

# Adding a casual role

## EPM Connect Guide



# Document Control

**Document Overview:** This document outlines the step-by-step process for adding a new casual role to a current employee in 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 23<sup>rd</sup> March 2026 and is issued on a version-controlled basis under her signature.

## Document History

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## Add a new casual role

New casual roles for employees can be added within the employee record.

### HR Admin Customers

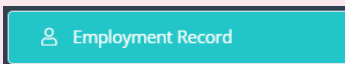
Once a new role has been added please follow the [Contracts and Letters Guide](#) to create a new contract and/or letter.

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 **All Employee**. The **All Employees** page is displayed.
4. In the **Employee Search** bar on the top right-hand side of the screen, enter the name of the employee you wish to manage. The relevant employee will be displayed within the **Employees** table.
5. Click the **Forename** of the employee you wish to manage. The relevant **Employee Record** is displayed.

### Important

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

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



6. Scroll down and in the **Select Job Role** section, click the **+** button. A new window is displayed.



7. 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.

8. In the **Job Title** field, enter a job title.
9. In the **Start Date** field, enter a start date.
10. 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 will move into **Previous Employment**. However, if the employee is a leaver, you must manually process the employee as a leaver. We therefore recommend setting a task within **Task Management** as a reminder. See the **Resign Employee** section within the **Employees Module Guide** for more information.

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

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

12. 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**.

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

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

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

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

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

16. 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.

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

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

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

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** 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.

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

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

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

 Add Job Role

## Job information

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

### HR Admin Customers

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

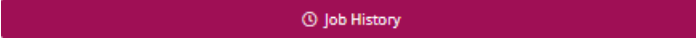
### Effective Date

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

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

### Job History

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

A rectangular button with a dark purple background and white text that reads "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 following guide includes the key information required and does not include pre-populated fields or non-mandatory information.

1. From the **Department** drop-down menu, select a department.
2. In the **Property** field, ensure the correct property is selected.

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

3. From the **Reports To** drop-down menu, select the person the employee reports to, eg. Line Manager.

This will be used in various modules for authorisation purposes where Line Manager is selected.

4. Leave the **Include In The School Workforce Census** box unticked.

If this is unticked, the role will not be included within the Workforce Census.

## Salary Information

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

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

## Basic Pay

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

1. In the **Pay Start Date** field, select a date.
2. From the **Pay Range** field, select a range.

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

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

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

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

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

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

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

## Bank Details

1. Complete the employee's bank details only if this is the employee's primary job.

### Important

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

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

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

## Pension

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

### HR Admin Customers

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