Guide to Recruitment and Onboarding

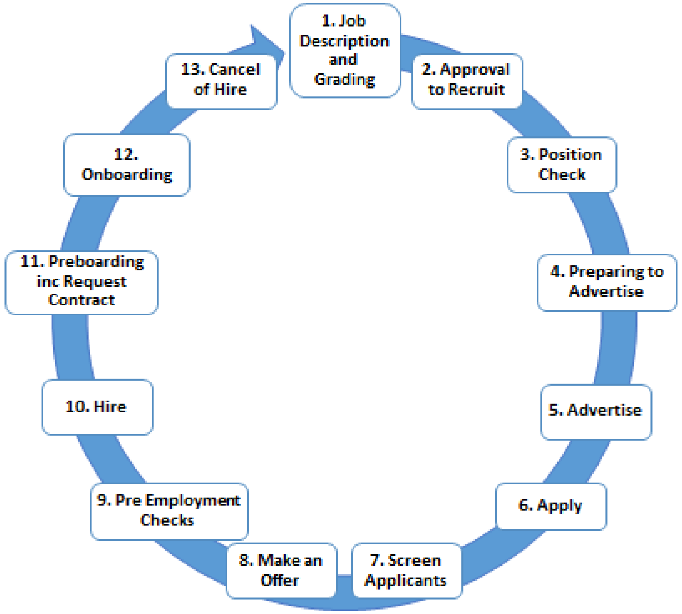
May 2025 V28.0

Introduction

This guidance document has been written to support the Recruitment and Onboarding (including Preboarding) end-to-end business process and details the main business scenarios within the University of Edinburgh. Recruitment processes are those that relate to permanent and fixed term appointments including guaranteed hours, tutors and demonstrators, annualised and fractional contracts. Preboarding and Onboarding refer to the activities you need to do from the point you select a candidate for a role to the end of their first 90 days in the University.

The guidance has been written by stage in the process and with the key roles involved in the process in mind. The responsibilities of a Line Manager, Hiring Manager and School or Department Administrator may vary in this process between Colleges, Schools and Professional Service Group Departments. Line Managers should contact their local support team to understand the process and responsibilities within their own area.

For example, a School or Department Administrator could be performing tasks in the recruitment process of a Line Manager or Hiring Manager and where there is overlap, this is shown.



Glossary

People and Money	People and Money
Additional Post	The process of adding another assignment to an employee who is working across more than one assignment.
Advertised Post	It is University's general policy to advertise all positions on the University's Website to leverage the University's brand as employer of choice and support Equality, Diversity and Inclusion. In all instances, Recruiters should also refer to the Redeployment Register. Advertising of a specific position in the organisation structure is managed using the Hiring app in People and Money. There are a number of exceptions (see Non-advertised assignment). Further information is available on the Advertising Guidelines page.
Assignment	The assignment of a person to a specific position or the record of the incumbent in a specific position in People and Money

Candidate Selection Process	This is the framework to move candidates through the hiring process. This allows tracking and management of candidate activity from the time their job application is confirmed to the time that they are hired. The framework uses “Phases” (Key Milestones) each of which have multiple “States” e.g. Interview and Selection (Phase) – Interview to be scheduled (State).
Certificate of Sponsorship	This is a certificate issued by the Home Office to confirm if a candidate can be sponsored. Please read the Guide to sponsorship of skilled workers and temporary worker sponsored researchers for further information
Delegated Authority Schedule (DAS)	https://www.ed.ac.uk/finance/for-staff/financial-regulations-policies-and-procedures/financial-regulations-overview-page/authorisation
Document Record	The part of People and Money, which holds electronic copies of certain documents. (where applicable)
Fixed Term Reason Codes	A list of acceptable reasons for the use of fixed term contracts https://www.ed.ac.uk/human-resources/policies-guidance/a-to-z-of-policies-and-guidance
Flexible Working	Is a specific variance to a standard contractual agreement that are different from a standard employment contract. The Flexible Working policy supports employees' statutory right to request a change to their working pattern, hours of work or location. If agreed, this results in a change to the contract of employment, which is permanent and guaranteed in the role.
Hybrid Working	A way of managing employee requests to work a mixture of ad-hoc, occasional and regular patterns that will involve working on and off campus within existing contractual agreements. It usually means that individuals undertake some of their work at their contractual place of work (usually on campus) and some remotely (usually at home). The exact balance will vary depending on the role, responsibilities, individual and the wider team. See the Hybrid Workplace Policy for further details
Internal Transfer	The process of moving an employee from one assignment to another
Job	A generic job title that is re-used across the University e.g. Administrator
Job Requisition	Adding the requirements of a job to People and Money to initiate the process of sourcing, selecting and hiring a candidate.
Job Requisition Business Case form	The form that must be completed as part of the request for approval to recruit. The form contains the business justification for the role and supplements the information contained on the Create Job Requisition screen. It must be attached in Section 9 of the Create Job Requisition screen.

Journey	A Journey is a collection of tasks that supports the joiner, transfer and leaver processes within the University. Journeys have replaced Onboarding and Leaver Checklists and Tasks (from 24 March 2025)
Longlisting	A long-list for a job is a large group that has been chosen from all the people who applied for the job. The successful ones from this group are chosen to go on the shortlist.
New Hire	A new employee who has not worked for the university previously
Non-advertised Post	There are certain circumstances when advertising to a specific position in the organisation structure may not be required, namely: • Where a Research Grant specifically names the researcher who is to be involved • Where there has been a recent external advertisement (within the last 6 months) for a similar position • Hiring someone for less than 6 months • Posts being filled by NHS staff after recruitment • Someone from the Redeployment Register is being appointed in which case a shortened recruitment process applies
Onboarding	Processes and activity between the employees first day and day ninety of employment
People and Money Hiring app	This is an app within People and Money used to advertise, select and hire staff.
Pending Worker	A pending worker is a person who has yet to start employment. A pending worker record can be created upon acceptance of the job offer in People and Money or by manually adding a pending worker record. Upon Day 1 of employment, the pending worker will become an employee.
Position	An instance of a job in a particular department. A “seat /slot” in the organisation structure (sometimes referred to as a “post”). May be filled by one or more people. All incumbents must have the same grade band, and sit within the same department. Specific to an individual business unit. Examples – Personal Chair, Manager, Research Assistant, Veterinary Nurse, Finance Administrator.
Preboarding	The activities required to be completed following recruitment and prior to an employee start date
PVG/Disclosure	The Protecting Vulnerable Groups (PVG) membership scheme is managed and delivered by Disclosure Scotland. It helps ensure people whose behaviour makes them unsuitable to work with children and protected adults cannot do 'regulated work' with these vulnerable groups. Please see the Disclosure and PVG Checks webpage for further guidance.
Recruitment	All recruiting activities related to Permanent and Fixed Term Contracts, Guaranteed Hours and Apprenticeships.
Rehire	An employee who has previously worked at the university
Secondment	The temporary transfer to another post for a fixed period. Secondments can be an internal secondment (UoE to UoE), external outgoing or external incoming.

Service Request	The term service request is used to describe a help ticket, which is opened with the HR Helpline and sent on to other HR teams to process as needed. It is often shortened to SR.
Shortlisting	The process of identifying the candidates from your applicant pool who best meet the required and desired criteria for the open requisition and who you want to move forward in the recruitment process.
Skilled worker	The Skilled Worker visa is the main work route under the Points Based Immigration System. This visa type was introduced on 1 December 2020 and has replaced a visa previously known as Tier 2 (General).
Subsidiary	The university consists of three subsidiary companies, Edinburgh Innovations, Edinburgh University Press, and UoE Accommodation Ltd. These three companies use People and Money; however, they do not use all parts of the system at the current time. For recruitment to these companies, see Appendix 1".
Substantive Post	An employee's permanent post - the one they return to after a temporary transfer or secondment to another post
Redeployment Register	A list of staff available for redeployment Redeployment Register | The University of Edinburgh
UKVI	This is the UK Visas and Immigration department, which is part of the Home Office of the UK Government. UK Visas and Immigration is responsible for making millions of decisions every year about who has the right to visit, stay, or work in the country. The University must comply with the legislation and processes outlined by the UKVI.
UKVI SOC	To be eligible for a Skilled Worker Visa, one of the mandatory criteria is that you have a job at an appropriate skill level as listed on the Skilled Occupation Codes of the Immigration rules
UUN	Your username is your staff universal username (UUN) that you use to login to the majority of University services, including People and Money and email.
Vacancy	A status to indicate the intention to recruit to a resource gap
Work Schedule	The working hours and work pattern an employee is contracted to work for each assignment they hold.

End to End Process Map

Please see the end to end Recruitment and Onboarding Process Map

Key Roles

Role	Description
Line Manager	All members of staff that have or will have direct or matrix style management responsibilities for the role being recruited. Line Managers may also be Hiring Managers.
Hiring Manager	Hiring Managers will have overall accountability for a set of job requisition actions and the associated job applications. The Hiring Manager is often the Line Manager but does not have to be.
School/Department Administrator (SDA)	Staff that provide local administrative/operational support for the end-end recruitment process, including offline activity and practical arrangements.
HR Operations	Members of the central HR team that own key transactional elements of the recruitment cycle, e.g. approving/rejecting job requisitions and job offers. Has visibility of job requisitions without being a member of the hiring team.
Collaborator	A current employee that is going to be on the selection panel or an SDA who needs visibility of the vacancy during the recruitment and onboarding process. Assists with some Recruiting type activities e.g. Sifting. Anyone in a post, which is Grade 7, and above, automatically has the Collaborator system role and can be added to a job requisition. Collaborators can view but not process applications.
Interview Panel Member	The current employee or an external person that is going to be on the selection and/or interview panel. Interview panellists may also be added to a job requisition as a Collaborator, but this can be done at any point in the recruitment process as required. Staff acting as an interview panel member will be added to the job requisition as a Collaborator to grant access to job applications. An external interview panel member will not be added to the requisition as a panel member, receiving relevant information (offline) via email.
HR Advisor/ HR Partner	A member of the HR Partnering team who can provide advice and guidance throughout the recruitment process with specific responsibility for Grading Job Descriptions and supporting HR Operations if any issues found at the 'Before Offer Check' stage.
Business Approver	Approval will go up through the line manager route (following up the hierarchy) in line with the Guide to Employment and Finance Approvals
Candidate	Could be an existing employee within the University (internal), a contingent worker or a member of the public (External).
HR Resourcing Team	Strategic Resourcing Partners within the HR function linking resourcing strategy directly to the University Strategic Plan outcomes, market conditions, talent management and succession plans. Develops policies, transformational & modern practices that are aligned to strategy outcomes.

HR Systems Team	The HR Systems team will have responsibility for the set up and maintenance of Oracle Recruitment Cloud and will be able to undertake all tasks assigned to other roles to ensure contingency support.
Agency	An employment agency that has been tasked with finding and submitting suitable candidates for open job requisitions. This may also be a training provider submitting candidates for Modern Apprenticeship opportunities.
HR Business Support team	Responsible for the coordination of job grading requests
Research Finance Administrators	Research Finance Administrators are a new user role with a set of access privileges in P&M. These individuals are based in the research support offices of schools and are responsible for managing directly incurred research salary costs.

Before you start a recruitment process using the Hiring App

Familiarise yourself with the Recruitment Guidance Webpages

Undertake the relevant **Recruitment Training** in People and Money, further information is available on the Planning your Recruitment webpage.

Review the Health and Safety Guidance on Recruitment.

Review the Recruitment User Guide flowchart and 'Before you create a job requisition'.

This guide applies to all types of staff including Guaranteed Hours (GH) staff and student interns. Consideration must be given to the time required to recruit GH staff. All staff, including GH staff, must not start work before they have received their contract of employment.

If you are considering recruitment of a sponsored worker (skilled worker or temporary worker sponsored researcher) please read the Guide to Sponsorship of Skilled Workers and Temporary Worker Sponsored Researchers.

If you are considering hiring a **Modern Apprentice** please read the comprehensive guidance on Modern Apprentice Programme | The University of Edinburgh.

If you are considering recruitment of **staff working overseas** please review the Working Abroad Webpages.

Refer to the Disclosure and PVG Checks webpage and Protection of Children and Protected Adults (PVG) policy if you are considering recruitment of staff working in a regulated role with vulnerable groups including children, or who supervise people in these roles. There is also a Guide to Employment Checks to assit with this process.

Support for employees with disabilities can be found in the Reasonable Adjustments Policy At any point in the employee lifecycle The Staff Disability Advice Service (SDAS) is available to provide advice and guidance to disabled, deaf, and/or neurodivergent colleagues, Line Managers and HR. Staff can contact the service to get advice on reasonable adjustments in the workplace or information about Access to Work.

To help you use this document, check the role you have been assigned in People and Money. Line Managers will be provisioned with 'My Team' access and all Line Managers will also have Hiring Manager Access. School and Department Administrators should should have access via 'My Client Groups'. To request access to People and Money complete the People and Money Access Form and submit this via a service request using the category Enquiry>System Related>User Access New/Change.

Familiarise yourself with the People and Money User Guides for the Recruitment and Onboarding processes and check the People and Money Updates webpage.

Familiarise yourself with the different contract types the Univeristy can offer by reviewing the Contract types guidance . This includes information about annualised and fractional contracts.

Familiarise yourself with the Employee/Line Manager/SDA/HR Ops Guide to Payroll and the Guide to Casual Workers.

Familiarise yourself with the Hybrid workplace policy and Flexible working policy.

If users have any queries about a stage in this process, they should Search My Knowledge for support in the first instance. Follow the People and Money user guide 'How to search my knowledge'. If they cannot find the information they need they should raise a service request (SR), following the People and Money user guide 'How to raise and maintain a service request enquiry'. Please note it is best to contact the HR helpline by raising an SR and including any relevant attachments you might need.

Subsidiaries should refer to Appendix 1 of this document for all in scope activities.

Step 1 - Writing a Job Description and Job Grading

All jobs must have a corresponding job description that has been approved and graded.

All new jobs must be sent to HR for grading. An existing job which has become vacant must also be sent for grading if there has been a significant change in responsibilities and/or the knowledge, experience or skills needed to do the job, following the process outlined below. HR Partners will aim to grade the job within 2 calendar weeks of receipt of all the required documentation (3 weeks for Grade 10).

For advertised posts, approved Job Descriptions will need to be uploaded to the Job Description Library SharePoint to enable the advert to link to this, further information is available in Step 4e –Create Job Requisition in People and Money (for Advertised Roles).

You should include in the Job description if the role requires a Disclosure or Protection of Vulnerable Groups (PVG) Check. Further guidance is available on the Disclosure/PVG checks webpage.

Role	**Line Manager**	**Hiring Manager**	**School/Department Administrator**	**HR Business Support**	**HR Advisor/ HR Partner**
Process	If you do not have a job description that has been graded and approved by the HR Partnering team you should: 1)Write the job description using the Job Description Template 2)Allocate a UKVI SOC Code 3)Complete the Grading Request Form and submit this along with the relevant enclosures outlined on the form to the HR Business Support Team via email jobgradingrequests@ed.ac.uk	If you are also a Line Manager follow the steps for 'Line Manager' If Hiring Manager only, you should liase with the Line Manager for the vacancy to obtain the approved Job description.	1)Request the Job Description from the Line/Hiring Manager 2)Allocate a UKVI SOC Code 3)Complete the Grading Request Form and submit this along with the relevant enclosures outlined on the form to the HR Business Support Team via email jobgradingrequests@ed.ac.uk 4)Await the outcome of the Grading request before proceeding.	-Coordinate Job Grading requests with relevant HR Partners -Advise the requestor of the outcome, this will include the grading reference number, job function and job family.	-Review Job Description and Grade accordingly. -Provide guidance on UKVI SOC code allocation. --Notify HR Business Support of the outcome of the grading request, include the job function and job family.

	4)Await the outcome of the Grading request before proceeding.				

Supporting Information
Job Grading Policy
Guidance on Writing a Job Description
Grade Profiles

Step 2 - Approval to Recruit (Job Requisition Business Case)

All new or replacement roles will require completion and approval of the Job Requisition Business Case form. **This applies to all internally and externally funded posts,** see the Guide to Employment and Finance Approvals for further information. Currently all internally and externally funded posts will go to the Head of College or equivalent for approval. A school or business unit may have local (offline) approval processes prior to the People and Money approval process. For example, they may have a management meeting at which all employment requests are discussed. Hiring managers should ask their Line manager or School/ Department Administrator to find out whether local processes apply.

Role	Line Manager	Hiring Manager	School/Department Administrator	Business Approver
Process	1) Complete the Job Requisition Business Case form and save a copy locally 2) Seek off system approval (if applicable) for the post as per local arrangements You should also complete this for externally funded posts, including a copy of the grant award letter. Whilst waiting for the approval to recruit you can begin step 3 'Position Check'.			Approve in line with local process and the Guide to Employment and Finance Approvals.

Supporting Information

- Guidance – Before you create a job Requisition
- Guide to Sponsorship of Skilled Workers and Temporary Worker Sponsored Researchers.

The Job Requisition Business Case form requires a UKVI SOC Code to be included. Further guidance is available on the Skilled Worker webpage. Please note you **no longer need to supply this if you are choosing not to consider applicants that may require sponsorship for the role, please see the Guidance on How to Allocate a SOC Code within the** Skilled Worker **webpage.**

- CAH3 Code - Certain roles will also require an Academic Technology Approval Scheme (ATAS) certificate. Before submitting the Job Requisition Business Case form Hiring Managers or SDAs should check if the research activity of the role is covered by ATAS requirements. The list of subject areas can be found on the UK Government webpages under 'Academic Subjects relevant to ATAS' and against each subject area there is a short code – this is known as the CAH3 code. Further information and university procedural guidance on ATAS requirements can be found on the Skilled Worker Webpage.

Step 3 – Position Check

The People and Money system is designed around Job Classification Structures. You should familiarise yourself with the Guide to Job Classifications and Position Management which explains the job classification structure within People and Money, and how to request a new or change to position and job level. Before you complete the Job Requisition Business Case form, you must check that there is a position available in the structure within People and Money within the correct grade band and with available FTE.

The Job Level on the position should also be reviewed. It is at Job Level that we determine the level of authority as per the Delegated Authority Schedule (DAS). Job levels are applied to a job that is then applied to the position and then the employee's assignment.

This applies to **all** recruitment activity including transfers and internal secondments.

A position is:

- An instance of a job.
- A seat /slot in the organisation structure.
- May be filled by one or more people. All incumbents must have the same grade band and sit within the same department.
- Specific to an individual business unit.

Examples – Personal Chair, Manager, Research Assistant, Veterinary Nurse, Finance Administrator.

Details of how to check a **position** are held within the Guide to Job Classifications and Position Management. SDA's can view all positions wthin the structure, Line Managers have a more limited view. If you are unable to find the position within the Position Details tile, you can also establish the position number by going to My Client Groups>Person Management>Searching the person currently in post>selecting the ellipsis next to position will give you the position name and number.

There are three options:

1) **Position does not yet exist in People and Money**

In order to create a job requisition in People and Money (step 4b) you should request the position first. If the position you want to recruit for does not yet exisre;t you need to create a new position. Follow the People and Money User Guide 'How to Request a New Position or Request Position Change'

Note: When creating a new position the 'job' section refers to the type/category of job you are creating. You should choose the most appropriate category noting that each combination of letter and number refers to the grade of the post where A= grades 1-3, B= grades 4&5 C= grades 6-8 D= 9&10 and the subsequent coding refers to the type of post e.g. administration, academic, clinical etc. See appendix 3 in the User Guide 'How to request a new position or position change' for more information.

2) Position Available but requires an amendment to FTE /Grade

If the position exists in the system but does not have enough vacant FTE against it or an appropriate grade follow the People and Money User Guide 'Request New Position or Request Position Change'. It is best practice to request this before you create a job requisition, however this can be done in parallel. It must be completed before you appoint the successful candidate.

3) Position exists with sufficient FTE and appropriate Grade

If you have found a suitable existing position within People and Money, with available FTE, take a note of the position reference number and proceed to step 4 –'Check the Redeployment Register'. If an incumbent is leaving a post, their FTE will become available when they leave. There is an overlap period allowed on the same position. If the incumbent leaves before the successful candidate starts the position will remain but with a 0 FTE.

Note: If you are a large area such as a School, you may not find the post when you search using your School's name. You may have to go down to department level and enter the department that the post sits under. For example, if it is a teaching secretary you may need to search for your teaching organisation rather than your overall School to find the post.

Role	**Line Manager**	**Hiring Manager**	**School/Department Administrator**	**HR Operations**
Process	**Position does not exist** Follow the People and Money User Guide 'Request New Position or Request Position Change', attaching a copy of the **approved** Job Requisition Business Case. **Position Available but requires amendment to FTE /Grade** Follow the People and Money User Guide 'Request New Position or Request Position Change', attaching a copy of the **approved** Job Requisition Business Case. Once the request for New Position or Position Change has been reviewed by HR Operations, you will receive a system notification approving/rejecting or requesting further information as appropriate.			Review and approve or reject new position or position change request. Follow the People and Money User Guide 'How to perform position checks' and the HR Operations Internal checklist 'Position Management Checks' Note that the approved Job Requisition Business Case form should be attached the request.

	Position Exists with sufficient FTE and appropriate Grade – Note the position reference number and proceed to step 4 'Preparing to Advertise'.	
Supporting Information • Guide to Job Classifications and Position Management. • Guidance – Before you create a job Requisition		

Step 4 - Preparing to Advertise

Once you have a job description, approval to recruit, and a position available within People and Money you can then proceed with checking the Redeployment Register and advertising the role (if required). Further guidance is available on the Defining and Advertising the role webpage.

Step 4a Consideration of Hybrid Working

Before advertising, hiring managers should consider if the role is to be based on campus or open to hybrid working (combining a mix of remote and regular on-campus working). Details should be included in the positing description when advertising and the hybrid or on campus field selected when creating the job requisition. Please see the Hybrid Workplace Policy for further information.

In exceptional circumstances, managers can also agree to a flexible working request (a contractual arrangement) during the recruitment process. Please see the Flexible Working Policy for further information. Any such agreement must be detailed within the offer step or for non advertised posts at the add pending worker step outlined below.

Step 4b – Check the Redeployment Register

As part of your preparation to recruit you should check the Redeployment Register to see if there are any current employees available for redeployment. The recruitment webpages provide further detail and guidance on the Redeployment Register. Where a Research Grant specifically names the researcher the Redeployment Register does not need to be checked. An internal candidate can also note on the application what their current employment situation is. If no suitable candidates are identified or suitable from the redeployment register, you can proceed with advertising the vacancy.

Having reviewed the Redeployment Register before advertising, you must also refer to the Redeployment Register at the following stages of the recruitment process:

- At shortlisting and before inviting candidates to interview, and
- Post interviewing and before making an offer of employment.

This will ensure that you give full opportunity to all staff who become eligible to register themselves on the Redeployment Register, which may occur at any stage of your recruitment process.

Step 4c – External Advertising

Penna are the University's appointed advertising consultancy. If you wish to advertise your role externally, please read and follow the steps within the Guide to External Advertising held on the Defining and Advertising your role webpage of the Recruiters Guide (Step 5). Please note that before you submit the job requisition on People and Money you must have raised a Purchase Order (PO) and provide these details within the requisition.

Step 4d – Non Advertised roles

There are certain circumstances when advertising may not be required, namely:

- Where a Research Grant specifically names the researcher who is to be involved
- Where there has been a recent external advertisement (within the last 6 months) for a similar position
- Hiring someone for less than 6 months
- Posts being filled by NHS staff after recruitment
- Someone from the Redeployment Register is being appointed

Non-advertised roles do not need to have a job requisition on People and Money. In this scenario, any shortlisting or interviews will be arranged offline. You should proceed to Step 9 - Pre Employment Checks and then follow remaining steps to create the pending worker in People and Money

Step 4e –Create Job Requisition in People and Money (for Advertised Roles)

A job requisition either should be created when there is a vacancy for an existing job (after an employee has left the university) or for a newly created job and advertising is required and approval to recruit has been provided. The creation of the job requisition requires various sections to be completed before the requisition can be submitted for approval. It covers everything you will need to do to set up the requisition and get this ready for advertising, the final section also gives you an opportunity to select pre-screening questions for use in the online application form and to support the sifting process (see supporting information below). There is also the ability to create an interview schedule prior to the requisition being fully approved, alternatively this can be created after the requisition has been approved, please see Step 7c Interviewing below for further details. A draft copy of the job requisition can be saved at any stage and completed later.

The People and Money user guide ‘How to create and maintain a job requisition’ will guide you through each of the sections. Once recruitment is concluded, the job requisition is linked to the successful candidate record in People and Money. HR Operations and HR Systems can view this.

If you intend to advertise the role externally ensure that a Purchase Order has been raised and is included within the Job Posting Comments on the job requisition. See the Guide to External Advertising for further details. Please ensure that when providing the PO number this is in the standard format of UOExxxxxxx (7 digits).

Placing an Advert on S1 Jobs via Penna

To help candidates find University jobs advertised on S1 Jobs they can use the 'Core Skill' search functionality to help filter specific roles. When requesting to place an advert on S1 Jobs (via Penna) please provide the Core Skill (Job Category) within the Job Posting Comments field of the Job Requisition in People and Money. We have created a list that you can refer to available on the Where to Advertise webpage.

Role	Line Manager	Hiring Manager	School/Department Administrator	Business Approver	HR Operations
Process	1)Create a job requisiton completing sections 1-3 following the People and Money User Guide ‘How to create and maintain a job requisition’ Note - if the Line Manager is the same as the Hiring Manager	1)Create or continue with the job requisiton completing all sections following the People and Money User Guide ‘How to create and maintain a job requisition’. When you reach Section 10 Configuration ‘Candidate Selection Process’ you can choose whether you will want to extend an offer letter via People and Money or choose ‘Bypass Offer’ where an offer letter is not required. You should select ‘Bypass Offer’ if creating a requisition for a Secondment.		Once submitted the Job requisition will go through the approval workflow for the system and will go to the following for approval: • Line Managers Manager (following up the hierarchy) • Finance manager	1)Upon receipt of the system notification ‘FYI Requisition <Job Title> <ReqNo>Requires Approval’ Follow the People and Money User Guide ‘How to Advertise’ and the HR Operations Internal checklist ‘Checking a

	they may also complete the rest of the requisition and submit for approval. If they are not, a Hiring Manager or SDA will complete the job requisition (sections 4-10) and submit for approval.	**Once you reach section 17e of the user guide** save the requisition in draft before proceeding to the next step, **taking a note of the requisition reference number.** 2)Save the Job Description to the Job Description Library SharePoint following the [Guidance – Saving job descriptions to the job description library]() 3) Once you have received the confirmation email containing the hyperlink to the Job Description, locate the draft requisition and **copy and paste this link to the Posting Description.** You **must only use the link supplied within the email** to avoid any access issues once the advert is live. 4) In the Job Posting comments, ensure you note how long you wish the vacancy to be advertised for (start and end date/time) where the job will be advertised (e.g. S1 Jobs) and include the PO number for Penna advertising (in standard format UOExxxxxxx (7digits)). If advertising on S1 Jobs, please also provide the Core Skill (Job Category) where you want the advert to be placed under. Please note the minimum advertising duration is 14 days. You should also **attach** a copy of the	• Head of School/unit (if it is an externally funded post then the approval chain stops here) • College (if it is a core funded post) Once fully approved this will then send a notification to HR Operations for approval and posting.	Job requisition Prior to Advertising' 2)Update the requisition if notified by Hiring Manager/SDA

		approved Job Requisition Business Case form within the attachments section of the requisition. This will support HR Operations when they are checking the requisition before posting the advert to live. Note the default closing time is 11.59pm GMT, if a candidate is applying from outside of the UK the closing time on the advert will automatically adjust to their browser's local time zone. 5) Submit for Approval – this will send a notification to the business approvers. You will only receive a notification once this has been fully approved (not after each approval step). **How to Check the Requisition Approval stage** You can track how job requisitions are moving through the approval process by viewing banners displayed on the Overview and Details tabs of the Job Requisition. Job requisition initiators and approvers can also click links on these banners to get more details such as viewing the whole requisition or seeing who the next approver in the line is, and to take actions on the requisition such as approving or rejecting the requisition or requesting more information.		

		Alternatively, it is possible to review the worklist from the notifications area of People and Money. Anyone in the approvals chain can view where the requisition is. The person that raised it can see it in the **Created by Me** section whereas anyone in the approval chain can see the progress in the **All** section. Follow the steps in the People and Money user guide [– How to view and respond to notifications] for further guidance. HR systems can reassign requisition approvals if they get stuck. Note: Once it has been approved by all Business Approvers in the approval hierarchy the requisition will change to 'job formatting in progress' and a system notification will be sent to alert you this – at this stage it has been sent to HR Operations to check. At this point no changes can be made to the requisition, this can be requested by contacting HR Operations. Once it has been posted, the status changes to 'Open-Posted' and a notification will be sent to you. From January 2023, the job requisition status will automatically change to "filled" once the		

		target number of openings has been reached. If the number changes or you want to increase the openings, contact HR Operations through a Service Request using the "Advertising" category. Attach a signed JRBC (Job Requisition Business Case) for the necessary adjustments.		

Supporting Information

- People and Money User Guide – 'How to create and maintain a job requisition'
- Guide to External Advertising
- Guidance – Before you create a job Requisition
- Advertising Guidelines
- Guidance for seeking academic references – please refer to this if you are required to seek academic references as part of the recruitment and selection process.

Link to **Job Description Library SharePoint**

Cancellation of a Job requisition – (Not Posted)
If the job requisition has not been submitted for approval, it can be cancelled, and it will be deleted. If the job requisition has been submitted for approval, it can be cancelled prior to being advertised.

Cancellation of Job requisition (Job Posted) A job requisition has been created and advertised but needs to be cancelled, whether or not applications have been made. If candidates have applied to the job, they will be notified via email (manually using the interactions facility in the system) that the job requisition is no longer active.

Evaluation Criteria
Pre-screening questions and interview feedback questionnaires can be added to the job requisition when it is created. There are mandatory Pre-screening questions predefined in the system and other questions can be chosen from the question library. These allow Hiring Managers and School or Department Administrative users to sift / longlist and shortlist candidates more effectively.

- **If the role requires a Disclosure Scotland or Protection of Vulnerable Groups (PVG) check, you MUST manually add the pre screening questions relating to this to both the internal and external application. Follow the steps in the** People and Money User Guide – 'How to create and maintain a job requisition'

The **mandatory pre-screening questions added to each requisition** are:

For External Applicants	**For Internal Applicants**
-Are you a current student at the University of Edinburgh? -Please provide your student matriculation number (numbers only) -Are you currently working for the University in another capacity? -When could you start this role? -Have you worked for us before? -Do you currently have the right to work in the UK	-Will this be your only assignment or will you hold another assignment alongside this one with us? -How many hours are you contracted to work in your other assignments with us? -When could you start this role? Which best describes your current employment situation?** -Do you currently have the right to work in the UK? ** if the answer to this question is 'my role has been confirmed as at risk of redundancy' a further question will be displayed asking the applicant to inform the recruiter if they are pregnant and/or on or recently returned from family leave. Please see the section below Reviewing Answers to Mandatory Pre Screening Questions for further information.

Interview feedback questionnaires contain questions that can be used to collect feedback on candidates during interviews. New pre-screening questions or interview feedback templates can be created by the HR systems team if required.

Candidate Selection Process

When creating a new job requisition, a Hiring Manager or School/Department Administrator has to select a Candidate Selection Process (CSP) or request a new CSP to be created by the HR Systems Team if required. There is currently one CSP in the system, which takes the applicant through a set of phases and stages e.g. where they are in the recruitment process. The current CSP has one stage of interview. If an area wanted to have a two-stage interview process in the system this could be added by HR Systems. The hiring manager or SDA can request a new CSP via an SR.

Step 5 – Advertise

This step describes the process of publicising a job requisition in order to receive applications either by candidates searching for a job on a career site or by other means such as being invited to apply or being referred. Advertising includes:

- An approved job requisition on a range of career sites, including the university's internal, student and external career sites.
- Advertising Externally (using Penna to place the advert to a range of media e.g. S1 Jobs)
- Inviting candidates to apply for advertised jobs.
- Referring a candidate (internal and external)
- Recruitment Marketing campaigns

As part of our broader University wide strategy, all jobs posted on the University of Edinburgh career site are automatically advertised on LinkedIn and Indeed. Adverts are also manually placed by HR Operations on the Find a Job and Jobs.ac.uk as follows:

- For grades 1 to 5 - posted on Find a Job (previously Job Centre).
- For grades 6 and above - posted on Find a Job and jobs.ac.uk (Warwick Web).

The minimum advertising duration is 14 days.

Role	Line Manager	Hiring Manager	School/Department Administrator	HR Operations	Resourcing Centre of Excellence
Process	When creating a job requisition (in step 4c above) select the appropriate job posting requirements following the guidance in the People and Money User Guide 'How to create and maintain a job requisition'.			Once the checks in step 4c are finalised, post Advert to make it live in line with the posting and advertising requirements specified on the job requisition. HR Operations will post the job advert as per the posting requirements specified on the job requisition e.g. internal	Campaign Recruitment Only Sends out a bulk email to internal and external candidates asking them to apply for a job, refer a friend/employee or to share a no. of job adverts and track the

		only, external (includes internal), student site only and on a specified time and date. HR Operations will also post the advert with the appropriate advertising paragraph relating to sponsorship, i.e., sponsorable, not sponsorable, sponsorable with tradeable points, sponsorable but opting out. Further details are available in the How to Allocate a SOC Code Guidance. Once the job has been posted by HR Operations the status changes to 'Open-Posted'.	click-through/drop off rates.

Supporting Information
Where to Advertise
Guide to External Advertising (See step 5)
Guidance on the engagement of executive search agencies can be found on the Executive and Senior Search webpage

Referrals
Employees can refer another employee for a job or refer an external candidate (e.g. a friend). There must be a job advertised on the internal careers site in order for employees to refer another employee or a friend. . There will be no monetary reward for successful referrals.

Campaign Recruitment (Recruitment Events/Job Fairs) This relates to all aspects of sending bulk emails to internal and external candidates to notify them of a job advert posting or encourage them to refer an employee/friend.

Step 6 – Apply

This step describes the process of the overall online application process for Internal and External applicants. Internal applicants apply for advertised roles via direct access to People and Money. External candidates and students apply for advertised roles via the external careers site. In exceptional circumstances a candidate can apply offline and can be added to the requisition by the HR Helpline.

It is important that an **internal candidate applies for any jobs via the internal careers site** and by the closing date of the vacancy. This can be accessed through their direct access within People and Money by clicking on the 'Current Jobs' tile.

There is also access via the external careers site (clicking on icon at the top right-hand side of the screen titled 'I am an employee'). Or by clicking the icon Existing employee? Apply here (EASE login). Internal candidates can also watch this short video 'How to Search and Apply for Internal Jobs' for guidance.

If a current employee submits an application via the external careers site, a message will appear at the move to HR phase stating a duplicate has been found. Their application can be merged to their internal record as part of the duplicate check, performed by HR Operations at the Hire stage. However, internal candidates should be encouraged to apply by using the Current Jobs app in People and money

After submission of their online application, candidates will receive emails and notifications (if internal) as they move through the recruitment process. A candidate may withdraw their application at any time and the Hiring Manager/school department administrator will be notified of this.

Note the **default closing time is 11.59pm GMT**, if a candidate is applying from outside of the UK the closing time on the advert will automatically adjust to their browser's local time zone.

Internal Candidates

Internal candidates are encouraged to discuss any internal job applications with their line manager as part of their career development conversations. Please see the Planning your Role and Career Development webpages for further information. People and Money has been designed with this in mind and as a result, recruitment notifications are visible to line managers of the employee.

Colleagues who apply internally for a role using People and Money will automatically get notifications through the system, for example: invite to interview, a decline or offer. Your current line manager can view these notifications. This is found via the Notification>Worklist functionality and click on My Staff Tasks.

The University holds information to support, manage and keep a record of your employment, this includes notifications from internal recruitment activity as described in the [Privacy Information Notice for Staff](#).

<table>
<tr><th>Role</th><th>Hiring Manager</th><th>School/Department Administrator</th><th>External Candidate</th><th>Internal Candidate</th><th>HR Helpline</th></tr>
<tr><td>Process</td><td colspan="2">The actions at this step of the process are typically on the side of the candidate making the application, at this stage you can:

-Review Applications and update the candidate phase and state, accordingly, e.g. progressed through to longlisting or shortlisting, invite to interview, offer.

-Hiring team can add comments when moving job applications between phases and states. Please note - Under GDPR candidates can request information about their application including all notes (online and offline). Care should therefore be taken to ensure comments are in keeping with the principles of fairness, equality, dignity and respect.</td><td>1)Search for a job on the external careers site or job board, is matched to a job requisition, is referred by an employee or an agent submits an online application.

2)Register on the external careers site which will allow them to view previous or open applications.

3)Completes the online application which consists of Personal Information, Job Application Questions (if selected at requisition stage by Hiring Manager), Experience, Education, More About You (CV and Cover</td><td>1)Search for a job on the internal careers site and apply for the selected role. The candidate will complete the internal application and will be prompted to review their ‘Skills and Qualifications’ (this will be blank unless the candidate has applied for a role in People and Money previously).
2)Completes the Job Application Questions (if selected at</td><td>Offline Candidates
Upon receipt of a service request from the Hiring Manager or SDA create the candidate record and add the candidate to the requisition.</td></tr>
</table>

	-Reject unsuccessful candidates. Follow People and Money User Guide 'How to reject a candidate'. -Withdraw applications if requested by the candidate, if the candidate has scheduled an interview, the interview is automatically cancelled. -Update Applications when the candidate has already submitted a job application accepting additional documentation to support their application. This would typically be in exceptional circumstances, e.g. technical issues. Any additional documentation can be uploaded in the 'Attachments' section of the candidate record. **Offline Candidates** – There may be exceptional cases when a candidate needs to be added manually to the requisition. See supporting information below for further details.	Letter), Licenses and Certificates, Work Preferences, Languages, Sensitive Personal Information, Diversity Information and Opt In (to receive updates on job opportunities and marketing communications) and E Signature. Note that external candidates can upload a maximum of 10 attachments. 4)Once submitted they will receive a confirmation email, and the job application will be displayed against the requisition. **Follow the People and Money User Guide** 'How to apply – External Candidate'. This guide is available within the How to Apply section of the Career site.	requisition stage by Hiring Manager), upload supporting documents and provide an E Signature. 3)Once submitted the candidate will receive a notification and email to confirm and the job application will be displayed against the requisition. Watch a short video 'How to search and apply for Internal Jobs' **Follow the People & Money User Guides** 'How to apply – Employee' These guides are available on the people and Money user guides webpages	
Supporting Information				

Offline Candidates –In exceptional cases, where the online application process can't be followed, Hiring managers or SDAs need to raise a service request in order to ask HR to add a candidate to a job requisition. This may be the case where there are late external applications which the Hiring Manager wishes to consider in the shortlisting process. We expect internal candidates to apply by the closing deadline. If a Hiring Manager receives a late external application, they should consider whether the application meets the essential criteria for the role. If so the Hiring Manager/SDA should follow the process:

• In People and Money, click on 'Help desk' > 'service requests' > 'Create service request'. Choose category 'Applications'. Use 'Late application' along with the job requisition name and number in the title of your service request and include:

- Applicant's name
- Title
- Source of application, e.g.: LinkedIn, email etc
- Email address and phone number
- Their CV, as an attachment.

The service request will go to the HR Helpline team who will add the candidate to the job requisition. It will take up to 48 hours for the late application to be added.

External Candidates can update their **personal details** through the external careers site, and this will display on their candidate record in ORC. Should they wish to submit further additional attachments they must email these to the Hiring Manager or SDA.

Internal Candidates can update their **personal details** via the Self-Service transaction 'Update Personal Details' in People and Money. Should they wish to submit further additional attachments they must email these to the Hiring Manager or SDA.

Moving Candidates through the Recruitment Phases and States

To enable accurate university and statutory reporting of the recruitment process please move candidates through each phase in chronological order, for example from New to Screening to Interview to Offer. Once the successful candidate(s) have accepted their offer you should check that any remaining candidates sitting in previous phases have been moved to an appropriate end status (rejected or withdrawn, highlighted in red). Candidates can be moved to the appropriate phase and state individually or in bulk through the hiring app.

The table below shows each in system recruitment phase (stage in process) and state (step within that stage).

PHASE 1	States	PHASE 2	States	PHASE 3	States	PHASE 4	States	PHASE 5	States
New	To be reviewed	**Screening**	To be reviewed	**Interview**	1st interview to be scheduled	**Offer**	Verbal offer made	**HR**	Pending Automated Processing
	Request Further Information		Reviewed		1st interview scheduled		On hold		Pending Manual Processing
	Further Information requested		Screening to be scheduled		Assessment to be scheduled		To be Created		Error during Processing
	Under consideration		Screening scheduled		Assessment scheduled		Draft		Processing in Progress
	Selected for screening		Screening completed		Awaiting interview/Assessment outcome		Pending Approval		Processed
	Rejected by Employer		Additional assessment to be scheduled		Panel feedback requested		Approval Rejected		Rejected by Employer
	Withdrawn by Candidate		Additional assessment scheduled		Panel feedback received		Approved		Withdrawn by Candidate
			Additional assessment complete		Selected for offer		Extended		
			Progress to interview		Did not attend interview		Accepted		
			On Hold		2nd Interview to be scheduled		In negotiation		
			Selected for offer		2nd Interview scheduled		Rejected by Employer		

			Rejected by Employer		On hold		Withdrawn by Candidate		
			Withdrawn by Candidate		Reserve				
					Rejected by Employer				
					Withdrawn by Candidate				

Step 7 – Screen Applicants (Longlisting, Shortlisting and Interviewing)

Please watch this short video 'How to Sift Applications' for further information about using all features and filters to help sift applications.

Shortlisting Matrix

Once the job advert closes an **automated shortlisting matrix** will be issued by email to the named recruiter on a job requisition. This is an excel template which prepopulates the names of all candidates and their responses to the mandatory pre-screening questions (e.g. Right to Work, Notice Period) into a shortlisting matrix. This matrix can then be used by the hiring team to score and record their sift outputs and decisions for selection/Non selection. The matrix will not pick up any manually added pre-screening questions at this time.

Please note applications added to a requisition after the advert expiration date **will not** appear on the shortlisting matrix and will need to be manually added by the hiring team upon receipt.

The matrix will be sent to the named recruiter on the requisition by the following business working day (09:30am) after the job advert closes and this should be saved to the attachments section of the requisition. If for any reason this is not received, please raise a service request.

Bulk Download Applications as a PDF File

A helpful feature allows you to create PDF versions of job applications in bulk. Before you start, watch the short video 'How to download applications' for further guidance.

Select the 'Print' action to create a PDF version of job applications. On the Print Job Application page, you can select which content and attachments* you want to print. You can generate a PDF file for one or multiple job applications (in batches of up to 100).

When you use the Print action from within a job application, the PDF file is generated in real time. A new browser tab opens and displays the job application in a PDF format.

You can also use the new Print action in the application list view and select one or multiple applications. When printing this way, a PDF file is generated asynchronously as a batch. You receive a bell notification when the print is completed and will also receive a notification with a zip file containing a separate PDF for each job application.

With this feature, you can generate PDF files of job applications and share those PDFs with other users involved in the review and selection of job applications.

NOTE: Any documents added to the "Miscellaneous Documents" section are not included in the download. Miscellaneous documents will need to be downloaded separately. There a no current plans by Oracle to include Miscellaneous documents in a future release.

***For Internal Candidates only* the print action will only include the most recently uploaded document.** When internal candidates apply, they add documents in the "Supporting documents" section of the online application. By default, any documents added to this section are categorised as "resume". If they attach separate documents for a CV, Cover Letter and other supporting information then only the most recently uploaded document is available to download within the bulk print action. However, if more than one document was added by candidates these can still be viewed and printed separately within the Hiring application by navigating to the Attachments section.

Additional instructions have been added to the internal application screens advising staff to upload their CV, Cover Letter and any other supporting documents as a single file. We have also updated the guidance to reflect this and have raised a product enhancement request with Oracle. Please note **this does not affect external candidate applications**.

Reviewing answers to the Mandatory Pre screening Questions

Hiring Teams should review the answers to all mandatory pre screening questions.

To support legislative changes regarding Extended Additional Redundancy Protection (Pregnant and Family Leave Employees) effective from 1st April 2024, if the applicant selects that their employment situation is at risk of redundancy a further question will be displayed asking the applicant to inform the recruiter if they are pregnant and/or on, or recently returned from family leave. The question is asked because the University has a legal responsibility to ensure priority status is given to those at risk of redundancy and also either pregnant and/or on, or recently returned from family leave (e.g. maternity, adoption/surrogacy or shared parental leave.

For support on how to progress these applicants if the answer is “Yes”, please review the Redundancy Policy and if applicable the Ending of Fixed Term Contracts and Restricted Funding Contracts policy.

Disclosure of Criminal Records

Where a role requires a Disclosure or Protection of Vulnerable Groups (PCG) check, recruiters should have added the pre screening questions relating to this at the Job Requisition stage (Step 4 above).

Recruiting Managers are encouraged to check for these responses. Further guidance on this is available on Recruiters Guide webpage under the heading of Step 4: Interview Pre-Employment Checks. Please also see the Recruitment of Ex Offenders Policy Statement.

7a – Longlisting

This step describes the process of assessing candidate responses to pre-screening questions, allocated at the Create Requisition Stage (4b). It includes progression through to the next stage of the recruitment process (screening, shortlisting or interview) or rejection of the application. It is the initial sift of applications. This step can be bypassed if not applicable and you can move straight to shortlisting.

Role	Hiring Manager	School/Department Administrator	Collaborator	Candidate

<table>
<tr>
<td></td>
<td>Assess the candidate responses to pre-screening questions and progress them (or not) through to the next stage of the recruitment process. The next stage can be:
• Screening (e.g. telephone interview)
• Shortlisting
• Interview
• Rejection

Follow the People and Money user guides
• ‘How to review Candidates to Longlist or Shortlist’.
• How to reject a candidate’.</td>
<td>Reviews applications and provides input into the longlist.

Note a collaborator role can only be provisioned to someone at Grade 7 and above. You can request access by submitting a service request ‘Add Collaborator Role’</td>
<td>Receives a rejection email (or notification if internal) if unsuccessful at this stage.</td>
</tr>
<tr>
<td colspan="4">Supporting Information
• Collaborators - Where a collaborator is a Grade 7 or above, they should already have the hiring app within People and Money. If an employee is a Grade 6 or below, and needs to be part of a panel, then you need to submit a service request to ‘Add collaborator role’. Once you have this access, select ‘Interview’ as the category and add ‘Add to interview panel’ in the title field. Please ensure you make this request as early as possible so it can be set up in advance of your interview panel meeting.

Non-Line Managers who require Hiring Manager access should also submit a service request to have their access provisioned.</td>
</tr>
</table>

7b – Shortlisting

This step describes the process of reviewing candidate applications and any additional attachments to assess how well the candidate meets shortlisting criteria. Candidates who meet this criteria progress to interviewing and those who do not are rejected.

Role	Hiring Manager	School/Department Administrator	Collaborator	Candidate

Process	Receive the shortlisting matrix by email (sent to named recruiter) and save a copy of the shortlisting matrix to the attachments section of the requisition, further guidance and an example shortlisting matrix is available on the Shortlisting Applications webpage. Assess the candidate application against the shortlisting criteria which should have been prepared in advance. You should also refer to the Redeployment Register at this stage. The candidate can then either be progressed to the next phase ‘Interview and Selection’ or rejected. Once the candidate has been moved to ‘Interview and Selection’ the state automatically updates to ‘Interview to be Scheduled’ and the Hiring Manager or SDA will receive a notification. Follow the People and Money user guides • ‘How to review Candidates to Longlist or Shortlist’ • How to reject a candidate’	Reviews applications and provides input into the shortlist	Receives a rejection email (or notification if internal) if unsuccessful at this stage.

Supporting Information

- **Collaborators** – Where a collaborator is a Grade 7 and is a line manager, they should already have the hiring app within People and Money. If an employee is below a Grade 7 and not a manager, and needs to be part of a panel, then you need to submit a service request to ‘Add

collaborator role'. Once you have this access, select 'Interview' as the category and add 'Add to interview panel' in the title field. Please ensure you make this request as early as possible so it can be set up in advance of your interview panel meeting.

7c - Interviewing

This step describes the process of scheduling interviews for candidates successful at the shortlisting step above. It involves interview preparation and scheduling, sending email invitations, preparing documentation before the day of interview and collecting feedback from panellists after the interviews have taken place. Interviews can be face to face, via telephone or video call (using Zoom/Microsoft teams).

In People and Money, all interviews must be created from the template. The benefit of this is that standard information can be populated for all interviewees before the schedule is created or individual invites are sent.

There are two types of interviews:

- Hiring Team Managed (where a specific interview time and date is sent).
- Candidate Managed (candidates choose a time from interview slots that have been set up).

Each interview type has different templates for the following interview formats of in person, phone or web conference. Full guidance on how to schedule interviews is available in the following user guides:

- Hiring team - How to schedule and manage hiring team managed interviews
  or
- Hiring team - How to schedule and manage candidate managed interviews

Role	Hiring Manager School/Department Administrator	Interview Panel Collaborator	Candidate
Process	**Preparation** • Book Rooms/Plan Zoom/Teams Call for interviews	**Preparation** • Prepare the Interview questions to be asked, see the Assessment Methods webpage.	• If the interview is candidate managed they will pick an available timeslot

	• Identify and book time for Interview Panellists • Prepare any Interview Documentation (e.g. maps of interview location, information on any asks of the candidate prior to or during the interview • Seek references (if applicable) • Prepare Candidate CV's and any relevant documentation for the interview panel • To support Interview Panellists with the preparation of interview questions see the Assessment Methods webpage. **Scheduling** **Follow the People and Money User Guides** • Hiring team - How to schedule and manage hiring team managed interviews or • Hiring team - How to schedule and manage candidate managed interviews **On the Day of Interview** • Collect any additional documentation provided by the candidate **After the Interview** Requests interview feedback from the interview panellists using People and Money. They will receive a notification when the feedback has been completed by the panel. Follow the People and Money User Guides	• Review the Candidate CV and Additional Documentation from either the Outlook Invite or the Job Submission record in People and Money. **On the Day of the Interview** • Interviews Shortlisted Candidates • Collect any additional documentation provided by the candidate • Completes the Interview Documentation **After the Interview** • Receives a notification to complete the interview feedback request in People and Money	• If the interview is hiring team managed the candidate will be given a specific timeslot and should respond by email to confirm attendance. • Attends the interview and provides relevant supporting documentation • Receives a rejection email (or notification if internal) if unsuccessful at this stage. • Requests Additional Feedback if unsuccessful • Attends additional interview if required Internal Candidates can follow the Employee Guide 'How to Manage Interviews' for further information.

	• '[How to Upload Interview Documents'] • '[How to Request Interview Feedback]' • Provides Feedback to unsuccessful candidates • Set Up additional interview as required • You should also refer to the Redeployment Register upon completion of interviews and before you make any offer of employment. • **Update the candidate state as appropriate**		

Supporting Information

- **Academic Selection Toolkit**
- **References** Some roles require the Hiring Manager or SDA to obtain references for the interview process. References can be requested by email, using the standard reference request template available on the making the appointment webpage. People and Money will generate a report to provide reference details to recruiters named on a job requisition. The report is automatically generated for candidates that are set to the interview or offer phase and a fresh report is sent twice weekly at 8am. Once the references have been obtained you can add these to the candidate's record – follow the People and Money user guide 'How to add references to a candidate record'. If the candidate is successful you will need to upload the references to SharePoint as part of a pre-boarding task (Step 11). There are situations where individuals are named on grants and references would not be requested (approval of the person is part of the grant application). This is not an issue from a system perspective.
- **Interview panel includes external (non-employee) panel members** - To allow them to view any applications you should download the CV, Cover Letter and any other attachments. For other information contained within the application (e.g. answers to pre-screening questions) you will need to take a screen shot of this.
- **Collaborators** - Where a collaborator is a Grade 7, they should already have the hiring app within People and Money. If an employee is below a Grade 7, and needs to be part of a panel, then you need to submit a service request to 'Add collaborator role'. Once you have this access, select 'Interview' as the category and add 'Add to interview panel' in the title field. Please ensure you make this request as early as possible so it can be set up in advance of your interview panel meeting.
- **Interview Expenses -** Candidates may be eligible to claim Interview Expenses by completing a Non-Staff/Student Expense Claim Form. Further information is available within the claim form available on the HR A-Z Forms webpage (under 'I' for Interview Expenses).
- **Right to Work Documents Required –** information is available on the Right to Work Checks Webpage

Step 8 – Make an Offer

This step describes the process of making an offer of employment to the successful candidate(s) following the selection process. Offers of employment are typically made verbally in the first instance by the Line Manager or Hiring Manager, and followed up with a written offer letter, using the offline interim process. **For non advertised positions** the offer letter should also be extended offline. Please ensure that any position changes are made prior to the job offer being drafted.

Right to Work in the UK

The University has a legal obligation to ensure that we hold Right to Work (RTW) documentation for all new starts before their first day. Failure to do so means that there is the potential for the University to employ an illegal worker. There are serious penalties for not complying with the legislation. To ensure we hold the necessary RTW documentation before an individual starts work, under usual circumstances this is taken at interview. The check must be undertaken for successful candidates at the earliest opportunity after interview. This allows the documentation to be reviewed as part of the offer process and ensures that any necessary action, e.g. undertaking a UKVI employer check or resolving issues with the documentation, is carried out prior to the person starting work. If the individual you wish to make a job offer to does not have a current entitlement to work in the UK, the University may be able to apply for a certificate of sponsorship to employ the individual. Further guidance is available within the Guide to Sponsorship of Skilled Workers and Temporary Worker Sponsored researchers (under the recruitment and onboarding heading) and on the University Sponsorship webpages.

Further guidance and the Right to Work Checklist can be found on the universities Right to Work webpages.

Offering an additional post

You must check whether the candidate is planning on continuing employment, either at the University or elsewhere, if they accept the offer you are making. This is an important check because there are regulations on how many hours employees can work per week and the rest periods they are entitled to under the Working Time Regulations. If the candidate already has an existing role at the University, consideration must also be given to whether any overtime payments are required. For example, overtime will apply if an employee is UE01 – UE05 and works in excess of 35 hours per week across multiple University posts. Hours up to 37 per week (Monday to Sunday) are paid at ‘plain-time’ and hours above 37 at ‘time and a half’ (or equivalent time off in lieu). For more information on this, please see the relevant Conditions of Service.

Offering a Post - Hybrid or Flexible Working

Any agreement to an **informal** regular work arrangement e.g. to work from home on set or part days every week at the point of offer do not need to be included within the offer letter or subsequent contract. Hybrid Work arrangements are informal and are not permanent nor contractual. Please refer to the Hybrid Workplace Policy and Guidance for Managers for further details.

If the candidate requests a **permanent** working arrangement, for example, set days or hours working off campus to support caring responsibilities or as a reasonable adjustment, this can be agreed at the offer stage. Please refer to the Flexible Working Policy for further details. Flexible Working Arrangements are contractual and therefore the agreed working arrangements should be documented within the offer letter and contract.

Offering a Post where Protection of Vulnerable Groups (PVG) Check is required

From 01 April 2025, it will be an offence for the University to offer any type of regulated role prior to receiving a PVG certificate, unless the offer of employment is made subject to receipt of a valid PVG certificate. The offer letter must include the relevant subject to paragraph relating to PVG checks (this is included in all templates for inclusion as needed). Furthermore, HR Operations will not issue a contract until the PVG Check has been confirmed as satisfactory.

Please also consider any managers who may need a PVG certificate because they supervise someone in a role that works with vulnerable adults or children.

Further information is available on the Disclosure and PVG Checks webpage and within the Protection of Children and Protected Adults (PVG) policy.

Relocation Support

Relocation support is available for eligible new starts through our Relocation Service provider, HCR. Details of eligibility criteria and relocation packages can be found in the Relocation Policy.

Full details of how request relocation support can be found within the Request Relocation Support webpages.

Role	Line Manager	Hiring Manager	School/Department Administrator	HR Operations	HR Advisor/ HR Partner	Candidate

Process	Prior to making an offer please refer to the Redeployment Register. 1)**Line Manager/Hiring Managers. Make a Verbal offer** to the successful candidate, reinforcing at this stage that any offer is subject to the candidate demonstrating their right to work in the UK/having the necessary visa to take up the job offer. It is also subject to satisfactory references being obtained and where applicable additional pre employment checks for the role (e.g. PVG/Disclosure check). This should also be included in the offer letter created for People and Money, using the offline interim process (point 2) below. **Setting a reasonable start date should also be considered if a visa application is required. In the case of a University sponsored visa, it can take up to 9 weeks for the complete process, i.e. from requesting and assigning the Certificate of Sponsorship to the visa being granted.** 2)Request Right to Work Documents from the successful candidate(s) and conduct the appropriate Right to Work checks upon receipt. 3a) Draft the Offer Letter using the appropriate offline template including the relevant 'subject to' clauses applicable to the job, e.g. PVG check, details of agreed flexible working arrangements (as per the Flexible Working Policy) and any allowances. Consideration must be given as to whether the person you are offering the position will require an ATAS certificate, (sponsored employees, i.e. those on Skilled Worker/Temporary Worker Sponsored researcher (formerly Tier 5) visa, and visiting researchers). Inclusion of this information in the offer letter is important (and is provided on the templates). Further details of this can be found on the following webpage - https://www.ed.ac.uk/human-resources/international-staff-work-uk/additional-permission-work/university-sponsorship/skilled-worker.	Upon receipt of the People and Money Notification 'Action required: Job Offer Requires Approval': 1)Carry out the 'Before Offer Check' process following the People and Money user guide 'How to Conduct Job Offer Checks' Escalate any issues to the HR Partner. 2)Check the attachments (offer letter and job description in candidate facing documents) and **Approve or Reject the Offer in People and Money. (This then sends a notification to the SDA/Hiring Manager to extend the offer).** **Note- check that any Allowances have been included in the offer letter.**	Provide advice and guidance on progression of offer if HR Operations raise an issue with the 'Before Offer Check'.	Provide evidence of Right to Work in the UK. Accept, Reject or Negotiate Job Offer Internal Candidates will receive a notification that a job offer has been extended. External Candidates will receive an email to alert them to the job offer.

	3b) If applicable issue the supplementary ATAS letter to the candidate advising them of the next steps they need to follow. 4) Follow the People and Money User Guide 'How to Create and Manage a Job Offer' and complete all sections of the 'Create Job Offer' grid. Submit for approval to HR Operations. (See below for additional information regarding Internal Secondments). A **Default Expense Account Code** must be entered or reviewed, please follow the guidance in the above user guide for further information. (Note this is required to ensure that employees can submit expense claims in the future). **Personal Job Title -** please review this as this will default from the position name, this should be updated to something more meaningful. **Flexible Working** - If you have agreed during the recruitment process to the employee working set days off campus or in exceptional circumstances 100% off campus working under the Flexible Working Policy, the relevant fields must be completed on the offer grid. When you reach the 'Assignment Info' section please update the fields titled 100% off campus working (Yes or No) and Off Campus Working Days (Approved Flexible Working only), providing the days of the week the employee will be working off campus. 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). ****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****.	Note - HR Operations can re-advertise the job requisition if the appointable candidate rejects the offeroffer and there isis no reserve candidate (at the request of the Hiring Manager or School/Department Administrator).		

	Review the Offer team at this point, offer team members are automatically populated with the Hiring Manager, Recruiter and Offer Specialists that were added when the requisition was set up. Offer team members will receive notifications and have access to offer information such as salary. **You must therefore review and remove any members at this stage who should not have access to this information.** **Note – It is only the recruiter, hiring manager or offer specialist within the hiring team that can submit/edit an offer.** For any offers that were raised prior to the 22C update (prior to 24 October 2022) the recruiter that raised the original offer can update the offer team ('add collaborator type') and add the offer specialist role to those who need it. If you experience any problems updating the offer team you should submit a service request>system related providing the requisition number. **IMPORTANT** – please ensure you **complete the mandatory 'Payroll Info' section of the offer grid to prevent issues later in the process with candidates not being able to add their bank details (and prevent them from being paid).** Select 'University of Edinburgh' as the Tax reporting unit **and** Select 'UOE Group Payroll' in the Payroll Frequency. Please use the **'Comments and Attachments' section** to provide any additional useful information to support the request. The information in this section will be visible to the internal users but not to the candidate. At the **'Other Compensation'** section of the offer grid, you will now be required to add any employment allowances which you might be offering the candidate. There are 14 allowances you can select and there is full guidance on what you need to enter. If the allowance isn't listed this should be noted			

	within the comments field. All allowances should be manually added to the offer letter. **Note** that the offer letter must be drafted offline and should include relevant subject to clauses and allowances applicable to the job, subject to clauses are the pre employment checks that the candidate must satisfy in order to be successfully appointed to the role. See the standard offer letter templates. **The Offer letter and Job Description must be attached** within the new section 'Offer letter' and added to the 'Candidate Facing documents. **SDA/Hiring Manager** - The Job Requisition Business Case form can be added at this stage to the Comments and Attachments 'Internal Documents' section – this will enable this to be saved to the Document Record once the candidate is hired. **IMPORTANT** – Please note that the file name of any attachments added to either the candidate facing or internal documents **must not exceed 75 characters (including spaces)** as we have discovered that this is causing some records to fail during the HR processing stage. This may mean you need to rename the files before attaching. HR Operations will reject the offer if the character limit exceeds 75. 5)**Await Notification of Approval** or rejection from HR Operations. **'Approval Rejected'** notification received - you will need to redraft the offer and resubmit to HR Operations. **'Offer Approved'** If the offer has been approved by HR Operations you will receive a notification **and you will need to extend the offer to the candidate**, following the details in the People and Money User Guide 'How to Create and Manage a Job Offer'			

	This offer validity depends on the expiration date set on the offer grid, it is advised that this is no longer than 30 days and reminders are sent to the candidate at regular intervals. You will receive a notification of the offer acceptance, rejection or if the candidate wants to negotiate the offer. Any offer negotiations are carried out offline. You should redraft the offer if the candidate has successfully renegotiated. Once the offer has been accepted and the 'Move to HR' step has been performed (See step 10 Hire) the offer documentation automatically saves to the individuals Document of Records. If there is not a successful candidate the job can be re advertised by contacting HR Operations by raising a service request enquiry.			
	Internal Secondments Please consider and action accordingly for internal secondments: **Single Assignment or multiple assignment holder moving <u>in full</u> to Secondment** Please note that the assignment category field on the offer grid is 'Secondment' and the action in the 'When and why' section is <u>'Secondment'.</u> **Single Assignment moving <u>in part</u> to secondment and retaining time in substantive post OR Multiple Assignment Holder moving from one assignment <u>in part</u> to Secondment** In this scenario, please note that the assignment category field is 'Secondment' and the action in the 'When and why' section is 'Add Assignment'.			

	In the 'Comments and Attachments' section please provide the following information: -If multiple assignment holder provide the assignment number of the job they will be seconded from -Will the employee be fully seconded or partially seconded (retaining some hours in their substantive role). -If retaining hours in substantive role, what are the details of this e.g. work schedule. - If the secondee has a current flexible working arrangement will this continue, end or will there be any changes to their hours, work pattern or location? Please note any amendments in the comments. -Whether any other changes to their terms and conditions are required -If the secondee will return to their substantive post at the end of the secondment period. -Will the person be working abroad, or the role require overseas working.			

Supporting Information

Guidance for Job Offer Interim Solution

Here is the suite of standard offer letter templates.

Allowances within the 'Other Compensation' Section of the Offer Grid:

Acting Up Allowance
Contractual Overtime
Deans Honorarium
Head of School
London Weighting Allowance
On Call Payment
Overseas Supplement
Premium Band Payment
Responsibility Allowance
Royal Society Award

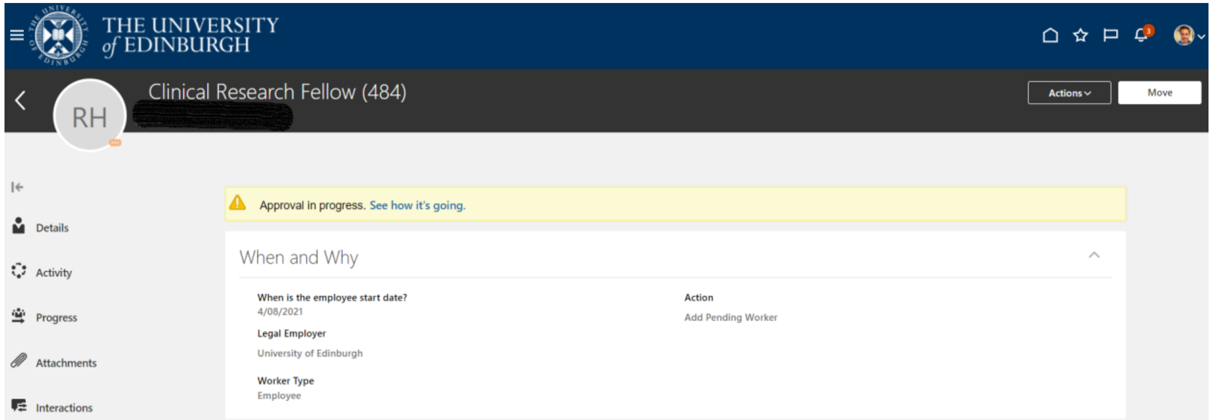
Secondment Allowance
Wardens Allowance
Wellcome Trust Allowance
Wellcome Trust Fellowship

Tracking Job Offer Approval

Job offer initiators, approvers, and observers can track how job offers are moving through the approval process by viewing banners displayed on the job application's Details and Offer tabs. Job offers initiators and approvers can also click the "see how it's going" link on these banners to get more details, such as viewing the whole offer or seeing who the next approver in line is. They can also take actions on the offer such as approving it or withdrawing it from approval.

Banners are displayed when:

- An offer is submitted for approval.
- An offer approval is underway.
- An approver requested more info about the offer.
- The offer initiator needs to provide more info about the offer.



Offer Approval in Progress Banners are also displayed on the job application's Details and Offer tabs when:

- An offer is extended.
- An offer will be extended at a certain point in the future, if the selection process is configured to automatically extend job offers.
- There are any issues while trying to extend an offer.

- There are any issues while using the Move to HR action.

The job offer couldn't be extended.There was a problem with the job offer letter. (IRC-1590302)

The Before Offer Check Process covers on system steps and also a series of offline checks, namely:

- Check to confirm if the candidate has been previously employed by the University and if so, are they recommended for rehire (including settlement agreements)
- Check hours of work do not exceed any visa restrictions or work hours limit for student work hours
- Check Right to Work documentation

Information for candidates regarding ATAS requirements can be found on the University Sponsorship webpages.

Step 9 - Pre Employment Checks

This step describes the process for and obligation of Line Managers to carry out the appropriate pre employment checks for new hires and rehires. This must include checking the candidate's Right to work in the UK and obtaining references. There may be other specific pre employment checks that need to be carried out and this is dependent on the job the successful candidate will be doing. This should have been outlined to the candidate at the offer stage, examples are Protection of Vulnerable Groups (PVG) check, proof of a satisfactory Disclosure check or Specialist GMC registration.

From 01 April 2025, it will be an offence for the University to offer any type of regulated role prior to receiving a PVG certificate, unless the offer of employment is made subject to receipt of a valid PVG certificate. HR Operations will not issue a contract until the PVG Check has been confirmed as satisfactory. Further information is available on the Disclosure and PVG Checks webpage.

Right to Work checks should be carried out as soon after interview as possible and this is covered in Step 8 -Make an Offer

Certificate of Sponsorship

If the candidate you have offered requires a **Certificate of Sponsorship (CoS)** there are specific steps to follow, outlined in the Guide to Sponsorship of Skilled Workers and Temporary Worker Sponsored Researchers . Once the offer has been accepted and the pending worker record is fully approved the candidate must have a Skilled Worker – Certificate of Sponsorship Journey **manually assigned** in People and Money (if a new out of country CoS is being applied for). To do this please follow the steps in the Line Manager or SDA Guide to Journeys.

Other Pre Employment Checks are typically carried out off system and therefore can be carried out in parallel with the next on system steps of 'Hire' (Step 10).

Role	Line Manager	Hiring Manager	School/Department Administrator	HR Operations	Candidate
	Right to Work If not completed already request Right to Work Documents from the successful candidate(s) and conduct the appropriate Right to Work Checks upon receipt and upload to Document Records. **References** – Two written references are required, one must be from the candidates most recent employer. For Academic staff, the second reference can be from someone else directly involved in the candidates' field from a different institution. To enable the process of gathering references, People and Money will generate a report to provide reference details to recruiters named on a job requisition. The report is automatically generated for candidates that are set to the interview or offer phase and a fresh report is sent daily at 8am. References can be requested by email, using the standard reference request template available from the making the appointment webpage. Please review the Disclosure and Risk Assessment webpages for support with all PVG/Disclosure Checks and to read the end to end guide. For NHS Honorary Cover please see the webpage NHS Honorary Cover Documents & Guidance | The University of Edinburgh			Check RTW documents	Provides supporting information to support pre employment checks needed for their role.

Supporting Information

- Further information on the types of roles the University can sponsor and the UKVI criteria can be found on the University Sponsorship webpages
- Temporary Worker Sponsored Researcher (formerly Tier 5) Certificate of Sponsorship Application Form is held on the Tier 5 Sponsored Researcher webpage under the section 'Requesting a Certificate of Sponsorship'
- Skilled Worker Certificate of Sponsorship Application Form is held on the A-Z HR Forms webpage

- University of Edinburgh Staff Immigration Service

Step 10 – Hire

This step describes the process once the candidate has accepted the job offer and involves creating their record in People and Money. This step should be completed as soon as the acceptance is received to allow for preboarding and onboarding activities to commence. This process applies to all new hires and rehires and includes internal candidates who are transferring to a new role, taking on an additional post or an internal secondment. Full details of preboarding and onboarding activities are detailed in step 11 onwards.

Important if the requisition is set to 'Autofill', then once the number of hires equals the number of openings, the job requisition will automatically fill and become inactive. This will update the status of all other active applications to Rejected by Employer. However, the same as when you manually change the status, it will not send out a message to the candidate(s). You should still complete this action. However, be aware that if the candidate logs into their online profile they will be able to see their application has been unsuccessful, so it's important you send a message as close to the status change as possible, so they receive a communication letting them know.

The type of hire will determine the process steps to follow, and these have been split between Advertised Posts and Non-Advertised Posts and whether the hire is new to the university, a rehire or is an existing employee (transfer, additional post or internal secondment). This process applies to all types of hire including those taking up a Guaranteed Hours, Annualised or Fractional Contract.

Incoming secondments (from an external organisation) will largely be handled in the same way as any other recruitment. In most cases they will apply to a job and are appointed but issued with a secondment agreement instead of an employment contract. An HR Advisor/ HR Partner should be involved at an early stage for this scenario. Further information is available within the Secondment Policy. Any external incoming secondments that are **not** being paid by the university but require access to People and Money for their role should be set up as a contingent worker in the system.

Casual Workers, External Examiners, Intermediary Workers and Taxable Scholarships have a record in People and Money with a worker type of Employee Casual.

Please read the Guide to Casual Workers to help you understand how to manage casual workers, external examiners, taxable scholarships and intermediary workers **who are offered a job within the University as an employee** and employees who may complete some casual work.

10a - Advertised Posts through People and Money

<table>
<tr><th>Role</th><th>Line Manager</th><th>Hiring Manager</th><th>School/Department Administrator</th><th>HR Operations</th><th>Candidate</th></tr>
<tr><td>New Hire/Rehire or External Incoming Secondment paid by UoE.</td><td colspan="3">1)Once the Offer has been accepted, update People and Money to move the candidate to HR for processing following the People and Money User guide ‘How to hire an external candidate’, the candidate will become a ‘Pending Worker’ once this step is complete.

In some instances when the ‘Move to HR’ action is completed after an offer has been accepted you may get a message ‘HR Error in Processing’. The below ‘HR Error in Processing/Duplicate Records’ section will provide further details and the steps a line manager/SDA can follow to support the resolution.

In the scenario where a casual worker is being hired as an employee, HR Operations will notify you should you need to continue by following the ‘How to Add a Pending Worker’ process. Further guidance is available in Guidance for Casual Workers.

2)An onboarding Journey for the new hire or rehire will be automatically assigned. If the new hire requires a Certificate of Sponsorship (CoS) for a new out of country application, you must manually assign the Skilled Worker-Certificate of Sponsorship Journey. For further information and guidance follow the Line Manager or SDA Guide to Journeys.

The pending worker will become an employee on their start date.</td><td>Review any duplicate notifications and resolve any HR Error in processing messages and merge the record where appropriate. Note you must check worker type.

Refer to the Guidance for Casual Workers if the candidate is a casual worker with an active assignment</td><td></td></tr>
</table>

Internal Transfer/Additional Post/Internal Secondment	1)The candidate will move to HR automatically upon acceptance of the job offer. 2)You will receive a notification once HR Operations have actioned this request and approved or rejected this. 3) The Getting Started in a New Role Journey will be automatically assigned. • As the new SDA or line manager, you can't see the employee within your Area of Responsibility (AOR)or team structure in People and Money until their start date. • **When the Journey is assigned before the start date this will assign tasks to the successful candidate's current primary assignment line manager and representatives (SDAs).** It is therefore important that the employee has discussed their intentions with their manager(s). • Before day one the tasks must be reassigned to enable the new line manager / SDA to complete the appropriate onboarding tasks. For further information and guidance follow the Line Manager or SDA Guide to Journeys. 4)Proceed to Step 10 'Preboarding' In some instances when the 'Move to HR' action is completed after an offer has been accepted you may get a message 'HR Error in Processing'. The below **'HR Error in Processing/Duplicate Records'** section will provide further	Receive FYI Notification - 'Assignment is complete for [candidate name] for job offer [job title]' Check the 'Manage Job offer' tile in People and Money for new requests	

	details and the steps a line manager/SDA can follow to support the resolution.		

Supporting Information
Duplicate Checks
A duplicate check is completed for every hire and is based upon a number of personal identifiers, for example name, date of birth, national insurance number, email address.

A copy of the JRBC can be attached the candidates Document Record, this can be added manually following the People and Money User Guide How to search, view and upload employee data'

HR Error in Processing / Duplicate records

In some instances when the 'Move to HR' action is completed after an offer has been accepted you may get a message 'HR Error in Processing'. The message is typically displayed when a job offer encounters a mismatch or problem when processing hire. Errors typically occur due to one or a combination of the following:

1. The character limit of the files added to the offer grid exceeds 75 characters
2. A current employee applied for the vacancy via the external careers site using their personal email address. This results in a duplicate warning message once the Move to HR action is completed.
3. A previous employee has been successful (rehire). This results in a duplicate warning message once the Move to HR action is completed.
4. Information has been changed between the time the offer was extended and now, for instance the work location became inactivated, or the relevant position became filled or frozen.
5. The person you want to offer/hire has an active casual worker assignment – please read the Guidance for Casual Workers.

The person that executes the 'Move to HR' action will be informed of errors during processing and that HR Operations will need to resolve it. Any errors are shown in a section named 'Errors' on the candidate's Job Offer page, visible to both the recruiter in the Hiring app and HR Operations from 'manage job offers'.

If the corrective action taken by HR Operations is successful for an external candidate, then a pending worker will be created and the state will become Processing in Progress until the new pending worker is converted. If the corrective action is successful for an internal worker, the state will become Processing in Progress until the internal workflow (e.g. Add Assignment) is completed by HR Operations. Appendix 2 provides further details of the HR Phases.

Candidates that have applied for a job via an advertised post

HR Operations will investigate errors on an individual basis, and may need to work with the school or department to remedy any gaps/issues. In certain circumstances HR Operations may need to withdraw the offer which will send a notification to candidate, Line Manager and SDA. Candidates must be advised of this first and the reasons for it.

Once HR Operations have reviewed and merged the duplicate records they will notify the SDA/Line Manager the offer will move back to the 'draft in progress' state. This is so that another offer can be selected if needed e.g. internal offer.

The SDA/Line Manager should then review the previously entered offer details by selecting 'Edit Offer'. Please select the appropriate internal action (e.g. Add assignment; transfer) and resubmit. You will receive a message 'The offer for the candidate not retained in the merge was already moved to HR'. You can bypass this process now for the candidate and move directly to HR.

Click 'Yes' and this will avoid another offer being sent or approvals being required.

This will then move the candidate to HR Operations once more. HR Operations will process the appointment and the state will become 'Pending Manual Processing'.

10b - Non-Advertised Posts

Role	Line Manager	Hiring Manager	School/Department Administrator	HR Operations	Candidate
New Hire/Rehire or External Incoming Secondment paid by UoE	To create a pending worker record for non advertised posts you should follow the steps below: 1)Send the Appointee Information Form (AIF) to the candidate for completion (offline). 2)Manually create the pending worker record following the People and Money user guide '[How to Add a Pending Worker'](),			Review the notification 'Add Pending Worker' and conduct Before Offer Checks. If a potential duplicate record is identified, merge the external candidate	Completes the Appointee Information Form (offline) and returns to the requestor.

	the Job Requisition Business Case form should be attached to provide evidence of budgetary approval. A duplicate check will be carried out once the personal details are added. If matches are found the SDA/Line Manager will be presented with the potential matches on screen. ****Important Checks to Carry Out**** If upon selecting a record you are informed "The selected person has an active assignment of this type with this legal employer" **it means the person is already an active employee or casual worker**. If this happens you should check the person type field: **2a) 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 an 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 within the user guide 'How to Add a Pending Worker'. 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	record with the employee record which then enables the correct action to be selected. Refer to the Guidance for Casual Workers the candidate is a casual worker with an active assignment. Check Job Requisition Business Case form is attached to the request Approve or reject the 'Add Pending Worker Request'	

	number, please request this from the candidate before proceeding. **OR** **2b) 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.** **Await HR Operations to amend the termination date before** continuing with add pending worker process, selecting the match to merge with existing record. Please select the Action 'Add Pending Worker Relationship'. Note - 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 in this scenario you do not need to submit the Service Request to reverse the casual termination date. Please refer to the Additional Guidance when hiring a casual workers, external examiner, intermediary workers or taxable scholarships as an employee available in the Guide to Casual Workers.		

	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. If there is no match select "No match, add person" and continue with the add pending worker process. Selecting a match will take you through to Create Work Relationship workflow. **Important Information to Add** **Ensure that when following the 'Add pending Worker' process that:** **- Preferred Name field** should be added as per their 'First Name' **Personal Job Title** - please review this as this will default from the position name, this should be updated to something more meaningful. **-You add the personal email address** of the candidate to the work email and personal email fields - A **Default Expense Account Code** must be entered, please follow the guidance in the 'How to Add a Pending Worker' user guide for further information. (Note this is required to ensure that employees can submit expense claims in the future). **Flexible Working** - If you have agreed during the recruitment process to the employee working set days off campus or in exceptional circumstances 100% off campus working under the Flexible Working Policy, the relevant fields must be completed.		

	When you reach the ‘Employment Details’ section please update the fields titled 100% off campus working (Yes or No) and if applicable Off Campus Working Days (Approved Flexible Working only), providing the days of the week the employee will be working off campus. 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). ****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****. **- Tax Reporting Unit and UoE Group has been added under the mandatory payroll section – this is really important and will prevent issues with the candidates not being able to add their bank details (and prevent them from being paid).** Follow the instructions in the ‘How to add a pending worker’ user guide (section 14, page 2 and section 13, pages 15-16); specifically: • In the ‘Payroll Details’ section, set the ‘Tax Reporting Unit’ to ‘University of Edinburgh’ and against ‘Payroll Frequency’ select ‘UoE Group’ under ‘Payroll’. **Please also ensure that:** **- the Position code has been added** **- the Fixed Term reason code is included Fixed Term is added in the Assignment Category field** **If Guaranteed Hours that this is included in the worker category (GH or GH Summer)** **-Any allowances are added to the ‘Compensation’ section.**		

	There are 14 allowances you can select and there is full guidance on what you need to enter. If the allowance isn't listed this should be noted within the comments field. 3)Once submitted HR Operations will receive a notification for them to review and approve and then the candidate becomes a 'pending worker'. You will receive a notification once HR Operations have approved or rejected this. The pending worker will become an employee on their start date. 4) An onboarding Journey for the new hire or rehire will be automatically assigned. If the new hire requires a Certificate of Sponsorship (CoS) for a new out of country application, you must **manually assign** the Skilled Worker-Certificate of Sponsorship Journey. For further information and guidance follow the Line Manager or SDA Guide to Journeys.		
Internal Transfer/Additional Post/Internal Secondment	1)Complete the 'Request for Transfer, Additional Post or Internal Secondment' form (available from the HR A-Z forms webpage), noting and completing the form in full and if an internal secondment providing the necessary detail. **Flexible Working** - If you have agreed during the recruitment process to the employee working set days off campus or in exceptional circumstances 100% off campus working under the Flexible Working Policy, the relevant fields must be completed on the form. ****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****.	Review the service request and follow the appropriate internal guidance / People and Money user guide: 'Add Assignment for HR Operations' Generate Contract for Additional Post/Internal Transfer (See Section 11b for further details)	Review the contract, sign and upload a copy. If secondment – review the confirmation letter (no signature required).

	For roles that require a PVG Check, please attach the confirmation email that this has been completed with the SR. The **signed Job Requisition Business Case form** should be attached to provide evidence of budgetary approval. Please ensure you have reviewed the work schedule and provided this within the form and any allowances are listed. The salary costing details must be provided. If costs related 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 liaise with your school research administration team to provide this information if required. For further information on staff costs on projects, please see the Research Finances SharePoint. Research Finance Administrators can find more information and guidance on the User Guides page of the Finance Development Hub. Submit to HR Operations by raising a Service Request, under the category ‘Contract Changes > Transfers/Additional Posts/Secondments’. **Please note** if you submit a request for transfer or additional post/internal secondment to HR Operations via a Service Request the ‘Getting Started in a new role Journey’ will be automatically assigned. HR Operations will delete the ‘request contract task’ as the contract or secondment letter will be generated alongside the service request.		

	For further information and guidance follow the Line Manager or SDA Guide to Journeys. A copy of the Contract / Internal Secondment Letter can be viewed in Document Record once issued by HR Operations.		
Supporting Information **Duplicate Checks** A duplicate check is completed for every hire and is based upon a number of personal identifiers, for example name, date of birth, national insurance number, email address.			

Step 11 – Preboarding including Access to People and Money and Request for Contract

This step describes the preboarding activities line managers/SDAs need to do from the point the successful candidate record is created in People and Money and up until the start date of the post. Along this timeline there are important milestones, they are:

- Assignment of the appropriate Onboarding Journey in People and Money – this happens automatically except for the assignment of the Skilled Worker-Certificate of Sponsorship Journey
- Issue of login details to People and Money in to allow the new hire to view and complete preboarding tasks (see Access to People and Money section below for further details).
- Requesting, generation and acceptance of an employment contract
- First Day Arrangements.

Step 11a - Access to People and Money

1. Once a pending worker record is created, People and Money automatically sends an email to the pending workers personal email address stating that their user account has been created. The email will prompt them to set a memorable password and provides details how to access preboarding (before day 1) tasks within People and Money.

2. To log in to People and Money and view their preboarding (before day 1) tasks the new hire should use their personal email address and password as set up in step 1. Please note that this is a temporary login and is **only accessible until the pending worker reaches their start date** and becomes an employee. From this point, access to People and Money will be via single sign on using their UUN login (see table below). All outstanding preboarding tasks will be carried forward.

3. HR Systems receive a daily report with all newly added pending workers. They use this report to send a "welcome email" advising the new hire of their joining instructions and steps they need to take.

4. **Once a pending worker becomes an employee (on their start date) they will need to access People and Money via single sign on using their UUN. It is the Line Manager/SDA responsibility to provide their new employee's initial password to the new start on day 1 of employment. The initial password for day 1 is provided by ISG or the local computer rep.** The IS Helpline can provide advice on how to obtain a UUN if this is unknown. The Your University Login webpage provides responses to frequently asked questions regarding logins. The People and Money user guide 'How to log in and out of People and Money' provides further details. Any additional access to UoE systems specific to role should be requested by SDA's/Line Managers as per local arrangements ahead of their start date.

5. **Existing employees** (transfers and additional posts) will receive a system notification and email to their UoE email address once the 'Getting Started in a new Role' Journey is assigned.

6. **Students** who have been offered employment with the university (e.g. as a Tutor or Demonstrator) will receive a separate staff login, which can be used for the People and Money system once their position is confirmed. This is issued by their local ISG contact in line with normal University practice and will be confirmed by their line manager or the local SDA. Student Tutors should be reminded to use this login and not their student login, otherwise People and Money single sign-on will not work. This will require them to sign out of their University login if they are logged in with their student credentials. They can continue to use their student login for any other University of Edinburgh resources they need to access.

7. Upon the start date there is an automated process which replaces the individual's personal email with their ed.ac.uk work email.

The table below summarises the log in process.

Category	Before day 1	On start date

New hire (not worked for UoE before)	Use personal email and password	Use staff UUN and password provided by SDA's/Line Managers as per local arrangements
Student	Use personal email and password	Use staff UUN and password provided by SDA's/Line Managers as per local arrangements
Rehire	Use personal email and password	Use staff UUN and password provided by SDA's/Line Managers as per local arrangements
Existing employee	Use current UUN and password	Use current UUN and password

Note - If the employee is required to use People and Money as part of their role, (e.g. School/Department Administrator, Timekeeper or Finance Manager) please request the appropriate access by completing the People and Money Access Form.

Step 11b – Assignment of Journeys and Tasks

A Journey is a collection of tasks that supports the joiner, transfer and leaver processes within the University. Journeys have replaced Onboarding and Leaver Checklists and Tasks (from 24 March 2025). Line Managers can access tasks for their direct reports and SDAs can access tasks for employees within their area of responsibility (AOR).

The table below describes the Journeys for Onboarding available for use in People and Money. Further detailed information is available in the user guides Line Manager or SDA Guide to Journeys. There is also a guide to support new starts titled the Pending Worker/Employee Guide to Journeys.

Journey Name	**Description**
Onboarding Journeys	
Welcome to the University of Edinburgh	For new hires once they become a 'pending worker' in People and Money. The Journey includes preboarding (before day 1) and onboarding tasks (day 1-90).

Rejoining the University of Edinburgh	For anyone re-joining the University, the Journey becomes active once the rehire has taken place. The Journey includes preboarding (before day 1) and onboarding tasks (day 1-90).
Getting Started in a new role	For internal transfers, additional posts and internal secondments moving to a new role.
Skilled Worker Certificate of Sponsorship	A Journey to support the process for applying for a Skilled Worker Visa for new out- of -country skilled workers.
Welcome to Arcadia Nursery	For new hires joining Arcadia Nursery only.
Probation Review Approaching	Journey for new hires and rehires only, will be assigned based on grade and contract type 5 months from start date (for 6-month probation) and 11 months from start date (for 12-month probation).
Offboarding Journeys (for Internal Moves and Leavers)	
Leaving the University of Edinburgh	A Journey to support the process of leaving the University, for employee, line manager and SDAs.
Leaving the University for an involuntary reason	A Journey to support the process of leaving the University, for line manager and SDAs.
End of Assignment but continuing at the University	A Journey to support staff leaving one of their assignments but continuing employment with the University.
Moving Roles – Tasks to complete in your current role	For internal transfers, additional posts and internal secondments and details tasks to complete in their current role.

- All Journeys are assigned automatically with the exception of the Skilled Worker –Certificate of Sponsorship Journey.
- You will be notified of tasks assigned to you by email and via the notification bell, whilst you can take action directly from there it is **preferred** that you review and complete tasks from within the Journeys app.
- If you submit a request for transfer or additional post to HR Operations via a Service Request HR Operations will delete the ‘request contract task’ as the contract or secondment letter will be generated alongside the service request.

- Getting **Started in a new role** journey supports employees, Line Managers and SDAs with staff that are transferring, taking on an additional assignment or moving to an Internal Secondment. The Journey will be automatically assigned, there are **some important process steps to note and follows:**
    - As the new SDA or line manager, you can't see the employee within your Area of Responsibility (AOR)or team structure in People and Money until their start date.
    - **When the Journey is assigned before the start date this will assign tasks to the successful candidate's current primary assignment line manager and representatives (SDAs).** It is therefore important that the employee has discussed their intentions with their manager(s).
    - Before day one the tasks must be reassigned to enable the new line manager / SDA to complete the appropriate onboarding tasks

- **For Sponsored workers the Skilled Worker – Certificate of Sponsorship Journey must be manually assigned (for new out of country applications).**

Housekeeping Legacy Checklists and Tasks

With the move the Journeys (March 2025) we migrated all open and overdue checklists and tasks. It is beneficial to review these old checklists and tasks and close off any that are no longer required. Please follow the steps in the SDA or Line Manager Guide to Housekeeping Legacy Checklists and Tasks to complete this.

Journeys assigned from the 24 March 2025 will be purged and deleted after 15 months from their start date as per the HR Retention Schedule.

Manual Assignment of Tasks

There are currently four available tasks to assign manually for roles that require a **Health Risk Assessment or NHS Honorary Cover.**

The following tasks are to supplement the standard Journeys configured in People and Money and should be manually added as per the table and process below.

Task Name	Category	Description

<table>
<tr>
<td>Complete Key Job Hazards Evaluation</td>
<td>Health and Safety</td>
<td rowspan="2">Line Managers or SDAs should assign these tasks for anyone joining or moving into a role that requires a health risk assessment including, but not limited to:
Animal workers
Laboratory Managers/Technicians/workers,
Night workers, Workshop staff, Principal Investigators/Research Group Leaders
Cleaners
Maintenance staff
Swimming pool maintenance staff.
Further information is available from the Health and Safety webpages.</td>
</tr>
<tr>
<td>Confirm that health and safety measures are in place</td>
<td>Health and Safety</td>
</tr>
<tr>
<td>Upload a copy of your most recent payslip along with a signed and dated CV</td>
<td>NHS</td>
<td>Line Managers or SDAs should assign this task. This is specific to new clinical staff (Doctors or Dentists). HR Operations require a copy of the payslip to match their starting salary and clinical increment date to issue their contract.

Further information is available from the NHS Honorary Cover webpage.</td>
</tr>
<tr>
<td>Upload your confirmation letter of professional indemnity insurance (Doctors/Dentists)</td>
<td>NHS</td>
<td>For information only – these tasks will be assigned by HR Operations as required for roles that require NHS honorary cover.

Further information is available from the NHS Honorary Cover webpage.</td>
</tr>
</table>

Process Steps

	Line Manager	Hiring Manager	School/Department Administrator	HR Operations	HR Systems	Internal Candidate (Transfer, Additional Post or Internal Secondment)	External Candidate (New Hire or Rehire)
Process	1)If required Manually Assign the Skilled Worker-Certificate of Sponsorship Journey and relevant NHS/Health and Safety Tasks. Take steps to reassign tasks for Internal Moves/Transfers to the new SDA/Line Manager. 2) Receive Notifications (and reminders) and Action any tasks as appropriate. 3) Review outstanding tasks allocated to the candidate, for example **it's important to check and remind the candidate to submit their bank details, submit their tax information for HMRC and update all personal details which is essential for Payroll and Pensions.**			Receive Notifications (and reminders) and Action any tasks as appropriate.	Send the welcome email that includes the temporary log in details to **new hires and rehires** to enable access to preboarding tasks.	Receives a notification and email to prompt completion of tasks	Receives a notification and email to prompt completion of tasks) On the start date of the employee an onboarding Day 1-90 tasks will become available

Supporting Information

- Additional New Journeys and tasks can be requested for consideration by raising a Service Request using the category 'Continuous Improvement'.
- Journeys are also assigned when someone moves role or leaves the University

Further detailed information is available in the user guides Line Manager or SDA Guide to Journeys. There is also a guide to support new starts titled the Pending Worker/Employee Guide to Journeys.

Step 11c – Request Contract

The university has a legal obligation to ensure a contract is received by the appointed candidate **by day one of employment**. This is equally applicable to staff employed on a Guaranteed hours contract.

A contract of employment must be issued for **all new hires, rehires, transfers and additional post appointments**. Internal Secondments will receive a letter confirming their secondment arrangements.

For new hire and rehires, contracts will be issued once Right to Work checks have been satisfied and evidence uploaded to document of record. **The SDA/Line Manager must ensure that verified copies of Right to Work documentation is uploaded to Document of Record (DoR) for the worker. Without this the contract cannot be processed.** Please note repeat right to work checks are not required when current employees are transferring or taking additional roles within the University.

For **sponsored workers,** the following must be uploaded:

- PDF resulting from an on-line employer check or copy of visa/vignette in passport
- Evidence that the individual's date of entry to UK was after the start date of the visa (e.g. entry stamp on vignette, boarding card, travel tickets)
- The completed University Right to Work Checklist

If the worker requires to hold a Protection of Vulnerable Groups (PVG) Certificate for their role this must be confirmed **BEFORE** they can start work and the request contract task completed. Once you receive confirmation this is in place **please attach the confirmation email to the comments and attachments section.** HR Operations will not issue the contract until this is received.

Contracts can be generated with subject to clauses where other pre-employment checks have not been fully completed.

The table below outlines when a new contract must be requested.

Hiring Scenario	**Journey**	**When to complete the Request Contract Task**
New Hire	Welcome to the University of Edinburgh	Once the Upload proof of right to work (RTW) task has been completed and if applicable the PVG Check has been confirmed satisfactory.
Rehire	Rejoining the University of Edinburgh	Once the Upload proof of right to work (RTW) task has been completed and if applicable the PVG Check has been confirmed satisfactory.
Additional Assignment	Getting started in a new role	**For advertised posts** Once you have an agreed start date complete the request contract (internal hire) task and if applicable the PVG Check has been confirmed satisfactory. **For non-advertised posts**

		Once you have submitted the Request for Transfer, Additional Post or Internal secondment form HR Operations will action the request contract task with this request. There is no need to complete this task in this scenario, HR Operations will remove this task. (PVG Check Confirmation should be submitted with the Request for Transfer, Additional Post or Internal Secondment Form).

As a guide you should aim to submit the request at the earliest opportunity and no later than 2 weeks before the start date, this will allow time for HR Operations to generate and issue the contract and for the candidate to review. This task is also a prompt for HR Operations to add the work schedule and salary costing information to the record of the new start.

	Line Manager	Hiring Manager	School/Department Administrator	HR Operations	Candidate
Process	**1)Before you start** • Ensure evidence of Right to Work Checks have been uploaded to documents of record and the task marked as complete (not required if internal transfer, additional post or secondment). • For roles requiring PVG check that the PVG Check has been confirmed satisfactory • Agree a start date • Agree the **work schedule** (working pattern) that should be assigned to the employees record. **This is applicable to all types of hire;** every employee must have a work schedule attached to their record and for each assignment they hold with the university. The Guide to Work Schedules provides more information**.** The work schedule calculator can be used to generate a work schedule. This should be used to ensure the schedule is in the correct format for entry into People and Money. **2)Open the request Contract task for the relevant hire**			1)Receive a Notification 'Action Required: Add Work Schedule and Upload contract to Document of Records Allocated for xxx 2)Follow the People and Money User Guide How to generate and amend a contract of employment 3)**Add the Work Schedule** following the People and Money user guide 'How to assign a work schedule to an employee's assignment' If there is not a suitable work schedule available for use this can be requested by raising a service request to HR	Receives an email or if internal a notification from People and Money that the contract is ready to review, this will also be available to them within their allocated preboarding tasks. The candidate should download a copy of the contract to e-sign and accept as per details in the email/ notification.

	Follow the Guide to Journeys for Line Manager or SDA and update all fields, **ensure that you provide** **- Work Schedule** **- Start Date** **- Full details of any Allowances to be included within the contract.** If the approval for the allowance was not included in the original Job Requisition Business Case, please ensure appropriate approval is attached. If the costing codes for this allowance differ from the employee's salary codes, please also specify this. If costs related 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 liaise with your school research administration team to provide this information if required. For further information on staff costs on projects, please see the Research Finances SharePoint. Research Finance Administrators can find more information and guidance on the User Guides page of the Finance Development Hub. If a **Guaranteed Hours Contract**, please ensure the following fields are completed in the request for contract task: • Total number of hours for period • Period hours cover (e.g. per year, over period of FTC) • Annually reviewed (Yes/No) If applicable **attach the confirmation email that PVG is confirmed** The appendix of the user guide Guide to Journeys for Line Manager or SDA details all of the fields within this task and the options available to you.	systems – Forms>Interim Forms>Add a new work schedule 4)Check if any allowances should be included within the contract by reviewing the information in the request. These should also be added to the contract tracker. N.B You can also view any recruitment allowances added at Offer/Add Pending Worker Stage in Element Entries. On a monthly basis, before payroll cut off, add any allowances not captured at Offer or Add Pending worker stage should be added as an element entry in People and Money following the 'Guide to Allowances' People and Money user guide. 5) Add the salary costing details from the JRBC following the 'Guide to Costings per Person' user guide. 6) Check if assignment screens for any details regarding flexible working arrangement to be included in contract 7)Once the contract has been generated, manually add any allowances as per request.	The candidate should also mark this task as complete. If an Internal Secondment they will receive an email from HR Operations with the confirmation letter (no signature required).

	3)Select **Complete** to submit this request to HR Operations. 4) When the contract is issued a system notification will be sent to all members added to the offer team. 5)When the candidate accepts the contract the Hiring Team will be notified - hiring teams should monitor that the contract has been e-signed and uploaded to the onboarding task and that the task is marked as complete. 8)If the contract is not acceptable to the candidate, they should discuss this offline, any changes should be notified via SR to HR Operations who will update People and Money accordingly and regenerate the contract. **Change of Start Date** - see the section below 'Changing Start Dates for Pending Workers'.	Before issue, check the letter against the request. You should upload the contract to the Document Record file and complete this task, this will trigger the task for the candidate to view their contract. 9)Action any changes as a result of renegotiation or change of start date as notified by the Hiring Manager or SDA. This will result in a new contract being issued. For Internal Secondments only generate the letter confirming the secondment details and send to the employee. Upload a copy of the letter to Document Record.	

Supporting Information
Conditions of Service
Contract Types
Right to Work Checks
Hybrid Workplace Policy and Managers Guidance
Flexible Working Policy
Disclosure and PVG Checks

Note - Where an employee is due to be paid in a payroll and no Right to Work (RTW) documentation has been received (not PVG confirmation if applicable) or the information received is incorrect or incomplete the individual's pay will be suspended, and they will not be paid. As soon as this information is received, HR Operations will un-suspend the record and will be picked up by payroll at the next pay run.

Step 12 - Onboarding

Once a new hire's start date is reached their record on People and Money converts from a pending worker to an employee (for new hires and rehires).

The Onboarding period is between day one and day ninety of employment. Tasks within the onboarding Journey on day one of employment will become available for completion. These tasks signpost the new employee to information to support a successful induction. It is also a prompt to the new employee to check their bank details and update personal and emergency contact details. There are also tasks for Line Managers and SDAs to complete.

Line Managers and SDA's - It is important that on day 1 of employment the employee checks their bank details and adds/amend these if missing or incorrect. This also applies to anyone who is a rehire. Guaranteed Hours employees must also check this information on day one to prevent any delays in payments when their hours worked are submitted via the timecard process.

New employees (and rehires) must also upload a copy of their P45 if they have one, if they don't, they must complete the new starter declaration on day one (available in the 'Provide your Tax Information for HMRC' task).

Note – if these tasks do not appear check that the onboarding Journey has been allocated to the new employee. Detailed guidance is available in the Guide to Journeys for Line Manager or SDA and Pending Worker/Employee Guide to Journeys.

The Line Manager will be asked to notify HR if the employee does not start or take up the post (see Step 13 Cancel of Hire).

Any incomplete tasks that were allocated in the preboarding step will carry over and remain incomplete until action is taken.

During the onboarding stage it may be necessary to complete some final document checks where a contract has been issued with a subject to clause (e.g. References).

There are three onboarding tasks in people and money which support the use of the Learning, Skills and Qualifications apps. Managers will be prompted to review and assign learning to a new team member and employees will be prompted to complete suggested learning and review and update their Skills and Qualifications. Further information for employees and Line managers is available in the Learning guidance documents on the People and Money user guide webpage.

Further guidance for managers and employees to support onboarding and induction is available on the Onboarding and Induction webpage.

	Line Manager	Hiring Manager	School/Department Administrator	HR Operations	Employee
Process	1)Receive Notifications (and reminders) and Action any tasks within the Journeys app. 2)Actively review outstanding tasks assigned to the pending worker/employee, you can issue reminders if required. In order for a new employee to be paid they **must complete the following tasks no later than day 1 of employment:** • 'Getting Paid – Enter Bank Details' (Before Day 1 task for new hires only) • 'Check your bank details for your salary correct' (Day 1 task, all new hires and rehires • 'Provide your tax information for HMRC' to upload a copy of the P45 or complete the new starter declaration (Day 1 Task, all new hires and rehires) 3)Ensure that the contract of employment has been requested and that the candidate has uploaded a signed copy and completed the onboarding task. 4)Check and upload any outstanding RTW documents for sponsored workers to Documents of Record. 5)Upload any references obtained to the Employee File SharePoint for the employee			Complete all allocated tasks Support with any ongoing Pre Employment Checks, e.g. RTW.	1)Complete all allocated tasks within Journeys 2)Complete the Induction Survey Task (issued on day 90)
Supporting Information					

Line Manager or SDA Guide to Journeys. Pending Worker/Employee Guide to Journeys. SDA or Line Manager Guide to Housekeeping Legacy Checklists and Tasks

Probation

The **Probation Review Approaching Journey** has been configured based on grades eligible for a probation review and contract type. This will be automatically assigned for new hires and rehires. A notification is sent at the point the task becomes active as per the table below and one reminder is sent after 30 days. Further guidance for managing probation is available on the Staff on Probation webpage and within and within the Interim Guidance for Managing Probation.

Task Name	When will task become available
6-month probation review required	This task will become available 5 months from the employee start date for eligible employees.
12-month probation review required	This task will become available 11 months from the employee start date for eligible employees.

Please Note:

- The Probation Tasks above will only be available for Journeys assigned from 24 March 2025.
- Any inflight employees who were **hired prior to this date** will have the probation task titled 'Probation Review Required' (as per the Onboarding or Rehire checklists). This task will remain with existing timeframes (i.e. the task will be assigned to the line manager 5 months from the start date regardless of grade).
- In certain rehire situations the Probation Journey may not be required (for example when an employee was terminated in error and HR Operations have had to rehire). In this circumstance the Journey can be deleted.

Payment of New Hires

Individuals who begin work at the University after the Payroll has run will not be paid until the following month's pay day. When new employees are added to People and Money, they are classified as Pending Workers until their start date, at which point they will be converted to employees. If a pending worker does not convert to an employee by the time the Payroll is run they will not be paid for that month.

The new employee's record must have all the pay-impacting information in the system by the time the Payroll is run. The payroll is usually run a day or two after the Payroll cut-off date each month.

Changing start dates for Pending Workers

It is important that new starts have the correct start date held in People and Money as this has an impact on pay and pensions. To avoid any impact on the individual, changes in start date must be recorded as soon as possible.

It can often be the case that new starters need to amend their start date, the following details the action to take in the following scenarios:

If the pending worker needs to start <u>at a later date</u>

Line Managers and School/Department Administrators can amend this directly in the system without raising a Service Request.

1. Go to My Client Groups

2. Pending Worker

3. Edit Pending Worker

4. Update the date and any other information that may have changed

5. Add a comment in the comments and attachments section so that HR know this is a start date change. There is no need to add a Job Requisition Business Case (JRBC).

6. Submit.

HR Operations will then receive a notification to approve this. Once approved the change will be visible.

If the pending worker <u>needs an earlier start</u> date OR the <u>pending worker record has already converted to an employee</u> by the time you are notified

These kinds of changes will require more complex changes to the individual's record and will need impact assessed from a payroll perspective. In these instances, raise a Service Request using the category Enquiry >Contract Changes

Step 13 – Cancel of Hire

There are certain scenarios when the process for cancel the hire should be followed, namely:

- Employee is a no show or has advised the university they do not wish to start
- The decision is taken to withdraw the offer of employment due to pre employment check failure or failure of Right to Work checks

Line Managers / SDA's **should not process the cancellation of hire** in people and money, instead they should follow the steps below.

	Line Manager	**Hiring Manager**	**School/Department Administrator**	**HR Systems**	**HR Operations**
Process	1)On the employee's first day Line Managers have a responsibility to confirm if the employee **does not start**. The Onboarding task 'Did your new hire turn up?' will prompt Line Managers to complete this task in People and Money. 2) If your new hire did not turn up or is no loner joining follow the steps in the onboarding task to raise an SR, alternatively raise a service request under the category of **Enquiry>Resourcing>Cancel Hire** providing the details of the person that is no longer joining. **Line Managers or SDAs should not process the cancellation of hire themselves.** 3)Consider if recruitment needs to be reopened. Contact HR Operations by raising a Service request, using the category Advertising if you need to reopen the requisition.			Upon receipt of SR: 1) Review the employee record, where possible follow steps to purge the record 2)Remove all non- mandatory personal data 3)Reassign the SR to HR Operations if **unable** to purge the record, e.g. if rehire.	Upon Receipt of SR follow the Termination Process using the <u>People and Money user guide ' Terminations Checklist'</u> 1)Check if employee has any direct reports and reassign 2Update Hours to zero to ensure no payment is made and Terminate Record same date as hire date 3) If the employee is a sponsored worker, follow the above checklist and notify the

	4)Make arrangements for the collection of any equipment or access cards issued ahead of the start date.		home office that the new hire will not be starting employment.

Supporting Information Payroll are notified via a report once People and Money is updated, and the hire is cancelled.

Appendices

Appendix 1 - Subsidiaries

There are three subsidiary companies, Edinburgh University Press, Edinburgh Innovations and UoE Accommodation Ltd. Below outlines the scope processes available for recruitment and onboarding and a breakdown of current levels of adoption of the system across the 3 areas.

	In Scope Activities	**Out of Scope**
Recruitment	Can use Oracle Recruitment Cloud (ORC) to advertise, select and hire staff. All vacancies will appear on the UoE careers site Positions to Recruit Against. Own Job Requisition Approval Routing (pending defect resolution.	Own branded careers site for each subsidiary. Subsidiary specific application flows. Offer Letters– the templates are UoE in the template library and therefore need to be produced offline.
Onboarding	Existing Tasks within the library can be issued (e.g. provide bank details). Arcadia - UoE Accommodation Ltd – Onboarding Journey	Contracts – the templates are only UoE in the content library and therefore need to be produced offline. Onboarding Journeys – only configured for UoE, Edinburgh University Press and Edinburgh Innovations can allocate existing tasks within the library.

Appendix 2 – HR Phase and State

When a candidate has been moved to HR (after offer accepted), they sit in the ‘HR Phase’ of the process. There are a number of states as described below:

State	Description
Pending Manual Processing	Job offers in this state awaiting HR Operations to process them. This usually includes internal candidates who have been moved to the HR phase, and possibly any external candidates who need manual reprocessing. Any error messages displayed should be resolved by HR Operations
Pending Automated Processing	A temporary state that candidates do not typically stay in for long as they move automatically to either Pending Manual Processing (internal candidate) or Processing in Progress (external candidate). If any errors are identified at this state, they are moved to the Error during processing instead. If HR Operations needs to move a given candidate out of the state Pending Automated Processing more quickly than the configured frequency, they can use the Process Now action.
Error During Processing	When a job offer encounters a mismatch or problem in its automated processing, the offer goes into this state (as outlined above). HR Operations will review and may require to work with the school or department to resolve this.
Processing in Progress	This is the state where all candidates go as they move successfully forward through the hire process. • For an external candidate, it means that a pending worker has been created based on that offer. • For an internal candidate, it means that HR Operations carried out the appropriate action which will create the new assignment
Processed	This is the final state where all successful candidates end up after the pending worker record has been converted to an employee with an assignment, or when the internal candidate's assignment has been created.