People and Money system

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<table>
<tr><td>

School or Department Admin- How to request a contract to be generated

School or Department Admin

Estimated time to complete: 5 minutes
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This guide will cover how to complete the Request Contract task. The fields in this tracker will be used to determine the clauses that appear in the employment contract. It is essential to accurately record the outcomes of pre-employment checks in this tracker. Marking the task complete will notify HR Operations that the contract should be generated, so only do this when it is ready to be generated.

Before you start

1. Ensure evidence of Right to Work Checks have been uploaded to documents of record and the task marked as complete in the preboarding checklist (this is not required if internal transfer, additional post or secondment).
2. Agree a start date.
3. Agree the work schedule (working pattern) that should be assigned to the employee's record. This is applicable to all types of hire; every employee must have a work schedule attached to their record and for each assignment they hold with the university. Please see the Work Schedule Calculator for information.
4. Note any **Allowances** that should be included in the contract and paid to the employee from their start date, these **MUST** be added to the request contract task if applicable.
5. Add any additional information to the comments and attachments. Please note for Guaranteed Hours contract to note the GH start and end date in the comments section.

<table>
<tr><td>In Brief…</td></tr>
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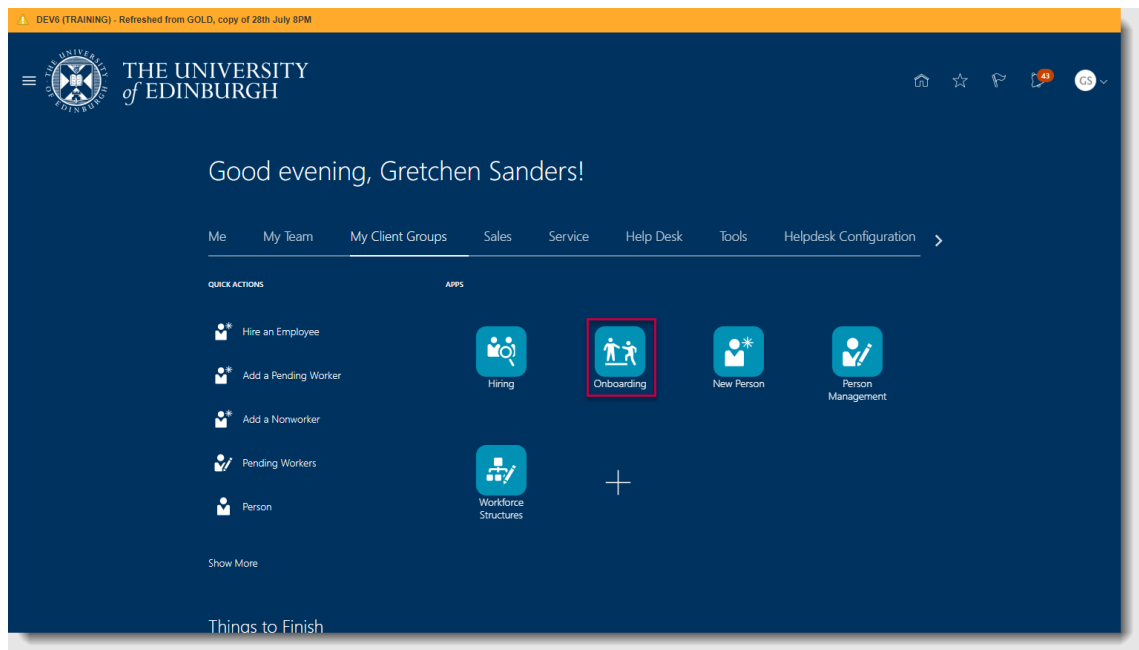This is a simple overview of the process.

1. Navigate to **My Client Groups**, then select **Onboarding**

2. Locate and select the **Request Contract** task for the relevant new hire.
3. Complete the relevant fields then select **Complete**

For detailed guidance, see the next section.

In Detail…

1. Navigate to **My Client Groups**, then select **Onboarding**

2. Locate and select the **Request Contract** task for the relevant new hire.
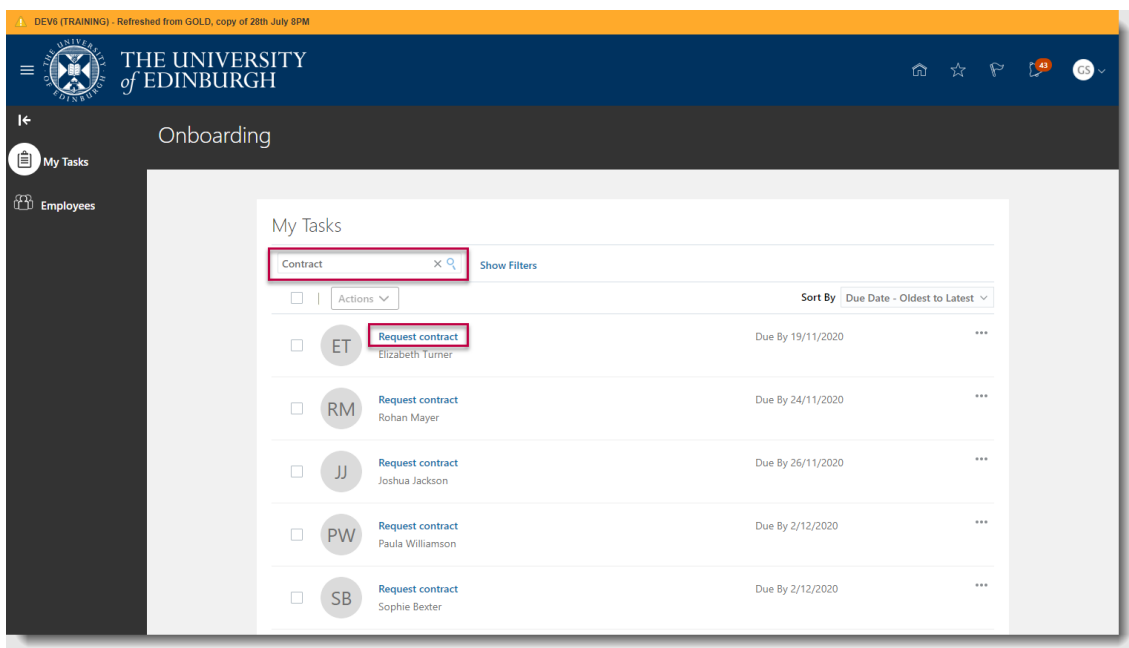
3. Complete the relevant fields then select **Complete. Please note it is important to provide details of any allowances to be included in the contract at this stage.** For more details on the information required in each field see the [Appendix](#)

Has PVG or overseas criminal record check been received (If applicable)?

○ No
○ Yes
● None

Has counter terrorism check been received (If applicable)?

○ No
○ Yes
● None

Has certification of specialist registration been received (If applicable)?

○ No
○ Yes
● None

Has occupational health clearance been received (If applicable)?

○ No
○ Yes
● None

Youth/Student Employment

○ Graduate Trainee
○ Modern Apprentice
○ Student Employee
● None

*Non Independent Researcher

○ NO
○ YES

Total number of hours for period (GH only)

[   ]

Period hours cover (GH only)

○ Over Period of Current GHC
○ Over Period of current FTC
○ Per Year
○ Per Year, Every Year
○ PerYear/EveryYear-OverDura/FTC
● None

Annually Reviewed (GH only)

○ No
○ Yes
● None

Number of hours per year (Annualised/Fractional only)

[   ]

Number of weeks per year (Fractional only)

[   ]

Term time only (Annualised/Fractional only)

○ No
○ Yes
● None

Average weekly working hours (Annualised only)

[   ]

Details of allowances to include in contract

[   ]

Use the comments and attachments section to provide further additional information for HR Operations.
If the hire is a Guaranteed Hours employee please ensure you provide the GH Start and End Date in the comments section, along with completing the relevant GH fields above.

Comments ⌃

Attachments ⌃

⬆ Drag files here or click to add attachment ⌄

Appendix

Fields with * denote that they are mandatory

Field Name	Description	Options
*Start Date	First date of employment	Date format either entering by typing or clicking on the calendar.
*Work Schedule	Allocated work schedule	Use the work schedule calculator to generate the pattern and select this from the drop-down menu. If the pattern you need is not listed, use the closest match AND please provide the work schedule in the 'Details of Work Schedule if not listed' field to provide the Work Schedule required.
Details of work schedule if not listed	Used to enter a work schedule not listed	Use the work schedule naming convention to provide details of a work schedule not listed above.
*Will the person be working abroad or require overseas working	Used to indicate if the worker will be based overseas	Yes/No
*Have all requested references been returned?	Used to indicate if the contract will be issued subject to references	Yes/No
*Contact number for Hiring Manager	To capture contact details for the new hire to discuss the contract	Enter the number (free text)
*Are there any remaining right to work documents to verify?	Indicates status of right to work	Yes/No

Disclosure Scotland or overseas criminal record check received (If applicable)?	Indicates the status of check	Yes/No/None By default non mandatory fields have "none" selected. Only specify "Yes" or "No" if this check applies, otherwise leave "None" selected.
Has PVG or overseas criminal record check been received (If applicable)	Indicates the status of check	Yes/No/None By default non mandatory fields have "none" selected. Only specify "Yes" or "No" if this check applies, otherwise leave "None" selected.
Has counter terrorism check been received (If applicable)?	Indicates the status of check	Yes/No/None By default non mandatory fields have "none" selected. Only specify "Yes" or "No" if this check applies, otherwise leave "None" selected.
Has certification of specialist registration been received (If applicable)?	Indicates the status of check	Yes/No/None By default non mandatory fields have "none" selected. Only specify "Yes" or "No" if this check applies, otherwise leave "None" selected.
Has occupational health clearance been received (if applicable)?	Indicates the status of check	Yes/No/None By default non mandatory fields have "none" selected. Only specify "Yes" or "No" if this check applies, otherwise leave "None" selected.
Youth/Student Employment	Youth/Student Employment flag	1) Graduate Trainee 2) Modern Apprentice 3) Student Employee 4) None By default non mandatory fields have "none" selected. Only specify another option if this is a Youth/Student Employment post.
*Non-Independent Researcher	Non-Independent Researcher Flag	Yes/No
Total number of hours for period (GH only)	Hours for the period	Enter the number (free text)
Period Hours Cover (GH only)	Period that hours above covers	1) Over period of Current GHC 2) Over period of current FTC 3) Per Year 4) Per Year, Every Year 5) Per Year, Every Year – over Duration of FTC 6) None By default non mandatory fields have "none" selected. Only specify another option if this is for GH contract, otherwise leave "None" selected.
Annually Reviewed (GH only)	Is the GH contract reviewed annually?	1) No 2) Yes 3) None

		By default non mandatory fields have "none" selected. Only specify another option if this is for GH contract, otherwise leave "None" selected.
Number of hours per year (Annual/Fractional Only)	Hours to be worked per year for annualised/fractional staff	Enter the number (free text)
Number of weeks per year (fractional only)	Number of weeks per year	Enter the number (free text)
Term Time Only (Annualised/Fractional only)	Are the hours worked term time only?	1) No 2) Yes 3) None By default non mandatory fields have "none" selected. Only specify another option if this is for Annualised/ Fractional contract, otherwise leave "None" selected.
Average weekly working hours (Annualised only)	Average weekly working hours for annualised staff	Enter the number (free text)
Details of Allowances	Records any allowances to be applied to the contract	Please provide details of any **allowances** to be included in the contract and paid to the employee from start date. If the approval for the allowance was not included in the original Job Requisition Business Case please ensure appropriate approval is attached. If the costing codes for this allowance differ from the employee's salary codes please also specify this.
Comments	Any additional information relating to the hire	If the hire is a Guaranteed Hours employee please ensure you provide the GH Start and End Date in the comments section, along with completing the relevant GH fields above.
Attachments		

Work Schedule Naming Convention