Inter - MAT Transfers

EPM Connect Guide

Document Control

Document Overview: This document outlines the step-by-step process for transferring an employee from one school to another within the same Trust.

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Document Approval
The Director of Operational Excellence shall review this guide annually and shall determine whether any further changes need to be made prior to approval.

This document was approved by Keren Prior, Director of Operational Excellence on 20th April 2026 and is issued on a version-controlled basis under her signature.

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Contents

MAT Transfers

Important

Do not archive the user from the original property. Archiving the user will remove access to all properties.

When moving an employee from one school to another, there are various steps that should be undertaken. It is also important to ensure continuity of employment details where applicable (e.g. service dates, entitlement rules). This preserves historical data while accurately reflecting the staff member's current role and location.

Please note that schools sharing a PAYE reference cannot pay one member of staff out of multiple schools without significant tax implications.

Step 1: Add the new property (school) to the User within Central Users.

Step 2: Add the employee as a new employee and link to the existing user.

Step 3: Add the new role(s) to the new property (school).

Step 4: End all roles held by the employee at the original property (school).

Step 5: End employment at the original property (school).

Step 6: Delete user groups and add Leaver user group at the original property (school).

A full step by step guide is shown below.

Step 1: Add a new property to the user

1. On the left-hand side of the EPM Connect window, select **Trust Overview**. A list of further menu options is displayed.
2. Select **MAT Admin**. A list of further menu options is displayed.
3. From the **MAT Admin** menu, select **Central Users**. The **Multi-site User Group Administration** page is displayed with a list of all current central user groups.
4. In the **Central Users** search box, enter the name of the user you wish to edit.
5. Click the pencil icon next to the user you wish to manage.
6. Click **Add Property** to add all relevant properties.

This will determine which properties are viewed by the users.

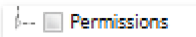
7. Tick the box next to the relevant properties, or click the box within the grey header to select all.

8. Click **Add Properties.**

The user will be granted access to the selected properties.

9. Click the **Permissions** button on the top right-hand side.

10. Click the small triangle next to **Permissions.**



11. Click the small triangle next to each Permission type.

This will expand the list of permissions.

12. Tick all relevant permissions.
13. Click **Save**

Please note that permissions take up to 120 seconds to update within the system.

Step 2: Add the employee and link to the existing user

All current employees will be added during implementation. However, any new employees can be added to the module either as individual employees via **Add Employee** or en masse via **Import Employees**.

Add new employee

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Click **Add Employee**. A new **Create Employee Record** page is displayed.
4. Complete the employee details.

Title, **Forename**, **Surname**, **Legal Gender for HMRC**, **Date of Birth**, **Marital Status** and **NI Number** are mandatory fields.

User Link

1. Select the relevant user from the **Link to Existing User** drop-down menu.

Important

Please ensure your Payroll Team have been informed that the user has worked with another school, as this may affect their payroll.

2. If the employee is not already a user, type an email in the **Enter New User Email** text box.

The **New User Email** should be the user's work email address and unique, i.e. not a group email.

3. From the **User Groups** drop-down menu, select all user groups that apply.

   User groups can be used to send tasks to groups of employees and manage bulk actions. User groups are managed by the Implementation Team and a list of user groups can be viewed within the **Adding Users and Permissions in EPM Connect Guide.**

Pre-Employment Checks

ID, **DBS** and **Right to Work** checks will automatically appear as checks to be completed within this section as they are mandatory. Scroll down and select any additional checks listed and speak to your Implementation Team should you need any additional checks to be added.

1. Within the **Pre-Employment Checks** section, click the **+ -** button. The section expands.

2. Select the checks which should be considered for this employee.

   Only checks selected will appear within the **Pre-Employment Checks** area of the **Employee Record**.

   Should you need any additional checks not listed, please speak to your Implementation Team.

Employment Record

In the **Employment Record** section, **Employment Start Date** is a mandatory field for Payroll integration.

Once a **Start Date** is added this employee becomes a **New Starter** within Payroll. Once **Start Date** and **Payroll Link** have been processed by the payroll, they will become non-editable fields.

1. In the **Start Date** field, select a start date.
2. From the **Payroll Link** drop-down menu, select the property.

   Payroll link options will display all payrolls available within this property/school, for example ABC Academy Support or ABC Academy Teaching.

   Important

   This field must be completed. If the **Payroll Link** field is not completed the employee will not be included in the Payroll. This applies to Payroll customers only.

3. In the **End Date** field, select an end date if known/applicable.

   This should only be used for **Fixed Term** contracts.

4. From the **Employment Type** drop-down menu, select **Employee** or **Off-Payroll Worker**.

   This applies to Payroll customers only. **Off-Payroll Worker** applies to anyone with an IR35.

New Starter Declaration

Important

Please note that although this section must be completed, the manual New Starter Checklist form or P45 should still be sent to your EPM Payroll Team via our Client Communication Platform.

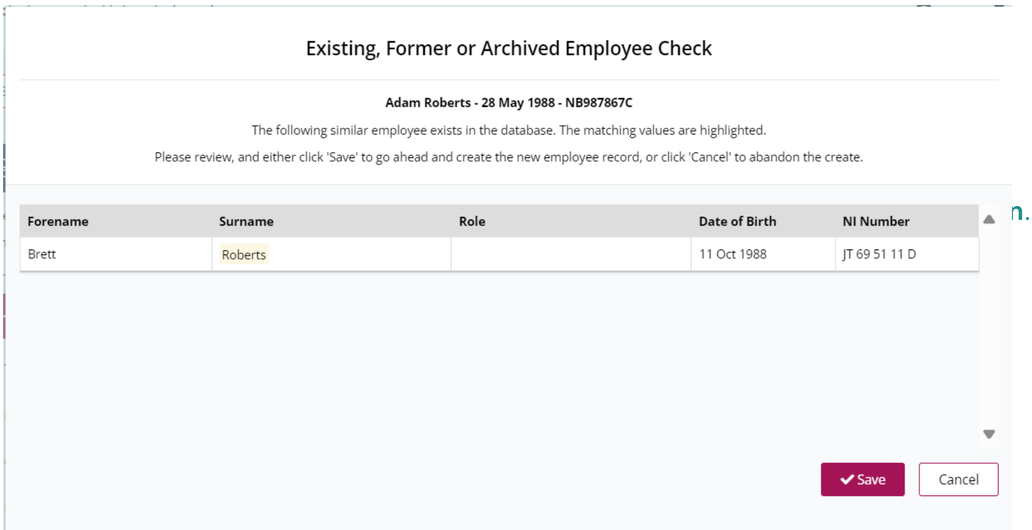
If you are not a Payroll customer, this section must still be completed. However, if you would prefer not to disclose this information, please select **Unknown**.

1. Select the **New Starter Declaration** that applies.
2. Click **Save** to finish.

If an Existing, former or archived employee check screen appears double check the details.

If no match is found, click on **Save** to continue. The employee record is created.

If a match is found, click **Cancel** to abandon this task and find the employee by selecting the relevant employee within **All Employees** tab within the **Main Navigation Pane**. To find the employee within archived or previous employees and see the **Archived and Previous Employees** section within the **Employees Guide.**



Important

If you are unsure, please do not proceed until this has been checked, as this may result in a duplicate being added to the system

Employee Record

The first seven tabs relate to the employee as a whole. In order for EPM to manage payroll and HR effectively, the fields within Personal Information should be completed.

The seven tabs displayed within the lower half of the page relate to the specific job role selected within the Select Job Role drop-down menu.

Once **Personal Information** has been completed you will need to **Add a job** and then complete the **Job Information** tab, **Salary Information** tab and where relevant the **Additions** and **Deductions** tab.

The information within the remaining tabs is not required, however we recommend completing as much of this information as possible in order to maximise reporting and analytics.

HR Admin Customers

Once the employee has been added, a number of tasks will be created for the school and your EPM HR Admin Team. Please view our **Contracts and Letters EPM Connect Guide** for more information.

Personal Information

Only those fields denoted by an asterisk or specified within this guide or the **Show Me How To** guides are mandatory.

Important

Do not enter **-** or **N/A** against any fields which are not relevant as this will be show within any letters or contracts.

1. If you are not already in **Edit** mode, click the **Edit Details** button. The page is re-displayed with editable fields.

   If adding details for the first time the page will automatically be editable.

2. In the **Preferred Name** field, enter a preferred name if relevant.
3. In the **Former Name** field, enter a former name if relevant.

   Important

   For HR Admin customers, please ensure that you complete the **Former Name** field in order for your EPM Team to carry out any pre-employment checks.

4. In the **Teacher Number field**, enter a teacher number.

   This field is only relevant to teachers.

5. From the **Legal Gender for HMRC** drop-down menu, select a gender.

   Legal Gender for HMRC is a mandatory field for EPM Payroll customers.

6. Tick the **Key Holder** box, if relevant.
7. The **Generated Employee Payroll No.** is automatically generated
8. In the **Car Registration** field, enter a registration number.

9. Within the **Employee Picture** section, click the **Select file** button.

10. Within the **Sensitive Information** section, click the **Show Sensitive Information** on the left-hand side.

11. Complete the **Sensitive Information** fields.

Sensitive Information (ED&I data)

Sensitive information includes **Ethnicity**, **Marital Status**, **Religion**, **Reasonable Adjustments**, **Medical Conditions** and **Allergies**.

This information will be hidden from users. To view the information, click the **Show Sensitive Information** button. The **Audit Trail** will record every instance that this information is viewed, including who and when it was viewed.

12. Within the **Contact Details** section, complete the fields.

Important

If a line of the address is not relevant leave this blank. DO NOT include - or N/A as these will appear in relevant letters and contracts for HR Essentials customers.

Work Email should not be overwritten.

13. Within the **Next of Kin** section, complete the fields.

Both **Contact Details** and **Next of Kin** can be completed by employees within **My Portal**.

14. Click **Save** to finish.

HR Admin Customers

Once the job has been added, a number of tasks will be created for the school and your EPM HR Admin Team. Please view our **Contracts and Letters EPM Connect Guide**.

Qualifications

Select the **Qualifications** tab on the left-hand side of the page. Complete the fields and click **Save**.

Qualifications are not mandatory but not completing this section may have an impact on HR Admin customers. HR Admin customers should ensure all relevant sections are completed for teachers, including fields relating to QTS and ECT Status and for HLTAs.

ID & Other Checks

This section will also display any **Other Checks** that have been added within **Employee Settings**.

Select the **ID & Other Checks** tab on the left-hand side of the page. Complete the fields and click **Save**.

MODULE TIP

Should a current Driving Licence be necessary for an employee, for example for minibus drivers, you may wish to add a task in Task Management to re-check this ahead of the expiry date.

Pre-employment Checks

Select the **Pre-employment Checks** tab on the left-hand side of the page, complete the fields and click **Save** to finish. You can also add new checks within the **Other Checks** tab of **Employee Settings** page.

The checks displayed relate to the checks chosen when completing the initial details for **Add an employee**. However, to add additional checks, tick the box on the far right-hand side of the check. The details for completion are displayed.

ID, **DBS** and **Right to Work** checks are mandatory for employees and will automatically appear as checks to be completed.

Payslips & Statements

Payroll Customers: All payslips, P45s and P60s will automatically appear within this section following each month's payroll. Employees can view payslips within **My Payslips and Statement**, in **My Portal**.

Employee Documents

You can view and upload documents to the overall **Employee Record** within the **Employee Documents** tab within the general **Employee Record**.

You are also able to view and upload standard and signable documents, which can be shared with the employee and saved within the employee record.

HR Admin customers

Please upload a copy of the employee's Application Form within this section.

Step 3: Add new roles to the new property

New job roles can be added to an **Employee Record**. The tabs under **Select Job Role** relate to each individual job role. The tabs above **Select Job Role** relate to the overall employee.

Important

Payroll customers only: When adding a new role you must ensure you add the **Primary Role** first. The Bank Details associated with this role will inform the bank account that is used to pay the employee.

To check whether a role is the primary role, check the **Primary Job Role** field within the **Employment Record** section of the **Employee's Record**. This can also be updated by the employee within **the Salary Information** section of **My Profile**, in **My Portal** as part of our self-service feature.

Payroll customers: Please ensure you inform your EPM payroll team should you receive a notification that **Bank Details** have been changed by an employee after the Payroll Cut Off Date. Any bank details added in the **Bank Details** section of any other role will not be used.

If there are no bank details against the primary role this, the employee will not be paid. This will be highlighted on the **Errors** page within the **Payroll** module.

1. Within the new Employee Record, from within the **Select Job Role** tab, click the **+** button. A new window is displayed.

2. From the **Post** drop-down menu, select a post, or leave as **None**.

   A number of posts can be set up within the **Posts** section of the **Employees** module. This is not mandatory, however can be used to create a list of filled and unfilled roles and will automatically populate the **Posts Map**, providing a useful organisation chart.

   Posts are mainly used for customers using the Recruitment module as they are mandatory for creating vacancies, but can also be used to create a Post Map.

3. In the **Job Title** field, enter a job title.
4. In the **Start Date** field, enter a start date.
5. In the **End Date** field, enter an end date, if applicable.

   This should only be completed for fixed term or temporary contracts and only if the temporary reason does not relate to cover or a named child.

   Important

   If an **End Date** is provided, the appointment will end on this date and the appointment will move into **Previous Employment**. However, if the employee is a leaver, you must manually process the employee as a leaver. We therefore recommend setting a task within **Task Management** as a reminder. See the **Resign Employee** within the **Employees Module Guide** for more information.

6. From the **Reports To** drop-down menu, select the Line Manager.

   The **Reports To** field will determine the standard approver for a variety of actions such as **Absence** and **Expenses**.

7. From the **Department** drop-down menu, select a department.

If the department you require is not available, please raise a request to your EPM Team via our **Client Communication Platform**.

8. From the **Job Category** drop-down menu, select a job category.
9. In the **Starter Tasks** field, select any starter tasks that apply.

   Starter Tasks are common tasks for starters that have been pre-configured in **Employee Settings**, preventing you from having to create these individually for each employee. Go to **Employee Settings** to create a variety of starter tasks to choose from.

10. Tick the **Casual Member of Staff** box, if this applies.

    Tick this box if the role relates to a casual or zero hours staff. Ticking this box will relax mandatory field requirements around job and salary information in the employee record.

    The **Add a new Employee – Casual Staff** guide within the Resource Centre provides a separate, simplified guide for adding Casual employees.

11. Tick the **Inside IR35** box, if this applies.

    Tick this box if this role is inside IR35. IR35 refers to an off-payroll worker.

    Ticking this box will relax mandatory field requirements around job and salary information in the employee record.

12. Tick the **Senior Leadership Team** box, if the member of staff is a member of the SLT.
13. The **Continuous Service Start Date** field, enter a date.

    A suggested date will appear based on the information already entered within the system but can be overridden.

    Continuous Service Start date is anything included within the modification order and can include service outside the current organisation (for example roles undertaken within Local Government or the police).

14. In the **Continuous Service Start Date within Organisation** field, enter a date.

    A suggested date will appear based on the information already entered within the system but can be overridden.

    Continuous Service Start Date within Organisation can be the date that the employee started within your organisation or where applicable with the Local Authority/Trust. The organisation responsible for the employee's payslip.

15. In the **Aggregated Service Date** field, enter a date.

    The Aggregated Service Date is the date from which you start counting a teacher's total service. Adjust the date to discount any breaks in teaching service. This is not the date they started their first teaching job.

16. From the **Contract Agreement Type** drop-down menu, select a contract agreement type.

    If the role is temporary or fixed term, in the **Temporary Reason** field, enter the reason for the role's temporary status. For example, Pupil Numbers.

Important

If the temporary reason is related to cover or support role relating to Family Leave or Named Child Support, please enter the word **Maternity Cover**, **Shared Parental Leave Cover**, **Named Child**, **Sickness Cover** and **Adoption Cover** within the **Temporary Reason**.

The reason provided will be included within letters and contracts.

17. From the **Contract Hour Type** drop-down menu, select a contract hour type.

Important

Carefully consider the options. Selecting the wrong option can result in incorrect calculations.

Part Time: 52 week staff working part time hours within this role.

Full Time: 52 week staff working full Time hours within this role.

Part Time Term Time Only: Term Time only staff working part time hours within this role.

Full Time Term Time Only: Term Time only staff working part time hours within this role.

Zero Hours: Casual staff working without set contracted hours within this role.

18. Click the **+ Add Job Role** button. The window closes and the employee record is displayed.

HR Admin Customers

Once the job has been added, a number of tasks will be created for the school and your EPM HR Admin Team. Please view our **Guide to EPM Connect Employees Module Tasks**.

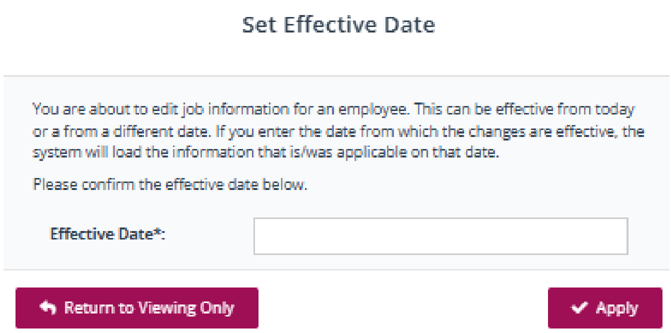
Job information

Some of these details will have auto-populated from the information provided within the **Add a job** screen.

Effective Date

The **Effective Date** will be pre-set with the employee's start date. If editing the role, the system will prompt you to select an effective date, once **Edit Details** has been selected. However, this can also be manually changed once editing the page.

The chosen **Effective Date** may alter the available options within the drop-down lists, if the settings have been edited between the selected date and today.



Basic Job Details

Some of these fields will already be populated from the information you completed when first adding the employee's details. This guide includes the key information required and does not include pre-populated fields or non-mandatory information.

1. From the **Type of Post** drop-down menu, select a type of post.

   This is required as part of the Workforce Census.

2. The **Entitlement Group** field will be populated once the job category is populated. This is a non-editable field.
3. From the **Account Code** drop-down menu, select an account code.

   This will be set up by EPM. If the option you need is not displayed, please speak to your EPM Team.

4. From the **Role Identifier** drop-down menu, select a role identifier.

   This is required as part of the Workforce Census.

5. From the **Cost Centre** drop-down menu, select a cost centre.

   This relates to budget codes and will be set up by the EPM Team within **Admin**, within **Main Settings**. If the option you require is not displayed, please speak to your EPM Team.

6. Tick the **Senior Leadership** box only if the employee is a member of the Senior Leadership Team or a Business Manager/Bursar.

   This is for reporting purposes.

7. In the **Job Description** field, enter a job description.

8. From the **Origin** drop-down menu, select an origin.

   This is required as part of the Workforce Census and describes the employee's employment or situation prior to this employment.

9. In the **End Date** field, enter an end date if relevant and known.

   Important

   Clicking within the **End Date** field will automatically populate today's date. Do not click in the field unless the role has ended.

10. From the **Destination** drop-down menu, select a destination.

    This is only relevant if an **End Date** has been entered. This is required as part of the Workforce Census and describes the employee's plan should they have given notice.

11. **Reason for Leaving** should only be completed when an employee leaves this role.
12. If the role has ended, enter the **Final Holiday Balance**.

    This should only be completed if the role has ended.

13. From the **Department** drop-down menu, select a department.
14. In the **Property** field, ensure the correct property is selected.

    This will default to the property in which you entered the information but can be changed to match the school that the employee is based in.

15. From the **Reports To** drop-down menu, select the relevant email address.

    This is the person the employee reports to, i.e. their Line Manager. This will be used in various modules for authorisation purposes where Line Manager has been selected.

    In the **Property Arrival Date** field, enter the date

    This is the date the member of staff starts/started at the school, not within this role. For example, if the person has recently worked within or currently works within the organisation within another role.

16. Tick the **Include In The School Workforce Census** box, if you wish the employee to be included in the Workforce Census.

    This box is ticked as default. If unticked, the role will not be included within the Workforce Census.

Contract Information

1. In the **Contract Number** field, enter a contract number if required.

   This refers to the organisation's internal contract number and will not be automatically populated. This is not a mandatory field.

2. In the **Required Notice Period** field, enter a number and select from **Days**, **Weeks**, **Months** or **Term**.
3. From the **Override Sick Leave Policy** drop-down menu, select the option that applies.

   Select the appropriate sickness policy for paid absence from the drop-down list, if this is different to your standard policy. These policies are set up within **Employees Settings**.

4. If using your standard policy, select **Not overridden**.
5. In the **Training Requirements** field, enter any training requirements or planned training.

   This information will appear within contracts created by your EPM Team.

Work Pattern

Work pattern is used to calculate holiday and absences.

> **Important**
>
> Work Pattern is mandatory.

1. From the **Working time Lost Measured In** drop-down menu, select **Days**.

   This information will be used to measure time lost for absences.

2. Click the **+ Add Shift** button. A new window is displayed.

   Shifts specify the hours worked each day. If the role has different hours for different days, each set of hours and days they apply to, should be created as a separate shift.

3. From the **Use a Template** drop-down menu, select the option that applies.

   Templates can be created within **Shift Templates** in **Employee Settings**. This will allow you to create set shift patterns to reduce time taken to set up new employees and job roles.

4. From the **Week** drop-down menu, select the option that applies.

   This allows you to create alternating shift patterns where applicable – selecting **Week 1** or **Week 2**. If the shift does not alternate, select **No Alternating**.

5. In the **Start Time** field, enter a start time.
6. In the **End Time** field, enter an end time.
7. In the **Hours** field, enter the total hours or click the arrow to auto-calculate, based on the **Start** and **End Time** provided.

   To calculate the number of hours automatically (without any breaks), click the **Calculate** button.

   To specify the number of hours with break times removed, enter the hours in the text box

8. From the **Type** drop-down menu, select **All**, **Term Time** or **Holiday**.

   > **Important**
   >
   > If the employee works less than 52 weeks, this MUST be completed in order to view the entitlement weeks.

9. In the **Days** field, select the days the employee will work.

   Days default to Monday to Friday and are highlighted in pink. Click the days to remove them. When removed these will be greyed out.

10. In the **Active from** field, select the date the shift pattern will begin.

This is a mandatory field.

11. In the **Active to** field, select the date the shift pattern will end.
12. Click the **+ Add Shift** button to save the shift.

HR Admin Customers

Once the **Job Information** has been completed, a number of tasks will be created for the school and your EPM HR Admin Team. Please view our **Guide to EPM Connect Employees Module Tasks**.

Salary Information must now be completed in order for your EPM teams to manage your monthly HR Admin and Payroll processes.

Salary Information

1. The **Effective Date** will be pre-populated. Do not change.
2. Move the **Enforced Calculation** toggle to **YES**.

Important

This is necessary to auto-calculate fields based on the data you have entered.

A number of fields will be auto-calculated once the following fields have been completed:

- Contract Hours
- FTE Hours
- Working Weeks
- FTE Weeks

Basic Pay

Some of the fields are auto populated based on the information you enter.

1. In the **Pay Start Date** field, select a date.
2. From the **Pay Range** field, select a range.

   This is the grade and will define the pay points displayed within the **Pay Scale** field.

3. From the **Pay Scale** field, select a scale.

   This is the pay point. If the point you need is not visible, select a different **Pay Range**.

4. Tick the **Safeguarded Salary** box if relevant.

   Please speak to your EPM Team about any Safeguarded Salaries before a Pay Award is applied.

   Reasons for Safeguarded Salary may include an employee that has rescinded a TLR or due to a restructure has moved down in points and is receiving their previous salary for an agreed period.

5. In the **Protected Weeks** field, enter the number of weeks.

   This will not usually apply. If you think this may apply, please contact your HR Team via the chat.

6. In the **Protected Reason** field, enter the reason.

   This is the reason for the **Protected Weeks**, for example to match a TUPE agreement.

7. From the **Working Pattern Pro Rata Rule** drop-down, select **365 Rule**.

   Select 365 Rule for Teaching Staff. Select **Calendar Days in Period** for Non-Teaching Staff.

8. In the **Working Pattern** field, please enter the contract hours relating to each day.

   Enter the average hours worked on each day. For example, if an employee works alternating shifts on a Monday : Week 1: 6 hours, Week 2: 4 hours, enter 5 hours as the average Monday hours.

9. Tick the **Eligible For Pay Progression** box if relevant.

   This is not a mandatory field.

10. The **Salary** field will be auto populated after a **Pay Range** and **Pay Scale** have been calculated.

    The **Salary** field will only be editable if the **Spot Rate** toggle has been changed to **YES**, otherwise this will be auto calculated.

Leadership Pay

1. Tick the **Leadership Pay** box if relevant.

   This is for reporting purposes.

2. From the **Pay Framework** drop-down menu, select the pay framework.

   This relates to the agreed pay scales and is for reporting purposes.

3. In the **Pay Range Minimum** field, enter a minimum.

   Enter the minimum possible salary for this grade.

4. In the **Pay Range Maximum** field, enter a minimum.

   Enter the minimum possible salary for this grade.

Agency Staff

This section does not need to be completed and will not affect payroll; however, it may be useful to tick the **Agency Staff** box for reporting purposes so that you can choose to exclude agency staff.

Bank Details

1. Complete the employee's bank details.

   Important

   The **Bank Details** should be recorded against the main role held by the employee. Thie is displayed within the **Primary Job Role** field within the **Employment Record** section of the Employee's Record.

This can also be updated by the employee within the **Salary information** section of **My Profile,** in **My Portal** as part of our self-service feature.

Payroll customers: Please ensure you inform your EPM payroll team should you receive a notification that Bank Details have been changed by an employee after the Payroll Cut Off Date.

View Salary History

To view the salary history of the employee related to this job role, click the **View Salary History** button.

This will only be relevant for established employees, not when first adding a new role.

This will display salary changes, displayed in order of **Effective Date** order.

Bold text denotes the employee's current role.

Red text denotes a **Temporary Change**. Blue text denotes a **Temporary Change Reversed**.

Additions and Deductions

Additions and Deductions relating to the employee are displayed within this section.

Important

Deductions cannot be added within this section. These are managed by your EPM team. If you wish to add/amend/delete a deduction, please send a request via the EPM Client Communication Platform.

Current additions should not be deleted as this may result in previous payments made in relation to this addition being reclaimed via payroll.

Amendments to additions should be made via an amendment to the current addition or a by adding a new line.

Add a new addition

1. Click the **+ Add Addition** button.

2. From the **Addition Settings Title** drop down, select the relevant option.

   If the title you require is not available, speak to your EPM Team.

3. From the **Full Time Amount** drop-down menu, enter an amount or click the **Use Default** button to auto-calculate the amount.

4. In the **Payment Start Date** field, select a start date.
5. In the **Payment End Date** field, select a start date.
6. In the **Reason** field, enter a reason.

   Although not mandatory, the Reason field is used to populate content in letters and contracts. If not populated, the document will prompt the user to manually add a reason.

7. Tick the **Is this payment a bonus** box if relevant.
8. Click **Save**.

   The new line will replace the previous addition after the start date.

Pension

This section is non-editable and will be completed by your Payroll & Pensions Team.

Job Documents

This section allows you to view and upload documents to the employee's record in relation to the **Job Role** selected. You are also able to view and upload signable documents.

You can view and upload documents related to a specific role within the **Job Documents** tab within the general **Job Record**.

This section allows you to upload documents and signable documents, which can be shared with the employee and saved within the employee record.

Probation

Probation information can be added against each role held, however this is not a mandatory section.

Tasks

Tasks can be created within the **Tasks** tab of the **Employee Record**. These can be bespoke tasks specific to the employee, or **Task Templates**, set for all starters. Tasks can also be added within the **Task Management** module. The tasks displayed here relate to the specific job role selected. For all general employee tasks refer to **Task Management Summary**.

Step 4: End all roles held by the employee at the original property

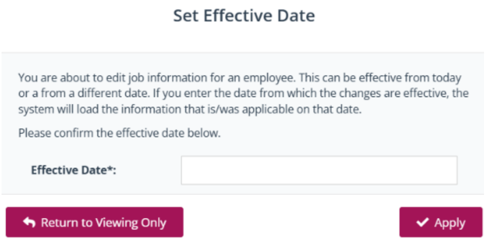
1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Select **All Employees**. The **View Employee Details** page is displayed.

4. Click the eye icon on the right-hand side to open an employee's details, or click on the person's **Forename**. The relevant **Employee Details** page is displayed.
5. Scroll down the page and above the **Job Information** tab, select the relevant job role.
6. Click the **Job Information** tab. The relevant job information is displayed.
7. Click the **Edit Details** button.

8. In the **Set Effective Date** window, enter today's date.

   This window will appear whenever you view **Job Details** or **Salary Details** in **Edit** mode.



9. Click **Apply**.

10. In the **End Date** field, enter the end date of the appointment.
11. In the **Reason for leaving** field, enter the reason the employee is leaving the role.

    Important

    This is needed to update the employee's pension record and the School Workforce Census.

    The leaver cannot be processed without a reason.

12. In the **Final Holiday Balance** field, enter the final balance.

    This field only applies to part-time or full-time non-teaching staff.

13. In the **Paid Leave** field, enter the number of days or hours and select **Hours** or **Days**.

    Paid Leave should be entered for employees who are part-time or full-time non-teaching staff.

    Enter the number of days or hours leave here.

14. Click **Save**. A pop up warning is displayed.

    Adding an end date to a job role or changing it to an earlier date will apply the same date to all its associated additions/deductions.

16. Click **OK** to confirm or **Cancel** to return back to the main screen.

17. Repeat the steps for End Job Role/Appointment for all other roles held by the employee.

Step 5: End employment at the original property (school).

Once all appointments have been ended, you need to end the employee's employment.

This can be managed within the **Employment Record**.

This should not be changed until all appointments have ended.

1. Select **Employment Record** from the tab on the left-hand side of the Employee Record.
2. In the **Employment End Date** field, select the date the employment at the school will end.

    This date should be no earlier than the end date of any of the appointments you have ended.

3. Click **Save**. A pop up warning is displayed.

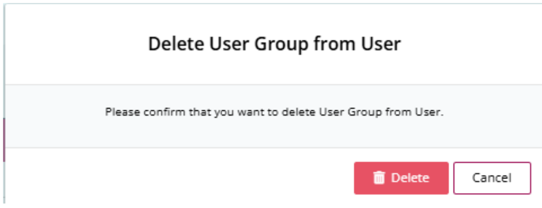
4. Tick the box to confirm that you understand that this action may trigger a P45.
5. Click **OK** to confirm or **Cancel** to return back to the main screen.

Step 6: Delete and update user groups at the original property (school)

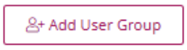
Once the employee's employment has been ended, User Groups should be updated to ensure that users only have access to appropriate permissions.

1. On the left-hand side of the EPM Connect window, click **Admin**. A list of further menu options is displayed.
2. Click **User Administration**. The **User Administration** page displays all current employees.
3. Use the **Search Users** function to find the employee you wish to search for the employee you wish to archive.

4. Click the **pencil** icon in the far right-hand column of the user's name to edit the user permissions. **Edit User** page is displayed.
5. Click the **x** icon next to the permission you want to remove. A pop up window is displayed.



6. Click **Delete**.
7. Repeat the process until all relevant permissions are removed.
8. Click the **+ Add User Group** button.



9. Tick the box next to **Leaver**.

   This will add the user to the Leaver User Group and limits access to **My Payslips** and **My Documents** within **My Portal** only.

10. Click the **+ Add User Group** button.