FAQs

EPM Connect Guide

Document Control

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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.

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FAQs

My Portal

Do you need to buy My Portal separately?

No, **My Portal** is the employee's area of the system and the access to modules reflects the modules bought by the school or Trust.

What elements of self-service are available?

As standard, employees will have access to **My Summary**, **My Profile**, **My Tasks**, **My Account** and the **Employee Directory** and can update **Contact Details**, **Next of Kin** and **Bank Details**. Should the school upgrade to the **Enhanced Absence Management** and/or **Time & Expenses** module, their employees will also have access to self-service functionality within these modules, with the ability to submit their own absences, time & expense claims and timesheets. Employees from schools who buy the **Performance Management** and **Training & CPD** modules will be provided with self-service access to these modules.

General

Can a module be seen only by the Trust but not schools for example, Recruitment, Case Management or Trust Management?

Yes, if a Trust want to manage on behalf of their schools, this can be managed via permissions, which will be agreed during Implementation.

Where the system allows reminders/notifications, is this just within the system or can email notifications be set up?

When manually creating a task, you can choose to set up either system or email notifications.

Can you purchase an additional module on a temporary basis?

Modules can be purchased as an when you require them. The minimum purchase period for additional modules is 12 months for any module.

Employees

Does any of the data in the Employee Record get deleted?

Employee Records and most other elements are archived rather than deleted. Other items, for example **Additions** and certain settings can be deleted.

Can I sign documents via the system?

Yes, **Signable Documents** (contracts/policies) can be uploaded within both **Employee Documents** and **Job Documents** within the **Employee Record**. Set up signatories and once sent, a task will be sent to relevant users/employees to sign. Progress of the document status can be tracked easily within this section of the **Employee Record**.

Can I reinstate employees that I have previously resigned?

Yes, you can reinstate an employee by beginning the **Add a New Employee** process and linking the employee to the email held by a previous employee. A new role should be added for the employee.

Can I reinstate archived employees?

Yes, you can restore archived employees by clicking **Restore Employee** in the **Archived Employees** section of **All Employees**,

Do incomplete records on the employee module relate to the SCR module?

No, this is a separate section designed to ensure that employee records are kept up to date. You can select the fields which are deemed incomplete in **Employee Settings**.

Does the Post section in the employee module relate to the recruitment module?

Yes, **Posts** need to be created before creating a vacancy. The **Posts** section can also be used to create an approval process for new posts. **All Posts** will display an overview of all posts and whether they are filled or unfilled. They can also be used to create an organisation chart within **Posts Map**.

Does the system display the pro rata salary for a part time member of staff?

Yes, this is displayed within the **Salary Information** tab of the **Employee Record**.

Is there is a report to show any changes that have been made within My Portal or to Employee details.

Yes, the **Audit** section within each module highlights all changes made and actions undertaken and can be exported by clicking **Export**.

If an employee updates their personal details - address/bank details, will the Super Admin or Line Manager receive a notification?

Yes, this can be set up in **Admin - Notification Settings**. You can set up notifications for specific **Users** or **User Groups** for **Personal Information**, **Bank Details**, **Probation Reminders** and **Leaver Notifications**.

Why does a pop up asking for an Effective Date come up every time I look at Job Information and Salary Information in an Employee Record when in Edit mode?

The **Effective Date** pop up appears when viewing these two tabs in edit mode, as any changes will affect Payroll and therefore the system needs to understand when these changes will come into effect.

How do I edit a letter or contract once it has been sent for signing?

Once a document has been sent for signing, the document cannot be edited. Clicking the pencil icon will only allow you to edit the process for signing. To edit the document itself, you will need to delete the original document (which will delete the **Audit** trail of signatories) and re-click the **Reports** button to download the document. Once downloaded you will then need to re-add as a signable document.

How are holiday weeks entitlements managed?

EPM will set these up during Implementation, adding employees to specific groups for each **Holiday Weeks Entitlement**, however users can also view the entitlement of each employee within the **Employee Record**.

Can you view the entire employee record for previous employees and previous roles?

Yes, you can view all the information for both archived and previous employees, plus information related to previous roles held by current employees and previous employees.

Can I add notes about emerging cases within the Employees module.

No, we would recommend adding these within the **Case Management** module, as it is important to limit visibility.

Absence Management

What's the difference between Core Absence Management and Enhanced Absence Management?

Our **Core Absence Management** module allows users to view absence records and recent absences, input absences on behalf of employees, bulk import absences and view team calendars. Our **Enhanced Absence Management** Module provides all of the above, with additional self-service functionality, allowing employees to submit their own holiday, general absence and TOIL for approval, plus the ability to set and view triggers and view additional analytics.

Is there a template for Return to Work forms? Can I use my own?

There is a standard screen for **Return to Work** which can be accessed from within the absence record. There is also the option to upload a bespoke Return To Work form document if that is the preference.

Is a task generated for Return to Work and Self Certification forms?

Yes, these will be generated automatically when an end date is provided within a sickness absence. For enhanced module users, the Self Certification task will be sent to the relevant employee. These will appear in **My Tasks**. For core module users, the task will be sent to the admin user.

Can we disable Return to Work and Self Certification forms?

Yes, tick the **Disable Return to Work** and **Disable Self Certification** tick boxes at the bottom of the absence. The **Return to Work** and **Self Certification** buttons will still appear within the absence but tasks will not be generated to complete them.

Can absences integrate with outlook calendars?

No, however you can view all absences within the **Team Calendar** within **Absence Management**.

We have a policy which states all non-urgent absence must have 10 days notice, can this be built into the employee's self-service function to block requests to come through without enough notice?

These cannot be blocked, however a header and footer can be added to this note within the self-service employees view. We would therefore also recommend that this element of your policy is shared regularly with your teams. You could add a task, which is sent out asking your employees to read this information.

If a user enters an employee sickness, will the Line Manager receive a notification?

Yes, they will receive notifications for the following (these can be configured within **Absence Settings**):

- **Absence Approval** - Employee receives an email notification to inform them a general absence/Holiday/Toil request has been approved.
- **Approval Requests** - **Line Managers** and **Users** with **Approver Tags** will receive an email notification that an absence requires approving.
- Once an absence has ended the line manager will receive an email notifying them a **Return to Work** form is required.

Can absence triggers be set to differentiate between teachers and support staff?

No, not currently.

Can we create our own triggers?

Yes, with the enhanced module you can set and create your own triggers specific to your school/trust, including Bradford Factor triggers and informal triggers.

Am I able to store historical absences on the system?

We will upload the last 12 months of absence but we do not advise on adding in more data after the onboarding period as this may affect the sickness payments.

Does the system allow me to add different policies for different people?

Yes, we will have added in the standard policies included within the burgundy and green book however, during onboarding if you let us know the policies you have we can assign these to the appropriate employees.

How does the system recognise nil/half pay for teachers?

The system uses working days to calculate absence and ignores holidays/inset days. This is set up during Implementation. When adding an absence, if the employee reaches the point of nil or half pay, this will be displayed at the bottom of the absence.

Are we able to download an absence report for individual employees to provide to our Staff Absence Insurance Company?

Yes, these can be downloaded into either **Word** or **Excel** formats by clicking the **Export** button above the table in **List View** within the individual employee's **Absence Record**.

When inputting absences, are we able to see and amend earlier absences for the whole year?

Yes, this can be viewed within **Absence Instances**. You can go back and amend any sickness absences and any changes will be shown within the audit trail.

Are absences based on calendar days or working days?

Absences are calculated in working days. The number of working days lost will be suggested automatically when adding the absence and shown as a decimal.

Can we record absences with specific times and related to specific roles?

Yes, you can enter exact start and end times and also select the specific role the absence relates to. The suggested number of working days (to two decimals) lost will be provided when adding the absence.

Can you set triggers for specific types of absence, for example Childcare or lateness?

No, these only apply to **Sickness** absences. The recommended internal process for an absence request should be to review their previous absence history before approving; for example if Bereavement leave is capped at 2 days per year, the user should view previous absences and ensure there have been less than the total number advised within the policy before approving. The **Team Calendar** can also be used when reviewing absence requests.

How will unpaid leave be added?

Unpaid absence will generally be added by Superusers/Admin rather than the employees. However should they be added by an employee, both paid and unpaid versions of all relevant absence types will be displayed. If the incorrect absence type is provided, approvers can ask for changes to be made when approving the absence by selecting **Changes Required** and including details of the recommended changes within the **Message** field.

In terms of the authorisation processes – how are authorisers informed they need to authorise an absence, time or expense claim or timesheets?

Authorisers will receive a task to approve the absence, claim or timesheet. These will appear in **My Tasks** and the user will receive an email or prompt within the system, depending on the settings which have been created.

Can employees add sickness themselves?

No, only Holiday, General Absence and TOIL can be added by employees. All other absence types, including sickness can only be added by **Super Users**/**Admin** users.

Will the person entering the absence on behalf of an employee receive a notification once the self certification form has been completed.

No, however they can check this within the absence itself and also view incomplete tasks.

What happens regarding increased leave based on service? Will that need to be adjusted manually? Therefore, customer would need to identify the individuals and make the change themselves?

For employees where this is built into their paid weeks (i.e. TT only or TT+ workers) the system will automatically apply an increase when they hit the appropriate length of service

Can you configure self-certification periods?

No, every absence instance will trigger a task.

What kind of Absence Management support is offered by EPM?

EPM will support you in configuring Absence Management Settings, as part of Implementation. We can also provide wraparound HR support that complements the module, helping you to maximise its value. This additional support is designed to assist you in strengthening your absence management processes and embedding effective practices across your organisation.

Support can include:

- Bi-Annual HR Insights Report
- Tailored recommendations and advice
- Tailored Strategic Support
- Access to Model Templates

If you are interested in purchasing additional support, please speak to your EPM Team.

Is the absence period adjustable?

Yes, this can be configured in **Absence Settings**. Absence data can also be viewed within the **Summary** and **Analytics** page within a timescale of your choice.

Will users receive authorisation requests?

Yes, these will appear as tasks within **My Tasks**. You can also determine which staff have approval access for specific types of absence, such as bereavement and maternity by clicking on the **Add Absence Approver** button in **Job Information**, within the relevant **Employee Record**.

Can Mat B1 forms and Mat Application Forms be sent by employees via the system.

No, a Mat B1 form will be given to the employee by the midwife and the Mat Application form sent by the school/Trust to the employee. The employee will complete these forms and these should be sent to your Payroll Team via our Client Communication Plaform. The information on the form should be entered into the system and HR Admin customers will receive a task with calculations and a copy of the schedule and letter via EPM Connect.

Case Management

Can previous case records be imported during Implementation?

No only active records will be imported by EPM.

Can you add your own cases to the system

The Core Case Management module provides view-only access to cases managed by EPM. However customers have the opportunity to upgrade to our Enhanced module, which provides editing access and the ability for school users to add cases themselves, including informal cases.

Time & Expenses

How are authorisers informed they need to authorise an absence, time or expense claim or timesheets?

Authorisers will receive a task to approve the absence, claim or timesheet. These will appear in **My Tasks** and the user will receive an email or prompt within the system, depending on the settings which have been created.

If you upgrade to the Enhanced Time & Expenses module, can timesheets, and time and expense claims also be added by school/Trust Users, in addition to employees?

No, the **Enhanced Time & Expenses** module only allows employees to add claims and timesheets.

Can the approver process include multiple approvers?

Yes, up to 5 approval levels can be added. This is managed within **Time & Expenses Settings**.

Can users limit the number of miles or value of an expense claim?

No, however the school can reject any claims which fall outside of their policies.

Payroll

When a maternity schedule has already been pulled from the system and the employee decides to change their maternity date, are we able to re-issue the maternity schedule with updated information?

The EPM Payroll Team will produce and provide an updated maternity schedule and payment details once they are notified of a change to start date.

Can the HMRC Starter Checklist be shared with the employee via My Portal and sent back via the system?

Although users are asked to tick the appropriate option within the Starter Checklist when adding a new employee, Payroll users will also need to send the original HMRC Starter Checklist form to their EPM Payroll Team via our **Client Communication Platform**.

When will payslips be available for employees to view in My Portal?

These are available at least 24 hours before the employee is paid.

Will employees receive an email notification when their payslip is ready for view?

No, however payslips can be viewed in **My Portal**, within the **Payslips & Statements** tab in **My Profile**.

Can I both check the reports in payroll and authorise?

We'd recommend that different people are responsible for checking and authorising the payroll.

SCR (Single Central Record)

How do I upload the information required for the SCR module if EPM do not hold this already?

This can be uploaded via the **Import SCR** function, during Implementation.

Can we assign training to governors (as they won't be on the system as employees)?

Yes, governors and other individuals can be added to the system as users. This will allow you to assign training and tasks and add them to the recruitment panels for vacancies. Permissions for these users can be locked down so that they are only able to view tasks that are assigned to them, without any further access within the system.

Can I add and remove daily agency/supply staff?

Yes, when adding agency staff both a **Start Date** and **End Date** are added. Once the **End Date** is reached, the individual will automatically be moved to **Previous Agency Staff**.

Can SCR be linked to EPM DBS

No, it is important that DBS checks have been checked manually by the school or Trust before confirming on the system that they have been checked, in order to support Safer Recruitment. EPM have therefore not opted to automate this area or integrate the two systems .

Can we add additional checks, not listed under the standard checks?

Yes, these can be added as **Other Checks** and will appear within the **Single Central Record** module (if purchased) and the **Pre-Employment Checks** within the **Employees** Module.

SWFC (School Workforce Census)

What are the benefits of the SWFC module?

The **SWFC** module pulls all of the relevant information from the **Employee** and **Absence Management** modules, into the SWFC report. This highlights any errors that will be returned by the DfE so these can be resolved before submitting directly to the DfE via the system.

How is the additional information required for SWFC (that EPM does not currently hold) uploaded into the system?

This can be added by the school directly into the employee module within the relevant section (for example, Qualifications); data such as **Occasional Teachers in school on census day** can be entered via **Produce Census** within the module.

How long will an employee have access to their payslips after leaving the school/Trust?

The employee will no longer be able to access payslips after leaving the school. We therefore recommend that payslips and statements are downloaded before the final day of employment. The school/Trust will continue to have access to the payslips for all previous employees.

Performance

Do I have to use the set Standards within the module or can I create my own?

As part of our Implementation process we will include commonly-used standards. Additional Standards can be added by the user. Some organisations also choose to include their Values within this section.

Where can I add the school or Trust's Values?

Values can be added within the **Standards** section of the **Performance** module.

How do I create a form for my review?

Within **Performance Settings** you can add review questions, these questions can be used to create a set template within **Custom Forms** to use for specific reviews and the applicable template selected when creating a review.

Can I run two cycles for my appraisals, for example Teachers in April and Support Staff in September?

Unfortunately the system will only allow for one cycle so Support and Teaching staff reviews will have to be aligned.

Can we upload our own review forms instead of creating these within the system?

Yes, although the system allows you to create multiple template forms for your reviews you can also upload your own review forms as a document when completing the review.

Training & CPD

Are we able to add our own categories when adding a new course?

Yes, you can add your own categories within **Training & CPD Settings**. As part of Implementation we will work with you to configure the relevant categories.

What does Global refer to within the 'Due' and 'Expiry' drop downs when adding a new course?

Training & CPD Settings allows you to create a pre-set custom timeframe for courses, which is defined as **Global**. This will save time in having to set individual timeframes each time you add a course. You can however choose to override this with an individual timeframe.

Will the system notify the employee once a course has been assigned?

Yes, the employee will be notified via the **Task Management** module once they have been assigned a course. This will be displayed as a task in **My Tasks** and also as a task within the **To Do** tab in **My Performance**.

How can I tell if the course has been completed by employees?

The course will show as **Completed** within the employees training record. It will also show within the **Completed Training** tab within **Training Instances** and within the specific course when viewed within the **Course Library**.

Can I bundle courses together rather than sending each one manually?

Yes, the module defines these as **Collections**. Collections allow you to bundle courses together into a collection of courses to be used and sent to new starters, or other groups of employees.

Will you provide courses within this module?

No, as our customers use a wide variety of providers, the module allows you to add courses from any provider.

What is credit allocation and how do I use this?

Credit allocation is currently not in use.

Does the Training module integrate with other modules, such as Performance?

No, this does not currently integrate with other modules within the system.

Can objectives be assigned to the employees by the person undertaking the review?

Yes, and these can also be linked to overall **Property Objectives** (whole school/trust objectives).

Can employees log their own training?

Yes, they can add this via **+ Log Training** within **My Training**.

Can employees request training?

Yes, they can add this via **+ Log Training** within **My Training** and simply leave it as incomplete; this can then be approved and will appear within their **To Do** training.

Recruitment

Can the Recruitment module integrate with job boards?

All adverts created will be posted within the **EPM Connect Candidate Portal**, in addition to the DfE website. To ensure that candidate applications from other job boards are pulled through into the **Recruitment** module, simply copy the link provided once an advert has been created within the module and copy this into the **How to apply** section of any job board advert. All application information will then be pulled through directly into the system. The application information of the successful candidate can then be transferred into the **Employees** module, by clicking the **Convert to Employee** button.

Can you configure the Recruitment module? For example, can you set NI number as mandatory?

You cannot make existing non-mandatory fields mandatory. However, in the Questions section you can create additional custom mandatory questions.

Can permissions be set up so that individuals (eg Head of History) can only view specific (History) roles in Recruitment?

Yes, however they would need to be added to the **Recruitment Panel** for each of the vacancies they wish to view.

Will the Recruitment Panel view an anonymised view of the data?

Yes, this is managed in the overall system permissions. There are two permissions for the **Recruitment Panel**:

- **Edit vacancy (Recruitment Panel Sensitive)** - this provides access to an anonymised version of the candidates and their applications (ID number rather than Name), EDI (Equality, Diversity and Inclusion) data, DOB (Date of Birth) etc
- **Edit vacancy (Recruitment Panel)** - this provides access to the full version of the candidate information and their applications

System

How often is the system backed up?

Connect is backed up every 5 mins with a 15 minute RTO / RPO.