Adding a New Employee (Teaching Staff)

EPM Connect Guide



Document Control

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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 9th November 2026 and is issued on a version-controlled basis under her signature.

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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. The guide therefore covers **Add new employee**, **Personal Information**, **Add a job**, **Job Information** and **Salary Information** first, allowing you to complete any additional sections once the key information has been added.

Fields denoted in this guide by this symbol are mandatory. Not completing these fields may cause errors or non-payments.

Fields denoted in this guide by this symbol are only mandatory for certain customers, for example HR Admin, HR Essentials or HR Partner customers, or those who have purchased the SWFC, or Enhanced Absence or Time & Expenses modules.

Add new employee

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 template can be found at the end of this guide.

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 or already a User, for example a volunteer, select a user from the **Link to Existing User** drop-down menu. View the **Inter-MAT Transfer** guide for more information.
2. 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.

3. 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.

4. 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, and their related permissions can be viewed within the **General Guides** page and clicking on the **Adding and Managing Users, Permissions and Notifications in EPM Connect Guide.**

Pre-Employment Checks

1. Select from any of the additional checks listed.

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

   Speak to your Implementation Team should you need any additional checks to be added.

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

   Only checks selected will appear within the **Pre-Employment Checks** area of the **Employee Record**.

Should you need any additional checks not listed, please speak to your Implementation Team.

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.

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.

Payroll link options will display all payrolls available within this property/school, for example ABC Academy Support or ABC Academy Teaching if payroll is split. If no split payroll, only one option may appear.

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**.

   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.

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**.

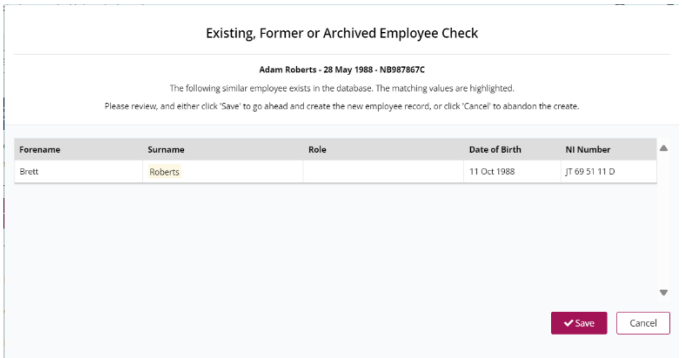
If an existing, former or archived employee check screen appears double check the details.

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 in the **Left Navigation Pane**. To find the employee within archived or previous employees, see the **Archived and Previous Employees** section within the **Employees Guide.**

Important

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



Personal Information

The Personal Information section provide information relating to the employee, rather than any specific job role.

Important

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

Much of this information will already have been completed on the previous page. Additional mandatory fields that will already have been completed on the previous page include:

- User Email
- Title
- Forename
- Surname
- Gender
- Legal Gender for HMRC
- NI Number

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. An **Employee ID** can be added if you choose to assign one, however, this is not mandatory.
3. In the **Preferred Name** field, enter a preferred name if relevant.
4. 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.

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

   This field is only relevant to teachers.

6. From the **Gender** drop-down menu, select a gender.

   This field is mandatory due to reporting requirements.

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

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

8. Tick the **Key Holder** box, if relevant.
9. The **Generated Employee Payroll No.** is automatically generated

10. In the **Car Registration** field, enter a registration number.
11. Within the **Employee Picture** section, click the **Choose file** button to add an employee photo.



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



13. Complete the **Sensitive Information** fields.

    Sensitive information includes **Ethnicity**, **Marital Status**, **Religion, Disability, Sexual Orientation**, **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**.

    Customers who have purchased the SWFC module will need to include Ethnicity and Disability.

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

    Address 1, **Address 2** and **Postcode** are mandatory 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.

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

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

16. Click **Save** to finish.



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.

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.

3. In the **Job Title** field, enter a job title.
4. In the **Start Date** field, enter the date the employee starts in this role.

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 Line Manager.

   The **Reports To** field is not mandatory but will determine the standard approver for a variety of actions within the **Enhanced Absence**, **Enhanced Time & Expenses**, **Training and CPD** and **Performance** modules.

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

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

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

   The **Job Category** will define the options available when setting up the appointment – i.e. the **Pay Range** within **Salary Information**. in addition to the holiday entitlement.

9. From the **Role Identifier** drop-down menu, select a role.

   This field is only mandatory for customers using the **School Workforce Census** module or who may wish to purchase this in the future.

10. From the **Type of Post** drop-down menu, select a post.

    This field is only mandatory for customers using the **School Workforce Census** module.

11. In the **Starter Tasks** field, select any starter tasks that apply.

    Starter Tasks are common tasks related to starters that have been pre-configured in **Employee Settings**, preventing you from having to create these individually for each employee. Please view the **Employee Module Settings** guide for more information.

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

    Tick this box if this role is inside IR35. This refers to an off-payroll worker. Ticking this box will relax mandatory field requirements around job and salary information in the employee record.

13. Tick the **Casual Member of Staff** box, if this applies.

    Tick this box if the role relates to a casual or zero hours staff. Ticking this box will relax mandatory field requirements around job and salary information in the employee record.

    The **Add a new Employee – Casual Staff** guide within the Connect guides provides a separate, simplified guide for adding Casual employees.

14. Tick the **Senior Leadership Team** box, if the member of staff is a member of the SLT.

This feeds into SWFC and other reports.

15. From the **Contract Agreement Type** drop-down menu, select a contract agreement type.

    If the role is **Temporary** or **Fixed Term**, an additional field will appear. In the **Temporary Contract Reason Type** field, select the reason for the role's temporary status. For example, *Named Child*.

    The reason provided will be included within letters and contracts.

16. From the **Contract Hour Type** drop-down menu, select a contract hour type.

Important

Carefully consider the options. Selecting the wrong option can result in incorrect calculations.

Part Time: 52 week staff working part time hours within this role.

Full Time: 52 week staff working full Time hours within this role.

Part Time Term Time Only: Term Time only staff working part time hours within this role.

Full Time Term Time Only: Term Time only staff working full time hours within this role.

Zero Hours: Casual staff working without set contracted hours within this role.

17. In the **Continuous Service Start Date** 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 is anything included within the modification order and can include service outside the current organisation (Example: roles within Local Government or the police).

18. 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 is 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.

19. In the **Aggregated Service Date** field, enter a date.

    The **Aggregated Service Date** is the date from which you start counting a teacher's total service. Adjust the date to discount any breaks in teaching service. This is not always the date they started their first teaching job.

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



HR Admin, HR Essentials and HR Partner Customers

Once the job has been added, you must click the **Return to Viewing only** button at the bottom of the page, followed by the **Workflows** button at the top of the screen. This will send a task to the EPM HR Team to create any relevant documentation in relation to the starter. Please view our **Contracts and Letters EPM Connect Guide** for more information.

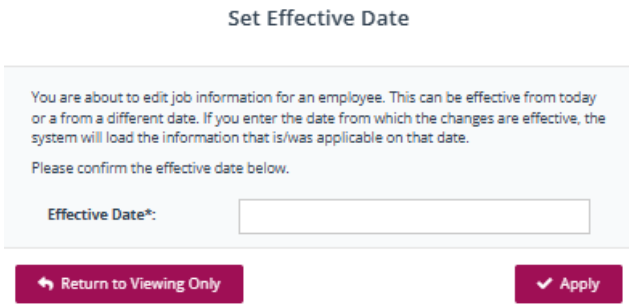
Job Information

Some details will auto-populate 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 within 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.



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 Mandatory fields are shown first in the steps below, allowing you to add any non-mandatory fields afterwards, only if beneficial to your school or trust.

Important

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

1. From the **Type of Post** drop-down menu, select a type of post.

   This is required as part of the Workforce Census.

2. The **Entitlement Group** field will be populated once the job category is populated. This is a non-editable field.

   This will determine holiday entitlement calculations.

3. From the **Account Code** drop-down menu, select an account code.

   This will be set up by EPM. If the option you need is not displayed, please speak to your EPM Team.

4. From the **Role Identifier** drop-down menu, select a role identifier.

   This is required as part of the Workforce Census.

5. From the **Cost Centre** drop-down menu, select a cost centre.

   This relates to budget codes and will be set up by the EPM Team within **Admin**, within **Main Settings**. This can be used to link to nominal codes within optional journal reports. If the option you require is not displayed, please speak to your EPM Team.

6. Tick the **Senior Leadership** box only if the employee is a member of the Senior Leadership Team or a Business Manager/Bursar.

   This is for reporting purposes.

7. In the **Job Description** field, enter any relevant information relating to the role.

   This is a free text field and can be used to include additional information regarding the role or changes to the role. For example, the reason for a point increase, a reduction in hours or any other information that you would like to view within the **Audit Trail**.

8. From the **Origin** drop-down menu, select an origin.

   This is required as part of the Workforce Census and describes the employee's employment or situation prior to this employment.

9. In the **End Date** field, enter an end date if relevant and known.

   Important

   This is only relevant to fixed term roles or roles that have ended. Clicking within the **End Date** field will automatically populate today's date. Do not click in the field unless the role has ended.

10. From the **Destination** drop-down menu, select a destination.

    This is only relevant if an **End Date** has been entered. This is required as part of the Workforce Census and describes the employee's plan should they have given notice.

11. **Reason for Leaving** should only be completed when an employee leaves this role.

    This is required as part of the Workforce Census.

12. If the role has ended, enter the **Final Holiday Balance**.

    This figure is not required by Payroll so if unsure, enter 0.

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

    If the option you require is not displayed, please speak to your EPM Team.

14. In the **Property** field, ensure the correct property is selected.

    This will default to the property in which you entered the information but can be changed to match the school that the employee is based in.

15. From the **Reports To** drop-down menu, select the relevant email address.

    This is 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, such as Enhanced Absence Management, Enhanced Time & Expenses, Training & CPD and Performance.

16. In the **Property Arrival Date** field, enter the date

    This is the date the employee starts/started at the school, not within this role. For example, the employee may have recently worked within/ currently works within the organisation in another role. This is required as part of the Workforce Census.

17. Tick the **Include In The School Workforce Census** box, if you wish the employee to be included in the Workforce Census.

    This box is ticked as default. If unticked, the role will not be included within the Workforce Census.

Contract Information

1. In the **Contract Number** field, enter a contract number if required.

   This refers to the organisation's internal contract number and will not be automatically populated. This is not a mandatory field.

2. In the **Required Notice Period** field, enter a number and select from **Days**, **Weeks**, **Months** or **Term**.

   This is not mandatory but recommended in line with the Good Work Practice legislation.

3. Tick the **Use Pro-Rata Paid Leave** if this applies.

   If **Pro-Rata Paid Leave** is ticked the holiday entitlement will be calculated based on service within the academic year. If this is not ticked, holiday entitlement will not be calculated pro-rata.

   Pro-Rata Paid Leave will be configured during implementation and cannot be changed per employee. Should you wish to change this, please speak to your HR Team.

4. From the **Bank Holiday** drop-down menu, select the option that applies.

   If **Included in Allowance**, adjustments will be made automatically with regards to Annual Leave in the Absence Module.

   For example, if you enter 33 days in the **Paid Leave** field, only 25 days Annual Leave will be available for employees to book.

5. From the **Override Sick Leave Policy** drop-down menu, select the option that applies.

   This allows you to select an alternative appropriate sickness policy for paid absence from the drop-down list. These policies are set up within **Employees Settings**. If using your standard policy, select **Not overridden**.

6. In the **Training Requirements** field, enter any training requirements or planned training.

   This information will appear within contracts created by your EPM Team.

Work Pattern

Important

Work Pattern is used to calculate accurate Working Time Lost in relation to any absence for this employee. If you have not already imported these in bulk following migration, please speak to your Migration Team. If you have already imported these, this should be added for all new employees.

1. From the **Working time Lost Measured In** drop-down menu, select **Days**.

   This information will be used to measure time lost for absences.

2. Click the **+ Add Shift** button. A new window is displayed.
3. Shifts specify the hours worked each day. If the role has different hours for different days, each set of hours and days they apply to, should be created as a separate shift.

4. From the **Use a Template** drop-down menu, select the option that applies.

   Templates can be created within **Shift Templates** in **Employee Settings**. This will allow you to create set shift patterns to reduce time taken to set up new employees and job roles.

5. From the **Week** drop-down menu, select the option that applies.

   This allows you to create alternating shift patterns where applicable – selecting **Week 1** or **Week 2**. If the shift does not alternate, select **No Alternating**.

6. In the **Start Time** field, enter a start time.
7. In the **End Time** field, enter an end time.
8. In the **Hours** field, enter the total hours or click the arrow to auto-calculate, based on the **Start** and **End Time** provided.

   To calculate the number of hours automatically (without any breaks), click the **Calculate** button.

   To specify the number of hours with break times removed, enter the hours in the text box

9. From the **Type** drop-down menu, select **All**, **Term Time** or **Holiday**.

   Important

   If the employee works less than 52 weeks, this MUST be completed to view the entitlement weeks.

10. In the **Days** field, select the days the employee will work.

    Days default to Monday to Friday and are highlighted in pink. Click the days to remove them. When removed these will be greyed out.

11. In the **Active from** field, select the date the shift pattern will begin.
12. In the **Active to** field, select the date the shift pattern will end.
13. Click the **+ Add Shift** button to save the shift.

Absence Approver Tags

This area is only relevant to customers with **Enhanced Absence** set up. Here you will select the users who will approve various absence types, including holiday related to this employee within this particular role. **Absence Approver Tags** are set up within **Absence Settings**.

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



2. Tick the approver tag that applies

   For example e.g. *SLT,* to enable them to approve specified absence reasons (if applicable).

3. Click the **+ Add Absence Approver Tag** button. You will return to the main screen.



4. Click the **Save** button to finish.



HR Admin, HR Essentials and HR Partner Customers

Once the job has been added, you must click the **Return to Viewing** only button at the bottom of the page, followed by the **Workflows** button at the top of the screen. This will send a task to the EPM HR Team to create any relevant documentation in relation to the starter. Please view our **Contracts and Letters EPM Connect Guide** for more information.

Salary Information

Basic Pay

1. The **Effective Date** will be pre-populated. Do not change.
2. The **Temporary Change** toggle will default to **NO** for new roles. This can be moved to **YES** in the future when adding temporary contract changes.
3. Move the **Enforced Calculation** toggle to **YES**.

Important

This is necessary to auto-calculate fields based on the data you have entered.

The following fields are auto populated based on the information you enter.

- **FTE Salary:** Populated by Pay Range and Pay Scale.
- **Daily Rate: FTE Salary** divided by local divisors used by your school/Trust.
- Base Hourly Rate: FTE Salary divided by local divisors provided by your school/Trust.
- **FTE Value:** Calculated in line with the salary calculations provided by the school/Trust.
- **Paid for Weeks:** Calculated by **Working Weeks** and **Holiday Entitlement**.

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

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

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

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

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

7. Tick the **Safeguarded Salary** box if relevant.

   Please speak to your EPM Team about any Safeguarded Salaries before a Pay Award is applied.

   Reasons for Safeguarded Salary may include an employee that has rescinded a TLR or due to a restructure has moved down in points and is receiving their previous salary for an agreed period.

8. In the **Contract Hours** field, enter the contract hours.

   This is the number of hours detailed within the employee's contract.

9. From the **FTE Hours** drop-down menu, select the FTE hours.

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

10. In the **Contractual Overtime Hours** field, enter the hours worked over the FTE hours.

11. In the **Contractual Overtime Rate %** field, enter the percentage rate to be applied to hours over the FTE hours.

12. The **Contractual Overtime Amount** field will auto-populate upon saving and does not need to be entered.

    This is calculated based in line with the salary calculations provided by your school/Trust.

13. **Paid for Weeks** will auto-populate upon saving.

    Based on entitlement groups once **Working Weeks** has been entered (see below). This field will not populate until the changes on the page have been saved. This field should not be changed.

    Paid for Weeks is the total number of weeks a term-time school or support staff member is paid for over the year, which includes both actual working weeks and an accrued holiday entitlement

14. From the **FTE Weeks** drop-down menu, select the number of weeks the FTE would work in a year.

    This is number of weeks a Full-Time Employee would work in a year, including paid leave.

    This is only applicable for non-teaching staff.

15. In the **Protected Weeks** field, enter the number of protected weeks, only if applicable.

    This is the number of additional weeks to be added to working weeks to give a guaranteed number per year, for example after TUPE.

    This will not apply to most employees. This will only apply if the annual leave that is calculated by the system needs adjusting to match a previous post. This is generally due to errors with previous providers or workarounds required by the school. Speak to your HR Admin Team or Payroll for further advice.

16. In the **Protected Reason** field, enter the reason.

    This is a description of the reason for the **Protected Weeks** (Example to match a TUPE agreement).

17. From the **Working Weeks** drop-down menu, enter the weeks.

    This is the number of weeks the employee works in a year.

18. In the **Paid Over Weeks** fields, enter the weeks.

    This is the number of weeks the employee is paid over the year and generally reflects FTE weeks.

19. In the **Contract Days** field, enter the contract days.

    This is the average number of days worked per week. This could be a decimal, for example if working alternative shifts, or some half days per week.

20. In the **Working Pattern** field, please enter the contract hours relating to each day.

    This field is vital to ensure employees are paid. Please enter the average hours worked on each day. For example, if an employee works alternating shifts on a Monday - Week 1: 6 hours, Week 2: 4 hours, you will enter 5 hours as the average hours on a Monday.

21. The **Payroll Number** is auto populated and does not need to be completed.

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

    Select **365 Rule** for Teaching Staff.

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

    - **Working Days In Period** = Salary for period x days worked in period.
    - **Calendar Days In Period** = Salary for period / (period days - days worked in period).
    - **260 Rule** = Annual salary / 260 x days worked in period.
    - **365 Rule** = Annual salary / 365 x days worked in period.

23. The **Tax Code** field does not need to be completed and is not used by our Payroll Team.

Leadership Pay

These fields are relevant to HR Reporting.

1. Tick the **Leadership Pay** box if relevant.

   This is for reporting purposes.

2. From the **Pay Framework** drop-down menu, select the pay framework.

   This relates to the agreed pay scales and is for reporting purposes.

3. In the **Pay Range Minimum** field, enter a minimum.

   Enter the minimum possible salary for this grade.

4. In the **Pay Range Maximum** field, enter a minimum.

   Enter the minimum possible salary for this grade.

Agency Staff

This section does not need to be completed and will not affect payroll; however, it may be useful to tick the **Agency Staff** box for reporting purposes so that you can choose to exclude agency staff.

Additions and Deductions

Additions and Deductions relating to the employee are displayed within this section but managed within the **Additions and Deductions** tab. See section below.

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.

View Salary History

To view the salary history of the employee related to this job role, click the **View Salary History** button.



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.

Red text denotes a **Temporary Change**.

Blue text denotes a **Temporary Change Reversed**.

Additions and Deductions

Additions and Deductions relating to the employee are displayed and managed within this section.

Important

Deductions cannot be added within this section. These are managed by your EPM team. If you wish to add/amend/delete a deduction, please send a request via the EPM Client Communication Platform.

Current additions should not be deleted as this may result in previous payments made in relation to this addition being reclaimed via payroll. Amendments to additions should be made via an amendment to the current addition or a by adding a new line.

Once added start dates should not be changed. Instead, if a date needs adjusting, that allowance should be ended and a new allowance added.

Add a new addition

1. Click the **+ Add Addition** button.

2. From the **Addition Settings Title** drop down, select the relevant option.

   If the title you require is not available, speak to your EPM Team.

3. From the **Full Time Amount/Amount/Percentage** drop-down menu, enter an amount or click the **Use Default** button to auto-calculate the amount.

   This will vary dependent on the type of addition and setup. It may also provide a fixed amount that cannot be over-written.

4. In the **Payment Start Date** field, select a start date.
5. In the **Payment End Date** field, select a start date.
6. In the **Reason** field, enter a reason.

   HR Admin, HR Essentials and HR Partner Customers

   Although not mandatory, the Reason field is used to populate content in letters and contracts. If not populated, the document will prompt the user to manually add a reason.

7. Tick the **Is this payment a bonus** box if relevant.
8. Click **Save**.

Amend a current addition

Current additions should not be deleted as this may result in previous payments made in relation to this addition being reclaimed via payroll.

To correct a current addition (where previous payments relating to this addition have already been made), follow the **Correct a current addition** guide below.

To amend information to a current addition (where previous payments relating to this addition have already been made), follow the **Create a new line** guide below.

Correct a current addition

Correcting the current addition if previous payments have been made may result in previous payment made in relation to this addition being reclaimed via payroll. If you do not wish for this to happen, do not edit the current addition but instead add a new line.

1. Click pencil icon next to the addition you wish to amend.
2. Click the pencil icon to amend the relevant line.
3. Amend the details as appropriate.
4. Click **Save**.



Create a new line

The new line will supersede the previous line based on the start date and will automatically create an end date for the current line based on this date.

1. Click pencil icon next to the addition you wish to amend.
2. Click the **+ Add Line** button.



3. From the **Full Time Amount** drop-down menu, enter an amount or click the **Use Default** button to auto-calculate the amount.



4. In the **Payment Start Date** field, select a start date.
5. In the **Payment End Date** field, select a start date.
6. In the **Reason** field, enter a reason.

   Although not mandatory, the Reason field is used to populate content in letters and contracts. If not populated, the document will prompt the user to manually add a reason.

7. Tick the **Is this payment a bonus** box if relevant.
8. Click **Save**. 

The new line will replace the previous addition after the start date.

Pension

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

Qualifications

Select the **Qualifications** tab on the left-hand side of the page. Complete the fields and click **Save** to finish.

Qualifications are not mandatory, however, HR Partner, HR Essentials and HR Admin customers should complete the following:

If the employee is a teacher, complete the all the relevant **Qualified Teacher Status** Fields.

If the employee is an HLTA, tick the **HLTA** box.

1. To add qualifications, click the **+ Add Qualification** button and complete the relevant fields.



2. Click **Save** to finish.



ID & Other Checks

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

Click the eye icon to display the information. Re-click to hide the information.

Select the **ID & Other Checks** tab on the left-hand side of the page. Complete all relevant fields and click **Save**.

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

Pre-employment checks allow you to view the checks assigned and completed for this employee. This also links directly to the Single Central Record, for customers who have purchased this module.

Select the **Pre-employment Checks** tab on the left-hand side of the page, complete the fields and click **Save** to finish. You can also add new checks within the **Other Checks** tab of **Employee Settings** page.

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 checks displayed in green. The details relating to the relevant check are displayed.

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

Fields denoted by **~** are required for the check to be considered complete.

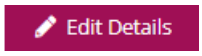
Payslips & Statements

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

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

1. 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 **Employee Documents** tab. You will now be in **Edit** mode.

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

   This area allows you to store documents related to the Employee. Documents that relate to specific job roles should be saved within **Job Documents** tab further down the page.

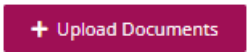
   Important: HR Admin, HR Essentials and HR Partner customers

   Please upload a copy of the employee's Application Form within this section.

Add Document

Standard documents are added and appear within the **Documents** section at the bottom of the page. These documents cannot be sent for signing but will be stored and available to view and download by the school or Trust and where the **Visible to Employee in My Portal** box has been ticked, by the employee within **My Documents** in **My Portal**.

1. Click the **+ Upload Documents** button.

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

4. For non-signable documents tick the **Visible to Employee in My Portal** box. If the document will be signable, leave this blank.
5. Tick **Create a signable document from this file after upload** to make the document signable.
6. Click the **Save** button.

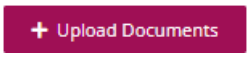
   

   The item will appear within the **Documents** section and if the **Visible to Employee in My Portal** box has been ticked, within the employee's **My Documents** section.

Add Signable Documents

The process for adding Signable documents starts within the **Documents** section at the bottom of the page but will appear once the signable process has been completed within the Signable Documents area at the top of the page. These documents will be sent for signing and available to view and download by the school or Trust and by the employee within **My Documents** in **My Portal**.

1. Click the **+ Upload Documents** button.

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

4. 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.
5. Tick **Create a signable document from this file after upload** to make the document signable.
6. Click the **Save** button. Additional fields are displayed.

7. In the **Name** field, enter a name.
8. In the **Message** field, enter a message.

   This can be over-written with a bespoke message.

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

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

10. Leave the **Document** field blank as the document has already been selected.
11. From the **HR User Notification** drop-down menu, enter the email address of any users that should receive a notification when the document has been signed or read.

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

12. 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. If selected the school signatories will be able to view this document within **My Documents** within **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

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

Add Signatories

Important

A representative for the school or Trust (Employer) should be added as the first signature. If multiple representatives 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 signing on behalf of the school or 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 relevant approach.

   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 **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.

   Please note the document has not yet been sent. Follow the next step to sign the document.

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.

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, 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**.
4. In the **Employee Search**, enter the name of the employee you wish to view. A list of employees matching the search criteria are displayed.



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



9. 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**.

10. 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 whether the document has been read and signed by each party.


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

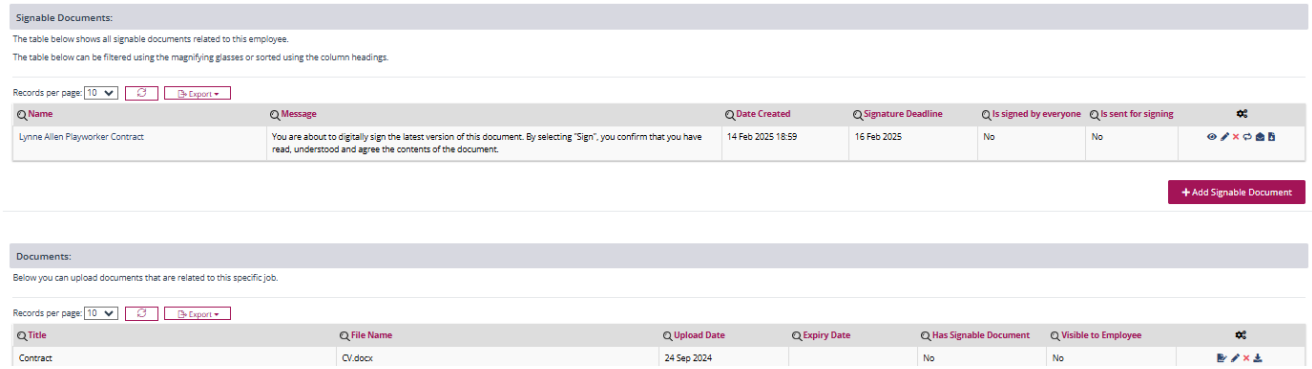

Click this icon to download the document.

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 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.

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.

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.

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.

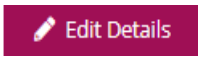
 Click this icon to make the document signable.

 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.

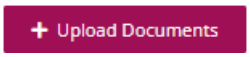
   

3. Select the **Job Documents** tab. You will now be in Edit mode.

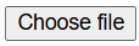
   This area allows you to store documents related to the specific role selected. Documents that relate to the overall employee should be saved within **Employee Documents** tab further up the page.

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 Documents

1. Under **Signable Documents** click the **+ Add Signable Document** 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. If selected the school signatories will be able to view this document within **My Documents** within **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.

Add 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 **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 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.

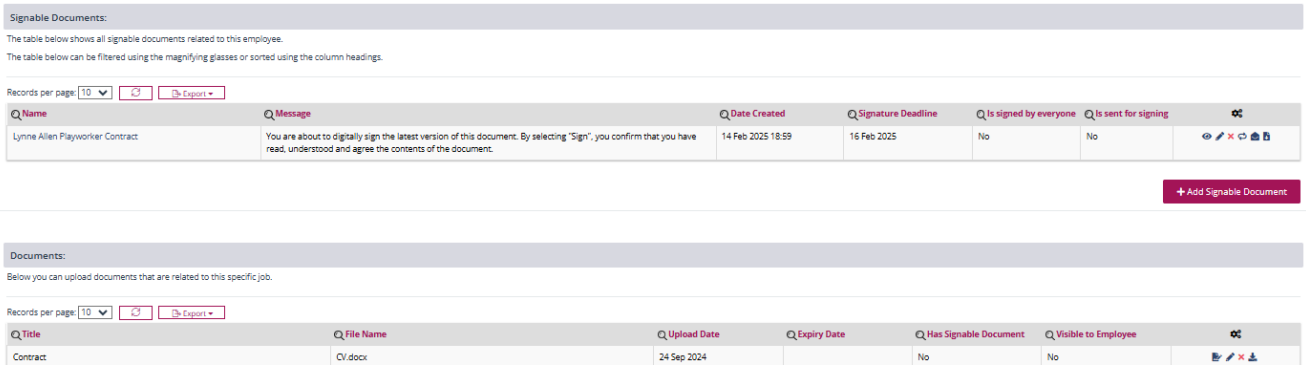
If the employee rejects the document, the user who has sent the document to be signed will not be notified. Therefore, ensure you have processes in place to receive feedback and for staff to notify you if they have rejected a document. It may be useful to create a task for yourself as a reminder.

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.

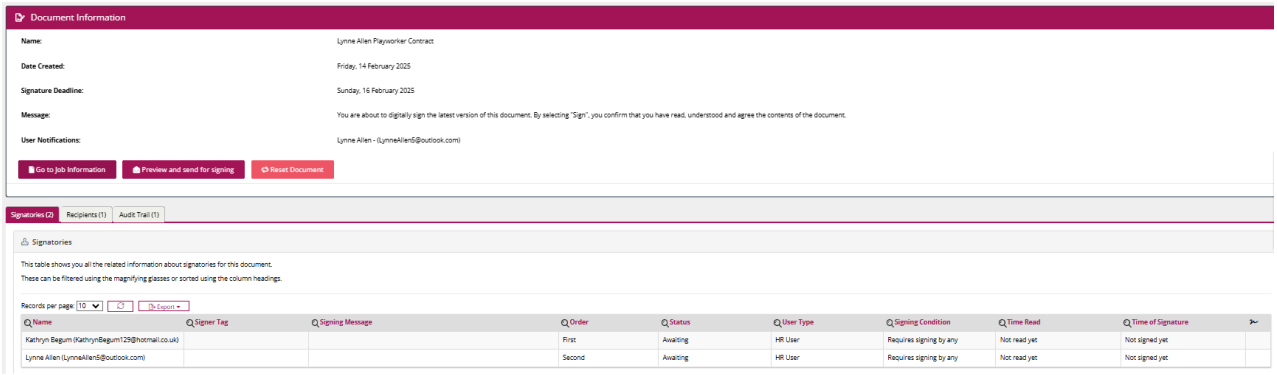
Other actions within Signable Documents

- 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.

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**.

A full Audit Trail of the document can be viewed by clicking on the **Audit Trail** tab within this section.



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**.
4. In the **Employee Search**, enter the name of the employee you wish to view. A list of employees matching the search criteria are displayed.



5. Click the eye icon on the far right-hand side of the employee you wish to view. The employee record is displayed.
6. On the left-hand side of the **Employee Details** page, from the **Select Job Role** drop-down menu, select the relevant job role.
7. Select the **Job Documents** tab.
8. Click the **Edit Details** button.
9. Edit Details **nt 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**.
10. 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 whether the document has been read and signed by each party.

     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.

Probation

Probation information is not mandatory but not completing this section may have an impact on HR Admin customers. HR Admin customers should ensure all relevant sections are completed.

1. Select the **Probation** tab within the **Employee Record**.
2. Click the **Edit Details** button.

   Edit Details
3. In the **Probation Length** field, enter a number and select from **Days**, **Weeks** or **Months**. The **Probation End Date** is automatically updated.
4. In the **Probation Meeting Frequency** field, enter a number and select from **Days**, **Weeks** or **Months**.
5. Tick the **Passed** box if the employee has passed their probation.

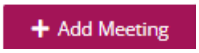
6. Tick the **Extension** box if the probation should be extended and in the **Length of Extension** field, enter a number and select from **Days**, **Weeks** or **Months**.
7. Tick the **Include Holidays in Probation Length** box if this applies.
8. Click the **Save** button to finish.



Incomplete probation information will be displayed within the **Incomplete Records** page.

Add Probation Meeting

1. Click the **+ Add Meeting** button.



2. In the **Expected Date** field, enter the date you expect the meeting to take place.
3. In the **Meeting Date** field, enter the date the meeting took place.

   This date can be updated after the meeting has taken place.
4. In the **Meeting Number** field, enter the number, i.e. 3 for the 3rd meeting.
5. In the **Notes** field, add any relevant notes.
6. Click **Save**.

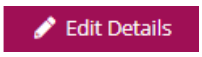


Tasks

Tasks can be created within the **Tasks** tab of the **Employee Record**. These can be bespoke tasks specific to the employee, or **Task Templates**, set for all starters. Tasks can also be added within the **Task Management** module. The tasks displayed here relate to the specific job role selected. For all general employee tasks refer to **Task Management Summary**.

View and edit tasks

1. Select the **Tasks** tab within the **Employee Record**. The tasks related to this employee's role are displayed.
2. Click the **Edit Details** button.



3. From the **Select Job Role** drop down, select the job role relating to the tasks you wish to create.
4. Click the pencil icon to edit the task.
5. Update the information and click the **Save** button to finish.



Add task

You can either add a new task or add a task from a template.

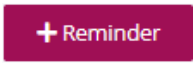
1. Click the **+ Add Task** button. A new window is displayed.



2. In the **Task Title** field, enter a title.
3. In the **Description** field, enter a description.
4. From the **Assign** To drop-down menu, select the person you wish to assign the task to.

   The task can be assigned to both the employee you are viewing and other relevant employees.

5. From the **Assign To User Group** drop-down menu, select the user groups you wish to assign the task to.
6. In the **Due Date From Start Date** field, enter a number and select from **Days** or **Weeks**.
7. Tick the **One or Many Tasks** button if you wish for each of the assigned users to complete the task. If this box is left unticked, only one of the users assigned must complete the task for the task to be marked completed.
8. Click the **+ Reminder** button to set a reminder for the user(s).



9. In the **Title** field, enter a title.
10. In the **Description** field, enter a description.
11. In the **Notify before Due Date** field, enter a number and select from Days or Weeks.
12. Tick either or both **Notify by Email** and **Notify by Popup** boxes.
13. Click the **Save** button. The window closes.



14. Click the **Save** button to finish.



Add task from Template

1. Click the **+ Add Tasks from Template** button. A new window is displayed.



2. From the **Templates to Apply** drop-down menu, select all templates to apply. These are configured within **Employee Settings**.
3. Click the **Save** button to finish.



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.

Employee Communication

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**.*