# Guide to HR Documents – Contracts and Letters in EPM Connect

## EPM Connect Guide

# Document Control

**Document Overview:** This document provides an overview of Letters and Contracts available within EPM Connect. These documents are available for HR Admin customers only.

**Classification:** Public

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**Last Reviewed by:** Keren Prior, Director of Operational Excellence

**Date of Next Review:** 10th August 2027

**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 10th August 2026 and is issued on a version-controlled basis under her signature.

**Document History**

| | |
|---|---|
| **Date of Change** | 10/08/2026 |
| **Summary of Change** | Additional clarification provided regarding Letterheads |
| **New Version Number** | 1.2 |
| **Changes to be notified to** | Keren Prior, Director of Operational Excellence |

# Guide to HR Documents in EPM Connect

We understand that documentation relating to new starters, resignations and contract changes is often required quickly. We also recognise that these situations, particularly resignations and contractual changes, can be sensitive, and that you know your staff and the context of each situation best.

To better support you, EPM has streamlined and simplified the document management process within EPM Connect. This enhancement enables faster turnaround times, reducing our HR Administration SLA from 10 days to 5 days, with the potential for further improvements. At the same time, it provides greater flexibility and control, allowing you to personally tailor documentation to your specific needs.

For HR Essentials and HR Partner customers, EPM Connect now offers two flexible approaches. Once a new starter, resignation or contract change is recorded, you can initiate a workflow which automatically triggers the relevant HR processes. Our experienced team will carry out key checks, such as prohibition checks for new starters, review system changes, and identify any potential issues before generating the appropriate documentation.

Documents are then shared with your Document Review Team, giving you the opportunity to complete final checks and apply any additional personalisation before approval.

For urgent changes, you also have the option to generate documents instantly using compliant EPM templates. While this route bypasses the individual compliance checks carried out by the EPM team, it enables immediate document production where speed is critical.

Once approved, you can manage the signatory process directly within the system by sending documents to the appropriate administrators and leaders for approval, before issuing them to employees or candidates for final signature.

Once signed, all documents are securely stored against the employee record, where they remain easily accessible for future reference and download.

Changes to Documents

To streamline the process and reduce the time taken to produce documentation, we have simplified the structure of our letters by introducing a single template for each key letter. This reduces the potential for errors or confusion, while allowing you to use your detailed knowledge of your staff and individual circumstances to tailor letters as appropriate after the team have uploaded the checked version.

This approach applies to the following:

- Contractual Change Letters
- Extend Appointment Letter
- Non-Renewal Letter
- Resignation Letter
- Sickness/Maternity Cover/Named Child Letter

We have simplified the structure of our contracts by reducing the number of contract types to two, one for teaching roles and another for non-teaching roles. Additional information can be added to the final document by the customer as required after the checked document has been uploaded by the EPM Team.

We have simplified formatting by replacing traditional letterheads with a logo. This significantly reduces the time required to produce documentation, enabling you to receive documents more quickly. If further personalisation is required, customers have the opportunity to save documents on headed paper where needed before issuing.

These changes also enable our teams to focus more time on reviewing changes and responding to customer queries, providing the support you need, when you need it.

# Data Fields

**Important**

Fields shown in **teal** within the examples, indicate fields that are pulled directly from the **Employee Record** in EPM Connect, or consistent fields such as signatory that have been agreed previously with your EPM Admin Team.

Field in **purple** within the examples, indicate fields that should be entered/edited by the school.

Notes in pink provide explanations as part of this guide and will not appear within the documents.

## School Logo

The logo of the relevant property (school) will be added to the letters directly from EPM Connect. The logo added will be the logo our HR Admin Team hold on file. Please send the relevant logo to your team.

## Incomplete information

Dates such as **00/00/0000** or **NOT SET** indicate incomplete fields within EPM Connect.

A dash (**-**) or **N/A** indicate that a dash or N/A have been entered within the relevant field.

# Contracts

## Teacher Contract

**Date**

**Private and Confidential**

**Title First Name Surname**

**Address Line 1**

**Address Line 2**
**Address Line 3**

**Postcode**

**Dear First Name**

I have pleasure in confirming your appointment, on behalf of the **Governing Body/Trustees/Board** of **Example School** ('the Employer'), **Address Line 1, Address Line 2, Address Line 3, Postcode**, as a member of the teaching staff.

**This letter is your contract of employment and contains a statement of the applicable terms of employment given in accordance with the requirements of the Employment Rights Act 1996 and the relevant provisions of the Academies Act 2010.**

**1** This only applies to academies.

**Name of Employee** **First Name Surname ('you')('your')** of **Address Line 1, Address Line 2, Address Line 3, Postcode.**

**Job Title** **Teacher,** a job description will be provided.

**Date of Appointment** **Start Date**

**Type of Appointment**

This is a **Permanent/Temporary/Fixed Term** appointment. This appointment is subject to the induction arrangements and termination clauses detailed.

**2** Additional content will be displayed for non-permanent appointments.

**Place(s) of Work** Your principal place of work will be **Example School, Address Line 1, Address Line 2, Address Line 3, Postcode**. **3** Additional places of work can be added, along with wording which relates to the right for the employee to be asked to work at other sites within the Trust.

**FTE Value** **FTE Value**

**Hours of Work**

Under the STPCD, directed time is the time a school/trust can direct when a teacher is at work or available to work up to a maximum of 1265 hours over 195 days in any one academic year. This is pro-rated for part time staff. Your start and finish times will vary, your core hours of work will predominantly be undertaken between Monday to Friday, 8:00am to 5:00pm and in accordance with your directed time budget. Work will occasionally be required outside of these core hours to ensure all contractual duties are fulfilled including but not limited to parent consultation meetings,

staff meetings and training. You will receive advance notification of when directed time hours are required to be worked outside of the core hours at the beginning of the academic year, when the directed time budget is published. Additional hours outside of this will be self-directed hours.

Your normal working pattern is as follows:

Shift Pattern:

**Monday, Tuesday, Wednesday, Thursday, Friday: 08:00 - 16:00**

**4** This is formation is sourced directly from **Work Patterns** in **Job Information** in the **Employee Record.**

**Date of Continuous Service**

(a) **Continuous Service Start Date**

(b) **Continuous Service Start Date within Organisation** (subject to verification)

a) This is the date on which your statutory employment rights, such as unfair dismissal (but excluding redundancy payment purposes) are based.

b) This is your local government continuous service date and is used for those contractual purposes defined in the conditions of service. Your entitlement to redundancy payment in this post will be based on the Date of Appointment of this contract. Previous continuous service, but not concurrent service, may also be considered if it was work carried out with an employer listed within the Redundancy Payments (Continuity of Employment in Local Government, etc.) (Modification) Order 1999, as amended from time to time.

**Salary**

Your salary on appointment will be **Salary** per annum on point **Pay Scale**. Further details of the pay structure operated is provided in the Employer's Pay Policy, available from the Office.

A statement of your current salary assessment will follow.

Your salary will be paid monthly by bank credit. Please complete and return the Bank Credit Form as soon as possible. Every effort will be made to make accurate salary and other payments to you on the due date. Should an overpayment occur or should you owe monies to your employer in connection with your employment, you will be advised of the amount involved and consulted about your preferred method of repayment. If agreement is not reached the employer shall be entitled to deduct from your salary or other payments due to you any money which you may owe to the employer at any time.

It is your responsibility to ensure the appropriate deductions are taken in relation to pensions. Please check your payslip carefully to ensure pension has been deducted if appropriate and if not notify the Office immediately.

If form SSP1L was issued by your former employer this should be given to the Office on your first day of work.

**Additional Staff Benefits**

Please contact your Setting for a Benefits Statement.

**Training**

All staff are required to regularly undertake training and updates that are relevant to their role including Safeguarding, Data Protection and Whistleblowing training. Specific additional training includes 5. Information within the Training Requirements field will appear here. If it appears blank it is due to no data within the field.

Any further training requirements will be identified during your induction period.

**Holiday Entitlement**

For written information about your terms of employment relating to holidays and holiday pay you should refer to the following documents:

i) Conditions of service as set out in the Conditions of Service for School Teachers for England and Wales (The Burgundy Book) as amended from time to time.

ii) Conditions of service agreed locally between the Employer and the recognised unions, as adopted by the Employer.

**Sick Leave**

Subject to the provisions of the Conditions of Service for School Teachers for England and Wales (The Burgundy Book), as amended from time to time, a teacher absent from duty owing to their illness (which term is deemed to include injury or other disability) shall be entitled to receive in any period of one year sick pay in accordance with the following scale.

- During the first year of service: full pay for 25 working days and, after completing four calendar months service, half pay for 50 working days.
- During the second year of service: full pay for 50 working days, and half pay for 50 working days.
- During the third year of service: full pay for 75 working days and half pay for 75 working days.
- During the fourth and successive years: full pay for 100 working days and half pay for 100 working days.

**Sick Pay**

Sick Pay shall include, where appropriate, Statutory Sick Pay, and shall not exceed full (ordinary) pay.

'Working days' refers to the 195 days on which a teacher is required to work in accordance with the School Teachers' Pay and Conditions Document.

For further written information about your terms of employment relating to sickness or injury, or sick pay you should refer to:

i) The Sickness Absence Policy which is available from the Office.

ii) Current conditions of service as set out in the Conditions of Service for School Teachers for England and Wales (The Burgundy Book).

iii) Conditions of service agreed locally between the Employer and recognised unions.

**Notice of Termination**

Unless stated elsewhere in this letter of appointment, notice of termination for both the employee and employer is in accordance with the paragraphs below.

The Employer reserves the right to make a payment in lieu of notice (PILON) for all or any part of your notice period on termination of your employment. This provision, which is at the Employer's discretion, applies irrespective of whether notice to terminate the contract is given by the Employee or by the Employer.

You will be compensated by being given a payment in lieu of the notice, amounting to the payment that you would have received if you had worked your full notice period. The termination of your employment will be effective from the termination date, regardless of when the PILON payment is made.

**Termination of Contract by Employee**

Should you wish to resign from your employment you should submit a letter giving notice of the effective date of resignation to the Headteacher.

The dates by which you are required to submit your resignation in each of the 3 terms are:
**6** Dependent on information provided to EPM Team.

**Autumn Term**

**31 October for 31 December**

**Spring Term**

**28 February for 30 April**

**Summer Term**

**31 May for 31 August**

**School terms are defined by Conditions of Service for School Teachers in England and Wales (The Burgundy Book) for the payment of salary as follows:**

**Autumn Term**

**1 September to 31 December**

**Spring Term**

**1 January to 30 April***

***or the day before commencement of a new teaching appointment, whichever is the earlier, providing you are available for duty up to that date**

**Summer Term**

**1 May to 31 August**

**Termination of Contract by Employer**

The end of term dates and the periods of notice of termination to be given by the Employer are the same as those dates and periods of notice with which the Employee must comply when terminating the contract by resignation.

Where an Employee has been continuously employed for more than eight years, they shall be entitled to receive statutory notice, as specified in Employment Rights Act 1996, to run concurrently with contractual notice, entitling them to one week's notice for each year of employment up to a maximum of twelve weeks.

The only exception to the above period of notice is if you are summarily dismissed for gross misconduct.

**Pre-Employment Checks**

This contract is subject to the following checks, unless exceptionally you are exempt any of the checks, in accordance with the relevant paragraphs below:

- Two employment references satisfactory to the Employer
- Medical clearance
- Enhanced Disclosure and Barring Service (DBS) clearance satisfactory to the Employer
- Satisfactory completion of a Staff Disqualification Declaration
- Confirmation of qualifications
- Verification of Identity and of the Right to Work in the UK

- Proof of NI Number
- Qualified Teacher Status (QTS) and successful completion of a statutory induction period
- Confirmation that you are not subject to either a Prohibition Order or Interim Prohibition Order

**References**

The appointment is subject to two satisfactory references; one of which must be from your most recent employment working with children. At the discretion of the Employer, other suitable referees may be acceptable if this requirement cannot be fulfilled.

**Medical Fitness**

The appointment is subject to satisfactory evidence of medical fitness. You should already have completed a medical questionnaire prior to your appointment. If you have not yet completed a questionnaire please inform your Employer (this requirement may be waived where medical fitness for employment with the Employer has recently been established).

A copy of the Employer's procedure on the notification of absence for staff and notes on the submission of medical certification is available from the Office.

**Disclosure and Barring Service (DBS) Clearance**

In accordance with the requirements of the Home Office this appointment is subject to an enhanced check for regulated activity by the DBS.

Your post is exempt under the Exceptions Orders to the Rehabilitation of Offenders Act 1974. **You are required to disclose details of all adult cautions (simple or conditional), convictions, bindover orders and warnings even if they are spent, except for those listed as protected cautions and convictions. Please refer to the DBS website, www.gov.uk/government/publications/new-guidance-on-the-rehabilitation-of-offenders-act-1974, for more information. If you have failed to make any relevant disclosure or have included false or misleading information therein, you will be liable to dismissal.**

If during the course of your employment you are arrested, or summonsed for an offence or receive a conviction, a bindover order or a warning given by a police force you are required to inform your Employer of this fact immediately. Such information will be treated in confidence, so far as this is consistent with the safety of children and compliance with statutory child protection procedures. **Failure to disclose such information may result in disciplinary action which could lead to the termination of your employment.**

**Disqualification**

In accordance with the provisions of The Childcare Act 2006 and The Childcare (Disqualification) Regulations 2009 and Childcare (Early Years Provision Free of Charge) (Extended Entitlement) (Amendment) Regulations 2018, there is a requirement on some staff in educational settings to disclose relevant information.

This requirement will apply to your employment if you work in an Early Years setting with children (from birth until 1 September following a child's fifth birthday) or Later Years childcare (children above reception age but who have not attained the age of 8) in nursery, primary or secondary school settings, or if you are directly concerned with the management of such childcare. **Failure to disclose such information may result in disciplinary action which could lead to the termination of your employment.**

**Induction** [7] This section can be removed if not applicable.

For Early Career Teachers (ECTs) this appointment is subject to satisfactory completion of an induction period, or evidence of completion, of not less than full time equivalent (FTE) of two full school years (or equivalent) except where special circumstances apply under the Induction Regulations.

Failure to satisfactorily complete your induction period will lead to the termination of your employment subject to extension and/or appeal procedures. The notice required to dismiss a teacher who fails to complete their induction period will be one week for each complete year of employment.

**Prohibition Check**

In accordance with the requirements of The School Staffing (England) (Amendment) Regulations 2013, this appointment is subject to a check with the Department for Education to ensure that you are not subject to a prohibition order or an interim prohibition order. If this check shows that you are prohibited from this employment the offer of employment will be withdrawn.

**Right to Work in the UK**

You are required to provide to the Employer relevant documentation to warrant that you are entitled to work in the UK (in accordance with the Immigration, Asylum and Nationality Act 2006). You are required to show the Employer your current passport, which will be copied and returned to you. If you do not hold a British passport, you are required to prove you have been granted settled status under the EU Settlement Scheme, further information can be found at www.gov.uk/settled-status-eu-citizens-families. You must contact the Office to find out which documents you will need to provide.

You warrant that you are entitled to work in the UK without any additional approvals and will notify the Employer immediately if you cease to be so entitled at any time during your employment with the Employer.

If you require immigration permission to work in the UK and the Employer acts as a sponsor, you must:

a) On request, provide the Employer with such documentary evidence as it requires from time to time, to prove that you have immigration permission to work for the Employer in the role set out in this contract and in order for it to check your visa status.

b) Notify the Employer immediately of any change to your immigration status.

c) Keep the Employer notified of any changes to your home address and telephone number (including mobile number, if you have one). For these purposes, you should be aware that the Employer needs to maintain a history of your contact details, not just your current details.

d) Notify the Employer of any change in circumstances which may affect your right to work for the Employer or to live in the UK.

**Income Tax and National Insurance**

You should forward your Income Tax form P45 as soon as you take up your employment. If you do not have a form P45, you must complete a Starter Checklist.

## Probationary Service

**8** If probation is marked as passed this paragraph will not appear. If this box is not ticked this information defaults to 6 months unless otherwise recorded in **Probation** section of **Employee Record**.

Unless you are a Newly Qualified/Early Career Teacher and subject to separate induction arrangements, the first **six months** of the Employee's employment shall be a probationary period

and the employment may be terminated by either party at any time during this period with notice of one month.

The Employee's performance during the probationary period will be monitored. If the Employee's performance during the probationary period is not satisfactory, the Employee will be notified of this and of the standard of performance required from the Employee to successfully complete the probationary period. The Employee will be met prior to the end of the probationary period to confirm whether or not the Employee has successfully completed the probationary period.

**Residential Posts** [9] This section is only relevant for residential posts.

**It is a requirement of your contract, as an Employee residing on the school site, to comply with the Residential Schools regulations. All persons living in the allocated accommodation on the school site over the age of 16, are required to complete a 'Standard' DBS check in accordance with the Department for Education document for Residential Special Schools, National Minimum Standards. In accordance with paragraph 14.3, if there is evidence that you or a person residing in your allocated accommodation is found to be unsuitable to have regular contract with children; accommodation may cease to be provided under this contract of employment.**

**Religious Instruction** [10] This section is only relevant for Church of England, Catholic and Islamic schools.

Religious instruction.

**Collective Agreements**

For written information about your terms of employment, you should refer to the following documents:

i) The School Teachers' Pay and Conditions Document (unless where inconsistent with the terms of this contract, in which case the terms of this contract prevail), and the Pay Policy which is available from the Office.

ii) Conditions of service agreed nationally with the teachers unions recognised for negotiating purposes (unless where inconsistent with the terms of this contract, in which case the terms of this contract prevail), as adopted by the School (The Burgundy Book).

iii) Conditions of service agreed between the Local Authority and the recognised unions referred to above where adopted by the Employer.

**Policies and Procedures**

Copies of policies and procedures including Equal Opportunities policy, Health and Safety policy, Trade Union policy, Flexible Working and Leave policies are available from the Office.

These policies and procedures do not form part of your contract of employment.

**Disciplinary Rules and Procedures**

Disciplinary matters are managed in accordance with the Disciplinary Rules and Procedures.

If you wish to appeal against a disciplinary decision you may apply in writing in accordance with the Disciplinary Procedure.

The Employer reserves the right to suspend you for the purposes of investigating any allegation of misconduct or neglect against you.

This procedure does not form part of your contract of employment.

**Grievance Procedure**

If you have a grievance about your employment you should first raise it with your line manager either orally or in writing. If the matter is not resolved you are entitled to pursue it formally through the Grievance Procedure.

This procedure does not form part of your contract of employment.

**Pension Scheme**

All teachers between the ages of 16 and 74 inclusive, with the exception of those in receipt of an ill health pension awarded prior to 1 April 1997, will automatically be members of the Teachers' Pension Scheme although you have the right to opt out of the scheme.

Further information regarding the scheme can be downloaded from the scheme administrator's website www.teacherspensions.co.uk, please refer to the member guides section for details. If you wish to opt out of the scheme in respect to this employment the relevant form for completion is also available on this website and should be completed online and submitted to the TPS electronically.

An opt out form is not valid if completed prior to this employment commencing, but must be completed within three months of this employment commencing in order for you to qualify for a refund of contributions taken.

If you have previously paid AVC contributions through your salary it is your responsibility to ensure that your AVC provider and payroll provider are made aware of the change in your employment circumstances. Please also ensure the Setting and TPS are aware of your circumstances and check your payslip carefully.

Further details about the scheme, including the age at which you may access your pension, whether this is in full or actuarially reduced, is available in the scheme guide, available from the scheme administrator.

**Regular Re-Enrolment**

If you decide at any time to opt out of membership of the TPS you will automatically be re-enrolled into the scheme on the 're-enrolment date' if, on that date, you are aged at least 22, under State Pension Age and earning more than the monthly earnings figure specified by the regulations, unless you had opted out within 12 months prior to the 're-enrolment date'.

Re-enrolment will take place on the third year anniversary of the Auto-enrolment implementation date and you will be notified in writing prior to this date explaining the implications of the re-enrolment requirements.

**Confidential Information**

For the purposes of this clause 'Confidential Information' includes information in whatever form relating to the Employer, students (past and present), agents, officers, employees, members of the Governing Body/Trustees/Board, such information to include (but not limited to) details relating to finances, results, schemes of work, personal information, whether or not such information is marked confidential. The Employee shall not (except in the proper course of their duties, as authorised by the Employer, either during or after the appointment or at any time after the termination of the employment, (howsoever arising)):

a) use any Confidential Information

b) make or use any copies

c) disclose any Confidential Information to any person, Company or other organisation whatsoever.

All Confidential Information and copies shall be the property of the Employer and on termination of the appointment or at the request of the Employer, at any time during the appointment the Employee shall hand over all Confidential Information or copies.

Nothing shall prevent the Employee from disclosing information which they are entitled to disclose under the Public Interest Disclosure Act 1998, provided the disclosure is made in accordance with the provisions of that Act.

**Employer Property**

All documents, manuals, hardware and software provided for your use by the Employer, and any data or documents (including copies) produced, maintained or stored on the Employer's computer systems or other electronic equipment (including mobile phones), remain the property of the Employer.

Any property of the Employer in your possession and any original or copy documents obtained by you in the course of your employment shall be returned to your line manager at any time on request and in any event prior to the termination of your employment with the Employer.

**Outside Interests**

During this employment, you shall not, without the prior written authority of the Employer, whether paid or unpaid, be directly or indirectly engaged, concerned or have any financial interest as an agent, consultant, director, employer, owner, partner, shareholder or other capacity in any other business, trade, profession or occupation (or the setting up of any business, trade, profession or occupation).

**UK General Data Protection Regulation (UK GDPR)**

The Employer collects and processes personal data relating to its employees to meet its obligations under the employment contract and to comply with its legal obligations. The Employer takes the security of your data seriously. The Employer is committed to being transparent about how it collects and uses that data and to meeting its data protection obligations.

Where the Employer processes special categories of personal data, such as information about ethnic origin, sexual orientation, health or religion or belief, this is done for the purposes of equal opportunities monitoring. Data that the Employer uses for these purposes is only collected with the express consent of employees, which can be withdrawn at any time.

The Employer has policies and controls in place to try to ensure that your data is not lost, accidentally destroyed, misused or disclosed, and is not accessed except by its colleagues in the performance of their duties. You have some obligations under your employment contract to provide the organisation with data. You may also have to provide the organisation with data in order to exercise your statutory rights, such as in relation to statutory leave entitlements. Failing to provide the data may mean that you are unable to exercise your statutory rights.

The Employer takes its responsibilities under data protection seriously and all policies are available from the Office which you are required to read and understand.

**Entire Agreement**

This agreement together with any documents referred to within it sets out the entire agreement and understanding between the parties and supersedes all prior agreements, understandings or arrangements (oral or written) in respect of the employment or engagement of the Employee by

the Employer. No purported variation of this agreement shall be effective unless it is in writing and signed by or on behalf of each of the parties.

**Third Parties**

Unless expressly provided in this agreement, no term of this agreement is enforceable pursuant to the Contracts (Rights of Third Parties) Act 1999 by any person who is not a party to it.

**Governing Law and Jurisdiction**

This agreement shall be governed by and construed in accordance with English law.

Each of the parties irrevocably submits for all purposes in connection with this agreement to the exclusive jurisdiction of the English courts.

**Changes to Written Particulars**

The Employer reserves the right to make reasonable changes to any of your terms and conditions of employment. You will be notified in writing of any changes as soon as possible and in any event within one month of the change.

**Acceptance of the Appointment**

This contract is subject to satisfactory references, medical clearance and a Disclosure and Barring Service clearance and shall not take effect in the event of any adverse response being received or discovered from any enquiry or examination made or specified at the time of appointment, in order to safeguard the well-being of the pupils, or as a result of a condition specified by the Employer at that time.

On acceptance of this appointment, this document will form the principal statement of employment particulars in accordance with the requirements of the Employment Rights Act 1996.

Yours sincerely

**Mr Andrew Brown**

**Headteacher**

**For and behalf of EPM MAT**

## Fields

**Governing Body/Trustees:** Delete as appropriate.

**Job Title:** This is the **Job Title** within **Job Information** in EPM Connect.

**School Name:** This is the relevant **Property Name** in EPM Connect.

**End Date:** This is the **End Date** field within **Job Information** in EPM Connect.

**School/Trust (Governing body/Trustees:** Delete as appropriate

# Support Contract

**Date**

**Private and Confidential**

**Title First Name Surname**

**Address Line 1**

**Address Line 2**
**Address Line 3**

**Postcode**

**Dear First Name**

I have pleasure in confirming your appointment, on behalf of the **Governing Body/Trustees/Board** of **Property Name** ('the Employer'), **Address Line 1, Address Line 2, Address Line 3, Postcode**, as a member of the support staff.

**This letter is your contract of employment and contains a statement of the applicable terms of employment given in accordance with the requirements of the Employment Rights Act 1996 and the relevant provisions of the Academies Act 2010.**

**1** This only applies to academies.

**Name of Employee** **First Name Surname ('you')('your')** of **Address Line 1, Address Line 2, Address Line 3, Postcode.**

**Job Title** **HLTA,** a job description will be provided.

**Date of Appointment** **Start Date**

**Type of Appointment**

This is a **permanent/temporary/fixed term** appointment, subject to the probationary period and termination clauses. **2** Additional content will be displayed for non-permanent appointments.

**Place(s) of Work**

**Your principal place of work will be Example School, Address Line 1, Address Line 2, Address Line 3, Postcode.** **3** Additional places of work can be added, along with wording which relates to the right for the employee to be asked to work at other sites within the Trust.

**Working Time**

a) You are employed on a **Full-Time basis**, **33.00** hours per week, **0.0000** weeks per year, worked according to the requirements of the Employer.

b) Core hours of work will predominantly be undertaken Monday to Friday, 8:00am to 5:00pm during your contractual working weeks.

Your normal working pattern is as follows:

**Monday, Tuesday, Wednesday, Thursday, Friday: 08:00 - 16:00**

You may be required to work such additional hours as may be necessary for the proper performance of your duties from time to time. If your hours and weeks or your working pattern need to be amended, the variation will be notified to you by the Employer prior to implementation.

c) Any agreed change to your hours of work will be notified in writing.

**Date of Continuous Service**

(a) **Continuous Service Start Date**

(b) **Continuous Service Start Date within Organisation** (subject to verification)

a) This is the date on which your statutory employment rights, such as unfair dismissal (but excluding redundancy payment purposes) are based.

b) This is your local government continuous service date and is used for those contractual purposes defined in the conditions of service. Your entitlement to redundancy payment in this post will be based on the Date of Appointment of this contract. Previous continuous service, but not concurrent service, may also be considered if it was work carried out with an employer listed within the Redundancy Payments (Continuity of Employment in Local Government, etc.) (Modification) Order 1999, as amended from time to time.

**Salary**

a) Salary Scale: **Salary Scale** Salary Point: **Pay Scale**

**FTE Salary:** £**Salary** per annum **Pro rata salary:** £**FTE Salary** per annum

**b) Every effort will be made to make accurate salary and other payments to you on the due date. Should an overpayment occur or should you owe monies to your employer in connection with your employment, you will be advised of the amount involved and consulted about your preferred method of repayment. If agreement is not reached the employer shall be entitled to deduct from your salary or other payments due to you any money which you may owe to the employer at any time.**

**c) Your salary will increase on the anniversary of 5 years/10 years/15 years service to reflect an additional allowance for long service leave.**

**d) By local arrangement your salary is paid in 12 equal monthly instalments (known as the equated year) by bank credit and employment is continuous throughout the year. Employees who begin employment part way through the month will be paid proportionally to the number of calendar days in the month. Please give details of your account to the Office as soon as possible.**

**If your employment terminates before the last day of term, you will be paid not less than you are entitled to receive for the time you have worked with a proportional allowance for holidays.**

**If your employment terminates before the last day of term and you have been overpaid, the amount overpaid will be deducted from your salary, but if the amount due exceeds your final salary you will be required to repay the sum outstanding.**

**e) You will receive a monthly detailed pay advice slip indicating your gross salary and deductions made. It is your responsibility to ensure the appropriate deductions are taken**

**in relation to pensions. Please check your payslip carefully to ensure pension has been deducted if appropriate and if not notify the Office immediately.**

**If form SSP1L was issued by your former Employer this should be given to the Office on your first day of work.**

**Please contact your Setting for a Benefits Statement.**

**4** Dependent on information provided to EPM. This is currently under review.

## Training

All staff are required to regularly undertake training and updates that are relevant to their role including Safeguarding, Data Protection and Whistleblowing training. Specific additional training includes:

**Training Requirements**.

**5** This information is pulled from the **Training Requirements** field within **Job Information** in the E**mployee Record.**

Any further training requirements will be identified during your induction period.

## Holiday Entitlement

Subject to the statutory minimum annual leave entitlement, you are paid for **Paid For Weeks** weeks per year. This is made up of **Working Weeks** weeks worked and **Holiday Entitlement in Weeks** weeks paid annual leave. Your entitlement to annual leave is calculated pro rata to the following fulltime entitlement:

**Holiday Entitlement in Weeks** Weeks holiday per year (inclusive of **X** extra-statutory days and a concessionary day)

**6** We will honour current content regarding holiday entitlement if we have received it prior to migration to Connect.

8 Statutory Bank Holidays

For the avoidance of doubt, your holiday entitlement will be the greater of your pro-rata contractual entitlement or the statutory minimum.

On the completion of five years continuous local government service the annual leave entitlement increases to **XX** days per year. On the completion of ten years continuous local government service the annual leave entitlement increases to **XX** days per year. On the completion of fifteen years continuous local government service the annual leave entitlement increases to **XX** days per year.

As your salary reflects your entitlement to annual leave, and increases each time you become eligible to additional leave to recognise length of service, leave may not normally be taken during the **XX** weeks per year that you are contracted to work. If, in exceptional circumstances, leave is granted during this time it will normally be without pay.

## Sick Leave

Subject to the provisions of the scheme a member of staff who is absent from duty owing to illness shall be entitled to receive, in any twelve month period, contractual sick pay, as follows provided that the employee complies with the absence notification requirements and produces self-certificates and/or doctors statements as required:

| | |
|---|---|
| During first year of service | one month's full pay and, after completing four calendar months service, two months half pay |
| During second year of service | two months full pay and two months half pay |
| During third year of service | four months full pay and four months half pay |
| During fourth and fifth years of service | five months full pay and five months half pay |
| After five years' service | six months full pay and six months half pay |

If a period of absence is or appears to have been caused by negligence or other action by a third party in respect of which you may be able to recover compensation, you must immediately notify your manager and provide such further information and cooperation in relation to any legal proceedings as is reasonably required. Any sick pay or other payments made to you in respect of that period shall be repayable on demand, provided that the amount to be repaid shall not exceed any compensation you recover for loss of earnings less any costs you incur in connection with such recovery.

**Sick Pay**

Sick Pay shall include, where appropriate, Statutory Sick Pay, and shall not exceed full (ordinary) pay.

Full details of the contractual sickness pay scheme and Statutory Sick Pay where entitled, are set out in the national agreements referred to under the General Conditions detailed.

For further written information about your terms of employment relating to sickness or injury, or sick pay you should refer to:

i) The Sickness Absence Policy, which is available from the Office.

ii) Current conditions of service as set out in the NJC for local government employees, otherwise known as the 'Green Book'.

iii) Conditions of service agreed locally between the Employer and recognised unions.

**Notice of Termination**

**After successful completion of the probationary period referred to in the probationary clause, the prior written notice required from you or the Employer to terminate your employment, unless stated elsewhere in this contract shall be as follows**:

| **Service** | **Period of Notice** | |
|---|---|---|
| | **By the Employee** | **By the Employer** |
| **Less than 4 years** | **1 month** | **1 month** |
| **4 years but less than 8 years** | **1 month** | **2 months** |
| **8 years and over** | **1 month** | **3 months** |
| **All PO Grades - Any Service** | **2 months** | **3 months** |

**8** Standard text, unless otherwise provided to EPM Team.

Notice of termination may be given by either side at any time.

If you are employed up to and including the last day of the term and have worked the complete term, you will be paid as though you had been employed until the end of the holiday following the term as follows:

| Last day of | Paid as though worked to: |
|---|---|
| Summer term | 31 August |
| Autumn term | 31 December |
| Spring term | 30 April or last day of Easter Holiday, whichever is earlier |

**9** Standard text, unless otherwise provided to EPM Team.

The Employer reserves the right to make a payment in lieu of notice (PILON) for all or any part of your notice period on termination of your employment. This provision, which is at the Employer's discretion, applies irrespective of whether notice to terminate the contract is given by the Employee or by the Employer.

You will be compensated by being given a payment in lieu of the notice, amounting to the payment that you would have received if you had worked your full notice period. The termination of your employment will be effective from the termination date, regardless of when the PILON payment is made.

The Employer shall be entitled to dismiss you at any time without notice (or payment in lieu of notice) if you are summarily dismissed for an act of gross misconduct, in accordance with the Employer's Disciplinary Procedure, or if you cease to be entitled to work in the UK.

**Pre-Employment Checks**

This contract is subject to the following checks, unless exceptionally you are exempt any of the checks, in accordance with the relevant paragraphs below:

- Two employment references satisfactory to the Employer
- Medical clearance
- Enhanced Disclosure and Barring Service (DBS) clearance satisfactory to the Employer
- Satisfactory completion of a Staff Disqualification Declaration
- Confirmation of qualifications
- Verification of Identity and of the Right to Work in the UK
- Proof of NI Number

**References**

The appointment is subject to two satisfactory references; one of which must be from your most recent employment working with children. At the discretion of the Employer, other suitable referees may be acceptable if this requirement cannot be fulfilled.

**Medical Fitness**

The appointment is subject to satisfactory evidence of medical fitness. You should already have completed a medical questionnaire prior to your appointment. If you have not yet completed a questionnaire please inform your Employer (this requirement may be waived where medical fitness for employment with the Employer has recently been established).

A copy of the Employer's procedure on the notification of absence for staff and notes on the submission of medical certification is available from the Office.

**Disclosure and Barring Service (DBS) Clearance**

In accordance with the requirements of the Home Office this appointment is subject to an enhanced check for regulated activity by the DBS.

Your post is exempt under the Exceptions Orders to the Rehabilitation of Offenders Act 1974. **You are required to disclose details of all adult cautions (simple or conditional), convictions, bindover orders and warnings even if they are spent, except for those listed as protected cautions and convictions. Please refer to the DBS website, www.gov.uk/government/publications/new-guidance-on-the-rehabilitation-of-offenders-act-1974, for more information. If you have failed to make any relevant disclosure or have included false or misleading information therein, you will be liable to dismissal.**

If during the course of your employment you are arrested, or summonsed for an offence or receive a conviction, a bindover order or a warning given by a police force you are required to inform your Employer of this fact immediately. Such information will be treated in confidence, so far as this is consistent with the safety of children and compliance with statutory child protection procedures. **Failure to disclose such information may result in disciplinary action which could lead to the termination of your employment.**

**Disqualification**

In accordance with the provisions of The Childcare Act 2006 and The Childcare (Disqualification) Regulations 2009 and Childcare (Early Years Provision Free of Charge) (Extended Entitlement) (Amendment) Regulations 2018, there is a requirement on some staff in educational settings to disclose relevant information.

This requirement will apply to your employment if you work in an Early Years setting with children (from birth until 1 September following a child's fifth birthday) or Later Years childcare (children above reception age but who have not attained the age of 8) in nursery, primary or secondary school settings, or if you are directly concerned with the management of such childcare. **Failure to disclose such information may result in disciplinary action which could lead to the termination of your employment.**

## Right to Work in the UK

You are required to provide to the Employer relevant documentation to warrant that you are entitled to work in the UK (in accordance with the Immigration, Asylum and Nationality Act 2006). You are required to show the Employer your current passport, which will be copied and returned to you. If you do not hold a British passport, you are required to prove you have been granted settled status under the EU Settlement Scheme, further information can be found at www.gov.uk/settled-status-eu-citizens-families. You must contact the Office to find out which documents you will need to provide.

You warrant that you are entitled to work in the UK without any additional approvals and will notify the Employer immediately if you cease to be so entitled at any time during your employment with the Employer.

If you require immigration permission to work in the UK and the Employer acts as a sponsor, you must:

a) On request, provide the Employer with such documentary evidence as it requires from time to time, to prove that you have immigration permission to work for the Employer in the role set out in this contract and in order for it to check your visa status.

b) Notify the Employer immediately of any change to your immigration status.

c) Keep the Employer notified of any changes to your home address and telephone number (including mobile number, if you have one). For these purposes, you should be aware that the Employer needs to maintain a history of your contact details, not just your current details.

d) Notify the Employer of any change in circumstances which may affect your right to work for the Employer or to live in the UK.

## Income Tax and National Insurance

You should forward your Income Tax form P45 as soon as you take up your employment. If you do not have a form P45, you must complete a Starter Checklist.

## Probationary Service

The first 6 months of your employment shall be a probationary period and your employment may be terminated during this period at any time on one week's notice. The Employer may, at its discretion, extend this period. During this probationary period your performance and suitability for continued employment will be monitored.

**10** If probation is marked as passed, within the **Probation** section of the **Employee Record** this paragraph will not appear. Otherwise, it defaults to 6 months unless otherwise recorded in probation section of employee record.

## General Conditions

The conditions of service are determined by collective agreements made at the National Joint Council for Local Government Services and locally between the Employer and the Trade Unions. Master copies of the national and local conditions of service are available on request from the Office.

**Policies and Procedures**

Copies of policies and procedures including Equal Opportunities policy, Health and Safety policy, Trade Union policy, Flexible Working and Leave policies are available from the Office.

These policies and procedures do not form part of your contract of employment.

**Disciplinary Rules and Procedures**

Disciplinary matters are managed in accordance with the Disciplinary Rules and Procedures.

If you wish to appeal against a disciplinary decision you may apply in writing in accordance with the Disciplinary Procedure.

The Employer reserves the right to suspend you for the purposes of investigating any allegation of misconduct or neglect against you.

This procedure does not form part of your contract of employment.

**Grievance Procedure**

If you have a grievance about your employment you should first raise it with your line manager either orally or in writing. If the matter is not resolved you are entitled to pursue it formally through the Grievance Procedure.

This procedure does not form part of your contract of employment.

**Local Government Pension Scheme**

The Local Government Pension Scheme (LGPS) is administered on behalf of employees at the Setting. For the purpose of The Local Government Pension Scheme Regulations 2013 you are treated as a whole time employee.

All employees who are employed on a contract for 3 months or more, and who are under the age of 75, will automatically become a member of the scheme although have the right to opt out of the scheme. Those employees on a contract for less than 3 months have the right to opt into the scheme, but will not be automatically entered into the scheme unless their contract is extended beyond 3 months, in which case they will automatically become members of the scheme from the date the contract is extended.

If you wish to opt out of the scheme you should contact the scheme administrator for an opt out form. An opt out form is not valid if completed prior to this employment commencing. Where an opt out form is completed within 3 months of this employment commencing, a full refund of contributions will be made via the payroll administrator. Where an opt out form is completed after 3 months, but within 2 years of this employment commencing, a refund of contributions can be requested which will be processed by the scheme administrator. Completed opt out forms should be given to the Office or sent direct to the payroll provider.

If you intend to remain a member you should complete and return a Membership Information form and an Expression of Wish form to the scheme administrator as soon as possible. Failure to do so may reduce the value of your final pension and limit your future options, particularly if you have other pensions held elsewhere, including with other Associate Employers.

Further details about the scheme, including the age at which you may access your pension, whether this is in full or actuarially reduced, is available in the scheme guide, available from the scheme administrator.

Information on the Local Government Pension Scheme, including the forms referred to above, can be found by following this link: Contact your fund :: LGPS (lgpsmember.org)

**Regular Re-Enrolment**

If you decide at any time to opt out of membership of the LGPS you will automatically be re-enrolled into the scheme on the 're-enrolment date' if, on that date, you are aged at least 22, under State Pension Age and earning more than the monthly earnings figure specified by the regulations, unless you had opted out within 12 months prior to the 're-enrolment date'.

Re-enrolment will take place on the third year anniversary of the Auto-enrolment implementation date and you will be notified in writing prior to this date explaining the implications of the re-enrolment requirements.

**Confidential Information**

For the purposes of this clause 'Confidential Information' includes information in whatever form relating to the Employer, students (past and present), agents, officers, employees, members of the Governing Body/Trustees/Board, such information to include (but not limited to) details relating to finances, results, schemes of work, personal information, whether or not such information is marked confidential. The Employee shall not (except in the proper course of their duties, as authorised by the Employer, either during or after the appointment or at any time after the termination of the employment, (howsoever arising)):

a) use any Confidential Information

b) make or use any copies

c) disclose any Confidential Information to any person, Company or other organisation whatsoever.

All Confidential Information and copies shall be the property of the Employer and on termination of the appointment or at the request of the Employer, at any time during the appointment the Employee shall hand over all Confidential Information or copies.

Nothing shall prevent the Employee from disclosing information which they are entitled to disclose under the Public Interest Disclosure Act 1998, provided the disclosure is made in accordance with the provisions of that Act.

**Employer Property**

All documents, manuals, hardware and software provided for your use by the Employer, and any data or documents (including copies) produced, maintained or stored on the Employer's computer systems or other electronic equipment (including mobile phones), remain the property of the Employer.

Any property of the Employer in your possession and any original or copy documents obtained by you in the course of your employment shall be returned to your line manager at any time on request and in any event prior to the termination of your employment with the Employer.

**Outside Interests**

During this employment, you shall not, without the prior written authority of the Employer, whether paid or unpaid, be directly or indirectly engaged, concerned or have any financial interest as an agent, consultant, director, employer, owner, partner, shareholder or other capacity in any other business, trade, profession or occupation (or the setting up of any business, trade, profession or occupation).

**UK General Data Protection Regulation (UK GDPR)**

The Employer collects and processes personal data relating to its employees to meet its obligations under the employment contract and to comply with its legal obligations. The Employer takes the security of your data seriously. The Employer is committed to being transparent about how it collects and uses that data and to meeting its data protection obligations.

Where the Employer processes special categories of personal data, such as information about ethnic origin, sexual orientation, health or religion or belief, this is done for the purposes of equal opportunities monitoring. Data that the Employer uses for these purposes is only collected with the express consent of employees, which can be withdrawn at any time.

The Employer has policies and controls in place to try to ensure that your data is not lost, accidentally destroyed, misused or disclosed, and is not accessed except by its colleagues in the performance of their duties. You have some obligations under your employment contract to provide the organisation with data. You may also have to provide the organisation with data in order to exercise your statutory rights, such as in relation to statutory leave entitlements. Failing to provide the data may mean that you are unable to exercise your statutory rights.

The Employer takes its responsibilities under data protection seriously and all policies are available from the Office which you are required to read and understand.

**Entire Agreement**

This agreement together with any documents referred to within it sets out the entire agreement and understanding between the parties and supersedes all prior agreements, understandings or arrangements (oral or written) in respect of the employment or engagement of the Employee by the Employer. No purported variation of this agreement shall be effective unless it is in writing and signed by or on behalf of each of the parties.

**Third Parties**

Unless expressly provided in this agreement, no term of this agreement is enforceable pursuant to the Contracts (Rights of Third Parties) Act 1999 by any person who is not a party to it.

**Governing Law and Jurisdiction**

This agreement shall be governed by and construed in accordance with English law.

Each of the parties irrevocably submits for all purposes in connection with this agreement to the exclusive jurisdiction of the English courts.

**Changes to Written Particulars**

The Employer reserves the right to make reasonable changes to any of your terms and conditions of employment. You will be notified in writing of any changes as soon as possible and in any event within one month of the change.

**Acceptance of the Appointment**

This contract is subject to satisfactory references, medical clearance and a Disclosure and Barring Service clearance and shall not take effect in the event of any adverse response being received or discovered from any enquiry or examination made or specified at the time of appointment, in order to safeguard the well-being of the pupils, or as a result of a condition specified by the Employer at that time.

On acceptance of this appointment, this document will form the principal statement of employment particulars in accordance with the requirements of the Employment Rights Act 1996.

Yours sincerely

**Mr Andrew Brown**

**Headteacher**

**For and behalf of EPM MAT**

## Fields

**Governing Body/Trustees:** Delete as appropriate.

**Job Title:** This is the **Job Title** within **Job Information** in EPM Connect.

**School Name:** This is the relevant **Property Name** in EPM Connect.

**End Date:** This is the **End Date** field within **Job Information** in EPM Connect.

**School/Trust (Governing body/Trustees:** Delete as appropriate

**X:** Defaults to 10 days unless otherwise confirmed with HR Admin Team.

## Contractual Change Letters

These include:

- Amend Appointment Letter
- Extend Appointment Letter
- MAT Transfer
- Post Regrade
- Sabbatical
- Secondment
- Recruitment Incentive
- Training Agreement

# Amend Appointment Letter (Contractual Change Letter)

**Date**

**Private and Confidential**

**Title First Name Surname**

**Address Line 1**

**Address Line 2**
**Address Line 3**

**Postcode**

Dear **First Name**,

I am writing to confirm the arrangements as agreed by the **Signatory Job Title** in your role of **Job Title** at **Property Name**.

Your pro-rata salary will be **Actual Salary** (including allowances) per annum, effective from **Effective Date**.

All other conditions of your employment remain unchanged and are as detailed in the statement of particulars previously issued to you and any subsequent correspondence.

If you have any queries regarding this matter please speak to me in the first instance.

Yours sincerely

**Signatory Name**

**Signatory Job Title**

**Property Name**

## Fields

**Signatory Job Title:** This is the job title of the signatory, agreed with your HR Admin Team.

**Job Title:** This is the **Job Title** within **Job Information** in the **Employee Record**.

**Property Name:** This is the relevant **Property Name** in the **Employee Record**.

**Actual Salary:** This is the relevant **Salary** within **Salary Information** in the **Employee Record**.

**Effective date:** This is the **Effective Date** within **Salary Information** in the **Employee Record**.

**Signatory:** This is the name of the signatory as agreed with your HR Admin Team.

# Extend Appointment Letter

**Date**

**Private and Confidential**

**Title First Name Surname**

**Address Line 1**

**Address Line 2**
**Address Line 3**

**Postcode**

Dear **First Name**,

I am writing to confirm that with effect from **Effective Date**, your post of **Job Title** at **Property Name** has been extended to **End Date**. Your hours of work will be **Hours** hours per week, **Working Weeks** weeks per annum, **FTE** FTE per week.

Your working pattern is as follows:

**Enter Working Pattern**

Your salary on **Pay Range**, **Pay Scale** will be **Actual Salary** (including allowances) per annum, proportionate to the full time rate of **Full Time Equivalent Salary**.

All other conditions of your employment remain unchanged and are as detailed in the statement of particulars previously issued to you and any subsequent correspondence.

If you have any queries regarding this matter please speak to me in the first instance.

Yours sincerely

**Signatory Name**

**Signatory Job Title**

**Property Name**

## Fields

Text highlighted in pink in the above example all relate to the available named fields within the **Job Information** and **Salary Information** tabs of the **Employee Record** within EPM Connect.

If **Working Pattern** displays **Enter Working Pattern**, the **Working Pattern** or the **Active From Date** within **Job Information** has not been entered in the **Employee Record**.

# Non-Renewal Letter

**Date**

**Private and Confidential**

**Title First Name Surname**

**Address Line 1**

**Address Line 2**
**Address Line 3**

**Postcode**

Dear **First Name**,

Further to the statement of particulars previously sent to you for your post of **Job Title** at **School Name**, I am writing to confirm that your appointment terminates on Effective Date. The School does not intend to renew your appointment **Enter Reason**.

You have the right to contest the non-renewal of your appointment at a meeting of the appropriate **Committee of the Governing Body / Trustees**. [1] 1. Delete as appropriate.

If you wish to exercise this entitlement please notify **us** within ten days of receipt of this letter.

If you have no ongoing employment with us, your final payslip and P45 will be issued to you in due course. Please ensure that you take this opportunity to download all required documentation from EPM Connect before your final day of employment. If your final pay date is after your last day of employment, your P45 and final payslip will be provided to you separately.

May I take this opportunity to thank you for your contribution in this post since your appointment.

Yours sincerely

**Signatory Name**

**Signatory Job Title**

**Property Name**

## Fields

**Effective Date:** This is the **Effective Date** within **Job Information** in the **Employee Record**.

**Job Title:** This is the **Job Title** within **Job Information** in the **Employee Record**.

**Property Name:** This is the relevant **Property Name** in the **Employee Record**.

**Enter Reason:** This should be completed manually by the customer.

**Committee of the Governing Body / Trustees:** Delete as appropriate

## Resignation Letter

There are three options available for resignations. The option chosen will depend on the nature of the resignation.

1. Employee has resigned from one post but continues to hold other posts within the organisation.
2. Employee has resigned from all posts within the organisation.
3. Employee has resigned from one post but is starting another post within the same property. Ie. a new contract or something will be required

## 1. Employee has resigned from one post but continues to hold other posts within the organisation.

**Date**

**Private and Confidential**

**Title First Name Surname**

**Address Line 1**

**Address Line 2**
**Address Line 3**

**Postcode**

Dear **First Name**,

Thank you for your recent letter informing me of your intention to resign from your **Job Title** post with effect from **End Date**.

May I take this opportunity to thank you for your contribution since your appointment.

If you have any queries regarding this matter please speak to me in the first instance.

Yours sincerely

**Signatory Name**

**Signatory Job Title**

**Property Name**

### Fields

**Job Title:** This is the **Job Title** within **Job Information** in the **Employee Record**.

**End Date:** This is the **End Date** field within **Job Information** in the **Employee Record**.

## 2. Employee has resigned from all posts within the organisation.

**Date**

**Private and Confidential**

**Title First Name Surname**

**Address Line 1**

**Address Line 2**
**Address Line 3**

**Postcode**

Dear **First Name**,

Thank you for your recent letter informing me of your intention to resign from your post as **Job Title** at **School Name** with effect from **End Date**.

Your final payslip and P45 will be issued to you in due course. Please ensure that you take this opportunity to download all required documentation from EPM Connect before your final day of employment. Access to My Portal and therefore payslips and statements will be removed after three months [1. Change time period as appropriate. The school/trust will determine when access is removed..]. If your final pay date is after your last day of employment, your P45 and final payslip will be provided to you separately.

If you have any queries regarding this matter please speak to us in the first instance.

May I take this opportunity on behalf of **School/Trust Governing Body**[1]. to thank you for your contribution and to wish you all the best for the future. [2. Delete as appropriate.]

Yours sincerely

**Signatory Name**

**Signatory Job Title**

**Property Name**

### Fields

**Job Title:** This is the **Job Title** within **Job Information** in the **Employee Record**.

**School Name:** This is the relevant **Property Name** in the **Employee Record**.

**End Date:** This is the **End Date** field within **Job Information** in the **Employee Record**.

**School/Trust (Governing body/Trustees):** Delete as appropriate

## 3. Employee has resigned from one post but is starting another post within the same property. Ie. a new contract or something will be required

**Date**

**Private and Confidential**

**Title First Name Surname**

**Address Line 1**

**Address Line 2**
**Address Line 3**

**Postcode**

Dear **First Name**,

Following your new appointment, I confirm that your role of **Job Title** will cease with effect from **End Date**. May I take this opportunity to thank you for your contribution since your appointment.

A statement of particulars will follow.

If you have any queries regarding this matter, please speak to me in the first instance.

Yours sincerely

**Signatory Name**

**Signatory Job Title**

**Property Name**

### Fields

**Job Title:** This is the **Job Title** within **Job Information** in the **Employee Record**.

**End Date:** This is the **End Date** field within **Job Information** in the **Employee Record**.

# Sickness/Maternity Cover/Named Child Letter

**Date**

**Private and Confidential**

**Title First Name Surname**

**Address Line 1**

**Address Line 2**
**Address Line 3**

**Postcode**

Dear **First Name**,

Further to the statement of particulars previously sent to you for your temporary post of **Job Title** at **School Name**, I am writing to confirm that the school is terminating your temporary employment in this post with effect from **End Date**.

You have the right of appeal against the decision to terminate your employment to the Appeals Panel of the **Governing Body / Trustees**. [1] [1. Delete as appropriate.]. If you wish to appeal you should write to **Name**, at **School Name** within **X** working days of receipt of this letter

Your final payslip and P45 will be issued to you in due course. Please ensure that you take this opportunity to download all required documentation from EPM Connect before your final day of employment. If your final pay date is after your last day of employment, your P45 and final payslip will be provided to you separately.

May I take this opportunity to thank you for the work you have undertaken in this post since your appointment.

Yours sincerely

**Signatory Name**

**Signatory Job Title**

**Property Name**

## Fields

**Governing Body/Trustees:** Delete as appropriate.

**Job Title:** This is the **Job Title** within **Job Information** in the **Employee Record**.

**School Name:** This is the relevant **Property Name** in the **Employee Record**.

**End Date:** This is the **End Date** field within **Job Information** in the **Employee Record**.

**School/Trust (Governing body/Trustees:** Delete as appropriate

**Date:** This should be completed manually by the customer.

**X:** This should be completed manually by the customer.

# Add Addition Letter

**Date**

**Private and Confidential**

**Title First Name Surname**

**Address Line 1**

**Address Line 2**
**Address Line 3**

**Postcode**

Dear **First Name**,

I am writing to confirm that with effect from **Effective Start Date** you have been awarded an allowance of £**Full Time Amount** in recognition of duties undertaken for **Reason** in your role as **Job Title** at **Property Name**.

This is a temporary allowance until **Payment End Date**.

With effect from **Payment Start Date** your total salary will be **£Salary Plus Full Time Amount (Addition)** per annum, inclusive of any allowances payable.

All other conditions of your employment remain unchanged and are as detailed in the statement of particulars previously issued to you and any subsequent correspondence.

If you have any queries regarding this matter, please speak to the Headteacher in the first instance.

Yours sincerely,

**Signatory Name**

**Signatory Job Title**

**Property Name**

## Fields

**Effective Date:** This is the **Effective Date** field within **Job Information** in the **Employee Record**.
**Full Time Amount:** This is the **Full Time Amount** within the **Additional Payment** screen within **Additions** in the **Employee Record**.

**Reason:** This is the **Reason** within the **Additional Payment** screen within **Additions** in the **Employee Record**.

**Job Title:** This is the **Job Title** within **Job Information** in the **Employee Record**.

**Payment Start Date:** This is the **Payment Start Date** within the **Additional Payment** screen within **Additions** in the **Employee Record**.

**Payment End Date:** This is the **Payment End Date** within the **Additional Payment** screen within **Additions** in the **Employee Record**.

**£Salary plus Full Time Amount:** This is the **Salary** within the **Salary Information** page, plus **Full Time Amount** within the **Additional Payment** screen within **Additions** in the **Employee Record**.

# Extend Addition TLR Letter

**Date**

**Private and Confidential**

**Title First Name Surname**

**Address Line 1**

**Address Line 2**
**Address Line 3**

**Postcode**

Dear **First Name**,

I am writing to confirm that:

With effect from **Payment Start Date** your total salary will be £**Salary plus Full Time Amount (Addition)** per annum, inclusive of any allowances payable.

All other conditions of your employment remain unchanged and are as detailed in the statement of particulars previously issued to you and any subsequent correspondence.

If you have any queries regarding this matter, please speak to the Headteacher in the first instance.

Yours sincerely,

**Signatory Name**

**Signatory Job Title**

**Property Name**

## Fields

**Payment Start Date:** This is the **Payment Start Date** within the **Additional Payment** screen within **Additions** in the **Employee Record**.

**£Salary plus Full Time Amount:** This is the **Salary** within the **Salary Information** page, plus **Full Time Amount** within the **Additional Payment** screen within **Additions** in the **Employee Record**.

# MAT Transfer Letter

**Date**

**Private & Confidential**

**Title First Name Surname**

**Address Line 1**

**Address Line 2**
**Address Line 3**

**Postcode**

Dear **First Name**,

Following your transfer within the Trust to your new post of **Job Title**[1] at **Property Name**[1], I can confirm that your post of **Job Title**[2] at **Property Name**[2] will cease with effect from **End Date** .

Please ensure that your ID badge, laptop and any other property is returned to me as soon as possible and by **Date** at the very latest. All confidential information and copies shall be the property of **Property Name**[1] and on termination of your appointment must be handed over to your line manager.

Your final payslip and P45 will be issued to you in due course.

May I take this opportunity on behalf of **Property Name**[1] to thank you for the work you have undertaken in this post since your appointment and to wish you all the best for the future.

Yours sincerely,

**Signatory Name**

**Signatory Job Title**

**Property Name**

## Fields

**Job Title**[1]**:** This is the **Job Title** within **Job Information** in the **Employee Record** for the new post.

**Property Name**[1]**:** This is the **Property Name** in the **Employee Record** for the new post.

**Job Title[2]:** This is the **Job Title** within **Job Information** in the **Employee Record** for the previous post.

**Property Name[2]:** This is the relevant **Property Name** in the **Employee Record** for the previous post.

**End Date:** This is the **End Date** field within **Job Information** in the **Employee Record** for the previous role.

**Date:** This information is not held and is left as **Date** for the school to complete.

# Recruitment Incentive Letter

**Date**

**Private & Confidential**

**Title First Name Surname**

**Address Line 1**

**Address Line 2**
**Address Line 3**

**Postcode**

Dear **First Name**,

The retention incentive payment is to be made:

as a cash sum payment and is therefore subject to superannuation deductions.

OR

to support **Housing/Relocation/Travel Payment** and is therefore not subject to superannuation deductions.

1. Delete as appropriate.

All other conditions of your employment remain unchanged.

If you have any queries regarding this matter, please speak to the Headteacher in the first instance.

Yours sincerely,

**Signatory Name**

**Signatory Job Title**

**Property Name**

## Fields

**Housing/Relocation/Travel Payment:** Delete as appropriate.

# Regrade Letter

**Date**

**Private & Confidential**

**Title First Name Surname**

**Address Line 1**

**Address Line 2**
**Address Line 3**

**Postcode**

Dear **First Name**,

I am writing to confirm that with effect from **Effective Date** your post of **Job Title** at **Property Name** will be regraded to **Pay Range Name**.

Your hours of work will be **Contract Hours** per week, **Working Weeks** per annum.

Your working pattern is as follows:

**Monday 9-3, Tuesday 9-3, Wednesday 9-3, Thursday 9-3, Friday 9-3.**

You may be required to work such additional hours as may be necessary for the proper performance of your duties from time to time. If your hours and weeks or your working pattern need to be amended, the variation will be notified to you by the employer prior to implementation.

Your salary on **Pay Range**, **Pay Scale** will be £**Salary** per annum .

This brings your total salary inclusive of allowances to £**Salary plus Additions**.

All other conditions of your employment remain unchanged and are as detailed in the statement of particulars previously issued to you and any subsequent correspondence.

If you have any queries regarding this matter, please speak to the Headteacher in the first instance.

Yours sincerely,

**Signatory Name**

**Signatory Job Title**

**Property Name**

## Fields

**Effective Date:** This is the **Effective Date** field within **Job Information** in the **Employee Record**.

**Job Title:** This is the **Job Title** within **Job Information** in the **Employee Record**.

**Property Name:** This is the **Property Name** within EPM Connect.

**Pay Range Name:** This is the **Pay Range** field within **Salary Information** in the **Employee Record**..

**Shift Summary:** This information is pulled from the **Work Pattern** (ie Shift Patterns)

**Pay Range:** This is the **Pay Range** within **Salary Information** in the **Employee Record**..

**Pay Scale:** This is the **Pay Scale** within **Salary Information** in the **Employee Record**..

**£Salary:** This is the **Salary** within the **Salary Information** page.

**£Salary plus Full Time Amount:** This is the **Salary** within the **Salary Information** page, plus **Full Time Amount** within the **Additional Payment** screen within **Additions** in the **Employee Record**.

# Remove Addition Letter

**Date**

**Private & Confidential**

**Title First Name Surname**

**Address Line 1**

**Address Line 2**
**Address Line 3**

**Postcode**

Dear **First Name**,

I am writing to confirm that your allowance for **Addition Title**, previously awarded in recognition of duties undertaken for **Addition Reason** in your role as **Job Title** at **Property Name** will cease on **Effective Date**.

With effect from your total salary will be **£Salary plus Additions** minus the allowance being removed) per annum, inclusive of any allowances payable.

All other conditions of your employment remain unchanged are as detailed in the statement of particulars previously issued to you and any subsequent correspondence.

If you have any queries regarding this matter, please speak to the Headteacher in the first instance.

Yours sincerely,

**Signatory Name**

**Signatory Job Title**

**Property Name**

## Fields

**Addition Title:** This is the **Addition Title** field within the **Additions** within **Additions and Deductions** in the **Employee Record**.

**Addition Reason:** This is the **Reason** within the **Additions** within **Additions and Deductions** in the **Employee Record**.

**Job Title:** This is the **Job Title** within **Job Information** in the **Employee Record**.

**Property Name:** This is the **Property Name** in EPM Connect.

**Effective Date:** This is the **Effective Date** field within **Job Information** in the **Employee Record**.

**£Salary plus Full Time Amount:** This is the total salary which is the figure listed within the **Salary** field within the **Salary Information** page, plus the figure listed within the **Full Time Amount** within the **Additional Payment** screen within **Additions** in the **Employee Record**.

# Sabbatical Letter

**Date**

**Private & Confidential**

**Title First Name Surname**

**Address Line 1**

**Address Line 2**
**Address Line 3**

**Postcode**

Dear **First Name**,

Further to your request for unpaid leave of absence from your post as a **Job Title** at **Property Name** for the period **Start Date** to **End Date**, I am writing to confirm that your request has been approved. **1.** Start Date and End will not be automatically populated but instead should be entered by the school/Trust The Effective Date added to the system should be no later than the last day before their Sabbatical begins, or there will be no active role to source the fields displayed in teal.

The terms and conditions of your employment will remain in place throughout your sabbatical leave.

(You would be permitted to take on certain casual or part-time work during the career break provided that by undertaking this work you are not prevented from returning to work for the **Property Name**. However, you must not take up any paid employment during the break without the express, prior, agreement in writing from the **Headteacher/me.** If you do not obtain this express, prior, written agreement any paid employment may be regarded as a fundamental breach of contract and gross misconduct. The **Property Name** may then be entitled to terminate the contract without notice or pay.)

As you will be unpaid during your sabbatical leave, please note that you will not be contributing to the **Teachers Pensions Scheme/Local Government Pensions Scheme.** You are advised to contact the **Teachers Pensions Scheme/Local Government Pensions Scheme** to seek advice on the effect that a period of unpaid leave will have on your prospective benefits, as well as any options available to you to enhance your pension.

You must notify **Headteacher/me** in writing by **Date** to confirm your intended date of return, and you must return to work no later than the original agreed date of your return, **Date**, unless subsequently agreed otherwise. I would also ask that you provide the **Property Name** with your contact details, should it be necessary for us to contact you during your period of leave.

If you have any queries regarding this matter, please speak to **Headteacher/me** in the first instance.

Yours sincerely,

**Signatory Name**

**Signatory Job Title**

**Property Name**

## Fields

**Headteacher/me**: This is based on the job title of the headteacher/principal held within the system.

**Teachers Pensions Scheme/Local Government Pensions Scheme:** This will change automatically based on the job category of the employee.

# Secondment Letter

**COMPLETING THE SECONDMENT AGREEMENT**

***THIS PAGE MUST BE DELETED BEFORE ISSUE***

All sections in Red Font and/or Highlighted must be addressed by the PA as follows:

1) relevant information must be inserted or removed

2) paragraphs deleted if not applicable

3) check paragraph numbering remains correct when deleting sections

Once completed, the font colour must be changed to 'black' and the highlighting removed before issue.

**All Secondment Agreements MUST be checked and agreed by a HR Manager, Assistant Director or Director before being issued.**

**Remember to delete this page**

**THIS SECONDMENT AGREEMENT** is made on [[DownloadDate]]

**BETWEEN:-**

**(1) Property Name** ('the Employer')

**(2) Name of Host** ('the Host'), and

**(3) Title First Name Surname, JobTitle at Property Name.**

**1 Secondment**

1.1 The Secondment shall start from **Date** shall continue until **Date** or until terminated by any party giving no less than **X** weeks' written notice.

1.2 The Employer shall second the Employee to the Host for **number of hours/percentage F.T.E. of the contracted hours OR [on a full time basis exclusively** under the contract of employment. During this secondment, the Employee will continue to be available for outstanding issues at the Employer for which their personal attendance is required.

1.3 The Employee shall receive a salary of £XXX per annum for the duration of the Secondment. The Employee will revert to their substantive post with the Employer at the end of the Secondment.

**2 Services to be provided**

2.1 The Employee shall provide (the duties commensurate with their role at **Property Name OR (if performing different role) the duties of post**.

**3 Terms and Conditions**

3.1 The Employment Contract shall remain in force during the Secondment Period and remain unchanged except where amended by the terms of this agreement.

3.2 The Employer and the Employee shall comply with the terms of the Employment Contract during the Secondment Period.

3.3 The Host shall not, and shall not require the Employee to do anything that shall, breach the Employment Contract and shall have no authority to vary the terms of the Employment Contract.

3.4 The Host shall provide the Employer with such information and assistance as it may reasonably require to carry out its obligations as the Employee's employer.

3.5 Nothing in this Agreement will be construed to have effect as forming or recording any relationship of employer and employee between the Host and the Employee and nothing in this Agreement shall constitute or be construed as constituting or establishing any partnership or joint venture between the parties to this Agreement for any purpose whatsoever. **2.** Delete if not relevant.

**4 Payments**

4.1 The Employer shall continue to pay the Employee's salary and any allowances and make any deductions that it is required to make. The Host shall provide the Employer with details of any overtime done by the Employee during the Secondment period. The Host shall pay the Employer **£XXX** a **month** during the Secondment Period (inclusive of VAT) for the provision of the Employee's services.

The Host shall pay the Employee a sum equivalent to **FTE Value/Contract Hours** per week of the total amount payable by the Employer which shall include any deductions and any overtime

payments made to the Employee during the Secondment period and approved by the Employer in advance.

**1.** The above paragraph is only relevant for Teaching/Unqualified employees.

The Employer shall send the Host an invoice on or about the **date** of each month of the Secondment Period, addressed to [**NAME**] and specifying the payment due under this agreement in relation to the preceding [**month**] and the amount of VAT due on the payment. Such invoices shall be payable by the Host within **X** days of receipt of the invoice **OR** by **date** of that **month.** **2.** Delete as appropriate.

**3.** The above paragraph is only relevant for Non-teaching employees.

**5 Management during Secondment**

5.1 Performance management will be conducted by the Employer. The views of the **Chair of the Governing Body/Headteacher (Principal)/Senior Management Team of the Host** will be sought and included within this process with regards to objectives settings and performance review.**4.** Delete as appropriate.

5.2 All matters of grievance and discipline shall be dealt with by the Employer in accordance with its normal procedures. The Host agrees to co-operate fully with the Employer and to raise all matters that may require disciplinary action by the Employer at the earliest opportunity.

5.3 The Host shall have day-to-day control of the Employee's activities but as soon as reasonably practicable shall refer any management issues concerning the Employee that come to its attention to the Employer. The Employer shall continue to deal with any management issues concerning the Employee during the Secondment Period, where relevant following consultation with the Host.

**6 Periods of Leave**

6.1 The Employee shall continue to be eligible for sick pay, holiday pay and any absence entitlements in accordance with the Employment Contract, and shall remain subject to the Employer's approval and notification procedures.

6.2 The Employer shall [consult with the Host before approving any holiday request made by the Employee OR notify the Host of any dates on which the Employee shall take holiday.

**5.** Delete above as appropriate.

**7 Termination of Agreement**

7.1 This Agreement will automatically terminate without notice or payment in lieu of notice upon the expiration of the Term of the termination of the Employee's contract of employment by the Employer.

7.2 [This Agreement may be terminated by the Employee at any time upon providing the Employer and the Host with a minimum of three months written notice.

**6.** Delete/edit above as appropriate.

7.3 [This Agreement may be terminated by the Host of the Employer at any time upon providing the other and the Employee with a minimum of three months written notice.

**7.** Delete/edit above as appropriate

7.4 On termination of the Secondment the Employee shall return any property of the Host and irretrievably delete any information relating to the Host, either electronic or otherwise, from the Employee's property.

7.5 For a period of X months after the end of the Secondment Period, the Host shall not induce or seek to induce the Employee to leave his employment with the Employer, or employ or engage the Employee without the Employer's prior written consent.

**8.** Delete/edit above as appropriate

**8 Indemnities and Liabilities**

8.1 The Employee will remain employed by the Employer for the duration of their secondment to the Host. It is agreement that the Employer shall be responsible for all income tax liability and National Insurance or similar contributions in respect of any payment to the Employee for the provision of Services by the Employee to the Host under this Agreement.

8.2 During the Secondment Period, the Host shall fulfil all duties relating to the Employee's health, safety and welfare as if it was their employer and shall comply with the Employer's reasonable requests in connection with the Employer's duties in relation to the Employee.

8.3 Both parties shall incur no liability for loss, damage or injury of whatever nature sustained by the Employee insofar as it arises wholly as a result of negligence or wilful default on the part of the other party or any of its employees or its students, its students' parents/carers or any other parties in contract with or otherwise connected to the other party.

8.4 Both parties shall indemnify the other against any an all claims, liabilities, actions, proceedings, costs (including legal fees, losses, damages, demands, penalties, fines or expenses suffered or incurred which are attributable to any act or omission by the other party or any other person for whom the other party is liable arising out of the employment of the Employee during the Term.

**9 Confidentiality and Data Protection**

9.1 The Employee warrants that their duties, as authorised by the Host, either during or after the Secondment Period:

a) use any Confidential Information relating to the Host

b) make or use any copies of any Confidential Information relating to the Host

c) disclose any Confidential Information relating to the Host to any person, Company or other organisation whatsoever.

9.2 All Confidential Information and copies shall be the property of the Host and on termination of the appointment or at the request of the Host, at any time during the appointment the Employee shall hand over all Confidential Information or copies.

9.3 Nothing shall prevent the Employee from disclosing information which they are entitled to disclose under the Public Interest Disclosure Act 1998, provided the disclosure is made in accordance with the provisions of that Act.

9.4 The Employee agrees to consent to the Host (and its agents) processing data relating to the Employee for legal, personnel, administrative and management purposes and in particular to the

processing of any ‘sensitive personal data’ (as defined in the Data Protection Act 1998) relating to the Employee.

**10 Dispute Resolution**

10.1 In the event of a disagreement of dispute on the part of any party to this agreement over its operation, the matter shall be raised with the [Chair of the Governing Bodies/Board of Directors Trustees] of the Employer and Host and a resolution sought. In the event that the matter cannot be resolved, a joint committee comprising three governors from each Governing Body shall be convened to consider the matter, and if the matter cannot be resolved by the committee, the respective Governing Bodies should be informed so that they may separately determine if notice will be given to terminate the agreement.

**11 Entire Agreement**

11.1 This agreement together with any documents referred to within it sets out then entire agreement and understanding between the parties and supersedes all prior agreements, understandings or arrangements (oral or written) in respect of the employment or engagement of the Employee by the Employer or the Host. No purported variation of this agreement shall be effective unless it is in writing and signed by or on behalf of each of the parties.

**12 Third Party Rights**

12.1 Unless expressly provided in this agreement, no term of this agreement is enforceable pursuant to the Contracts (Rights of Third Parties) Act 1999 by any person who is not a party to it.

**13 Governing Law and Jurisdiction**

13.1 This agreement shall be governed by and construed in accordance with English law. Each of the parties irrevocably submits for all purposes in connection with this agreement to the exclusive jurisdiction of the English courts.

## Fields

**Property Name:** This is the **Property Name** in EPM Connect.

# Training Costs Agreement

Between:

**Property Name** (The Employer)

and

**Title First Name Surname, Address 1, Address 2, Address 3 Postcode**

Place of Work: **Property Name**, **Address 1, Address 2, Address 3 Postcode**.

The Employer hereby agrees to fund the training course/course of study fees incurred by the Employee in pursuing the following training course/course of study:

**Course Name:**

**Provider:**

**Commencing:**

**Duration:**

The total cost of the training that will be met by the Employer is £**Total Cost**.

If the Employee fails to satisfactorily attend and/or satisfactorily complete the training course/course of study then 100% of all the training costs are to be paid in full by the Employee to the Employer. The Employer shall determine at its sole discretion, acting reasonably, whether the Employee has satisfactorily attended and/or satisfactorily completed the training course/course of study for the purposes of this Agreement.

If the Employee leaves the service of the Employer:

(1) before attending the training course but where the Employer has incurred liability for the cost of the training, 100% of all training costs incurred, or such proportion of the costs that cannot be recovered by the Employer from the course provider, are to be paid in full by the Employee to the Employer;

(2) either before completion of the course, or within **XX** months of the date of completion of the course, then 75% of all the training costs are to be paid in full by the Employee to the Employer;

(3) more than **XX** months, but not more than **XX** months, of the date of completion of the course, then 50% of all the training costs are to be paid in full by the Employee to the Employer.

(4) more than **/** months, but not more than **XX** months of the date of completion of the course, then 25% of all the training costs are to be paid in full by the Employee to the Employer.

No repayment of costs shall be required thereafter.

Prior to attending the above training course /course of study the Employee is required to meet with their Line Manager and agree the expected outcomes/benefits to the Employer. The Employee is then required to complete an internal evaluation of the study within 6 weeks of completing the training course/course of study. Outcomes/benefits to the Employer will be reviewed at mid-year appraisal review & end of year appraisal review.

The Employer reserves the right to deduct from the Employee's wages any money owed under this Agreement, subject to the provisions of the Employment Rights Act 1996.

The Employee agrees to the Employer deducting any monies owed from her wages, including from her final salary or any outstanding payments due to the Employee.