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: 2.2

Date of Last Review: 13th October 2026

Last Reviewed by: Keren Prior, Director of Operational Excellence

Date of Next Review: 13th October 2027

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 13th October 2026 and is issued on a version-controlled basis under her signature.

Document History

Date of Change	13th October 2026
Summary of Change	Changes to Add a Job Role and Salary Information sections.
New Version Number	v2.2
Changes to be notified to	Director of Operational Excellence

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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 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 allow the User access to the EPM Connect System and can also 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 and Managing Users, Permissions and Notifications 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. This is a contractor who provides services to a client through an intermediary, usually their own personal service company (PSC), but who would be classed as an employee if they worked for the client directly.

   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.

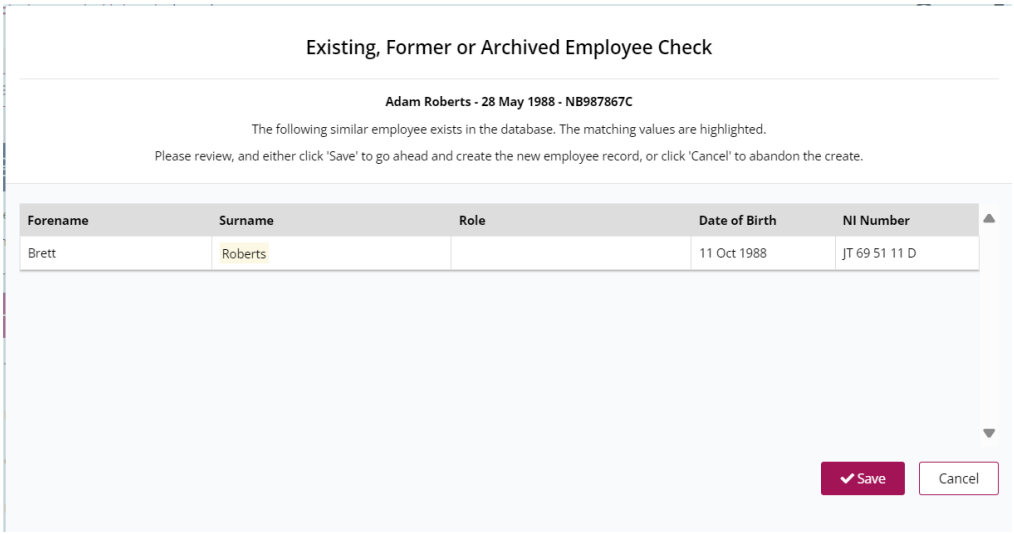


The **Edit Employee** page is displayed with the employee's **Personal Information**.

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.**



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**.

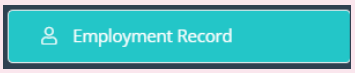
Add Job Role

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 **Process A Leaver 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. From the **Contract Agreement Type** drop-down menu, select **Casual**.
13. From the **Contract Hour Type** drop-down menu, select **Zero Hours**.
14. 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).

15. 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.

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



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.

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.

5. Click **Save**.

Salary Information

1. Enter the **Effective Date**, in this case enter the **Job Role Start Date**.
2. Move the **Enforced Calculation** toggle to **YES**.

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.

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

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

6. From the **Working Pattern Pro Rata Rule** drop-down, select **Calendar Days in Period Rule**.

   Select **365 Rule** for Teaching Staff. Select **Calendar Days in Period** for Non-Teaching Staff.

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.

2. Click **Save**.

Pension

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

HR Admin Customers

Once a new Employee has been added please follow the **Contracts and Letters Guide** to create a new contract and/or letter.

Job Documents

This section allows you to view and upload documents to the employee's record in relation to the **Job Role** selected. You are also able to view and upload signable documents.

You can view and upload documents related to a specific role within the **Job Documents** tab within the general **Job Record**.

This section allows you to upload documents and signable documents, which can be shared with the employee and saved within the employee record.

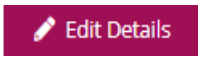
 Click this icon to make the document signable.

 Click the pencil icon to edit the document.

 Click the cross icon to delete the document.

 Click this icon to download the document.

1. If you are not already in edit mode, select the **Personal Information** tab on the left-hand side of the page.
2. Click the **Edit Details** button. The page will refresh and the fields will become editable.

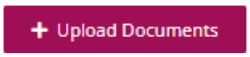
   

3. Select the **Job Documents** tab. You will now be in Edit mode.

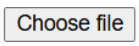
   This area allows you to store documents related to the specific role selected. Documents that relate to the overall employee should be saved within **Employee Documents** tab further up the page.

Add Document

1. Scroll down to **Documents** and click the **+ Upload Documents** button.

2. In the **Title** field, enter the title.
3. Click **Choose file**

4. In the **Expiry Date** field, select a date.
5. For non-signable documents tick the **Visible to Employee in My Portal** box to make the document visible to the employee. If the document will be signable, leave this blank.
6. Tick the **Create a signable document from this file after upload** if you wish to make the document signable.
7. Click the **Save** button.

8. The item will appear within the **Documents** section and if the **Visible to Employee in My Portal** box has been ticked, within the employee's **My Documents** section.

Add Signable Document

1. Under the heading **Signable Documents** and click the **+ Add Signable Documents** button.

2. In the **Name** field, enter a name.
3. In the **Message** field, enter a message.

   This can be over-written with a bespoke message.

4. In the **Signature Deadline** field, select a date.

   This must be a future date, not today's date.

5. From the **Document** drop-down menu, select a document.
6. From the **HR User Notification** drop-down menu, enter the email address of the employee the document relates to.

   Selected users will receive an email notification whenever any action has been taken, for example the document has been signed or read.

7. From the **Choose HR Recipients** drop-down menu, select the users that apply.

   This should include the employee that the document relates to and if desired, the other signatories. Selected school signatories will be able to view this document within **My Documents** in **My Portal**.

   The recipient is the owner of this document, this means that after users have signed this document, the document will stay attached to the employee profile. If there are multiple recipients, this means that there will be multiple signable instances of this document that will belong to each individual recipient

8. Leave the **Choose Bureau Recipients** field blank.

Add Signatory

Important

The Employer should be added as the first signature. If multiple employers need to sign the document, on behalf of the school or trust, these should be added as subsequent signatories. The Employee should always be the final signatory.

Add Employer Signatories

1. Click the **+ Add Signatory** button. A new window is displayed.

2. From the **HR or Bureau User** drop-down menu, select **HR User**.
3. From the **Users** drop-down menu, select the user that apply.

   Select the email address of the user who will be signing on behalf of the school. Alternatively select **Signer Tags**.

4. From the **Signer Tags** drop-down menu, select the signer tags that apply.

Signer Tags allow you to set up groups of signatories, for example the Line Manager related to the account or the HR Team.

Signer Tags are set up in **Employee Settings**.

5. From the **Approval Condition** drop-down menu, select the approach that applies for document to be classed as approved.

   Requires signing by All: Requires each user or signer tag to sign the document.

   Requires signing by Any: Requires just one user or signer tag to sign the document.

6. From the **Approval Order** drop-down menu, select first.

   This will allow the employer to sign first on behalf of the school or Trust. The employee will not be able to view or sign the document until all other signatories have signed the document.

7. Click the **Save** button. The window closes.

8. Repeat the process for all additional employee signatories.

Employee Signature

You should now repeat the process for the Employee.

1. Click the **+ Add Signatory** button. A new window is displayed.

2. From the **HR or Bureau User** drop-down menu, select an **HR User**.
3. From the **Users** drop-down menu, select the employee.
4. Leave the **Signer Tags** field blank.
5. From the **Approval Condition** drop-down menu, select either option.

   Either option can be used for employees.

6. From the **Approval Order** drop-down menu, select and option.

   Select the next available order, for example if you have already selected First and Second for employers signing on behalf of the trust, select **Third**.

7. Click the **Save** button. The window closes.

8. Click the **Save** button within the main page.

Send email

1. Click the email icon on the far right-hand side of the document listed. A preview of the email is displayed.

   This is the email that will be sent to the employee. The email content cannot be changed.

2. Click **Send**.



The document will now be sent to the school signatory to sign. This will appear as a **Task** within the **Task Management Module** and within **My Tasks** within **My Portal**.

Once this has been completed, it will be sent to the employee to sign.

Once signed by both parties, the document will be visible to the employee within **My Documents** in **My Portal**, unless the **Visible to Employee** box has not been ticked.

If the employee rejects the document, the user who has sent the document to be signed will not be notified. Therefore, ensure you have processes in place to receive feedback and for staff to notify you if they have rejected a document. It may be useful to create a task for yourself as a reminder.

View Signable Documents

These can be viewed by your **HR** and **Admin Teams** within the **Employee Documents** section of the **Employees** module, not within the **Signable Documents** section. The **Signable Documents** section is used only to manage signable documents, not to view them.

Within the **Documents** section of **Employee Documents**, click the download icon on the far right-hand side of the document to view the document.

Once a document has been uploaded, either as a standard document or signable document, you will be able to view the details of the document, including whether it is signable and visible to employees. For signable documents you can also view whether the document has been signed and sent for signing.

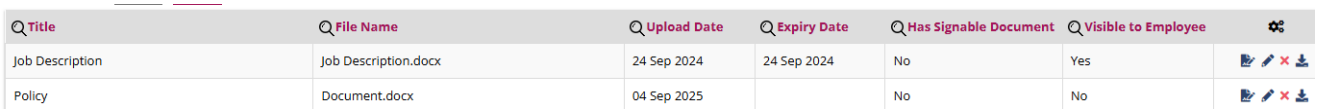
Other actions within Documents

Click this icon to make the document signable. If you have followed the steps above, this is unnecessary, as the document has already been made signable.

Click the pencil icon to edit the document.

Click the cross icon to delete the document.

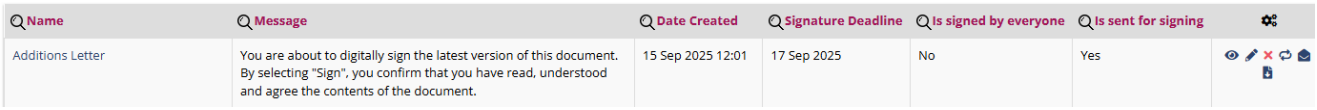
Click this icon to download the document.



Title	File Name	Upload Date	Expiry Date	Has Signable Document	Visible to Employee	
Job Description	Job Description.docx	24 Sep 2024	24 Sep 2024	No	Yes	
Policy	Document.docx	04 Sep 2025		No	No	

Other actions within Signable Documents

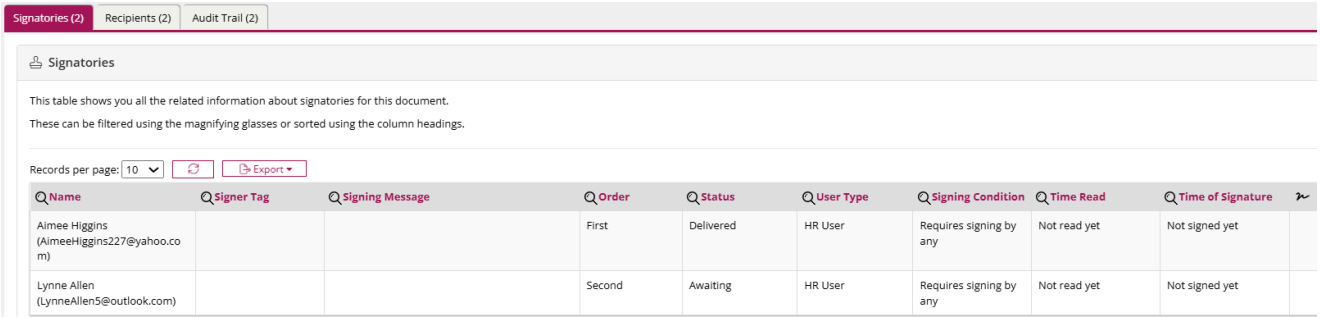
- Click the eye icon to view the document, in addition to an **Audit Trail** for this specific document and the **Recipients** and **Signatories**.
- Click the pencil icon to edit the document. Editing the document will remove the signatures.
- Click the cross icon to delete the document.
- Click this icon to reset the document. This will reset (remove) the signing process and all existing signing data. This is useful if a document has been sent to an incorrect signatory or the wrong document has been sent.
- Click this icon to send the document to be signed.



Name	Message	Date Created	Signature Deadline	Is signed by everyone	Is sent for signing	
Additions Letter	You are about to digitally sign the latest version of this document. By selecting "Sign", you confirm that you have read, understood and agree the contents of the document.	15 Sep 2025 12:01	17 Sep 2025	No	Yes	

View Signable Document, signatories, recipients and progress

The progress of a signable document can be seen by clicking on the title of a signable document. This will display the **Name**, **Signer Tags**, **Signing Message**, **Order**, **Status**, **User Type**, **Signing Condition**, **Time Read** and **Time of Signature**. Progress is also recorded within the **Audit Trail** tab.



Signatories (2) | Recipients (2) | Audit Trail (2)

Signatories

This table shows you all the related information about signatories for this document.

These can be filtered using the magnifying glasses or sorted using the column headings.

Records per page: 10 | Export

Name	Signer Tag	Signing Message	Order	Status	User Type	Signing Condition	Time Read	Time of Signature
Aimee Higgins (AimeeHiggins227@yahoo.com)			First	Delivered	HR User	Requires signing by any	Not read yet	Not signed yet
Lynne Allen (LynneAllen5@outlook.com)			Second	Awaiting	HR User	Requires signing by any	Not read yet	Not signed yet

Check the progress of the contract or letter

Once the document has been sent for signing, we recommend checking the progress of the document to ensure that all parties have signed the document, in order to ensure compliance.

1. From the left-hand side of the system, select **Employees**. A list of further options is displayed.
2. Select **Details**. A list of further options is displayed
3. Select **All Employees**.

   In the **Employee Search**, enter the name of the employee you wish to view.



4. Click the eye icon next to the employee you wish to view. The employee record is displayed.
5. On the left-hand side of the **Employee Details** page, from the **Select Job Role** drop-down menu, select the relevant job role.
6. Select the **Job Documents** tab.
7. Click the **Edit Details** button.



8. Check the **Is sent for signing** column within the data table to ensure the document has been sent.

   Yes indicates the document has been sent.

   No indicates the document has not been sent.

   To send the document, click the email icon next to the relevant document and click **Send**.

9. Check the **is signed by everyone** column.

   Yes indicates the document has been signed by everyone. **No** indicates the document has not been signed by all parties.

- Click the eye icon and select the **Signatories** tab to view the progress of the document.
- Click the pencil icon to edit. Editing will remove all signatures from the document.
- Click the cross icon to delete the document.
- Click the double arrow icon to reset the document. This will remove all signatures.
- Click the envelope icon to send the document for signing.
- Click this icon to preview the document. The document will appear within your download files.
- Click this icon to make the document signable
- Click this icon to download the document.

Please note that EPM and EPM Connect will not send out any correspondence to employees once live. This allows you to tailor the timing and content of the email, however a useful template can be found below.

Example email

Dear XXX,

Welcome to EPM Connect.

My Portal
*A key benefit of our HR platform, EPM Connect is employee self-service. **My Portal** provides employees with access to their payslips, profile and depending on the modules chosen by the school, access to self-service functionality across a number of areas.*

*All new payslips following migration to the new system can be viewed within **My Payslips and Statements** within **My Portal**, in **EPM Connect**.*

*This includes the ability to update **Contact Details**, **Next of Kin** and **Bank Details**. Please see the attached My Portal Guides for more information.*

The first time you access the platform, you will need to create a new password.

1. *Enter https://www.epmportal.uk/ into the search bar of your preferred browser.*
2. *In the **Login** field, enter your work email address and click **Forgotten password**. An email will be sent to your inbox.*
3. *Open the email and click **Please click on this link to reset your password**. A webpage will open.*
4. *Enter your email address, followed by a password.*

   Your new password should be:
   - *10 characters long*
   - *include a combination of upper and lower case letters*
   - *include at least one special character*
   - *include one number.*
5. *Re-enter your password and click **Reset**.*

*Your password has been reset. Please return to the website and enter your **Login** and **Password**.*