Logo, company name

Description automatically generatedHR Checklist

HR Checklist

Please find below a list of the documents that EPM require.

|  |  |  |  |
| --- | --- | --- | --- |
| Task | Guidance | Date Required By | Completed |
| **Provide staff terms and conditions**  This information is required as soon as possible | **Teachers**  Please send your HR contact the following for teachers: | | |
| Teacher pay scales | On receipt of welcome email |  |
| Leadership group salary ranges | On receipt of welcome email |  |
| TLR or management structure | On receipt of welcome email |  |
| The divisors for supply teachers’ hourly and daily rates  In the absence of this information, where known, we will use the standard divisor for the area that your school is based | On receipt of welcome email |  |
| Please advise the part month calculations/deductions. Do you require any unique calculations? | On receipt of welcome email |  |
| **Support**  Please provide the following for support staff: | | |
| Support staff scales | On receipt of welcome email |  |
| Salary formula for support staff | On receipt of welcome email |  |
| Annual leave entitlements for support staff | On receipt of welcome email |  |
| Calculation to pro rata annual leave entitlements | On receipt of welcome email |  |
| Support staff pay progression rules | On receipt of welcome email |  |
| If transferring the same month as increments are applied, whether support staff increments have been applied | On receipt of welcome email |  |
| Whether hourly rates for casual relief workers are enhanced, if so please confirm the percentage applied | On receipt of welcome email |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Fully complete and return the HR take-on spreadsheet** | We require all your staffing information to import into the integrated HR and payroll database. Please send this information to your HR and payroll contact as soon as possible. As soon as you have completed one tab please send this to us so that we can start importing your data. | | |
| Budget code template (complete first) | 6 weeks before data transfer excluding holidays |  |
| Support staff data | 6 weeks before data transfer excluding holidays |  |
| Teaching staff data  Once this has been completed you will be sent passwords enabling you to access the EPM portal so that you can check and update your staffing information | 6 weeks before data transfer excluding holidays |  |
| **Contracts** | **Teacher and Support**  Please send to your HR contact: | | |
| Examples of your current contracts for teaching and support staff | ASAP |  |
| School term dates | ASAP |  |
| Please review our: | | |
| Sample support staff contract | ASAP |  |
| Sample teaching staff contract | ASAP |  |
| **Complete the Teacher Pensions delegation form** | **Academies Only:**  Please complete this form and send back to your payroll contact.  By sending this email to TP this gives the school/trust and EPM access to the Teachers Pensions Employer Portal.  Once TP have received these details they will set up the accounts and registration emails which will be sent through to the email addresses given.  The Employer Portal allows TP and employers to send and receive data using a secure electronic facility. Users are able to access this as a facility through the employer area of the Teachers’ Pensions website: [http://www.teacherspension.co.uk](http://www.teacherspension.co.uk/) |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Policies** | Please send us the following HR policies and procedures: | | |
| Pay Policy | 4 weeks before joining |  |
| Sickness Policy | 4 weeks before joining |  |
| Maternity Policy | 4 weeks before joining |  |
| Annual Leave Policy | 4 weeks before joining |  |
| Probationary Policy | 4 weeks before joining |  |
| Notice of Termination Policy/Requirements | 4 weeks before joining |  |
| Other policies will be requested as and when they are needed | | |

**Please send me all information listed above as soon as possible so that we can ensure the set-up is fully complete in advance of the commencement of the contract with EPM.**

If you have any questions in regards to completing these documents or providing the information, please do not hesitate to get in touch with your HR contact who will be happy to assist you.