THE UNIVERSITY of EDINBURGH

# Settling into the University of Edinburgh

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February 2023 v1.0

## Introduction

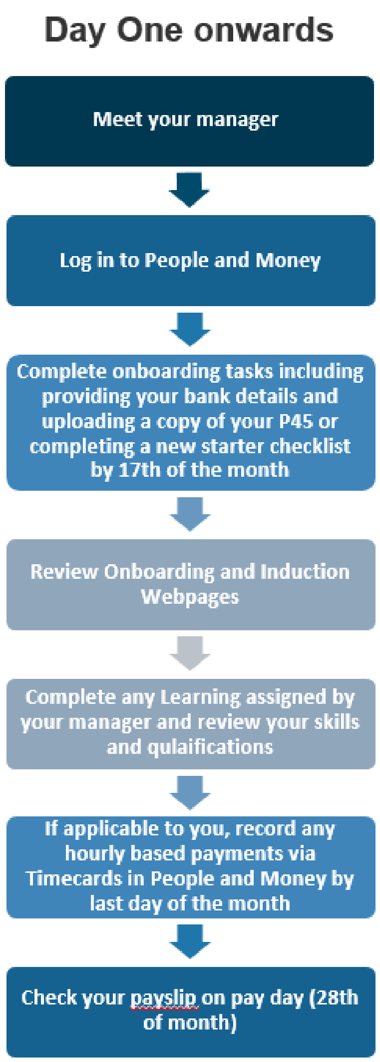
Welcome to the University of Edinburgh.

This guidance has been written to support anyone who is starting employment with the University or who might already be employed and is taking on an additional post or transferring to a new post. If you haven't already, please read 'A Guide to before you start employment' which will also support you.

The guidance outlines what we need you to do and what you can expect from your line manager and other colleagues involved in your employment. The University employs colleagues on a variety of contracts, so not all processes in this guidance will apply to you. If you are in any doubt about your contract or conditions of service please speak to your line manager in the first instance.

There are useful links to additional guidance or information in Appendix 1.

The diagram below highlights the high level steps you need to take from day one of your employment but please read on for further details.



## Induction

Your manager will welcome you to the University and look after you whilst you settle into your new role.

There are some useful resources on the Onboarding and Induction webpages. Please take time to review these pages.

On your first day (or as soon after as possible), you should ensure that you have completed the onboarding tasks within People and Money relating to providing your bank details and tax information (as outlined below) to ensure you are paid accurately and in a timely manner.

You will be prompted by the onboarding tasks to complete some required induction training and assessments (for example online courses in Data Protection, Information Security and Health and Safety). Please also take the time to review and update your skills and qualifications and review and update your personal, equality, diversity and inclusion information. Please note you can continue to update this information at any time during your employment in People and Money. Please take time to complete these within your first few weeks.

### New Staff Meet Up Sessions

Human Resources and the Institute for Academic Development are running 'New Staff Meet-Up' sessions, further information and booking details are available on the New Staff Meet Up webpage.

## Logging in to People and Money

People and Money is the University's HR and Finance system. You will need to access People and Money to complete any outstanding onboarding tasks.

Please speak to your line manager or local school/department administrator for your employee log in details.

Further information about your university login (also referred to as EASE) is available on the Your University Login webpage. The table below summarises the log in process.

| Category | On and after start date |
|---|---|
| New joiner or returner to the University | Log in to MyEd using your **staff login** details. Use Company Single Sign On button. |
| Student * | Log in to MyEd using your **staff login** details. Use **Company Single Sign On button.** If you are already a student of the University you will be provided with a new **staff login** which should be used to access People and Money for employment purposes. |

| | |
|---|---|
| Existing employee (transferring or taking or additional post) | Log in to MyEd using your **staff login** details. Use current UUN and password. |

* You may have reason to use People and Money for other purposes related to your studentship, in which case you should use the student login details you have been provided, for example to buy goods and services related to your studies.

Please note that if you are a student who is employed by the University AND is also required to purchase goods and services you will have two separate log-in routes. Please see the Guide for Students - Access to People and Money for further information (under the general heading on this page).

## Onboarding Tasks

### New employees or anyone returning to the University

**On your first day**, log in to People and Money, click **Me** and select the **Onboarding App**, scroll to the **'Tasks to Finish' to review and complete** your onboarding tasks. You may have completed some of these tasks before you started (as part on your pre-boarding) but it is worthwhile taking the time to review on your first day. This may include:

- Reading, signing and uploading your contract of employment.
    - Please note, that when you first log in to the system, your contract may not yet be ready. You should receive a notification from the system when this is available for you to view and sign.
- Providing your bank details so we can pay you
- Completing the new starter declaration form or providing a copy of your P45 from your previous employer
- Updating your personal details
- Providing Equality, Diversity Information

We recommend you read the following guidance document - How to complete onboarding tasks (under the heading of Recruitment and Onboarding, Onboarding section).

As a new or returning employee it is **important to complete these onboarding tasks on or before or on your first day of employment if you haven't done so already** to prevent any delays in payment.

### Guaranteed Hours Employees

If you are joining us on a Guaranteed Hours contract it is particularly important that you:

- add your bank details **prior to** the first payroll run after you join (usually around the 17th of the month).
- complete the new starter declaration form or add your P45 **prior to** the first payroll run after you join (usually around the 17th of the month), to make sure you are put on the correct tax code by HMRC or you may have additional tax deducted from your pay.

The most common reason for staff not being paid on time or not being paid the amount as expected is not adding bank details correctly or not providing tax details/completing a new starter declaration. Anyone returning to the university after a period of previous employment must also check these details are correct and fully completed.

### Existing employees taking on an additional post or transferring

As an existing member of staff, you will already have access to People and Money. As you are taking on a new position with the University you will be required to complete a small number of onboarding tasks which include:

- Reading, signing and uploading your contract of employment (you will receive a new contract of employment for each post you hold with the University)
- Checking your personal details are still up to date

Upon your start date to your new position, log in to People and Money, click **Me** and select the **Onboarding App**, scroll to the '**Tasks to Finish' to review and complete** your onboarding tasks.

Please note, if you cannot see any tasks, please let your new line manager or school/department administrator know as soon as possible as they can assign this to you. If you don't see the task 'Your contract is ready to sign', it is likely that our HR Operations Team are processing this and you will receive an email when it's ready.

## Getting Paid

The Payroll team will make arrangements for your monthly salary to be paid. Salaries are paid in equal instalments equivalent to 1/12 of annual salary, with the exception of Guaranteed Hours Employees who are paid on an hourly basis (see the section below). Salaries are pro-rated for mid-month starters/leavers. Proration is based on monthly pay, working hours available in the month and hours worked.

Salaries are paid monthly in arrears via BACS (Banks Automated Clearing System). This allows us to pay salary by direct transfer to the bank or building society account of each individual employee.

Salary payments are normally made on the 28th of each month unless this falls on a Saturday, Sunday or Scottish Bank Holiday, in which case payment will be made on the last working day prior to the 28th. You will be able to view your payslip two working days before pay day. In December, salaries are paid earlier and the actual date will be advised prior to payment.

If you are new or returning to the University with a start date after the payroll has run (usually the 18th/19th of the month)), you will be paid on the following month's pay day.

You can access your payslip in People and Money (two working days before pay day). Follow the how to view your payslip guidance or watch the demo video.

Information relating to Employment tax including income tax and National Insurance contributions can be found on our Tax Matters page.

Further information about payroll is available on the Payroll Services page.

### Hourly Based Payments - Claiming Hours Worked

All hourly based time should be claimed in People and Money.

You will usually submit your first timecard at the end of the first month of employment. This will ensure you get paid on the next pay day. If you do not submit a timecard for approval **by the last calendar day of the month**, you will be not get paid until the following month.

Your line manager or timekeeper will then review your timecard and either approve/submit, edit or reject your timecard. If your timecard is rejected you must take action to resolve the issue and resubmit the timecard or you will not receive any pay. Timecards must be approved and submitted by your line manager or timekeeper to Payroll by the 10th of the month.

Timecard submission processes vary across the University, you may be asked to enter this information yourself directly into People and Money, or your line manager or timekeeper for your area may enter hours worked on your behalf. **You will be advised of the process for your school or department as part of your induction.**

To complete your Timecard, log in to People and Money, click **Me** and select the **Time and Absence**s app, Click on **Current timecard**.

Claims can be made for the following time types:

- Guaranteed Hours (including any preparation, marking and contact time; sickness; training)

- Overtime
- Call Out hours
- Additional Hours
- Premium Band Overtime
- Intern Hours
- Union Duties

Time entered onto the Timecard should always reflect the actual hours worked on a particular day.

If you have not provided your bank details we will be unable to pay you, therefore it is important to complete the onboarding tasks described above.

The hours you have been paid will be displayed on your payslip.

Further information is available within the Guide to Time Recording.

## Pensions

The Pensions Office is responsible for the full administration and support services available for existing, former and potential members of the University's Pension arrangements. They can provide information about the schemes and options available to members but cannot provide financial advice.

As a new member of staff you are enrolled into a qualifying pension scheme when you become an eligible jobholder. Eligibility depends on your age and earnings. Staff employed on casual contracts will have their assessment postponed until month 3 of employment.

Further information is available on the Pensions Team pages.

## Other Payments

### Scholarship and Stipend Payments

If you are a student in receipt of a Scholarship or Stipend, payments are made via a BACS transfer to your bank account. Your school or department will contact you to provide your bank details Once the payment has been made you will receive a remittance advice by email to confirm the payment.

Please inform your School/College of any changes to your name or bank details as quickly as possible to prevent any disruption to your payment. You can also complete our bank account change form (EASE login required).

If you have any questions about your scholarship or stipend payment you should email finance.helpline@ed.ac.uk or submit an online enquiry form.

If you are both an employee and a student, you may be asked to provide your bank details more than once, for payroll, and for stipends and expenses. Please do so within the timescales outlined.

### Expenses

All employee's must claim expenses related to their employment using People and Money, (refer to the Expenses Policy for further information). Students **should not** claim expenses via People and Money unless they are related to their employment (e.g. tutor or demonstrator with a guaranteed hours contract of employment).

### Student claiming expenses in relation to employment

1. Students claiming expenses related to **their employment** should use People and Money to submit their claim.
2. Follow the guidance on the Finance Hub, following the link at the bottom of the page to 'Claiming Staff Expenses Procedure Guide'.

### Student Expenses in relation to studies

1. Students claiming expenses in relation to **their studies** (including Post Graduate Research) should complete the Student Expense Claim Form available on the Finance Forms webpage (Under Accounts payable).
2. Student expense claims should be submitted to your School's Student Support Office.
3. Schools and Departments must check the claim, seek authorisation and add appropriate finance coding before submitting on the student's behalf.
4. Completed forms should be submitted by the School/department to Finance.Helpline@ed.ac.uk.
5. Please see further guidance on the Finance Hub, following the link at the bottom of the page to 'Student Expense Claims'.

## Learning, Skills and Qualifications

Your manager may have assigned some additional learning which you can access via Me>Learning in People and Money.

Please also take the time to review and update your skills and qualifications and review and update your personal, equality, diversity and inclusion information. Please note you can continue to update this information at any time during your employment in People and Money.

Please also take time to review the Talent and Development webpages for further information on how you can continue your learning and development at the university.

## Probation

Your Terms and Conditions of employment and contract will state your probationary period. Where applicable, your employment is subject to the satisfactory completion of a probationary period. The length of a probation period will be stated within your contract and Terms and Conditions of employment, typically:

- 6 months for employees within Grades 1 – 5
- 12 months for employees within Grades 6 – 10

Throughout your probation period, your manager should ensure that regular informal meetings are held with you and should give you the opportunity to discuss your work and training requirements.

Please note if you transferring to a new post but have already completed a probationary period within the University you do not need to complete a further probationary period.

## Help

All employees have access to My Knowledge within People and Money and you should search this for support in the first instance. Follow the People and Money user guide 'How to search my knowledge'. If you cannot find the information you need you should raise a Service Request, following the P&M user guide 'How to raise and maintain a service request enquiry'. If you are unable to submit a Service request please email HRHelpline@ed.ac.uk.

## Appendices

### Useful Links for New Employees

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|---|---|
| Conditions of Service | https://www.ed.ac.uk/human-resources/policies-guidance/conditions-service |
| Finance Hub | For information in relation to Student payments, expenses and other Finance matters. Finance Hub - Home (sharepoint.com) available to you from your start date. |
| Human Resources | https://www.ed.ac.uk/human-resources |
| Human Resources - Policies and Guidance | https://www.ed.ac.uk/human-resources/policies-guidance |
| Onboarding and Induction Webpages | https://www.ed.ac.uk/human-resources/learning-development/on-boarding |
| Payroll | Payroll Services (sharepoint.com) |
| Pension Information | Pensions Team (sharepoint.com) |
| People and Money User Guides | There a number of useful guides for employees on our People and Money User guides page: https://www.ed.ac.uk/staff/services-support/hr-and-finance/people-and-money-system/people-and-money-user-guides<br><br>The following guides may help you in your first few days.<br>• How to access People and Money from any device (under the heading General guidance)<br>• How to complete onboarding tasks (under the heading of Recruitment and Onboarding> Onboarding).<br>• Guidance for Students - Access to People and Money (under the heading of General guidance).<br>• Guide to Time Recording (under the heading of Time recording).<br>• How to view your payslip guidance (under the heading of Payroll).<br>• Guide to Learning Skills and Qualifications for Employees and Learners (under the heading Learning Skills and Qualifications). |

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|---|---|
| People and Money Demo Videos | https://www.ed.ac.uk/staff/services-support/hr-and-finance/people-and-money-system/people-and-money-user-guides/people-and-money-demo-videos |
| Procurement | https://www.ed.ac.uk/procurement<br><br>For information in relation to Buying Goods and Services |
| Tax Information | Information relating to Employment tax including income tax and National Insurance contributions can be found on our Tax Matters page. |