Getting Started – A Guide to EPM Connect

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 13th April 2026 and is issued on a version-controlled basis under her signature.

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Contents

EPM Connect Go Live: Getting Started

This guide is designed to support you following Go Live, by helping you prioritise the most important actions at the right time.

During Month 1, our primary focus will be working closely with you to ensure that Payroll is accurate and fully validated. Alongside this, your HR and administrative users will have time to review and configure key system settings in line with your Trust or school policies. To maintain focus and reduce risk during this critical period, employee self-service and any additional modules you have purchased will not be enabled in Month 1. Access to these modules will be provided in Month 2.

Step 1: Portal access and managing permissions

Following successful migration and initial checks, we will provide you with access to EPM Connect. Login details will be sent via **connect@epm.co.uk**, so please look out for these.

As soon as you are granted access, we recommend logging in and configuring permissions for your users. This is managed within **User Administration** within the **Admin** module.

A step -by-step guide can be found here: **Adding Users and Permissions Guide**.

Step 2: Review Data

Once permissions have been updated, we recommend reviewing the data that has been added to the system by EPM. This will help you familiarise yourself with the information available and confirm that everything is accurate before your first payroll run.

Employee data can be downloaded using the **Import Employees** function to check the data is correct. Please see the **Import Employees EPM Connect Guide** for full instructions.

Step 3: Turn off Notification Emails

Important

During Month 1, our primary focus will be working closely with you to ensure that Payroll is accurate and fully validated. Alongside this, your HR and administrative users will have time to review and configure key system settings in line with your Trust or school policies. To maintain focus and reduce risk during this critical period, employee self-service and any additional modules you have purchased will not be enabled in Month 1. Access to these modules will be provided in Month 2.

As a result, you may wish to switch off employee notifications until access has been provided to employees. Follow the steps below.

1. On the left-hand side of the EPM Connect window, select **Admin**. A list of further options is displayed.
2. Select **Notification Settings**. The **Notification Settings** page is displayed.

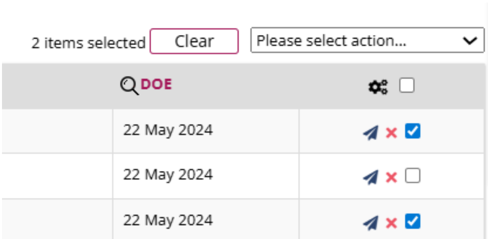
3. Select the **System Emails** tab.
4. Move the **Force review for system emails** toggle to **YES**.

   This will allow you to see what emails are about to be sent via the system.

   All emails relating to tasks in the system will appear within this section. If you wish to send any of the tasks to users already using the system, scroll down to **Emails** for review.

   To send an email notification relating to a task, click the arrow button on the far right of the notification.

   Alternatively tick the box next to all relevant notifications and select **Send selected emails** from the **Please select action** drop-down menu



To delete an email click the red cross on the far right hand side of the notification.

Step 4: Add Contract Changes, Absences, Time and Expense Claims

In preparation of your first payroll, we recommend starting to enter contract changes as early as possible. This includes:

- Starters
- Leavers
- Contract changes

Important

All contract changes, absences and time & expense claims should be added by your payroll cut off date.

As the system is new, this may take a little longer than usual at first. However, the following resources are available to support you in quickly familiarising yourself with the processes:

- **Show Me How To Guides** (these can be found on the left hand side of the system)
- **Videos, Written Guides and FAQs** (these can be found here: EPM Connect Guides)
- **Live EPM Connect Training** (we recommend attending these bi-weekly sessions ahead of Go Live)

Step 5: Import additional data

EPM will migrate all relevant data held within our current system. However, once all contract changes, absences and time and expense claims have been added, you can finalise Line Manager details ready for import.

Check and update User Emails

The **User Email** field is generally updated during Implementation, however once access to the system has been granted, it is important to check that all users have a relevant work email address within the **User Email** field within **Personal information**. For any users that have been sent to the EPM Implementation Team without an email address, the **User Email** field will display a default email address, for example pleasechange@C009364.com.

To check for default email addresses follow the **Update User Email Guide**.

Line Manager Details

Line Manager details are required for approvals within enhanced modules such **Absence** and **Time and Expenses**, whilst also being used for permissions and reporting. If access is limited to a small number of users during the first month, the import of Line Manager details can be managed in Month 2.

Line Manager details can be updated within the relevant **Employee Record** or imported en masse, via the **Import Employees** spreadsheet. A full guide can be found here: **Import Employees Guide**.

Line Manager details that need to be updated can be easily identified by the system default please change email. For example, **pleasechangeC009364.com**.

Step 6: Payroll Checks and Authorisation

Once all contract changes, absences and time expense claims have been added, you should begin the monthly Payroll Process.

Important

For current customers, your Payroll deadlines will remain the same as before migration, please ensure that these are shared with all relevant personnel within your organisation. From the date you go live you will need to add any changes via EPM Connect. Ensure that your team are aware that any changes added to the previous EPM Portal will not be processed.

The following should be added via EPM Connect from the date of Go Live:

- **Contractual changes (**These are managed within the individual **Employee Record**)
- **Time and Expense Claims and Timesheets** (These are managed within **Time & Expenses**)
- **Absences** (These are managed within **Absence Management**)

You may find it useful to use the **Show Me How To** guides, or **Payroll Module Guide** the first time you complete these tasks.

The Payroll process includes the following steps:

1. **Check Errors:** Review and correct any missing or incorrect information that may impact payroll. These can be checked throughout the month, however must also be checked as part of the final monthly process.
2. **Check Warning:** Review system warnings and notifications and take action where required. These can be checked throughout the month, however must also be checked as part of the final monthly process.
3. **Submit for Processing:** Confirm payroll is ready for the Payroll & Pensions team to process.
4. **Check Reports:** Review payroll reports and raise any queries via the Client Communication Platform.
5. **Authorise Payroll:** Approve payroll ready for payment.

A full guide can be found here: **Payroll Module Guide**.

As the system will be less familiar, it is expected that both parties will want to check the data more thoroughly. As a result, we expect a greater number of queries and we actively encourage you to get in touch with us at any time with any questions. It is also not unusual for authorisation to be delayed by a day or two as we complete final checks, allowing both you and your EPM team to ensure payroll is accurate. Our priority is ensuring that your team are paid correctly and that payroll runs smoothly.

Payslips

For current customers, following Go Live, employees will view new payslips in EPM Connect, via My Portal. Please note that access to the previous epayslips portal and therefore access to historic payslips will be removed three months after Go Live or on 31st March, whichever is earliest. We therefore recommend asking employees to download previous payslips as soon as possible.

Step 7: Configure Absence and Time & Expense Settings

Customers who have opted for **Enhanced Absence Management** and **Time & Expenses** should configure settings for these modules before providing logins to employees and enabling self-service.

Each module has its own dedicated guidance, available here: **EPM Connect Guides**. Select your service type and module to access all relevant resources.

Step 8: Send Login Email to Employees

Once the first payroll has been processed and authorised, we recommend sending an email to employees with details of how to login for the first time, along with a guide to **My Portal**, which provides an overview of self-service functionality. This will also allow them to access payslips following your pay date.

You may also wish to create a task asking employees to review their **Contact Details** and **Next of Kin** information within the **My Profile** section of **My Portal**. This will confirm employee data is accurate, whilst encouraging employees to login and become familiar with tasks and self-service. It also allows you to track the users who have logged in.

Example email

Dear XXX,

As you may be aware, our EPM HR and Payroll system has recently been upgraded. To login to the system, please follow the instructions below.

My Portal

A key benefit of the new system is employee self-service. ***My Portal*** *provides employees with access to their profile and depending on the modules chosen by the school, access to self-service functionality across a number of areas.*

This includes the ability to update ***Contact Details***, ***Next of Kin*** *and* ***Bank Details****. Please see the attached My Portal Guides for more information.*

The first time you access the platform, you will need to create a new password.

1. *Enter https://www.epmportal.uk/ into the search bar of your preferred browser.*
2. *In the* ***Login*** *field, enter your work email address and click* ***Forgotten password****. An email will be sent to your inbox.*
3. *Open the email and click* ***Please click on this link to reset your password****. A webpage will open.*
4. *Enter your email address, followed by a password.*

   Your new password should be:

   - *10 characters long*
   - *include a combination of upper and lower case letters*
   - *include at least one special character*
   - *include one number.*
5. *Re-enter your password and click* ***Reset****.*

Your password has been reset. Please return to the website and enter your ***Login*** *and* ***Password****.*

Step 9: Work Patterns, Documents, Profile Pictures and Data

A key benefit of EPM Connect is the addition of **Work Patterns** (shift patterns), these provide more accurate absence reporting, calculating absences by working time lost, rather than calendar days.

Payroll can be processed without Work Patterns, so this is not required prior to Month 2. Work Patterns should be added via the **Work Patterns Spreadsheet** and sent to the Migration Team for upload.

A step-by-step guide can be found here: **Guide to Completing Work Patterns (Shift Patterns)**.

You may also wish to upload the following directly to the system.

- Employee documents and policies
- Profile pictures

Important

Please remember to continue to prioritise Payroll, ensuring that all contract changes, absences and time and expense claims are added for the following month.

Step 10: Configure Settings within Additional Modules

The initial focus on payroll ensures that pay-critical tasks are prioritised and reduces the risk of over- or under-payments.

Once payroll has been completed, you will be given access to any additional modules you have purchased. We recommend starting by reviewing and configuring module Settings in line with your existing policies and operational processes.

Once **Settings** have been updated, take some time to familiarise yourself with each module. Our **Show Me How To Guides** along with other training resources are designed to support you at every step and help you get the most value from each module.

All written and video training guides can be found here: **EPM Connect Guides**.

Simply select your service type and module to access all relevant resources.

Queries and support

We understand that moving to a new system will naturally raise questions along the way. Please don't hesitate to get in touch with us at any time if you have any queries Our team is here to support you throughout the process and will be happy to help with anything you need.

Data queries

Please use the **Client Communication Platform** for communication to EPM and to send all documents securely over to us. Please use the **Implementation** and **Migrations** categories as we will be supporting you through the transition and up to the completion of your first month with EPM.

Migration queries

If you have any questions during the migration process, please contact us via the Migration channel within our **Client Communication Platform**. This ensures that queries are directed to the appropriate team and enables us to respond quickly. It also allows us to identify common queries and use this insight to make continuous improvements to the migration process. If it would be helpful to talk things through, we're more than happy to arrange a quick Teams call to go through your query in a bit more detail.

Payroll and HR queries

For all Payroll and HR related queries, both during an post migration, please continue to direct these queries to your current Payroll and HR Teams via our **Client Communication Platform**.

Training Resources

We recognise that adopting a new system can be daunting for some users, and that users will have varying levels of experience with HRIS systems. Whether your team members are seasoned HRIS users or have never encountered an HR system before, we're committed to making the transition as seamless and hassle-free as possible.

Show Me How To Interactive Guides

Although video guides, tutorials and face to face demos can be valuable, they rely on the user absorbing and retaining all the information, which is not an easy task. That's why EPM has invested in a Digital Adoption Platform or DAP technology, which seamlessly integrates with EPM Connect and offers **Show Me How To** guides that walk you through each task, step-by-step as you undertake it. These guides act almost like a sat nav, offering online prompts such as 'click here' and 'complete the fields below', in addition to advice and tips.

The interactive guides can be accessed via the **Show Me How To** button on the right hand side of the EPM Connect screen at any time and as many times as you need them, providing the support you need, when you need it.

Written and Video Guides and FAQs

In addition, we provide written and video guides and FAQs within our EPM Connect Guides section of our website. This variety of resources allow each user to access the guides that best suit their individual needs.

Live Training Sessions

In addition, you will be sent a link next month to book a place on our free live training sessions **here**. These sessions will take place via Microsoft Teams every fortnight, and will be recorded for your convenience, so that you can access them at any time.

Support

We are confident you will love our new system but appreciate that moving to a new system can feel daunting. Should you have any questions at any stage, please do not hesitate to contact our team, who will be happy to support you.

Your EPM Migration Team

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