



People and Money system

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School/Department Admin Guide - How to Add a Pending Worker

School/Department Admin

Estimated time to complete: 15 minutes

Before you start

Please familiarise yourself with the [Guide to Recruitment and Onboarding](#).

The Job Requisition Business Case form should be attached to provide evidence of budgetary approval.

The [Appointee Information Form](#) should be completed by the new hire before you start this process.

Once the pending worker record has been approved the Onboarding Journey 'Welcome to the University of Edinburgh' (for new hires) or 'Rejoining the University of Edinburgh' (for rehires) will be **automatically** assigned. Further information regarding Journeys can be found in the [Line Manager or SDA Guide to Journeys](#).

If the pending worker hire needs to be cancelled, an SR will need to be raised for HR Ops to cancel the work relationship. Please **do not** terminate the pending worker record.

Right to work and other sensitive documents should not be attached to the pending worker transaction. These are submitted through Onboarding Journey tasks at a later stage.

Allowances (if applicable) must be added to the Compensation section. If the allowance you need is not listed, please add this to the comments section.

If the person you are hiring has an active casual worker assignment you must contact HR Operations to have the termination date brought forward by raising a service request, including the hire date. Please review the details in the [Guide to Casual Workers](#) (Under Recruitment & Onboarding heading)

The **Default Expense Account Code** must be added for all pending workers. This enables users to submit any future expense claims. This will be captured within the approved Job Requisition Business Case Form.

In Brief...

Add a Pending Worker

1. From the **Home** page click **My Client Groups**, and select **Show More** under Quick Actions

2. Select **Add a Pending Worker**



3. **Check the boxes** against all the info you would like to manage and then press **Continue**



4. Complete the **When and Why** section and click **Continue**



5. Complete the **Person Details** section including the **Preferred Name** and **National Insurance Number** (if known) and click **Continue**



6. If a duplicate record is found, check the Person Type and Termination Date, following the steps on page 8 and 9 below. If no duplicate found, continue to step 7

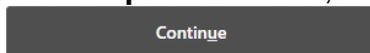
7. Complete the **Communication Info** section. A personal email address must be entered in both the personal email address and work email address field. Click **Continue**



8. Add **Address** details.

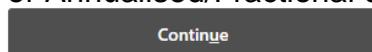
9. Complete the **citizenship info** section, adding the nationality of the candidate.

10. Click **Continue** within the **Family and Emergency Contacts** section as the employee can complete these details themselves at the preboarding stage.

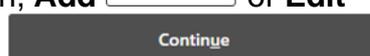


11. In the **Employment Details** section complete the mandatory fields (detailed below), add the **Personal Job Title**, fill in all other relevant information as required for the contract. For fixed term workers only, ensure the **Projected End Date** is completed. Please include the **default expense account code** details. Click **Continue**

12. In the **Additional Assignment Info** section, select the dropdown and add Guaranteed Hours or Annualised/Fractional contract information as required, then click **Continue**



13. In the **Maintain Managers** section, **Add** or **Edit** the line manager of the new hire as needed, then select **Continue**

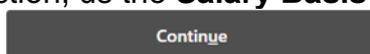


14. In the **Payroll Details** section, select UoE Group in the **Payroll Frequency** section then select **University of Edinburgh** as the **Tax Reporting Unit**. Then

select **Continue**

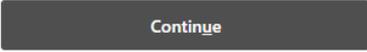
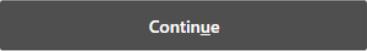
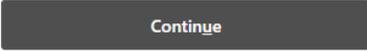
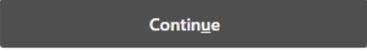
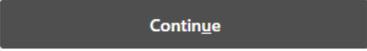
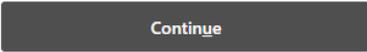
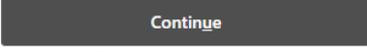


15. In the **Salary** section, use the **Salary Basis** dropdown to select **Annual Salary** then select **Continue**



- Complete the **Compensation section** should any allowances be required and click **Continue** 
- Add any comments and upload the completed Job Requisition Business Case form to the **Comments and Attachments** section then click **Submit** 

Rehire a previous employee

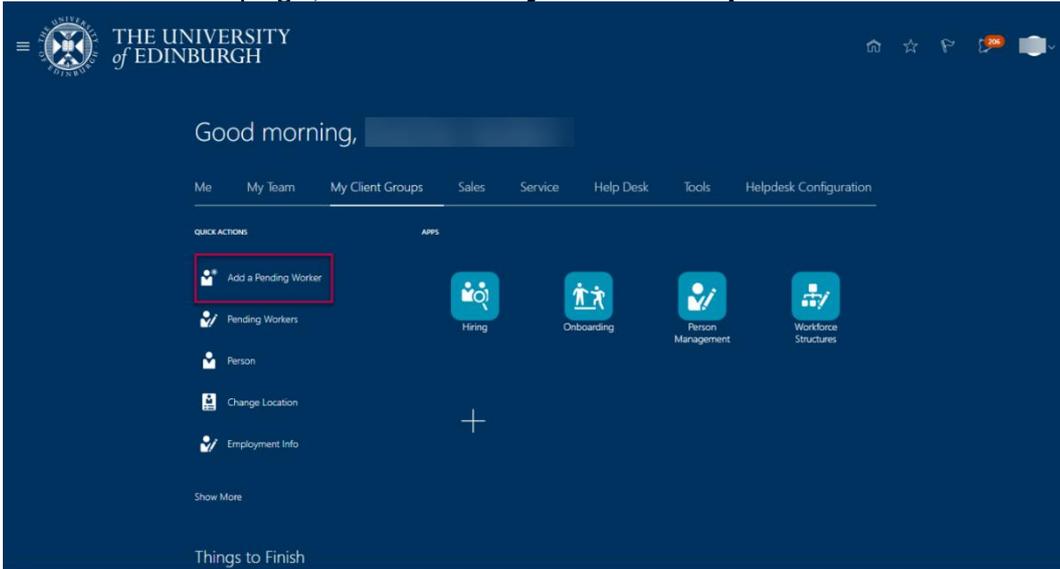
- Select the previous worker record and click **Continue** 
- Click **Ok** 
- Check the boxes** against all the info you would like to manage and then press **Continue** 
- Complete the **When and Why** section and click **Continue** 
- Confirm the **personal details** are correct then click **Continue** 
- Add or amend **Communication Info** as required then click **Continue** 
- Add or amend **Address** details as required then click **Continue** 
- Add or amend **Citizenship Info** as required then click **Continue** 
- In the **Employment Details** section complete the mandatory fields (detailed below), add the **Personal Job Title**, fill in all other relevant information as required for the contract. For fixed term workers only, ensure the **Projected End Date** is completed. Please include the **default expense account code** details. Click **Continue**
- In the **Additional Assignment Info** section, select the dropdown and add Guaranteed Hours or Annualised/Fractional contract information as required, then click **Continue** 
- In the **Maintain Managers** section, **Add**  or **Edit**  the line manager of the new hire as needed, then select **Continue** 
- Click **Continue**  in the Work Relationship Info section
- In the **Payroll Details** section, select UoE Group in the **Payroll Frequency** section then select **University of Edinburgh** as the **Tax Reporting Unit**. then select **Continue** 
- In the **Salary** section, use the **Salary Basis** dropdown to select Annual Salary then select **Continue** 
- Complete the Compensation section should any allowances be required and select **Continue** 
- If required, **Add Direct Reports** by searching and selecting existing employees to report into the new hire then select **Continue** 

17. Add any comments and upload the completed Job Requisition Business Case form and New Appointee Information Form to the **Comments and Attachments** section then click **Submit**

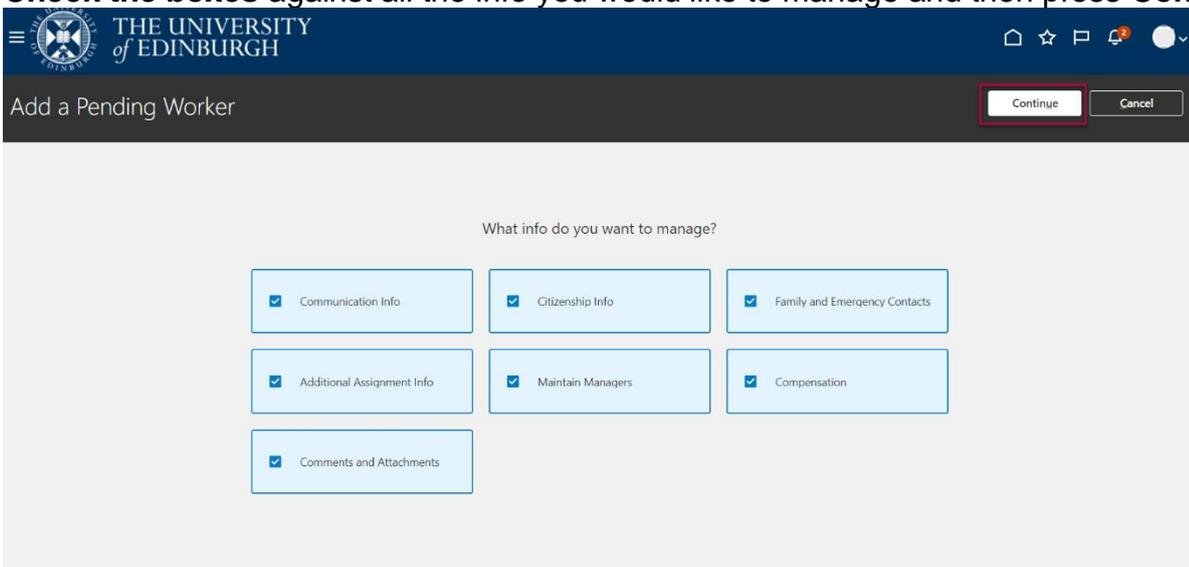
In Detail...

Add Pending Worker

1. From the **Home** page, click on the **My Client Groups** and select **Add a Pending Worker**.



2. **Check the boxes** against all the info you would like to manage and then press **Continue**.



3. In the **When and Why** section,
- Enter the **Pending worker start date**

- b. Select the relevant **Legal Employer**
- c. Select the relevant **Proposed Worker Type**
- d. **Make sure the Action under ‘What’s the way to add the pending worker’ states ‘Add Pending Worker’**
- e. Select the Action Reason **‘Future hire to fill vacant position’** in the ‘Why are you adding a pending worker section
- f. Then press **Continue**.

The screenshot shows the 'Add a Pending Worker' form at The University of Edinburgh. The header includes the university logo and navigation icons. The form title is 'Add a Pending Worker' with 'Submit' and 'Cancel' buttons. The main content area is titled '1 When and Why' and contains several dropdown menus:

- 'When is the pending worker start date?' with the value '01/03/2022'.
- 'Legal Employer' with the value 'University of Edinburgh'.
- 'Proposed Worker Type' with the value 'Employee'.
- 'What's the way to add the pending worker?' with the value 'Add Pending Worker'.
- 'Why are you adding a pending worker?' with the value 'Future hire to fill vacant position'.

 A 'Continue' button is located at the bottom of this section and is highlighted with a red rectangular box. Below this section, a '2 Personal Details' section is partially visible.

The screenshot shows the 'Add a Pending Worker' form at The University of Edinburgh, specifically the '2 Personal Details' section. The header includes the university logo and navigation icons. The form title is 'Add a Pending Worker' with 'Submit' and 'Cancel' buttons. The main content area is titled '2 Personal Details' and contains numerous input fields:

- 'Person Number' (Generated automatically).
- 'Last Name' (text input).
- 'Middle Name' (text input).
- 'Title' (dropdown menu with 'Select a value').
- 'Preferred Name' (text input).
- 'First Name' (text input).
- 'Date of Birth' (text input with format 'dd/mm/yyyy').
- 'Student Number' (text input).
- 'HESA Disability 1' (dropdown menu).
- 'HESA disability 2' (dropdown menu).
- 'HESA previous institution' (dropdown menu).
- 'STSS/GTC number' (text input).
- 'REF Unit of Assessment' (dropdown menu).
- 'HESA Staff Identifier' (text input).
- 'HESA Highest Qualification' (dropdown menu).
- 'UOE_UUN' (text input).
- 'HESA previous employment' (dropdown menu).

4. In the **Personal Details** section, enter just the information in the mandatory fields plus the worker **Title** and **Preferred Name**. Please avoid using special characters where ever possible

The new hire will be asked to complete other personal information at the pre boarding stage.

Note:

- a. If the preferred name has not been provided, **please enter their first name**. Preferred name is used in People and Money, not first name. So omitting this will impact correspondence and how their name appears in the directory (which only shows preferred name).

b. The following fields **must not** be completed:

- Student Number
- UOE_MORAY_HOUSE_TERMS
- STSS/GTC number
- HESA Staff Identifier
- UOE_UUN
- HESA Disability 1
- HESA Disability 2, 3, 4
- HESA previous institution
- REF Unit of Assessment
- HESA Highest Qualification
- HESA previous employment
- Visitor Registration Number (Finance Use Only)

5. Click the **Add** button in the National Identifiers section, enter the **National Insurance Number** (if known), and then click **Continue**.

The screenshot shows a web form titled "Add a Pending Worker" with "Submit" and "Cancel" buttons in the top right. The form is divided into several sections:

- Date of Birth:** A text input field with a date format mask "dd/mm/yyyy" and a calendar icon.
- Student Number:** A text input field.
- UOE_MORAY_HOUSE_TERMS:** A dropdown menu.
- STSS/GTC number:** A text input field.
- HESA Staff Identifier:** A text input field.
- UOE_UUN:** A text input field.
- HESA Disability 1:** A dropdown menu.
- HESA Disability 2:** A dropdown menu.
- HESA previous institution:** A dropdown menu.
- REF Unit of Assessment:** A dropdown menu.
- HESA Highest Qualification:** A dropdown menu.
- HESA previous employment:** A dropdown menu.
- National Identifiers:** A section containing:
 - Country:** A dropdown menu with "United Kingdom" selected.
 - National ID Type:** A dropdown menu with "Select a value" selected.
 - + Add:** A button highlighted with a red box.

At the bottom of the form is a "Continue" button. Below the form is a breadcrumb trail showing "3 Communication Info".

Add a Pending Worker

STSS/GTC number: [] REF Unit of Assessment: []

HESA Staff Identifier: [] HESA Highest Qualification: []

UOE_UUN: [] HESA previous employment: []

National Identifiers + Add

*Country: United Kingdom Issue Date: dd/mm/yyyy

*National ID Type: National Insurance Number Expiration Date: dd/mm/yyyy

*National ID: MS763645 Place of Issue: []

Primary

Continue

3 Communication Info

The duplicate worker check runs against the National Insurance Number. If you receive a message regarding Potential Matches see the steps below.

Checks you must carry out

At the point of the duplicate check, you may receive a warning message ‘The person has an active assignment of this type with the legal employer’, this means they are currently active on payroll. You must check the person type:

Add a Pending Worker

Warning: If one of these people is the person you're adding, select the person. Else select no match. (PER-1332260)

Potential Matches

No match, add person

Person Name: James Brown
 Legal Employer: University of Edinburgh
 Person Type: Employee Casual
 Business Unit: University of Edinburgh
 Department: Academic and Student Administration - CAHS
 Assignment Number: E259419
 Start Date: 8/03/2022

Error

The selected person has an active assignment of this type with this legal employer.

OK Cancel

Continue

Add a Pending Worker

Warning: If one of these people is the person you're adding, select the person. Else select no match. (PER-1332260)

Potential Matches

No match, add person

Person Name: James Brown
 Legal Employer: University of Edinburgh
 Person Type: Employee Casual
 Business Unit: University of Edinburgh
 Department: Academic and Student Administration - CAHS
 Assignment Number: E259419
 Start Date: 8/03/2022

Person Job Title: Administrator (B1) (PAO - Administration)
 Termination Date: []
 Date of Birth: 1/03/1987
 Location: 17 George Square
 Work Email: gregpaye@yahoo.com
 Country: United Kingdom

Continue

Person Type = Employee

Expand the section for the duplicate and check the Person Type field, if this is 'Employee' the **termination date is blank** and the person name matches the pending worker name, you will need to raise a Service Request (Internal Transfer to Advertised Post) attaching the [Request for Transfer, Additional Post or Secondment Form](#) and the approved [Job Requisition Business Case](#).

If the name matches but there is a **termination date in the past** select the previous worker record and click **Continue, following the steps for Rehire a previous employee.**

If the hire has indicated that they have been previously employed by the university, the Person Type field is 'Employee' but has not provided a National Insurance number, please request this from the candidate before proceeding.

OR

Person Type = Employee Casual

If the Person Type – is 'Employee-Casual' and the termination date is in the future or blank and the person name matches you must submit a Service Request to HR Operations to have the termination date brought forward. Use the category Enquiry>Casual Worker. **Please title the SR 'URGENT Reverse Casual Termination', including the hire date.**

The screenshot shows a web form titled "Add a Pending Worker". At the top right are buttons for "Save", "Submit", and "Cancel". A yellow warning banner reads: "If one of these people is the person you're adding, select the person. Else select no match. (PER-1332260)". Below this is a section titled "Potential Matches" with a radio button for "No match, add person". A second radio button is selected, showing a match for James Brown. The match details are as follows:

Person Name James Brown	Personal Job Title Administrator (B1) (PAO - Administration)
Legal Employer University of Edinburgh	Termination Date
Person Type Employee-Casual	Date of Birth 1/02/1957
Business Unit University of Edinburgh	Location 1-7 George Square
Department Academic and Student Administration - CAHSS	Work Email gregsayer@yahoo.com
Assignment Number E235419	Country United Kingdom
Start Date 6/03/2022	

At the bottom of the match details is a "Continue" button.

HR Operations will then reverse the termination and reenter 2 days before the hire date.

There may be instances where more than one duplicate is found, when there is an active worker type 'employee casual' and an inactive (terminated) employee record. In this scenario, you should merge with the employee record and you do not need to submit the Service Request to reverse the casual termination date.

OR

Person Type = Contingent Worker

If the Person Type =Contingent Worker **select 'No match'**, add person and continue with the add pending worker process. You must NOT merge the duplicate worker records or it may impact the continuous service date for the worker.

Once this is complete, continue with add pending worker process, selecting the match to merge with existing record using the Action 'Add Pending Worker Relationship'.

If the details do not match, click **No match, add person** then **Continue** and return to follow the create a pending worker process.

Further guidance on hiring a casual worker, external examiner, intermediary worker or taxable scholarship as an employee is available [here](#).

6. In the **Communication Info** section enter contact details for the new employee. A **personal email address** must be entered in both the personal email address and work email address field.

The screenshot shows the 'Add a Pending Worker' form. The 'Communication Info' section is highlighted with a blue border. It contains the following fields:

- Phones:** A dropdown menu for 'Type' with the option 'Select a value' and an '+ Add' button.
- Emails:** A dropdown menu for '*Type' with the option 'Work Email' selected, a text field for '*Email', and date fields for '*From Date' (10/11/2020) and '*To Date' (dd/mm/yyyy). There is also a checked 'Primary' checkbox and an 'Add' button.
- Continue:** A button at the bottom of the 'Communication Info' section.

7. Add **Address** details. If not recorded here, the candidate is reminded to check and enter this information in a preboarding task however this information is required for payroll and pension purposes.

Add a Pending Worker Submit Cancel

① When and Why Edit

② Personal Details Edit

③ Communication Info Edit

④ Addresses

Country
Select a value ▼

Continue

⑤ Citizenship Info

⑥ Family and Emergency Contacts

8. Add citizenship info – select the nationality of the candidate from the drop down

⑤ Citizenship Info + Add

Nationality
Select a value ▼

Continue

Then select **citizenship status** and a start date (and end date if applicable). To add more than one nationality click add. Then **Click continue**

⑤ Citizenship Info + Add

Nationality
United Kingdom ▼

Citizenship Status
Active ▼

From Date
dd/mm/yyyy 🗓

To Date
dd/mm/yyyy 🗓

Continue

9. Click Continue within the Family and Emergency Contacts section as the employee can complete these details themselves at the preboarding stage

Add a Pending Worker Submit Cancel

3 Communication Info Edit

4 Addresses Edit

5 Citizenship Info Edit

6 Family and Emergency Contacts

Relationship Contact Type
 Select a value

Continue

7 Employment Details

8 Additional Assignment Info

9 Maintain Managers

10. In the **Employment Details** section complete the fields marked with a * as these are mandatory, others should be completed depending on contract type

7 Employment Details

Pending Worker Person Type

*Proposed Person Type

*Business Unit

Primary Assignment
 Yes

Projected End Date

*Position

*Personal Job Title

*Grade Ladder

*Grade

Step

Department

*Location

100% Off campus working (Approved flexible working only)

Worker Category

*Assignment Category

Calculate FTE and headcount automatically

Working Hours

Derived Standard Working Hours
 35 Weekly

FTE

Working as a Manager

Fixed Term Reason Code

NHS Honorary Contract

Contract Review Date

*Research/Teaching&Research/Teaching Only

*HESA Activity Standard Occupational Classification

*HESA Level

HESA Reason for End of Contract

Clinical Increment Date

Off-Campus Working Days (Approved Flexible Working only)

*Default Expense Account

Continue

Field Name	Guidance for completion
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Pending Worker Person Type	Pending Worker
Proposed Person Type*	Employee
Business Unit*	Select relevant BU
Projected End Date	For fixed term contracts please provide
Position*	Please provide the position name, guidance on this is available in the Guide to Job Classifications and Position Management
Personal Job Title*	This automatically populates with the position name so it should be overwritten for a meaningful job title . This will also impact on correspondence e.g. contracts
Grade Ladder*	Ensure you complete the Grade Ladder and Grade details to automatically pull the salary through into the Salary details. For the university grade ladder use UE07 for Grade 7. Off-scale salary codes end in an N i.e. UE7N.
Grade*	As above
Step	Grade Step
Department	Select the relevant department
Location*	Location where employee will be based
Worker Category	Select the relevant worker category e.g Guaranteed Hours
100% Off campus working	Yes or No - Only to be updated to 'Yes' where it has been agreed that the employee will work 100% of time off campus as per the flexible working policy.
Assignment Category*	Select the appropriate from the dropdown, e.g open ended, fixed term
Working Hours	Defaults to 35 per week but can be amended, must be a weekly figure. For Guaranteed Hours assignments set the working hours to 0 per week to calculate a 0 FTE, and use the additional assignment information in a later section to record the details.
FTE	Automatically populates based on Working Hours
Working as a Manager	Yes/No
Fixed Term Reason Code	Must be provided for fixed term contracts.
NHS Honorary Contract	If applicable
Contract review Date	If applicable
Research/Teaching&Research/ Teaching only*	<p>1 - Academic Contract that is teaching only (applies only to contracts indicating that staff are teaching only. Teaching should include all related activities such as tutoring and preparation).</p> <p>2 - Academic Contract that is research only (should be used for those contracts where the primary academic employment function is research only, even though the contract may include a limited number of hours teaching (up to 6 hours per week or pro-rata for part-time staff)).</p> <p>3 - Academic contract that is both teaching and research (applies to contracts that include 6 or more hours of teaching per week (averaged over the number of actual teaching weeks) as a minimum (pro-rata for part-time staff) and the remaining contract hours as research only).</p> <p>4 - Non academic contract</p> <p>9 - Academic Contract that is neither teaching nor research (should be used for academic contracts where the primary employment function is not teaching and/or research).</p> <p>If a contract is for both academic and non-academic work then the appropriate code from 1 to 3 should only be used where the primary employment function is teaching and/or research.</p>
HESA Activity Standard Occupational Classification*	HESA Activity Standard Occupational Classification-select the appropriate option. For subsidiaries please select the code which

	matches closest the type of role. For subsidiaries this information will not be returned as part of the HESA submission For HESA Standard Occupational Classification information view this link Staff 2023/24 - Activity Standard Occupational Classification HESA
HESA Level*	This is now a mandatory field, please use the table below to select the appropriate HESA level according to the grade of the position being offered. Note staff in subsidiaries should use 'XpertHR Level N' in all instances
Clinical Increment Date	If applicable
Off Campus Working Days (Approved Flexible Working Only).	If a Flexible Working arrangement agreed (as per the Flexible Working Policy) please enter the days of the week the employee will be working off campus, e.g. Monday and Friday every week. If they will be working set days off campus over a different pattern to weekly (e.g fortnightly) please provide the details in this section (e.g. every other Friday from home). Note - It is important to provide this information here as this will provide HR Operations with the details required for the contract when it is requested. This field has a 150 character limit .
Default Expense Account Code*	Must be added – please refer to the approved Job Requisition Business Case Form. Please note in most circumstances the default expense account code will be the same as the salary costing code. The default expense code cannot be split.

HESA LEVEL

STAFF LEVEL CODE	STAFF LEVEL DESCRIPTION	GRADES ASSIGNED TO STAFF LEVEL CODE	ADDITIONAL CRITERIA
A0	Vice-Chancellor/Principal/Head of Initiation	Principal only	
B0	UCEA level 2	Vice-Principal/University Secretary	
C1	UCEA level 3A	Report to run by HR to identify this grouping	
C2	UCEA level 3B	College Registrar	
D1	UCEA level 3/4A1	Report to run by HR to identify this grouping	
D2	UCEA level 3/4A2	Report to run by HR to identify this grouping	
D3	UCEA level 3/4A3	Report to run by HR to identify this grouping	
E1	UCEA level 4A	XM1	
E2	UCEA level 4B	Report to run by HR to identify this grouping	
F1	UCEA level 5A	AC4, AM4, ACN4, AMN4, ACT4, AMT4 UE10 / OTHS Academic staff	
F2	UCEA level 5B	UE10 / OTHS Non-Academic staff (e.g. Professional services staff)	
I0	XpertHR level I	UE09, ECA8, AC3A, AC3B, ACN3, ACT3, AM3A, AM3B, AMN3, AMT3, ARW2, XM2A, XM2B	ARC ON SPINAL POINT 39, 40, 40, 44, 45, 46, 54, 58, 62, 66
J0	XpertHR level J	UE08, ECA7, AC2, AM2, ACN2, AMN2, ARW1, MC3, XM3A, XM3B, RCB3	ARC ON SPINAL POINT 37, 38, 49, 50, 60, 61, 65

K0	XpertHR level K	UE07, UE7N, ECA6, MC2, AFC7, ECA6, XM4A, XM4B, RCB4	ARC ON SPINAL POINT 29, 30, 30, 36, 41, 42, 47, 48, 51, 52, 53, 55, 56, 57, 59, 63, 64
L0	XpertHR level L	UE06, UE6N, ECA5, SDS1, MCA, MC1, AFC6, ECA5, XM5A, XM5B, RCB5, K375	
M0	XpertHR level M	UE05, UE04, UE5N, ECA4, AFC5, RCB6, XM6B	
N0	XpertHR level N	UE03, TR01, ECA3, MA1, MA3, RCB7, XM6A	
O0	XpertHR level O	UE02, ECA2, RCB8	
P0	XpertHR level P	UE01, ECA1	

Default Expense Account Code

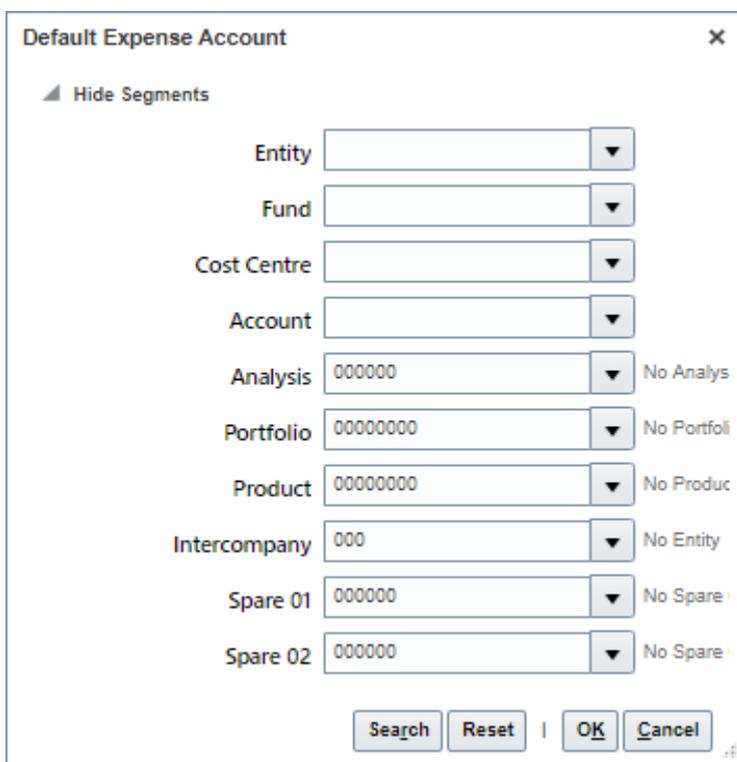
These are mandatory fields. Select the icon at the right of the field.

Default Expense Account



Complete all fields as per the details under 'Default Expense Account Code' on the approved Job Requisition Business Case form. Then press OK. The table below shows the default values, you must use the **cost centre relating to the school or department**.

	Code to use
Entity	110
Fund	110002
Cost Centre	From the JRBC Form
Account	2410
Analysis	000000
Portfolio	00000000
Product	00000000
Intercompany	000



Default Expense Account

Hide Segments

Entity ▼

Fund ▼

Cost Centre ▼

Account ▼

Analysis 000000 ▼ No Analys

Portfolio 00000000 ▼ No Portfoli

Product 00000000 ▼ No Produc

Intercompany 000 ▼ No Entity

Spare 01 000000 ▼ No Spare

Spare 02 000000 ▼ No Spare

Search Reset | OK Cancel

Then, press **Continue**

11. In the **Additional Assignment Info** section, select the dropdown and add Guaranteed Hours or Annualised/Fractional contract information as required, then click **Continue**:

For Guaranteed Hours (please note the information entered here feeds the GH App)

8 Additional Assignment Info

Info Group

Guaranteed Hours

OK Cancel

* Current Guaranteed Hours Start Date

Number of Hours Period

Guaranteed Hours End Date

Reason For No Hours

Number of Hours

Declined the Offer of a Fractional Contract During this Period?

Continue

- **Current Guaranteed Hours Start date field** - enter the same as the contract start date
- **Guaranteed Hours End date field** - enter the GH Period end date
- **Number of Hours field** - enter the minimum hours to be guaranteed in the initial GH period.
- **Number of Hours Period field** - select from one of the available drop down options (see [Appendix 2](#) for guidance and description)
- **Reason for No Hours** – do not enter anything here (HR Ops use only)

- **Declined the Offer of a Fractional Contract** – do not enter anything here (HR Ops use only)

Annualised/Fractional Information

12. In the **Maintain Managers** section, **Add** or **Edit** the line manager of the new hire as needed, then select **Continue**

13. In the **Payroll** section select UoE Group in the **Payroll Frequency** section then select **University of Edinburgh** as the **Tax Reporting Unit**. Click **Continue**.

The screenshot shows the 'Add a Pending Worker' interface. At the top, there are 'Save', 'Submit', and 'Cancel' buttons. Below the header, there are three sections: '7 Employment Details', '8 Additional Assignment Info', and '9 Maintain Managers', each with an 'Edit' button. The '10 Payroll Details' section is highlighted with a blue border and contains the following fields:

- Payroll Frequency:** *Payroll (dropdown menu showing 'UoE Group')
- Other Info:** *Tax Reporting Unit (dropdown menu showing 'University of Edinburgh')

A 'Continue' button is located at the bottom of the 'Payroll Details' section.

14. In the **Salary** section, use the **Salary Basis** dropdown to select **Annual Salary** then select **Continue**

The screenshot shows the 'Add a Pending Worker' interface with steps 9 and 10 visible. Step 11 'Salary' is highlighted with a blue border and contains the following fields:

- *Salary Basis:** A dropdown menu with 'Annual Salary' selected. A red box highlights this field.
- Total Amount:** 33,797.00
- *Salary Amount:** 33,797.00 GBP Annually. A red box highlights this field.
- Annual Salary:** 33,797.00 GBP (FTE 1)
- New Salary:** 33,797.00 GBP Annually (displayed in blue text)
- Grade Ladder:** University Grade Ladder
- Grade Name:** UE07
- Grade Step:** UE07 - Step 1

A 'Continue' button is located at the bottom of the 'Salary' section.

The salary amount should populate for all on-scale salaries. If this is an off-scale salary, populate the **Salary Amount** field as appropriate

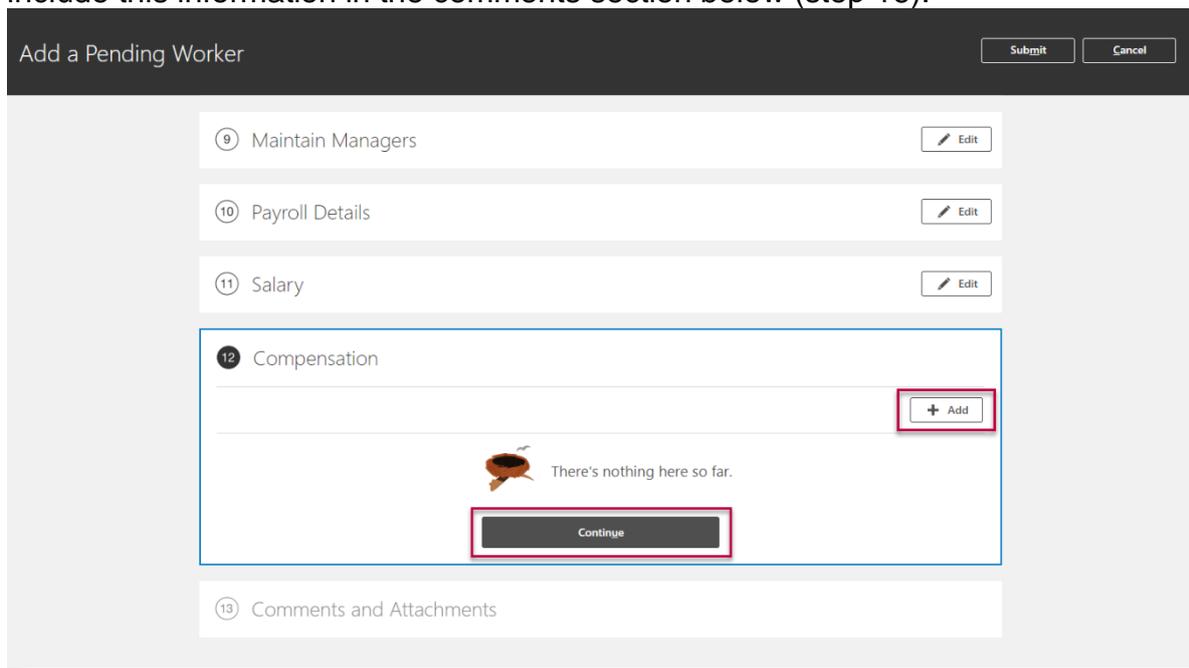
15. Update the **Compensation** section if any additional allowances are to be added. There are 14 allowance types that can be selected:

- Acting Up Allowance
- Contractual Overtime
- Deans Honorarium
- Head of School
- London Weighting Allowance

- On Call Payment
- Overseas Supplement
- Premium Bands
- Responsibility Allowance
- Royal Society Award
- Secondment Allowance
- Wardens Allowance
- Wellcome Trust Allowance
- Wellcome Trust Fellowship

You can bypass this by clicking **Continue** if there is no allowance to add.

To add an allowance, select **Add**. If the allowance you require is not listed please include this information in the comments section below (step 16).



The screenshot shows a web form titled "Add a Pending Worker" with a dark header bar containing "Submit" and "Cancel" buttons. The form is divided into several sections, each with a numbered icon and an "Edit" button:

- 9 Maintain Managers
- 10 Payroll Details
- 11 Salary
- 12 Compensation
- 13 Comments and Attachments

The "Compensation" section (12) is highlighted with a blue border. It contains a text input field, a "+ Add" button (highlighted with a red box), and a message "There's nothing here so far." with a small icon of a bowl. Below the message is a "Continue" button (also highlighted with a red box).

Select the 'Plan' (Allowance). The example shown is the addition of a London weighting. The screen will vary depending on the allowance selected. There will be on screen guidance to help. Select **OK** then **Continue**.

12 Compensation

***Plan**
London Weighting Allowance

***Option**
London Weighting Allowance

***Start Date**
09/02/2022

End Date
 Ongoing

***Amount**
3,000.00

***Periodicity**
Annually

Work Units Conversion Rule
UoE Rate Annualized

Hours Worked

Pay Value

[Hide Plan Info](#)

Allowance Description

Payable to those who, as a condition of employment, are required to normally work in London or parts of Greater London and as a consequence are required to live in London or within daily commuting distance.

What information do I need to enter?

You must enter a start date and end date for this allowance. London Weighting in most cases will be ongoing with no end date, so you should enter 31/12/2066 in the end date field. If there will be a specific end date for the allowance you should add that date.

The 'Amount' field defaults to 3,000.00 and is the annual amount the employee will receive. Do not override this value. The annual amount will be divided by 12 (months in the year) and paid in monthly instalments to the employee.

Leave the 'Pay Value' field blank as this is for payroll use only.

13 Comments and Attachments

16. Add any comments and upload the completed Job Requisition Business Case form and New Appointee Information Form to the **Comments and Attachments** section then click **Submit**. Please also use this section to list any allowances not able to select in step 15, and use this to provide any supporting documentation/rationale for the allowance.

If more than one allowance is required click add to enter this and repeat the steps as above

1 When and Why	<input type="button" value="Edit"/>						
2 Assignment	<input type="button" value="Edit"/>						
3 Salary	<input type="button" value="Edit"/>						
<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> 4 Compensation <input type="button" value="+ Add"/> </div> <table style="width: 100%; border-collapse: collapse;"> <tr style="border: 2px solid red;"> <td style="padding: 5px;">RJ Car Allowance 1200CC 1/1/22 - Ongoing</td> <td style="padding: 5px; text-align: right;">150.00 USD Recurring</td> <td style="text-align: right; padding: 5px;"><input type="button" value="Edit"/></td> </tr> <tr> <td style="padding: 5px;">RJ Car Allowance 1200CC 1/1/20 - 12/31/21</td> <td style="padding: 5px; text-align: right;">100.00 USD Recurring</td> <td style="text-align: right; padding: 5px;"><input type="button" value="Edit"/></td> </tr> </table> <p style="font-size: small; margin-top: 5px;">Show Prior Compensation</p> </div>		RJ Car Allowance 1200CC 1/1/22 - Ongoing	150.00 USD Recurring	<input type="button" value="Edit"/>	RJ Car Allowance 1200CC 1/1/20 - 12/31/21	100.00 USD Recurring	<input type="button" value="Edit"/>
RJ Car Allowance 1200CC 1/1/22 - Ongoing	150.00 USD Recurring	<input type="button" value="Edit"/>					
RJ Car Allowance 1200CC 1/1/20 - 12/31/21	100.00 USD Recurring	<input type="button" value="Edit"/>					

Offered Plan

Existing Plan

Add a Pending Worker

10 Payroll Details Edit

11 Salary Edit

12 Compensation Edit

13 Comments and Attachments

Comments Comments

Attachments

 Drag files here or click to add attachment

Submit Cancel

Once approved the onboarding Journey 'Welcome to the University of Edinburgh' will be automatically assigned.

Rehire a previous employee

If the National Insurance Number matches one held for a previous employee and the Person Name matches the pending worker name, select the previous worker record and click **Continue**.

The screenshot shows the 'Add a Pending Worker' interface. At the top, there are 'Submit' and 'Cancel' buttons. Below them is a text input field containing 'M5763645' and a checked 'Primary' checkbox. A yellow warning box contains the text: 'If one of these people is the person you're adding, select the person. Else select no match. (PER-1532260)'. Under the heading 'Potential Matches', there is a radio button for 'No match, add person'. Below that, a table lists a match with a red square icon, 'Person Name', and 'Personal Job Title Tutor (CI) (ACAD - Teacher)'. A red box highlights the 'Continue' button at the bottom of the match selection area. Below the match selection, there are three sections: '3 Communication Info', '4 Addresses', and '5 Citizenship Info'.

If the names, do not match confirm the National Insurance Number is correct. If necessary, click **No match, add person** then **Continue** and return to follow [the create a pending worker process](#).

1. Click **OK** to confirm you wish to create a new work relationship for this person
2. **Check the boxes** against all the info you would like to manage and then press **Continue**.

The screenshot shows the 'What info do you want to manage?' screen. At the top right, there are 'Continue' and 'Cancel' buttons. The main content area contains seven checkboxes, all of which are checked: 'Communication Info', 'Citizenship Info', 'Family and Emergency Contacts', 'Additional Assignment Info', 'Maintain Managers', 'Compensation', and 'Comments and Attachments'.

3. Enter the **When and Why** information then click **Continue**.

of EDINBURGH

Create Work Relationship

Submit Cancel

1 When and Why

When is the work relationship start date?
12/11/2020

Why are you adding a work relationship?
Future hire to fill vacant position

Legal Employer
University of Edinburgh

Proposed Worker Type
Employee

*What's the way to create the work relationship?
Add Pending Worker

Continue

2 Personal Details

3 Communication Info

4 Addresses

- a) **What's the way to create the work relationship? – select Add a Pending Worker (if there is already a pending worker record please select add pending worker relationship)**
- b) **Why are you adding a work relationship? – select Future Hire to fill vacant position**

4. Confirm the personal details are correct then click **Continue**.

Create Work Relationship

DD Daffy Duck

Submit Cancel

1 When and Why

2 Personal Details

Name

Last Name
Duck

First Name
Daffy

Title
Mr.

Biographical Info

Continue

3 Communication Info

4 Addresses

Where necessary, click the edit icon to amend information.

- 5. Communication Info** - Rehires may already have a work email address which you cannot amend. If this field is blank please add the personal email address. In the home email field please add the personal email address for the hire. Add or amend other Communication Info as required then click **Continue**.

The screenshot shows the 'Create Work Relationship' form for 'Daffy Duck'. The 'Communication Info' section is active and highlighted with a blue border. It contains two sub-sections: 'Phones' and 'Emails'. The 'Phones' section has a '+ Add' button highlighted with a red box. The 'Emails' section has a '+ Add' button and a list of email addresses. The 'Home Email' and 'Work Email' fields are highlighted with red boxes. The 'Continue' button at the bottom of the section is also highlighted with a red box.

- 6. Add or amend Address details** as required then click **Continue**.

The screenshot shows the 'Create Work Relationship' form for 'Daffy Duck'. The 'Addresses' section is active and highlighted with a blue border. It contains a list of addresses. The 'Home Address' field is highlighted with a red box. The 'Continue' button at the bottom of the section is also highlighted with a red box.

7. Add or amend **Citizenship Info** as required then click **Continue**.

The screenshot shows a web form titled "Create Work Relationship". At the top right, there are "Submit" and "Cancel" buttons. The form is divided into several sections, each with a numbered icon and an "Edit" button:

- 3 Communication Info
- 4 Addresses
- 5 **Citizenship Info** (highlighted with a blue border)
- 6 Employment Details
- 7 Additional Assignment Info

Inside the "Citizenship Info" section, there is a table with the following data:

Nationality	From Date
United Kingdom	1/10/2020
Citizenship Status	To Date
Active	20/02/2024

Below the table is a "Continue" button. To the right of the table, there is an "Add" button and an "Edit" button. The "Add" button and the "Continue" button are highlighted with red boxes in the image.

8. In the **Employment Details** section complete the fields marked with a * as these are mandatory, others should be completed depending on contract type

6 Employment Details

<p>Pending Worker Person Type <input type="text" value="Pending Worker"/></p> <p>*Proposed Person Type <input type="text" value="Employee"/></p> <p>*Business Unit <input type="text" value="Select a value"/></p> <p>Primary Assignment Yes</p> <p>Projected End Date <input type="text" value="dd/mm/yyyy"/></p> <p>*Position <input type="text" value="Select a value"/></p> <p>*Personal Job Title <input type="text"/></p> <p>*Grade Ladder <input type="text" value="Select a value"/></p> <p>*Grade <input type="text" value="Select a value"/></p> <p>Step <input type="text" value="Select a value"/></p> <p>Department <input type="text" value="Select a value"/></p> <p>*Location <input type="text" value="Select a value"/></p> <p>100% Off campus working <input type="text" value="No"/></p> <p>Worker Category <input type="text" value="Select a value"/></p>	<p>*Assignment Category <input type="text" value="Select a value"/></p> <p><input checked="" type="checkbox"/> Calculate FTE and headcount automatically</p> <p>Working Hours <input type="text" value="35"/> <input type="text" value="Weekly"/></p> <p>Derived Standard Working Hours 35 Weekly</p> <p>FTE <input type="text" value="1"/></p> <p>Working as a Manager <input type="text" value="No"/></p> <p>Fixed Term Reason Code <input type="text"/></p> <p>NHS Honorary Contract <input type="text"/></p> <p>Contract Review Date <input type="text" value="dd/mm/yyyy"/></p> <p>*Research/Teaching&Research/Teaching Only <input type="text"/></p> <p>*HESA Activity Standard Occupational Classification <input type="text"/></p> <p>*HESA Level <input type="text"/></p> <p>HESA Reason for End of Contract <input type="text"/></p> <p>Clinical Increment Date <input type="text" value="dd/mm/yyyy"/></p> <p>*Default Expense Account <input type="text"/></p>
---	--

Continue

Field Name	Guidance for completion
Pending Worker Person Type	Pending Worker
Proposed Person Type*	Employee
Business Unit*	Select relevant BU
Projected End Date	For fixed term contracts please provide
Position*	Please provide the position name, guidance on this is available in the Guide to Job Classifications and Position Management
Personal Job Title*	This automatically populates with the position name so it should be overwritten for a meaningful job title. This will also impact on correspondence e.g. contracts
Grade Ladder*	Ensure you complete the Grade Ladder and Grade details to automatically pull the salary through into the Salary details. For the university grade ladder use UE07 for Grade 7. Off-scale salary codes end in an N i.e. UE7N.
Grade*	As above
Step	Grade Step
Department	Select the relevant department
Location*	Location where employee will be based

100% Off campus working.	Yes or No - Only to be updated to 'Yes' where it has been agreed that the employee will work 100% of time off campus as per the flexible working policy.
Worker Category	Select the relevant worker category e.g Guaranteed Hours
Assignment Category*	Select the appropriate from the dropdown, e.g open ended, fixed term
Working Hours	Defaults to 35 per week but can be amended, must be a weekly figure. For Guaranteed Hours assignments set the working hours to 0 per week to calculate a 0 FTE, and use the additional assignment information in a later section to record the details.
FTE	Automatically populates based on Working Hours
Working as a Manager	Yes/No
Fixed Term Reason Code	Must be provided for fixed term contracts.
NHS Honorary Contract	If applicable
Contract review Date	If applicable
Research/Teaching&Research/ Teaching only*	1 - Academic Contract that is teaching only 2 - Academic Contract that is research only 3 - Academic contract that is both teaching and research 4 - Non academic contract 9 - Academic Contract that is neither teaching nor research
HESA Activity Standard Occupational Classification*	HESA Activity Standard Occupational Classification-select the appropriate option. For subsidiaries please select the code which matches closest the type of role. For subsidiaries this information will not be returned as part of the HESA submission For HESA Standard Occupational Classification information for 2019/2020 click here .
Level*	This is now a mandatory field, please use the table below to select the appropriate Level according to the grade of the position being offered.
Clinical Increment Date	If applicable
Off Campus Working Days (Approved Flexible Working Only).	If a Flexible Working arrangement agreed (as per the Flexible Working Policy) please enter the days of the week the employee will be working off campus, e.g. Monday and Friday every week. If they will be working set days off campus over a different pattern to weekly (e.g fortnightly) please provide the details in this section (e.g. every other Friday from home). Note - It is important to provide this information here as this will provide HR Operations with the details required for the contract when it is requested. This field has a 150 character limit
Default Expense Account Code* (see below for further guidance)	Must be added – please refer to the approved Job Requisition Business Case Form. Please note in most circumstances the default expense account code will be the same as the salary

	costing code. The default expense code cannot be split.
--	---

HESA LEVEL

STAFF LEVEL CODE	STAFF LEVEL DESCRIPTION	GRADES ASSIGNED TO STAFF LEVEL CODE	ADDITIONAL CRITERIA
A0	Vice-Chancellor/Principal/Head of Initiation	Principal only	
B0	UCEA level 2	Vice-Principal/University Secretary	
C1	UCEA level 3A	Report to run by HR to identify this grouping	
C2	UCEA level 3B	College Registrar	
D1	UCEA level 3/4A1	Report to run by HR to identify this grouping	
D2	UCEA level 3/4A2	Report to run by HR to identify this grouping	
D3	UCEA level 3/4A3	Report to run by HR to identify this grouping	
E1	UCEA level 4A	XM1	
E2	UCEA level 4B	Report to run by HR to identify this grouping	
F1	UCEA level 5A	AC4, AM4, ACN4, AMN4, ACT4, AMT4 UE10 / OTHS Academic staff	
F2	UCEA level 5B	UE10 / OTHS Non-Academic staff (e.g. Professional services staff)	
I0	XpertHR level I	UE09, ECA8, AC3A, AC3B, ACN3, ACT3, AM3A, AM3B, AMN3, AMT3, ARW2, XM2A, XM2B	ARC ON SPINAL POINT 39, 40, 40, 44, 45, 46, 54, 58, 62, 66
J0	XpertHR level J	UE08, ECA7, AC2, AM2, ACN2, AMN2, ARW1, MC3, XM3A, XM3B, RCB3	ARC ON SPINAL POINT 37, 38, 49, 50, 60, 61, 65
K0	XpertHR level K	UE07, UE7N, ECA6, MC2, AFC7, ECA6, XM4A, XM4B, RCB4	ARC ON SPINAL POINT 29, 30, 30, 36, 41, 42, 47, 48, 51, 52, 53, 55, 56, 57, 59, 63, 64
L0	XpertHR level L	UE06, UE6N, ECA5, SDS1, MCA, MC1, AFC6, ECA5, XM5A, XM5B, RCB5, K375	
M0	XpertHR level M	UE05, UE04, UE5N, ECA4, AFC5, RCB6, XM6B	
N0	XpertHR level N	UE03, TR01, ECA3, MA1, MA3, RCB7, XM6A	
O0	XpertHR level O	UE02, ECA2, RCB8	
P0	XpertHR level P	UE01, ECA1	

Default Expense Account Code

Select the icon at the right of the field

Default Expense Account



Complete all fields as per the details on the approved Job Requisition Business Case form, or you can search for the appropriate values and select from a list of default options. Then press OK.

Default Expense Account ✕

▲ Hide Segments

Entity

Fund

Cost Centre

Account

Analysis 000000 No Analys

Portfolio 00000000 No Portfoli

Product 00000000 No Produc

Intercompany 000 No Entity

Spare 01 000000 No Spare

Spare 02 000000 No Spare

|

Then, press **Continue**

9. In the **Additional Assignment Info** section, select the dropdown and add Guaranteed Hours or Annualised/Fractional contract information as required, then click **Continue**:

For Guaranteed Hours (please note the information entered here feeds the GH App)

Add a Pending Worker Submit Cancel

6 Family and Emergency Contacts Edit

7 Employment Details Edit

8 Additional Assignment Info

Info Group: Guaranteed Hours

Guaranteed Hours

Research Information for PURE

Guaranteed Hours

Annualised/Fractional information

HESA Clinical (Contract)

There's nothing here so far.

Continue

9 Maintain Managers

10 Payroll Details

8 Additional Assignment Info

Info Group: Guaranteed Hours

Guaranteed Hours

OK Cancel

*Current Guaranteed Hours Start Date: dd/mm/yyyy

Guaranteed Hours End Date: dd/mm/yyyy

Number of Hours:

Number of Hours Period:

Reason For No Hours:

Declined the Offer of a Fractional Contract During this Period?:

Continue

- **Current Guaranteed Hours Start date field** - enter the same as the contract start date
- **Guaranteed Hours End date field** - enter the GH Period end date
- **Number of Hours field** - enter the minimum hours to be guaranteed in the initial GH period.
- **Number of Hours Period field** - select from one of the available drop down options (see [Appendix 2](#) for guidance and description)
- **Reason for No Hours** – do not enter anything here (HR Ops use only)
- **Declined the Offer of a Fractional Contract** – do not enter anything here (HR Ops use only)

Annualised/Fractional Information

Create Work Relationship Submit Cancel

6 Employment Details Edit

7 Additional Assignment Info

Info Group: Annualised/Fractional Information

Annualised/Fractional information OK Cancel

*HOURS_TO_BE_WORKED_SCHEDULED	Number of Hours per week
Annual Leave Hours	Percentage for annual leave
ANNIVERSARY_START_DATE dd/mm/yyyy	Total Annualised Hours per Annum
End Date dd/mm/yyyy	Average Annualised Weekly Hours
Number of Weeks Per Year	Fractional Period

Continue

10. In the **Maintain Managers** section, **Add** or **Edit** the line manager of the new hire as needed, then select **Continue**.

Create Work Relationship Submit Cancel

6 Employment Details Edit

7 Additional Assignment Info Edit

8 Maintain Managers

+ Add

EC Emma Cunningham
Core Systems Training Consultant Line Manager Edit

Continue

9 Work Relationship Info

10 Payroll Details

11 Salary

11. Click **Continue** in the **Work Relationship Info** section

The screenshot shows the 'Create Work Relationship' form with a dark header. The 'Work Relationship Info' section (step 9) is highlighted with a red box and contains a 'Continue' button. Other sections include 'Additional Assignment Info', 'Maintain Managers', 'Payroll Details', 'Salary', 'Compensation', and 'Add Direct Reports'. 'Submit' and 'Cancel' buttons are in the top right.

12. In the **Payroll Details** section select UoE Group in the **Payroll Frequency** section then select **University of Edinburgh** as the **Tax Reporting Unit**. Click **Continue**.

13. In the **Salary** section, use the **Salary Basis** dropdown to select **Annual Salary** then select **Continue**.

The screenshot shows the 'Create Work Relationship' form with the 'Salary' section (step 11) highlighted. The 'Salary Basis' dropdown is set to 'Annual Salary'. The 'Salary Amount' is 42,793.00 GBP Annually. The 'Grade Ladder' is University Grade Ladder, 'Grade Name' is UE08, and 'Grade Step' is UE08 - Step 2. The 'New Salary' is 42,793.00 GBP Annually. A 'Continue' button is highlighted with a red box. 'Submit' and 'Cancel' buttons are in the top right.

The salary amount should populate for all on-scale salaries. If this is an off-scale salary, populate the **Salary Amount** field as appropriate

14. Update the **Compensation** section if any additional allowances are to be added. There are 14 allowances (see appendix) that can be selected, if the allowance you require is not listed please include this information in the comments section below. You can bypass this by clicking **Continue** if there is no allowance to add. To add an allowance, select **Add**.

The screenshot shows a web interface for 'Create Work Relationship' for 'Daffy Duck'. The interface is divided into several sections, each with an 'Edit' button. The sections are: 9 Work Relationship Info, 10 Payroll Details, 11 Salary, 12 Compensation, 13 Add Direct Reports, and 14 Comments and Attachments. The 'Compensation' section (12) is currently active and highlighted with a blue border. It contains a '+ Add' button and a 'Continue' button, both of which are highlighted with red boxes. Below the '+ Add' button, there is a message: 'There's nothing here so far.' with a small icon of a bird.

15. **Select the 'Plan' (Allowance).** The example shown is the addition of a London weighting. The screen will vary depending on the allowance selected and the in system eligibility criteria. There will be on screen guidance to help. Select **OK** then **Continue**.

12 Compensation

OK
Cancel

***Plan**

London Weighting Allowance

***Start Date**

01/03/2022

End Date

01/03/2022

Ongoing

***Periodicity**

Annually

Work Units Conversion Rule

UoE Rate Annualized

Hours Worked

Pay Value

***Amount**

3,000.00

Hide Plan Info

Allowance Description

Payable to those who, as a condition of employment, are required to normally work in London or parts of Greater London and as a consequence are required to live in London or within daily commuting distance.

What information do I need to enter?

You must enter a start date and end date for this allowance. London Weighting in most cases will be ongoing with no end date, so you should enter 31/12/2066 in the end date field. If there will be a specific end date for the allowance you should add that date.

The 'Amount' field defaults to 3,000.00 and is the annual amount the employee will receive. Do not override this value. The annual amount will be divided by 12 (months in the year) and paid in monthly instalments to the employee.

Leave the 'Pay Value' field blank as this is for payroll use only.

Continue

13 Comments and Attachments

If more than one allowance is required If more than one allowance is required click add to enter this and repeat the steps as above

1 When and Why
Edit

2 Assignment
Edit

3 Salary
Edit

4 Compensation
+ Add

RJ Car Allowance 120000 1/1/22 - Ongoing	150.00 USD Recurring	Edit
RJ Car Allowance 120000 1/1/20 - 12/31/21	100.00 USD Recurring	Edit

Show Prior Compensation

Offered Plan
Existing Plan

16. If required, **Add Direct Reports** by searching and selecting existing employees to report into the new hire then select **Continue**.

The screenshot shows the 'Create Work Relationship' form at step 13, 'Add Direct Reports'. The form has a dark header with a profile icon, the title 'Create Work Relationship', and 'Submit' and 'Cancel' buttons. Below the header are four steps: 10 Payroll Details, 11 Salary, 12 Compensation, and 13 Add Direct Reports. Step 13 is highlighted with a blue border. It contains a search bar with the text 'Search for people to add as reports' and a dropdown menu showing 'narayan'. Below the search bar is a table with the following data:

Name	Personal Job Title	Work Email	Person Number
AN Ankita Narayan	Systems Trainer	e.steele@ed.ac.uk_DM_TEST	179934
[blurred]	[blurred]	[blurred]	[blurred]
[blurred]	[blurred]	[blurred]	[blurred]
[blurred]	[blurred]	[blurred]	[blurred]

Below the table is step 14, 'Comments and Attachments', which is partially visible.

17. Add any comments and upload the completed Job Requisition Business Case form and New Appointee Information Form to the **Comments and Attachments** section then click **Submit**.

The screenshot shows the 'Create Work Relationship' form at step 14, 'Comments and Attachments'. The form has a dark header with a profile icon, the title 'Create Work Relationship', and 'Submit' and 'Cancel' buttons. Below the header are four steps: 11 Salary, 12 Compensation, 13 Add Direct Reports, and 14 Comments and Attachments. Step 14 is highlighted with a blue border. It contains a 'Comments' section with a text input field and an 'Attachments' section with a dashed box and a green upload icon. The text 'Drag files here or click to add attachment' is visible below the dashed box.

Once approved the onboarding Journey 'Rejoining the University of Edinburgh' will automatically be assigned.

Appendix 1

Allowances configured for compensation section - If the allowance you need is not listed please add this to the comments section and use the attachments for any additional information/rationale.

- Acting Up Allowance
- Contractual Overtime
- Deans Honorarium
- Head of School
- London Weighting Allowance
- On Call Payment
- Overseas Supplement
- Premium Bands
- Responsibility Allowance
- Royal Society Award
- Secondment Allowance
- Wardens Allowance
- Wellcome Trust Allowance
- Wellcome Trust Fellowship

Appendix 2 Description for Guaranteed Hours Period Hours Cover / Number of Hours Period Field

Each should be used in the following scenarios:

Option	Description	When to use
Over Period of Current GHC	Minimum hours to be guaranteed for full duration of GH contract e.g. over the 2-year fixed term contract	<ul style="list-style-type: none"> • The GH period start and end date and Fixed Term Contract start and projected end date must be the same • You do not need to tick the Annually reviewed box in the Job Offer Additional Information screen • No GH refresh letter is required unless the fixed term contract is subsequently extended. • This option and Over Period of Current FTC are similar. Please check with your HR partner if there is a preferred approach in your School/Department
Over Period of Current FTC	Minimum hours to be guaranteed for full duration of the current fixed term contract.	<ul style="list-style-type: none"> • The GH period start and end date and Fixed Term Contract start and projected end date must be the same • You do not need to tick the Annually reviewed box in the job

		<p>offer Additional Information screen</p> <ul style="list-style-type: none"> No GH refresh letter is required unless the fixed term contract was extended. This option and Over Period of Current GHC are similar. Please check with your HR partner if there is a preferred approach in your School/Department
Per Year	The minimum hours to be guaranteed for one GH Period.	<ul style="list-style-type: none"> This option is recommended for individuals getting a contract for a number of years. The GH period is a year from the GH Start date. i.e. if start date is 01/09/2023 the GH end date must be 31/8/2024 The GH employee will only get access to a timecard to claim payment if they have a current GH period You do need to tick the Annually Reviewed box in the job offer Additional Information screen You need to send a GH refresh letter at the end of each GH period
Per Year, Every Year for (use with open ended contracts)	The minimum hours to be guaranteed are to be the same minimum hours for each GH Period, indefinitely	<ul style="list-style-type: none"> This option is usually used for open-ended assignments. By selecting this option, from the outset of the contract, you are guaranteeing the employee the same minimum hours each year from the duration of the open-ended contract. This may be an issue if the demand for the work or budget available changes over time. You do not need to tick the Annually reviewed box in the job offer Additional Information screen There is no need to send a GH refresh letter, but you should monitor the actual number of hours worked versus the minimum guarantee.
Per Year/Every Year-Over Dura/FTC	The minimum hours to be guaranteed are to be the same for each GH Period for	<ul style="list-style-type: none"> Use this if you have a stable requirement for hours. By selecting this option, from the outset of the contract, you are guaranteeing the employee the same minimum

	<p>the full duration of the fixed term employment contract related to that assignment.</p>	<p>hours each year from the duration of the fixed term contract. This may be an issue if the demand for the work or budget available changes over time.</p> <ul style="list-style-type: none"> • You do not need to tick the Annually reviewed box in the job offer Additional Information screen • There is no need to send a GH refresh letter, but you should monitor the actual number of hours worked versus the minimum guarantee. • No refresh letter is required unless the fixed term contract is extended.
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