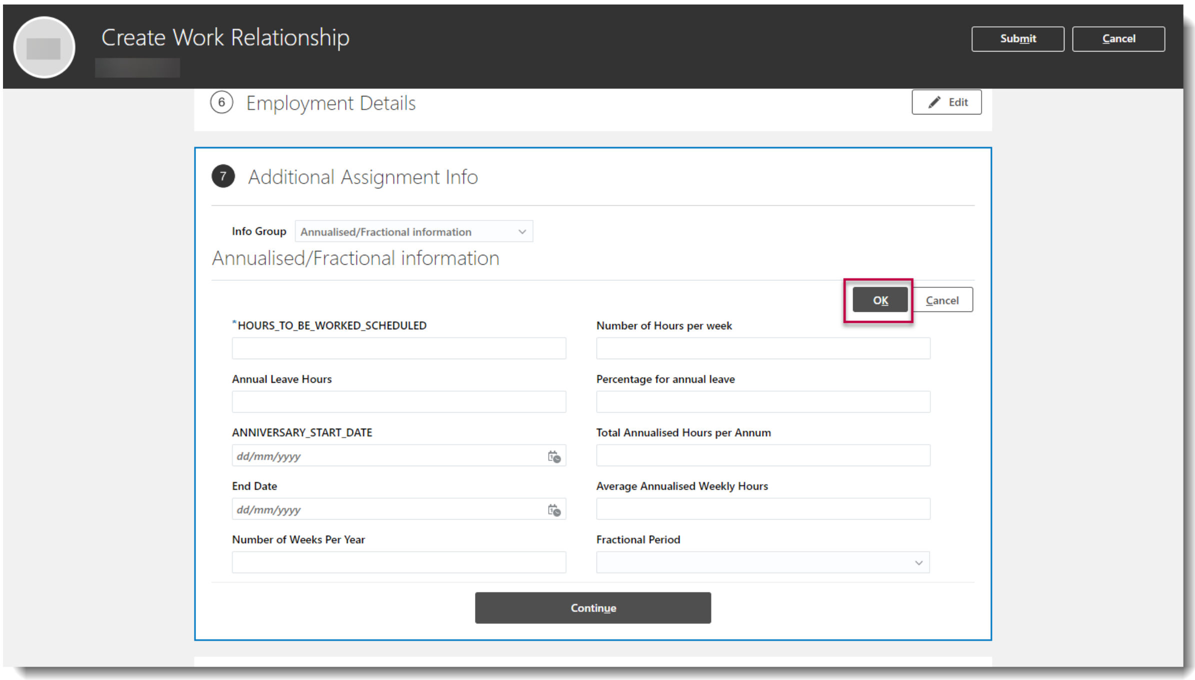
For Guaranteed Hours (please note the information entered here feeds the GH App)



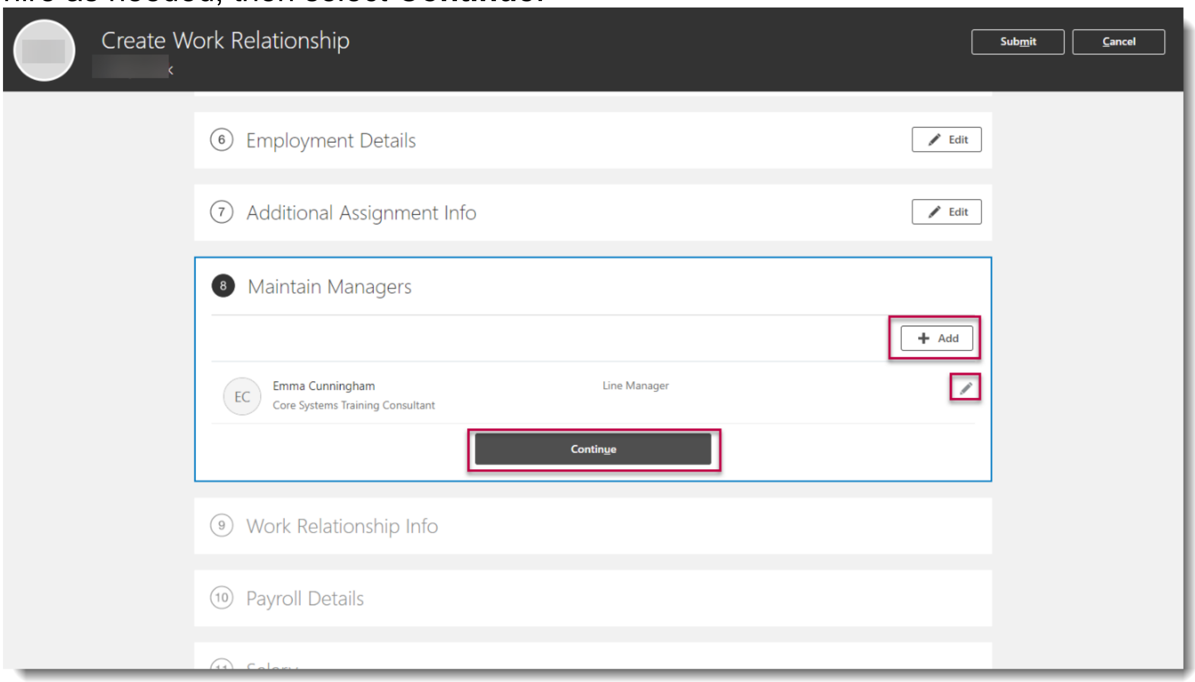


- **Current Guaranteed Hours Start date field** - enter the same as the contract start date
- **Guaranteed Hours End date field** - enter the GH Period end date
- **Number of Hours field** - enter the minimum hours to be guaranteed in the initial GH period.
- **Number of Hours Period field** - select from one of the available drop down options (see Appendix 2 for guidance and description). **Please note you should only select one of the following options:**
    - **Per Year = if the contract is for a year or longer**
    - **Over Period of GHC = if the contract is for less than a year**
- **Reason for No Hours** – do not enter anything here (HR Ops use only)
- **Declined the Offer of a Fractional Contract** – do not enter anything here (HR Ops use only)

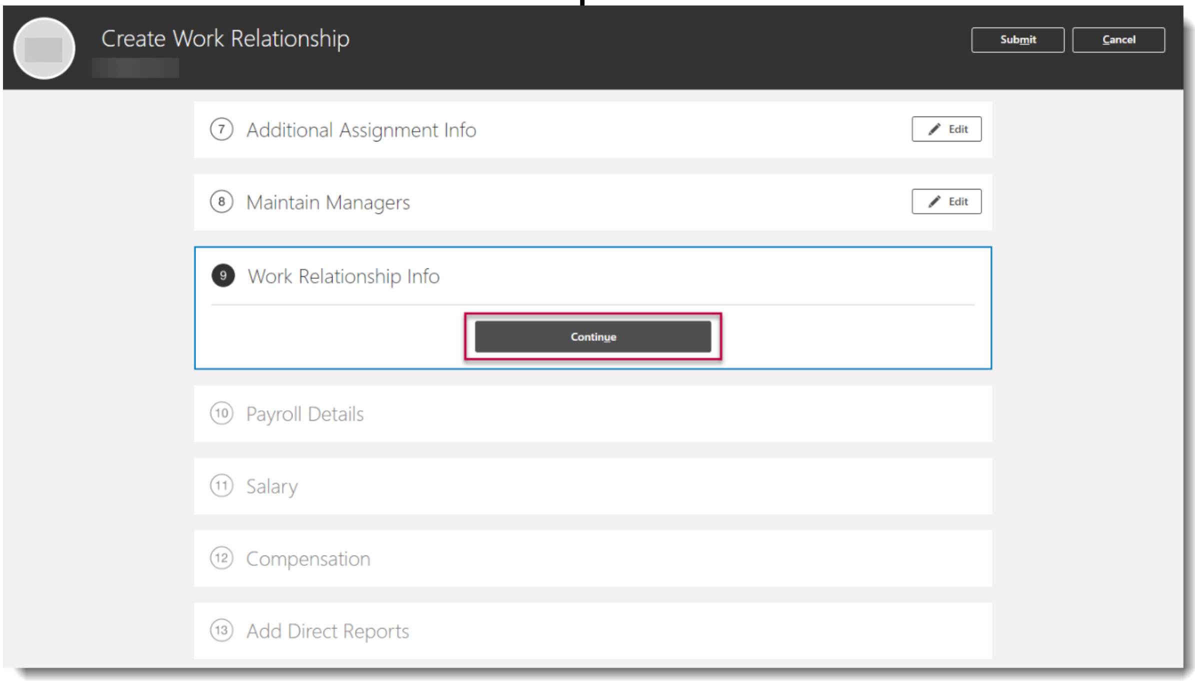
Annualised/Fractional Information



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

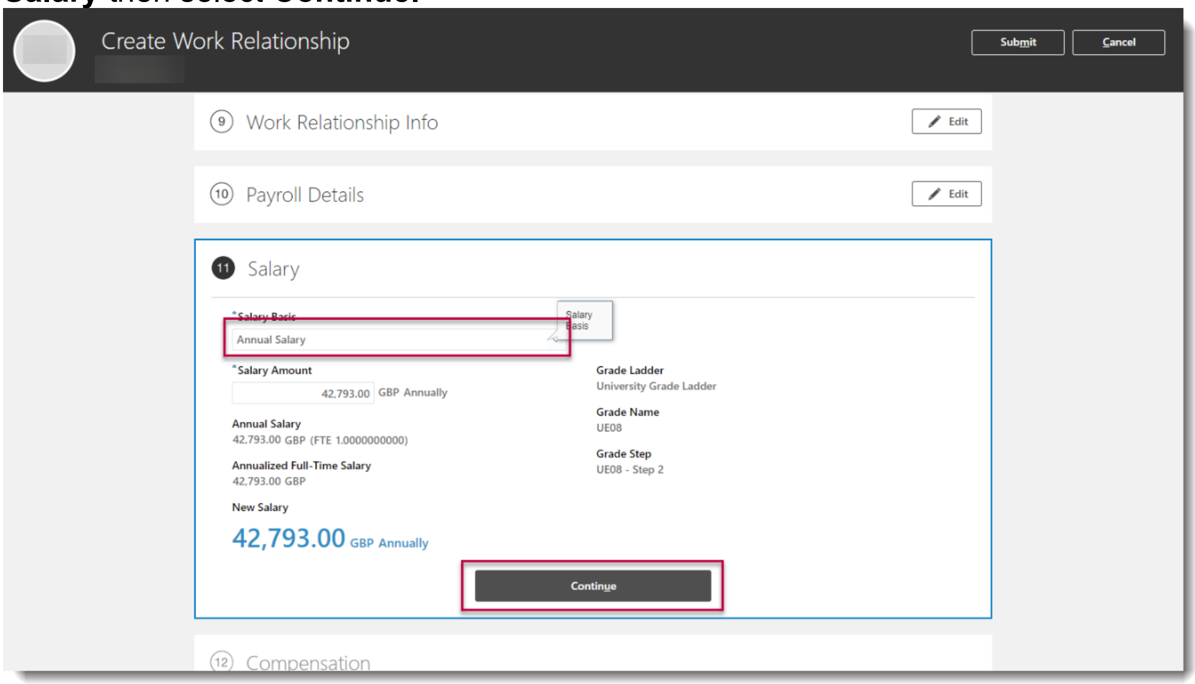


11. Click **Continue** in the **Work Relationship Info** section.



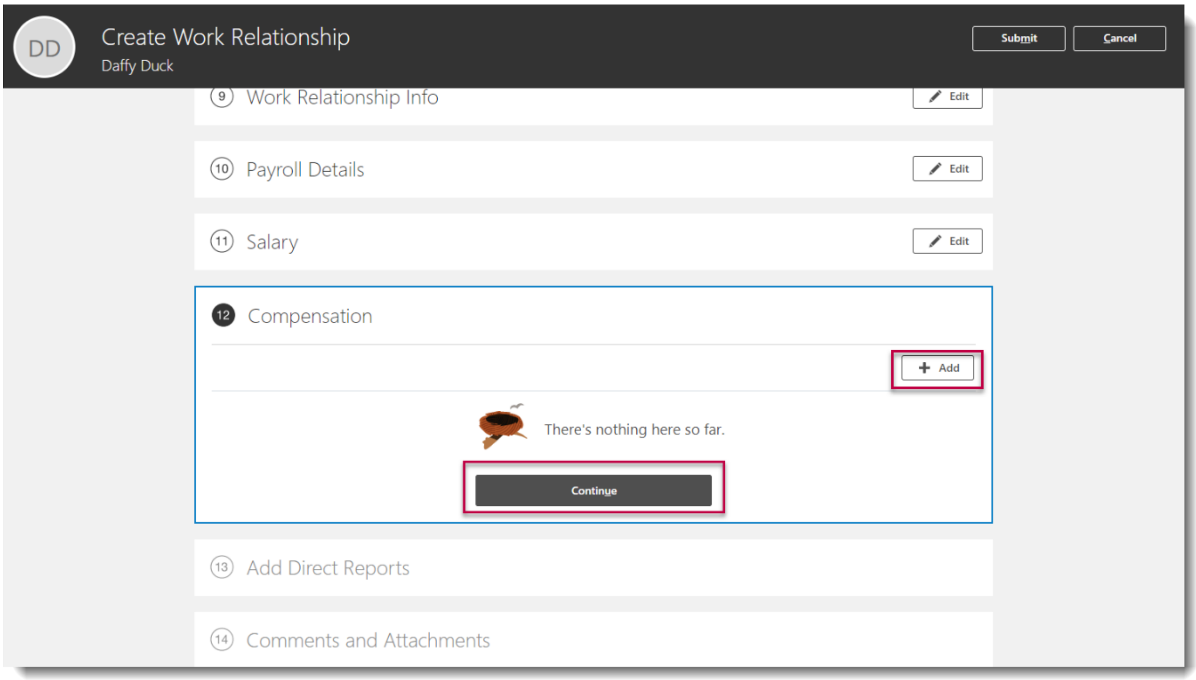
12. In the **Payroll Details** section select UoE Group in the **Payroll Frequency** section then select **University of Edinburgh** as the **Tax Reporting Unit.** Click **Continue.**

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

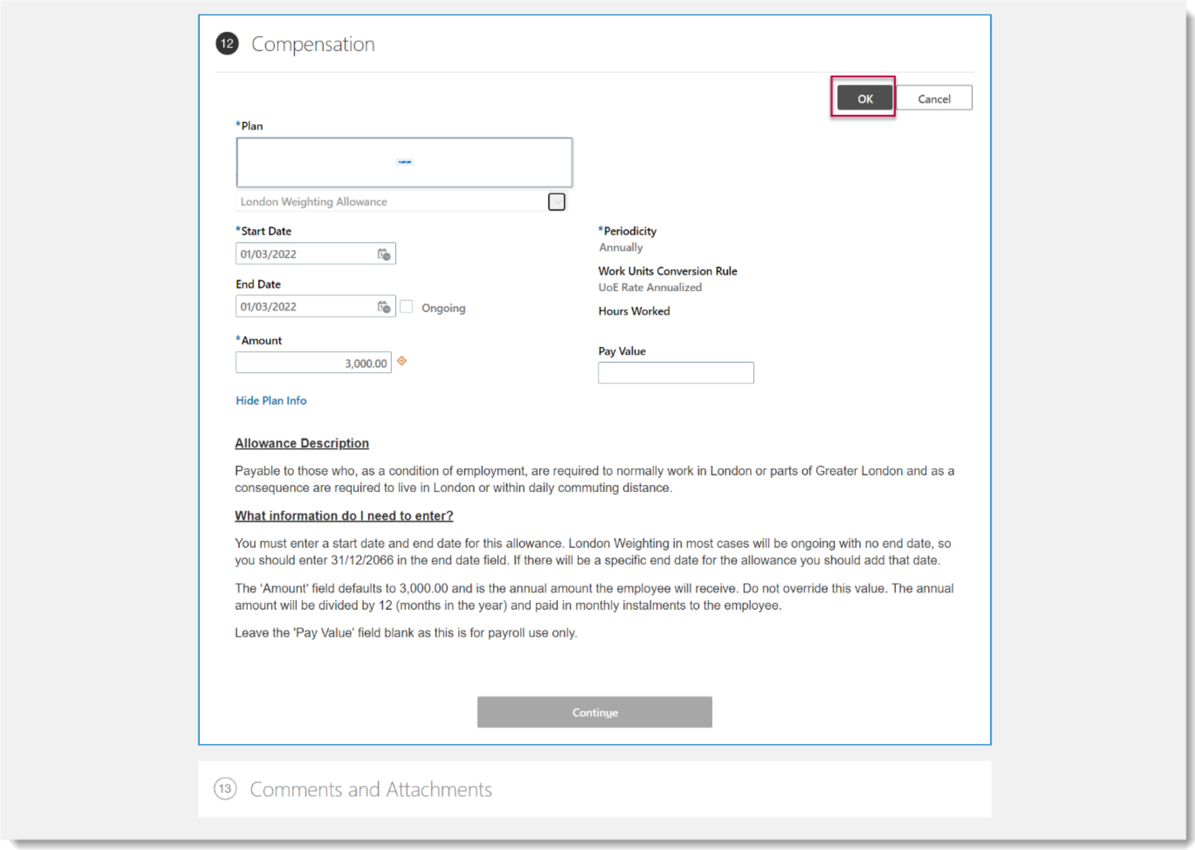


The salary amount should populate for all on-scale salaries. If this is an off-scale salary, populate the **Salary Amount** field as appropriate.

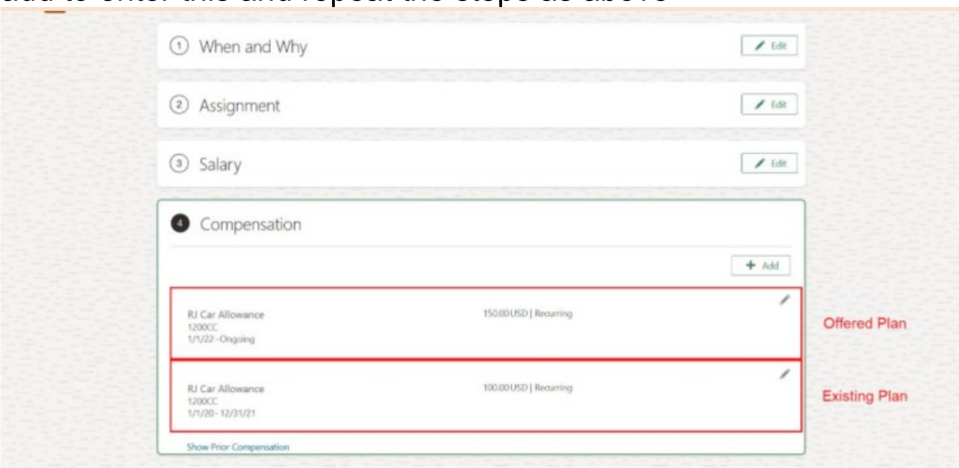
14. Update the **Compensation** section if any additional allowances are to be added. There are 14 allowances (see appendix) that can be selected, if the allowance you require is not listed please include this information in the comments section below. You can bypass this by clicking **Continue** if there is no allowance to add. To add an allowance, select **Add**.



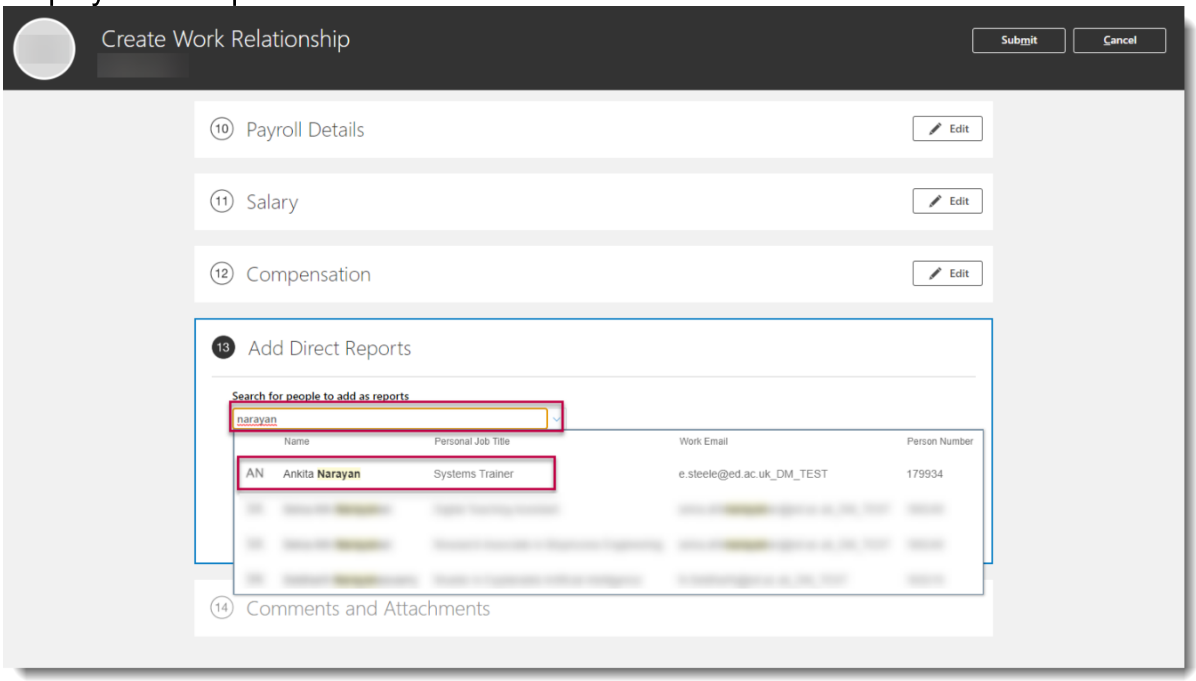
15. **Select the 'Plan'** (Allowance). The example shown is the addition of a London weighting. The screen will vary depending on the allowance selected and the in system eligibility criteria. There will be on screen guidance to help. Select **OK** then **Continue**.



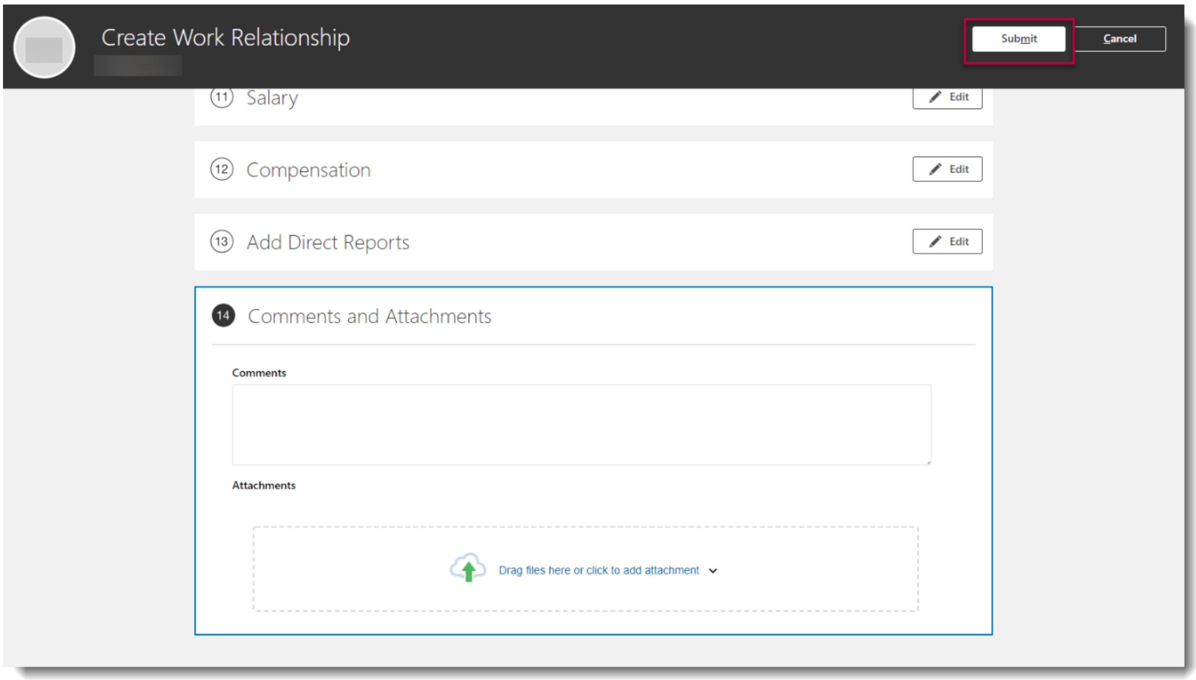
If more than one allowance is required If more than one allowance is required click add to enter this and repeat the steps as above



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



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



Once approved the onboarding Journey ‘Rejoining the University of Edinburgh’ will automatically be assigned.

Appendix

Appendix 1
Allowances configured for compensation section - If the allowance you need is not listed please add this to the comments section and use the attachments for any additional information/rationale.

- Acting Up Allowance
- Contractual Overtime
- Deans Honorarium
- Head of School
- London Weighting Allowance
- On Call Payment
- Overseas Supplement
- Premium Bands
- Responsibility Allowance
- Royal Society Award
- Secondment Allowance
- Wardens Allowance
- Wellcome Trust Allowance
- Wellcome Trust Fellowship

Appendix 2 Description for Guaranteed Hours Period Hours Cover / Number of Hours Period Field
Each should be used in the following scenarios:

Option	Description	When to use
Over Period of Current GHC **Use this for contracts less than a year**	Minimum hours to be guaranteed for full duration of GH contract e.g. over the 2-year fixed term contract	• The GH period start and end date and Fixed Term Contract start and projected end date must the same • You do not need to tick the Annually reviewed box in the Job Offer Additional Information screen • No GH refresh letter is required unless the fixed term contract is subsequently extended. • This option and Over Period of Current FTC are similar. Please check with your HR partner if there is a preferred approach in your School/Department
Over Period of Current FTC	Minimum hours to be guaranteed for full	• The GH period start and end date and Fixed

Not in use	duration of the current fixed term contract.	Term Contract start and projected end date must be the same • You do not need to tick the Annually reviewed box in the job offer Additional Information screen • No GH refresh letter is required unless the fixed term contract was extended. • This option and Over Period of Current GHC are similar. Please check with your HR partner if there is a preferred approach in your School/Department
Per Year **Use this for contracts a year or longer**	The minimum hours to be guaranteed for one GH Period.	• This option is recommended for individuals getting a contract for a number of years. • The GH period is a year from the GH Start date. i.e. if start date is 01/09/2023 the GH end date must be 31/8/2024 • The GH employee will only get access to a timecard to claim payment if they have a current GH period • You **do need** to tick the Annually Reviewed box in the job offer Additional Information screen • You need to send a GH refresh letter at the end of each GH period
Per Year, Every Year for (use with open ended contracts) **Not in use**	The minimum hours to be guaranteed are to be the same minimum hours for each GH Period, indefinitely	• This option is usually used for open-ended assignments. • By selecting this option, from the outset of the contract, you are guaranteeing the employee the same minimum hours each year from the duration

		of the open-ended contract. This may be an issue if the demand for the work or budget available changes over time. • You do not need to tick the Annually reviewed box in the job offer Additional Information screen • There is no need to send a GH refresh letter, but you should monitor the actual number of hours worked versus the minimum guarantee
Per Year/Every Year-Over Dura/FTC **Not in use**	The minimum hours to be guaranteed are to be the same for each GH Period for the full duration of the fixed term employment contract related to that assignment.	• Use this if you have a stable requirement for hours. • By selecting this option, from the outset of the contract, you are guaranteeing the employee the same minimum hours each year from the duration of the fixed term contract. This may be an issue if the demand for the work or budget available changes over time. • You do not need to tick the Annually reviewed box in the job offer Additional Information screen • There is no need to send a GH refresh letter, but you should monitor the actual number of hours worked versus the minimum guarantee. • No refresh letter is required unless the fixed term contract is extended.