



## 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.

## 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**

 Add a Pending Worker

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

Continue

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

Continue

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

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**.

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.

Continue

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**.

Continue

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

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**

Continue

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

Continue

16. Complete the **Compensation** section should any allowances be required and click **Continue**

Continue

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

Submit

## Rehire a previous employee

1. Select the previous worker record and click **Continue**

Continue

2. Click **OK**

OK

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

Continue

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

Continue

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

Continue

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

Continue

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

Continue



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

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**.

Continue

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

Continue

12. Click **Continue**

Continue

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**

Continue

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

Continue

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

Continue

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

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

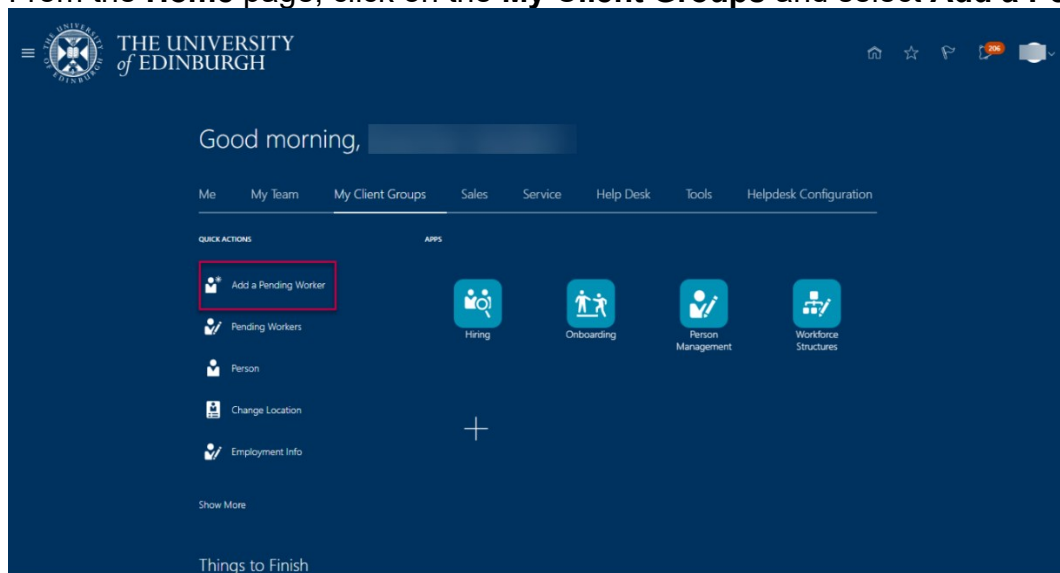
click **Submit**

Submit

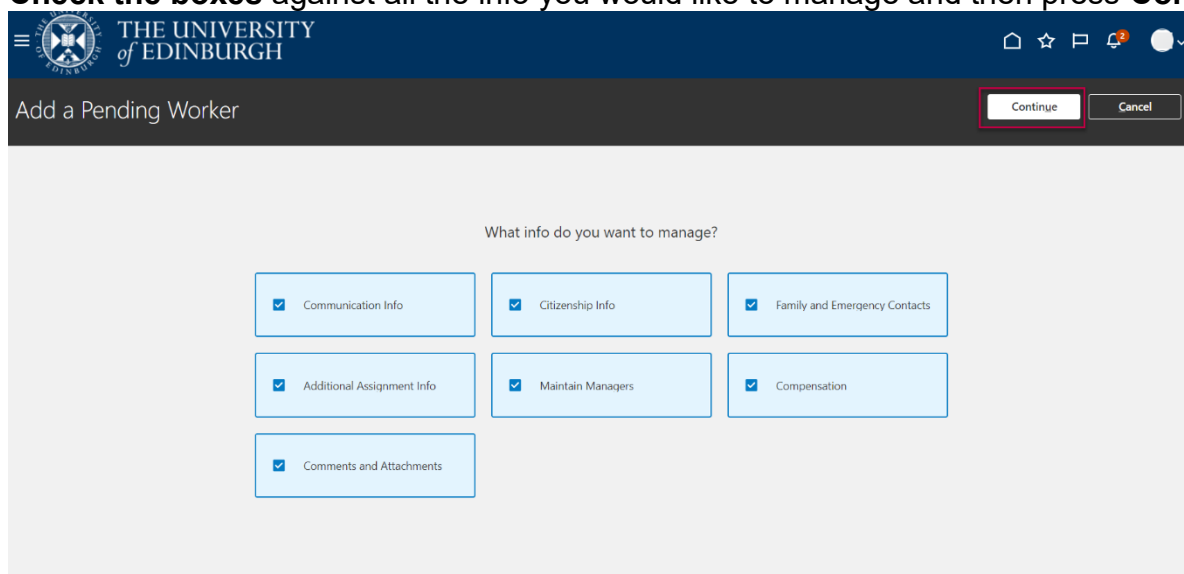
In Detail...

## Add Pending Worker

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

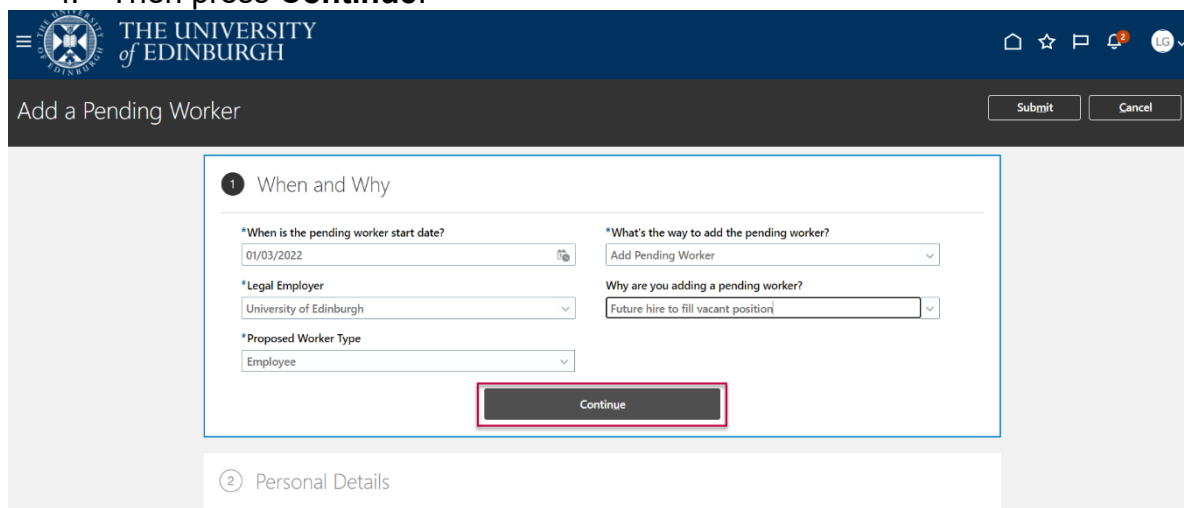


2. **Check the boxes** against all the info you would like to manage and then press **Continue**.



3. In the **When and Why** section,

- Enter the **Pending worker start date**
- Select the relevant **Legal Employer**
- Select the relevant **Proposed Worker Type**
- Make sure the Action** under 'What's the way to add the pending worker' states '**Add Pending Worker**'
- Select the Action Reason '**Future hire to fill vacant position**' in the 'Why are you adding a pending worker' section
- 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

The screenshot shows a web form titled "Add a Pending Worker" with a "Submit" and "Cancel" button in the top right. The main section is "2 Personal Details". It contains the following fields:

- Person Number: Generated automatically
- \*Last Name: Text input field with a calendar icon
- Middle Name: Text input field
- Title: Dropdown menu with "Select a value"
- Preferred Name: Text input field
- \*First Name: Text input field
- Date of Birth: Text input field with format "dd/mm/yyyy" and a calendar icon
- HESA Disability 1: Dropdown menu
- Student Number: Text input field
- HESA disability 2: Dropdown menu
- UOE\_MORAY\_HOUSE\_TERMS: Dropdown menu
- HESA previous institution: Dropdown menu
- STSS/GTC number: Text input field
- REF Unit of Assessment: Dropdown menu
- HESA Staff Identifier: Text input field
- HESA Highest Qualification: Dropdown menu
- UOE\_UUN: Text input field
- HESA previous employment: Dropdown menu

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**.

Add a Pending Worker
Submit
Cancel

Date of Birth  
dd/mm/yyyy
Student Number
UOE\_MORAY\_HOUSE\_TERMS
STSS/GTC number
HESA Staff Identifier
UOE\_UUN

HESA Disability 1
HESA Disability 2
HESA previous institution
REF Unit of Assessment
HESA Highest Qualification
HESA previous employment

National Identifiers
Country  
United Kingdom
National ID Type  
Select a value

+ Add

Continue

3 Communication Info

Add a Pending Worker
Submit
Cancel

STSS/GTC number
HESA Staff Identifier
UOE\_UUN

REF Unit of Assessment
HESA Highest Qualification
HESA previous employment

National Identifiers
+ Add

\*Country  
United Kingdom
Issue Date  
dd/mm/yyyy

\*National ID Type  
National Insurance Number
Expiration Date  
dd/mm/yyyy

\*National ID  
MS763645
Place of Issue

☒ Primary

Continue

3 Communication Info

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:

**Add a Pending Worker** [Save] [Submit] [Cancel]

⚠ If one of these people is the person you're adding, select the person. Else select no match. (PER-1532260)

Potential Matches

☐ No match, add person

☒ Person Name  
James Brown  
Legal Employer  
University of Edinburgh  
Person Type  
Employee Casual  
Business Unit  
University of Edinburgh  
Department  
Academic and Student Administration - CAHSS  
Assignment Number  
E259419  
Start Date  
8/03/2022

**Error**  
The selected person has an active assignment of this type with this legal employer.  
[OK] [Cancel]

Country  
United Kingdom

[Continue]

---

**Add a Pending Worker** [Save] [Submit] [Cancel]

⚠ If one of these people is the person you're adding, select the person. Else select no match. (PER-1532260)

Potential Matches

☐ No match, add person

<input type="radio"/> Person Name James Brown	Personal Job Title Administrator (B1) (PAO - Administration)
Legal Employer University of Edinburgh	Termination Date
Person Type Employee Casual	Date of Birth 1/03/1987
Business Unit University of Edinburgh	Location 1-7 George Square
Department Academic and Student Administration - CAHSS	Work Email gmgayn@yahoo.com
Assignment Number E259419	Country United Kingdom
Start Date 8/03/2022	

[Continue]

### 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 a 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 reenter 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.

Add a Pending Worker Submit Cancel

① When and Why Edit

② Personal Details Edit

③ Communication Info

Phones + Add

Type  
Select a value

Emails + Add

\*Type  
Work Email

\*From Date  
10/11/2020

\*Email

To Date  
dd/mm/yyyy

☒ Primary

Continue

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.

Add a Pending Worker Submit Cancel

① When and Why Edit

② Personal Details Edit

③ Communication Info Edit

④ Addresses

Country  
Select a value

Continue

⑤ Citizenship Info

⑥ Family and Emergency Contacts

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

⑤ Citizenship Info + Add

Nationality  
Select a value

Continue

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

5 Citizenship Info

+ Add

\*Nationality  
United Kingdom

Citizenship Status  
Active

From Date  
dd/mm/yyyy

To Date  
dd/mm/yyyy

Continue

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

Add a Pending Worker

Submit Cancel

3 Communication Info Edit

4 Addresses Edit

5 Citizenship Info Edit

6 Family and Emergency Contacts

Relationship  
Select a value

Contact Type

Continue

7 Employment Details

8 Additional Assignment Info

9 Maintain Managers

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

7
Employment Details

Pending Worker Person Type  
Pending Worker

\*Proposed Person Type  
Employee

\*Business Unit  
Select a value

Primary Assignment  
Yes

Projected End Date  
dd/mm/yyyy

\*Position  
Select a value

\*Personal Job Title

\*Grade Ladder  
Select a value

\*Grade  
Select a value

Step  
Select a value

Department  
Select a value

\*Location  
Select a value

100% Off campus working (Approved flexible working only)  
No

Worker Category  
Select a value

\*Assignment Category  
Select a value

☒ Calculate FTE and headcount automatically

Working Hours  
35 Weekly

Derived Standard Working Hours  
35 Weekly

FTE  
1

Working as a Manager  
No

Fixed Term Reason Code

NHS Honorary Contract

Contract Review Date  
dd/mm/yyyy

\*Research/Teaching&Research/Teaching Only

\*HESA Activity Standard Occupational Classification

\*HESA Level

HESA Reason for End of Contract

Clinical Increment Date  
dd/mm/yyyy

Off-Campus Working Days (Approved Flexible Working only)

\*Default Expense Account

Continue

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 <b>it should be overwritten for a meaningful job title</b> . 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*	<p><b>1 - Academic Contract that is teaching only</b> (applies only to contracts indicating that staff are teaching only. Teaching should include all related activities such as tutoring and preparation).</p> <p><b>2 - Academic Contract that is research only</b> (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)).</p> <p><b>3 - Academic contract that is both teaching and research</b> (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).</p> <p><b>4 - Non academic contract</b></p> <p><b>9 - Academic Contract that is neither teaching nor research</b> (should be used for academic contracts where the primary employment function is not teaching and/or research).</p> <p>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.</p>
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 <a href="#">Staff 2023/24 - Activity Standard Occupational Classification   HESA</a>
HESA Level*	This is now a mandatory field, please use the <a href="#">table below</a> 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).	<p>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).</p> <p><b>Note</b> - 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 <b>150 character limit</b>.</p>

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.
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## 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 <b>Academic</b> staff	
F2	UCEA level 5B	UE10 / OTHS <b>Non-Academic</b> staff (e.g. Professional services staff)	
I0	XperthHR 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	XperthHR 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	XperthHR 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	XperthHR level L	UE06, UE6N, ECA5, SDS1, MCA, MC1, AFC6, ECA5, XM5A, XM5B, RCB5, K375	
M0	XperthHR level M	UE05, UE04, UE5N, ECA4, AFC5, RCB6, XM6B	
N0	XperthHR level N	UE03, TR01, ECA3, MA1, MA3, RCB7, XM6A	
O0	XperthHR level O	UE02, ECA2, RCB8	
P0	XperthHR level P	UE01, ECA1	

## Default Expense Account Code

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

Default Expense Account



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
<b>Cost Centre</b>	<b>From the JRBC Form</b>
Account	2410
Analysis	000000
Portfolio	00000000
Product	00000000
Intercompany	000

Default Expense Account

×

▲ Hide Segments

Entity

▼

Fund

▼

Cost Centre

▼

Account

▼

Analysis

▼

No Analys

Portfolio

▼

No Portfoli

Product

▼

No Produc

Intercompany

▼

No Entity

Spare 01

▼

No Spare I

Spare 02

▼

No Spare I

Search

Reset

|

OK

Cancel

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)**

Add a Pending Worker

Submit Cancel

6 Family and Emergency Contacts Edit

7 Employment Details Edit

8 Additional Assignment Info

Info Group

Guaranteed Hours

Research Information for PURE

Guaranteed Hours

Annualised/Fractional information

HESA Clinical (Contract)

+ Add

There's nothing here so far.

Continue

9 Maintain Managers

10 Payroll Details

8 Additional Assignment Info

Info Group

Guaranteed Hours

Guaranteed Hours

OK Cancel

\* Current Guaranteed Hours Start Date

dd/mm/yyyy

Guaranteed Hours End Date

dd/mm/yyyy

Number of Hours

Number of Hours Period

Reason For No Hours

Declined the Offer of a Fractional Contract During this Period?

Continue

- **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

**Add a Pending Worker** Submit Cancel

**8 Additional Assignment Info**

Info Group: Annualised/Fractional information

Annualised/Fractional information

*HOURS_TO_BE_WORKED_SCHEDULED	Number of Hours per week
Annual Leave Hours	Percentage for annual leave
ANNIVERSARY_START_DATE dd/mm/yyyy	Total Annualised Hours per Annum
End Date dd/mm/yyyy	Average Annualised Weekly Hours
Number of Weeks Per Year	Fractional Period

OK Cancel

Continue

**9 Maintain Managers**

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

**Add a Pending Worker** Submit Cancel

7 Employment Details Edit

8 Additional Assignment Info Edit

9 **Maintain Managers** Edit

+ Add

GS Gretchen Sanders Line Manager  
Business School Administrator Edit

Continue

10 Payroll Details

11 Salary

12 Compensation

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**.

**Add a Pending Worker** Save Submit Cancel

7 Employment Details Edit

8 Additional Assignment Info Edit

9 Maintain Managers Edit

10 **Payroll Details**

Payroll Frequency

\*Payroll  
UoE Group

Other Info

\*Tax Reporting Unit  
University of Edinburgh

Continue

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

**Add a Pending Worker** [Submit] [Cancel]

9 Maintain Managers [Edit]

10 Payroll Details [Edit]

**11 Salary**

\*Salary Basis  
Annual Salary

Total Amount  
33,797.00

\*Salary Amount  
33,797.00 GBP Annually

Annual Salary  
33,797.00 GBP (FTE 1)

New Salary  
**33,797.00** GBP Annually

Grade Ladder  
University Grade Ladder

Grade Name  
UE07

Grade Step  
UE07 - Step 1

[Continue]

12 Compensation

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).

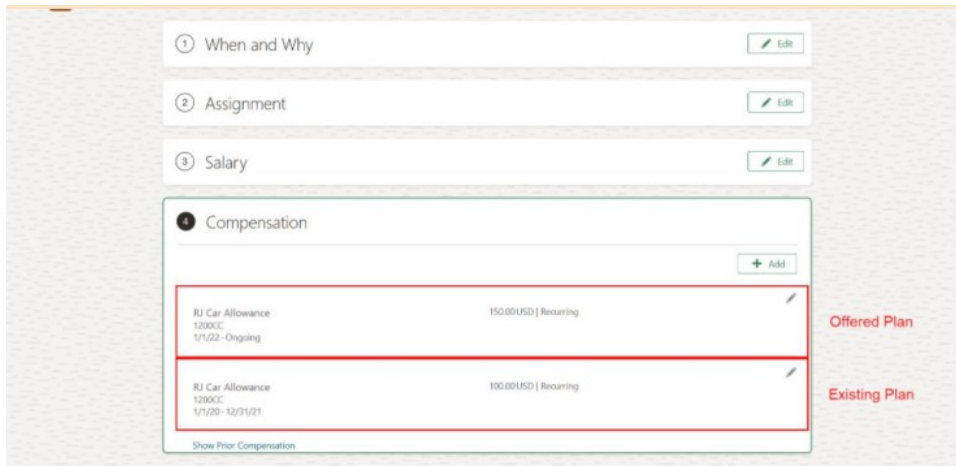
The screenshot shows the 'Add a Pending Worker' form with steps 9 to 13. Step 12, 'Compensation', is highlighted with a red box around the '+ Add' button and the 'Continue' button. The form includes sections for 'Maintain Managers', 'Payroll Details', 'Salary', 'Compensation', and 'Comments and Attachments'. The 'Compensation' section shows a message 'There's nothing here so far.' and a 'Continue' button.

**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**.

The screenshot shows the 'Compensation' form with the 'Plan' selection screen. The 'OK' button is highlighted with a red box, and the 'Continue' button is highlighted with a red box at the bottom. The form includes fields for 'Plan', 'Option', 'Start Date', 'End Date', 'Amount', 'Periodicity', 'Work Units Conversion Rule', 'Hours Worked', and 'Pay Value'. The 'Plan' field is set to 'London Weighting Allowance'. The 'Amount' field is set to '3,000.00'. The 'Continue' button is highlighted with a red box.

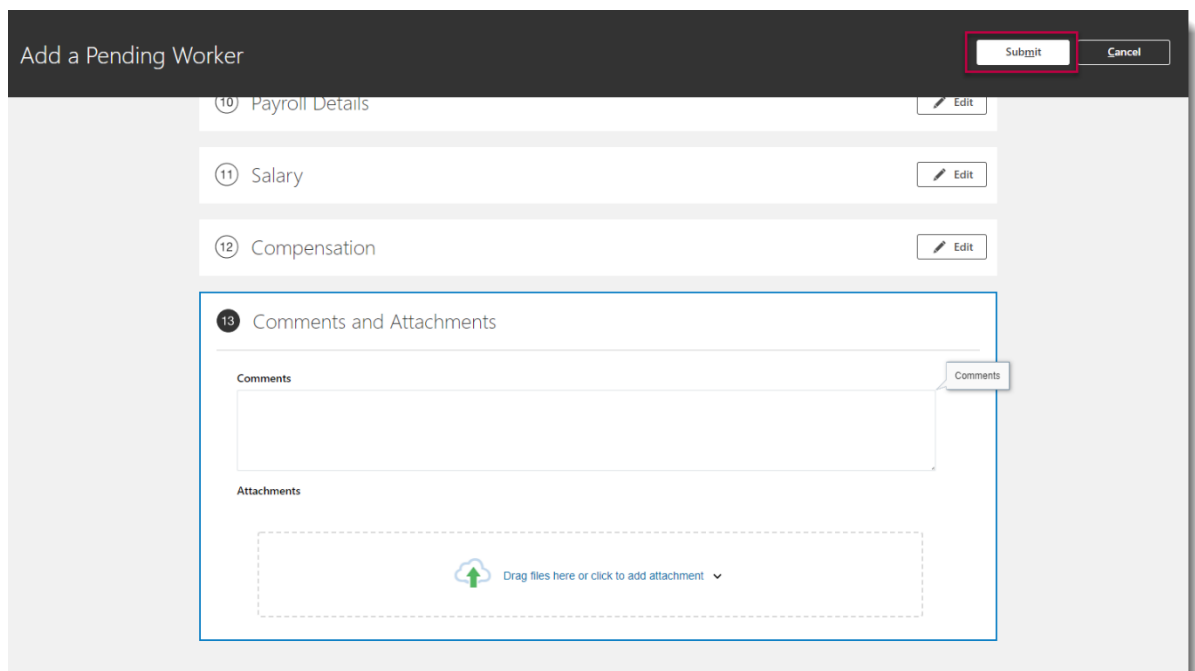
16. Add any comments and upload the completed Job Requisition Business Case form and New Appointee Information Form to the **Comments and Attachments** section then click **Submit**. Please also use this section to list any allowances not able to select in step 15, and use this to provide any supporting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

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



The screenshot shows a form with four steps: 1. When and Why, 2. Assignment, 3. Salary, and 4. Compensation. The Compensation section is active and contains two rows of allowances. The first row is labeled 'Offered Plan' and the second row is labeled 'Existing Plan'. Both rows show 'RJ Car Allowance' with a value of '120000' and a frequency of 'Recurring'. The first row also shows '1/1/22 - Ongoing' and the second row shows '1/1/20 - 12/31/21'. There is a '+ Add' button and a 'Show Prior Compensation' link.

Plan Type	Allowance	Value	Frequency	Period
Offered Plan	RJ Car Allowance	120000	Recurring	1/1/22 - Ongoing
Existing Plan	RJ Car Allowance	120000	Recurring	1/1/20 - 12/31/21



The screenshot shows the 'Add a Pending Worker' form, step 13: Comments and Attachments. The form has a dark header with 'Add a Pending Worker' and 'Submit' and 'Cancel' buttons. The main content area has a list of steps: 10. Payroll Details, 11. Salary, 12. Compensation, and 13. Comments and Attachments. The 13th step is active and contains a 'Comments' section with a text area and an 'Attachments' section with a dashed box and a 'Drag files here or click to add attachment' button. There is also a 'Show Prior Compensation' link.

10 Payroll Details

11 Salary

12 Compensation

13 Comments and Attachments

Comments

Attachments

Drag files here or click to add attachment

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**.

The screenshot shows the 'Add a Pending Worker' form. At the top, there's a header bar with 'Add a Pending Worker' and 'Submit' and 'Cancel' buttons. Below the header, there's a text input field containing 'M5763645'. A checkbox labeled 'Primary' is checked. A yellow warning box states: 'If one of these people is the person you're adding, select the person. Else select no match. (PER-1532260)'. Under 'Potential Matches', there's a radio button for 'No match, add person'. Below that, there's a table with two columns: 'Person Name' and 'Personal Job Title'. The 'Person Name' column has a red box around a selection icon. The 'Personal Job Title' column shows 'Tutor (CT) (ACAD - Teacher)'. A 'Continue' button is highlighted with a red box. At the bottom, there are three sections: '3 Communication Info', '4 Addresses', and '5 Citizenship Info'.

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**.

The screenshot shows the 'What info do you want to manage?' form. At the top, there's a header bar with 'Continue' and 'Cancel' buttons. Below the header, there's a question: 'What info do you want to manage?'. There are seven checkboxes, each with a label: 'Communication Info', 'Citizenship Info', 'Family and Emergency Contacts', 'Additional Assignment Info', 'Maintain Managers', 'Compensation', and 'Comments and Attachments'. All checkboxes are checked.

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

The screenshot shows the 'Create Work Relationship' form for the University of Edinburgh. The form is titled 'Create Work Relationship' and has 'Submit' and 'Cancel' buttons. The first step, '1 When and Why', is highlighted with a blue border. It contains the following fields:

- When is the work relationship start date?** 12/11/2020
- Legal Employer** University of Edinburgh
- Why are you adding a work relationship?** Future hire to fill vacant position (dropdown menu)
- Proposed Worker Type** Employee
- \*What's the way to create the work relationship?** Add Pending Worker (dropdown menu)

A red box highlights the 'Continue' button. Red callout letters 'a' and 'b' point to the dropdown menus for 'What's the way to create the work relationship?' and 'Why are you adding a work relationship?' respectively. Below the first step are three other steps: '2 Personal Details', '3 Communication Info', and '4 Addresses'.

- 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**.

The screenshot shows the 'Create Work Relationship' form for the University of Edinburgh, Step 2: Personal Details. The form is titled 'Create Work Relationship' and has 'Submit' and 'Cancel' buttons. The second step, '2 Personal Details', is highlighted with a blue border. It contains the following fields:

- Name**
  - Last Name** Duck
  - First Name** Daffy
- Title** Mr.
- Biographical Info**

A red box highlights the 'Continue' button. Red callout letters 'a' and 'b' point to the 'Last Name' and 'First Name' fields respectively. Below the second step are three other steps: '3 Communication Info', '4 Addresses', and '5 Addresses'.

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**.

The screenshot shows the 'Create Work Relationship' form for 'Daffy Duck'. The current step is '3 Communication Info'. The form has a sidebar with steps 1 'When and Why', 2 'Personal Details', and 3 'Communication Info'. The main content area has sections for 'Phones' and 'Emails'. The 'Phones' section has a '+ Add' button. The 'Emails' section has a 'Home Email' field with an edit icon, a 'Work Email' field with a radio button and an edit icon, and a 'Continue' button at the bottom. A red box highlights the '+ Add' button in the 'Phones' section.

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

The screenshot shows the 'Create Work Relationship' form for 'Daffy Duck'. The current step is '4 Addresses'. The form has a sidebar with steps 1 'When and Why', 2 'Personal Details', 3 'Communication Info', and 4 'Addresses'. The main content area has an 'Addresses' section with a '+ Add' button and a 'Continue' button at the bottom. A red box highlights the '+ Add' button. The 'Addresses' section also shows a 'Home Address' with a radio button and an edit icon. The address details are: Argyle House, 3 Lady Lawson Street, EDINBURGH, EH3 9DR, UNITED KINGDOM.



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

The screenshot shows a web form titled "Create Work Relationship". At the top right are "Submit" and "Cancel" buttons. The form is divided into several sections, each with a numbered icon and an "Edit" button: "3 Communication Info", "4 Addresses", "5 Citizenship Info", "6 Employment Details", and "7 Additional Assignment Info". The "5 Citizenship Info" section is highlighted with a blue border. Inside this section, there is a "+ Add" button and a table with the following data:

<b>Nationality</b> United Kingdom	<b>From Date</b> 1/10/2020
<b>Citizenship Status</b> Active	<b>To Date</b> 20/02/2024

Below the table is a "Continue" button. Red boxes highlight the "+ Add" button, the "Continue" button, and the "To Date" field.

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

6
Employment Details

Pending Worker Person Type

Pending Worker

\*Proposed Person Type

Employee

\*Business Unit

Select a value

Primary Assignment

Yes

Projected End Date

dd/mm/yyyy

\*Position

Select a value

\*Personal Job Title

\*Grade Ladder

Select a value

\*Grade

Select a value

Step

Select a value

Department

Select a value

\*Location

Select a value

100% Off campus working

No

Worker Category

Select a value

\*Assignment Category

Select a value

☒ Calculate FTE and headcount automatically

Working Hours

35 Weekly

Derived Standard Working Hours

35 Weekly

FTE

1

Working as a Manager

No

Fixed Term Reason Code

NHS Honorary Contract

Contract Review Date

dd/mm/yyyy

\*Research/Teaching&Research/Teaching Only

\*HESA Activity Standard Occupational Classification

\*HESA Level

HESA Reason for End of Contract

Clinical Increment Date

dd/mm/yyyy

\*Default Expense Account

Continue

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 <a href="#">here</a> .
Level*	This is now a mandatory field, please use the <a href="#">table below</a> 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).  <b>Note</b> - 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 <b>150 character limit</b>
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.
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## 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 <b>Academic</b> staff	
F2	UCEA level 5B	UE10 / OTHS <b>Non-Academic</b> staff (e.g. Professional services staff)	
I0	XperthHR 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	XperthHR 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	XperthHR 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	XperthHR level L	UE06, UE6N, ECA5, SDS1, MCA, MC1, AFC6, ECA5, XM5A, XM5B, RCB5, K375	
M0	XperthHR level M	UE05, UE04, UE5N, ECA4, AFC5, RCB6, XM6B	
N0	XperthHR level N	UE03, TR01, ECA3, MA1, MA3, RCB7, XM6A	
O0	XperthHR level O	UE02, ECA2, RCB8	
P0	XperthHR level P	UE01, ECA1	

## Default Expense Account Code

Select the icon at the right of the field

Default Expense Account



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.

Default Expense Account

×

▲ Hide Segments

Entity

▼

Fund

▼

Cost Centre

▼

Account

▼

Analysis

000000

▼

No Analys

Portfolio

00000000

▼

No Portfoli

Product

00000000

▼

No Produc

Intercompany

000

▼

No Entity

Spare 01

000000

▼

No Spare

Spare 02

000000

▼

No Spare

Search

Reset

|

OK

Cancel

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)**

Add a Pending Worker Submit Cancel

⑥ Family and Emergency Contacts Edit

⑦ Employment Details Edit

⑧ Additional Assignment Info

Info Group Guaranteed Hours

Guaranteed Hours

Research Information for PURE

Guaranteed Hours

Annualised/Fractional information

HESA Clinical (Contract)

+ Add

There's nothing here so far.

Continue

⑨ Maintain Managers

⑩ Payroll Details

## ⑧ Additional Assignment Info

Info Group Guaranteed Hours

Guaranteed Hours

OK Cancel

\* Current Guaranteed Hours Start Date dd/mm/yyyy

Guaranteed Hours End Date dd/mm/yyyy

Number of Hours

Number of Hours Period

Reason For No Hours

Declined the Offer of a Fractional Contract During this Period?

Continue

- **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

The screenshot shows the 'Additional Assignment Info' form within the 'Create Work Relationship' application. The form is titled '7 Additional Assignment Info' and includes a dropdown menu for 'Info Group' set to 'Annualised/Fractional information'. Below this, the text 'Annualised/Fractional information' is displayed. The form contains several input fields: 'HOURS\_TO\_BE\_WORKED\_SCHEDULED', 'Number of Hours per week', 'Annual Leave Hours', 'Percentage for annual leave', 'ANNIVERSARY\_START\_DATE' (with a date picker), 'End Date' (with a date picker), 'Total Annualised Hours per Annum', 'Average Annualised Weekly Hours', 'Number of Weeks Per Year', and 'Fractional Period' (with a dropdown). A red box highlights the 'OK' button, and another red box highlights the 'Continue' button at the bottom of the form.

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

The screenshot shows the 'Maintain Managers' section within the 'Create Work Relationship' application. The section is titled '8 Maintain Managers' and includes a '+ Add' button and an 'Edit' button. Below these buttons, a manager is listed: 'Emma Cunningham' (with initials 'EC') and 'Core Systems Training Consultant'. The title 'Line Manager' is also present. A red box highlights the '+ Add' button, and another red box highlights the 'Continue' button at the bottom of the section. Below the 'Maintain Managers' section, there are links for '9 Work Relationship Info' and '10 Payroll Details'.

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

The screenshot shows the 'Create Work Relationship' form with a dark header bar containing a profile icon, the title 'Create Work Relationship', and 'Submit' and 'Cancel' buttons. The form is divided into several sections, each with a numbered icon and an 'Edit' button. The sections are: 7 Additional Assignment Info, 8 Maintain Managers, 9 Work Relationship Info, 10 Payroll Details, 11 Salary, 12 Compensation, and 13 Add Direct Reports. The 'Work Relationship Info' section (9) is highlighted with a red box, and a 'Continue' button is visible within this 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 screenshot shows the 'Create Work Relationship' form with the 'Salary' section (11) highlighted by a red box. The 'Salary Basis' dropdown menu is open, showing 'Annual Salary' as the selected option. The form displays the following salary information: 'Salary Amount' of 42,793.00 GBP Annually, 'Annual Salary' of 42,793.00 GBP (FTE 1.000000000000), 'Annualized Full-Time Salary' of 42,793.00 GBP, and 'New Salary' of 42,793.00 GBP Annually. The 'Grade Ladder' is 'University Grade Ladder', the 'Grade Name' is 'UE08', and the 'Grade Step' is 'UE08 - Step 2'. A 'Continue' button is visible at the bottom of the 'Salary' section.



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**.

The screenshot shows a web form titled 'Create Work Relationship' for a user named 'Daffy Duck'. The form has a dark header with a 'DD' logo and buttons for 'Submit' and 'Cancel'. The main content area lists several sections, each with an 'Edit' button: '9 Work Relationship Info', '10 Payroll Details', '11 Salary', '12 Compensation', '13 Add Direct Reports', and '14 Comments and Attachments'. The '12 Compensation' section is highlighted with a blue border. Inside this section, there is a text input field, an 'Add' button with a plus icon, a message 'There's nothing here so far.' accompanied by a small icon of a bowl, and a 'Continue' button. The 'Add' and 'Continue' buttons are highlighted with red boxes.

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**.

12 Compensation

OK

Cancel

\*Plan

London Weighting Allowance

☐

\*Start Date

01/03/2022

\*Periodicity

Annually

End Date

01/03/2022

☐ Ongoing

Work Units Conversion Rule

UoE Rate Annualized

\*Amount

3,000.00

Hours Worked

Pay Value

Hide Plan Info

Allowance Description

Payable to those who, as a condition of employment, are required to normally work in London or parts of Greater London and as a consequence are required to live in London or within daily commuting distance.

**What information do I need to enter?**

You must enter a start date and end date for this allowance. London Weighting in most cases will be ongoing with no end date, so you should enter 31/12/2066 in the end date field. If there will be a specific end date for the allowance you should add that date.

The 'Amount' field defaults to 3,000.00 and is the annual amount the employee will receive. Do not override this value. The annual amount will be divided by 12 (months in the year) and paid in monthly instalments to the employee.

Leave the 'Pay Value' field blank as this is for payroll use only.

Continue

13 Comments and Attachments

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

1 When and Why

2 Assignment

3 Salary

4 Compensation

+ Add

RJ Car Allowance

120000

1/1/22 - Ongoing

150.00 USD | Recurring

RJ Car Allowance

120000

1/1/20 - 12/31/21

100.00 USD | Recurring

Show Prior Compensation

Offered Plan

Existing Plan

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

The screenshot shows the 'Create Work Relationship' form at step 13, 'Add Direct Reports'. The form has a dark header with a profile icon, the title 'Create Work Relationship', and 'Submit' and 'Cancel' buttons. Below the header is a list of steps: 10 Payroll Details, 11 Salary, 12 Compensation, 13 Add Direct Reports (selected), and 14 Comments and Attachments. Each step has an 'Edit' button. The 'Add Direct Reports' section contains a search bar with the text 'Search for people to add as reports' and a dropdown menu showing 'narayan'. Below the search bar is a table with columns: Name, Personal Job Title, Work Email, and Person Number. The table lists several employees, with 'AN Ankita Narayan Systems Trainer e.steele@ed.ac.uk\_DM\_TEST 179934' highlighted. The 'Comments and Attachments' section is visible at the bottom of the form.

Name	Personal Job Title	Work Email	Person Number
AN	Ankita Narayan	Systems Trainer	e.steele@ed.ac.uk_DM_TEST 179934
...	...	...	...
...	...	...	...
...	...	...	...

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**.

The screenshot shows the 'Create Work Relationship' form at step 14, 'Comments and Attachments'. The form has a dark header with a profile icon, the title 'Create Work Relationship', and 'Submit' and 'Cancel' buttons. Below the header is a list of steps: 11 Salary, 12 Compensation, 13 Add Direct Reports, and 14 Comments and Attachments (selected). Each step has an 'Edit' button. The 'Comments and Attachments' section contains a 'Comments' text area and an 'Attachments' section with a dashed box and a green upload icon. Below the dashed box is the text 'Drag files here or click to add attachment'.

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

## 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  <b>Use this for contracts less than a year</b>	Minimum hours to be guaranteed for full duration of GH contract e.g. over the 2-year fixed term contract	<ul style="list-style-type: none"> <li>• The GH period start and end date and Fixed Term Contract start and projected end date must be the same</li> <li>• You do not need to tick the Annually reviewed box in the Job Offer Additional Information screen</li> <li>• No GH refresh letter is required unless the fixed term contract is subsequently extended.</li> <li>• 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</li> </ul>
Over Period of Current FTC	Minimum hours to be guaranteed for full	<ul style="list-style-type: none"> <li>• The GH period start and end date and Fixed</li> </ul>

<b>Not in use</b>	duration of the current fixed term contract.	<p>Term Contract start and projected end date must be the same</p> <ul style="list-style-type: none"> <li>You do not need to tick the Annually reviewed box in the job offer Additional Information screen</li> <li>No GH refresh letter is required unless the fixed term contract was extended.</li> <li>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</li> </ul>
<p>Per Year</p> <p><b>Use this for contracts a year or longer</b></p>	The minimum hours to be guaranteed for one GH Period.	<ul style="list-style-type: none"> <li>This option is recommended for individuals getting a contract for a number of years.</li> <li>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</li> <li>The GH employee will only get access to a timecard to claim payment if they have a current GH period</li> <li>You <b>do need</b> to tick the Annually Reviewed box in the job offer Additional Information screen</li> <li>You need to send a GH refresh letter at the end of each GH period</li> </ul>
<p>Per Year, Every Year for (use with open ended contracts)</p> <p><b>Not in use</b></p>	The minimum hours to be guaranteed are to be the same minimum hours for each GH Period, indefinitely	<ul style="list-style-type: none"> <li>This option is usually used for open-ended assignments.</li> <li>By selecting this option, from the outset of the contract, you are guaranteeing the employee the same minimum hours each year from the duration</li> </ul>

		<p>of the open-ended contract. This may be an issue if the demand for the work or budget available changes over time.</p> <ul style="list-style-type: none"> <li>• You do not need to tick the Annually reviewed box in the job offer Additional Information screen</li> <li>• There is no need to send a GH refresh letter, but you should monitor the actual number of hours worked versus the minimum guarantee</li> </ul>
<p>Per Year/Every Year-Over Dura/FTC</p> <p><b>Not in use</b></p>	<p>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.</p>	<ul style="list-style-type: none"> <li>• Use this if you have a stable requirement for hours.</li> <li>• 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.</li> <li>• You do not need to tick the Annually reviewed box in the job offer Additional Information screen</li> <li>• There is no need to send a GH refresh letter, but you should monitor the actual number of hours worked versus the minimum guarantee.</li> <li>• No refresh letter is required unless the fixed term contract is extended.</li> </ul>