



People and Money system

We realise this formatting may not be accessible for all – to request this document in an alternative format please email hrhelpline@ed.ac.uk.

PM 3713 - Change of Assignment for Line Managers and SDA

Before you start this process

- You have read the [Guide to Job Changes](#).
- Initiators are familiar with the action reasons for submitting this request, it is important to select the correct Action as this will determine the approval routing needed (see appendices).
- If the change is for a change of hours for an employee with an Annualised or Fractional Contract you must contact HR Operations **before** processing the change by raising an Service Request enquiry. They will calculate the correct hours in relation to the change. Once you have this information you can process the change via the change assignment app. For HR Operations to process the request please provide the following information as per the table below:

	Description	Fractional Contract	Annualised Contract
Weeks Worked	Details of weeks worked up to the date of change		X
Hours Worked	The hours worked up to the date of change	X	
Anniversary Start Date	Employee's contract start date, or date of change if they have had a contractual change e.g. change of hours. If the contract is less than 1 year old then this is the same as the start date however, if the contract is	X	X

	over 1 year old then it will be the most recent anniversary of the original contract start date.		
End Date	Employee's contract end date or the date before the effective change if they have had a contractual change e.g. change of hours.	X	X
Number of Weeks Per Year	Number of weeks the employee is required to work annually or during their contract period, if less than a year.		X
Number of Hours Per Week	This is the number of hours the employee is required to work per week.		X
Hours to be Worked/Scheduled	This is the total number of hours the employee is required/contracted to work annually or during their contract period, if less than a year.	X	

This process begins with the Line Manager or SDA requesting a change of assignment for an employee. The change assignment process should be followed for:

- Extensions to a Fixed Term Contract or Secondment
- Converting an employee to an Open Ended contract
- Changes to contract review date
- Temporary or Permanent Changes to Working hours

This request will follow an approvals process and can be either approved or rejected by approvers.

Line Managers/SDA **should not process** assignment changes for Casual Workers in the Change Assignment fields. This action must be done by HR Operations, please submit a Service request via People and Money.

Flexible working requests should be submitted by completing the [Flexible Working Request Form](#) and attaching this to a Service Request, using the category Flexible Working. They should not be submitted using the Change assignment app. An increase in hours as a revision to a Flexible Working request should still be submitted via Change Assignment.

Approvals

The change assignment process will follow in system approval routing and will route to the finance manager(s) in the first instance and then to the line manager of the employee for whom the change assignment applies. Business Approvals will end with the Level 6 (Head of School or Professional Services Group) or Level 7 (Main Budget Holder/Head of College or Professional Services Group) as per the [Employment Approvals Guidance](#).

Once all Business Approvals have been made the request will reach HR Operations. Once approved, the change will show on the employee record and the requestor will receive a system notification and email to confirm that this is now complete. The change can be seen in the Employment Info App by Line Managers and SDA's.

Please note if an employee Line Manager is not up to date in People and Money, the system will send any approval notifications to the line manager on People and Money, even if they sit in a different department and notifications will route incorrectly up the approval chain.

If the change results in a change of salary costing details you must complete a [Charging of Staff Salary Changes \(Form 13\) Form](#) and submit this to payroll by raising a Service Request>Forms>Salary Costing Change. If costs related to the assignment are to be charged in part or total to cost centre 30010003 (research salary control account) a research salary management labour schedule may need to be created or amended. Please see the 'Guidance Labour Schedule' tab of the Form 13 for further information or liaise with your school research administration team to provide this information if required.

In Brief...

Change of Assignment

Once logged into the system

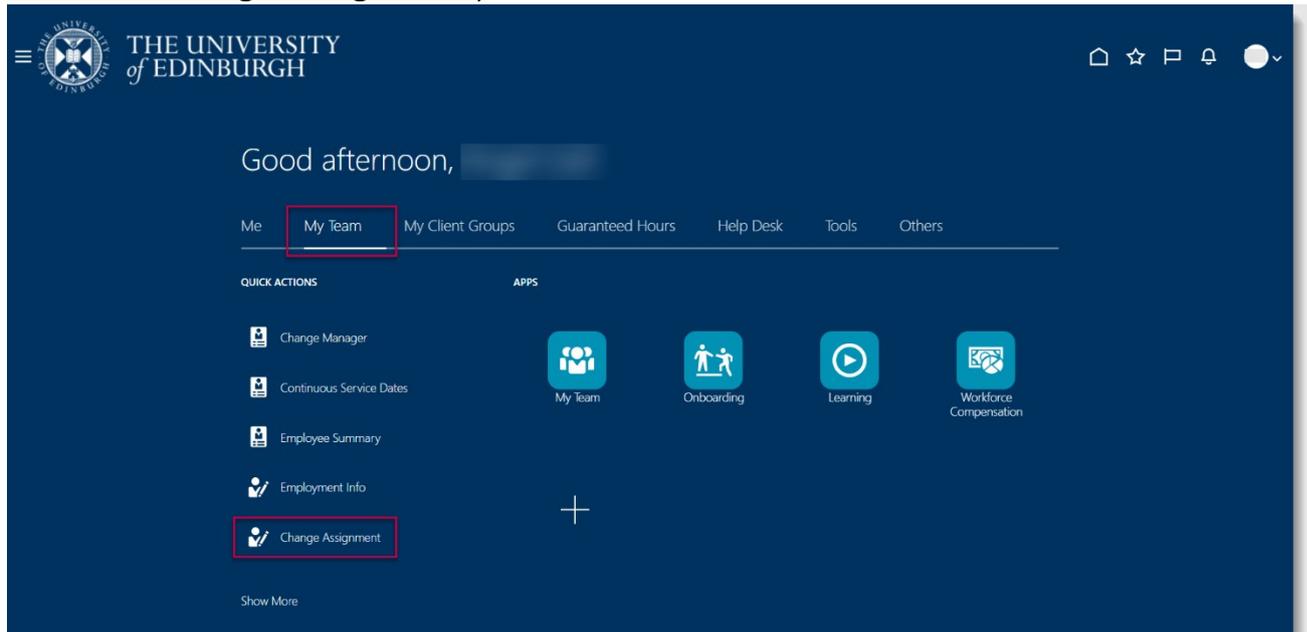
1. Click on **My Team** and **Change Assignment (or My Client Group and Change Assignment for SDA's)**
2. Populate the Search field with Employee name or Employee number.
3. Populate the **When and Why** dialogue box.
4. Populate the **Enter Proposed Changes** dialogue box. **DO NOT** change the 'Weekly' field.
5. Populate **Additional Assignment Info**
6. Populate the **Justification for Change** dialogue box, this should include the work schedule for any change of hours, funding source, change of salary costing details, offline approvals as required.
7. **Attach** relevant documents e.g. confirmation of offline approvals, funding extensions. If a Tier 4/Student visa holder please provide EUCLID and Term Dates screen shots.
8. Select **Submit**.
9. Review via **Notifications**.
10. Select **Created by me**
11. Withdraw a Submission

In Detail...

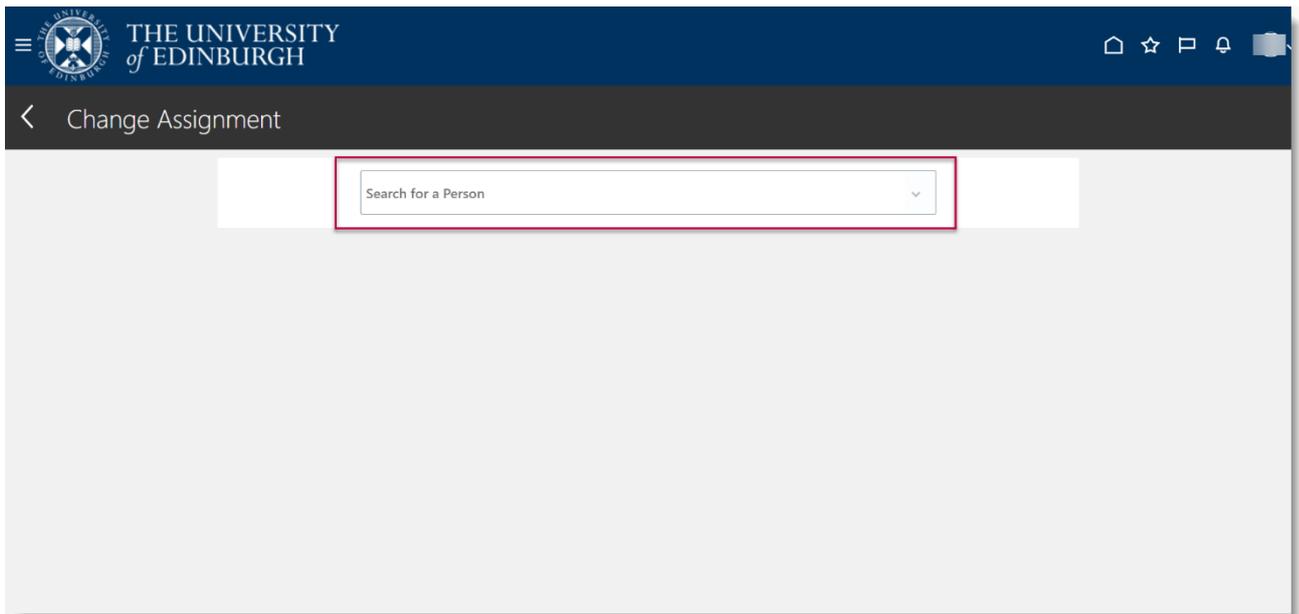
Assignment Changes

Once logged into the system

1. Select **My Team** and **Change Assignment** (or if an SDA **My Client Groups, Show More** and **Change Assignment**.)

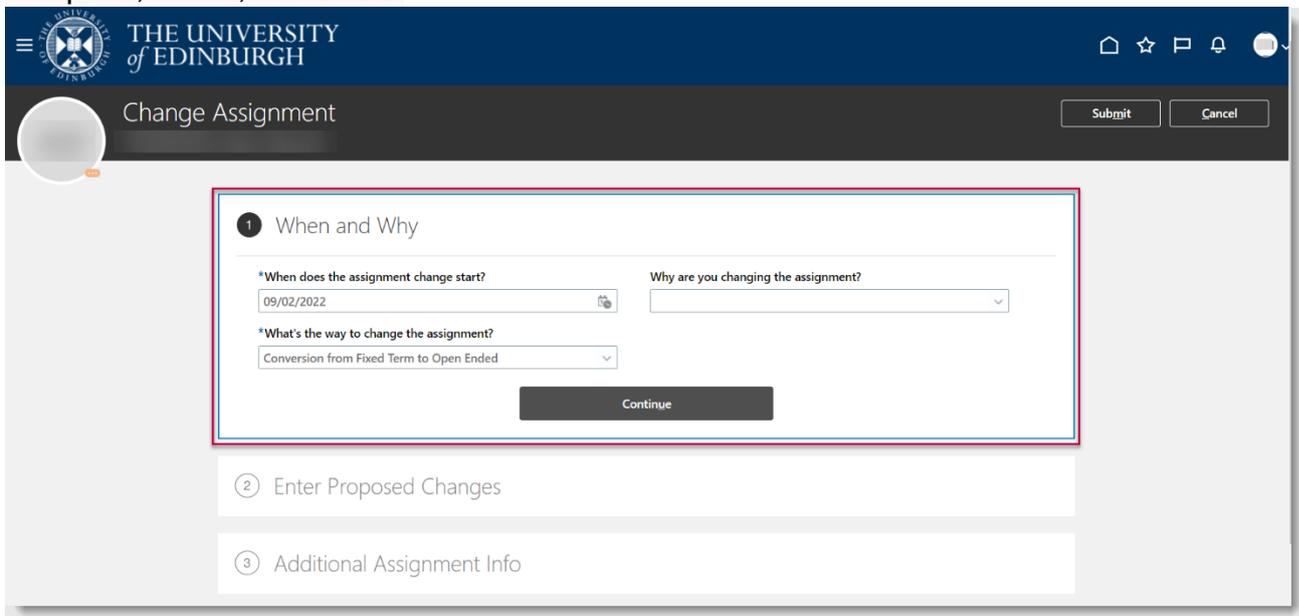


2. Populate the search field with employee number or name (if the employee holds multiple assignments you should use the advanced search to locate the correct record to update). Usually, the Line Manager would have a selectable list of employees (direct reports) shown below in this search box. This has not been shown in the example.



3. The Change Assignment screen presents 3 sections; When and Why, Enter Proposed Changes and Justification for change. In certain cases an additional section will appear 'Additional Assignment Information'.

Populate the date in, **When Does the Assignment Change Start**, then in the dropdown, **What's the Way to Change the Assignment**, and the dropdown, **Why are you Changing the Assignment?** Note the starred fields are mandatory. When complete, select, **Continue**.



When does the assignment change start (Effective Date of the change)

Non-Payroll Impacting Changes - SDA/Line Managers should use the **current date** as the effective date of the change, e.g. extension to FTC, extension to secondment end date, conversion from FTC to open ended contract.

Payroll Impacting - If the change is payroll impacting (any change that includes an increase/decrease in hours), SDA/Line Manager should use the **actual date** that the change takes place to ensure that the employee receives the correct payment.

There are 24 items in the dropdown box '**What's the Way to Change the Assignment**', see appendices for full list. It is important that you select the **correct action**. We will continue with the example of Extension of a Fixed term Contract.

Select **Continue**.

The screenshot shows the 'Change Assignment' form in the University of Edinburgh system. The form is titled '1 When and Why' and contains several fields. A red box highlights the 'What's the way to change the assignment?' dropdown menu, which is open to show a list of actions. The first action, 'Conversion from Fixed Term to Open Ended', is selected and highlighted in blue. Other actions include 'Conversion from Fixed Term to Open Ended with a Change in Hours', 'Decrease in Working Hours (Any Funding)', 'Extend Contract Review Date > 6 Months with an Increase in Hrs > 10 Hours pw', and 'Extend Contract Review Date <= 6 Months with an Increase in Hrs <= 10 Hours pw'. The form also includes a date field for 'When does the assignment change start?' (09/02/2022) and a dropdown for 'Why are you changing the assignment?'.

4. Enter **Proposed Changes**

The dialogue box will open. Again note that the starred fields are mandatory. Populate (in this example) Projected End Date, Working Hours (if an hours change is required, **do not change the Weekly field**), Reason Code.

Important to Note

- **The fields the user will see depend on the choices made in the previous section.**
- **The projected end date** field pre-populates the current/existing end date in the case of FTC; secondment and review date extensions. It is important that you review and update this where applicable. If the change is a conversion from a Fixed Term Contract to Open Ended Contract the projected end date should be removed, you may need to enter a contract review date if applicable

When complete, select **Continue**.

The screenshot shows the 'Change Assignment' form with three steps. Step 1 is 'When and Why'. Step 2, 'Enter Proposed Changes', is highlighted with a red border and contains the following fields: 'Projected End Date' (01/08/2022), 'Fixed Term Reason Code' (Funding for the post is restricted), '*Assignment Category' (Open Ended), and 'Contract Review Date' (01/07/2022). A 'Continue' button is at the bottom of this section. Step 3 is 'Additional Assignment Info'.

5. Enter **Additional Assignment Info (Annualised & Fractional Information)**.

In the example the screen is shown for employees on an Annualised/Fractional contract. **Populating this dialogue box is only necessary in these circumstances.** Note the points in before you start section. Select **Add** to display the fields. (Please note this will only be displayed for when there is an action selected relating to a change of hours).

The screenshot shows the 'Change Assignment' form with three steps. Step 1 is 'When and Why'. Step 2 is 'Enter Proposed Changes'. Step 3, 'Additional Assignment Info', is highlighted with a blue border and contains an 'Info Group' dropdown menu set to 'Annualised/Fractional information'. Below the dropdown is a '+ Add' button, highlighted with a red border. Below the button is a message: 'There's nothing here so far.' with a small icon of a person. A 'Continue' button is at the bottom of this section.

The table below highlights the fields required to be completed by a Line Manager/SDA. All Other fields will be completed by HR Operations.

Title of Field	Description	Fractional Contract	Annualised Contract
Anniversary Start Date	Employee's contract start date, or date of change if they have had a contractual change e.g. change of hours. If the contract is less than 1 year old then this is the same as the start date however, if the contract is over 1 year old then it will be the most recent anniversary of the original contract start date.	X	X
End Date	Employee's contract end date or the date before the effective change if they have had a contractual change e.g. change of hours.	X	X
Number of Weeks Per Year	Number of weeks the employee is required to work annually or during their contract period, if less than a year.		X
Number of Hours Per Week	This is the number of hours the employee is required to work per week.		X

Hours to be Worked/Scheduled	This is the total number of hours the employee is required/contracted to work annually or during their contract period, if less than a year.	X	
------------------------------	--	---	--

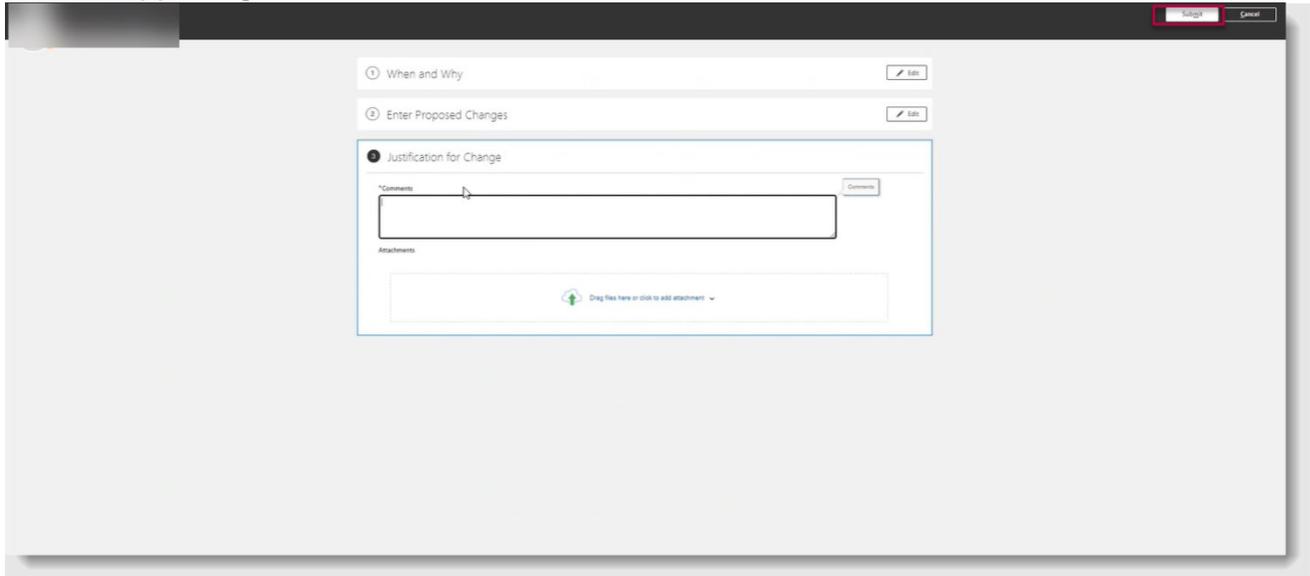
6. Enter **Justification for Change**

This section is particularly important. You should use this box to provide supporting information an approver will need or that HR Operations will need to approve the change namely:

- For any increase or decrease to working hours, **the revised work schedule is provided in the Justification for Change section.** HR Operations will not be able to approve the change unless this is provided. You can use the [work schedule calculator](#) to generate the work schedule. **If no change is required you should note this also.**
- Temporary Changes – if the reason for change is temporary you **must provide the end date of the change**, HR Operations will update this upon receipt of the approval notification.
- Any **Changes to Funding Source, Salary Costing Changes** or offline approvals should be noted for the finance approver (N.B Salary Costing Changes must also be submitted via Service request on the [Charging of Staff Salaries Form 13](#)).
- For **Annualised/Fractional contract changes** please provide the SR number relating to the calculation of hours (provided at the start of the process).
- **Attachments** - Supporting documents (optional) can be attached to support the change, for example confirmation of offline approvals and funding extensions. If a Tier 4/Student visa holder please provide EUCLID and Term Dates screen shots.

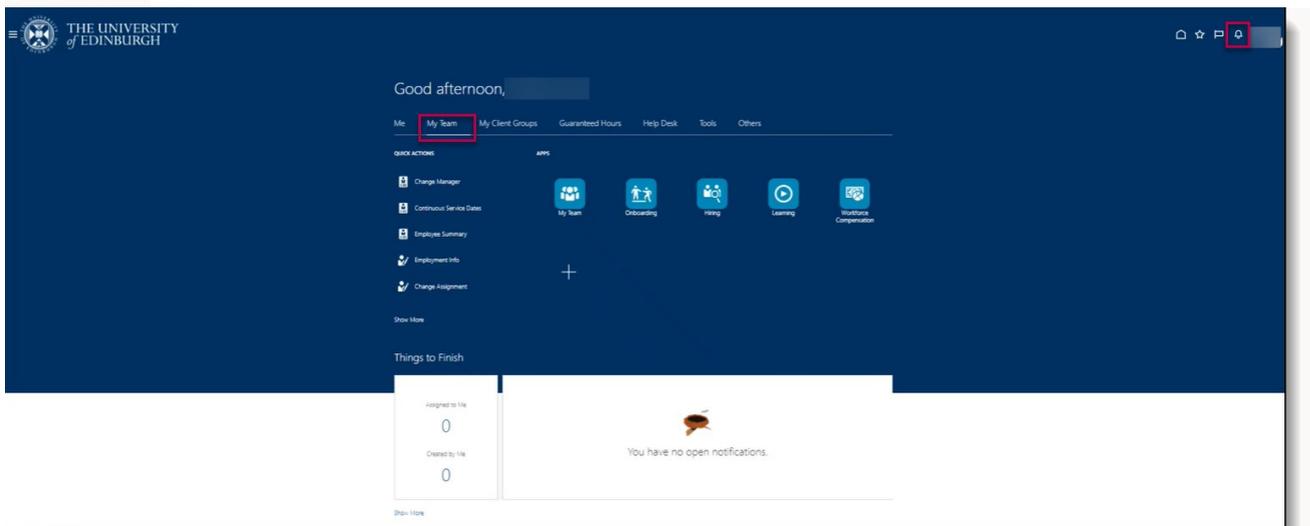
The screenshot shows a web interface for 'Additional Assignment Info'. At the top right of this section is an 'Edit' button. Below it is a sub-section titled 'Justification for Change'. This sub-section contains a text input field labeled '*Comments' and an 'Attachments' section. The attachments section features a dashed rectangular box with a green upload icon and the text 'Drag files here or click to add attachment'.

7. Attach supporting documents.



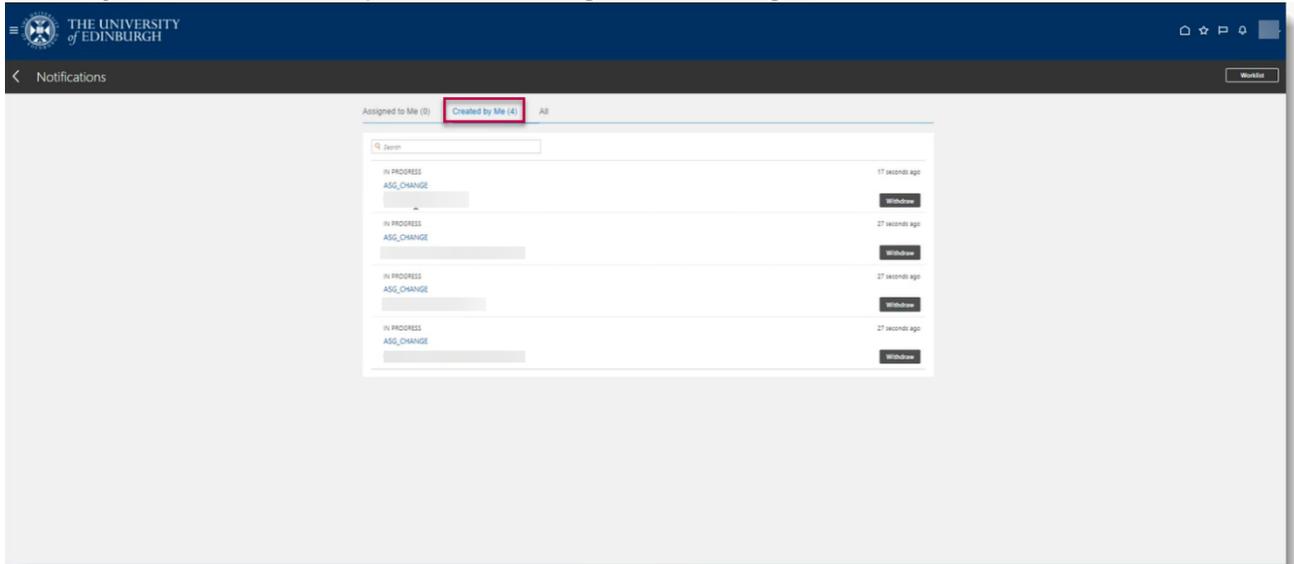
8. Select **Submit**.

9. Reviewing your actions. The request will go to approval, however the user may wish to review this change request. This will display in notifications. To view this the user should return to their desktop workspace. Select the bell icon, then **Show All**.

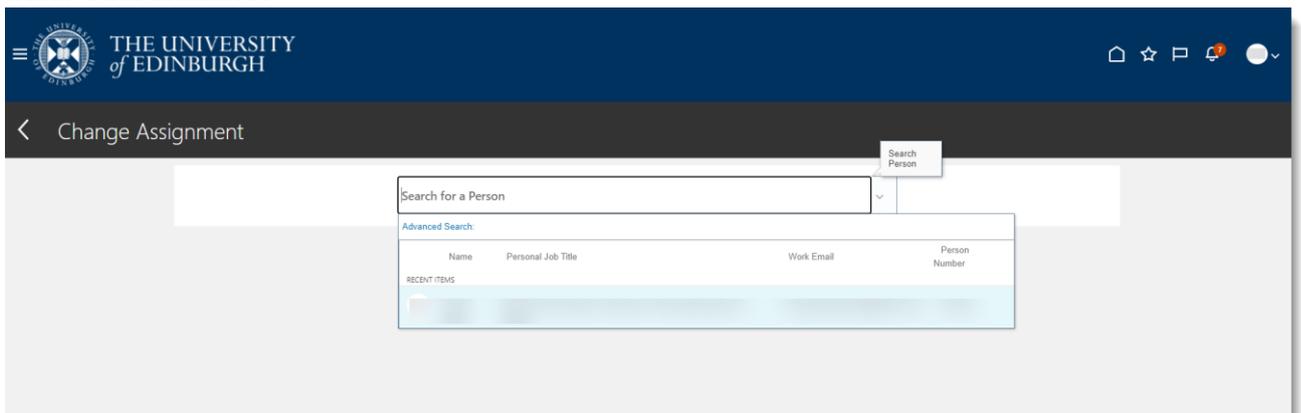


10. Select **Created by Me**. User should note the blue highlighted text on the notification. Select this to see an expanded view of the notification, this will also show the approval chain for the change, should the user wish to contact any approver – perhaps due to

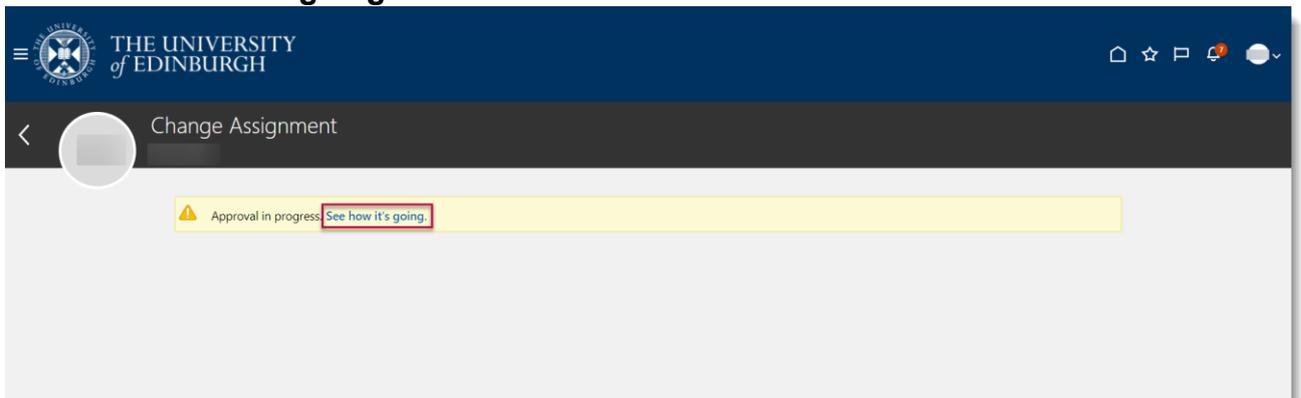
their rejection of some aspect of the assignment change.



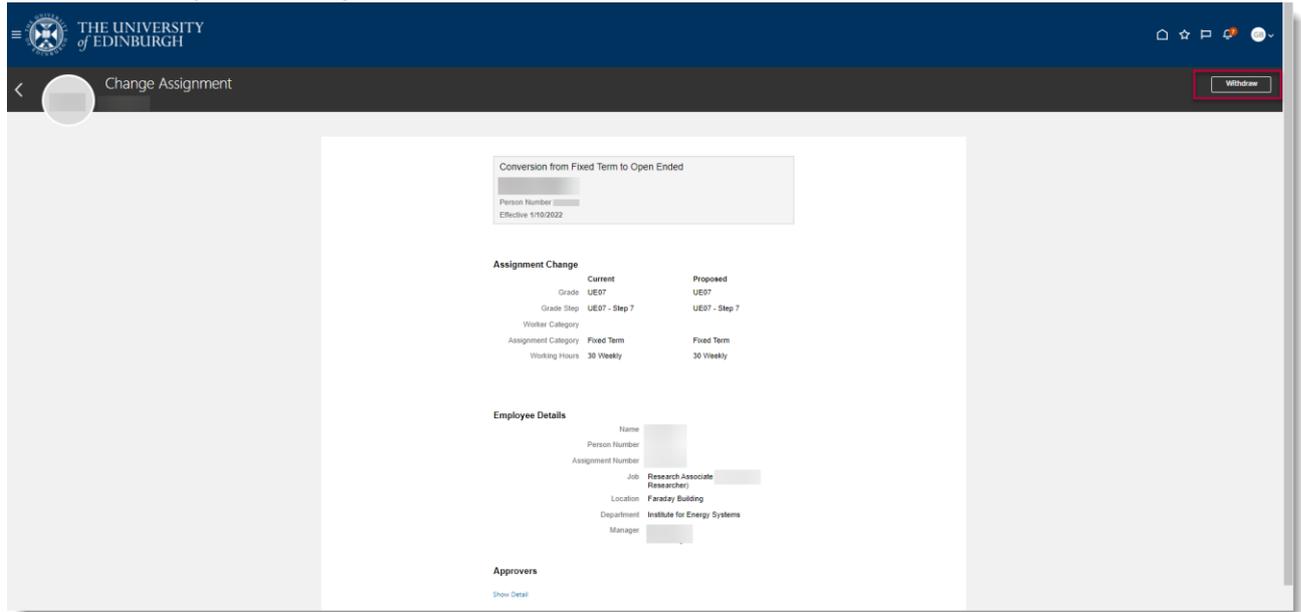
11. Withdrawing a Submission. Only the initiator can withdraw a request submitted via the change assignment app, as above. In **Change Assignment**, enter name in the search field. Select name.



Select **See how it's going**.

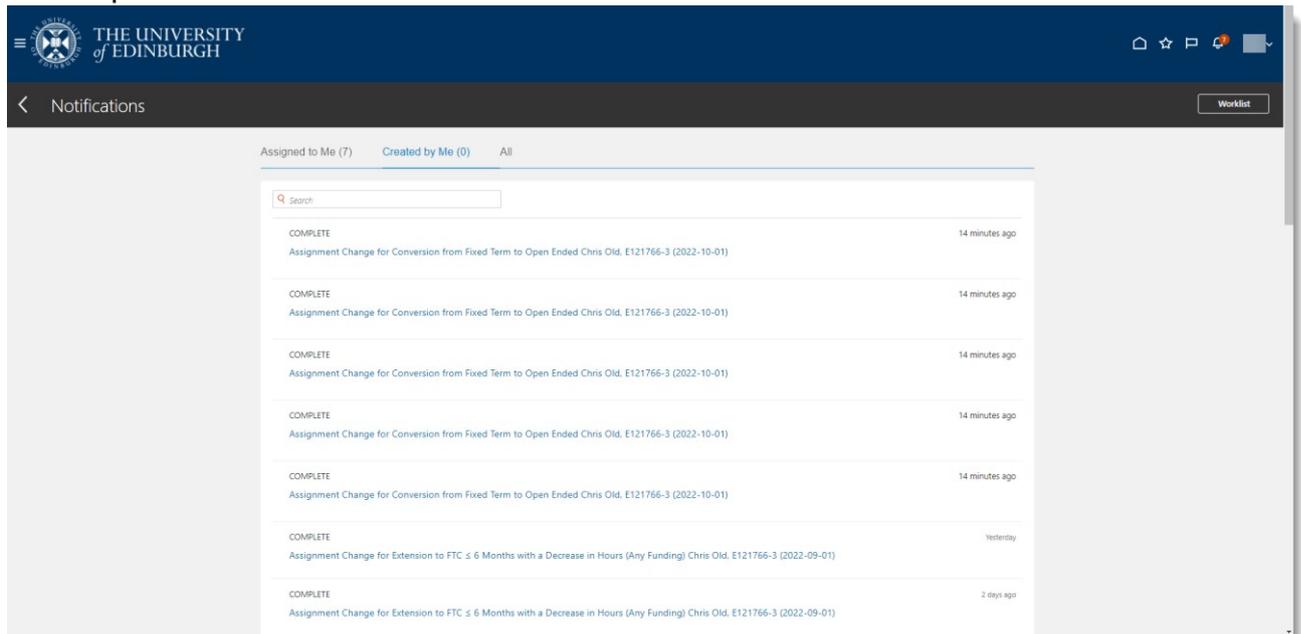


The initial request will open.



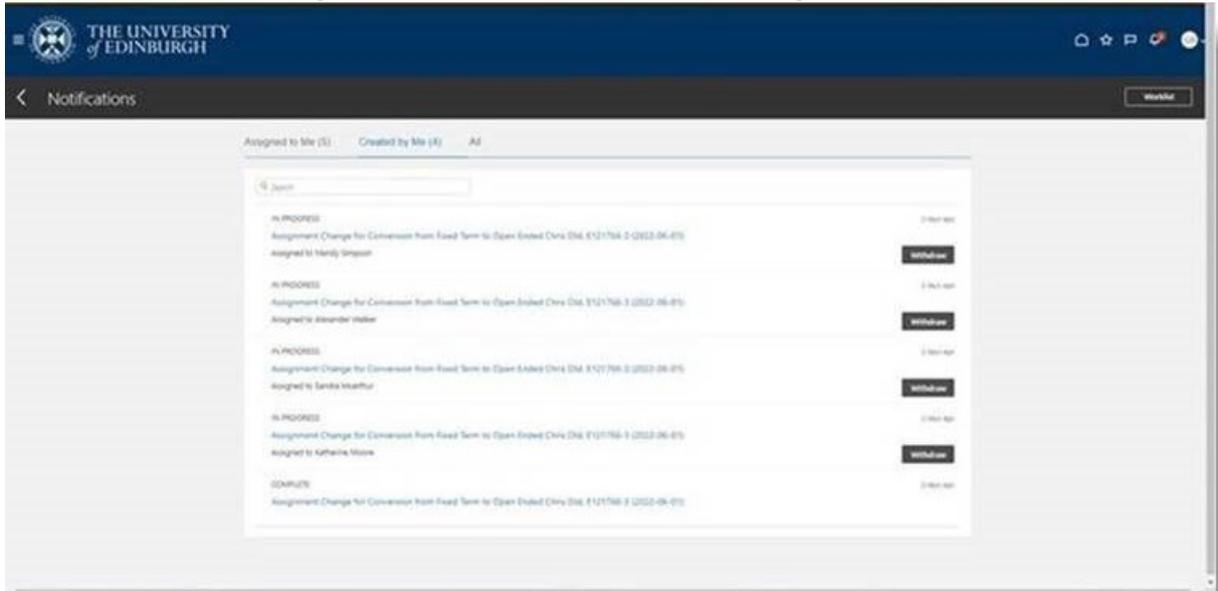
Click on the **Withdraw** button on the top right

This will automatically delete the notification for all the finance managers and will mark it as complete for the initiator in their notifications list.



Important - Withdrawing a notification from the notifications list (screenshot of notifications list below) will **NOT** delete the original request. It will only delete the

notification, **it is best practice to follow the above steps.**



If a notification is withdrawn from the list in the screenshot above, and that is not done for **everyone** who the notification was sent to, the remaining approvers who can **see** the notification will still be able to access it and approve it, and it will go up the approval hierarchy as normal even though it will show that it was withdrawn by the initiator at an

earlier stage:

Assigned to [redacted]	
✓ Approved by [redacted]	14/03/2022 8.00.PM
✓ Approved by [redacted]	14/03/2022 7.52.PM
✓ Approved by [redacted]	14/03/2022 7.50.PM
✓ Approved by [redacted]	14/03/2022 7.48.PM
✓ Approved by [redacted]	14/03/2022 7.44.PM
✓ Approved by [redacted]	14/03/2022 7.42.PM
✓ Approved by [redacted]	14/03/2022 7.40.PM
✓ Approved by [redacted]	14/03/2022 7.38.PM
✓ Approved by [redacted]	14/03/2022 7.19.PM
✓ Approved by [redacted]	14/03/2022 7.06.PM
Withdrawn by [redacted]	14/03/2022 7.02.PM
Submitted by [redacted]	

Work schedule: Monday to Thursday, 7.5 hours each day.

Appendices

Reason for Change (searchable from drop down menu)	Why (select from drop down)	Business Approval Level Required	Effective Date to use
Extension to FTC for 6 Months or Less (Any Funding)	Additional Funding Available	Head of School (Level 6)/DoPs (Level 5)/Director of PSG (6)	Current Date
	Cover for Absence		
Extension to FTC for More Than 6 Months (Internally Funded)	Additional Funding Available	Main Budget Holder (Level 7)	Current Date
	Cover for Absence		
Extension to FTC for More Than 6 Months (Externally Funded)	Additional Funding Available	Head of School (Level 6)/DoPs (Level 5)/Director of PSG (6)	Current Date
	Cover for Absence		
Extension to FTC ≤ 6 Months with an Increase in Hrs > 10 Hours pw (Int. Funded)	Additional Funding Available	Main Budget Holder (Level 7)	Date that the hours change takes effect
	Cover for Absence		
Extension to FTC ≤ 6 Months with an Increase in Hrs ≤ 10 Hours pw (Int. Funded)	Additional Funding Available	Head of School (Level 6)/DoPs (Level 5)/Director of PSG (6)	Date that the hours change takes effect
	Cover for Absence		
Extension to FTC ≤ 6 Months with a Decrease in Hours (Any Funding)	Additional Funding Available	Head of School (Level 6)/DoPs (Level 5)/Director of PSG (6)	Date that the hours change takes effect
	Cover for Absence		
Extension to FTC > 6 Months with a Change in Hours (Internally Funded)	Additional Funding Available	Main Budget Holder (Level 7)	Date that the hours change takes effect
	Cover for Absence		

Extension to FTC > 6 Months with a Change in Hours (Externally Funded)	Additional Funding Available	Head of School (Level 6)/DoPs (Level 5)/Director of PSG (6)	Date that the hours change takes effect
	Cover for Absence		
Extension to Contract Review Date on Open-Ended Contract	Additional Funding Available	Head of School (Level 6)/DoPs (Level 5)/Director of PSG (6)	Current Date
Extend Contract Review Date > 6 Months with an Increase in Hrs > 10 Hours pw	Additional Funding Available	Main Budget Holder (Level 7)	Date that the hours change takes effect
Extend Contract Review Date ≤ 6 Months with an Increase in Hrs ≤ 10 Hours pw	Additional Funding Available	Head of School (Level 6)/DoPs (Level 5)/Director of PSG (6)	Date that the hours change takes effect
Extension to Contract Review Date with a Decrease in Hours	Change in Funding Available	Head of School (Level 6)/DoPs (Level 5)/Director of PSG (6)	Date that the hours change takes effect
Extension to Secondment End Date (Internally Funded)	Additional Funding Available	Main Budget Holder (Level 7)	Current Date
	Absence of Substantive Post Holder Extended		
Extension to Secondment End Date (Externally Funded)	Additional Funding Available	Head of School (Level 6)/DoPs (Level 5)/Director of PSG (6)	Current Date
	Absence of Substantive Post Holder Extended		
	Additional Funding Available	Main Budget Holder (Level 7)	

Extension to Secondment with a Change in Hours (Internally Funded)	Absence of Substantive Post Holder Extended		Date that the hours change takes effect
Extend Secondment & Increase in Hours > 6 Months or > 10 Hours pw (Ext. Funded)	Additional Funding Available	Main Budget Holder (Level 7)	Date that the hours change takes effect
	Absence of Substantive Post Holder Extended		
Extend Secondment & Increase in Hours ≤ 6 Months or ≤ 10 Hours pw (Ext. Funded)	Additional Funding Available	Head of School (Level 6)/DoPs (Level 5)/Director of PSG (6)	Date that the hours change takes effect
	Absence of Substantive Post Holder Extended		
Extend Secondment & Decrease Hours (Externally Funded)	Reduction in Funding Available	Head of School (Level 6)/DoPs (Level 5)/Director of PSG (6)	Date that the hours change takes effect
	Absence of Substantive Post Holder Extended		
Conversion from Fixed Term to Open Ended	Additional Funding Available	Main Budget Holder (Level 7)	Current Date
	Chancellors Fellowship - Following Review		
	Over 4 Years Continuous Service		
	Fixed Term Post-Holder Appointed Permanently		
Conversion from Fixed Term to Open Ended with a Change in Hours	Additional Funding Available	Main Budget Holder (Level 7)	Current Date
	Chancellors Fellowship - Following Review		

	Over 4 Years Continuous Service		
	Fixed Term Post-Holder Appointed Permanently		
	Reduction in Funding Available		
Increase in Hours for > 6 Months or > 10 Hours per week (Internally Funded)	Additional Funding Available	Main Budget Holder (Level 7)	Date that the hours change takes effect
Increase in Hours for ≤ 6 Months or ≤ 10 Hours per week (Internally Funded)	Manager Approved	Head of School (Level 6)/DoPs (Level 5)/Director of PSG (6)	Date that the hours change takes effect
Increase in Working Hours (Externally Funded)	Seconded Externally (Part-Time)	Head of School (Level 6)/DoPs (Level 5)/Director of PSG (6)	Date that the hours change takes effect
	Seconded Internally (Part-Time)		
	Cover for Absence		
Decrease in Working Hours (Any Funding)	Reduction in Funding Available	Head of School (Level 6)/DoPs (Level 5)/Director of PSG (6)	Date that the hours change takes effect
	Seconded Externally (Part-Time)		
	Seconded Internally (Part-Time)		
	Manager Approved		

Secondment	DO NOT USE – follow the guidance within the Guide to Recruitment & Onboarding		
------------	---	--	--