



## Guide to Casual Workers, External Examiners, Taxable Scholarships and Intermediary Workers

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## Introduction

This guidance provides information to help you understand how to manage HR processes that impact Employee-Casual worker types.

In People and Money, the worker type Employee-Casual is used to create assignments for the following:

- Casual Workers
- External Examiners
- Taxable Scholarships
- Intermediary Workers

From Phase 2 all worker types listed above must have a record in People and Money in order to be paid. They will not receive system access (unless requested via local procedures) and will not be assigned any onboarding tasks. All active Employee Casual worker types were migrated from Legacy Oracle system effective April 2022.

The [Guide to Payroll for Employees, Managers, SDA's and HR Operations](#) outlines the process for creating a new record (assignment) in People and Money and the payment of these workers. HR Operations are responsible for creating the record in People and Money.

The information below is to help you understand how to manage casual workers, external examiners, taxable scholarships and intermediary workers **who are offered a job within the University as an employee** and employees who may complete some casual work. The below outlines the scenarios and subsequent actions needed by Line Managers, School Department Administrators (SDAs), HR Operations and Payroll.

This does not impact the process before the Offer Stage and the steps within the [Guide to Recruitment and Onboarding](#) should still be followed (until you reach Step 10 Hire).

Changes to worker type 'Employee-Casual' should be submitted by Service request to HR Operations.

The scenarios covered within this guidance are:

[1. Employee plus Worker Type 'Employee Casual'](#)

[2. Employee Casual to Employee via Recruitment \(advertised post\)](#)

[3. Employee Casual to Employee via Add Pending Worker process \(non advertised posts\)](#)

Before you start

You should familiarise yourself with the information here:

[Casual Payroll Guidance](#)

[Taxable Scholarships Process](#)

[Payments to External Examiners](#)

[Payments to Intermediary Workers](#)

If users have any queries about a stage in this process, they should Search My Knowledge for support in the first instance. Follow the P&M user guide '[How to search my knowledge](#)'. If they cannot find the information they need they should raise a service request, following the P&M user guide '[How to raise and maintain a service request enquiry](#)'

Process Map

The [Process Map](#) covers the following:

- Employee Casual to Employee via Recruitment (advertised post)
- Employee Casual to Employee via Add Pending Worker process (non advertised posts)

## 1. Employee plus Worker Type 'Employee Casual'

The table below covers the scenario of an Employee taking on casual work.

Current Worker Type	Change in worker type	Line Manager/School Department Administrator (SDA)	HR Operations	Payroll
Employee	Casual Worker	1) Submit TAPs ( <a href="#">Temporary Additional Payment</a> ) Form to Payroll via Service Request (SR)	N/A	2) Process TAP form in monthly payroll
Employee	Taxable Scholarship	1) Submit <a href="#">Taxable Scholarship/Studentship payment form</a> to HR Operations via SR	2) Check if current employee and <a href="#">add additional assignment</a> to employee record with recurring Taxable Scholarship element  3) Forward SR to payroll for payment	4) Process Payment Scholarship Payment in monthly payroll
Employee	External Examiner	1) Submit <a href="#">External Examiner Form</a> to HR Operations via SR Category: Interim Forms> External Examiner (note the External Examiner Timesheet must be sent to Payroll via SR Category: Interim Forms > External Examiner Timesheet )	2) Check if current employee and <a href="#">add additional assignment</a> with worker type 'Employee Casual' to employee record 3) Forward SR to Payroll for payment	4) Process Payment of External Examiner timesheet in monthly payroll
Employee	Intermediary Worker	1) Submit <a href="#">Agreement for Intermediary Workers form</a> via SR to HR Operations	2) Check if current employee and <a href="#">add additional assignment</a> with worker type 'Employee Casual' to employee record 3) Forward SR to Payroll for payment	4) Process Payment of Intermediary Worker in monthly payroll

## 2. Employee Casual to Employee via Recruitment (advertised post)

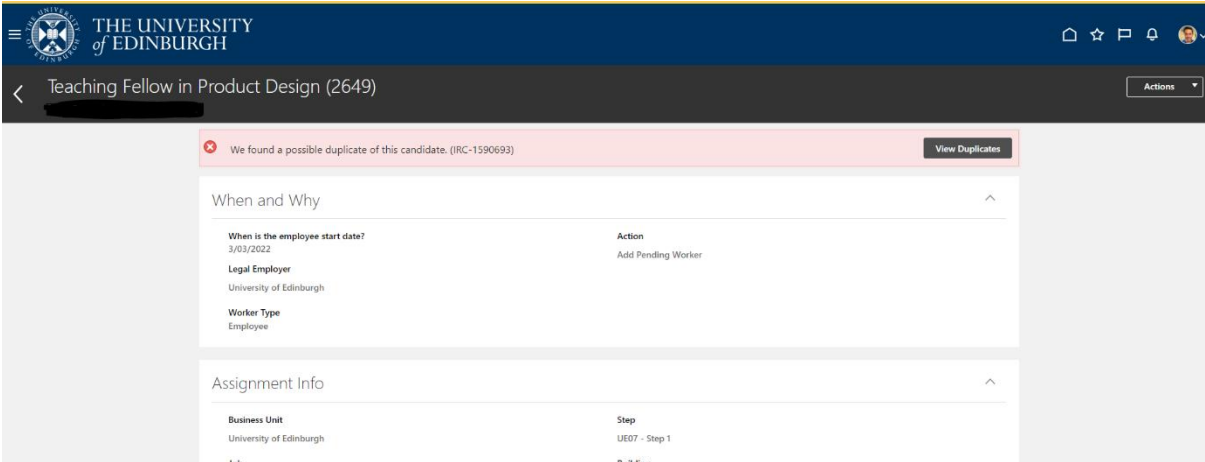
The table below covers a Casual Worker being offered a job as an employee via an advertised post in People and Money.

Current Worker Type	Change in worker type	Line Manager/School Department Administrator (SDA)	HR Operations	Payroll
Casual Worker External Examiner Taxable Scholarship Intermediary Worker	Employee	1) LM/SDA Extends Offer 2) Offer Accepted – Move to HR 3) Duplicate Identified and moves to HR-Error During process. HR Operations pick up these and take corrective action. 5) Follow <a href="#">Add Pending Worker Process</a> , selecting the match to merge with existing record 6) Manually Assign Preboarding Checklist 7) Continue with Preboarding and onboarding process as per the <a href="#">Guide to Recruitment &amp; Onboarding</a> (Step 11 onwards)	4) Access the Manage Job Offers app and review duplicate (see screen shot in supporting information below).  a) If Casual Worker or Intermediary Worker (Grade IR1) with Future dated Termination Date (or no termination date) <ul style="list-style-type: none"> <li>- Reverse Termination &amp; Re-terminate <b>2 days before hire date</b></li> <li>- If no termination date, terminate <b>2 days before hire date</b></li> <li>- Email the Hiring Manager/SDA to proceed with hire via Add Pending Worker Process</li> </ul> b) If External Examiner (Grade EE1) or Taxable Scholarship with current assignment <ul style="list-style-type: none"> <li>- Follow the <a href="#">How to Add Assignment process</a></li> </ul> c) If the Termination Date <b>is in the past</b> for any Employee casual worker type <ul style="list-style-type: none"> <li>- Merge record</li> <li>- Follow steps in the 'recreate offer' stage, Action Reason is 'Add Pending Work Relationship' and bypass HR Approval. This will create the pending worker record.</li> </ul>	8) Process Payment in monthly payroll

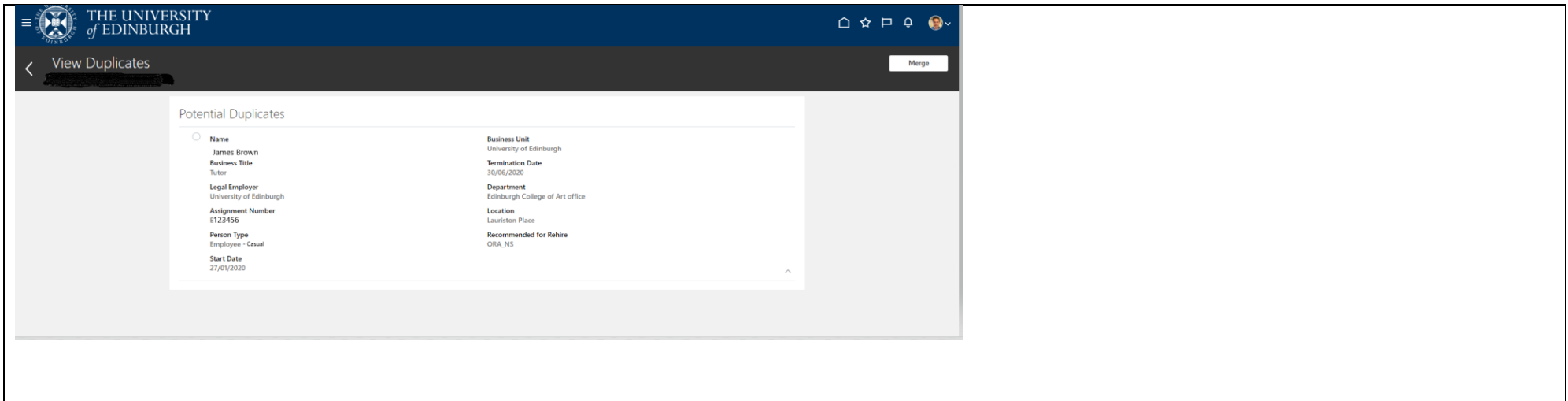
d) There may be instances where more than one duplicate is found, when there is an active worker type 'employee casual' and an inactive (terminated) employee record. In this scenario you should merge with the employee record, there will be no need to bring forward the termination date of the casual record.

**Supporting Information for HR Operations**

In the manage job offers area HR Operations will see a candidate at Error During Processing state. At the top of the record they will see the following whereby they need to click "View duplicates"



Expand the section for the duplicate and review to see if the person type is 'employee casual' and the termination date.



### 3. Employee Casual to Employee via Add Pending Worker process (non advertised posts)

The table below covers a Casual Worker being offered a job as an employee via a NON advertised post.

Current Worker Type	Change in worker type	Line Manager/School Department Administrator (SDA)	HR Operations	Payroll
Casual Worker External Examiner Taxable Scholarship Intermediary Worker	Employee	1) Follow <a href="#">Add Pending Worker Process</a> 2) At the point of the warning message 'The selected person has an active assignment of this type with the legal employer' CHECK if Person Type = Employee Casual and the Termination Date (see screen shot in supporting information). 3) <b>If Termination date is in the past</b> continue with add pending worker process, selecting the match to merge with existing record	6) Upon receipt of SR Check Worker Type in more detail & termination date  a) If Casual Worker or Intermediary Worker (Grade IR1) with Future dated Termination Date - Reverse Termination & Renter <b>2 days before hire date</b> - Close SR and within notify the LM/SDA to continue with adding the Pending Worker process.  b) If External Examiner (Grade EE1) or Taxable Scholarship	7) Process Payment in monthly payroll

		<p>4) Pending Worker Created. Manually Assign the Preboarding Checklist</p> <p>5) <b>If Termination Date in the future or No Termination Date</b> send an SR to HR Operations using the category Enquiry&gt;Casual Worker. <b>Please title the SR ‘URGENT Reverse Casual Termination’ and include details of the hire date.</b></p> <p>Note - 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 in this scenario you do not need to submit the Service Request to reverse the casual termination date.</p> <p>7) Continue with add pending worker process, selecting the match to merge with the existing record. Please select the Action ‘Add Pending Worker Relationship’</p> <p>8) Manually Assign pre-boarding checklist</p> <p>9) Continue with preboarding and onboarding process as per the <a href="#">Guide to Recruitment &amp; Onboarding</a> (Step 11 onwards).</p>	<ul style="list-style-type: none"> <li>- Close SR and Notify LM/SDA to submit a Request for Transfer / Additional Post form and process upon receipt as an additional assignment.</li> </ul>	
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## Supporting Information for Line Manager/SDA

### Screen Shot of potential Person Match:

Add a Pending Worker Save Submit Cancel

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

Potential Matches

No match, add person

**Person Name**  
James Brown

**Legal Employer**  
University of Edinburgh

**Person Type**  
Employee Casual

**Business Unit**  
University of Edinburgh

**Department**  
Academic and Student Administration - CAHSS

**Assignment Number**  
E259419

**Start Date**  
8/03/2022

**Personal Job Title**  
Administrator (B1) (PAD - Administration)

**Termination Date**

**Date of Birth**  
1/03/1987

**Location**  
1-7 George Square

**Work Email**  
gregjaye@yahoo.com

**Country**  
United Kingdom

Continue

### Selecting the record displays the following:

Add a Pending Worker Save Submit Cancel

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

Potential Matches

No match, add person

**Person Name**  
James Brown

**Legal Employer**  
University of Edinburgh

**Person Type**  
Employee Casual

**Business Unit**  
University of Edinburgh

**Department**  
Academic and Student Administration - CAHSS

**Assignment Number**  
E259419

**Start Date**  
8/03/2022

**Country**  
United Kingdom

**Error**

The selected person has an active assignment of this type with this legal employer.

OK Cancel

Continue