



## People and Money system

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

### School/Department Admin Guide - How to Add a Pending Worker

School/Department Admin

Estimated time to complete: 15 minutes

#### Before you start

Please familiarise yourself with the [Guide to Recruitment and Onboarding](#).

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

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

**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. Please follow the guide [‘How to allocate checklists and tasks’](#).

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.

Allowances (if applicable) must be added 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). Under Recruitment & Onboarding heading).

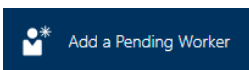
The **Default Expense Account Code** must be added for all pending workers. This enables users to submit any future expense claims. This will be captured within the approved Job Requisition Business Case Form.

In Brief...

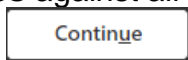
## Add a Pending Worker

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

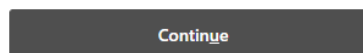
2. Select **Add a Pending Worker**



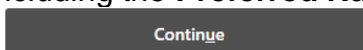
3. **Check the boxes** against all the info you would like to manage and then press **Continue**



4. Complete the **When and Why** section and click **Continue**

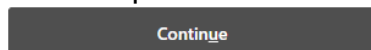


5. Complete the **Person Details** section including the **Preferred Name** and **National Insurance Number** (if known) and click **Continue**



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

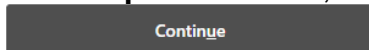
7. Complete the **Communication Info** section. A personal email address must be entered in both the personal email address and work email address field. Click **Continue**



8. Add **Address** details.

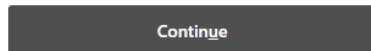
9. Complete the **citizenship info** section, adding the nationality of the candidate.

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

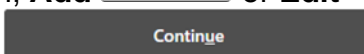


11. In the **Employment Details** section complete the mandatory fields (detailed below), add the **Personal Job Title**, fill in all other relevant information as required for the contract. For fixed term workers only, ensure the **Projected End Date** is completed. Please include the **default expense account code** details. Click **Continue**

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

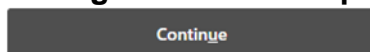


13. In the **Maintain Managers** section, **Add** or **Edit** the line manager of the new hire as needed, then select **Continue**

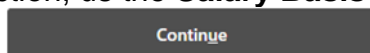


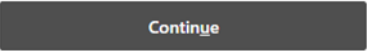
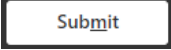
14. In the **Payroll Details** section, select UoE Group in the **Payroll Frequency** section then select **University of Edinburgh** as the **Tax Reporting Unit**. Then

select **Continue**

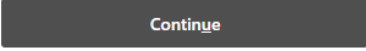

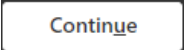
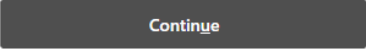
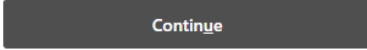
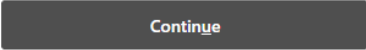
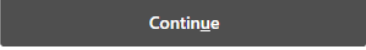
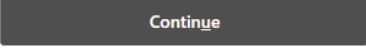
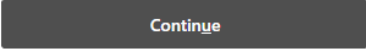


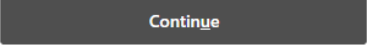
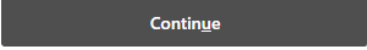
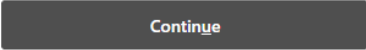
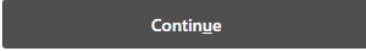
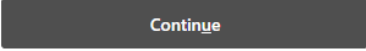
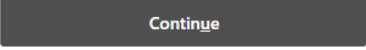


15. In the **Salary** section, use the **Salary Basis** dropdown to select **Annual Salary** then select **Continue**



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** 

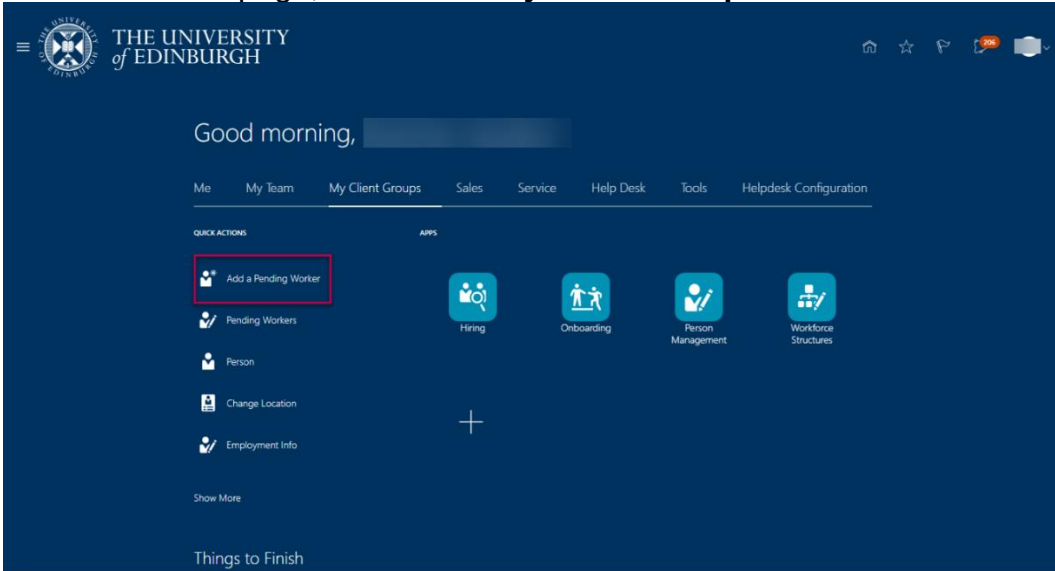
### Rehire a previous employee

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 (detailed below), add the **Personal Job Title**, fill in all other relevant information as required for the contract. For fixed term workers only, ensure the **Projected End Date** is completed. Please include the **default expense account code** details. Click **Continue**
10. In the **Additional Assignment Info** section, select the dropdown and add Guaranteed Hours or Annualised/Fractional contract information as required, then click **Continue** 
11. In the **Maintain Managers** section, **Add**  or **Edit**  the line manager of the new hire as needed, then select **Continue** 
12. Click **Continue**  in the Work Relationship Info section
13. In the **Payroll Details** section, select UoE Group in the **Payroll Frequency** section then select **University of Edinburgh** as the **Tax Reporting Unit**. then select **Continue** 
14. In the **Salary** section, use the **Salary Basis** dropdown to select Annual Salary then select **Continue** 
15. Complete the Compensation section should any 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** 

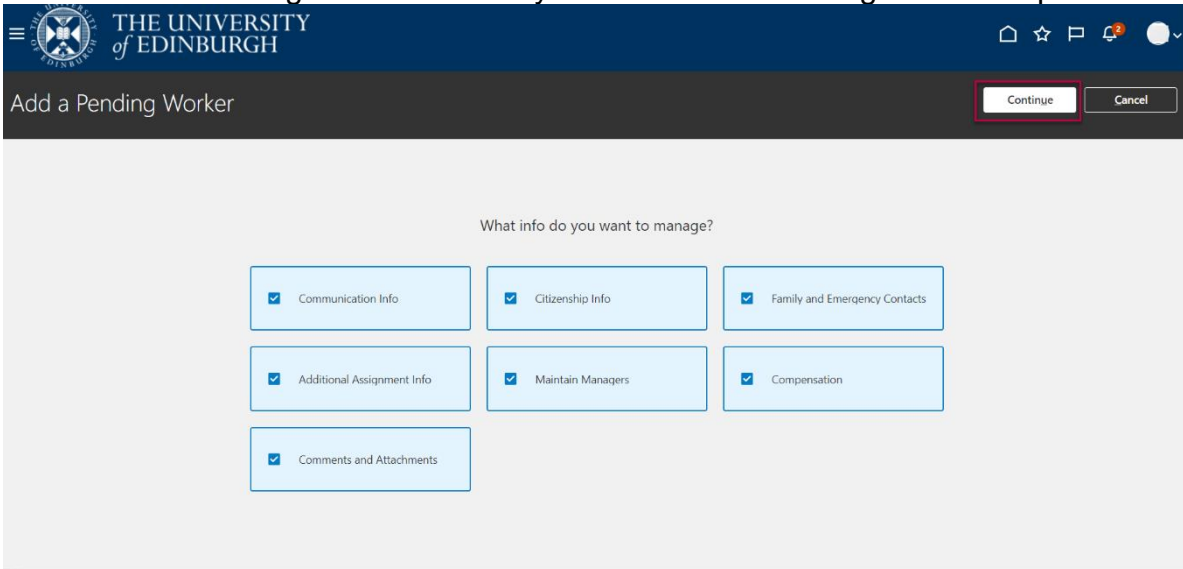
17. Add any comments and upload the completed Job Requisition Business Case form and New Appointee Information Form to the **Comments and Attachments** section then click **Submit** 

**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**.



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**.

THE UNIVERSITY of EDINBURGH

Add a Pending Worker

1 When and Why

\*When is the pending worker start date?  
01/03/2022

\*What's the way to add the pending worker?  
Add Pending Worker

\*Legal Employer  
University of Edinburgh

Why are you adding a pending worker?  
Future hire to fill vacant position

\*Proposed Worker Type  
Employee

Continue

2 Personal Details

Add a Pending Worker

2 Personal Details

Person Number  
Generated automatically

\*Last Name

Middle Name

Title  
Select a value

Preferred Name

\*First Name

Date of Birth  
dd/mm/yyyy

HESA Disability 1

Student Number

HESA disability 2

UOE\_MORAY\_HOUSE\_TERMS

HESA previous institution

STSS/GTC number

REF Unit of Assessment

HESA Staff Identifier

HESA Highest Qualification

UOE\_UUN

HESA previous employment

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, 3, 4
- HESA previous institution
- REF Unit of Assessment
- HESA Highest Qualification
- HESA previous employment
- Visitor Registration Number (Finance Use Only)

5. Click the **Add** button in the National Identifiers section, enter the **National Insurance Number** (if known), and then click **Continue**.

The screenshot shows a web form titled "Add a Pending Worker". At the top right, there are "Submit" and "Cancel" buttons. The form is divided into several sections:

- Date of Birth:** A text input field with a date format mask "dd/mm/yyyy" and a calendar icon.
- Student Number:** A text input field.
- UOE\_MORAY\_HOUSE\_TERMS:** A dropdown menu.
- STSS/GTC number:** A text input field.
- HESA Staff Identifier:** A text input field.
- UOE\_UUN:** A text input field.
- National Identifiers:** A section containing:
  - Country:** A dropdown menu with "United Kingdom" selected.
  - National ID Type:** A dropdown menu with "Select a value" selected.
  - + Add:** A button highlighted with a red box.

At the bottom of the form, there is a "Continue" button. Below the form, there is a section for "Communication Info" with a circled "3" icon.

Add a Pending Worker

Submit Cancel

STSS/GTC number

REF Unit of Assessment

HESA Staff Identifier

HESA Highest Qualification

UOE\_UUN

HESA previous employment

National Identifiers + Add

\*Country: United Kingdom

Issue Date: dd/mm/yyyy

\*National ID Type: National Insurance Number

Expiration Date: dd/mm/yyyy

\*National ID: MS763645

Place of Issue

Primary

Continue

3 Communication Info

The duplicate worker check runs against the National Insurance Number. If you receive a message regarding Potential Matches see the steps below.

## Checks you must carry out 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:

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-1332260)

Potential Matches

No match, add person

Person Name: James Brown

Legal Employer: University of Edinburgh

Person Type: Employee Casual

Business Unit: University of Edinburgh

Department: Academic and Student Administration - CAHSS

Assignment Number: E259419

Start Date: 8/03/2022

Country: United Kingdom

**Error**

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

OK Cancel

Continue

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-1332260)

Potential Matches

No match, add person

Person Name: James Brown

Legal Employer: University of Edinburgh

Person Type: Employee Casual

Business Unit: University of Edinburgh

Department: Academic and Student Administration - CAHSS

Assignment Number: E259419

Start Date: 8/03/2022

Person Job Title: Administrator (BI) (PAO - Administration)

Termination Date

Date of Birth: 1/03/1987

Location: 17 George Square

Work Email: gregpaye@yahoo.com

Country: United Kingdom

Continue

### Person Type = Employee

Expand the section for the duplicate and check the Person Type field, if this is 'Employee' the **termination date is blank** and the person name matches the pending worker name, you will need to raise a Service Request (Internal Transfer to Advertised Post) attaching the [Request for Transfer, Additional Post or Secondment Form](#) and the approved [Job Requisition Business Case](#).

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

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

OR

### Person Type = Employee Casual

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

The screenshot shows a web form titled "Add a Pending Worker". At the top right are buttons for "Save", "Submit", and "Cancel". A yellow warning banner reads: "If one of these people is the person you're adding, select the person. Else select no match. (PER-1332260)". Below this is a section titled "Potential Matches" with a radio button for "No match, add person". A second radio button is selected, showing a match for James Brown. The match details are as follows:

<b>Person Name</b> James Brown	<b>Personal Job Title</b> Administrator (B1) (PAO - Administration)
<b>Legal Employer</b> University of Edinburgh	<b>Termination Date</b>
<b>Person Type</b> Employee-Casual	<b>Date of Birth</b> 1/02/1997
<b>Business Unit</b> University of Edinburgh	<b>Location</b> 1-7 George Square
<b>Department</b> Academic and Student Administration - CAHSS	<b>Work Email</b> gregsayer@yahoo.com
<b>Assignment Number</b> E239419	<b>Country</b> United Kingdom
<b>Start Date</b> 6/03/2022	

At the bottom of the match details is a "Continue" button.

HR Operations will then reverse the termination and reenter 2 days before the hire date.

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

OR

### Person Type = Contingent Worker

If the Person Type =Contingent Worker **select 'No match'**, add person and continue with the add pending worker process. You must NOT merge the duplicate worker records or it may impact the continuous service date for the worker.



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

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

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

6. In the **Communication Info** section enter contact details for the new employee. A **personal email address** must be entered in both the personal email address and work email address field.

The screenshot shows the 'Add a Pending Worker' form. The 'Communication Info' section is highlighted. It includes a 'Phones' section with a 'Type' dropdown (Select a value) and an '+ Add' button. Below it is an 'Emails' section with a '+ Add' button. The 'Emails' section contains a dropdown for '\*Type' (Work Email), a text field for '\*Email', and date fields for '\*From Date' (10/11/2020) and '\*To Date' (dd/mm/yyyy). A 'Primary' checkbox is checked. A 'Continue' button is at the bottom of the section.

7. Add **Address** details. If not recorded here, the candidate is reminded to check and enter this information in a preboarding task however this information is required for payroll and pension purposes.

**Add a Pending Worker** Submit Cancel

① When and Why Edit

② Personal Details Edit

③ Communication Info Edit

**④ Addresses**

Country  
Select a value v

Continue

⑤ Citizenship Info

⑥ Family and Emergency Contacts

**8. Add citizenship info – select the nationality of the candidate from the drop down**

⑤ Citizenship Info + Add

Nationality  
Select a value v

Continue

Then select **citizenship status** and a start date (and end date if applicable). To add more than one nationality click add. Then **Click continue**

⑤ Citizenship Info + Add

Nationality  
United Kingdom v

Citizenship Status  
Active v

From Date  
dd/mm/yyyy v

To Date  
dd/mm/yyyy v

Continue

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

Add a Pending Worker Submit Cancel

3 Communication Info Edit

4 Addresses Edit

5 Citizenship Info Edit

6 Family and Emergency Contacts

Relationship Contact Type  
 Select a value

7 Employment Details

8 Additional Assignment Info

9 Maintain Managers

10. In the **Employment Details** section complete the fields marked with a \* as these are mandatory, others should be completed depending on contract type

7 Employment Details

Pending Worker Person Type

\*Proposed Person Type

\*Business Unit

Primary Assignment  
 Yes

Projected End Date

\*Position

\*Personal Job Title

\*Grade Ladder

\*Grade

Step

Department

\*Location

100% Off campus working (Approved flexible working only)

Worker Category

\*Assignment Category

Calculate FTE and headcount automatically

Working Hours

Derived Standard Working Hours  
 35 Weekly

FTE

Working as a Manager

Fixed Term Reason Code

NHS Honorary Contract

Contract Review Date

\*Research/Teaching&Research/Teaching Only

\*HESA Activity Standard Occupational Classification

\*HESA Level

HESA Reason for End of Contract

Clinical Increment Date

Off-Campus Working Days (Approved Flexible Working only)

\*Default Expense Account

Field Name	Guidance for completion
Pending Worker Person Type	Pending Worker

Proposed Person Type*	Employee
Business Unit*	Select relevant BU
Projected End Date	For fixed term contracts please provide
Position*	Please provide the position name, guidance on this is available in the Guide to Job Classifications and Position Management
Personal Job Title*	This automatically populates with the position name so it should be overwritten for a meaningful job title. This will also impact on correspondence e.g. contracts
Grade Ladder*	Ensure you complete the Grade Ladder and Grade details to automatically pull the salary through into the Salary details. For the university grade ladder use UE07 for Grade 7. Off-scale salary codes end in an N i.e. UE7N.
Grade*	As above
Step	Grade Step
Department	Select the relevant department
Location*	Location where employee will be based
Worker Category	Select the relevant worker category e.g Guaranteed Hours
100% Off campus working	Yes or No - Only to be updated to 'Yes' where it has been agreed that the employee will work 100% of time off campus as per the flexible working policy.
Assignment Category*	Select the appropriate from the dropdown, e.g open ended, fixed term
Working Hours	Defaults to 35 per week but can be amended, must be a weekly figure. For Guaranteed Hours assignments set the working hours to 0 per week to calculate a 0 FTE, and use the additional assignment information in a later section to record the details.
FTE	Automatically populates based on Working Hours
Working as a Manager	Yes/No
Fixed Term Reason Code	Must be provided for fixed term contracts.
NHS Honorary Contract	If applicable
Contract review Date	If applicable
Research/Teaching&Research/ Teaching only*	<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 - Non 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*	HESA Activity Standard Occupational Classification-select the appropriate option. For subsidiaries please select the code which matches closest the type of role. For subsidiaries this information will

	not be returned as part of the HESA submission For HESA Standard Occupational Classification information for 2019/2020 click <a href="#">here</a> .
HESA Level*	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. Note staff in subsidiaries should use 'XperthHR Level N' in all instances
Clinical Increment Date	If applicable
Off Campus Working Days (Approved Flexible Working Only).	If a Flexible Working arrangement agreed (as per the Flexible Working Policy) please enter the days of the week the employee will be working off campus, e.g. Monday and Friday every week. If they will be working set days off campus over a different pattern to weekly (e.g fortnightly) please provide the details in this section (e.g. every other Friday from home).  <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> .
Default Expense Account Code*	Must be added – please refer to the approved Job Requisition Business Case Form. Please note in most circumstances the default expense account code will be the same as the salary costing code. The default expense code cannot be split.

## 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	XperthHR level I	UE09, ECA8, AC3A, AC3B, ACN3, ACT3, AM3A, AM3B, AMN3, AMT3, ARW2, XM2A, XM2B	ARC ON SPINAL POINT 39, 40, 40, 44, 45, 46, 54, 58, 62, 66
J0	XperthHR level J	UE08, ECA7, AC2, AM2, ACN2, AMN2, ARW1, MC3, XM3A, XM3B, RCB3	ARC ON SPINAL POINT 37, 38, 49, 50, 60, 61, 65

K0	XpertHR 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	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	

## Default Expense Account Code

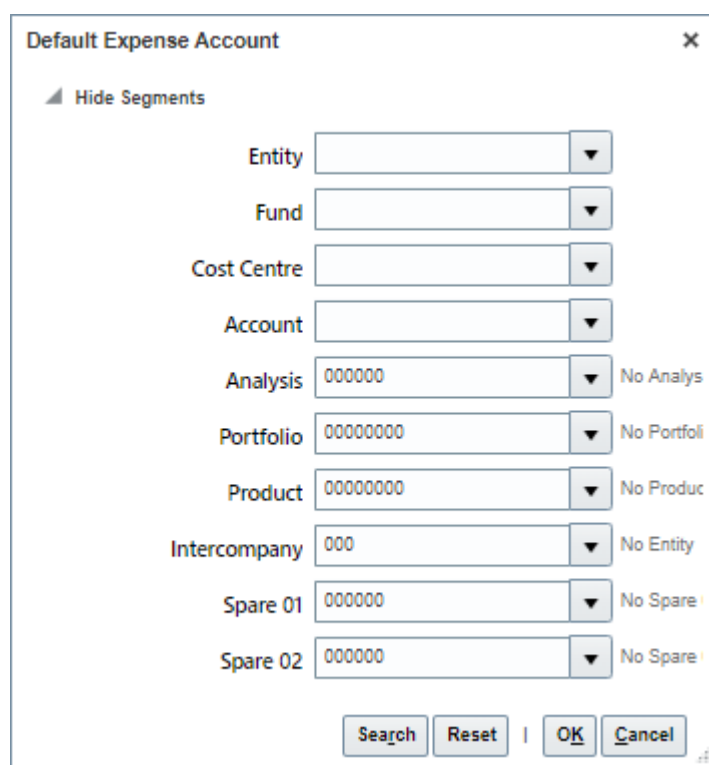
These are mandatory fields. Select the icon at the right of the field.

Default Expense Account



Complete all fields as per the details under 'Default Expense Account Code' on the approved Job Requisition Business Case form. Then press OK. The table below shows the default values, you must use the cost centre relating to the school or department.

	Code to use
Entity	110
Fund	110002
<b>Cost Centre</b>	<b>From the JRBC Form</b>
Account	2410
Analysis	000000
Portfolio	00000000
Product	00000000
Intercompany	000



Default Expense Account

Hide Segments

Entity  ▼

Fund  ▼

Cost Centre  ▼

Account  ▼

Analysis 000000 ▼ No Analys

Portfolio 00000000 ▼ No Portfoli

Product 00000000 ▼ No Produc

Intercompany 000 ▼ No Entity

Spare 01 000000 ▼ No Spare

Spare 02 000000 ▼ No Spare

Search Reset | OK Cancel

Then, press **Continue**

Note:

PM1061

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

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

**For Guaranteed Hours (please note the information entered here feeds the GH App)**

The screenshot shows the 'Add a Pending Worker' interface. The 'Additional Assignment Info' section is highlighted with a blue border. Inside this section, the 'Info Group' dropdown menu is open, showing options: 'Guaranteed Hours', 'Research Information for PURE', 'Guaranteed Hours', 'Annualised/Fractional information', and 'HESA Clinical (Contract)'. The 'Guaranteed Hours' option is selected and highlighted with a red box. To the right of the dropdown, there is a '+ Add' button, also highlighted with a red box. Below the dropdown, the text 'There's nothing here so far.' is displayed. At the bottom of the section, there is a 'Continue' button. The overall form has a dark header with 'Add a Pending Worker' and 'Submit' and 'Cancel' buttons.

#### 8 Additional Assignment Info

This is a detailed view of the 'Additional Assignment Info' form for 'Guaranteed Hours'. The 'Info Group' dropdown is set to 'Guaranteed Hours'. The form contains several input fields and dropdown menus:

- \*Current Guaranteed Hours Start Date:** A date input field with a calendar icon, showing 'dd/mm/yyyy'.
- Guaranteed Hours End Date:** A date input field with a calendar icon, showing 'dd/mm/yyyy'.
- Number of Hours:** A text input field.
- Number of Hours Period:** A dropdown menu.
- Reason For No Hours:** A dropdown menu.
- Declined the Offer of a Fractional Contract During this Period?:** A dropdown menu.

At the bottom right, there are 'OK' and 'Cancel' buttons. At the bottom center, there is a 'Continue' button.

- **Current Guaranteed Hours Start date field** - enter the same as the contract start date
- **Guaranteed Hours End date field** - enter the GH Period end date
- **Number of Hours field** - enter the minimum hours to be guaranteed in the initial GH period.



- **Number of Hours Period field** - select from one of the available drop down options (see [Appendix 2](#) for guidance and description)
- **Reason for No Hours** – do not enter anything here (HR Ops use only)
- **Declined the Offer of a Fractional Contract** – do not enter anything here (HR Ops use only)

## Annualised/Fractional Information

Add a Pending Worker Submit Cancel

8 Additional Assignment Info

Info Group: Annualised/Fractional information

Annualised/Fractional information

**HOURS\_TO\_BE\_WORKED\_SCHEDULED** OK Cancel

Number of Hours per week

Annual Leave Hours Percentage for annual leave

ANNIVERSARY\_START\_DATE Total Annualised Hours per Annum

dd/mm/yyyy Average Annualised Weekly Hours

End Date Fractional Period

dd/mm/yyyy v

Number of Weeks Per Year

Continue

9 Maintain Managers

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

The screenshot shows the 'Add a Pending Worker' form at step 9, 'Maintain Managers'. The form is titled 'Add a Pending Worker' and has 'Submit' and 'Cancel' buttons at the top right. The form is divided into several sections: 7 Employment Details, 8 Additional Assignment Info, 9 Maintain Managers, 10 Payroll Details, 11 Salary, and 12 Compensation. The 'Maintain Managers' section is highlighted with a blue border and contains a '+ Add' button and a 'Continue' button, both of which are highlighted with red boxes. Below the '+ Add' button, there is a list of managers. The first manager is Gretchen Sanders, Business School Administrator, with a 'Line Manager' role. A 'Continue' button is located below the list of managers.

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**.

The screenshot shows the 'Add a Pending Worker' form at step 10, 'Payroll Details'. The form is titled 'Add a Pending Worker' and has 'Save', 'Submit', and 'Cancel' buttons at the top right. The form is divided into several sections: 7 Employment Details, 8 Additional Assignment Info, 9 Maintain Managers, 10 Payroll Details, 11 Salary, and 12 Compensation. The 'Payroll Details' section is highlighted with a blue border and contains a 'Payroll Frequency' section with a dropdown menu set to 'UoE Group' and an 'Other Info' section with a 'Tax Reporting Unit' dropdown menu set to 'University of Edinburgh'. A 'Continue' button is located below the 'Other Info' section.

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

Add a Pending Worker Submit Cancel

9 Maintain Managers Edit

10 Payroll Details Edit

11 Salary

\*Salary Basis  
Annual Salary

Total Amount 33,797.00

\*Salary Amount  GBP Annually

Annual Salary 33,797.00 GBP (FTE 1)

New Salary **33,797.00** GBP Annually

Grade Ladder University Grade Ladder  
Grade Name UE07  
Grade Step UE07 - Step 1

Continue

12 Compensation

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

15. Update the **Compensation** section if any 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).

Add a Pending Worker

9 Maintain Managers Edit

10 Payroll Details Edit

11 Salary Edit

12 Compensation

+ Add

There's nothing here so far.

Continue

13 Comments and Attachments

**Select the 'Plan' (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**.

12 Compensation

OK Cancel

\*Plan  
London Weighting Allowance

\*Option  
London Weighting Allowance

\*Start Date  
09/02/2022

\*Periodicity  
Annually

Work Units Conversion Rule  
UoE Rate Annualized

Hours Worked

End Date  
 Ongoing

\*Amount  
3,000.00

Pay Value

Hide Plan Info

**Allowance Description**

Payable to those who, as a condition of employment, are required to normally work in London or parts of Greater London and as a consequence are required to live in London or within daily commuting distance.

**What information do I need to enter?**

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

The 'Amount' field defaults to 3,000.00 and is the annual amount the employee will receive. Do not override this value. The annual amount will be divided by 12 (months in the year) and paid in monthly instalments to the employee.

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

Continue

13 Comments and Attachments

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

The screenshot shows a web interface with a vertical list of steps: 1. When and Why, 2. Assignment, 3. Salary, and 4. Compensation. The 'Compensation' section is expanded and contains a table with two rows of allowance information. The first row is labeled 'Offered Plan' and the second is 'Existing Plan'. Each row includes details like 'RJ Car Allowance', '1200CC', and dates. A '+ Add' button is visible in the top right of the compensation section.

Plan Type	Allowance Name	Amount	Frequency
Offered Plan	RJ Car Allowance 1200CC 1/1/22 - Ongoing	150.00 USD	Recurring
Existing Plan	RJ Car Allowance 1200CC 1/1/20 - 12/31/21	100.00 USD	Recurring

The screenshot shows the 'Add a Pending Worker' form at step 13, 'Comments and Attachments'. The 'Submit' button is highlighted with a red box. The form includes sections for 'Comments' (a text area) and 'Attachments' (a dashed box with a cloud icon and the text 'Drag files here or click to add attachment').

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

Add a Pending Worker

M5763645

Primary

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

Potential Matches

No match, add person

<input checked="" type="checkbox"/> Person Name	Personal Job Title Tutor (CT) (ACAD - Teacher)
---	---

**Continue**

③ Communication Info

④ Addresses

⑤ Citizenship Info

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**.

Continue Cancel

What info do you want to manage?

<input checked="" type="checkbox"/> Communication Info	<input checked="" type="checkbox"/> Citizenship Info	<input checked="" type="checkbox"/> Family and Emergency Contacts
<input checked="" type="checkbox"/> Additional Assignment Info	<input checked="" type="checkbox"/> Maintain Managers	<input checked="" type="checkbox"/> Compensation
<input checked="" type="checkbox"/> Comments and Attachments		

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

of EDINBURGH

Create Work Relationship

Submit Cancel

1 When and Why

When is the work relationship start date?  
12/11/2020

Why are you adding a work relationship?  
Future hire to fill vacant position

Legal Employer  
University of Edinburgh

Proposed Worker Type  
Employee

\*What's the way to create the work relationship?  
Add Pending Worker

Continue

2 Personal Details

3 Communication Info

4 Addresses

- a) **What's the way to create the work relationship? – select Add a Pending Worker (if there is already a pending worker record please select add pending worker relationship)**
- b) **Why are you adding a work relationship? – select Future Hire to fill vacant position**

4. Confirm the personal details are correct then click **Continue**.

Create Work Relationship

DD Daffy Duck

Submit Cancel

1 When and Why Edit

2 Personal Details

Name

Last Name Duck First Name Daffy

Title Mr.

Biographical Info

Continue

3 Communication Info

4 Addresses

Where necessary, click the edit icon to amend information.

- 5. Communication Info** - Rehires may already have a work email address which you cannot amend. If this field is blank please add the personal email address. In the home email field please add the personal email address for the hire. Add or amend other Communication Info as required then click **Continue**.

The screenshot shows the 'Create Work Relationship' form for 'Daffy Duck'. The 'Communication Info' section is highlighted with a blue border. It contains a 'Phones' section with a '+ Add' button. Below it is a message 'There's nothing here so far.' with a small icon. The 'Emails' section has a '+ Add' button and two entries: 'Home Email' and 'Work Email'. The 'Work Email' entry is selected with a blue radio button and has an edit icon. A 'Continue' button is at the bottom of the section.

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

The screenshot shows the 'Create Work Relationship' form for 'Daffy Duck'. The 'Addresses' section is highlighted with a blue border. It contains a '+ Add' button and an entry for 'Home Address' which is selected with a blue radio button. The address details are: Argyle House, 3 Lady Lawson Street, EDINBURGH, EH3 9DR, UNITED KINGDOM. An edit icon is next to the entry. A 'Continue' button is at the bottom of the section. The 'Citizenship Info' section is partially visible below.



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

The screenshot shows a web form titled "Create Work Relationship". At the top right, there are "Submit" and "Cancel" buttons. The form is divided into several sections, each with a numbered icon and an "Edit" button:

- 3 Communication Info
- 4 Addresses
- 5 **Citizenship Info** (highlighted with a blue border)
- 6 Employment Details
- 7 Additional Assignment Info

Inside the "Citizenship Info" section, there is a table with the following data:

Nationality	From Date
United Kingdom	1/10/2020
Citizenship Status	To Date
Active	20/02/2024

Below the table is a "Continue" button. To the right of the table, there is an "Add" button and an "Edit" button. The "Add" button and the "Continue" button are highlighted with red boxes.

8. In the **Employment Details** section complete the fields marked with a \* as these are mandatory, others should be completed depending on contract type

## 6 Employment Details

**Pending Worker Person Type**

**\*Proposed Person Type**

**\*Business Unit**

**Primary Assignment**  
Yes

**Projected End Date**

**\*Position**

**\*Personal Job Title**

**\*Grade Ladder**

**\*Grade**

**Step**

**Department**

**\*Location**

**100% Off campus working**

**Worker Category**

**\*Assignment Category**

Calculate FTE and headcount automatically

**Working Hours**

**Derived Standard Working Hours**  
35 Weekly

**FTE**

**Working as a Manager**

**Fixed Term Reason Code**

**NHS Honorary Contract**

**Contract Review Date**

**\*Research/Teaching&Research/Teaching Only**

**\*HESA Activity Standard Occupational Classification**

**\*HESA Level**

**HESA Reason for End of Contract**

**Clinical Increment Date**

**\*Default Expense Account**

Field Name	Guidance for completion
Pending Worker Person Type	Pending Worker
Proposed Person Type*	Employee
Business Unit*	Select relevant BU
Projected End Date	For fixed term contracts please provide
Position*	Please provide the position name, guidance on this is available in the Guide to Job Classifications and Position Management
Personal Job Title*	This automatically populates with the position name so it should be overwritten for a meaningful job title. This will also impact on correspondence e.g. contracts
Grade Ladder*	Ensure you complete the Grade Ladder and Grade details to automatically pull the salary through into the Salary details. For the university grade ladder use UE07 for Grade 7. Off-scale salary codes end in an N i.e. UE7N.
Grade*	As above
Step	Grade Step
Department	Select the relevant department
Location*	Location where employee will be based

100% Off campus working.	Yes or No - Only to be updated to 'Yes' where it has been agreed that the employee will work 100% of time off campus as per the flexible working policy.
Worker Category	Select the relevant worker category e.g Guaranteed Hours
Assignment Category*	Select the appropriate from the dropdown, e.g open ended, fixed term
Working Hours	Defaults to 35 per week but can be amended, must be a weekly figure. For Guaranteed Hours assignments set the working hours to 0 per week to calculate a 0 FTE, and use the additional assignment information in a later section to record the details.
FTE	Automatically populates based on Working Hours
Working as a Manager	Yes/No
Fixed Term Reason Code	Must be provided for fixed term contracts.
NHS Honorary Contract	If applicable
Contract review Date	If applicable
Research/Teaching&Research/ Teaching only*	1 - Academic Contract that is teaching only 2 - Academic Contract that is research only 3 - Academic contract that is both teaching and research 4 - Non academic contract 9 - Academic Contract that is neither teaching nor research
HESA Activity Standard Occupational Classification*	HESA Activity Standard Occupational Classification-select the appropriate option. For subsidiaries please select the code which matches closest the type of role. For subsidiaries this information will not be returned as part of the HESA submission For HESA Standard Occupational Classification information for 2019/2020 click <a href="#">here</a> .
Level*	This is now a mandatory field, please use the <a href="#">table below</a> to select the appropriate Level according to the grade of the position being offered.
Clinical Increment Date	If applicable
Off Campus Working Days (Approved Flexible Working Only).	If a Flexible Working arrangement agreed (as per the Flexible Working Policy) please enter the days of the week the employee will be working off campus, e.g. Monday and Friday every week. If they will be working set days off campus over a different pattern to weekly (e.g fortnightly) please provide the details in this section (e.g. every other Friday from home).  <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>
Default Expense Account Code* (see below for further guidance)	Must be added – please refer to the approved Job Requisition Business Case Form. Please note in most circumstances the default expense account code will be the same as the salary

	costing code. The default expense code cannot be split.
--	---

## HESA LEVEL

STAFF LEVEL CODE	STAFF LEVEL DESCRIPTION	GRADES ASSIGNED TO STAFF LEVEL CODE	ADDITIONAL CRITERIA
A0	Vice-Chancellor/Principal/Head of Initiation	Principal only	
B0	UCEA level 2	Vice-Principal/University Secretary	
C1	UCEA level 3A	Report to run by HR to identify this grouping	
C2	UCEA level 3B	College Registrar	
D1	UCEA level 3/4A1	Report to run by HR to identify this grouping	
D2	UCEA level 3/4A2	Report to run by HR to identify this grouping	
D3	UCEA level 3/4A3	Report to run by HR to identify this grouping	
E1	UCEA level 4A	XM1	
E2	UCEA level 4B	Report to run by HR to identify this grouping	
F1	UCEA level 5A	AC4, AM4, ACN4, AMN4, ACT4, AMT4  UE10 / OTHS <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 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 37, 38, 49, 50, 60, 61, 65
K0	XpertHR 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	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	

## Default Expense Account Code

Select the icon at the right of the field

PM1061

Default Expense Account



Complete all fields as per the details on the approved Job Requisition Business Case form, or you can search for the appropriate values and select from a list of default options. Then press OK.

Default Expense Account ✕

▲ Hide Segments

Entity	<input type="text"/>	▼
Fund	<input type="text"/>	▼
Cost Centre	<input type="text"/>	▼
Account	<input type="text"/>	▼
Analysis	000000	▼ No Analys
Portfolio	00000000	▼ No Portfoli
Product	00000000	▼ No Produc
Intercompany	000	▼ No Entity
Spare 01	000000	▼ No Spare
Spare 02	000000	▼ No Spare

|

Then, press **Continue**

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

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

**For Guaranteed Hours (please note the information entered here feeds the GH App)**

Add a Pending Worker Submit Cancel

⑥ Family and Emergency Contacts Edit

⑦ Employment Details Edit

⑧ Additional Assignment Info

Info Group: Guaranteed Hours

Guaranteed Hours

Research Information for PURE

Guaranteed Hours

Annualised/Fractional information

HESA Clinical (Contract)

There's nothing here so far.

Continue

⑨ Maintain Managers

⑩ Payroll Details

⑧ Additional Assignment Info

Info Group: Guaranteed Hours

Guaranteed Hours

OK Cancel

\*Current Guaranteed Hours Start Date: dd/mm/yyyy

Guaranteed Hours End Date: dd/mm/yyyy

Number of Hours:

Number of Hours Period:

Reason For No Hours:

Declined the Offer of a Fractional Contract During this Period?:

Continue

- **Current Guaranteed Hours Start date field** - enter the same as the contract start date
- **Guaranteed Hours End date field** - enter the GH Period end date
- **Number of Hours field** - enter the minimum hours to be guaranteed in the initial GH period.
- **Number of Hours Period field** - select from one of the available drop down options (see [Appendix 2](#) for guidance and description)
- **Reason for No Hours** – do not enter anything here (HR Ops use only)
- **Declined the Offer of a Fractional Contract** – do not enter anything here (HR Ops use only)

## Annualised/Fractional Information

Create Work Relationship Submit Cancel

6 Employment Details Edit

7 Additional Assignment Info

Info Group: Annualised/Fractional information

Annualised/Fractional information

OK Cancel

*HOURS_TO_BE_WORKED_SCHEDULED	Number of Hours per week
Annual Leave Hours	Percentage for annual leave
ANNIVERSARY_START_DATE dd/mm/yyyy	Total Annualised Hours per Annum
End Date dd/mm/yyyy	Average Annualised Weekly Hours
Number of Weeks Per Year	Fractional Period

Continue

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

Create Work Relationship Submit Cancel

6 Employment Details Edit

7 Additional Assignment Info Edit

8 Maintain Managers

+ Add

EC Emma Cunningham  
Core Systems Training Consultant Line Manager Edit

Continue

9 Work Relationship Info

10 Payroll Details

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

The screenshot shows the 'Create Work Relationship' form with a dark header. The 'Work Relationship Info' section (step 9) is highlighted with a red border and contains a 'Continue' button. Other sections include 'Additional Assignment Info', 'Maintain Managers', 'Payroll Details', 'Salary', 'Compensation', and 'Add Direct Reports'. 'Submit' and 'Cancel' buttons are in the top right.

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

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

The screenshot shows the 'Create Work Relationship' form with the 'Salary' section (step 11) highlighted. The 'Salary Basis' dropdown is set to 'Annual Salary'. The 'Salary Amount' is 42,793.00 GBP Annually. The 'Grade Ladder' is University Grade Ladder, 'Grade Name' is UE08, and 'Grade Step' is UE08 - Step 2. The 'New Salary' is 42,793.00 GBP Annually. A 'Continue' button is highlighted with a red box. 'Submit' and 'Cancel' buttons are in the top right.



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

14. Update the **Compensation** section if any 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**.

The screenshot shows the 'Create Work Relationship' form for 'Daffy Duck'. The form is divided into several sections: '9 Work Relationship Info', '10 Payroll Details', '11 Salary', '12 Compensation', '13 Add Direct Reports', and '14 Comments and Attachments'. The '12 Compensation' section is highlighted with a blue border and contains a '+ Add' button and a 'Continue' button. A message in the center of the '12 Compensation' section reads 'There's nothing here so far.' with a small icon of a duck.

15. **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**.

12 Compensation

OK
Cancel

**\*Plan**

London Weighting Allowance

**\*Start Date**

01/03/2022

**End Date**

01/03/2022

Ongoing

**\*Periodicity**

Annually

**Work Units Conversion Rule**

UoE Rate Annualized

**Hours Worked**

**Pay Value**

**\*Amount**

3,000.00

Hide Plan Info

**Allowance Description**

Payable to those who, as a condition of employment, are required to normally work in London or parts of Greater London and as a consequence are required to live in London or within daily commuting distance.

**What information do I need to enter?**

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

The 'Amount' field defaults to 3,000.00 and is the annual amount the employee will receive. Do not override this value. The annual amount will be divided by 12 (months in the year) and paid in monthly instalments to the employee.

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

Continue

13 Comments and Attachments

If more than one allowance is required If more than one allowance is required click add to enter this and repeat the steps as above

1 When and Why
Edit

2 Assignment
Edit

3 Salary
Edit

4 Compensation
+ Add

RJ Car Allowance 120000 1/1/22 - Ongoing	150.00 USD   Recurring	<span>Edit</span>
RJ Car Allowance 120000 1/1/20 - 12/31/21	100.00 USD   Recurring	<span>Edit</span>

Show Prior Compensation

Offered Plan

Existing Plan

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

The screenshot shows the 'Create Work Relationship' form with the 'Add Direct Reports' step (13) highlighted. A search bar labeled 'Search for people to add as reports' contains the text 'narayan'. Below the search bar is a table with the following data:

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

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**.

The screenshot shows the 'Create Work Relationship' form with the 'Comments and Attachments' step (14) highlighted. The 'Submit' button in the top right corner is highlighted with a red box. The form contains a 'Comments' text area and an 'Attachments' section with a dashed box and the text 'Drag files here or click to add attachment'.

Once approved please remember for rehires to allocate the generic preboarding checklist. Please follow the guide [‘How to allocate checklists and tasks’](#).

Appendix 1

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

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

Each should be used in the following scenarios:

Option	Description	When to use
Over Period of Current GHC	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	Minimum hours to be guaranteed for full duration of the current	<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</li> </ul>

	fixed term contract.	<p>offer Additional Information screen</p> <ul style="list-style-type: none"> <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>
Per Year	The minimum hours to be guaranteed for one GH Period.	<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 31/8/2024</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>
Per Year, Every Year for (use with open ended contracts)	The minimum hours to be guaranteed are to be the same minimum hours for each GH Period, indefinitely	<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>
Per Year/Every Year-Over Dura/FTC	The minimum hours to be guaranteed are to be the same for each GH Period for	<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</li> </ul>

	<p>the full duration of the fixed term employment contract related to that assignment.</p>	<p>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.</p> <ul style="list-style-type: none"> <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>
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