



THE UNIVERSITY *of* EDINBURGH

Guide to Payroll for Employees, Line Managers, SDAs and HR Operations

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Introduction

This guidance document has been written to support employees, Line Managers and School/Department administrators with the Payroll end-to-end business process and details the main business scenarios within the University of Edinburgh. Payroll processes are those that relate to the payment of permanent, fixed term appointments including guaranteed hours, tutors and demonstrators, annualised and fractional contracts as well as casual workers, external examiners, taxable scholarships, overtime, additional payments, allowances.

The guidance has been written by stage in the process and with the key roles involved in the process in mind. The responsibilities of the Payroll Team, Pensions, HR Operations, Finance Systems, and Employees are outlined. Responsibilities of the Line Manager/ Hiring manager and School or Department Administrator may vary in this process between Colleges, Schools and Professional Service Group Departments. Employees should contact their local contacts to understand the process and responsibilities within the areas they support.

Glossary

Additional Post	The process of adding another assignment to an employee who is working across more than one assignment.
Assignment	The assignment of a person to a specific position or the record of the incumbent in a specific position in People and Money.
BACS	Bankers Automated Clearing Services (BACS) is the electronic system used to make Payroll payments to staff (salaries) and third parties. This is used to ensure any new bank sort code / branch is BACS compliant prior to adding it to the system.
Calculation cards	Calculation cards hold the data that is fed through to element entries and then processed in the payroll run
Document Record	The part of an employee's employment record on People and Money, which holds electronic copies of certain documents.
Fixed Term Reason Codes	A list of acceptable reasons for the use of fixed-term contracts.
General Ledger	Accounting Application containing all the ledger transactions for the University.
Half pay	As a result of a payroll impacting absence and in line with their Conditions of Service , an employee may receive half pay instead of full pay.
Hourly rate	Hourly rate is calculated on FTE pay / 52.143 / weekly contracted hours.

Inactive employee	An ex-employee who is no longer paid by the University.
Internal Transfer	The process of moving an employee from one assignment to another.
Job	A generic job title that is re-used across the University e.g., Administrator.
Multiplier	People and Money does not provide the option of entering “multipliers” for time payment of time worked. All staff will be required to claim their actual hours worked and to be paid on their Time Cards. All staff should claim hours in accordance with their local workload or time allocation arrangements.
New Hire	A new employee who has not been employed by the university previously.
NINO	National Insurance number.
Nil Pay	As a result of a payroll impacting absence and in line with their Conditions of Service , an employee may receive nil pay instead of half pay or full pay.
NMW	National minimum wage
On boarding	Processes and activity to be carried out between the employees first day and day ninety of employment.
Oracle Payroll	The app/ module on People and Money which is used to run the payroll and pay employees correctly.
Oracle Recruitment Cloud (ORC)	The app/ module on People and Money which is used to advertise, select and hire staff.
Pay date	In general, pay day for the University is the 28th of each month; unless it falls on a weekend, in which case it is the Friday preceding the 28th.
Pay period	1st of the month – Last Calendar Day.
Pending Worker	A pending worker is a person who has yet to start employment. A pending worker record can be created upon acceptance of the job offer in P&M or by manually adding a pending worker record. Upon Day 1 of employment, the pending worker will become an employee.

Position	An instance of a job in a particular department. A “seat /slot” in the organisation structure (sometimes referred to as a “post”), which may be filled by one or more people. All incumbents must have the same grade band and sit within the same department. A position is specific to an individual business unit. Examples – Personal Chair, Manager, Research Assistant, Veterinary Nurse, Finance Administrator.
Provider Portal	Used for the Childcare Voucher Scheme to download / upload changes.
Pre boarding	The activities required to be completed following recruitment and prior to an employee's start date.
Recruitment	All recruiting activities related to Permanent and Fixed Term, Guaranteed Hours, Annualised and Fractional contracts.
Proration	The amount an employee should be paid in relation to the exact amount they have worked.
Rehire	An employee who has previously been employed the university.
Scholarship	The university has numerous scholarship schemes which are funded internally or through external organisations. The Payroll Team are responsible for the management of the end-to-end process for taxable scholarship payments only. Non-taxable scholarships are paid through Finance Operations (Accounts Payable).
Secondment	The temporary transfer to another post for a fixed period. Secondments can be an internal secondment (UoE to UoE), external outgoing or external incoming.
Service Request (SR)	An SR is raised using the Helpdesk tab of People and Money. It is the most efficient way to send forms to Payroll or HR teams to process as needed. Using the correct SR category ensures the form routes directly to the correct team for processing. Service Requests will be used by employees to stop Trade Union payments, to change element rates for Union deductions annually if required and to request a new bank branch / sort code is added to the system (casual workers). Service requests will be used by LMs/SDAs to send payroll forms such as External Examiner and Casual forms. The term service request is used to describe a help ticket, which is opened by the HR Helpline or Finance Helpline teams and sent on to Payroll or other HR teams to process as needed.

Statement of Earnings	Includes details of an employee's earnings, tax paid, and National Insurance contributions.
Stipend	A stipend is a payment granted to a student receiving a scholarship to assist with living expenses.
Subsidiary	The university consists of three subsidiary companies, Edinburgh Innovations, Edinburgh University Press, and UoE Accommodation Ltd. These three companies use People and Money and will be paid by the Payroll Team using People and Money. They have different team structures, and some responsibilities may be different from those in the University of Edinburgh. E.g., the role of HR Operations, School/ Department Administrators.
Substantive Post	An employee's permanent post - the one they return to after a temporary transfer or secondment to another post.
Tax Reference Units (TRU)	Tax reference units (TRU's) represent a legal entity for tax and national insurance reporting (The University of Edinburgh, Edinburgh Innovations, Edinburgh University Press, and UoE Accommodation Ltd)
UUN	Your username is your staff universal username (UUN) that you use to login to most University services, including People and Money and email.
Work Schedule	The working hours and work pattern an employee is contracted to work for each assignment they hold. Work schedules are used for proration of mid-month changes (this was previously calculated on a 365 basis).

Key Roles

Role	Description
Payroll Team	The Payroll Team will have full read and edit access to all payroll screens and reporting. Members of the central Payroll team own key elements of the payroll cycle. They will have full read and edit access to all payroll screens and reporting. The Payroll Team are responsible for ensuring all new employees are correctly set up on Payroll with the correct Tax / NI applied. The Payroll Team are also responsible for ensuring any loans or overpayments are recouped from leavers. For Death in Service leavers, Payroll must ensure no overpayments or overtaken holidays are recouped. They can search for, update or change records, manage service requests and must ensure people are paid correctly each month and all necessary deductions are applied.
Payroll Management Team	Comprising the Payroll Manager and Deputy Payroll Manager. The Payroll Management Team will have access to be able to run retro, Payroll costings, accruals, adjust and transfer the final costings to the Sub Ledger for Finance. They will have read and edit access to all payroll screens and reporting, to provide the ability to produce the required files for HMRC and Third Parties, generate payments and payslips (electronic and printed versions) for all employees.
Employee	All university members of staff will have access to view and update their details, e.g., bank details and address.
Finance Director	The Finance Director will have access to the BACS file and will authorise and release it for payment via the Bottom-line software.
New Hire	All new hires will have access to view and update their details, e.g., bank details and address.
School/ Department Administrators	Staff that provide local administrative/operational support within Colleges or Professional Service Groups for the end-to-end recruitment process, including offline activity and practical arrangements.
Pensions	The Pensions Office is responsible for administering the University of Edinburgh Staff Benefits Scheme, and for providing information on other pension schemes. Pensions team members will carry out appropriate actions when an employee leaves the university.

HR Systems Team	The HR Systems team will have full add / update access to add / amend elements if required (including test systems).
HR Operations	Members of the central HR Team own key transitional elements of the recruitment cycle, e.g., approving/rejecting job requisitions and job offer. They also have visibility of job requisitions without being a member of the Hiring Team. They add casual workers, external examiners and taxable scholarships onto the system before Payroll can process payments.
HR Partner	A member of the HR Partnering team who can provide advice and guidance throughout the recruitment process with specific responsibility for Grading Job Descriptions and supporting HR Operations if any issues found at the 'Before Offer Check' stage.
Tax team	The Tax team are an escalation point for guidance on complex employee tax matters where work is undertaken outside of the UK and the reporting of Benefits in Kind/PAYE Settlement Agreements (PSA). The Tax Team have no People and Money access.
Business Approver	Approval will go up through the Payroll Team route (following up the hierarchy) in line with the Guide to Employment and Finance Approvals
Research Finance Administrators	Research Finance Administrators are a new user role with a set of access privileges in P&M. These individuals are based in the research support offices of schools and are responsible for managing directly incurred research salary costs.
Finance System and Support team	The Finance Systems team will have full add / update access to add / amend elements if required (including test systems). From August 22, Finance Systems will add new Bank (Branch/ Sort code) details where they are missing or not recognised in the system as this will impact on sort code validation.

Before you start

Familiarise yourself with the [People and Money User Guides](#) and the [end-to-end Process User guides](#) for the HR processes which all impact on Payroll. They are referred to at relevant stages within this guide. For any updates to HR Processes, check the [People and Money Updates webpage](#). Guidance for payments to staff can be found on the [Finance Specialist Service SharePoint](#)

Familiarise yourself with the different contract types the University can offer by reviewing the [Contract types guidance](#) and [Conditions of Service](#).

To help you use this document, check the role you have been assigned in People and Money. To request access to a specific People and Money role e.g. GH Administrator, SDA or Timekeeper complete the [People and Money Access](#) Form and submit this via a service request using the category Enquiry > System Related > User Access – New Change.

People and Money overview

People and Money is a cloud-based system which means that it receives regular quarterly updates. It is an integrated system which underpins the University of Edinburgh's HR, Payroll, Pensions, and Procurement processes.

Existing payrolls have been merged into one payroll: UoE Group with 4 Entities, each with its own Tax Reference Units (TRU)

- University of Edinburgh
- UoE Accommodation Ltd
- Edinburgh Innovations Ltd
- Edinburgh University Press Ltd

The system allows greater automation of processes and tasks, with element entries fed by calculation cards. There is automatic calculation of pro-rata of pay, including back pay. The system also enables the import of data from other sources.

Finally, the People and Money system is date driven. This is important as the information that you retrieve when will be accurate as at either today's date or the date selected.

Pay dates, Pay periods and Payroll cut-off

The University has a payroll calendar, with set payroll periods. All payroll input must be completed in a timely fashion to enable the payroll to be run on the published dates.

In general, pay day for the University is the 28th of the month unless it falls on a weekend, in which case it is the Friday preceding the 28th. Pay dates and Payroll cut-offs may also differ in the month of December due to the Festive Closure. Please see [Pay Dates and Payroll Deadlines](#) for specific dates and cut-offs.

New starts pay date: From April 2022 onwards, individuals who begin work at the University after the Payroll has run will not be paid until the following month's pay day.

When new employees are added to People and Money, they are classified as Pending Workers until their start date, at which point they will be converted to employees. If a pending worker does not convert to an employee by the time the Payroll is run, they will not be paid for that month.

The new employee's record must have all the pay-impacting information in the system by the time the Payroll is run. The payroll is usually run a day or two after the Payroll cut-off date each month.

Pay Period: 1st of the month – Last Calendar Day

Cut-off dates: These are the dates that information must be supplied by joiners, employees and colleagues in Schools and Departments to be actioned by the relevant team to meet that month's pay date. All supporting information must be provided with necessary approvals. Failure to do so may mean that the employee does not receive their payment as expected.

Process	Processed by	Submission cut-off date
New Externals Examiners, Casuals Workers and new Taxable Scholarships must be submitted to HR Operations by Service Request, using the appropriate category as outlined in the Guide to Service Requests .	HR Operations	by the 3 rd of the month
Externals Examiners claim forms submitted via Service request using the appropriate category as outlined in the Guide to Service Requests .	Payroll	by the 7 th of the month
Approved Time Cards in P&M	Payroll	by the 10 th of the month
Submission of monthly time claim bulk upload spreadsheet (for small number of agreed areas)	Payroll	by the 7 th of the month
Contract requests, joiners, contact changes, leavers must be actioned by HR to meet that month's pay date	HR Operations	by the 9 th of the month
Salary costing changes	Payroll	By the 10 th of the month.

Access by user group

Candidates can update their **personal details** through the external careers site, and this will be displayed on their record in Oracle Recruitment Cloud. Should they wish to submit further additional attachments they must email these to the Hiring manager or SDA.

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

Casual workers/Taxable Scholarships and **External Examiners** are not able to update their **personal details** on People and Money and should refer to the [relevant guidance](#) when changes to personal details are required.

Users from subsidiaries have access to People and Money and can update their **personal details** via the Self-Service transaction 'Update Personal Details' in People and Money. Should they wish to submit further additional attachments they must email these to the Line Manager or SDA.

Pay query management

Finance Services including Payroll and Pensions have all their resources held within the [Finance Services SharePoint site](#). If users have any queries about payroll or time recording processes, they should refer to the relevant page where they will find guidance and links to relevant forms.

If the user is in the People and Money system already, they can Search My Knowledge for support in the first instance. Follow the P&M user guide '[How to search my knowledge](#)'. This will link the user to the [Finance Services SharePoint site](#). If they cannot find the information they need, the user should raise a service request (SR) using the correct payroll category as per the [Guide to Service Requests](#), which will route directly to the Payroll Team. For further guidance on how to raise a service request, follow the '[How to raise and maintain a service request enquiry](#)' user guide. Alternatively, if you do not have access to People and Money, you can raise a Service Request by emailing HRHelpline@ed.ac.uk.

If users have any queries about [Pensions Team](#) processes, they should refer to the relevant page where they will find guidance and links to relevant forms. If the user can't find what they are looking for they can submit a query using the [Helpline Query Form](#). Queries will be answered within five working days.

Accessing Payslips and P60s on People and Money system

Guidance on how to view your payslip is available on the [People and Money User Guide](#) webpages.

Create an SR in Help Desk; open service requests then select Enquiry. Choose Payroll as the category and Pay Enquiries – General as a subcategory, this will route the request directly to the payroll team for them to process.

If you have multiple assignments, payments for each role will appear on the same payslip; however, your assignment number will be followed by a dash and an applicable number, such as -2, to distinguish which role the payment is for.

Your annual salary is not visible on your payslip. Please see the section below on [Viewing Salary Information](#) for further details.

Access to paper payslips

Colleagues who receive a paper payslip will continue to have these sent to their home address because they do not have ready access to a laptop. However please note if you have a smart phone, you can add the People and Money app onto your smart device and access your payslip from there.

To do this follow the [How to access People and Money from Any Device](#).

Historic Payslips and P60s (prior to April 2022).

Payslips and P60s prior to April 2022 are not available in People and Money. Payslips that pre-date April 2022 can be requested from payroll.

Viewing Salary Information

Staff can see their salary by navigating to Me > Personal Information > My Salary. The reason for the change (action and action reason), FTE, Grade and Grade step will also be visible from this area. Full time equivalent (FTE) is the number of hours worked per week divided by 35* hours. E.g. 28 hours per week = $28/35$ = 0.8 FTE.

* Change this figure to the full-time contractual amount for your role e.g. if you are paid based on a 40-hour working week, 40 should be used instead of 35.

The annual salary displayed is the full-time salary. If the employee works part-time or on an annualised, fractional or guaranteed hours (GH) contract we have provided details of how to calculate this within the guidance. The full-time salary does not include any allowances or additional payments an employee may receive.

Please review and follow the steps within the ‘Employee Guide - How to view assignment details and salary information’. This is available on the [People and Money user guide](#) webpage under the HR > Personal Data Maintenance and Payroll headings.

Please Note:

In the **Prior Salary** section the **earliest salary shown** is as at October 2020 when we implemented People and Money.

Pay impacting changes are shown on the specific date they occurred. These changes could be due to a pay award, increment, statutory change or actions taken to an employee’s record (e.g. promotion, transfer, change of hours). In some instances, the prior salary history may not have resulted in an actual change in salary.

Please also be aware that **Grade Step Rate Synchronization** action occurs when system adjustments are made to specific pay grades, even if the employee is not in that grade. For example, when the National Living Wage changes, all staff will see an entry labelled "Grade Step Rate Synchronization", regardless of whether the change affected their specific grade and salary at the time.

Work Schedules

The Work Schedule Assignment functionality shows an employee's work pattern and their availability against that pattern. It is used to calculate annual leave accrual and pay impacting absences e.g., SSP, SMP, etc. It is also used to calculate the pro-rated pay for mid-month changes in respect of certain element values e.g., salary in respect of a mid-month starters/leavers.

A work schedule is attached to the employee's assignment. An employee can have more than one work schedule assignment (for example, if they have multiple assignments). It is critical that when an employee's work pattern changes their work schedule is also updated. For further information refer to the [Guide to Work Schedules](#).

An employee or Line Manager can view how the schedule impacts a particular day by using the Team Schedule app.

Proration Calculations

Hourly rate is calculated on Full-time equivalent pay / 52.143 / weekly contracted hours.

Work schedules are used for proration for mid-month changes (previously 365 basis).

The way pro-ration works in People and Money is different from the Legacy System. Work schedules are used for proration for mid-month changes (this was previously calculated on a 365 basis).

[Appendix 1](#) contains a table which gives further details.

New starters

From April 2022 onwards, individuals who begin work at the University after the Payroll has run will not be paid until the following month's pay day.

When new employees are added to People and Money, they are classified as Pending Workers until their start date, at which point they will be converted to employees. If a pending worker does not convert to an employee by the time the Payroll is run, they will not be paid for that month.

The new employee's record must have all the pay-impacting information in the system by the time the Payroll is run. The payroll is usually run a day or two after the Payroll cut-off date each month.

Employees

The [Guide to Recruitment & Onboarding](#) process outlines the steps prior to payroll involvement. All new employees or anyone returning to the University will be assigned with an Onboarding Journey, a series of tasks that line managers, school-department administrators (SDAs) and the employee must complete. All For new starts, the Welcome to the University or Rejoining the University Journey are automatically assigned upon offer acceptance or at the add pending worker stage. Further information on Journeys is available in the [Guide to Journeys for either employee, line manager or SDA](#). It is particularly important that completion of the payroll related tasks are actioned and marked as complete no later than Day 1 of employment. These tasks are titled as follows:

- Getting paid - Enter your bank detail' task. (before day1 task for new hires only)
- Provide your tax information for HMRC (day 1 task)
- Check your bank details for your salary are correct (day 1 task for both new hires and rehires)

This step includes how to successfully complete a new starter record initiated by HR, which is to be included on Payroll. All new starters will originate as a pending worker from ORC. All necessary details required for Payroll will be provided from the ORC record and / or the new employee. Tax information will be provided from a P45 or a new starter declaration.

Role	SDA/LM	HR Operations	Employee	Payroll	System
Process to add new employees	1) Follow the end-to-end Recruitment and on boarding process. 5) Review outstanding tasks assigned to the employee, for example it is important to check and remind the candidate to submit their bank details and update all personal details which is essential for Payroll and Pensions.	2) Follow the necessary steps of the end-to-end Recruitment and on-boarding process, ensuring that the new employee is entered into the system accurately, with the relevant salary data	3) Completes 'Getting paid - Enter your bank detail' task. (before day1 task) 4) Completes 'Provide your tax information for HMRC' and 'Check your bank details for your salary are correct' (day 1 tasks) Note – if employee is a rehire they will still need to complete these tasks	6) Receive a P45 daily report to indicate New Starters have uploaded P45 7) Update employees Tax Details	8) An email will be generated by the system if Payroll adds/amends an employee's bank details and saves it in self service.
Supporting Documentation Guide to Recruitment & Onboarding Process Guide to Journeys for either employee, line manager or SDA Guide to Guaranteed Hours Guide to Work Schedules					

Casual workers

Payroll are responsible for ensuring all new casual workers are correctly set up on Payroll with the correct tax/NI applied. Please read the [Guide to Casual Workers](#) for information on how to manage HR processes that impact Employee-Casual worker types.

Role	Casual Worker	Line Manager/ SDA	HR Operations	Payroll
Process to add new casual workers	1) Complete the relevant sections of Form 100 and sign 2) Provide Right to work documentation to LM/SDA for checking	3) Complete and relevant sections of Form 100 and sign 4) Check Right to Work documentation and raise SR through the Forms > New Casual Worker category and attach the Form 100 and RTW documentation.	5) HR Operations process new casual starter on receipt of SR with Form 100 and RTW documentation from School/ Dept and pass SR to payroll	6) On receipt of SR from HR Operations, Payroll will add the bank details to the casual worker record and will ensure the correct tax / NI is applied using the information provided on the P45 or New Starter Checklist. 7) Close SR which notifies School/ Dept that payment will be made in the next available payroll run.
Supporting Information Conditions of service – Casual Workers Ad-hoc Payment - Agreement for Casual Workers (Form 100)				

External examiners

Please read the [Guidance for External Examiners Fee & Expenses Payments](#) to ensure you understand how Examiner Fees and Expenses are to be managed.

To ensure the relevant information is received by the correct team as quickly as possible, please select the correct SR category.

- Select SR category - **External Examiners Details** and request will be routed straight to HR Operations to add new External Examiner onto system
- Select SR category - **External Examiners Timesheets** and request will be routed straight to Payroll to process timesheet

Please read the [Guide to Casual Workers](#) for information on how to manage HR processes that impact Employee-Casual worker types.

Role	External Examiner	Line Manager/ SDA	HR Operations	Payroll
Process to add new External Examiner record onto People and Money (Taught Programmes – External Examiner Fee Payments for UG and PGT Fees)	1) Complete the relevant sections of External Examiners Details form and sign 2) Provide Right to Work (RTW) documentation to LM/SDA for checking	3) Complete the relevant sections of External Details Form and sign 4) Check Right to Work documentation and raise SR through the Interim Forms > External Examiner category and attach the External Examiner Details Form and RTW documentation	5) HR operations receive new external examiner starters via SR with completed External Examiners Details Form and all RTW documents 6) Complete RTW checks and return to sender if there are any issues 7) Set up External Examiner on People and Money and confirm process complete to engager 8) Send completed paperwork to Payroll via SR.	8) On receipt of SR from HR Operations, Payroll will add the bank details to the external examiner record and will ensure the correct tax / NI is applied using the information provided on the P45 or New Starter Checklist. 7) Close SR.
Complete External Examiners Timesheet		1) Complete and relevant sections of External Examiners Timesheet form (Form 96B) and sign 2) Sends document to local approver for approval (offline) 3) Raises SR - Select SR category - External Examiners Timesheets to request payment of payment.		4) Receives SR 5) Check approval has been provided 6) Adds payment amount 7) Marks SR as resolved

		Approval of payment must be attached/ included in SR 8) Resolved SR indicates payment has been added successfully and they will receive the payment on the next Pay Day		
Supporting Information External Examiner Details form (Form 95A) External Examiner Timesheet (Form 96B) Guidance for External Examiners Fee & Expenses Payments				

Scholarships

Please use the [Student Tax Checker](#) to determine correct routing of taxable payments. If the payment is Non-Taxable, the scholarship process is managed by Finance Operations - Accounts Payable. This section covers the process for Taxable Scholarships paid through Payroll.

Please read the [Guide to Casual Workers](#) for information on how to manage HR processes that impact Employee-Casual worker types.

Role	Student	School/ Dept	HR Operations	Payroll
Process to add New Taxable Scholarships	1) Complete relevant sections of Taxable Scholarship Form (Form 98a) and sign 2) Return form to School/Department contact	3) Complete and relevant sections of Taxable Scholarship Form (Form 98a and sign to show approval 4) Check Right to Work documentation and raise SR through the Interim Forms >Scholarships/Studentships category and attach the form and RTW documentation	5) HR operations receive form via SR with completed Form 98a (plus all RTW documents) 6) Complete RTW checks and revert to engager if there are issues 7) Set up Taxable scholarship on People and Money and confirm process complete to engager. 8) Send completed paperwork to Payroll via SR.	9) On receipt of SR from HR Operations, Payroll will add the bank details to the Taxable Scholarship record and will ensure the correct Tax / NI is applied using the information provided on the P45 or New Starter Checklist. 10) Close SR.

Taxable Scholarship Changes	1) If there has been a change to bank details, complete Scholarships Bank Mandate Form and raise SR to Payroll through the Enquiry >Bank Details category and attach the form	1) Any changes to Scholarships/Studentships payment details are notified to HR Operations by raising SR and attaching Taxable Scholarship Change Notification form	2) On receipt of Taxable Scholarship Change Notification form, make the relevant updates to People and Money and pass the SR to the Payroll Team for awareness.	2) Update Student bank details 3) Close SR
Supporting Information Payments to Students Scholarships – Bank mandate Student Tax Checker Setting up a taxable Scholarship payment Taxable Scholarship Notification of Change Form Scholarships/Studentships Form (Form 98)				

Job Changes

The [Guide to Job Changes](#) process outlines the steps prior to Payroll involvement.

Time Recording

The [Guide to Time Recording](#) outlines the steps that an employee, line manager and timekeeper must take prior to Payroll involvement. Please pay particular attention to the sections on viewing and editing approved/submitted Time Cards and the Time Card freeze.

Process Time Entries

Process Time Entries refers to the processing of submitted and approved Time Cards to ensure employees are paid for the hours worked, as well as the funds being sourced accurately. This process is carried out by the Payroll Team, who may provide feedback to Time Card approvals if any errors occur.

Role	Payroll	Approvers
Process	1) Payroll approves time data for time entries approved by Line Managers prior to the current month 2) Upload of approved timesheets to OTL 3) Identify errors 4) Resolve errors and warnings 5) Feedback given to approvers 7) Re-submit the Load Time Cards batch	6) If errors are found, will be notified by payroll to avoid recurrence in future
Supporting Information Employee Guide to Time Cards Line Manager Guide to Time Cards Timekeeper Guide to Time Cards		

Bulk Uploads into OTL

For most staff, overtime and GH hours should be submitted and approved by completing Time Cards in People and Money.

Bulk upload is the upload of Time Card information from a spreadsheet to People and Money. This Bulk timesheet form has been provided to pre-approved areas. This bulk timesheet form can be used to upload multiple Time Cards to People and Money.

Updated templates will be used when generating spreadsheets, instead of the multiple variations of spreadsheets currently received. The template mirror the Time Cards and contains the pay elements and the Chart of Accounts costing. Line Managers or Timekeepers should double check the assignment numbers are correct for employee's making claims.

Completed templates should be sent via email to payroll.manager@ed.ac.uk

Line Managers will update generated spreadsheets with time worked by their direct reports. The Payroll Team will retrieve and upload these and upload the time worked directly to OTL (not directly to Payroll). Time worked will then be transferred to payroll, so the employees are paid for the hours worked.

Role	Line Manager/Timekeeper	Payroll
Process	1) Complete the appropriate Bulk timesheet 2) Managers will enter the time worked for each of their direct reports for the appropriate period 3) Updates will be entered on the spreadsheet and sent via email to payroll.manager@ed.ac.uk	4) Payroll receive completed spreadsheet template by email that have been updated by managers, by agreed deadline. The spreadsheets must be saved as a CSV file for loading into OTL 5) Check files for accuracy/ completeness and revert to Line Manager/ Timekeeper with any issues 6) Load into OTL (in bulk) 7) Resolve errors by checking individual employment record and amending 8) Submit corrections

Monitoring Time Card Submission

The process of monitoring time input throughout a pay period is carried out using the Timekeeper's Dashboard.

Role	Payroll	Timekeeper	Line Manager
Tasks	1) Views timesheet dashboard. Monitors issues and trends with the Time Card status 2) Escalates appropriately, if there are issues	3) Takes action to rectify the issue	3) Takes action to rectify the issue
Supporting Information Guide to Timekeeping Timekeeper Guide to Time Cards Line Manager Guide to Time Cards			

Monthly Time Card Freeze

To minimise the risk of this serious difficulty arising, a Time Card freeze will be in place on editing between 11th and 20th inclusive of each month (apart from December). This means employees, line managers and timekeeper **must not** edit the approved Time Card before it has been transferred for payment. For example, December Time Cards approved/submitted by cut-off on 10th January, should not be edited between 11th and 20th January inclusive to ensure payment on 28th January. The system cannot prevent a change being made so we will clearly and routinely communicate to users.

Final Time Card submissions for leavers

Where an employee submits hourly based time, including Guaranteed Hours, overtime etc. a Time Cards must be submitted by the line manager/ timekeeper **before** the last day of employment. The Time Card is not available to the line manager or timekeeper after the termination date.

In **exceptional circumstances**, where the line manager/timekeeper has been unable to submit an employee's Time Card prior to their last day of employment the **GH Final Time Card Form or Overtime Final Time Card Form** can be used to make payment if submitted to Payroll via Service Request by the payroll cut-off date. Further details on this process and the forms can be found on the Finance Specialist Services SharePoint [Payments to Staff](#).

Role	Timekeeper/Line Manager	Payroll
Tasks	1) Submits the final Time Card through the time and absences app or in exceptional circumstances, completes the GH Final Time Card or Overtime Final Time Card form 2) Raise an SR through the Enquiry > Pay Enquiry – General category and attach the form and line manager approval.	4) Approve the Time Card or Upload time worked to OTL if via form 5) Transfer time worked to Payroll and pay individual in the next available pay day
Supporting Information Guide to Time Recording GH Final Time Card Form Overtime Final Time Card Form Finance Specialist Services SharePoint Payments to Staff		

Adding and maintaining in-employment allowances

Allowances can be added during the hiring process. Details are covered in the [Guide to Recruitment and Onboarding](#). Allowances for current employees can be added or amended by completing the Add, Amend or End Allowance form and submitting a Service Request via Interim Forms – Add, amend or end an allowance. Further guidance on in employment allowances is available within the [Guide to Job Changes](#).

Role	Line Manager/SDA	HR Operations	Employee	Payroll
Process - Adding and maintaining an employment allowance for current employee	1) Complete the Add, Amend or End Allowance form for a new allowance or amending an existing allowance and seek offline approval. 2) Raise Service request to request to add, end or amend an allowance. Select the Add, amend or end an allowance SR category.	3) Update employee records on People and Money and send out appropriate correspondence to employee.	4) Receives correspondence from HR Operations confirming allowance.	5) Any backdated allowances will be picked up via Payroll reporting.

Payroll impacting Absences

The following guides outline the steps prior to Payroll involvement. The following guides can be found on the [People and Money Guides page](#):

- Guide to Annual Leave
- Guide to Work Schedules
- Guide to Adoption and Surrogacy leave
- Guide to Maternity Leave
- Guide to Partner, Parental and Special leave
- Guide to Shared Parental leave
- Guide to Sickness Absence

The following [Demo videos](#) are available which show an employee, Line Manager or SDA how to view, add and amend all absence types – sickness, family leave etc.

- How an employee applies for annual leave
- How a LM approves Annual leave & absence
- How to Update Unpaid leave
- How to add Partner/ Parental/ Special leave
- How a Line Manager processes sickness absence
- How an SDA processes sickness absence

The system has the following functionality in relation to absence.

- Absence eligibility is built in the system, based on entity, service, grade and earnings
- System calculates both occupational and statutory pay
- Half pay and nil pay will trigger automatically
- The system will calculate pension contributions based on scheme rules (e.g., actual v notional)
- The assignment work schedule is used to calculate pay per month
- Salary & allowances are paid and offset against occupational and statutory pay
- Additional steps for multi-assignment for all absences (except annual leave)
- Retro will reprocess absences and adjust pay and pension automatically
- Employers top up for pension contributions is system calculated

Payroll Absence letters

Letters will be generated by the system as a result of Payroll Absence processes. These letters will be posted to the employee's home address and line manager's office address (marked private and confidential).

Letter	Description
Half Pay Letter	Letter produced for employees who have exhausted full pay sickness entitlements and will be moving to half pay.
No Pay Letter	Letter produced for employees who have exhausted half pay sickness and will be moving to nil pay.
Sick Pay 28 Weeks	Letter produced for those employees who have received 28 weeks' sick pay.

Maternity Pay SMP1 Letter	Letter produced for employees who do not meet the eligibility for SMP and required an SMP1 form to be issued.
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Third party deductions

The processes involved in attaching Third Party deductions to employee's salaries, including Court Orders, Trade Unions, Charitable giving and Salary Finance. Guidance on Charitable Donations can be found on the Finance Specialist Service [SharePoint](#).

Information in relation to this can also be found on the [HR webpages](#).

Third party payees will be configured on the People and Money system. Payments will be based on values generated from either a calculation card e.g., court order, or an element entry e.g., union contribution. These Third parties are paid via the Manage Third Party Payments process. The processes below illustrates how these deductions are managed at employee level.

Role	Payroll	Employee	Finance Systems team	External Authority/provider
Add a deduction based on a Court order	2) Payroll check if the Court exists as a Third-Party Payee on the system 3) If the issuing authority does not exist in the system, Payroll will contact Finance Systems to request this new Third Party Payee is set up 5) Enter the order details on employee pay record via calculation card	6) Court order will be deducted from employee's salary	4) Finance Systems receive request to create a new third party payee on the system	1) Notifies the Payroll Team of court deduction (offline)
Third party – new joiners process e.g., Trade Union (TU), Give as You Earn (GAYE), Credit Union, AIG (Health)	3) Apply the deduction to the employee record via element entry	1) Employee applies to join.		2) Provider notifies payroll of new joiner (offline)

Third party – leavers process e.g., Trade Union (TU), Give as You Earn (GAYE), Credit Union, AIG (Health)	2) Apply change to the employee record 3) Future deductions are ceased 4) Mark SR as resolved which notifies the employee that the request has been processed.	1) Employee raises SR or contacts Provider directly to request to leave TU or cease deductions 5) Employee is notified through SR that change has been applied		1) Provider notifies payroll of leaver (offline)
Third party – annual change to deductions rate	4) Payroll notified that change has been made		2) Finance systems change rates on impacted elements 3) close SR which notifies payroll of change	1) Trade Union notifies Payroll of new rates via letter or through Finance Helpline (offline)
Adding Charities Aid Foundation (CAF) Process (Payroll Giving)	2) Apply deduction to employee record 3) Payroll check if deduction if for a UoE charity 4) If yes, then contact Development and Alumni to enable them to contact employee (offline)	4) Employee contacted by Development and Alumni if UoE charity		1) Charities Aid foundation email deduction instructions
Applying for Salary Finance Process	3) Payroll log into Salary Finance portal (offline) 4) Verify employee details (Dob, Service and earnings) to confirm	1) Employee applies to provider for Salary Finance		2) Provider informs UoE of application per member (offline)

	employee eligibility and confirm eligibility to provider.			
Salary Finance Deduction Process	1) Log onto provider portal on 10th of month 2) Download extract of deductions (2 lists – loans & savings) 3) Batch upload deduction elements to employee records 4) Once payroll has been run deductions will be reconciled against monthly Salary Finance deductions spreadsheet 5) Upload file of deductions back to provider portal 6) Check for any errors 7) Notify provider of any errors via portal (offline)			

Process non-recurring payments

The processing of non-recurring payments and payments and deductions related to salary sacrifice schemes.

In most cases, additional payments to employees outside their monthly salary should be made via the [Time Recording](#) App on People and Money. There are circumstances in which these additional payments due to employees outside their monthly salary cannot be made via the Time Recording App. This includes (but is not limited to) the following payment types:

- NHS expenses (NHS via post sent directly to the Payroll Team)
- Fees
- Compensation agreements
- Termination payments that are not automated.
- Bonus
- Ex-gratia
- Loan payments
- Additional Duty Hours
- Out of Hours payments
- Overtime (including call-out payments) for Grade 6+ employees

Temporary Additional Payments (TAP) form

Payments Submitted via a Temporary Additional Payment (TAP) Forms are for the following exceptional circumstances only:

UE06 + Overtime

Grade 6+ staff are not able to make any overtime claims via Timecards and should not be making these claims as per the Conditions of Service, unless there are agreed exceptions:

- To pay overtime which has been worked to cover another employee's absence when an employee is Grade 6+
- To pay overtime to cover extended opening times when an employee is Grade 6+
- To pay On Call payments when an employee is Grade 6+

Payment of these hours can be submitted via a TAP form selecting the: **UE06+ Overtime reason**.

Casual Work out with Primary Post

If an employee has an active assignment with the University and is engaged to undertake Casual work on a temporary basis out with their primary post, then payments claims can be submitted under this reason via a TAP form.

Please note, employees who complete Casual Work out with their primary post should ensure that they review the 'Other Paid Employment' section of their [Conditions of Service](#).

Hiring Managers must ensure that this work is being undertaken under the correct contract type, if unsure they must speak with their HR Business Partner.

Guaranteed Hours (GH) Surplus

To pay a Surplus of GH hours where an employee has not worked the minimum guaranteed hours, a discussion with an HR Advisor/Partner should take place to confirm whether the employee was offered the hours and declined them or had not been offered them at all.

HR approval must be in place prior to the Payment being requested and approved by the Head of School / Department, and can then be submitted using this reason via a TAP form.

Other - Agreed upon exception with Head of HR/HR Partner

If a Time Type rate is not available on the Timecard on P&M record, please speak to your Head of HR or HR Partner to seek approval to pay at a rate out with the person's contractual Hourly rate.

HR approval must be in place prior to the Payment being requested and approved by the Head of School / Department, and can then be submitted using this reason via a TAP form.

Access the TAP Form

The Temporary Additional Payment (TAP) form can be accessed via the Finance forms page, under the payroll forms section: [Monthly Paid University Employees: Temporary Additional Payments Form](#)

TAP Approvals requirements: From 03 August 2026:

As all payments requested via a TAP form are for exceptional circumstances only, then they **must be approved by the Head of School/Director of professional services or equivalent level**.

Evidence of the approval must be provided with the submission of the Service Request (SR) to Payroll with the TAP form.

To raise a [Service Request on People & Money \(P&M\)](#): selecting **Category>Enquiry>Payroll>TAP Form**. Attaching the TAP Form and a copy of the Approval evidence from Head of School/Director of professional services or equivalent level.

Please note that completion of the Head of School/Director of Professional Services or Equivalent level being included on the TAPS form does not provide the required evidence of the approval. Evidence of this approval must be attached to the SR along with the TAPS form. This can be a copy of the email showing that this level has been made aware of the TAPS being submitted and that they provide their approval for this to be paid.

The name documented on the TAPS form must match who has provided written evidence that they have reviewed, are aware of the payments being requested and provide their approval.

Forms without this level of approval will not be paid and will be returned to the submitter.

Any approval delays that miss the payroll cut off (7th of the Month) will not be paid until the following months payroll.

Payroll Payment Request form

The [Payroll Payment Request form](#) can be used to make non-recurring Fee, Additional Duty Hours or Out of Hours payments to employees. Separate guidance is available on how to process [External Examiner Timesheets](#) and [Visa Loans/Reimbursements](#)

Role	Originator (Line Manager/ SDA)	Payroll	Approver
Process	1) Complete relevant forms (offline) 2) Sends document for approval (offline) 5) Follows guidance on relevant form to determine how to send the form to the Payroll Team 8) Receives request for more approval (if required) 9) Seeks additional approval from Approver 10) Resubmit request with approval evidence attached 14) Receives confirmation that request has been processed.	6) Receives request and checks approval has been provided 7) If insufficient approval, return request to initiator 11) Receives SR once approved 12) Adds non-recurring element 13) Confirms request has been processed	3) Provides approval, seeking information from the originator if required 4) Returns approved supporting documentation to originator
Supporting Information Temporary Additional Payments (TAP) form Payroll Payment Request Form			

Cycle Scheme Process

Details relating to the University's salary sacrifice arrangements including the Cycle to Work Scheme can be found on the Finance Specialist Services [SharePoint](#)

Role	Employee	Payroll Team	External third party	Finance Operations
Process	1) Employee applies to participate in a cycle scheme via My Lifestyle portal 6) If on a Fixed Term Contract, confirm contract end date to payroll (including confirmation from manager)	3) Receive details from provider (offline) 4) Check applicant meets criteria; contract duration is sufficient and completes minimum wage check 5) If meets criteria confirm to Provider or check with Employee and Line Manager if contract is being extended. If not, the loan application is rejected (offline) 7) Set up recovery element (over 12 or 18 months) 9) Payroll arranges for monthly invoice to be paid via AP (offline)	2) The Provider of the cycle to work scheme will forward details of all new applicants and relevant input values to the Payroll team to confirm if they meet the scheme criteria (offline) 8) Once a month, send invoice to UoE for all scheme approvals in that period (offline)	10) AP pay monthly invoice
Supporting Information My Lifestyle Cycle 2 Work				

Electric Vehicle Salary Sacrifice Process

Details relating to the University's salary sacrifice arrangements including the Electric Vehicle Scheme can be found on the Finance Specialist Services [SharePoint](#).

Any changes to employment status, such as family leave, sickness absence, salary adjustments, or termination, could impact the financial arrangements that have been established under this scheme. Employees must carefully consider the impact of the benefit on take-home pay. Further information can be found on the [Pay & Reward SharePoint](#).

Role	Employee	Payroll Team	External Third Party	Finance Operations
Process	1) Employee applies to participate via Tusker portal and selects a car make, model, contract length and mileage. 7) If on a Fixed Term Contract, confirm the contract end date to payroll (including confirmation from the manager).	4) Receive details from the provider. 5) Check applicant meets the criteria - contract duration is sufficient and completes minimum wage check. 6) If an employee meets the criteria, confirm to the Provider. If not, the application is rejected (offline). 8) Set up recovery element (over employee selected contract duration) 10) Payroll arranges for monthly invoice to be paid via AP (offline) 12) Inform provider of any changes (offline)	2) The Provider of the scheme will forward details of all new applicants and relevant input values to the Payroll team to confirm if they meet the scheme criteria (offline). 3) Scheme provider performs necessary checks related to driver and insurance eligibility 9) Once a month, send the invoice to UoE for all scheme approvals in that period (offline)	11) AP pay monthly invoice
Supporting information Staff Benefits & Discounts				

Tusker Electric Vehicle Salary Sacrifice Scheme

Process Childcare Vouchers

Details relating to the University's salary sacrifice arrangements including Childcare Voucher scheme can be found on the Finance Specialist Services [SharePoint](#). Employee's can update their Childcare Voucher scheme with a change or they can request to leave the scheme.

It should be noted that no new applications can be received for the Child Care Vouchers scheme as this scheme is now closed and only remains for existing recipients.

Role	Employee	External third party	Payroll Team	Finance Ops
Process	1) Employee updates the Childcare Voucher portal with a change or request to leave the scheme (offline) 12) Changes will be visible within next available payslip.	2) Updates provider portal with change (offline).	3) Logs on to provider portal to download changes (offline) 4) Complete minimum wage and Tax value checks 5) If check shows impact would be employee going below threshold, then update the provider portal and email employee accordingly to explain that the change is not possible. 6) If check is fine, action changes on employee record ensuring effective date is entered. 7) Element is end dated for leavers to the scheme 8) Upload changes on provider portal (offline) 9) Payroll will generate an invoice for the total monthly Childcare Vouchers for UoE after uploading the changes.	10) Childcare voucher invoice is paid by AP through Faster Payment 11) Invoice paid is to be reconciled to payroll gross to net report/element listing.

Supporting Information[Salary Sacrifice Arrangements](#)[Sign in to your childcare account - GOV.UK \(www.gov.uk\)](#)

Salary Sacrifice (Childcare Vouchers) Annual Assessment

At the beginning of April each year, Payroll check all employees' salaries that are in the Childcare Voucher Salary Sacrifice Scheme to ensure the amount of vouchers they are receiving is appropriate.

Role	Payroll Team	Employee	External third party
Process	1) Assess employees in receipt of Childcare vouchers to confirm if they have moved into a higher tax band 2) If yes, do they have protected status (in scheme pre-2011) 3) If no, reduce contributions on employee record 4) Update provider portal with new reduced contribution amount (offline) 6) Notify employee.	7) The employee is informed that their contribution amount for the childcare voucher scheme has been reduced due to them moving into a higher tax band.	5) Receives notification through portal that contribution has been amended.

Supporting Information[Salary Sacrifice Arrangements](#)[Sign in to your childcare account - GOV.UK](#)

Process Workplace Nursery

Details relating to the University's salary sacrifice arrangements including the Workplace Nursery can be found on the Finance Specialist Services [SharePoint](#). Employees can apply to the Workplace Nursery scheme after successfully securing a nursery place. Employees who are on Maternity Leave cannot join the Workplace Nursery scheme until they return to work.

Role	Employee	Payroll Team	HR Operations
Process	1) Employee raises an SR using Enquiry > Childcare/Workplace Nursery with relevant Workplace Nursery form 4) Contacted by Payroll via SR with explanation of rejection (if applicable) 8) Receives confirmation letter from HR Operations confirming contractual changes as a result of original request	1) On receipt of the SR, check that the employee meets the national minimum wage criteria 2) If yes, update People and Money with salary sacrifice deduction, if no, contact employee via the SR to confirm reason for rejection 5) Payroll send SR to HR confirming new applications, leavers, changes via the original SR	6) For successful applications, changes, or leavers, HR Operations receive SR from Payroll via the Childcare/Workplace Nursery Category 7) HR Operations will send letter to confirm the contractual changes to the employee as a result of their original request
Supporting Information Salary Sacrifice Arrangements			

Process Other earnings and deductions (one off data loads)

This process relates to the processing via payroll of other earnings payments and deductions. Specifically, those received on one-off data loads to be uploaded to payroll on an ad-hoc basis. For example,

- Strike deductions from pay – Follow the University's process for declaring [Industrial action](#)
- Contribution awards (lump sums) – Data loader supplied to Payroll by Reward team in HR
- Additional Voluntary Contributions (AVCs) – Pensions team will update calculation card
- Edinburgh Innovations (EI) annual bonus – Data loader supplied to Payroll by Edinburgh Innovations
- Fees from Edinburgh Innovations (EI) – Data loader supplied to Payroll by Edinburgh Innovations

Role	Initiator	Payroll Team
Process	1) Spreadsheet completed locally (offline) 2) Completed Spreadsheet templates should be sent via email to payroll.manager@ed.ac.uk	3) Retrieve emailed spreadsheet template and upload to Payroll

Process for KIT/SPLIT Days

The following guides outline the steps prior to Payroll involvement. The following guides can be found on the [People and Money Guides page](#).

Guide to Maternity Leave

- Guide to Adoption and Surrogacy Leave
- Guide to Shared Parental Leave

Role	Line Manager	Payroll
Process	1) The Line Manager raises an SR to record KIT/SPLIT days. To submit the form, go into Help Desk and click on the Service Requests app. Type in KIT/SPLIT Days to the Category field. Complete the mandatory fields and click Save and Close to submit	2) Payroll receive notification and records KIT/SPLIT days on system

Supporting Information

[P&M User Guide - How to raise and maintain a Service Request enquiry user guide](#)

[Guide to Service Requests](#)

Managing Loan Payments and Deductions

This process covers the processing and management of elements that relate to loan payments and deductions. This circumstance usually occurs when the University advances money in the form of a loan to the employee for a specific purpose, this section covers the process for loan applications for eligible current or prospective members of staff who wish to apply for an interest free loan to cover their visa/indefinite leave to remain fees and associated costs or a Transport Loan. Visa Reimbursements are also covered below.

Immigration Fees - Interest Free Loan

Please note that Pending Workers and Employees can apply for a loan. Please read the information on the [Immigration Fee Assistance](#) webpages for further details and eligibility criteria.

Pending Workers (those who have not started employment) will have the loan processed via Accounts Payable, employees will be processed by payroll.

Note that for pending workers requiring a new out of country skilled worker visa this process usually commences during the recruitment and onboarding process and a Journey and tasks relating to the loan will be allocated to those who are applying for sponsorship. Further information on this process is available within the [Guide to Recruitment and Onboarding](#).

Employee or Pending Worker	HR Operations	Finance Helpline	Finance Business Partner	Finance Accounts Payable (AP)	Payroll
1) Completes the Immigration Fees Loan Request Form and emails this to HR Helpline. Note associated guidance titled ' Immigration Fees	2) HR Ops will check if the applicant is eligible and if all the information required is attached. If the form does not have the required information, HR Ops will contact the	5a) Assign Uni Desk Call to Finance Business Partner (Pending Workers Only)	5b) Processes loan payment in People & Money, note requires Finance Business Partners Line Manager for approval. (Pending Workers Only)	5c) Once approved by FBP, AP make payment in line with internal procedures and payment runs. 5d) Once loan has been processed, send	6) Update the employee's Payroll record (Element entries) to make a one-off loan payment and set up loan recovery to

Loan Request Form Guidance Notes is available to support applicants.	person to request additional information or if the person is not eligible, HR Ops will contact them to confirm this. 3) Add the salary costing and approval information to the form 4a) If the applicant is a current employee send an SR to Payroll, attaching the completed form and any relevant attachments. 4b) If the applicant is a pending worker send the form to finance.help@ed.ac.uk with "FAO Accounts Payable - Visa Loan Payment" in the subject header. The application form and approvals should be attached AND send an SR to payroll with "Pending Worker Visa Loan" in the heading to confirm that the			confirmation to Payroll once processed via UniDesk.	commence the following month (1st of the month after the loan payment made. If loan paid via AP for a pending worker set up loan recovery to commence once employee record is available. 7) Mark SR from HR Ops as Resolved. or Close Uni desk call from AP.
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	request has been sent to Accounts Payable to make payment and confirm that Payroll need to set up the repayments from the date the applicant becomes an employee.				
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Reimbursement of Immigration Fees

Current employees can claim reimbursement of the costs for an application to an eligible visa route. Please read the information on the [Immigration Fee Assistance](#) webpages for further details and eligibility criteria.

Employee	SDA/LM	HR Operations	Payroll
1) Completes the Immigration Fee Reimbursement Request Form submits this to their Line Manager or local School/Department Administrator. Note the Immigration Fee Reimbursement Guidance Notes are available to assist applicants and SDA's/Line Managers	2) Reviews form and adds salary costing details and seeks approval from the Director of Professional Services/ Support Group Head of Department or equivalent. 3) Submits the form to HR Operations by raising a Service Request > Visa Reimbursement	4) HR Ops will check if the applicant is eligible and if all the information required is attached. If the form does not have the required information, HR Ops will contact the requestor for additional information or if the person is not eligible, HR Ops will contact them to confirm this. 5) Add approval information to the form 6) Reassign the SR to Payroll, attaching the completed form and any relevant attachments.	7) Complete payroll checks and Update the employee's Payroll Record to arrange for the reimbursement to be processed (Non Recurring payment). 8) Mark SR from HR Ops as Resolved.

Transport Loans

Information, terms and conditions, eligibility criteria and relevant links can be found on the [Interest free Transport loan](#) page on the Finance Specialist Services SharePoint site. Please note, the process can also be followed to apply for an [Interest Free Bike Loan](#).

Role	Employee	Payroll Team
Process	1) The employee sends in the travel loan application form to Payroll Services via the using the Transport Loan application form 6) Employee receives notification that loan has been processed 7) Receives the travel loan funds on in their pay, the month following their successful application 8) Employee buys ticket / Pass / Bike 9) Submits receipt to evidence proof of purchase via the Transport Loan application form	2) Check for qualification criteria - Criteria is the employee must have at least 3 month's service and at least a year to go if a Fixed Term Contract employee. The loan also can't be more than 10% of the employee's salary. Payroll will also check if the employee already has existing loans and take the outstanding amount into consideration in the criteria checks (to ensure no combined loan amounts exceed £10k) 3) If meet criteria then agree load and add loan payment to employee's payroll record (one off payment). Employee receives loan payment in next pay run. If employee doesn't meet criteria– payroll notify the employee explaining why and close the Transport Loan application form 4) Set up recovery payments from following month 5) Close Transport Loan application form and notify employee 10) Payroll check proof of purchase has been received via Transport Loan application form within 30 days have been received and updates Receipt Submitted field to yes. 11) If no proof of purchase received, follow up with employee and if there is no reasonable explanation the full loan amount will be recovered in following pay period 12) Once proof of purchase has been received the Transport Loan application form is closed.

Supporting Information

[Interest Free Transport Loans](#)

[Transport Loan Guidance and Checklist](#)

[Transport Loan application form](#)

Maintaining Tax Information

The processes involved in ensuring employees pay the correct tax.

Payroll are responsible for ensuring employee's Payroll records are set up correctly with the correct tax code and basis. The Tax team are responsible for applying for S690's the University requires e.g., for any non-resident employee that undertakes work in the UK occasionally, P11D submissions and ensuring any employee impacted by acting as 'Flying Faculty' is identified and the correct tax paid.

Flying Faculty describes the situation where an employee is sent to a non-UK country to carry out University work, e.g., deliver a programme at a University the UoE collaborates with. As a result, a tax liability is paid to the tax authority in the country the employee has been working in.

P11D submissions are required where an employee has received expenses and / or benefits which are taxable, including: Living accommodation; Private medical insurance (but not annual check-up / screening); other benefits employee has directly received; Travel. This is currently an offline process.

Role	Employee	Tax Team	Payroll	External Advisor
Process - P45	1) Completes 'Provide your tax information for HMRC' or 'Do you still need to provide your tax information to HMRC?' task on People and Money		2) Payroll receive report indicating Employee has uploaded a P45/New Starter Checklist 3) Access Statutory deductions calculation card 4) Update employee record with tax details from the P45. E.g., tax code, previous taxable pay and tax paid figures	

Process - S690		1) Tax team apply to HMRC for S690 (offline)	2) Payroll team receive S690 from HMRC and make manual adjustment accordingly 3) Payroll check if any obligations to country of domicile (offline) 4) If yes, then hand over to non-UK payroll (either the contracted Bureau – currently Active Pay or seek advice from External Advisor) 5) Run QuickPay to check adjustment	
Process – Flying Faculty		1) Tax team send Payroll team a monthly report to identify all employees impacted by acting as Flying Faculty (offline) 3) Send Passport stamps and pay slips to External Tax Advisors of relevant countries (offline) 6) Tax team instruct School/Dept to pay External Tax Advisor (offline) 10) When the country credits the UoE account, the Tax Team will identify the payment and inform Payroll	2) Send tax payslips of affected staff to Tax Team (offline) 7) The External Advisor is paid the amount of the tax liability to enable them to pay the applicable country (offline) 11) Payroll recover offset amount via costing to the School/ Dept 12) Inform school costing recovery made (offline) Reimburse the school with the amount of tax reduction (offline)	4) External Advisor calculates local tax liability on behalf of UoE (offline) 5) External advisor sends calculation to Tax Team (offline) 8) External advisor pays tax amount to the specific country's tax authority (offline) 9) The Local Country Tax Authority credits the UoE account (offline)

Process – Create P11D	The production of P11Ds is currently an off-line process. Please speak to payroll manager for further details
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Pensions Automatic and Contractual Enrolment

In line with UK legislation all staff are automatically enrolled into a workplace pension providing they meet auto enrolment criteria. The Pensions Team are responsible for letting staff know that they have been auto enrolled as well as ensuring that membership records have been accurately set up in the appropriate pension scheme.

Information on auto enrolment and re-enrolment and other information on pension schemes, joining and leaving a scheme and retirement can be found on the [Pensions webpages](#)

The process of enrolling staff into a pension scheme, both automatic and contractual enrolment includes:

- Automatic enrolment to the appropriate UoE pension scheme
- Postponement for casual workers (in line with [Conditions of Service](#) for casual workers)
- The contractual enrolment of staff on grades UE06 – UE10 (excluding Guaranteed Hours Contracts) and other grades listed on the Appendix to USS; and EU press and Edinburgh Innovations staff to Scottish Widows.

This process takes place as part of the payroll cycle. The process runs and undertakes an initial calculation of earnings.

Auto enrolment reports are run every month following the completion of the dummy payroll run, usually around the 19th/20th of each month (to ensure letters are sent before pay slips are issued)

Overpayments

The [Payroll Policy](#) outlines the University's position on reclaiming overpayments.

Recovering overpayments made in error due to records not being updated or Payroll not being informed at the time, so money needs to be recouped from the employee / ex-employee. This may be due to

- Late Change of hours impacting on current pay.
- Leavers that have been paid
- Incorrect adjustments made previously
- Allowances not ended on time
- GH/Overtime that should not have been paid

- Non-starters and Payroll not informed
- Post payroll checks identifying payment issues
- Line Manager/budget holder monitoring ledger/payroll MI.

Any errors identified prior to BACS cut-off would be recalled, thus avoiding overpayment. Correct payment would be issued (advance process).

Role	Employee/LM/HR Operations	Payroll Team	HR Operations
Process	1) Contact Payroll to notify them that overpayment has been made. 6) Employee notified of reason for overpayment and process for recovery. 8) Employee receives letter. 9) Employee may volunteer to make one off payment.	1) Payroll may identify overpayment if an adjustment had previously been made incorrectly. 2) Check if the person is a current employee. 3) Make correction to Employee record - Incorrect non-recurring element entries can be corrected by Payroll but assignment updates / corrections to contractual allowances would need to be made by HR Operations. 4) Assess impact on pay. 5) Assess material impact. I.e., if recovering the full amount in a month would reduce the employees' pay too greatly or result in £0 pay or negative pay. If not, the overpayment will be recouped in the current month's pay. 6) Notify the employee to inform them of how the overpayment occurred and how it will be recovered, i.e., in a single recovery in the current month. 7) Write to employee to notify them of the repayment plan (giving sufficient time). 9) Enter the repayment elements on EE record. The repayment element(s) will be applied to the employee's assignment that the overpayment was made against, to recover the overpayment across the number of months agreed. The overpayment will	3) Payroll notify HR Operations via SR if updates / corrections needed to contractual allowances. 10) Payroll notifies HR Operations via SR if person is no longer an employee (to update employee record with leaving date).

		not be taken from a different assignment due to pensions implications 10) Contact HR to correct the record with a leaving date if the person has left the University. 11) A letter is issued to the person that received the overpayment (not a current employee) to inform them of the overpayment details. The letter will include bank details for the person to repay the money to UoE or subsidiary. Payroll will save / upload a copy of the letter to SharePoint (employee file). 12) If Payroll identifies that the money has been received, the relevant Payroll control account will be reconciled to ensure the overpayment is no longer marked as outstanding.	
Supporting Information Missed, Late or Overpaid Payments			

Advance payments

This step outlines how to process an advance payment for employees that have missed the payroll run, e.g., late contracts so the employee should not have to wait until the next month to receive funds. This would apply where an employee is underpaid or missed payroll. The decision can be made to advance the employee the amount. An estimated net amount is calculated (to consider pension, PAYE and NI deductions). Adjustments are entered into the following pay period to correct payroll record and advance recovered.

Payroll will decide whether to support the request and pay the employee or not support the claim, e.g., where the claim is for a small number of hours or overtime and not putting the employee in significant financial hardship, they may not process an advance payment. If the request is supported, Payroll calculates an estimated amount (circa 61%) that the employee would receive to take into account PAYE, NI and Pension Contributions.

The employees' Pension, Tax and NI figures will be adjusted in the following months main Payroll run.

If it is decided to support the request, the Payroll Manager will then decide if immediate action is required (i.e., faster payment by CHAPS) or if it is acceptable to pay the employee in the Advance Payment Run (approx. 1 week after the main Payroll run). Where immediate action is not required the employee will receive the out-of-cycle payment as part of the Advance Payroll Run.

The intention is not to use this Advance Run for late starters as the individuals should be communicated with upon commencement of employment when they can expect to receive their 1st salary payment but there are likely to be occasional exceptions agreed. Employees who start their employment after the payroll cut-off (16th of the month) will receive their first payment on pay day of the following month.

If it is decided that immediate action is required, and a faster payment is to be arranged Payroll will create an entry on the Bankline system for the calculated advance payment to be made to the employee.

Two levels of authorisations are required for payments made via Bankline, therefore, Payroll will contact the relevant Directorates/Departments by email to obtain the necessary approvals.

Role	Employee/ LM or SDA	Payroll Team	Payroll Manager	Finance Operations (Cash Office)
Process	1) The employee, their Line Manager or SDA notify Payroll via Service request (or phone call or email) that the employee has been underpaid or missed the current Payroll run 5) The employee receives confirmation via SR that they will not receive an advance payment and any arrears / corrections will take place in the next pay period.	2) Request for advance payment received 3) Payroll decides whether to support the request 4) Payroll notifies the employee of their decision, via SR if the request has been declined 7) Payroll calculate and process the estimated amount 8) Create Bankline payment 9) Handover to Finance Ops (Cash Office) to process payment. Payroll will notify the Finance Ops (Cash Office) that a Bankline payment has been created and will attach the necessary approvals so the faster payment can be	6) The Payroll Manager will decide whether immediate action is required	10) Finance Ops (Cash Office) will release the faster payment to pay the employee as swiftly as possible

		released to ensure the employee receives the funds as quickly as possible 11) The employees Payroll record is updated with the recovery amount and corrected so that in the next Payroll run, their Payroll record is updated accurately with the correct amount of Pension, Tax and NI for both the advance payment and the following month's main Payroll run		
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Leavers

The [Guide to Employee Separation](#) process outlines the steps prior to Payroll involvement. Employees should contact the Pensions Team at least three months in advance if they are [retiring](#).

This section includes how to process an organizational leaver or a leaver of one or more assignments. This includes processing outstanding holidays pay entitlement, overpayment recovery, loan recovery and maintenance and the notification of applicable leavers to external salary sacrifice providers.

When a Death in Service occurs, this will be processed in a way that ensures no overpayments or residual annual leave are automatically recovered.

Role	Payroll	Employee	Line Manager	External provider
Leavers	1) Use the leaver report to check reason for leaving. For a Death in Service, follow specific process outlined below. 2) Are there any salary sacrifice elements? e.g., CCV, Cycle to Work, electric vehicle. 3) Notify Provider of leavers with salary sacrifice elements 5) Check if there are any loans or overpayment recoveries 6) Run QuickPay to assess impact of recovering the outstanding monies due versus their final salary and other monies owed to them	1) As per the Annual Leave Policy, employees must take all leave entitlement before their last day of service in their role. Upon termination, annual leave entitlement will be pro-rated based on your termination date. Any underused holidays will be		4) Provider notified of leavers with salary sacrifice elements

	7) Use quick pay results to determine if recovery can be applied as one repayment 8) If required, may move to overpayment and employee notified to agree payment plan 10) Roll back QuickPay 11) If the leaver reason code is 'TUPE transfer' Payroll Team must make a manual adjustment to ensure the employee does not receive payment/deductions for any untaken/overtaken annual leave. Annual leave balance is transferred with them. Any annual leave payments or deductions must be offset for TUPE Transfers			
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Employee Leaving one or more of their Multiple Assignments Process	1) Use the leaver report to check if the employee is leaving all assignments 2) Do they have any salary sacrifices or loans on any assignments? 3) Move loan and / or salary sacrifice to remaining assignment. 4) If a Service Request is received from the Line Manager advising of untaken accrued annual leave or advising that employee has used more than their accrued annual leave entitlement, make the necessary adjustment to the employees final salary in the role.	1) As per the Annual Leave Policy, employees must take all leave entitlement before their last day of service in their role.	1) If, for operational reasons, employees are unable to take all of their accrued leave entitlement prior to their last day of service in the role, Line Managers should raise a Service Request using the Category 'Pay Enquiries – General' confirming how many hours annual leave should be paid to the employee for the post that they are leaving. Payroll will process the necessary payment of annual leave in the employee's final salary for this role. If an employee has used more than their accrued annual leave entitlement prior to their last day of service in the role, Line Managers should also raise a Service Request using the Category 'Pay Enquiries – General' to confirm how many hours annual leave have been overused. Payroll will then make the necessary adjustments e.g. pay deduction, to the employee's final salary for this role. Annual leave entitlement cannot	
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			be transferred from one assignment to another where an employee holds multiple assignments and one comes to an end. Once an employee's termination has been processed, Line Managers can review the employee's pro-rated balance via My Team > Absence Balance.	
Death in Service	1) Check the leavers report for any leavers with a Death in Service reason code 2) Have they overtaken Annual leave e.g., number of holidays taken versus their entitlement? 3) If so, make adjustment to ensure overpayment not recovered via element entry screen 4) Did they have any salary sacrifice? E.g., Childcare vouchers, cycle to work, electric vehicle 5) Notify Provider 7) Is there an outstanding loan			6) If the employee had any salary sacrifice elements, the provider is informed that the employee has passed away and therefore are a leaver of the scheme

	balance? 8) Make a Payroll adjustment to offset loan 5) 9) No payment will be made until deceased estate gets in contact with us			
Supporting Information Guide to Employment Separation Missed, Late or Overpaid Payments				

Generate Payslips

Payslips (from April 2022 onwards) will be available to view in the payroll app on People and Money.

Role	Payroll Team	Leavers/ LMs/ SDAs	HR Operations
Process	Payslips are generated by the Payroll Team which produces a payslip for all employees available in the Payroll app. The same process also generates paper pay slips for Casual Workers and Pensioners. The Name and Address will appear on the front of the payslip to enable it to be posted to the employee's home address.	Line Managers/ SDAs should remind all leavers to ensure their home address is up to date to ensure safe receipt of their last payslip	Leavers will need to have their delivery preference updated to 'online and paper' by HR Operations as part of their process.

P45 Process

P45's are issued to all leavers and they show how much tax a person has paid on their salary so far in the tax year (6 April to 5 April). Leavers will receive their P45 shortly after they receive their final payment from the University.

Role	Payroll Team	Leavers/ LMs/ SDAs	HR Operations
Process	P45s are generated by the Payroll Team and are paper based. The Name and Address will appear on the front of the P45 to enable it to be posted to the employee's home address	Line Managers/ SDAs should remind all leavers to ensure their home address is up to date on People and Money to ensure safe receipt of their P45.	Leavers will need to have their delivery preference updated to 'online and paper' by HR Operations as part of their process and should be added into their Leavers Checklist.

Salary Costing Changes

Salary costing changes will be maintained by Payroll Services. Salary costing changes can be as a result of many factors such as (but not limited to):

- Salary codes entered at recruitment stage were incorrect or were only for a temporary period of time.
- Grant/project comes to an end but employment continues on another funding source.
- Employee goes on sick or maternity leave and salary costs must be paid from alternative source.
- Percentage split requires changing due to amount of time employee spends on specific projects/grants.

From the launch of Payroll functionality in People and Money, all salary costings must use the [Chart of Accounts](#).

A Line Manager or SDA can view the costing details for an employee within **My Client Groups > Show More > Costing Per Person**.

If the costing requires updating, Line Managers or SDAs complete the [Charging of Salaries form \(Form 13\)](#). Obtain offline approval for the salary costing change in line with the guidance on the form and [Employment and Finance Approvals Guidance](#).

The completed [Form 13](#) should be sent via a Service Request using the **Salary Costing Change** category by the 10th of the month, which will route to Payroll Services for processing. For further guidance, please watch the [How to submit a Charging of Staff Salary Changes Form \(form 13\) demo video](#) and see the [Guide to Job Changes](#) process user guide.

Managing Research Salary Costs

If costs related the assignment are to be charged in part or total to cost centre 30010003 (research salary control account) a research salary management labour schedule may need to be created or amended. Please liaise with your school research administration team to provide this information if required. For further information on staff costs on projects, please see the [Research Finances SharePoint](#).

Research Finance Administrators can find more information and guidance on the User Guides page of the [Finance Development Hub](#).

Appendices

Appendix 1 – Pro-ration

The following table explains how pro-ration works in People and Money.

Full-time Employee	• Proration is based on monthly pay, working hours available in the month and hours worked • Employee works Mon to Fri 7 hours per day, 35 hours per week. Their salary increases from £18k to £20K from 15 April 2021. • There are 22 working days in April, working hours for the month are $22 \times 7 = 154$ • 10 days are due for FTE of £18k = $10 \times 7 = 70$ Hours • 12 days are due for FTE of £20k = $12 \times 7 = 84$ Hours • Salary for April: $18000 / 12 / 154 \times 70 = £681.82$ • $20000 / 12 / 154 \times 84 = £909.09$ • Total due = £1590.91	◀ April 2021 ▶ <table><tr><th>MO</th><th>TU</th><th>WE</th><th>TH</th><th>FR</th><th>SA</th><th>SU</th></tr><tr><td>29</td><td>30</td><td>31</td><td>1</td><td>2</td><td>3</td><td>4</td></tr><tr><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td></tr><tr><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr><tr><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td></tr><tr><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td></td><td></td></tr></table>	MO	TU	WE	TH	FR	SA	SU	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30		
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Part Time Employee	For part time employees the FTE salary is used to calculate the annual salary Proration calculation uses hours, the same as the full-time example Employee works Mon to Wed 5 hours per day, 15 hours per week. Their salary increases from £18k to £20K from the 14th of April 2021 Part time annual salary: $18000 / 35 \times 15 = 7714.29$ p.a. $20000 / 35 \times 15 = 8571.43$ p.a. There are 12 working days in April, working hours for the month are $12 \times 5 = 60$ 5 days are due for FTE of £18k = $5 \times 5 = 25$ Hours 7 days are due for FTE of £20k = $7 \times 5 = 35$ Hours Salary for April: $18000 / 35 \times 15 / 12 / 60 \times 25 =$ £267.86 $20000 / 35 \times 15 / 12 / 60 \times 35 =$ £416.67 Total due = £684.53	◀ April 2021 ▶ <table><tr><th>MO</th><th>TU</th><th>WE</th><th>TH</th><th>FR</th><th>SA</th><th>SU</th></tr><tr><td>29</td><td>30</td><td>31</td><td>1</td><td>2</td><td>3</td><td>4</td></tr><tr><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td></tr><tr><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr><tr><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td></tr><tr><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td></td><td></td></tr></table>	MO	TU	WE	TH	FR	SA	SU	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30		
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Calculating daily rate	Salary & allowances are paid as normal and displayed on payslip Occupational pay is calculated using the employees work schedule Statutory payments are calculated using calendar days The daily rate for salary is offset against the daily rate of the statutory payment Occupational and statutory payments are added together and offset Absence details: Start Date of Absence: 01/01/2021 End Date of Absence: 31/12/2021 Option 1: 18 wks full pay, 21 wks. SMP; Unpaid AWE: £614.10, 90% = £552.69 p.w. Work Schedule = M-F 7 h.p.d Working hours in month (Jan 21) = 147 hours (21 days x 7 h.p.d) Calendar days in month (Jan 21) = 31 days Salary £35,845.00 Daily Rate Calculation: Monthly salary / working hours in the month / daily hours $2987.08 / 147 \times 7 = 142.24$ SMP Daily Rate Calculation: Weekly rate / days in a week	
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	$552.69 / 7 = 78.955$ (the daily rate will differ by 1p where the rate does not divide equally, however the overall result is correct) $78.96 \times 31 = 2447.63$ OMP Daily Rate Calculation: Monthly salary / working hours in the month / daily hours – SMP daily rate $2987.08 / 147 \times 7 = 142.24 - 78.95 = 63.29$ (the daily rate will differ by 1p where the rate does not divide equally, however the overall result is correct) $63.29 / 7 \times 147 = 1328.96$ (rounded down to match system result) Maternity Offset Calculation: OMP + SMP $1328.96 + 2447.63 = 3776.59$	
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