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.

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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	23rd 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

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**.

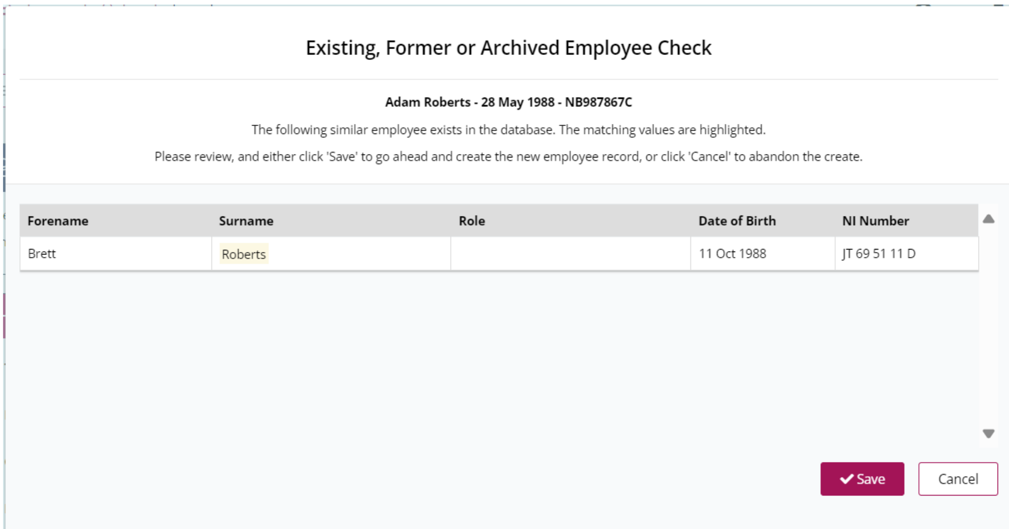
1. Select the **New Starter Declaration** that applies.
2. Click **Save** to finish.

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.**



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**.

Personal Information

Only those fields denoted by an asterisk or specified within this guide or the **Show Me How To** guides are mandatory.

Important

Do not enter **-** or **N/A** against any fields which are not relevant as this will be shown within any letters or contracts.

1. If you are not already in **Edit** mode, click the **Edit Details** button. The page is re-displayed with editable fields.

   If adding details for the first time the page will automatically be editable.

2. In the **Preferred Name** field, enter a preferred name if relevant.
3. In the **Former Name** field, enter a former name if relevant.

   Important

   For HR Admin customers, please ensure that you complete the **Former Name** field in order for your EPM Team to carry out any pre-employment checks.

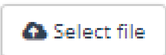
4. In the **Teacher Number field**, enter a teacher number.

   This field is only relevant to teachers.

5. From the **Legal Gender for HMRC** drop-down menu, select a gender.

   Legal Gender for HMRC is a mandatory field for EPM Payroll customers.

6. Tick the **Key Holder** box, if relevant.
7. The **Generated Employee Payroll No.** is automatically generated
8. In the **Car Registration** field, enter a registration number.
9. Within the **Employee Pictur**e section, click the **Select file** button.

10. Within the **Sensitive Information** section, click the **Show Sensitive Information** on the left-hand side.

11. Complete the **Sensitive Information** fields.

    Sensitive Information (ED&I data)

    Sensitive information includes **Ethnicity**, **Marital Status**, **Religion**, **Reasonable Adjustments**, **Medical Conditions** and **Allergies**.

    This information will be hidden from users. To view the information, click the **Show Sensitive Information** button. The **Audit Trail** will record every instance that this information is viewed, including who and when it was viewed.

    Each time the **Show Sensitive Information** button is clicked, this will appear within the **Audit Trail**.

12. Within the **Contact Details** section, complete the fields.

> **Important**
>
> If a line of the address is not relevant leave this blank. DO NOT include - or N/A as these will appear in relevant letters and contracts for HR Essentials customers.
>
> **Work Email** should not be overwritten.

13. Within the **Next of Kin** section, complete the fields.

    Both **Contact Details** and **Next of Kin** can be completed by employees within **My Portal**.

14. Click **Save** to finish.

> **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 Contracts and Letters EPM Connect Guide.

ID & Other Checks

Select the **ID & Other Checks** tab on the left-hand side of the page. Complete the fields you wish to complete and click **Save** to finish.

This section will also display any **Other Checks** that have been added within **Employee Settings**.

> **MODULE TIP**
>
> Should a current Driving Licence be necessary for an employee, for example for minibus drivers, you may wish to add a task in Task Management to re-check this ahead of the expiry date.

Pre-employment Checks

Select the **Pre-employment Checks** tab on the left-hand side of the page. Complete the fields you wish to complete and click **Save** to finish.

The checks displayed relate to the checks chosen when completing the initial details for **Add an employee**. However, to add additional checks, tick the box on the far right-hand side of the check. The details for completion are displayed.

You can also add new checks within the **Other Checks** tab of **Employee Settings** page. These will appear within **ID and Other Checks**.

ID, **DBS** and **Right to Work** checks are mandatory for employees and will automatically appear as checks to be completed.

Payslips & Statements

Payroll Customers: All payslips, P45s and P60s will automatically appear within this section following each month's payroll. Employees can view payslips within **My Payslips and Statement**, in **My Portal**.

Employee Documents

You can view and upload documents to the overall **Employee Record** within the **Employee Documents** tab within the general **Employee Record**.

Please see the add a new **Employee – Teaching or Non Teaching Guides** for more information.

Audit Trail

The **Audit Trail** tab provides a full audit trail of every action completed against the employee's file. Click the **Audit Trail** tab within the tabs displayed on the left-hand side to view a full audit trail.

Every change made to employee records is displayed, with a date and the name of the person who has updated the record. The audit trail relating to signable documents is displayed separately and is not included within the main **Audit Trail** tab. This audit trail can be viewed within **Employee Documents** or **Job Documents**, by clicking on the document title.

Employment Record

Employment Record is pre-configured and should not be edited unless the employee has resigned.

The **Generated Employee Payroll No.** can be viewed within this section.

The **Primary Job Role** is the main role held by the employee and the role in which the **Bank Details** provided against this role will be applied.

Select Employment

The employment record will display the start date of the employee's employment and if the employee has previously worked at the organisation, will include the option to view their previous employment.

Benefits

Benefits is pre-configured and non-editable.

Please note this will not be visible until the first pay run has been completed for this employee.

Loans

Loans is pre-configured and non-editable.

Attachment Orders

Attachment Orders is pre-configured and non-editable.

Attachment orders include court orders that allow a creditor to take money from a debtor's salary.

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. From the **Contract Agreement Type** drop-down menu, select **Casual**.
13. From the **Contract Hour Type** drop-down menu, select **Zero Hours**.
14. Click the **+ Add Job Role** button. The window closes and the employee record is displayed.

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.

   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.

   Important

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

Pension

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