Salary Statements

EPM Connect Guide



Document Control

Document Overview: This document outlines the step-by-step process for managing Salary Statements within EPM Connect.

Classification: Public

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Last Reviewed by: Keren Prior, Director of Operational Excellence

Date of Next Review: 10th February 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 23rd October 2025 and is issued on a version-controlled basis under her signature.

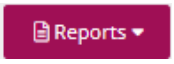
Document History

Date of Change	10th February 2027
Summary of Change	Changes to Salary Statement Process.
New Version Number	v2.0
Changes to be notified to	Director of Operational Excellence

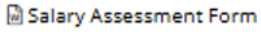
Salary Statements

This function supports in generating salary statements for each employee.

1. On the left-hand side of the EPM Connect window, select **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Click **All Employees**. The **All Employees** page is displayed and displays all current employees.
4. Click the **Reports** button in the top right-hand corner of the screen. A drop-down list of reports is displayed.

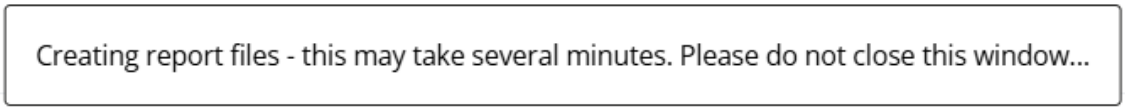


5. Click on the **Salary Assessment Form** report. A **Download Custom Report** window is displayed.



6. In the **Effective Date** field, select a date.
7. From the **Job Categories** drop-down menu, select all the job categories that apply.
8. Click the **Download** button. The report will appear within your downloads.





This may take a few minutes, particularly for larger schools.

9. Go to your Downloads folder.
10. Right click on the zip file named **Combined SAF** and select **Extract All**.
11. A duplicate un-zipped version of the file will appear within your **Downloads** folder.
12. Open the duplicate un-zipped version of the file.

    Each file will be prefixed with the **NI Number** (National Insurance Number) of the related employee. Any files with the prefix **NOT SET** relates to employees within the system that are missing an **NI Number**.

> **Important**
>
> Files with the prefix **NOT SET** must be deleted as they will not be uploaded to the relevant employee file without a NI Number within the prefix.
>
> We therefore recommend opening each file with a **NOT SET** prefix to view the employee it relates to and updating the **NI Number** field within the **Personal Information** tab of each relevant **Employee Record** in the system.
>
> Before deleting each **NOT SET** file, open each file and note down the name so that these employee records can be updated.

13. Delete all files with the prefix **NOT SET** and return to the EPM Connect screen.

14. Select **Distribute Employee Documents** from the left-hand navigation pane,
15. Click the **Select Documents** button.
16. Select the relevant files from your documents and click **Open**.

    These are the files that were created within the earlier step and are denoted by the employee's **NI Number**.

17. From the **Employee Identifier**, select **NI Number**.

    This has match the File Prefix of the documents for the distribution function to work.

18. Tick the **Visible to Employees** box if you wish for the documents to be viewed by your employees.
19. Click **Distribute**.

    The documents will be distributed to the **Employee Record** of each of the relevant employees. Once distributed, we recommend deleting the files from your download.