People and Money system

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GH Administrators Guide- How to Perform GH Refreshes

Please make sure you refer to the Guide for Guaranteed Hours for background information on the end-to-end process and off system steps

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Notes

The GH Refresh process is used to guarantee a minimum number of hours for a GH assignment for the forthcoming GH period. The result of the GH refresh process is that GH employees will receive a letter issued directly from the system to the employee’s ‘work’ email address, guaranteeing that they will be offered a certain number of hours over a defined period.

The GH Refresh is processed by the GH Administrator in the Guaranteed Hours App in People and Money. For information on the wider process, including off system steps, please refer to the Guide to Guaranteed Hours

Use the process described in this guide to guarantee hours to any existing employee on a Guaranteed Hours contract. Do not use this process if the employee has a new GH contract. When a GH employee is recruited, their guarantee of hours for the initial GH period is specified in their contract.
If your GH employee is employed on a Fixed Term contract that needs to be extended, you must process a contract extension prior to adding the GH refresh hours in the GH app in People and Money. Follow the Change Assignment process for each individual as per the Guide to Job Changes. Please ensure you provide the EUCLID immigration screenshot and Semester Term Dates for Tier 4 Students in the Justification for Change section of your request.

If there is a reason for not guaranteeing hours over the forthcoming GH period, GH Administrators can update GH details for the GH assignment via the Refresh screen, indicating the reason for no hours. GH Administrators can also terminate GH assignments via the Refresh screen.

Data for all GH assignments is updated in the Guaranteed Hours App every 15 minutes. As the data is live, GH Administrators can perform GH Refreshes at any time of year, in line with business needs.

**In Brief...**

**GH Refresh**

1. Access the GH Refresh screen
2. Click on the **Action** button next to the assignment for which you want to guarantee hours
3. From the **Action to be Taken** menu select “GH Refresh”
4. From the **HR Action** field select “GH Refresh”
5. From the **HR Action Reason** field select “GH Refresh”
6. The **GH Start** date is auto populated to begin the day after the previous GH period
7. Enter the new **GH End** date
8. Enter the number of **Guaranteed Hours** allocated to the assignment
9. Select the applicable **Number of Hours Period** from the menu
10. If required, enter supporting text in the **Comments** field
11. Click **Submit**

For detailed guidance, see the [next section](#).

**Update to GH Details**

1. Access the GH Refresh screen
2. Click on the **Action** button next to the assignment for which you want to record that no hours will be guaranteed
3. From the **Action to be Taken** menu select “Update to GH Details”
4. From the **HR Action** field select “Update to GH Details”
5. From the **HR Action Reason** field select “Update to GH Details”
6. The **GH Start** date is auto populated to begin the day after the previous GH period
7. Enter the new **GH End** date
8. Select the applicable **Reason for No Hours** from the menu
9. If required, enter supporting text in the **Comments** field
10. Click **Submit**

For detailed guidance, see the [next section](#).
**Terminations**

There are 2 options within the module to choose from when you wish to terminate a GH assignment:

**Termination:** to be used if the employee has only one assignment and they are leaving the University

**End Assignment:** to be used if you wish to end one assignment, where an employee holds multiple assignments

**Termination:**

1. Access the GH Refresh screen
2. Click on the **Action** button next to the assignment for the employee you want to terminate
3. From the **Action to be Taken** menu select “Termination”
4. From the **HR Action** field select the appropriate option
5. From the **HR Action Reason** field select the appropriate option
6. Enter the **Termination Date**
7. Enter the **Notification Date**
8. Select the applicable **HESA Reason for End of Contract** from the menu
9. Select the **HESA Location After Leaving**
10. Select the **HESA Activity After Leaving**
11. If required, enter supporting text in the **Comments** field
12. Click **Submit**

For detailed guidance, see the [next section](#).

**End Assignment:**

1. Access the GH Refresh screen
2. Click on the **Action** button next to the assignment you want to end
3. From the **Action to be Taken** menu select “End of Assignment”
4. From the **HR Action** field select the applicable “End Assignment” option
5. From the **HR Action Reason** field select the applicable option
6. Enter the **Assignment End** date
7. Select the applicable **HESA Reason for End of Contract** from the menu
8. If required, enter supporting text in the **Comments** field
9. Click **Submit**

For detailed guidance, see the [next section](#).
To Access the GH Refresh Screen:

1. From the Home page, click the Guaranteed Hours tab.

2. Click the Guaranteed Hours app.
3. After a few moments, the Guaranteed Hours App opens in a separate tab. Click the GH Refresh button in the navigation bar on the left.

The GH Refresh screen opens and displays data for all GH employees' assignments in your area of responsibility. By default, the report will sequence the data by GH End Date, with the GH assignment which needs to be actioned soonest at the top of the list.

4. Click on the Action button next to the applicable assignment.
On this screen there are various actions that can be carried out against an assignment. These are:

- GH Refresh
- Update to GH Details
- Termination
- End of Assignment

**GH Refresh**

1. In the GH Refresh Action window, click on the *Action to be Taken* down arrow and select *GH Refresh* from the menu.
Additional fields are displayed to complete.

2. From the **HR Action** field select “GH Refresh”.
3. From the **HR Action Reason** field select “GH Refresh”.
4. The **GH Start** date is auto populated to begin the day after the previous GH period (i.e. the day after the previous GH End date).
5. Enter the new **GH End** date. This will typically be a calendar year from the start date, but you can create a GH period of any length, according to your business needs. The format required is DD-MON-YEAR.
6. Click into the **Guaranteed Hours** field and enter the number of hours allocated to the assignment.
7. Select the applicable **Number of Hours Period** from the menu. See below for more details.

**Number of Hours Period** will have an impact on the wording that goes into the letter that is automatically issued to the employee.

They should be used in the following scenarios:

- **Per Year/Every Year/OverDura/FTC** – The minimum hours to be guaranteed are to be the same for each GH Period, for the full duration of the fixed term employment contract related to that assignment.
- **Over Period of Current GHC** – Minimum hours to be guaranteed for full duration of contract e.g. over the 2 year fixed term contract.
- **Over Period of Current FTC** – Minimum hours to be guaranteed for full duration of the current fixed term contract
- **Per Year** – The minimum hours to be guaranteed for one GH Period.
- **Per Year, Every Year** – The minimum hours to be guaranteed are to be the same minimum hours for each GH Period, indefinitely (usually used for open-ended assignments).
8. If required, enter supporting text in the **Comments** field.

9. If you are ready to submit the action, jump to step 12 to continue.
10. If you are not ready to submit, click **Save** and the action will be saved until you are ready to submit it.

11. To open a saved action, click the **Action** button next to the applicable employee and make the required amendments.
An action with the GH Status of "Saved" can be opened, edited, or submitted by any of the GH Administrators in your area of responsibility if required.

12. Click the **Submit** button and the action is submitted in the system.

If the employee is not on a Tier 4 or Student visa, the transaction will be auto approved. If the employee is on one of these visa types, it will have to be approved by HR.

If auto-approved, the GH Status is updated to “Approved.” Once approved by HR this will also happen.
Following approval (either automatic or by HR), the GH Status of the action is updated to “Interfaced” - this could take up to 15 minutes to show.

The following morning a GH refresh letter is issued from the system direct to the employee’s ‘work’ email address to confirm the new minimum guaranteed offer of hours. Details of the letter can be found in the Guide to Guaranteed Hours

Once the entire refresh process has been completed (normally after 15 minutes), the details of the ‘old’ and new GH periods will appear on the ‘GH Periods’ report.

**Update to GH Details**

In exceptional circumstances, an employee may be unable to work, and it has been agreed that they will not be offered any hours for a period of time, for example if they will be off work sick long term or are on maternity leave. ‘Update to GH Details’ can be used to record that no hours will be guaranteed over a specified period.

1. In the GH Refresh Action window, click on the **Action to be Taken** down arrow and select **Update to GH Details** from the menu.
2. From the **HR Action** field select “Update to GH Details”.
3. From the **HR Action Reason** field select “Update to GH Details”.
4. The **GH Start** date is auto populated to begin the day after the previous GH period (i.e. the day after the previous GH End date).
5. Enter the new **GH End** date.
6. Select the applicable **Reason for No Hours** from the menu. There are 3 options within this menu:
   - Maternity Leave/Shared Parental Leave
   - Long Term Sick
   - Suspension of Contract for Agreed Reason
7. Selection of any of these options will not feed into any other process such as
maternity or sickness absence. This field is designed to be populated for reporting purposes, and the expectation is that the GH Administrator entering this is doing so because they are aware of another HR process or discussions concerning availability.

8. If required, enter supporting text in the **Comments** field. It is advisable to input as much information as is known about why the employee will not be guaranteed any hours.

9. If you are ready to submit the action, jump to step 11 to continue.

10. If you are not ready to submit, click **Save** and the action will be saved until you are ready to submit it.

11. To open a saved action, click the **Action** button next to the applicable employee and make the required amendments.

An action with the GH Status of “Saved” can be opened, edited, or submitted by any of the GH Administrators in your area of responsibility if required.

12. Click the **Submit** button and the action is submitted to HR for Approval

**Note**: No letter is sent to the employee when you do an Update to GH Details.

**Terminations**

There are 2 options within the module to choose from when you wish to terminate a GH assignment:

**Termination**: to be used if the employee has only one assignment and they are leaving the University.
**End Assignment:** to be used if you wish to end one assignment, where an employee holds multiple assignments

If you are not sure how many assignments an employee holds, click on their name within the Refresh screen and a screen will pop up with details of all their assignments, including any non-GH assignments.

If an employee holds multiple assignments, you will not be able to end the primary one. It may not be possible to know which of an employee’s assignments the primary one is. If you attempt to end an assignment and receive an error saying this, you will either need to end the non-primary assignment first (if it is ending), or you will need to contact HR Ops to have the primary assignment switched to a different assignment. You should do this via a Service Request.

**Termination:**

An error will occur if you attempt to terminate a GH employee who has multiple assignments. You can only use the ‘Termination’ option if the employee has one assignment only.

1. In the GH Refresh Action window, click on the **Action to be Taken** down arrow and select **Termination** from the menu.
Additional fields are displayed to complete.

Full explanations of all drop down menu options can be found in the appendix section of the ‘How to Process Terminations - Manager’ guidance. This includes Termination actions and action reasons, as well as an explanation of all HESA codes.

2. From the HR Action field select the appropriate reason.
3. From the HR Action Reason field select the appropriate option.
4. Enter the Termination Date.
5. Enter the Notification Date.
6. Select the applicable HESA Reason for End of Contract from the menu.
7. Select the HESA Location After Leaving.
8. Select the HESA Activity After Leaving.
9. If required, enter supporting text in the Comments field.
10. If you are ready to submit the action, jump to step 13 to continue.
11. If you are not ready to submit, click Save and the action will be saved until you are ready to submit it.
12. To open a saved action, click the Action button next to the applicable employee and make the required amendments.

An action with the GH Status of “Saved” can be opened, edited, or submitted by any of the GH Administrators in your area of responsibility if required.

13. Click the Submit button and the action is submitted to HR for Approval.
**Note**: HR must approve all terminations, so that they can make some essential checks before it is committed to the employee record.

**End Assignment:**

If an employee has multiple assignments follow the steps below to end one of them.

1. In the GH Refresh Action window, click on the **Action to be Taken** down arrow and select **End of Assignment** from the menu.

   ![GH Refresh Action Window](image)

   Additional fields are displayed to complete.

   ![Additional Fields](image)
2. From the **HR Action** field select the applicable “End Assignment” option.
3. From the **HR Action Reason** field select the applicable option.
4. Enter the **Assignment End** date.
5. Select the applicable **HESA Reason for End of Contract** from the menu.
6. If required enter supporting text in the **Comments** field.
7. If you are ready to submit the action, jump to step 10 to continue.
8. If you are not ready to submit, click **Save** and the action will be saved until you are ready to submit it.
9. To open a saved action, click the **Action** button next to the applicable employee and make the required amendments.

An action with the GH Status of “Saved” can be opened, edited, or submitted by any of the GH Administrators in your area of responsibility if required.

10. Click the **Submit** button and the action is submitted to HR for Approval

**Note:** HR must approve all endings of assignments, so that they can make some essential checks before it is committed to the employee record.
## Glossary

### System Report Columns

<table>
<thead>
<tr>
<th>Column Heading</th>
<th>Description</th>
</tr>
</thead>
</table>
| GH Status      | Saved – Changes have been saved and await submission.  
                 Submitted – Changes have been submitted and await approval  
                 Rejected – Changes have been rejected. These can be reviewed and resubmitted  
                 Approved – Changes have been approved and await being interfaced  
                 Interfaced – Changes have interfaced successfully  
                 Failed – Something has gone wrong during the interface process |
| Previous GH Status | If an action has been taken previously, the previous status will be shown (as above). |
| Interface Status | A circle will display with the colour indicating the interface status once approved:  
                  Blue – Being processed  
                  Green – Successfully interfaced  
                  Red – Failed  
                  Grey – Not yet interfaced  
                  Interfaced means that the data has transferred into the core P&M system (since the GH module is a ‘bolt on’ piece of software) |
| Interface Messages | Displays the number of messages received when interfaced. Clicking this displays a modal window which provides text explanations of why the interface has error-ed. |