Contracts and Letters

EPM Connect Guide

Document Control

Document Overview: This document outlines the step-by-step process for managing contracts and letters 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 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 made to improve clarity.
New Version Number	v2.0
Changes to be notified to	Director of Operational Excellence

Contents

Overview

Employee contracts and letters can be created via **Workflows** within the **Employee Record**. Changes which require a new contract or letter include:

- Contracts for new employees/roles
- Any salary change, or change to hours
- Job category change
- Resignations

To create a contract or letter, follow the guide below.

Step 1: Updating information within the Employee Record

The first step is to make the required changes to the **Employee Record**.

1. From the left-hand side of the system, select on **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 Information** tab.
8. Click the **Edit Details** button.

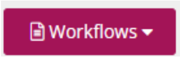
9. Make the required changes.
10. Click **Save**.

Step 2: Initiate the workflow

Once the changes have been made to the employee record, the next step is initiating the workflow. Workflows create a number of tasks for your EPM HR Admin Team and/or the school/Trust.

1. Click the **Return to Viewing Only** button.

2. Click the **Workflows** button at the top of the screen. A list of workflows is displayed.



3. Click on the title of the relevant workflow.

   The following workflows are available:

   – Job Category Change

   – Extend or Remove Additions – tasks and letters

   – First Contractual Enrolment

   – Leave Appointment – tasks and letters

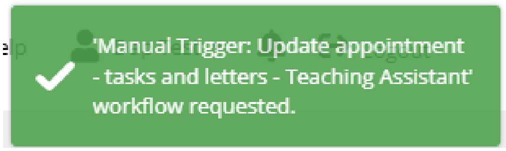
   – New Addition – tasks and letters

   – New Appointment – tasks and contract generation

   – Update Appointment – tasks and letters

   Please note that the workflow includes the job role as part of the workflow title so if the employee has more than one role, please ensure you select the document for the correct role.

4. A green confirmation message will appear in the top right-hand corner of the screen. This message will disappear within a few seconds.



   Clicking on a workflow title will initiate the relevant workflow.

   If the green confirmation message does not appear wait 1 minute and click the **Workflow** button again. This may create a duplicate task but this can be marked as completed and a response added to show this duplicate has been created in error.

   If the problem persists speak to your EPM team.

Step 3: View Task

Once the workflow has been initiated, the majority of workflows will automatically create a task for the school/trust (with the exception of job category changes).

Please note some tasks are performed by your EPM Team.

The task may take a few minutes to appear.

Important

The task information will need to be viewed within **Task Management**, we therefore recommend opening **Task Management** within an additional tab within your browser, as you will need to return to the **Employee Record** once the task has been viewed.

1. From the left-hand side of the system, click on **Task Management**. A list of further options is displayed.
2. Select **All Tasks**. The **All Tasks** page is displayed.
3. Select the **All Tasks** tab. All tasks within the system are displayed in alphabetical order.
4. Click on the relevant task **Title**. The **Task Details** page is displayed.

   If filtering the data, please note **Due Date** relates to the expected completion date of the task.

5. Read the details related to the task.

Step 4: Create the contract or letter

The majority of workflows will create a task which includes the production of a contract or letter. This can be created within **Job Documents**, within the **Employee Record.**

1. Click on the previous **Employee Record** tab within your browser.
2. Click the **Reports** button.
3. Click on the title of the relevant **Report**.

   The search bar can also be used within the drop-down menu. For example, entering teacher for teaching contracts.

   Important

   Do not change any of the **Employee Filters**, these are not relevant to the letter.

4. Click the **Download** button. The download will appear within your computer's download files.

   The document name will be the employee's full name followed the document name.

5. Click the download icon at the top of your browser.
6. Open the relevant document and review the contents.

Missing or incorrect information

Check the document for missing or incorrect content. Should any of the information within the letter or contract be missing or inaccurate you will need to repeat the steps from the beginning of this guide to update the information within the relevant section.

The inclusion of **NOT SET** or fake date within the document indicates that a certain field has not been completed. The majority of these fields relate to fields within **Salary Information** or **Job Information** or **Additions and Deductions** however this may also relate to fields within **Employee Settings**. If unsure, speak to your EPM Team.

If any information such as the calculations appear to be updated, due to a change in Holiday Entitlements etc, please speak to your EPM Team as these settings will need to be adjusted by EPM.

Step 5: Create Signable Document

1. Select the **Job Documents** tab. The **Job Documents** page is displayed.
2. Click **Edit Details**.

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. The **Expiry Date** field does not need to be populated.
7. Leave the **Visible to Employee in My Portal** box blank.

   The document will automatically be made visible to the employee after all school signatories has signed it.

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. If you wish to change the default message, please speak to your EPM Team, who will manage this within **Main Settings**.

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

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

13. The **Document** field will have already been added within the previous screen.

14. From the **HR User Notification** drop-down menu, select the email address of the employee the document relates to and where relevant Line Managers who you wish to receive notifications.

    Selected users will receive an email notification whenever any action has been taken, for example the document has been signed or read. Notifications should be set up within **Employees Settings**.

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, 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

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

2. From the **HR or Bureau User** drop-down menu, select **HR User**.
3. From the **Users** drop-down menu, select the user that apply.

    Select the email address of the user who will be signing on behalf of the school. Alternatively select **Signer Tags**.

4. From the **Signer Tags** drop-down menu, select the signer tags that apply.

    Signer Tags allow you to set up groups of signatories, for example the Line Manager related to the account or the HR Team.

    Signer Tags are set up in **Employee Settings**. See **Employees Settings Guide**.

5. From the **Approval Condition** drop-down menu, select the approach that applies for document to be classed as approved.

    Requires signing by All: Requires each user or signer tag to sign the document.

    Requires signing by Any: Requires just one user or signer tag to sign the document.

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

    This will allow the employer to sign first on behalf of the school or Trust. The employee will not be able to view or sign the document until all other signatories have signed the document.

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

   Save

8. Repeat the process for all additional employee signatories.

Add Employee Signature

You should now repeat the process for the Employee.

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

   + Add Signatory

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

   Save

8. Click the **Save** button within the main page.

   Save

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**.

   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 by all school signatories, 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.

Step 6: To complete the task

Once you have sent the document for signing you can mark the task as complete.

1. From the left-hand side of the system, click on **Task Management**. A list of further options is displayed.
2. Select **All Tasks**. The **All Tasks** page is displayed.
3. Select the relevant task.
4. Click on the relevant task **Title**. The **Task Details** page is displayed.
5. From the **Status** drop-down menu, select **Complete**.
6. In the **Response** field enter any relevant notes.

   Responses will be shown within the **Responses** tab and along with the information displayed within the **Audit Trail** tab, providing a useful summary of actions completed against this task.

7. Click **Save** to finish.

Step 7: 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 and restarts the signing process.
    - 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.

Troubleshooting

I'm unsure whether the document has been signed by all parties

Follow the **Check the progress of the contract or letter** guide above.

I can't find the relevant task.

Please note, **Job Category Change** will not create a school/trust task, when activating this workflow, there is no follow up task to complete.

Some tasks take a while to upload. Give it time and if in doubt re-click the **Workflow** button within the relevant **Employee Record** and reselect the relevant workflow. This may create a duplicate task but the duplicate can be marked as complete to remove it.

If the task does not appear, speak to your EPM HR Team if you still can't find the Task.

I'm unsure whether I clicked the Workflow button

If you are unsure, first check **Tasks** to see if a task has been sent to you. If in doubt re-click the **Workflow** button within the relevant **Employee Record** and reselect the relevant workflow. This may create a duplicate task but the duplicate can be marked as complete to remove it.

NOT SET or 01/01/0001 showing within the document

The inclusion of NOT SET or 01/01/0001 within the document indicates that a certain field has not been completed. The majority of these fields relate to fields within **Salary Information** or **Job Information**, however this may also relate to fields within **Employee Settings**. If unsure, speak to your EPM Team.

Dash or N/A showing within the address line

If a dash, N/A or other characters are showing within one of the address lines this will be due to a dash, N/A or other character being entered within the address line in Personal Details of the relevant Employee Record. Any address lines or other unnecessary fields in the system should be left blank, as any characters added within these fields will appear within relevant letters and contracts.

I want my letters to appear on our headed paper

Simply download the letter as per **Step 4: Create the contract or letter**. Add the letterhead to your document and save it within your files under a different name. Move to **Step 5: Create Signable Document** but when uploading the document save the version with the letterhead. Complete the remaining steps as above. Please note this headed template cannot be saved.

Can I send a contract to an employee before they have started?

Yes, employees can be added as to the system at any point ahead their start date. For security purposes, we recommend providing access only to **My Portal** (see **Adding Users and Permissions in EPM Connect**) until the employee has started. This will allow them to receive documents via **My Documents**, in addition to tasks (within **My Tasks**). You can set up a number of **Task Templates** for new starters in **Employee Settings**.