Before you start

HR Operations has already carried out pre-hire checks on candidates hired outside ORC before a Pending Worker record is created in People and Money.

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

The Appointee Information Form should be completed by the new hire before you start this process.

Rehired employees will need to have generic preboarding checklist manually assigned to generate and receive their contract. Irrelevant tasks will need to be removed from the checklist.

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 checklist tasks at a later stage.

From Phase 2 you must now add allowances (if applicable) to the Compensation section. If the allowance you need is not listed please add this to the comments section.

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

Add a Pending Worker

1. From the Home page click My Client Groups, and select Show More under Quick Actions

2. Select Add a Pending Worker

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

4. Complete the When and Why section and click Continue

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

6. If a duplicate record is found, check the Person Type and Termination Date, following the steps on page 8 and 9 below. If no duplicate found, continue to step 7

7. Complete the Communication Info section. A personal email address must be entered in both the personal email address and work email address field. Click Continue

8. Add Address details.

9. Click Continue in the citizenship info section as the candidate can complete this themselves

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

11. In the Employment Details section complete the mandatory fields, 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

12. In the Additional Assignment Info section, select the dropdown and add Guaranteed Hours or Annualised/Fractional contract information as required, then click Continue
13. In the **Maintain Managers** section, Add or Edit the line manager of the new hire as needed, then select **Continue**.

14. In the **Payroll Details** section, select UoE Group in the **Payroll Frequency** section then select **University of Edinburgh** as the **Tax Reporting Unit**. Then select **Continue**.

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

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

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

**Rehire a previous employee**

1. Select the previous worker record and click **Continue**.
2. Click **Ok**.
3. **Check the boxes** against all the info you would like to manage and then press **Continue**.
4. Complete the **When and Why** section and click **Continue**.
5. Confirm the **personal details** are correct then click **Continue**.
6. Add or amend **Communication Info** as required then click **Continue**.
7. Add or amend **Address** details as required then click **Continue**.
8. Add or amend **Citizenship Info** as required then click **Continue**.
9. In the **Employment Details** section complete the mandatory fields, 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**.
10. In the **Additional Assignment Info** section, select the dropdown and add Guaranteed Hours or Annualised/Fractional contract information as required, then click **Continue**.

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

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

13. In the **Payroll Details** section, select UoE Group in the **Payroll Frequency** section then select **University of Edinburgh** as the **Tax Reporting Unit**.

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

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

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

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

---

**In Detail...**

1. From the **Home** page, click on the **My Client Groups** and select **Add a Pending Worker**.
2. **Check the boxes** against all the info you would like to manage and then press **Continue**.

![Add a Pending Worker](image)

3. In the **When and Why** section,
   a. Enter the **Pending worker start date**
   b. Select the relevant **Legal Employer**
   c. Select the relevant **Proposed Worker Type**
   d. Make sure the Action under ‘What’s the way to add the pending worker’ states ‘Add Pending Worker’
   e. Select the Action Reason ‘**Future hire to fill vacant position**’ in the ‘Why are you adding a pending worker section’
   f. Then press **Continue**.

![Add a Pending Worker](image)

4. In the **Personal Details** section, enter just the information in the mandatory fields plus the worker **Title** and **Preferred Name**. Please avoid using special characters where ever possible
The new hire will be asked to complete other personal information at the pre-boarding stage.

### Note:

a. If the preferred name has not been provided, **please enter their first name**. Preferred name is used in People and Money, not first name. So omitting this will impact correspondence and how their name appears in the directory (which only shows preferred name).

b. The following fields **must not** be completed:
   - Student Number
   - UOE_MORAY_HOUSE_TERMS
   - STSS/GTC number
   - HESA Staff Identifier
   - UOE_UUN
   - HESA Disability 1
   - HESA Disability 2
   - HESA previous institution
   - REF Unit of Assessment
   - HESA Highest Qualification
   - HESA previous employment
   - Visitor Registration Number (Finance Use Only)

5. Click the **Add** button in the National Identifiers section, enter the **National Insurance Number** (if known), and then click **Continue**.
The duplicate worker check runs against the National Insurance Number. If you receive a message regarding Potential Matches see the steps below.

**Checks you must carry out from Phase 2**

At the point of the duplicate check, you may receive a warning message ‘The person has an active assignment of this type with the legal employer’, this means they are currently active on payroll. You must check the person type:
Person Type = Employee
Expand the section for the duplicate and check the Person Type field, if this is ‘Employee’ the **termination date is blank** and the person name matches the pending worker name, you will need to raise an Service Request (Internal Transfer to Advertised Post) attaching the Request for Transfer, Additional Post or Secondment Form and the approved Job Requisition Business Case.

If the name matches but there is a **termination date in the past** select the previous worker record and click **Continue, following the steps** for **Rehire a previous employee**.

If the hire has indicated that they have been previously employed by the university, the Person Type field is ‘Employee’ but has not provided a National Insurance number, please request this from the candidate before proceeding.

OR

**Person Type = Employee Casual**
If the Person Type – is ‘Employee-Casual’ and the termination date is in the future or blank and the person name matches you must submit a Service Request to HR Operations to have the termination date brought forward. Use the category Enquiry>Casual Worker. Please title the SR ‘URGENT Reverse Casual Termination’, including the hire date.
HR Operations will then reverse the termination and renter 2 days before the hire date.

There may be instances where more than one duplicate is found, when there is an active worker type ‘employee casual’ and an inactive (terminated) employee record. In this scenario, you should merge with the employee record and you do not need to submit the Service Request to reverse the casual termination date.

**Once this is complete**, continue with add pending worker process, selecting the match to merge with existing record using the Action ‘Add Pending Worker Relationship’.

If the details do not match, click **No match, add person** then **Continue** and return to follow the create a pending worker process.

Further guidance on hiring a casual worker, external examiner, intermediary worker or taxable scholarship as an employee is available [here](#).

6. In the **Communication Info** section enter contact details for the new employee. A **personal email address** must be entered in both the personal email address and work email address field.
7. Add **Address** details. If not recorded here, the candidate is reminded to check and enter this information in a preboarding task however this information is required for payroll and pension purposes.

8. Click **Continue** in the **citizenship info** section as the candidate can complete this themselves.
9. Click **Continue** within the **Family and Emergency Contacts** section as the employee can complete these details themselves at the preboarding stage.

10. In the **Employment Details** section,
   a. Make sure the Assignment Status is set to **Active – Payroll Eligible**
   b. Search for and select the relevant **Business Unit**
   c. Select the relevant **Assignment Category**
   d. Add the **Personal Job Title**
      **Note:** This automatically populates with the position name so it should be overwritten for a meaningful job title. This will also impact on correspondence e.g. contracts.
e. For fixed term workers only, ensure the **Projected End Date** is completed
f. Fill in all other relevant information as required for the contract
g. Select relevant **Department**.

Then, press **Continue**

**Note:**

- You must enter the all relevant details here as they pull through into the pending worker assignment details.
- The following fields **do not** need to be completed:
  1. Worker Engagement Details
  2. Uniformed Grade (check box)
  3. Standard Working Hours Override
  4. HESA Reason for End of Contract
  5. Role Identifier

- The following fields **should be** updated as per below:
  1. **Research/Teaching & Research/Teaching only**:
     1. Academic Contract that is teaching only
     2. Academic Contract that is research only
     3. Academic contract that is both teaching and research
     4. Non academic contract
9 - Academic Contract that is neither teaching nor research

The default values that subsidiaries should select is "Option 4".

2. **HESA Activity Standard Occupational Classification** - select the appropriate option. For subsidiaries please select the code which matches closest the type of role. For subsidiaries this information will not be returned as part of the HESA submission

   - Follow the guidance for position management and request a new position or a position change to ensure there is adequate FTE available to appoint the new hire to.
   - Ensure you complete the Grade Ladder and Grade details to automatically pull the salary through into the Salary details. For the university grade ladder use UE07 for Grade 7. Off-scale salary codes end in an N i.e. UE7N.
   - For fixed term assignments, ensure you complete the Fixed Term Reason Code and Projected End Date.
   - For Guaranteed Hours assignments set the working hours to 0 per week to calculate a 0 FTE, and use the additional assignment information in a later section to record the details.
   - For HESA Standard Occupational Classification information for 2019/2020 click [here](#).

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

For Guaranteed Hours:
a. **Current Guaranteed Hours Start Date**

b. **Guaranteed Hours End Date** – enter end date for GH hours

c. **Number of Hours** - enter total number of hours for the contract

d. **Number of Hours Period** - enter period over which the hours will be worked:
   - Over period of current FTC
   - Over Period of Current GHC
   - Per Year
   - Per Year Every Year
   - Per Year Every Year over the duration of the FTC

e. If applicable, enter **Reason for No Hours:**
   - Long Term Sick
   - Maternity Leave/Shared Parental Leave
   - Suspension of Contract for Agreed Reasons

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

13. In the Payroll section select UoE Group in the Payroll Frequency section then select University of Edinburgh as the Tax Reporting Unit. Click Continue.
14. In the **Salary** section, use the **Salary Basis** dropdown to select **Annual Salary** then select **Continue**

The salary amount should populate for all on-scale salaries. If this is an off-scale salary, populate the **Salary Amount** field as appropriate.

15. Update the **Compensation** section if any additional allowances are to be added. There are 14 allowance types that can be selected:

- Acting Up Allowance
- Contractual Overtime
- Deans Honorarium
- Head of School
- London Weighting Allowance
- On Call Payment
- Overseas Supplement
- Premium Bands
- Responsibility Allowance
- Royal Society Award
- Secondment Allowance
- Wardens Allowance
- Wellcome Trust Allowance
- Wellcome Trust Fellowship

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

To add an allowance, select **Add**. If the allowance you require is not listed please include this information in the comments section below (step 16).

Select the **Plan** (Allowance). The example shown is the addition of a London weighting. The screen will vary depending on the allowance selected. There will be on screen guidance to help. Select **OK** then **Continue**.
16. Add any comments and upload the completed Job Requisition Business Case form and New Appointee Information Form to the **Comments and Attachments** section then click **Submit**. Please also use this section to list any allowances not able to select in step 15, and use this to provide any supporting documentation/rationale for the allowance.

If more than one allowance is required click add to enter this and repeat the steps as above.
Rehire a previous employee

If the National Insurance Number matches one held for a previous employee and the Person Name matches the pending worker name, select the previous worker record and click **Continue**.

If the names do not match confirm the National Insurance Number is correct. If necessary, click **No match, add person** then **Continue** and return to follow the create a pending worker process.
1. Click **OK** to confirm you wish to create a new work relationship for this person.

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

   ![Check the boxes](image1.png)

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

   ![Enter When and Why](image2.png)

   a) **What's the way to create the work relationship?** – select **Add a Pending Worker**
   
   b) **Why are you adding a work relationship?** – select **Future Hire to fill vacant position**
4. Confirm the personal details are correct then click **Continue**.

Where necessary, click the edit icon to amend information.

5. Add or amend **Communication Info** as required then click **Continue**. Personal email address needs to be added as a work email for the rehire to access any preboarding tasks.
6. Add or amend **Address** details as required then click **Continue**.

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

15. In the **Employment Details** section,
   a. Make sure the Assignment Status is set to **Active – Payroll Eligible**
   b. Search for and select the relevant **Business Unit**
   c. Select the relevant **Assignment Category**
   d. Add the **Personal Job Title**
   e. For fixed term workers only, ensure the **Projected End Date** is completed. Click **Continue**
   f. Fill in all other relevant information as required for the contract
g. Then, press **Continue**

You must enter the all relevant details here as they pull through into the pending worker assignment details.

Follow the guidance for position management and request a new position or a position change to ensure there is adequate FTE available to appoint the new hire to.

Ensure you complete the Grade Ladder and Grade details to automatically pull the salary through into the Salary details. For the university grade ladder use UE07 for Grade 7. Off-scale salary codes end in an N i.e. UE7N.

For fixed term assignments, ensure you complete the Fixed Term Reason Code.

For Guaranteed Hours assignments set the working hours to 0 per week to calculate a 0 FTE, and use the additional assignment information in a later section to record the details.
For HESA Standard Occupational Classification information for 2019/2020 click [here](#).

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

For Guaranteed Hours:

- **Current Guaranteed Hours Start Date**
- **Guaranteed Hours End Date** – enter if GH contract is fixed-term
- **Number of Hours** - enter total number of hours for the contract
- **Number of Hours Period** - enter period over which the hours will be worked:
– Over period of current FTC
- Over Period of Current GHC
- Per Year
- Per Year Every Year
- Per Year Every Year over the duration of the FTC

e. If applicable, enter **Reason for No Hours:**
- Long Term Sick
- Maternity Leave/Shared Parental Leave
- Suspension of Contract for Agreed Reasons

**Annualised/Fractional Information**

17. In the **Maintain Managers** section, **Add** or **Edit** the line manager of the new hire as needed, then select **Continue.**
18. Click **Continue** in the **Work Relationship Info** section.

19. In the **Payroll Details** section select UoE Group in the **Payroll Frequency** section then select **University of Edinburgh** as the **Tax Reporting Unit**. Click **Continue**.

20. In the **Salary** section, use the **Salary Basis** dropdown to select **Annual Salary** then select **Continue**.
The salary amount should populate for all on-scale salaries. If this is an off-scale salary, populate the **Salary Amount** field as appropriate.

21. Update the **Compensation** section if any additional allowances are to be added. There are 14 allowances (see appendix) that can be selected, if the allowance you require is not listed please include this information in the comments section below. You can bypass this by clicking **Continue** if there is no allowance to add. To add an allowance, select **Add**.

22. **Select the ‘Plan’** (Allowance). The example shown is the addition of a London weighting. The screen will vary depending on the allowance selected and the in system eligibility criteria. There will be on screen guidance to help. Select **OK** then **Continue**.
If more than one allowance is required, click add to enter this and repeat the steps as above.
23. If required, **Add Direct Reports** by searching and selecting existing employees to report into the new hire then select **Continue**.

24. Add any comments and upload the completed Job Requisition Business Case form and New Appointee Information Form to the **Comments and Attachments** section then click **Submit**.

**Appendix**

Allowances configured for compensation section - If the allowance you need is not listed please add this to the comments section and use the attachments for any additional information/rationale.

- Acting Up Allowance
• Contractual Overtime
• Deans Honorarium
• Head of School
• London Weighting Allowance
• On Call Payment
• Overseas Supplement
• Premium Bands
• Responsibility Allowance
• Royal Society Award
• Secondment Allowance
• Wardens Allowance
• Wellcome Trust Allowance
• Wellcome Trust Fellowship