Adding a New Employee (Teaching Staff)

EPM Connect Guide

Document Control

Document Overview: This document outlines the step-by-step process for adding a new teacher 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 will automatically appear as checks to be completed within this section as they are mandatory. Scroll down and select any additional checks listed and speak to your Implementation Team should you need any additional checks to be added.

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 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.

   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.

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.

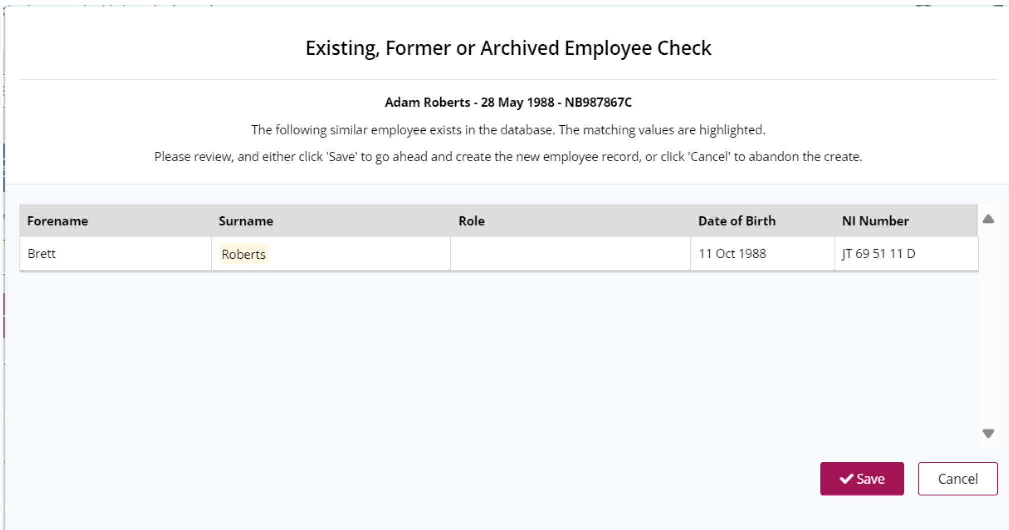
   

The **Edit Employee** page is displayed with the employee's **Personal Information**.

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** for more information.

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 show 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.

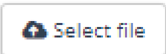
4. In the **Teacher Number field**, enter a teacher number.

   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.

    Save

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**.

Qualifications

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

Qualifications are 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 for teachers, including fields relating to QTS and ECT Status and for HLTAs.

ID & Other Checks

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

Select the **ID & Other Checks** tab on the left-hand side of the page. Complete the 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

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 check. The details for completion are displayed.

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**.

You are also able to view and upload signable 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 **Employee Documents** tab on the left-hand side of the page.

   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.

   HR Admin customers

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

2. Click the **Edit Details** button. The page will refresh, and the fields will become editable.

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

Add Document

1. Click **Edit Documents**.

2. Select the **Employee Documents** tab. The **Job Documents** page is displayed.
3. Scroll down to **Employee Documents** and click the **+ Upload Documents** button.

4. In the **Title** field, enter the title.
5. Click **Select** file.

6. In the **Expiry Date** field, select a date.
7. 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.
8. Tick **Create a signable document from this file after upload** to make the document signable.
9. Click the **Save** button.

10. 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. Click **Edit Details**.

2. Select the **Employee Documents** tab. The **Employee Documents** page is displayed.
3. Scroll down to **Documents** and click the **+ Upload Documents** button.

4. In the **Title** field, enter the title.
5. Click **Select** file.

6. In the **Expiry Date** field, select a date.
7. Leave the **Visible to Employee in My Portal** box blank.

   This will automatically be made visible to the employee after signing.

8. Tick the **Create a signable document from this file after upload** if you wish to make the document signable.
9. Click the **Save** button. The screen refreshes and new fields appear.

10. In the **Name** field, enter a name.
11. In the **Message** field, enter a message.

    This can be over-written with a bespoke message.

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

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

13. From the **Document** drop-down menu, select a document.
14. 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.

15. 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

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

Add Signatories

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 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 an option.
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.

9. 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.

10. Click **Send**.

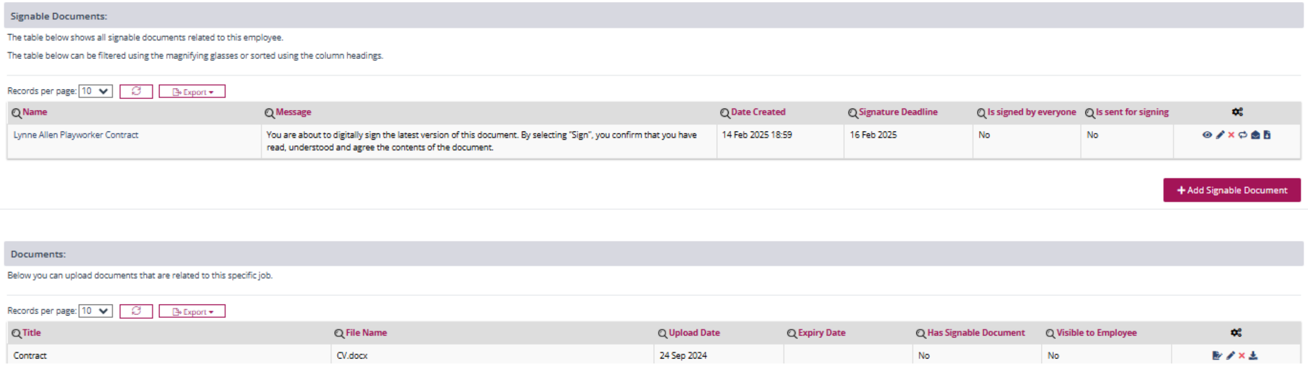
> The document will now be sent to the school signatory to sign. This will appear as a **Task** within the **Task Management Module** and within **My Tasks** within **My Portal**.
>
> Once this has been completed, it will be sent to the employee to sign.
>
> Once signed by both parties, the document 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 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.



- Click the cross icon to delete the document.
- Click this icon to download the document.

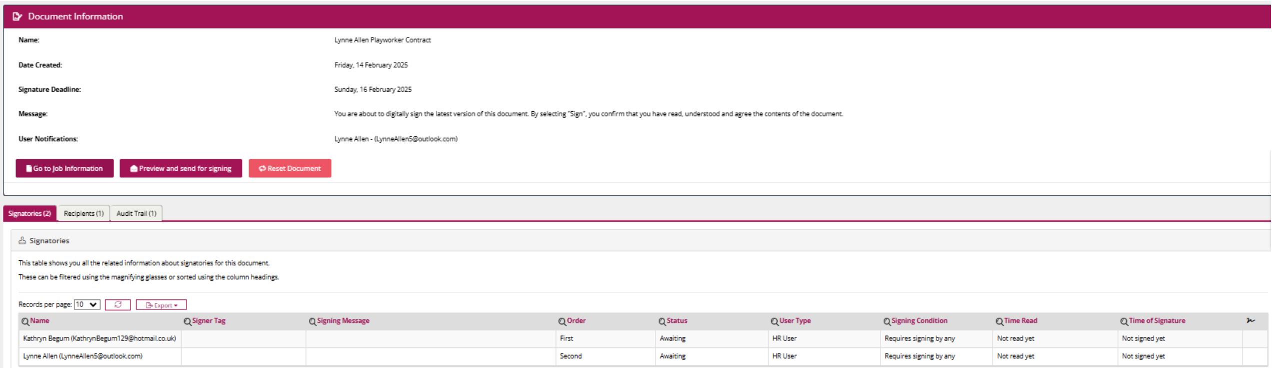
Other actions within Signable Documents

- 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**.

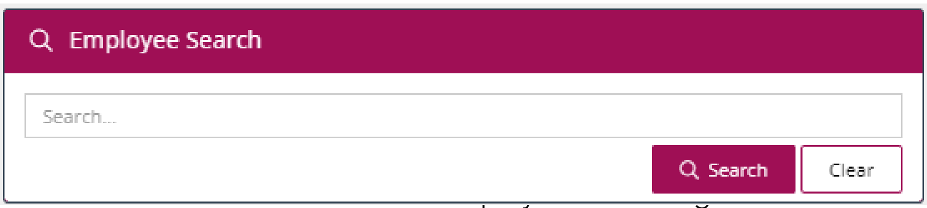
A full Audit Trail of the document can be viewed by clicking on the **Audit Trail** tab within this section.



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. 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.

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 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. 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** within the **Employees Module Guide** for more information.

6. From the **Reports To** drop-down menu, select the Line Manager.

   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.

   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. Go to **Employee Settings** to create a variety of starter tasks to choose from.

10. 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 Resource Centre provides a separate, simplified guide for adding Casual employees.

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. Tick the **Senior Leadership Team** box, if the member of staff is a member of the SLT.
13. 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 (for example roles undertaken within Local Government or the police).

14. 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.

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

    If the role is temporary or fixed term, in the **Temporary Reason** field, enter the reason for the role's temporary status. For example, Pupil Numbers.

Important

If the temporary reason is related to cover or support role relating to Family Leave or Named Child Support, please enter the word **Maternity Cover**, **Shared Parental Leave Cover**, **Named Child**, **Sickness Cover** and **Adoption Cover** within the **Temporary Reason**.

The reason provided will be included within letters and contracts.

16. From the **Contract Hour Type** drop-down menu, select a contract hour type.
17. 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**.

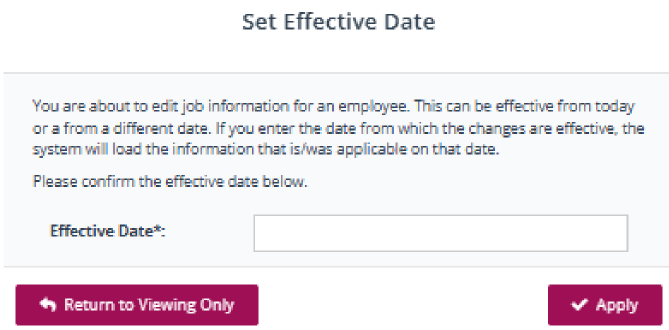
Job information

Some of these details 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 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.

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

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.
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**. 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 a job description.
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

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

    This should only be completed if the role has ended.

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

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

    This is the date the member of staff starts/started at the school, not within this role. For example, if the person has recently worked within or currently works within the organisation within another role.

16. 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**.
3. From the **Override Sick Leave Policy** drop-down menu, select the option that applies.

   Select the appropriate sickness policy for paid absence from the drop-down list, if this is different to your standard policy. These policies are set up within **Employees Settings**.

4. If using your standard policy, select **Not overridden**.
5. 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

Work pattern is used to calculate holiday and absences.

> **Important**
>
> Work Pattern is mandatory.

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.

   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.

3. 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.

4. 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**.

5. In the **Start Time** field, enter a start time.
6. In the **End Time** field, enter an end time.
7. 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

8. 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 in order to view the entitlement weeks.

9. 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.

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

Absence Approver Tags

Here you will select the users who will approve the 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 *e.g. Jury Duty, Bereavement, Maternity 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 Customers

Once the **Job Information** has been completed, 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**.

Salary Information must now be completed in order for your EPM teams to manage your monthly HR Admin and Payroll processes.

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 **YES**.

Important

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

A number of fields will be auto-calculated once the following fields have been completed:

- Contract Hours
- FTE Hours
- Working Weeks
- FTE Weeks

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

   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.

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

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

   This is a description of the reason for the Protected Weeks, for example to match a TUPE agreement.

5. From the **Working Pattern Pro Rata Rule** drop-down, select **365 Rule**.

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

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

   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, enter 5 hours as the average Monday hours.

7. Tick the **Eligible For Pay Progression** box if relevant.

   This is not a mandatory field.

8. The **Salary** field will be auto populated after a **Pay Range** and **Pay Scale** have been calculated.

   The **Salary** field will only be editable if the **Spot Rate** toggle has been changed to **YES**, otherwise this will be auto calculated.

Leadership Pay

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.

Bank Details

1. Complete the employee's bank details.

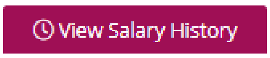
   This can also be updated by the employee within the **Salary information** section of **My Profile,** in **My Portal** as part of our self-service feature.

   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..

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 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.

Add a new addition

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

   + Add Addition

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** drop-down menu, enter an amount or click the **Use Default** button to auto-calculate the amount.

   Use Default: 1000.00

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**.

   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**.

   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.

   + Add Line

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

   Use Default: 1000.00

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**.

   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.

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. Select the **Job Documents** tab on the left-hand side of the page.

   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.

2. Click the **Edit Details** button. The page will refresh and the fields will become editable.

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

Add Document

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

2. In the **Title** field, enter the title.
3. Click **Select** 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. Click **Edit Details**.

2. Select the **Employee Documents** tab. The **Employee Documents** page is displayed.
3. Scroll down to **Documents** and click the **+ Upload Documents** button.

4. In the **Title** field, enter the title.
5. Click **Select** file.

6. In the **Expiry Date** field, select a date.
7. Leave the **Visible to Employee in My Portal** box blank.

   This will automatically be made visible to the employee after signing.

8. Tick the **Create a signable document from this file after upload** if you wish to make the document signable.
9. Click the **Save** button. The screen refreshes and new fields appear.

10. In the **Name** field, enter a name.
11. In the **Message** field, enter a message.

    This can be over-written with a bespoke message.

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

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

13. From the **Document** drop-down menu, select a document.
14. 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.

15. 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

16. 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

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

10. From the **HR or Bureau User** drop-down menu, select **HR User**.
11. 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**.

12. 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**.

13. 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.

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

1. 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.

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

16. 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 an option.
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.

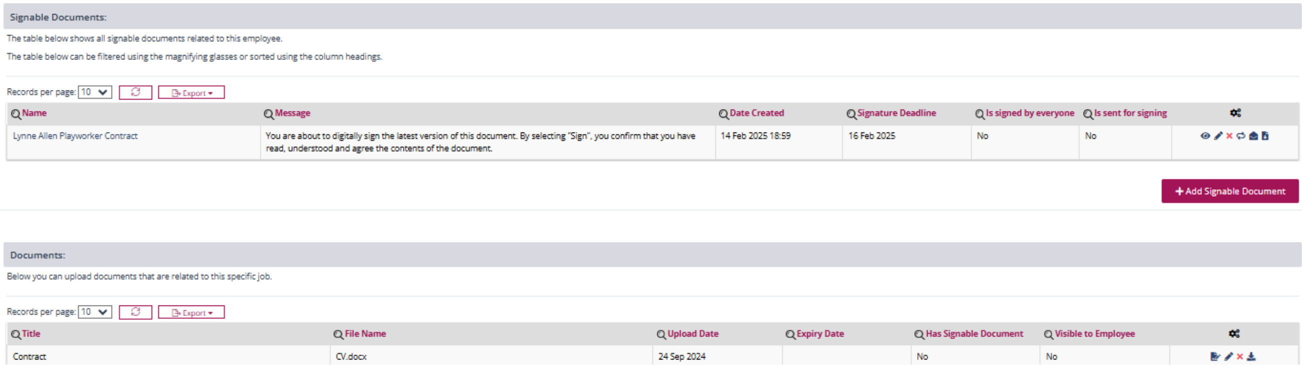
If the employee rejects the document, the user who has sent the document to be signed will not be notified. Therefore, ensure you have processes in place to receive feedback and for staff to notify you if they have rejected a document. It may be useful to create a task for yourself as a reminder.

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.



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.

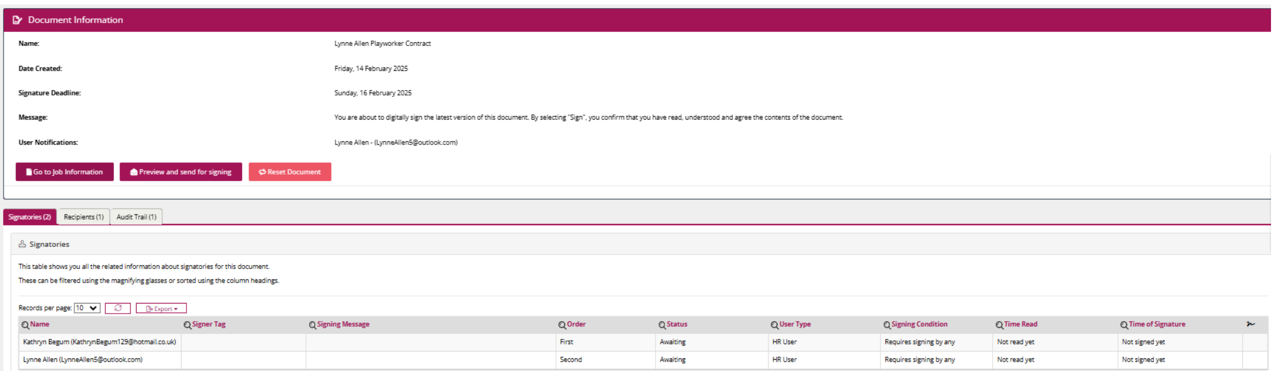
Click this icon to reset the document. This will reset (remove) the signing process and all existing signing data. This is useful if a document has been sent to an incorrect signatory or the wrong document has been sent.

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. 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.

Probation

Probation information can be added against each role held, however this is not a mandatory section.

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

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**.

7. Click + **Add Document** to add a relevant document.

8. In the **Title** field, enter a title.
9. Click **Select file** to upload a document.

10. Click **+ Upload Document** to save the document.

11. 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

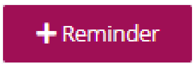
You can either add a new task or add a task from a template.

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.