

# Add a new teaching role

## EPM Connect Guide



# Document Control

**Document Overview:** This document outlines the step-by-step process for new teaching 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

<b>Date of Change</b>	N/A
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## Add Job Role

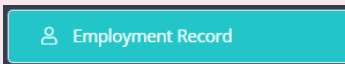
New casual roles for employees can be added within the employee record.

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 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.

11. 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**.

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.

**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.

15. 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.

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

18. 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).

19. 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.

20. 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.

21. From the **Contract Hour Type** drop-down menu, select a contract hour type.
22. Click the **+ Add Job Role** button. The window closes and the employee record is displayed.

 Add Job Role

### 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 details will have auto-populated from the information entered 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.

#### Set Effective Date

You are about to edit job information for an employee. This can be effective from today or a from a different date. If you enter the date from which the changes are effective, the system will load the information that is/was applicable on that date.

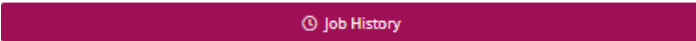
Please confirm the effective date below.

Effective Date\*:

## Job History

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

 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. 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.

+ Add 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.

+ Add Approver Tag

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.

+ Add Absence Approver Tag

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

Save

## 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

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.

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 pay point. If the point you need is not visible, select a different **Pay Range**.
4. 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.

5. In the **Protected Weeks** field, enter the number of weeks.  
This will not usually apply. If you think this may apply, please contact your HR Team via the chat.
6. In the **Protected Reason** field, enter the reason.  
This is the reason for the **Protected Weeks**, for example to match a TUPE agreement.
7. 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.

8. 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.
9. Tick the **Eligible For Pay Progression** box if relevant.  
This is not a mandatory field.
10. 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 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.

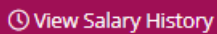
This can also be updated by the employee within the **Salary information** section of **My Profile**, in **My Portal** as part of our self-service feature.

**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.

**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.

## 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

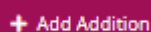
Deductions cannot be added within this section. These are managed by your EPM team. If you wish to add/amend/delete a deduction, please send a request via the EPM Client Communication Platform.

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

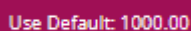
1. Click the **+ Add Addition** button.



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.



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**.



## 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.

## HR Admin Customers

Once a new role has been added please follow the **Contracts and Letters Guide** to create a ne