



People and Money system

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

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.

Premium Band Payment Allowance (if applicable) must be added to the **Compensation section**. All other allowances that are to be paid from hire date must be requested within the Request Contract Task. This task must be completed within Journeys to allow for the contract to be generated by HR Operations. The Journey will be available once the Pending Worker has been submitted and approved.

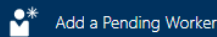
If the person you are hiring has an active casual worker assignment you must contact HR Operations to have the termination date brought forward by raising a service request, including the hire date. Please review the details in the [Guide to Casual Workers](#) (Under Recruitment & Onboarding heading)

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**



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**.

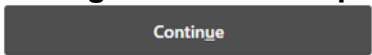
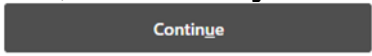
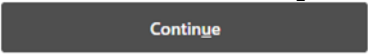
12. In the **Additional Assignment Info** section, select the dropdown and add Guaranteed Hours or Annualised/Fractional contract information as required, then click **Continue**.

Continue

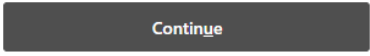
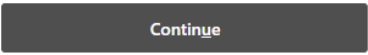
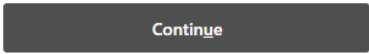
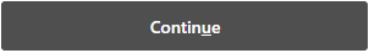
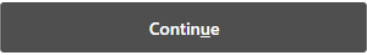
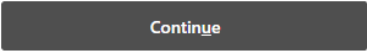
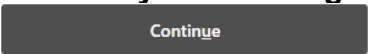
13. In the **Maintain Managers** section, **Add** or **Edit** the line manager of the new hire as needed, then select **Continue**

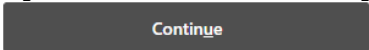
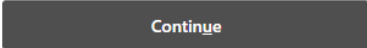
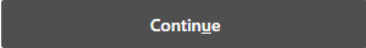
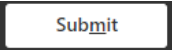
+ Add

Continue

14. In the **Payroll Details** section, select UoE Group in the **Payroll Frequency** section then select **University of Edinburgh** as the **Tax Reporting Unit**. Then select **Continue** 
15. In the **Salary** section, use the **Salary Basis** dropdown to select **Annual Salary** then select **Continue** 
16. Complete the **Compensation** section should any **Premium Band** allowance payment be required and click **Continue** 
17. Add any comments and upload the completed Job Requisition Business Case form to the **Comments and Attachments** section then click **Submit** 

Rehire a previous employee

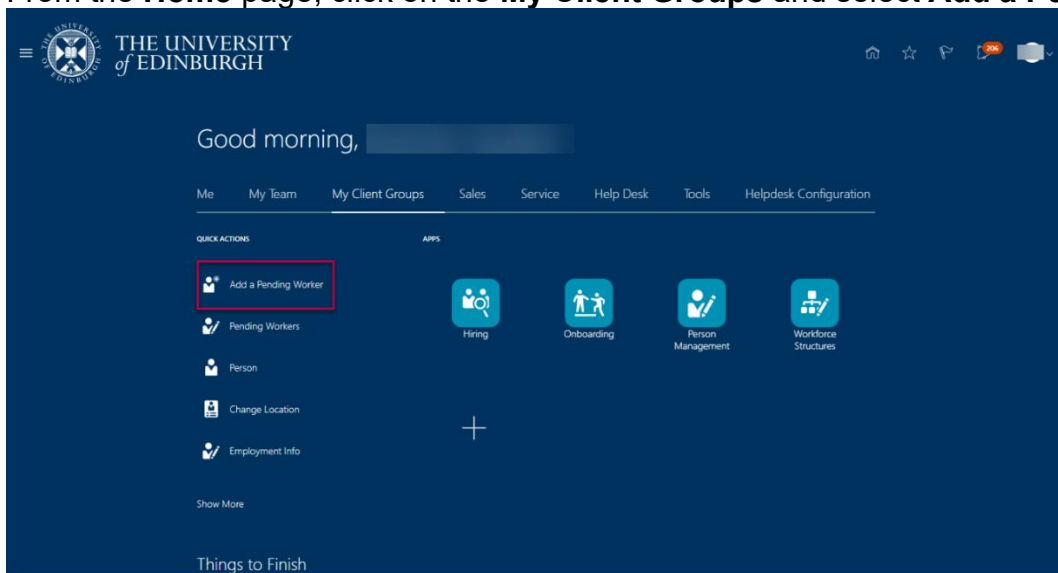
1. Select the previous worker record and click **Continue** 
2. Click **OK** 
3. **Check the boxes** against all the info you would like to manage and then press **Continue** 
4. Complete the **When and Why** section and click **Continue** 
5. Confirm the **personal details** are correct then click **Continue** 
6. Add or amend **Communication Info** as required then click **Continue** 
7. Add or amend **Address** details as required then click **Continue** 
8. Add or amend **Citizenship Info** as required then click **Continue** 
9. In the **Employment Details** section complete the mandatory fields (detailed below), add the **Personal Job Title**, fill in all other relevant information as required for the contract. For fixed term workers only, ensure the **Projected End Date** is completed. Please include the **default expense account code** details. Click **Continue**.
10. In the **Additional Assignment Info** section, select the dropdown and add Guaranteed Hours or Annualised/Fractional contract information as required, then click **Continue** 
11. In the **Maintain Managers** section, **Add**  or **Edit**  the line manager of the new hire as needed, then select **Continue** 
12. Click **Continue**  in the Work Relationship Info section
13. In the **Payroll Details** section, select UoE Group in the **Payroll Frequency** section then select **University of Edinburgh** as the **Tax Reporting Unit**. then select **Continue** 

14. In the **Salary** section, use the **Salary Basis** dropdown to select Annual Salary then select **Continue** 
15. Complete the Compensation section should any Premium Band allowance payment be required and select **Continue** 
16. If required, **Add Direct Reports** by searching and selecting existing employees to report into the new hire then select **Continue** 
17. Add any comments and upload the completed Job Requisition Business Case form and New Appointee Information Form to the **Comments and Attachments** section then click **Submit** 

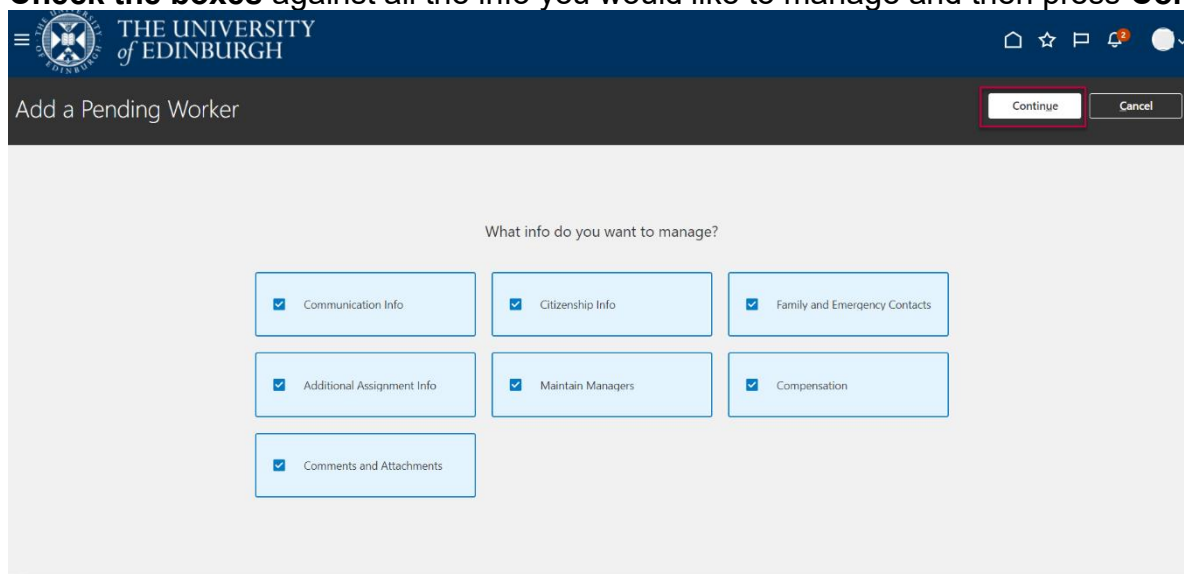
In Detail...

Add Pending Worker

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

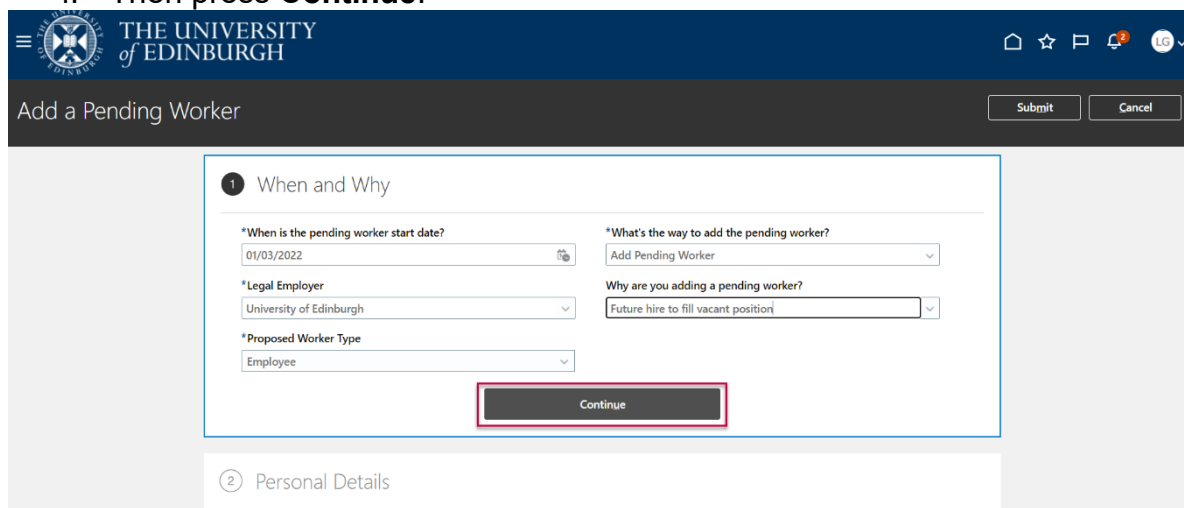


2. **Check the boxes** against all the info you would like to manage and then press **Continue**.



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

- 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	HESA Disability 1
Student Number 	HESA Disability 2
UOE_MORAY_HOUSE_TERMS 	HESA previous institution
STSS/GTC number 	REF Unit of Assessment
HESA Staff Identifier 	HESA Highest Qualification
UOE_UUN 	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 	REF Unit of Assessment
HESA Staff Identifier 	HESA Highest Qualification
UOE_UUN 	HESA previous employment
National Identifiers *Country United Kingdom *National ID Type National Insurance Number *National ID MS763645 Issue Date dd/mm/yyyy Expiration Date dd/mm/yyyy Place of Issue + Add	

☒ 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

If one of these people is the person you're adding, select the person. Else select no match. (PER-1332260)

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

If one of these people is the person you're adding, select the person. Else select no match. (PER-1332260)

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

Personal Job Title
Administrator (B) (PAO - Administration)
Termination Date

Date of Birth
1/03/1987
Location
1-7 George Square
Work Email
jimmyj@yahoo.com
Country
United Kingdom

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.**

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-1332260)

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	Personal Job Title Administrator (B) (PAO - Administration) Termination Date Date of Birth 1/03/1987 Location 1-7 George Square Work Email greggaye@yahoo.com Country United Kingdom
--	--

[Continue]

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

*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

3 Communication Info

4 Addresses

5 Citizenship Info

6 Family and Emergency Contacts

Relationship
Select a value

Contact Type
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 it should be overwritten for a meaningful job title . This will also impact on correspondence e.g. contracts
Grade Ladder*	Ensure you complete the Grade Ladder and Grade details to automatically pull the salary through into the Salary details. For the university grade ladder use UE07 for Grade 7. Off-scale salary codes end in an N i.e. UE7N.
Grade*	As above
Step	Grade Step
Department	Select the relevant department
Location*	Location where employee will be based
Worker Category	Select the relevant worker category e.g Guaranteed Hours
100% Off campus working	Yes or No - Only to be updated to 'Yes' where it has been agreed that the employee will work 100% of time off campus as per the flexible working policy.
Assignment Category*	Select the appropriate from the dropdown, e.g open ended, fixed term
Working Hours	Defaults to 35 per week but can be amended, must be a weekly figure.

	For Guaranteed Hours assignments set the working hours to 0 per week to calculate a 0 FTE, and use the additional assignment information in a later section to record the details.
FTE	Automatically populates based on Working Hours
Working as a Manager	Yes/No
Fixed Term Reason Code	Must be provided for fixed term contracts.
NHS Honorary Contract	If applicable
Contract review Date	If applicable
Research/Teaching&Research/ Teaching only*	1 - Academic Contract that is teaching only (applies only to contracts indicating that staff are teaching only. Teaching should include all related activities such as tutoring and preparation). 2 - Academic Contract that is research only (should be used for those contracts where the primary academic employment function is research only, even though the contract may include a limited number of hours teaching (up to 6 hours per week or pro-rata for part-time staff)). 3 - Academic contract that is both teaching and research (applies to contracts that include 6 or more hours of teaching per week (averaged over the number of actual teaching weeks) as a minimum (pro-rata for part-time staff) and the remaining contract hours as research only). 4 - Non academic contract 9 - Academic Contract that is neither teaching nor research (should be used for academic contracts where the primary employment function is not teaching and/or research). If a contract is for both academic and non-academic work then the appropriate code from 1 to 3 should only be used where the primary employment function is teaching and/or research.
HESA Activity Standard Occupational Classification*	HESA Activity Standard Occupational Classification-select the appropriate option. For subsidiaries please select the code which matches closest the type of role. For subsidiaries this information will not be returned as part of the HESA submission For HESA Standard Occupational Classification information view this link Staff 2023/24 - Activity Standard Occupational Classification HESA
HESA Level*	This is now a mandatory field, please use the table below to select the appropriate HESA level according to the grade of the position being offered. Note staff in subsidiaries should use 'XperthR Level N' in all instances
Clinical Increment Date	If applicable
Off Campus Working Days (Approved Flexible Working Only).	If a Flexible Working arrangement agreed (as per the Flexible Working Policy) please enter the days of the week the employee will be working off campus, e.g. Monday and Friday every week. If they will be working set days off campus over a different pattern to weekly (e.g fortnightly) please provide the details in this section (e.g. every other Friday from home). Note - It is important to provide this information here as this will provide HR Operations with the details required for the contract when it is requested. This field has a 150 character limit.

Default Expense Account Code*	Must be added – please refer to the approved Job Requisition Business Case Form. Please note in most circumstances the default expense account code will be the same as the salary costing code. The default expense code cannot be split.
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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 Academic staff	
F2	UCEA level 5B	UE10 / OTHS Non-Academic 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
Cost Centre	From the JRBC Form
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

Spare 02 No Spare

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)

Guaranteed Hours

+ 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 a web form titled "Add a Pending Worker" with a dark header bar containing "Submit" and "Cancel" buttons. The main content area is a light gray box. Inside, a blue-bordered panel titled "8 Additional Assignment Info" contains a dropdown menu labeled "Info Group" with "Annualised/Fractional information" selected. Below this, the text "Annualised/Fractional information" is displayed. A large orange-bordered box contains the following fields:

- *HOURS_TO_BE_WORKED_SCHEDULED (text input)
- Number of Hours per week (text input)
- Annual Leave Hours (text input)
- Percentage for annual leave (text input)
- ANNIVERSARY_START_DATE (date input, format dd/mm/yyyy)
- Total Annualised Hours per Annum (text input)
- End Date (date input, format dd/mm/yyyy)
- Average Annualised Weekly Hours (text input)
- Number of Weeks Per Year (text input)
- Fractional Period (dropdown menu)

At the top right of the orange box are "OK" and "Cancel" buttons. At the bottom of the orange box is a "Continue" button. Below the orange box, the text "9 Maintain Managers" is visible.

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**

+ Add

GS Gretchen Sanders
Business School Administrator Line Manager

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 Salary Basis

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 Premium Band allowance payment is required. All other Allowances to be paid from hire date must be included within the Request Contract task within Journeys.

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

To add a Premium Band allowance, select **Add**.

Add a Pending Worker Submit Cancel

9 Maintain Managers Edit

10 Payroll Details Edit

11 Salary Edit

12 Compensation

+ Add

 There's nothing here so far.

Continue

13 Comments and Attachments

Select the **Plan and Option** as Premium Band, select the **start date** and tick if **this is ongoing or provide an end date. Add the percentage** (5, 15 or 30%). Pay value can be ignored. Then Click OK

10 Compensation

OK

Cancel

*Plan

Premium Band

*Option

Premium Band

*Start Date

5/07/2026

*Periodicity

Hourly

End Date

5/07/2026

☐ Ongoing

*Percentage

15

Pay Value

[Hide Plan Info](#)

Allowance Description

A Premium Band is applied to employees who are required to be contracted to work hours between 10pm and 6am, or to work hours that vary from week to week. 'Premium band payments' comprise an additional 5%, 15% or 30% of basic pay rate depending on when work is scheduled and how variable the pattern is.

A 5% Premium Band Payment is applied for contractually working: a) any variable 5 out of 7 days per week between 6am and 10pm with variations of no more than 3 hours in start times, or b) fixed days with variable start times that vary by over 3 hours, or c) some hours, but less than 4 per day, worked between 10pm and 6am.

A 15% Premium Band Payment is applied for contractually working: a) any variable 5 out of 7 days per week between 6am and 10pm with variations of more than 3 hours in start times, or b) fixed days within a variable hours shift rota which covers a 24 hour period, or c) any variable 5 out of 7 days per week and working some hours, but less than 4 per day, between 10pm and 6am.

A 30% Premium Band Payment is applied for contractually working: a) a constant night pattern where 4 hours or more per day are worked between 10pm and 6am, or b) any variable 5 out of 7 days per week, working a shift rota of variable hours covering a 24 hour period.

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

Add a Pending Worker

10 Payroll Details Edit

11 Salary Edit

12 Compensation Edit

13 Comments and Attachments

Comments

Attachments

Drag files here or click to add attachment

Submit Cancel

Once approved the onboarding Journey 'Welcome to the University of Edinburgh' will be automatically assigned. It is here that the request contract task will be available for completion.

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**.

Add a Pending Worker

M5763645

☒ Primary

⚠ 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

Personal Job Title
Tutor (CT) (ACAD - Teacher)

Continue

3 Communication Info

4 Addresses

5 Citizenship Info

Submit Cancel

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**.

This screenshot shows a web interface titled "What info do you want to manage?". It features seven checkboxes, each with a blue checkmark, indicating that all information categories are selected for management. The categories are: Communication Info, Citizenship Info, Family and Emergency Contacts, Additional Assignment Info, Maintain Managers, Compensation, and Comments and Attachments. At the top right of the interface are "Continue" and "Cancel" buttons.

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

This screenshot displays the "Create Work Relationship" form, specifically the "1 When and Why" section. The form includes several input fields and dropdown menus. A red circle labeled 'a' points to the "What's the way to create the work relationship?" dropdown, which is set to "Add Pending Worker". A red circle labeled 'b' points to the "Why are you adding a work relationship?" dropdown, which is set to "Future hire to fill vacant position". The "Proposed Worker Type" is set to "Employee". The "When is the work relationship start date?" is set to "12/11/2020", and the "Legal Employer" is "University of Edinburgh". A red box highlights the "Continue" button at the bottom of the section. Below this section are four more steps listed: "2 Personal Details", "3 Communication Info", and "4 Addresses". The form has a "Submit" button at the top right.

- 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**.

DD Create Work Relationship Daffy Duck

1 When and Why Edit

2 Personal Details

Name

Last Name Duck First Name Daffy

Title Mr.

Biographical Info

Continue

3 Communication Info

4 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**.

DD

Create Work Relationship
Daffy Duck

SubmitCancel

1 When and WhyEdit

2 Personal DetailsEdit

3 Communication InfoEdit

PhonesAdd

There's nothing here so far.

EmailsAdd

Home EmailEdit

☒ Work EmailEdit

Continue

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

Create Work Relationship

SubmitCancel

1 When and WhyEdit

2 Personal DetailsEdit

3 Communication InfoEdit

4 AddressesEdit

Add

☒ Home Address

Argyle House
3 Lady Lawson Street
EDINBURGH
EH3 9DR
UNITED KINGDOM

Continue

5 Citizenship Info

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

The screenshot shows the 'Create Work Relationship' form with the 'Citizenship Info' section highlighted. The form has a dark header with a profile icon, the title 'Create Work Relationship', and 'Submit' and 'Cancel' buttons. The main content area has a light gray background. The 'Citizenship Info' section is outlined in blue and contains an 'Add' button (highlighted with a red box), a table of existing citizenship information, and a 'Continue' button (highlighted with a red box).

Nationality	From Date
United Kingdom	1/10/2020

Citizenship Status	To Date
Active	20/02/2024

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 here .
Level*	This is now a mandatory field, please use the table below to select the appropriate Level according to the grade of the position being offered.
Clinical Increment Date	If applicable
Off Campus Working Days (Approved Flexible Working Only).	If a Flexible Working arrangement agreed (as per the Flexible Working Policy) please enter the days of the week the employee will be working off campus, e.g. Monday and Friday every week. If they will be working set days off campus over a different pattern to weekly (e.g fortnightly) please provide the details in this section (e.g. every other Friday from home). Note - It is important to provide this information here as this will provide HR Operations with the details required for the contract when it is requested. This field has a 150 character limit
Default Expense Account Code* (see below for further guidance)	Must be added – please refer to the approved Job Requisition Business Case Form.

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

HESA LEVEL

STAFF LEVEL CODE	STAFF LEVEL DESCRIPTION	GRADES ASSIGNED TO STAFF LEVEL CODE	ADDITIONAL CRITERIA
A0	Vice-Chancellor/Principal /Head of Initiation	Principal only	
B0	UCEA level 2	Vice-Principal/University Secretary	
C1	UCEA level 3A	Report to run by HR to identify this grouping	
C2	UCEA level 3B	College Registrar	
D1	UCEA level 3/4A1	Report to run by HR to identify this grouping	
D2	UCEA level 3/4A2	Report to run by HR to identify this grouping	
D3	UCEA level 3/4A3	Report to run by HR to identify this grouping	
E1	UCEA level 4A	XM1	
E2	UCEA level 4B	Report to run by HR to identify this grouping	
F1	UCEA level 5A	AC4, AM4, ACN4, AMN4, ACT4, AMT4 UE10 / OTHS Academic staff	
F2	UCEA level 5B	UE10 / OTHS Non-Academic staff (e.g. Professional services staff)	
I0	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 + Add ^

Guaranteed Hours

Research Information for PURE

Guaranteed Hours

Annualised/Fractional Information

HESA Clinical (Contract)

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

Create Work Relationship

Submit Cancel

6 Employment Details Edit

7 Additional Assignment Info

Info Group Annualised/Fractional information

Annualised/Fractional information

OK Cancel

*HOURS_TO_BE_WORKED_SCHEDULED Number of Hours per week

Annual Leave Hours Percentage for annual leave

ANNIVERSARY_START_DATE Total Annualised Hours per Annum

dd/mm/yyyy

End Date Average Annualised Weekly Hours

dd/mm/yyyy

Number of Weeks Per Year Fractional Period

Continue

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

Create Work Relationship

Submit Cancel

6 Employment Details Edit

7 Additional Assignment Info Edit

8 Maintain Managers

+ Add

EC Emma Cunningham
Core Systems Training Consultant Line Manager

Continue

9 Work Relationship Info

10 Payroll Details

11 Salary

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**.

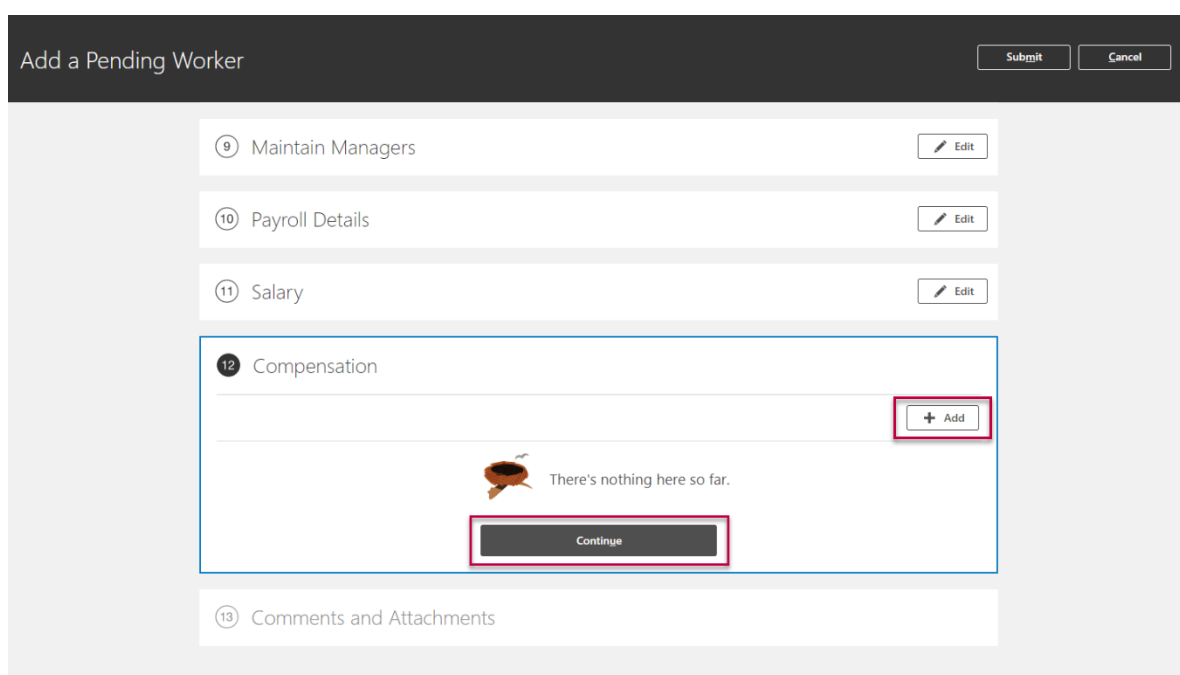
The screenshot shows the 'Create Work Relationship' form with the 'Salary' section (11) highlighted by a red box. The 'Salary Basis' dropdown menu is open, showing 'Annual Salary' as the selected option. The form displays the following information: 'Salary Amount' is 42,793.00 GBP Annually; 'Annual Salary' is 42,793.00 GBP (FTE 1.000000000000); 'Annualized Full-Time Salary' is 42,793.00 GBP; 'New Salary' is 42,793.00 GBP Annually; 'Grade Ladder' is University Grade Ladder; 'Grade Name' is UE08; and 'Grade Step' is UE08 - Step 2. A 'Continue' button is visible at the bottom of the 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 Premium Band allowance payment is required. All other Allowances to be paid from hire date must be included within the Request Contract task within Journeys.

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

To add a Premium Band allowance, select **Add**.



The screenshot shows a web form titled "Add a Pending Worker" with a dark header bar containing "Submit" and "Cancel" buttons. The form is divided into several sections, each with a numbered icon and a title, followed by an "Edit" button. The sections are: 9 Maintain Managers, 10 Payroll Details, 11 Salary, 12 Compensation, and 13 Comments and Attachments. The "Compensation" section (12) is highlighted with a blue border. It contains a text input field, a "+ Add" button (highlighted with a red box), and a message "There's nothing here so far." with a small icon of a campfire. Below the message is a "Continue" button (also highlighted with a red box).

Select the **Plan and Option** as Premium Band, select the **start date** and tick if **this is ongoing or provide an end date**. **Add the percentage** (5, 15 or 30%). Pay value can be ignored. Then Click OK

10 Compensation

OK

Cancel

*Plan

Premium Band

*Option

Premium Band

*Start Date

5/07/2026

*Periodicity

Hourly

End Date

5/07/2026

☐ Ongoing

*Percentage

15

Pay Value

[Hide Plan Info](#)

Allowance Description

A Premium Band is applied to employees who are required to be contracted to work hours between 10pm and 6am, or to work hours that vary from week to week. 'Premium band payments' comprise an additional 5%, 15% or 30% of basic pay rate depending on when work is scheduled and how variable the pattern is.

A 5% Premium Band Payment is applied for contractually working: a) any variable 5 out of 7 days per week between 6am and 10pm with variations of no more than 3 hours in start times, or b) fixed days with variable start times that vary by over 3 hours, or c) some hours, but less than 4 per day, worked between 10pm and 6am.

A 15% Premium Band Payment is applied for contractually working: a) any variable 5 out of 7 days per week between 6am and 10pm with variations of more than 3 hours in start times, or b) fixed days within a variable hours shift rota which covers a 24 hour period, or c) any variable 5 out of 7 days per week and working some hours, but less than 4 per day, between 10pm and 6am.

A 30% Premium Band Payment is applied for contractually working: a) a constant night pattern where 4 hours or more per day are worked between 10pm and 6am, or b) any variable 5 out of 7 days per week, working a shift rota of variable hours covering a 24 hour period.

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

Create Work Relationship

Submit

Cancel

10 Payroll Details

Edit

11 Salary

Edit

12 Compensation

Edit

13 Add Direct Reports

Search for people to add as reports

narayan

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

14 Comments and Attachments

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**.

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

Appendix

Appendix 1

Allowances configured for compensation section - If the allowance you need is not listed include this within the Request Contract task within Journeys.

Premium Band is the only allowance available to select at this stage (wef 13 July 2026).

Appendix 2 Description for Guaranteed Hours Period Hours Cover / Number of Hours Period Field

Each should be used in the following scenarios:

Option	Description	When to use
Over Period of Current GHC Use this for contracts less than a year	Minimum hours to be guaranteed for full duration of GH contract e.g. over the 2-year fixed term contract	- The GH period start and end date and Fixed Term Contract start and projected end date must be the same - You do not need to tick the Annually reviewed

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

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

		Additional Information screen • There is no need to send a GH refresh letter, but you should monitor the actual number of hours worked versus the minimum guarantee. • No refresh letter is required unless the fixed term contract is extended.
--	--	--