



# THE UNIVERSITY *of* EDINBURGH

## System User Guide

# Line Manager/SDA - How to add a Pending Worker System User Guide

We realise this formatting may not be accessible for all – to request this document in an alternative format please email [hrhelpline@ed.ac.uk](mailto:hrhelpline@ed.ac.uk)

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## Introduction

This guide covers key tasks for **Line Managers/School Department Administrators (SDAs)** in the How to Add a Pending Worker system process. A Pending Worker has a person type of Employee and is referred to as a pending worker until their hire date.

Related guidance is linked below:

- [Guide to Recruitment and Onboarding](#)
- [Guide to Casual Workers](#)

The [Appointee Information Form](#) should be completed by the new hire before you start this process.

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

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. Please refer to the approved Job Requisition Business Case Form for the details.

Once you have entered the Assignment details, you can save the pending worker record and return to complete at a later stage (it is not possible to save before this step is complete).

If the pending worker will have **direct reports** you can follow the steps in the [How to change direct reports](#) user guide.

## In Brief

This section is a **simple overview** and should be used as a reminder. More detailed information, screenshots and tips is provided within the 'In Detail' section.

## Add a Pending Worker

1. From the Home page Line Managers should navigate to **My Team, Quick Actions** and select **Add a Pending Worker**.  
Note: If you are a School Department Administrator (SDA) you should navigate to **My Client Groups, Add a Pending Worker**.
2. If relevant, select any **Info to Include**. Then click **Continue**.
3. Complete the **When and Why** section and click **Continue**.
4. Complete the **Personal Details** section including the **National Identifiers (National Insurance Number)** (if known) and click **Continue**.
5. **Duplicate Person Check** - If a duplicate record is found, check the Person Type; Date of Birth; and Termination Date (see [Duplicate Person Check](#) for guidance). Select a match or not as appropriate. Then click **Continue**. **If you select a match this will take you to the [Create Work Relationship screens](#).**
6. Complete the **Communication Info** section. A personal email address must be entered in both the personal email address and work email address field. Click **save and continue**.
7. Complete the Addresses section. Click **save and continue**.
8. Complete the **Citizenship Info** section, adding the nationality of the candidate. Click **save and continue**.
9. Add the **Assignment Details**. You must 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. If relevant, complete the **Additional Assignment Info** section by selecting the dropdown to add Guaranteed Hours or Annualised/Fractional contract information as required. Then click on the **+ icon** then the **pencil icon** to add. Then click **Continue**.
11. In the **Managers** section, **Add** or **Edit** the line manager of the new hire as needed. Then select **Continue**.
12. In the **Payroll Details** section:
  - a. Payroll Frequency – will default to **UOE Group**. Click **Save**.
  - b. Other Info – will default to **University of Edinburgh**. Click **Continue**.
13. In the **Salary** section, use the **Salary Basis** dropdown to select **Annual Salary** then select **Continue**. If the salary is off scale add this.
14. If relevant, complete the **Compensation** section. This should be used for any Premium Band allowance payments that are required. Click **Continue**.
15. Add any comments and upload the completed **Job Requisition Business Case form** to the **Comments and Attachments** section, then click **Submit**.

## Create Work Relationship (Rehire a Previous Employee)

1. If you have a match, select the previous worker record and click **Continue (as per the duplicate check above)**.
2. Click **OK**.
3. If relevant, select any **Info to Include** if you would like to view, edit or manage and then click **Continue**. You must select **Email Details and Comments and Attachments**. You should also select **Managers** to add or amend the line manager, if not selected it will default to the person creating the record.
4. Complete the **When and Why** section and click **Continue**.
5. View **Names** (cannot edit) and click **Continue**.

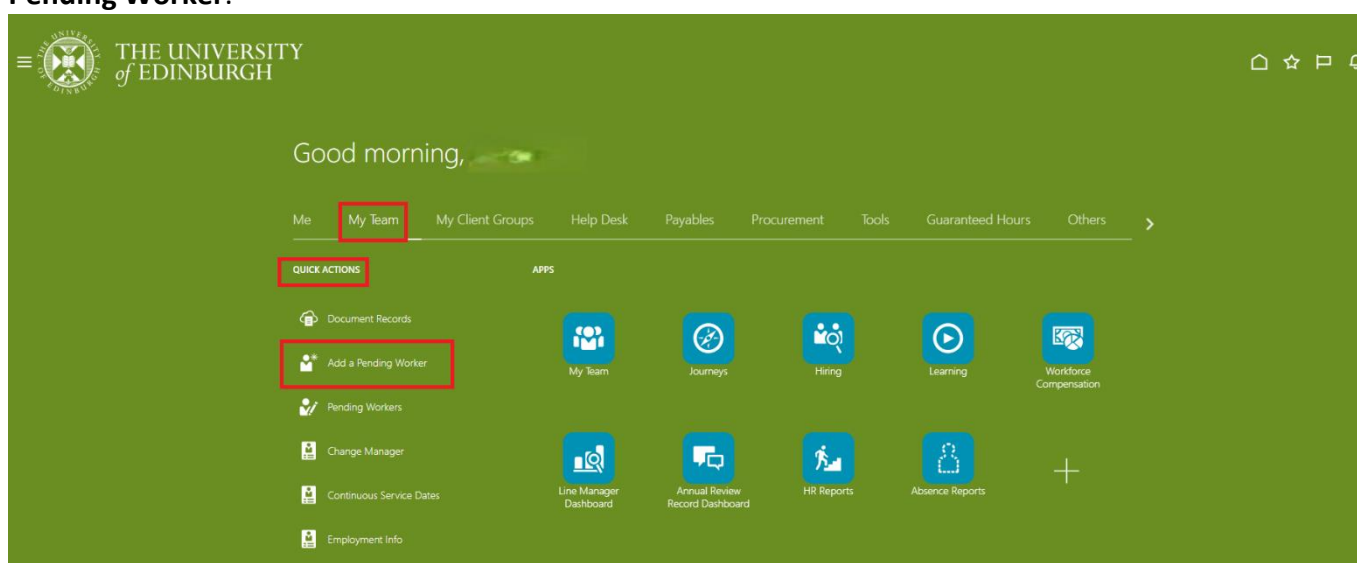
6. Complete the **Email details** section. A work email address will already be populated, please do not change this. **You must ensure a personal email address** is entered. Click on **+Email details**, select **Home email** as the type, then enter the email address. Click **save and continue**.
7. **Addresses – view the details** (cannot edit) and click **Continue**.
8. In the **Assignment 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. Click **Continue**.
9. In the **Additional Assignment Info** section, select the dropdown and add Guaranteed Hours or Annualised/Fractional contract information as required. Then click on **+ icon then the pencil icon** to add. Then click **Continue**.
10. In the **Managers** section, **Add** or **Edit** the line manager of the new hire as needed, then select **Continue**.
11. In the **Payroll Details** section:
  - a. Payroll Frequency – will default to **UOE Group**. Click **Save**.
  - b. Other Info – will default to **University of Edinburgh**. Click **Continue**.
12. In the **Salary** section, use the **Salary Basis** dropdown to select **Annual Salary** then select **Continue**. If the salary is off scale add this.
13. If relevant, complete the **Compensation** section. This should be used for any Premium Band allowance payments that are required. Click **Continue**.
14. Add any comments and upload the completed **Job Requisition Business Case** form to the **Comments and Attachments** section then click **Submit**.

## In Detail

This section provides the detailed steps and includes relevant screenshots from the system.

### Add a Pending Worker

1. From the Home page **Line Managers** should navigate to **My Team, Quick Actions** and select **Add a Pending Worker**.



Note: If you are a School Department Administrator (SDA) you should navigate to **My Client Groups, Quick Actions** and select **Add a Pending Worker**.

2. On the **Info to Include** section, use the toggle button to indicate the information you would like to manage and then click **Continue**. **Additional Assignment Info** should be selected for Guaranteed Hours or Annualised/Fractional contracts. **Compensation** should only be selected for details of any allowances you wish to add.

Add a Pending Worker

## Info to include

**Additional assignment info**  
Add or update additional information for an assignment.  
☒

**Compensation**  
Add additional allowances.  
☐

Cancel Continue Submit

1 | 11

Info to include

When and why

Personal details

Communication info

Addresses

Citizenship info

Assignment

Managers

Payroll details

Salary

3. In the **When and Why** section, complete the following fields:
- Proposed start date** – enter this first to allow the other fields to become editable
  - Proposed Worker Type** – Employee (default)
  - Legal Employer** – select the appropriate from the dropdown menu
  - What’s the way to add the pending worker** – defaults to Add Pending Worker
  - Why are you adding a pending worker** - select Future hire to fill vacant position
  - Business Unit** – select the appropriate from the dropdown menu
  - Position** – select or search for the position you need guidance on this is available in the [Guide to Job Classifications and Position Management](#).

Then select **Continue**.

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Info to include

When and why

Personal details

Communication info

Addresses

Citizenship info

Assignment

Managers

Payroll details

Salary

Compensation

When and why

Proposed Start Date

11/12/2025



Proposed Worker Type

Employee

▼

Legal Employer

University of Edinburgh

▼

What's the way to add the pending worker?

Add Pending Worker

▼

Why are you adding a pending worker?

Future hire to fill vacant position

▼

Business Unit

University of Edinburgh

▼

Position

▼

Required

Cancel

Continue

Submit

4. In the **Personal Details** section, enter just the following information
  - a. **Title**
  - b. **First Name**
  - c. **Preferred Name (if this is unknown please use First Name)**
  - d. **Middle Name**
  - e. **Last Name**
  - f. **Gender**
  - g. **Date of Birth**

Add a Pending Worker

## Personal details

Person Number  
Generated automatically

Global Name

Title

First Name

Preferred Name

Middle Name

Last Name

Gender

Date of Birth

+ National identifiers

Add official national identifier information provided by legislative organizations.

Cancel Save Continue Submit

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Info to include

When and why

Personal details

Communication info

Addresses

Citizenship info

Position override

Assignment

Managers

Payroll details

Salary

- h. If relevant, click the **+Add** button in the **National Identifiers** section
  - i. Country will default to United Kingdom
  - ii. Select **National Insurance Number** under National ID Type
  - iii. Enter the relevant National Insurance Number (if known) in the **National ID** field
  - iv. Then click **Save**

Then click **Continue**.

+ National identifiers

Country  
United Kingdom

National ID Type

National ID

Cancel Save

Cancel Save Continue Submit

### Tips

- Please avoid using special characters wherever possible

- **Preferred Name** is what will be shown in the directory and is used in correspondence from People and Money.
- The **Gender** field informs HMRC so only binary gender is permitted to be updated. However, to update the non-binary options an employee can update this within Additional Person Info (Me > Personal Information > Additional Person Info).
- The new hire will be asked to complete other personal information at the pre boarding stage.

Duplicate Person Check

Once you have completed the when and why, personal details and national identifier information steps above, the system will perform a duplicate worker check. The duplicate worker check runs against the Last Name, First Initial, Date of Birth, Gender or National Insurance Number.

1. If you receive a message regarding Potential Matches follow the important steps below:

Add a Pending Worker

Duplicate person check

▲ Potential matches found

If the person you're adding is one of these people, select the entry to see what you can do next. If not, continue with hiring the new person.

Potential matches

New person being added

UK

Employee

University of Edinburgh

More details

Cancel

Save

Continue

Submit

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Info to include

When and why

Personal details

Duplicate person check

Communication info

Addresses

Citizenship info

Position override

Assignment

Managers

Payroll details

Salary

2. Check the Person Type and Date of Birth. Click on **more details** to expand the employment info for the potential duplicate, this will open on the right-hand side of the page.



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Add a Pending Worker

### Duplicate person check

**Potential matches found**  
If the person you're adding is one of these people, select the entry to see what you can do next. If not, continue with hiring the new person.

**Potential matches**

New person being added

Matching persons

UK Employee University of Edinburgh More details

Info to Include

When and why

Personal details

Duplicate person check

Communication info

Addresses

Citizenship info

Position override

Assignment

Managers

Payroll details

Salary

Employment information

UK

First Name

Last Name

Personal Job Title

Start Date 9/07/2018

Person Type Employee

Termination Date

Business Unit University of Edinburgh

Date of Birth

Department HR - Services

Location Dalhousie Land

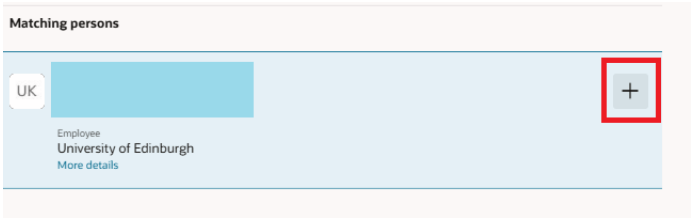
Assignment Number

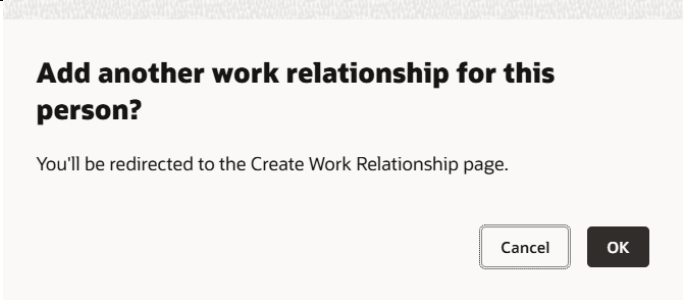
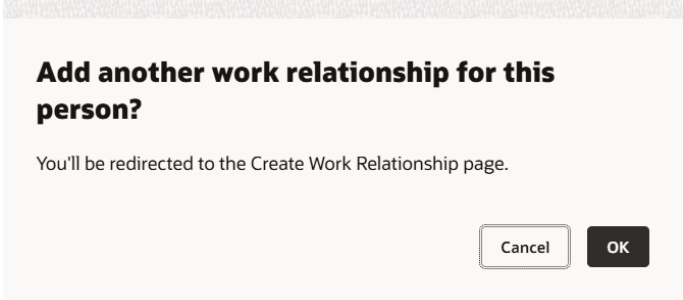
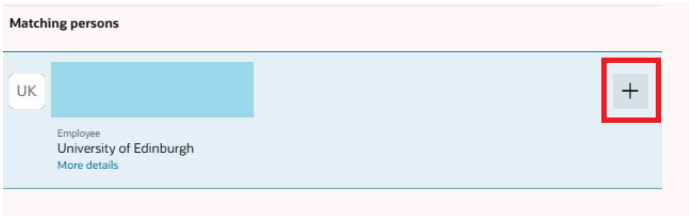
Rehire Reason

Rehire Recommendation

Cancel Save Continue Submit

3. Looking at the Person Type follow the actions as per the below table **in the first instance**. You should check all potential matches. If you establish there is no match, click on the name of the new person being added and then click **Continue**, this will allow you to continue with the **Add Pending Worker process** and will pick up at the step **Add Communication Info step** [below](#).

| Person Type | Action (Use the Employment Information under more details of the duplicate identified)                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Employee    | <ol style="list-style-type: none"> <li>1. <b>Check the termination date.</b> If this is <b>blank</b> or is in the <b>future</b> and the person's name and DOB matches the pending worker name, you will need to raise a Service Request attaching the <a href="#">Request for Transfer, Additional Post or Secondment Form</a> and the approved <a href="#">Job Requisition Business Case</a> form.</li> <li>2. HR Operations will confirm once the request is complete, no further action from you within the pending worker process will be needed.</li> </ol> |
| Employee    | <ol style="list-style-type: none"> <li>1. <b>If the termination date</b> is in the <b>past</b> and the person's name and DOB matches one held for a previous employee click <b>+Add</b>.</li> </ol>  <ol style="list-style-type: none"> <li>2. Proceed to following the steps in the section below for <a href="#">Create Work Relationship (Rehire)</a>.</li> </ol>                                                                                                         |

|                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Employee Casual | <ol style="list-style-type: none"> <li>1. <b>Check the termination date. If this is blank</b> or is in the <b>future and</b> the person's name and DOB matches the pending worker name, you must submit a Service Request to HR Operations to have the termination date brought forward. Use the category Enquiry&gt;Casual Worker. <b>Please title the SR 'URGENT Reverse Casual Termination', including the hire date.</b><br/><br/> <p>Tip - 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.</p> </li> <li>2. HR Operations will then reverse the termination and re-enter 2 days before the hire date.</li> <li>3. Once you receive confirmation step 2 <b>is complete</b>, continue with the add pending worker process, selecting the match to merge with existing record and proceed to following the steps in the section below for <a href="#">Create Work Relationship (Rehire)</a>.</li> </ol>  |
| Employee Casual | <ol style="list-style-type: none"> <li>1. <b>If the termination date is in the past and</b> the person's name and DOB matches one held for a previous casual worker click <b>+Add</b>.<br/><br/>  </li> <li>2. Proceed to following the steps in the section below for <a href="#">Create Work Relationship (Rehire)</a>.</li> </ol>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

|                          |                                                                                                                                                                                                                                                                                                                                                                                                |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                          | <div><p><b>Add another work relationship for this person?</b></p><p>You'll be redirected to the Create Work Relationship page.</p><div><button>Cancel</button><button>OK</button></div></div>                                                                                                                                                                                                  |
| <b>Contingent Worker</b> | <p>If the Person Type is Contingent Worker <b>click Continue at the bottom of the screen.</b> Proceed to following the steps in the section below for <a href="#">further steps to complete the Add Pending Worker</a>. You must <b>NOT</b> merge the duplicate worker record in this scenario.</p> <div><div>Cancel</div><div>Save</div><div><div>Continue</div></div><div>Submit</div></div> |

Tips

If the pending worker has indicated that they have been previously employed by the university during the recruitment process, please ensure you have entered their National Insurance number to support the duplicate person check process.

If you do try to match the new pending worker with an active employee you will see the following error message. In this circumstance you will need to raise a Service Request attaching the [Request for Transfer, Additional Post or Secondment Form](#) and the approved [Job Requisition Business Case](#) form.

 **This person has an active assignment of the same type with the same legal employer**

Update their employment information to continue.



Further steps to complete the Add Pending Worker

1. In the **Communication Info** section enter the **phone and email** details for the new employee:
  - a. To enter phone details click on the **+Phone** details to expand the section, enter the information and click **save**.

Add a Pending Worker

## Communication info

+ Phone details

Country  
United Kingdom 44

Type

Area Code

Number

Extension

Required

Required

Cancel Save

b. To enter email details click

on the **+Email** details to expand the section. A **personal email address** must be entered in **both** the Home email and work email fields. The Work Email must be the primary address. Enter the personal email address in the Work Email field, then click **save**. Repeat to add the Home email, click the +Email details to expand the section enter the personal email information and click save and **continue**.

Add a Pending Worker

## Communication info

+ Phone details

Add a phone number for work-related communication purposes.

+ Email details

Type  
Home Email

Email  
test@gmail.com

Type  
Work Email

Email  
test@gmail.com

Primary

Cancel Save Continue Submit

**Address** section click on the details to expand the and complete the details:

2. In the **+Address** section

- Search for the country of residence from the dropdown.
- Populate the **Type** field e.g., Home.
- Complete Address Line 1, Address Line 2, City or Town and Postcode fields (please note for HMRC purposes **Address Line 1** & **Address Line 2** must be completed).

- d. Click **Save** and then click **Continue**.

Add a Pending Worker

## Addresses

+ Address

Country  
United Kingdom

Type  
Required

Address Line 1  
Required

Address Line 2

Address Line 3

City or Town  
Required

County

Postcode

Cancel Save

Cancel Save Continue Submit

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Info to include

When and why

Personal details

Duplicate person check

Communication info

Addresses

Citizenship info

Position override

Assignment

Managers

Payroll details

Salary

Compensation

Comments and attachments

3. In the **Citizenship Info** section click on the **+Nationality** details to expand the section and complete the details:
- Select the employee's **Nationality** from the dropdown menu.
  - Select the **Citizenship Status** (Active) from the dropdown menu.
  - Click **Save** then **Continue**.

Add a Pending Worker

Citizenship info

+
Nationality

Nationality

Citizenship Status

Cancel
Save

Cancel
Save
Continue
Submit

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Info to include

When and why

Personal details

Duplicate person check

Communication info

Addresses

Citizenship info

Position override

Assignment

Managers

Payroll details

Salary

Compensation

Comments and attachments

#### 4. Add

the **Assignment Details**. Some information will already be populated. Review the table below for guidance and to understand which fields are mandatory (marked with an asterisk). Once you have entered everything click **continue**. Once you have entered the Assignment details, you can save the pending worker record and return to complete at a later stage (it is not possible to save before this step is complete).

| Field Name<br>*Indicates mandatory | Guidance for completion                                                                                                                                                                                   |
|------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Pending Worker Person Type         | Pending Worker                                                                                                                                                                                            |
| Proposed Person Type*              | Employee                                                                                                                                                                                                  |
| Business Unit                      | Defaults from information added in When and Why section. To edit you will have to return to the When and Why section.                                                                                     |
| Projected End Date                 | For fixed term contracts please provide                                                                                                                                                                   |
| Position                           | Defaults from information added in When and Why section. To edit you will have to return to the When and Why section.                                                                                     |
| Personal Job Title*                | This may automatically populate with the position name so <b>it should be overwritten to a meaningful job title</b> . This will also impact on correspondence e.g. contracts so important to update this. |
| Grade Ladder*                      | Defaults to University Grade Ladder                                                                                                                                                                       |
| Grade*                             | The Grade selection is based on the Position used.<br>Enter the Grade, for example the university grade ladder use UE07 for Grade 7. Off-scale salary codes end in an N i.e. UE7N.                        |
| Step                               | Grade Step – select the appropriate                                                                                                                                                                       |
| Department                         | Defaults from information added in When and Why section. To edit you will have to return to the When and Why section.                                                                                     |

|                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-----------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Location*                                           | Where the 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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Calculate FTE and Headcount automatically           | Defaults to Yes – <b>Do not change this</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Working Hours                                       | Defaults to 35 per week but can be amended, must be a weekly figure.<br>For Guaranteed Hours assignments set the working hours to 0 per week to calculate a 0 FTE.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Working Hours Frequency                             | Defaults to Weekly – <b>do not change this</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| FTE                                                 | Automatically populates based on Working Hours                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Working as a Manager                                | Yes or No                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Contract Type Reason Code                           | Must be provided for fixed term contracts and open ended contracts with contract review date.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| NHS Honorary Contract                               | If applicable                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Contract Review Date                                | If applicable – for open ended contracts with contract review date                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Research/Teaching&Research/Teaching only*           | <p><b>1 - Academic Contract that is teaching only</b> (applies only to contracts indicating that staff are teaching only. Teaching should include all related activities such as tutoring and preparation).</p> <p><b>2 - Academic Contract that is research only</b> (should be used for those contracts where the primary academic employment function is research only, even though the contract may include a limited number of hours teaching (up to 6 hours per week or pro-rata for part-time staff)).</p> <p><b>3 - Academic contract that is both teaching and research</b> (applies to contracts that include 6 or more hours of teaching per week (averaged over the number of actual teaching weeks) as a minimum (pro-rata for part-time staff) and the remaining contract hours as research only).</p> <p><b>4 – Not an academic contract</b></p> <p><b>9 - Academic Contract that is neither teaching nor research</b> (should be used for academic contracts where the primary employment function is not teaching and/or research).</p> <p>If a contract is for both academic and non-academic work then the appropriate code from 1 to 3 should only be used where the primary employment function is teaching and/or research.</p> |
| HESA Activity Standard Occupational Classification* | <p>Select the appropriate option.</p> <p>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.</p> <p>For HESA Standard Occupational Classification information view the <a href="#">Staff 2025/26 - Activity Standard Occupational Classification   HESA</a></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| HESA Level*                                         | <p>This is now a mandatory field, please use the <a href="#">table below</a> to select the appropriate HESA level according to the grade of the position being offered.</p> <p>Note: staff in subsidiaries should use 'XpertHR Level N' in all instances.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Clinical Increment Date                             | If applicable                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

| Off Campus Working Days (Approved Flexible Working Only). | <p>If a Flexible Working arrangement agreed (as per the Flexible Working Policy) please enter the days of the week the employee will be working off campus, e.g. Monday and Friday every week. If they will be working set days off campus over a different pattern to weekly (e.g. fortnightly) please provide the details in this section (e.g. every other Friday from home).</p> <p><b>Note</b> - It is important to provide this information here as this will provide HR Operations with the details required for the contract when it is requested. This field has a <b>150 character limit</b>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |            |             |        |                               |      |                                     |             |                               |         |      |          |                              |           |                                 |         |                               |              |                 |          |                      |          |                      |
|-----------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|-------------|--------|-------------------------------|------|-------------------------------------|-------------|-------------------------------|---------|------|----------|------------------------------|-----------|---------------------------------|---------|-------------------------------|--------------|-----------------|----------|----------------------|----------|----------------------|
| Default Expense Account Code*                             | <p><b>Must be added</b> – please refer to the approved Job Requisition Business Case Form.</p> <p>Please note in most circumstances the default expense account code will be the same as the salary costing code. <b>The default expense code cannot be split.</b></p> <p><b>The easiest way to complete this field is to copy and paste the full string, here is an example you must replace with the cost centre with the 8 digit number from the JRBC and include all of the full stops.</b></p> <p>110.110002.cost centre.2410.000000.00000000.00000000.000.000000.000000</p> <p>Alternatively, hover over the box and complete the below fields one by one</p> <table border="1"> <thead> <tr> <th>Field Name</th><th>Code to use</th></tr> </thead> <tbody> <tr> <td>Entity</td><td>110 – University of Edinburgh</td></tr> <tr> <td>Fund</td><td>110002 – General Unrestricted funds</td></tr> <tr> <td>Cost Centre</td><td>From the JRBC Form (8 digits)</td></tr> <tr> <td>Account</td><td>2410</td></tr> <tr> <td>Analysis</td><td>000000 – No Analysis default</td></tr> <tr> <td>Portfolio</td><td>00000000 – No Portfolio default</td></tr> <tr> <td>Product</td><td>00000000 – No Product default</td></tr> <tr> <td>Intercompany</td><td>000 – No Entity</td></tr> <tr> <td>Spare 01</td><td>000000 – No Spare 01</td></tr> <tr> <td>Spare 02</td><td>000000 – No Spare 02</td></tr> </tbody> </table> | Field Name | Code to use | Entity | 110 – University of Edinburgh | Fund | 110002 – General Unrestricted funds | Cost Centre | From the JRBC Form (8 digits) | Account | 2410 | Analysis | 000000 – No Analysis default | Portfolio | 00000000 – No Portfolio default | Product | 00000000 – No Product default | Intercompany | 000 – No Entity | Spare 01 | 000000 – No Spare 01 | Spare 02 | 000000 – No Spare 02 |
| Field Name                                                | Code to use                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |            |             |        |                               |      |                                     |             |                               |         |      |          |                              |           |                                 |         |                               |              |                 |          |                      |          |                      |
| Entity                                                    | 110 – University of Edinburgh                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |            |             |        |                               |      |                                     |             |                               |         |      |          |                              |           |                                 |         |                               |              |                 |          |                      |          |                      |
| Fund                                                      | 110002 – General Unrestricted funds                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |            |             |        |                               |      |                                     |             |                               |         |      |          |                              |           |                                 |         |                               |              |                 |          |                      |          |                      |
| Cost Centre                                               | From the JRBC Form (8 digits)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |            |             |        |                               |      |                                     |             |                               |         |      |          |                              |           |                                 |         |                               |              |                 |          |                      |          |                      |
| Account                                                   | 2410                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |            |             |        |                               |      |                                     |             |                               |         |      |          |                              |           |                                 |         |                               |              |                 |          |                      |          |                      |
| Analysis                                                  | 000000 – No Analysis default                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |            |             |        |                               |      |                                     |             |                               |         |      |          |                              |           |                                 |         |                               |              |                 |          |                      |          |                      |
| Portfolio                                                 | 00000000 – No Portfolio default                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |            |             |        |                               |      |                                     |             |                               |         |      |          |                              |           |                                 |         |                               |              |                 |          |                      |          |                      |
| Product                                                   | 00000000 – No Product default                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |            |             |        |                               |      |                                     |             |                               |         |      |          |                              |           |                                 |         |                               |              |                 |          |                      |          |                      |
| Intercompany                                              | 000 – No Entity                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |            |             |        |                               |      |                                     |             |                               |         |      |          |                              |           |                                 |         |                               |              |                 |          |                      |          |                      |
| Spare 01                                                  | 000000 – No Spare 01                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |            |             |        |                               |      |                                     |             |                               |         |      |          |                              |           |                                 |         |                               |              |                 |          |                      |          |                      |
| Spare 02                                                  | 000000 – No Spare 02                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |            |             |        |                               |      |                                     |             |                               |         |      |          |                              |           |                                 |         |                               |              |                 |          |                      |          |                      |

#### HESA LEVEL

| STAFF LEVEL CODE | STAFF LEVEL DESCRIPTION                      | GRADES ASSIGNED TO STAFF LEVEL CODE           | ADDITIONAL CRITERIA |
|------------------|----------------------------------------------|-----------------------------------------------|---------------------|
| A0               | Vice-Chancellor/Principal/Head of Initiation | Principal only                                |                     |
| B0               | UCEA level 2                                 | Vice-Principal/University Secretary           |                     |
| C1               | UCEA level 3A                                | Report to run by HR to identify this grouping |                     |
| C2               | UCEA level 3B                                | College Registrar                             |                     |
| D1               | UCEA level 3/4A1                             | Report to run by HR to identify this grouping |                     |
| D2               | UCEA level 3/4A2                             | Report to run by HR to identify this grouping |                     |
| D3               | UCEA level 3/4A3                             | Report to run by HR to identify this grouping |                     |
| E1               | UCEA level 4A                                | XM1                                           |                     |
| E2               | UCEA level 4B                                | Report to run by HR to identify this grouping |                     |
| F1               | UCEA level 5A                                | AC4, AM4, ACN4, AMN4, ACT4, AMT4              |                     |



|    |                 |                                                                              |                                                                                           |
|----|-----------------|------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|
|    |                 | UE10 / OTHS <b>Academic</b> staff                                            |                                                                                           |
| F2 | UCEA level 5B   | UE10 / OTHS <b>Non-Academic</b> staff (e.g. Professional services staff)     |                                                                                           |
| I0 | XpertHR level I | UE09, ECA8, AC3A, AC3B, ACN3, ACT3, AM3A, AM3B, AMN3, AMT3, ARW2, XM2A, XM2B | ARC ON SPINAL POINT<br>39, 40, 40, 44, 45, 46, 54, 58, 62, 66                             |
| J0 | XpertHR level J | UE08, ECA7, AC2, AM2, ACN2, AMN2, ARW1, MC3, XM3A, XM3B, RCB3                | ARC ON SPINAL POINT<br>37, 38, 49, 50, 60, 61, 65                                         |
| K0 | XpertHR level K | UE07, UE7N, ECA6, MC2, AFC7, ECA6, XM4A, XM4B, RCB4                          | ARC ON SPINAL POINT<br>29, 30, 30, 36, 41, 42, 47, 48, 51, 52, 53, 55, 56, 57, 59, 63, 64 |
| L0 | XpertHR level L | UE06, UE6N, ECA5, SDS1, MCA, MC1, AFC6, ECA5, XM5A, XM5B, RCB5, K375         |                                                                                           |
| M0 | XpertHR level M | UE05, UE04, UE5N, ECA4, AFC5, RCB6, XM6B                                     |                                                                                           |
| N0 | XpertHR level N | UE03, TR01, ECA3, MA1, MA3, RCB7, XM6A                                       |                                                                                           |
| O0 | XpertHR level O | UE02, ECA2, RCB8                                                             |                                                                                           |
| P0 | XpertHR level P | UE01, ECA1                                                                   |                                                                                           |

## Assignment

|                                                                      |                                                          |
|----------------------------------------------------------------------|----------------------------------------------------------|
| Person Type<br>Pending Worker                                        | Proposed Person Type<br>Employee                         |
| Business Unit<br>University of Edinburgh                             | Primary Assignment<br>Yes                                |
| Projected End Date                                                   | Position<br>HR Administrator (C1) (PAO - Administration) |
| Personal Job Title<br>HR Administrator (C1) (PAO - Administration)   | Grade Ladder<br>University Grade Ladder                  |
| Grade                                                                | Step                                                     |
| Department<br>HR - Services                                          | Location                                                 |
| 100% off campus working (approved flexible working ...<br>No         | Worker Category                                          |
| Assignment Category                                                  | Calculate FTE and headcount automatically<br>Yes         |
| Working Hours<br>35                                                  | Working Hours Frequency<br>Weekly                        |
| FTE<br>1                                                             | Working as a Manager<br>No                               |
| Fixed Term Reason Code                                               | NHS Honorary Contract                                    |
| Contract Review Date                                                 | Research/Teaching&Research/Teaching Only                 |
| HESA Activity Standard Occupational Classifica...                    | HESA Level                                               |
| Clinical Increment Date                                              | Off-Campus Working Days (approved flexible working ...   |
| Default Expense Account<br>....000000.00000000.00000000.000.000000.0 |                                                          |

Cancel

Save

Continue

Submit

9 | 14

Info to include

When and why

Personal details

Duplicate person check

Communication info

Addresses

Citizenship info

Position override

Assignment

Managers

Payroll details

Salary

Compensation

Payroll details

Salary

Compensation

Comments and attachments

5. If relevant, complete the **Additional Assignment info** section. Select the dropdown and add Guaranteed Hours or Annualised/Fractional contract information. You can customise the columns as

per the required fields below by clicking on the customise icon



- a. **For Guaranteed Hours (please note that the information here feeds to the GH App).** Click on the **+ icon then the pencil icon** to add to add in the following information:

- **Current Guaranteed Hours Start date** - enter the same as the contract start date
- **Guaranteed Hours End date** - enter the GH Period end date
- **Number of Hours** - enter the minimum hours to be guaranteed in the initial GH period.
- **Number of Hours Period** - select from one of the available drop-down options (see [Appendix](#) 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)**

Add a Pending Worker

### Additional assignment info

Info Group  
Guaranteed Hours

**Guaranteed Hours**

**+**

| Current Guarante... | Guaranteed Hours En... | Number of Hours | Number of Hou... | Reasc Fo... | Declined th of a Fractio | Action |
|---------------------|------------------------|-----------------|------------------|-------------|--------------------------|--------|
|                     |                        |                 |                  |             |                          |        |

Cancel Save Continue Submit

Then click **Continue.**  
b. **For**

**Annualised/Fractional information.** Click on the **+ icon then the pencil icon** to add in the following information:

- **Number of Weeks per year**
- **Total Annualised Hours per annum**

- **Average Annualised weekly hours**

Add a Pending Worker

### Additional assignment info

Info Group  
Annualised/Fractional information

#### Annualised/Fractional information

+

🗑️

⬇️

⬆️

| Anniversary<br>Start Date | Number of<br>Weeks Per... | Total Annualised<br>Hours per Annum | Average<br>Annualised... | Action |
|---------------------------|---------------------------|-------------------------------------|--------------------------|--------|
|                           |                           |                                     |                          | ✎      |

Cancel
Save
Continue
Submit

Then click

**Continue.**

6. Edit the **Managers** section. This will default to the person creating the pending worker record. **Edit** by clicking on the pencil icon and **amend** the line manager of the new hire as needed. Click **save** then select **Continue**.

Add a Pending Worker

## Managers

[+ Add](#)

|    |                              |                                                                                     |
|----|------------------------------|-------------------------------------------------------------------------------------|
| RC | Manager Type<br>Line Manager |  |
|----|------------------------------|-------------------------------------------------------------------------------------|

Add a Pending Worker

## Managers

[+ Add](#)

Managers ▼ Manager Type ▼  
Line Manager

[Cancel](#) [Delete](#) [Save](#)

[Cancel](#) [Save](#) [Continue](#) [Submit](#)

7. In the **Payroll details** section, this information will be defaulted as follows:
- Payroll Frequency – it will default to UOE Group. **Click save.**
  - Other Info – it will default to University of Edinburgh. **Click Continue.**

Add a Pending Worker

## Payroll details

### Payroll Frequency

Payroll  
UoE Group ▼

Cancel

Save

### Other Info

Tax Reporting Unit  
University of Edinburgh ▼

Cancel

Save

Continue

Submit

8. Add the **Salary**. In the **Salary Basis** select

**Annual Salary**. For all on scale salaries the Salary amount will prepopulate based on the grade and grade step selected in the Assignment section, **if this is an off-scale salary enter the amount** then select **Continue**.

Add a Pending Worker

## Salary

Salary Basis  
Annual Salary

Salary Amount  
41,064.00

GBP Annually

Annual Salary  
41,064.00 GBP (FTE 1)

Grade Ladder  
University Grade Ladder

Grade  
UE07

Grade Step  
UE07 - Step 1

Cancel Save **Continue** Submit

9. If relevant, add **Compensation**. This is only required if a Premium Band allowance is to be added. All other Allowances to be paid from hire date must be included within the Request Contract task within Journeys. If you are not adding an allowance, you can bypass this by clicking **Continue**.
- To add a Premium Band allowance, select **+Add**.

Add a Pending Worker  

## Compensation

**+ Add**

2/04/2026 -  
Value

### Additional compensation

Plan

Option

- Select the **'Plan'** (Allowance) and the Option to match. There will be on screen guidance to help you enter the required information. Add a start date and if the allowance is ongoing (no end date) toggle the button to the right. If there is an end date, add this instead. Remember to select the Percentage (5, 15 or 30%) Select **Save**. Then click **Continue**.

## Additional compensation



|                          |                        |                                     |
|--------------------------|------------------------|-------------------------------------|
| Plan<br>Premium Band     | Option<br>Premium Band | Ongoing<br><input type="checkbox"/> |
| Start Date<br>15/07/2026 | End Date<br>15/07/2026 |                                     |
| Periodicity<br>Hourly    | Percentage<br>5        | Pay Value                           |

[Hide plan info](#)

### Allowance Description

As per the University's [Conditions of Service for UE02-UE10 grades](#), a Premium Band is applied to employees who are contracted to work hours between 10pm and 6am, or to work hours that vary from week to week. 'Premium band payments are 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.

### What information do I need to enter?

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

Then you must enter either 5%, 15% or 30% in the 'Percentage' field. See guidance above on how to determine which percentage to input.

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

Cancel

Save



9. **Comments and attachments.** Upload the completed and approved Job Requisition Business Case form then click **Submit**.

Add a Pending Worker

### Comments and attachments

Comments

Save Comment

**Drag and Drop**  
Select or drop files here.

URL

Add URL

Cancel

Save

**Submit**

**Tip:**

- If you add in

a comment, ensure you click **Save Comment** before saving the changes.

10. **Submit the Pending Worker for approval by HR Operations. An FYI Notification will be sent and is visible from the Bell icon.**

Once approved you will receive a notification to confirm. Up until the start date you can see the pending worker in the **Pending Workers List**.

SDAs should navigate to My Client Groups>Quick Actions>Pending Workers or for Line Managers, My Team > Quick Actions> Pending Workers.

To **edit the pending worker** including amending their start date click on the ellipsis (3 dots) next to the name and select Edit Pending Worker.

< Pending Workers

Search by person name or person number

Q

Proposed Start Date

Proposed Person Type

Legal Employer

Department

Location

Filters

+ Add

More Actions

Sort By Proposed Start Date, Latest to Oldest

| <input type="checkbox"/> | Person Name | Person Number | Legal Employer          | Proposed Start Date | Proposed Person Type | Include in Autoconversion |     |
|--------------------------|-------------|---------------|-------------------------|---------------------|----------------------|---------------------------|-----|
| <input type="checkbox"/> |             |               | University of Edinburgh | 1/09/2026           | Employee             | Yes                       | ... |
| <input type="checkbox"/> |             |               | University of Edinburgh | 1/09/2026           | Employee             | Yes                       | ... |
| <input type="checkbox"/> |             |               | University of Edinburgh | 1/01/2026           | Employee             | Yes                       | ... |

## Next Steps

- The onboarding Journey ‘Welcome to the University of Edinburgh’ will be automatically assigned once the pending worker record is approved.
- If you are appointing an individual on a guaranteed hours or annualised/fractional contract, please ensure you complete the relevant additional information that is required for the contract during the ‘Request contract’ stage.
- Any allowances to be paid from hire date should be noted on the request contract task within Journeys.

## Create Work Relationship (Rehire a previous employee)

You should only follow the steps here once the Duplicate Worker Check has been completed. Typically, the steps below are used in the scenarios where you need to rehire an employee or when a casual worker is starting work as an employee.

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

Add another work relationship for this person?

You'll be redirected to the Create Work Relationship page.

Cancel

OK

2. On the **Info to Include** section, use the toggle button to indicate the information you would like to manage. Then select **Continue**.
  - Email details – **you must select this for all rehires**.
  - Additional assignment info – select if Guaranteed Hours or Annualised/Fractional contract.
  - Managers – you must select this to add or amend the line manager, if not selected it will default to the person creating the record.
  - Compensation – select this to add details of allowances
  - Comments and Attachments – **you must select this**.

3. Enter the **When and Why** information then click **Continue**.
  - a. **Proposed Start Date** - defaults to what was entered previously
  - b. **When is the work relationship start date?** - defaults to day you are creating the record
  - c. **Legal Employer** – defaults to what was entered previously
  - d. **What's the way to create the work relationship?** - Add Pending Work Relationship
  - e. **Why are you adding a work relationship?** - leave blank
  - f. **Business Unit** – select the appropriate from the dropdown menu
  - g. **Position** – select or search for the position you need guidance on this is available in the [Guide to Job Classifications and Position Management](#).

Create Work Relationship

## When and why

Worker Type  
Pending worker

Proposed Start Date  
30/07/2026

When is the work relationship start date?  
24/07/2026

Legal Employer  
University of Edinburgh

What's the way to create the work relations...  
Required

Why are you adding a work relationship?  
Required

Proposed Worker Type  
Employee

Business Unit  
Required

Position

Cancel Continue Submit

2 | 12

Info to include

When and why

Names

Email details

Addresses

Assignment

Additional assignment info

Managers

Payroll details

Salary

4. **Names** - You will be able to **view** the details but not edit.  
 Note - If any of the details are incorrect, the pending worker can update these via the 'Update your personal details and complete equality information' task within the Rejoining the University of Edinburgh Journey, assigned after you have submitted. Click **Continue**.

Create Work Relationship



Names

Title

Miss

First Name

Preferred Name

Middle Name

Last Name

Cancel

Save

Continue

Submit

3 | 12

Info to include

When and why

Names

Email details

Addresses

Assignment

Additional assignment info

Managers

Payroll details

Salary

- Complete the **Email details** section. A work email address will already be populated, please do not change this. **You must ensure a personal home email address is entered.** Click on **+Email details**, select **Home email** as the type, then enter the email address. Click **save then continue**.

Create Work Relationship



Email details

+ Email details

Type

Work Email

Email

Primary

Cancel

Save

Continue

Submit

4 | 12

Info to include

When and why

Names

Email details

Create Work Relationship



Email details

+ Email details

Type

Home Email

Work Email

Email

Required

Cancel

Save

Type

Work Email

Primary

Email

Cancel

Save

Continue

Submit

4 | 12

Info to include

When and why

Names

Email details

Addresses

Assignment

Additional assignment info

Managers

Payroll details

Salary

Create Work Relationship



Email details

+ Email details

Type

Home Email

Email

test@gmail.com

Type

Work Email

Primary

Email

6. **Addresses** – You can view but not edit this.
- Note - If any of the details are incorrect, the pending worker can update these via the ‘Update your personal details and complete equality information’ task within the Rejoining the University of Edinburgh Journey, assigned after you have submitted the Pending Worker. Click **Continue**.

Create Work Relationship

Addresses

Type

Home Address

Address

UNITED KINGDOM

Primary

Cancel

Save

Continue

Submit

5 | 12

Info to include

When and why

Names

Email details

Addresses

Assignment

Additional assignment info

Managers

Payroll details

Salary

7. Add **Assignment Details**. Some information will be populated. Review the table below for guidance and to understand which fields are mandatory (marked with an asterisk). Once you have entered everything click **continue**.

| Field Name<br>*Indicates mandatory | Guidance for completion                                                                                                                                                                                    |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Assignment Number                  | Please <b>do not</b> amend this                                                                                                                                                                            |
| Person Type                        | Pending Worker                                                                                                                                                                                             |
| Proposed Person Type*              | Employee                                                                                                                                                                                                   |
| Projected End Date                 | For fixed term contracts please provide                                                                                                                                                                    |
| Position*                          | Defaults - from information added in When and Why section                                                                                                                                                  |
| Personal Job Title*                | This may automatically populate with the position name so <b>it should be overwritten for a meaningful job title</b> . This will also impact on correspondence e.g. contracts so important to update this. |
| Grade Ladder*                      | Defaults to University Grade Ladder                                                                                                                                                                        |
| Grade*                             | The Grade selection is based on the Position used.<br>Enter the Grade, for example the university grade ladder use UE07 for Grade 7. Off-scale salary codes end in an N i.e. UE7N.                         |
| Step                               | Grade Step – select the appropriate                                                                                                                                                                        |
| Department                         | Defaults - from information added in When and Why section                                                                                                                                                  |
| 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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Calculate FTE and Headcount automatically                 | Defaults to Yes – <b>Do not change this</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Working Hours                                             | Must be a weekly figure.<br>For Guaranteed Hours assignments set the working hours to 0 per week to calculate a 0 FTE.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Working Hours Frequency                                   | Defaults to Weekly – <b>do not change this</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| FTE                                                       | Automatically populates based on Working Hours                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Working as a Manager                                      | Yes or No                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Contract Type Reason Code                                 | Must be provided for fixed term contracts and open ended contracts with contract review date.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| NHS Honorary Contract                                     | If applicable                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Contract Review Date                                      | If applicable – for open ended contracts with contract review date.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Research/Teaching&Research/<br>Teaching only*             | <p><b>1 - Academic Contract that is teaching only</b> (applies only to contracts indicating that staff are teaching only. Teaching should include all related activities such as tutoring and preparation).</p> <p><b>2 - Academic Contract that is research only</b> (should be used for those contracts where the primary academic employment function is research only, even though the contract may include a limited number of hours teaching (up to 6 hours per week or pro-rata for part-time staff).</p> <p><b>3 - Academic contract that is both teaching and research</b> (applies to contracts that include 6 or more hours of teaching per week (averaged over the number of actual teaching weeks) as a minimum (pro-rata for part-time staff) and the remaining contract hours as research only).</p> <p><b>4 – Not an academic contract</b></p> <p><b>9 - Academic Contract that is neither teaching nor research</b> (should be used for academic contracts where the primary employment function is not teaching and/or research).</p> <p>If a contract is for both academic and non-academic work then the appropriate code from 1 to 3 should only be used where the primary employment function is teaching and/or research.</p> |
| HESA Activity Standard Occupational Classification*       | <p>Select the appropriate option.</p> <p>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.</p> <p>For HESA Standard Occupational Classification information view this link. <a href="#">Staff 2025/26 - Activity Standard Occupational Classification   HESA</a></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| HESA Level*                                               | <p>This is now a mandatory field, please use the <a href="#">table below</a> to select the appropriate HESA level according to the grade of the position being offered.</p> <p>Note: staff in subsidiaries should use 'XpertHR Level N' in all instances.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

|                              |                                                                                                                                                                                                                                                                                                                                                                            |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                              | <p>campus over a different pattern to weekly (e.g. fortnightly) please provide the details in this section (e.g. every other Friday from home).</p> <p><b>Note</b> - It is important to provide this information here as this will provide HR Operations with the details required for the contract when it is requested. This field has a <b>150 character limit</b>.</p> |
| Default Expense Account Code | You will not see this field in a rehire scenario. There is a process running in the background to ensure this is added. This is a temporary measure and we are looking to reinstate this and will advise when available.                                                                                                                                                   |

## HESA LEVEL

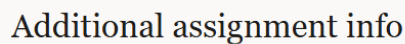
| STAFF LEVEL CODE | STAFF LEVEL DESCRIPTION                      | GRADES ASSIGNED TO STAFF LEVEL CODE                                          | ADDITIONAL CRITERIA                                                                    |
|------------------|----------------------------------------------|------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|
| 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<br><br>UE10 / OTHS <b>Academic</b> staff    |                                                                                        |
| F2               | UCEA level 5B                                | UE10 / OTHS <b>Non-Academic</b> staff (e.g. Professional services staff)     |                                                                                        |
| IO               | 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                             |
| JO               | 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                                                                   |                                                                                        |

8. If relevant, complete the **Additional Assignment info** section. Select the dropdown and add Guaranteed Hours or Annualised/Fractional contract information. You can customise the columns as





- ### Create Work Relationship



### Guaranteed Hours



No data to display.

 $7|_{12}$ 

### Info to include

## When and why

## Names

### Email details

## Addresses

## Assignment

### Additional assignment info

### Guaranteed Hours

Declined the  
Offer of a...

### Action



Then click

**Continue.**

b. **For Annualised/Fractional information.** Click on the + icon then the pencil icon to add in the following information:

- **Number of Weeks per year**
- **Number of Hours per week**
- **Total Annualised Hours per annum**
- **Average Annualised weekly hours**
- **Fractional Period** – select from dropdown
- **Hours to be worked/scheduled**

Create Work Relationship

 Additional assignment info

Info Group  
Annualised/Fractional information

**Annualised/Fractional information**

| Anniversary Start Date | Number of Weeks Per... | Total Annualised Hours per Annum | Average Annualised... | Action |
|------------------------|------------------------|----------------------------------|-----------------------|--------|
| No data to display.    |                        |                                  |                       |        |

7 | 12

Info to include

When and why

Names

Email details

Addresses

Create Work Relationship

 Additional assignment info

Info Group  
Annualised/Fractional information

**Annualised/Fractional information**

| Anniversary Start Date                                                                | Number of Weeks Per... | Total Annualised Hours per Annum | Average Annualised... | Action |
|---------------------------------------------------------------------------------------|------------------------|----------------------------------|-----------------------|--------|
|  |                        |                                  |                       |        |

Then click **Continue**.

9. Edit the **Manager** section. This will default to the person creating the pending worker record. **Edit** by clicking on the pencil icon and **amend** the line manager of the new hire as needed. Click **save** then select **Continue**.

Create Work Relationship

GM **Managers**

Manager (C1) (PAO - Finance),

+ Add

RC

Manager Type  
Line Manager



10. In the **Payroll details** section, this information will be defaulted as follows:
- Payroll Frequency – it will default to UOE Group. **Click save.**
  - Other Info – it will default to University of Edinburgh. **Click Continue.**

Add a Pending Worker

## Payroll details

**Payroll Frequency**

Payroll  
UoE Group

Cancel Save

**Other Info**

Tax Reporting Unit  
University of Edinburgh

Cancel Save Continue Submit

11. Add **Salary**. In the **Salary Basis** select **Annual Salary**. For all on scale salaries the Salary amount will prepopulate based on the grade and grade step selected in the Assignment section, **if this is an off-scale salary enter the amount** then select **Continue**.

Create Work Relationship

Salary

Salary Basis  
Annual Salary

Salary Amount  
34,610.00

GBP Annually

Annualized Full-Time Salary  
34,610.00 GBP

Grade Ladder  
University Grade Ladder

Grade  
UE06

Grade Step  
UE06 - Step 1

Cancel

Save

Continue

Submit

10 | 12

Info to include

When and why

Names

Email details

Addresses

Assignment

Additional assignment info

Managers

Payroll details

Salary

12. If relevant, add **Compensation**. This is only required if a Premium Band allowance is to be added. All other Allowances to be paid from hire date must be included within the Request Contract task within Journeys. If you are not adding an allowance, you can bypass this by clicking **Continue**.

a. To add an allowance, select **+Add**. If the allowance you require is not listed, please include this information in the **comments and attachments** section below.

Create Work Relationship

Compensation

+ Add

1/04/2026 -

Value

Additional compensation

Plan

Option

b. **Select the 'Plan'** (Allowance) and the Option to match. There will be on screen guidance to help you enter the required information. Add a start date and if the allowance is ongoing (no end date) toggle the button to the right. If there is an end date, add this instead. Remember to select the Percentage (5, 15 or 30%). Select **Save**. Then click **Continue**.

## Additional compensation



|                          |                        |                                     |
|--------------------------|------------------------|-------------------------------------|
| Plan<br>Premium Band     | Option<br>Premium Band |                                     |
| Start Date<br>15/07/2026 | End Date<br>15/07/2026 | Ongoing<br><input type="checkbox"/> |
| Periodicity<br>Hourly    | Percentage<br>5        | Pay Value                           |

[Hide plan info](#)

### Allowance Description

As per the University's [Conditions of Service for UE02-UE10 grades](#), a Premium Band is applied to employees who are contracted to work hours between 10pm and 6am, or to work hours that vary from week to week. 'Premium band payments are 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.

### What information do I need to enter?

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

Then you must enter either 5%, 15% or 30% in the 'Percentage' field. See guidance above on how to determine which percentage to input.

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

Cancel

Save

- Comments and attachments.** Upload the completed and approved Job Requisition Business Case form then click **Submit**. Please also use this section to list any allowances not able to select in the compensation section, and use this to provide any supporting documentation/rationale for the allowance.

Create Work Relationship



Comments and attachments

Comments

Save Comment

Drag and Drop

Select or drop files here.

URL

Add URL

Cancel

Save

Submit

11 | 11

Info to include

When and why

Names

Addresses

Assignment

Additional assignment info

Managers

Payroll details

Salary

Compensation

## Tip

- If you add in a comment, ensure you click **Save Comment** before saving the changes.

## 14. Submit the Pending Worker for approval by HR Operations. An FYI Notification will be sent and is visible from the Bell icon.

Once approved you will receive a notification to confirm. Up until the start date you can see the pending worker in the **Pending Workers List**.

SDAs should navigate to My Client Groups>Quick Actions>Pending Workers or for Line Managers, My Team > Quick Actions> Pending Workers.

To **edit the pending worker** including amending their start date click on the ellipsis (3 dots) next to the name and select Edit Pending Worker.

< Pending Workers

Search by person name or person number

Q

Proposed Start Date

Proposed Person Type

Legal Employer

Department

Location

Filters

+ Add

More Actions

Sort By Proposed Start Date, Latest to Oldest

| <input type="checkbox"/> | Person Name | Person Number | Legal Employer          | Proposed Start Date | Proposed Person Type | Include in Autoconversion |     |
|--------------------------|-------------|---------------|-------------------------|---------------------|----------------------|---------------------------|-----|
| <input type="checkbox"/> |             |               | University of Edinburgh | 1/09/2026           | Employee             | Yes                       | ... |
| <input type="checkbox"/> |             |               | University of Edinburgh | 1/09/2026           | Employee             | Yes                       | ... |
| <input type="checkbox"/> |             |               | University of Edinburgh | 1/01/2026           | Employee             | Yes                       | ... |

## Next Steps

- The onboarding Journey 'Rejoining the University of Edinburgh' will be automatically assigned once the pending worker record is approved.
- If you are appointing an individual on a guaranteed hours or annualised/fractional contract, please ensure you complete the relevant additional information that is required for the contract during the 'Request contract' stage.
- Any allowances to be paid from hire date should be noted on the request contract task within Journeys.

## Appendix

### *Description for Guaranteed Hours Period Cover / Number of Hours Period Field*

Each should be used in the following scenarios:

| Option                                                                           | Description                                                                                              | When to use                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|----------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Over Period of Current GHC<br><br><b>Use this for contracts less than a year</b> | Minimum hours to be guaranteed for full duration of GH contract e.g. over the 2-year fixed term contract | <ul style="list-style-type: none"><li>• The GH period start and end date and Fixed Term Contract start and projected end date must be the same.</li><li>• You do not need to tick the Annually reviewed box in the Job Offer Additional Information screen.</li><li>• No GH refresh letter is required unless the fixed term contract is subsequently extended.</li><li>• This option and Over Period of Current FTC are similar. Please check with your HR Partner if there is a preferred approach in your School/Department.</li></ul> |
| Over Period of Current FTC<br><br><b>Not in use</b>                              | Minimum hours to be guaranteed for full duration of the current fixed term contract.                     | <ul style="list-style-type: none"><li>• The GH period start and end date and Fixed Term Contract start and projected end date must be the same.</li><li>• You do not need to tick the Annually reviewed box in the job offer Additional Information screen.</li><li>• No GH refresh letter is required unless the fixed term contract was extended.</li><li>• This option and Over Period of Current GHC are similar. Please check with your HR Partner if there is a preferred approach in your School/Department.</li></ul>             |



|                                                                                          |                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Per Year</p> <p><b>Use this for contracts a year or longer</b></p>                    | <p>The minimum hours to be guaranteed for one GH Period.</p>                                                | <ul style="list-style-type: none"> <li>• This option is recommended for individuals getting a contract for a number of years.</li> <li>• The GH period is a year from the GH Start date. i.e. if start date is 01/09/2023 the GH end date must be 31/08/2024.</li> <li>• The GH employee will only get access to a timecard to claim payment if they have a current GH period.</li> <li>• You <b>do need</b> to tick the Annually Reviewed box in the job offer Additional Information screen.</li> <li>• You need to send a GH refresh letter at the end of each GH period.</li> </ul>                                                                |
| <p>Per Year, Every Year for (use with open ended contracts)</p> <p><b>Not in use</b></p> | <p>The minimum hours to be guaranteed are to be the same minimum hours for each GH Period, indefinitely</p> | <ul style="list-style-type: none"> <li>• This option is usually used for open-ended assignments.</li> <li>• By selecting this option, from the outset of the contract, you are guaranteeing the employee the same minimum hours each year from the duration of the open-ended contract. This may be an issue if the demand for the work or budget available changes over time.</li> <li>• You do not need to tick the Annually reviewed box in the job offer Additional Information screen.</li> <li>• There is no need to send a GH refresh letter, but you should monitor the actual number of hours worked versus the minimum guarantee.</li> </ul> |

|                                                                       |                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|-----------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Per Year/Every Year-Over<br/>Dura/FTC</p> <p><b>Not in use</b></p> | <p>The minimum hours to be guaranteed are to be the same for each GH Period for the full duration of the fixed term employment contract related to that assignment.</p> | <ul style="list-style-type: none"> <li>• Use this if you have a stable requirement for hours.</li> <li>• By selecting this option, from the outset of the contract, you are guaranteeing the employee the same minimum hours each year from the duration of the fixed term contract. This may be an issue if the demand for the work or budget available changes over time.</li> <li>• You do not need to tick the Annually reviewed box in the job offer Additional Information screen.</li> <li>• There is no need to send a GH refresh letter, but you should monitor the actual number of hours worked versus the minimum guarantee.</li> <li>• No refresh letter is required unless the fixed term contract is extended.</li> </ul> |
|-----------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

## Version History

| Version | Date           | Description                                                                                                                                                                                                                                                         | Approved By |
|---------|----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| 1.0     | 27 July 2026   | <ul style="list-style-type: none"><li>• Transferred guide to new format</li><li>• Replaced all screenshots to reflect the new look of Redwood screens</li><li>• Updated Compensation section to reflect removal of allowances except Premium Band Payment</li></ul> | SK          |
| 1.1     | 11 August 2026 | <ul style="list-style-type: none"><li>• Updated for Fixed Term Contract project</li></ul>                                                                                                                                                                           | RM          |

## Reviewers & Approvers

Further details of the Reviewers and Approvers of this document can be found by contacting HR Process Improvement. Please raise a Service Request using the category Continuous Improvement.