

Adding a New Employee (Casual Staff)

EPM Connect Guide



Document Control

Document Overview: This document outlines the step-by-step process for adding a new casual employee to EPM Connect.

Classification: Public

Document ID: EPMC033

Author: Lauren McGuire, Product Manager, Product Management

Version: 2.1

Date of Last Review: 23rd October 2025

Last Reviewed by: Keren Prior, Director of Operational Excellence

Date of Next Review: 23rd October 2026

Document Approval

The Director of Operational Excellence shall review this guide annually and shall determine whether any further changes need to be made prior to approval.

This document was approved by Keren Prior, Director of Operational Excellence on 23rd October 2025 and is issued on a version-controlled basis under her signature.

Document History

Date of Change	23 rd October 2025
Summary of Change	Changes to Add a Job Role and Salary Information sections.
New Version Number	v2.0
Changes to be notified to	Director of Operational Excellence

Contents

Add a new employee	3
Personal Information	6
ID & Other Checks	7
Pre-employment Checks	7
Payslips & Statements	7
Employee Documents	8
Audit Trail	8
Employment Record	8
Add Job Role	9
Job Information	10
Salary Information	11
Pension	12

Add a new Employee

All current employees will be added during implementation. However, any new employees can be added to the module either as individual employees via **Add Employee** or en masse via **Import Employees**.

Important

The first seven tabs relate to the employee as a whole. In order for EPM to manage payroll and HR effectively, the fields within **Personal Information** should be completed.

The seven tabs displayed within the lower half of the page relate to the specific job role selected within the **Select Job Role** drop-down menu.

Once Personal information has been completed you will need to **Add a job** and then complete the **Job Information** tab, **Salary Information** tab and where relevant the **Additions and Deductions** tab.

The information within the remaining tabs is not required, however we recommend completing as much of this information as possible in order to maximise reporting and analytics.

Add new employee

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Click **Add Employee**. A new **Create Employee Record** page is displayed.
4. Complete the employee details.

Title, Forename, Surname, Legal Gender for HMRC, Date of Birth, Marital Status and NI Number are mandatory fields.

User Link

1. If the employee is a returning employee, select a user from the **Link to Existing User** drop-down menu.

Previous and archived employees will be recognised in the system if the email address is the same and can be linked to the previous employee record.

Important

If the employee has already worked within the school or another school within the Trust, please ensure your Payroll Team have been informed, as this may affect their payroll.

2. If the employee is not already a user, type an email in the **Enter New User Email** text box.
The **New User Email** should be the user's work email address and unique, i.e. not a group email.
3. From the **User Groups** drop-down menu, select all user groups that apply.
User groups can be used to send tasks to groups of employees and manage bulk actions. User groups are managed by the Implementation Team and a list of user groups can be viewed within the **Adding Users and Permissions in EPM Connect Guide**.

Pre-Employment Checks

ID, DBS and **Right to Work** checks are mandatory for employees and will automatically appear as checks to be completed within the Pre-Employment Checks section. You can select from any of the additional checks listed and add other checks not listed within **Employee Settings**.

1. Within the **Pre-Employment Checks** section, click the **+ -** button. The section expands.



2. Select the checks which should be considered for this employee.

Only the checks selected will appear within the **Pre-Employment Checks** section of the **Employee Record**. Other checks not listed can be added within **Employee Settings**.

Employment Record

In the **Employment Record** section, **Employment Start Date** is a mandatory field for Payroll integration.

Once a **Start Date** is added this employee becomes a **New Starter** within Payroll. Once **Start Date** and **Payroll Link** have been processed by the payroll, they will become non-editable fields.

1. In the **Start Date** field, select a start date.
2. From the **Payroll Link** drop-down menu, select the property.

Payroll link options will display all payrolls available within this property/school, for example ABC Academy Support or ABC Academy Teaching.

Important

This field must be completed. If the **Payroll Link** field is not completed the employee will not be included in the Payroll. This applies to Payroll customers only.

3. In the **End Date** field, select an end date if known/applicable.
This should only be used for **Fixed Term** contracts.
4. From the **Employment Type** drop-down menu, select **Employee** or **Off-Payroll Worker**.
This applies to Payroll customers only. **Off-Payroll Worker** applies to anyone with an IR35.
Unless the employee is a genuine IR35 Off Payroll Worker, tick Employee.

New Starter Declaration

Important

Please note that although this section must be completed, the manual New Starter Checklist form or P45 should still be sent to your EPM Payroll Team via our Client Communication Platform.

If you are not a Payroll customer, this section must still be completed. However, if you would prefer not to disclose this information, please select **Unknown**.

1. Select the **New Starter Declaration** that applies.
2. Click **Save** to finish.



The **Edit Employee** page is displayed with the employee's **Personal Information**.

If an Existing, former or archived employee check screen appears double check the details.

If no match is found, click on **Save** to continue. The employee record is created.

If a match is found, click **Cancel** to abandon this task and find the employee by selecting the relevant employee within **All Employees** tab within the Main Navigation Pane. To find the employee within archived or previous employees and see the **Archived and Previous Employees** section within the **Employees Guide**.

Existing, Former or Archived Employee Check

Adam Roberts - 28 May 1988 - NB987867C

The following similar employee exists in the database. The matching values are highlighted.

Please review, and either click 'Save' to go ahead and create the new employee record, or click 'Cancel' to abandon the create.

Forename	Surname	Role	Date of Birth	NI Number
Brett	Roberts		11 Oct 1988	JT 69 51 11 D

Important

If you are unsure, please do not proceed until this has been checked, as this may result in a duplicate being added to the system

HR Admin Customers

Once the employee has been added, a number of tasks will be created for the school and your EPM HR Admin Team. Please view our **Contracts and Letters EPM Connect Guide**.

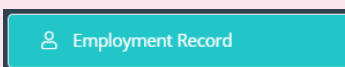
Add Job Role

New job roles can be added to an **Employee Record**. The tabs under **Select Job Role** relate to each individual job role. The tabs above **Select Job Role** relate to the overall employee.

Important

Payroll customers only: When adding a new role it is important to add the Primary Role first. The Bank Details associated with this role will inform the bank account that the employees pay is paid into.

There is therefore no need to complete Bank Details for any role that is not the employee's Primary Role. The Primary Role can be viewed by clicking Employment Record button on the left-hand page navigation pane.



1. In the **Select Job Role** button, click the **+** button. A new window is displayed.



2. From the **Post** drop-down menu, select a post, or leave as **None**.

A number of posts can be set up within the **Posts** section of the **Employees** module. This is not mandatory, however can be used to create a list of filled and unfilled roles and will automatically populate the **Posts Map**, providing a useful organisation chart.

Posts are mainly used for customers using the Recruitment module as they are mandatory for creating vacancies.

3. In the **Job Title** field, enter a job title.
4. In the **Start Date** field, enter a start date.
5. In the **End Date** field, enter an end date, if applicable.

This should only be completed for fixed term or temporary contracts and only if the temporary reason does not relate to cover or a named child.

Important

If an **End Date** is provided, the appointment will end on this date and the appointment will move into **Previous Employment**. However, if the employee is a leaver, you must manually process the employee as a leaver. We therefore recommend setting a task within **Task Management** as a reminder. See the **Resign Employee** section within the **Employees Module Guide** for more information.

6. From the **Reports To** drop-down menu, select the relevant Line Manager's email address.

The **Reports To** field will determine the standard approver for a variety of actions such as **Absence** and **Expenses**.

7. From the **Department** drop-down menu, select a department.

If the department you require is not available, you can raise a request to your EPM Team via our **Client Communication Platform**.

8. From the **Job Category** drop-down menu, select a job category.

9. In the **Starter Tasks** field, select any starter tasks that apply only if relevant.

Starter Tasks are common tasks for starters that have been pre-configured in **Employee Settings**, preventing you from having to create these individually for each employee. Starter Tasks can be set up in **Employee Settings**.

10. Tick the **Casual Member of Staff** box.

Ticking this box will relax mandatory field requirements around job and salary information in the employee record.

11. Tick the **Inside IR35** box, if this applies.

Tick this box if this role is inside IR35. IR35 refers to an off-payroll worker.

Ticking this box will relax mandatory field requirements around job and salary information in the employee record.

12. The **Continuous Service Start Date** field, enter a date.

A suggested date will appear based on the information already entered but can be overridden.

Continuous Service Start date is anything included within the modification order and can include service outside the current organisation (for example roles undertaken within Local Government or the police).

13. In the **Continuous Service Start Date within Organisation** field, enter a date.

A suggested date will appear based on the information already entered within the system but can be overridden.

Continuous Service Start Date within Organisation can be the date that the employee started within your organisation or where applicable with the Local Authority/Trust. The organisation responsible for the employee's payslip.

14. From the **Contract Agreement Type** drop-down menu, select **Casual**.

15. From the **Contract Hour Type** drop-down menu, select **Zero Hours**.

16. Click the **+ Add Job Role** button. The window closes and the employee record is displayed.

 Add Job Role

HR Admin Customers

Once the job has been added, a number of tasks will be created for the school and your EPM HR Admin Team. Please view our [Guide to EPM Connect Employees Module Tasks](#).

Job information

Some fields will have auto-populated from the information provided within the **Add a job** screen.

Effective Date

The **Effective Date** will be pre-set with the employee's start date. If editing the role, the system will prompt you to select an effective date, once **Edit Details** has been selected. However, this can also be manually changed once editing the page.

The chosen **Effective Date** may alter the available options of the drop-down lists, if the settings have been edited between the selected date and today.

Job History

Click the **Job History** button to view all previous and current roles recorded within the system.



Click the **Job History** button to view all previous and current roles recorded within the system.

This will only be relevant for established employees, not when first adding a new role.

This will display salary changes, displayed in order of **Effective Date** order.

Bold text denotes the employee's current role.

Basic Job Details

Some of these fields will already be populated from the information you completed when first adding the employee's details.

The following guide includes the key information required and does not include pre-populated fields or non-mandatory information.

1. From the **Department** drop-down menu, select a department.
2. In the **Property** field, ensure the correct property is selected.
This will default to the property in which you entered the information but should be changed to match the school that the employee is based in.
3. From the **Reports To** drop-down menu, select the person the employee reports to, i.e. their Line Manager.
This will be used in various modules for authorisation purposes where Line Manager has been selected.
4. Leave the **Include In The School Workforce Census** box unticked.
If this is unticked, the role will not be included within the Workforce Census.

Salary Information

Protected Weeks - this will not usually apply. If you think this may apply, please contact your HR Team via the chat.

1. The **Effective Date** will be pre-populated. Do not change.
2. Move the **Enforced Calculation** toggle to **NO**.

Basic Pay

Some of the fields are auto-populated based on the information you enter. Therefore, you should scroll down to **Pay Start Date** and begin to enter the information from there.

1. In the **Pay Start Date** field, select a date.

2. From the **Pay Range** field, select a range.

This is the grade and will define the pay points displayed within the **Pay Scale** field.

3. From the **Pay Scale** field, select a scale.

This is the point. If the pay point you need is not visible you may need to select a different **Pay Range**.

4. In the **FTE Hours** field, enter the FTE hours.

This is the total amount of hours the employee can work in this role.

In the **FTE Weeks** field, enter the FTE hours.

This is the total amount of hours the employee can work in this role.

Bank Details

1. Complete the employee's bank details.

Important

The **Bank Details** should be recorded against the main role held by the employee. This is displayed within the **Primary Job Role** field within the **Employment Record** section of the Employee's Record.

This can also be updated by the employee within the **Salary information** section of **My Profile**, in **My Portal** as part of our self-service feature.

Payroll customers: Please ensure you inform your EPM payroll team should you receive a notification that Bank Details have been changed by an employee after the Payroll Cut Off Date.

Pension

This section is non-editable and will be completed by your Payroll & Pensions Team.