Creating a New Starter - Contracted

Purpose:

This guide will show you how to **Create a New Starter – Contracted (to set up a contracted employee)** in Your HR. Use this process chain to set up a new employee who is contracted i.e. not casual/supply.

Important Notes Before You Begin:

- You are advised NOT to enter new starters whilst contracts are locked, however, if you enter a new starter with a start date of the current month whilst contracts are locked (i.e. after your input deadline has passed), the employee will NOT be paid if the payroll has already been run! They will be paid in the following month.
- If you abandon a process chain for any reason, you must log out of the system and back in again. A task will appear in you 'To do list' and you can pick up and finish the chain by clicking on this.
- If you abandon the process chain before you attach the employee to structure, you must raise a Task and ask WES HR to attach the employee to the relevant position. Once this has been actioned, you can pick up the chain from your 'to do' list.
- If you abandon a process chain and cannot get back to it from your 'to do' list to complete the input, you can use the Person Details Administration screen. If you attached the employee to a position, then you must Not attach them to structure again!

Before you start, check that you have a vacant position for the new starter and if necessary, submit a task for WES HR to create one for you. You can use the 'Your Positions' to view your positions or the report called Vacancy Details.

Note: Make a note of the Position Ref. No for the vacant position before you start the chain as you will need this to finish your input.

To access the new starter process chain, **you need to first search for an existing employee to check that the new employee does not already exist.** This is to prevent duplicate employee records from being created for the same.

- To do this, search for any employee within your school. Click 'Your People' and click search. Select a record in the list.

- From the links section click/tap 'New Starters' then 'STEP 1 – Existing Employee Check'

> Personal Information   > Employment Details   ∨ New Starters   > Movers & Changes

> Make Your Employee a Leaver   > New Starter Declaration / Reference Consent

> Leave & Absence   > Temporary Payments & Expenses   > Submit Provisional Claims

> Contracts & Letters   > Useful Links

STEP 1 - Existing Employee Check   New Starter - Contracted Employee   New Starter - Casual/Supply Worker

New Starter - Non Payroll   New Starter - Transferred from Another School

- The Person match screen will be displayed:

Person match	∨ MENU C 🖨
Employee search	
Social security no.	
Date of birth	
Surname	
Forename	
	Search

- It is advised you undertake the search using the NI number (Social security no.) as this is unique to every employee. You can, however, undertake a search on a combination of the other fields. Click on the **Search** button. One of 2 things will happen:

1) If a person match is found with an existing employee, then the employee's personal information will be displayed.

Select employee

Surname	Forename	Job title	Reporting unit	Leaver	Leaving date	Previous surname
Test	Albert	Teacher Main Scale	Teaching - Test C of E Infant School	No		
Test	Andrew			No		
Test	Avril	Deputy Headteacher DH03	Teaching - Test C of E Infant School	No		
Test	Claire			No		
Test	Francis	Teacher Main Scale	Teaching - Test C of E Infant School	No		

Notes:

- The search will be restricted to your access so if you work for an academy trust and your access is restricted to a specific school within this (i.e. you do not have access to all the employees in the whole trust), the search will not return any matches if the employee already works at one of the other schools. You should, however, be able to establish if they already work within your trust from the application form. If they already exist, then one of your users within the trust should have access to the entire trust and they can add an additional position on your behalf which you will then be able to access.

- If the employee works for another Academy, a maintained or foundation/VA school, then you are required to set them up with a new employee record as the employer is different.

- If you are a maintained school and the employee also works for Warwickshire County Council, the employee must not be set up with a new employee record because the employer is the same. You must raise a Task and ask WES HR to add an additional position for your school.

- If you are a foundation/VA school and the employee also works for a maintained school, another foundation/VA school or an academy then you must set up the employee with a new employee record as the employer is different.

If one of these is your new starter, you must undertake the following:

- If the employee works for another school /organisation and is leaving that school to transfer to your school, refer to the guidance under 'Transfer Employee to Another School'.
- If they are retaining their existing position(s) at the other school/organisation then you much submit a Task and ask WES HR to create an additional position for your school. You must provide the employee's name, personal reference number, start date in your school and the Position Ref. No.

2. If no person match is found, the following message is displayed:

No people meet the search criteria entered.

- In this scenario, you need to navigate back to the summary screen by clicking on an employee name from the left-hand navigation. You will then begin the process.
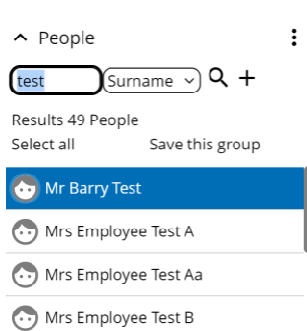
Creating a new starter - Contracted

- From Links, click on **New Starters** and click on the **New Starter – Contracted Employee** process chain.

Please enter the date you wish to view or edit this information from.

03/04/2023

OK   CANCEL

- Set your **Effective date** to the start date; either enter or select the date from the calendar then click on **OK.** The date in the top left-hand corner of the screen will change
- The first step of the process chain is displayed:

- Fields with a red asterix (*) next to them indicate these are mandatory fields and must be completed. You are required to enter the personal information in the fields in the Personal Information section below, other fields are optional:
- Surname
- Forename
- Title
- Start Date
- Workflow group – leave this as 'DEFAULT'
- Data Retention Policy – leave the default of 'Organisation Leavers – Payroll'

- **Attach person to structure:**
- Click on the **magnifying glass** and undertake a search for the relevant vacant position. You must search using the **Position ref. no** you noted before starting the chain. Change 'Job title' to '**Position ref. no'**. For example:

- Click on the **magnifying glass** to undertake the search and a list of matching positions that are vacant at the effective date will be displayed
- If you select a position that is occupied in the future, the system will give you a message telling you the date from which it is occupied:

⚠ This person can only be attached until 19/01/2023 because the position will be occupied by another person at that date. If you continue the person will occupy a temporary position within the organisation from 20/01/2023.

- You must NOT ignore this message. If the employee is only occupying the position you have selected for a temporary period until the other employee occupies it from the future date then you can select it. If, however, this is not the case then you must search for another vacant position. Click on the relevant position to select it:

- **Select a Contract:**
- Delete the words **<Enter contract name:>** and type **Contract**. You must NOT call contracts the name of the position because the contract is used to group all positions occupied by the employee. Therefore, if they take on an additional role or transfer to a different position in future, the contract name will no longer be meaningful.
- Once you have entered this, click on the **SAVE** button. The message will be displayed:

The screen will go blank and appear as follows:

- Click on the right arrow to move to the next step in the process chain
- The completed Personal details screen is now displayed and the system will have automatically generated the Personal ref no as shown in the example below:

- Click on the right arrow to move to the next step in the process chain

- The Effective date box appears. Ensure this is still set to the start date of the employee
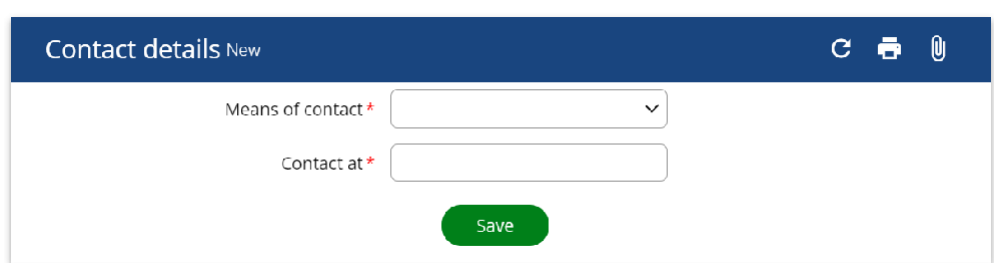
The Address details screen is displayed:

Enter:
- **Address type:** leave the default of 'Home'
- **Mailing address:** if the employee only has one address then this can be left blank. If, however, you need to enter 2 different addresses (i.e. one permanent and another which is used during the week) then tick the one which is to be used as the main address
- **Address line 1:** enter the first line of the address

- **Address lines 2-3:** enter if required
- **Address line 4:** enter the town
- **Address Line 5:** enter the County
- **Postcode:** enter the postcode
- **Start date:** this should default to the employee's start date.

- Click on the SAVE button. The message 'Changes have been saved' will appear at the top of the screen.
- Click on the right arrow to move to the next step in the process chain
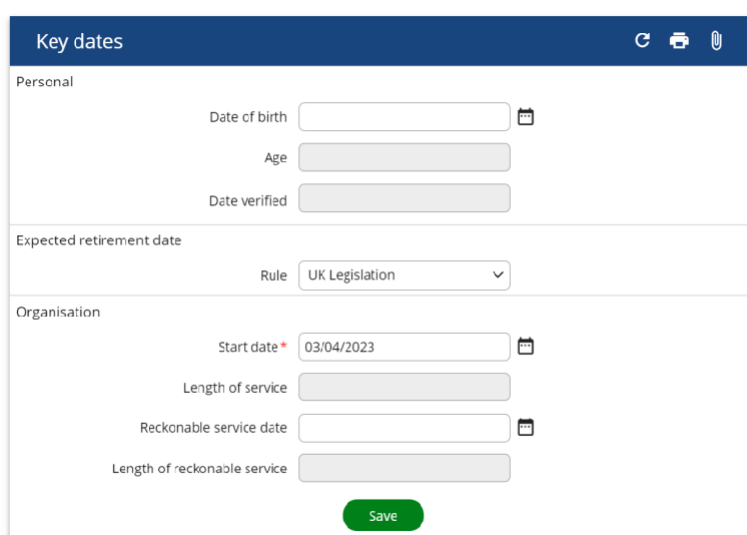
The Contact details screen is displayed:

Use this screen to enter a contact details.

For schools using Employee Self-Service (ESS), an email address must be entered as a means of contact of 'Work email address'. This can, however, be either a work or personal email. If one is not entered, the employee will not be able to register for Schools IdP which they must do before they can access ESS.

Enter:
- **Means of contact:** select the option from the drop down list
- **Contact at:** enter the email address or phone number depending on the means of contact selected

- Click on the **SAVE** button
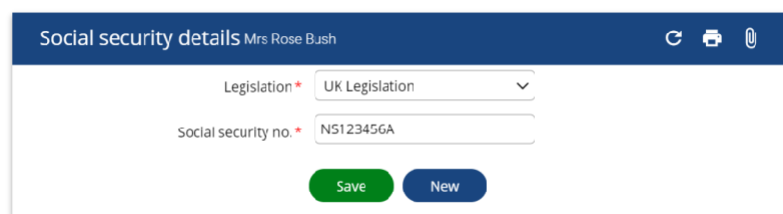- Click the arrow to go to the next stage of the process chain

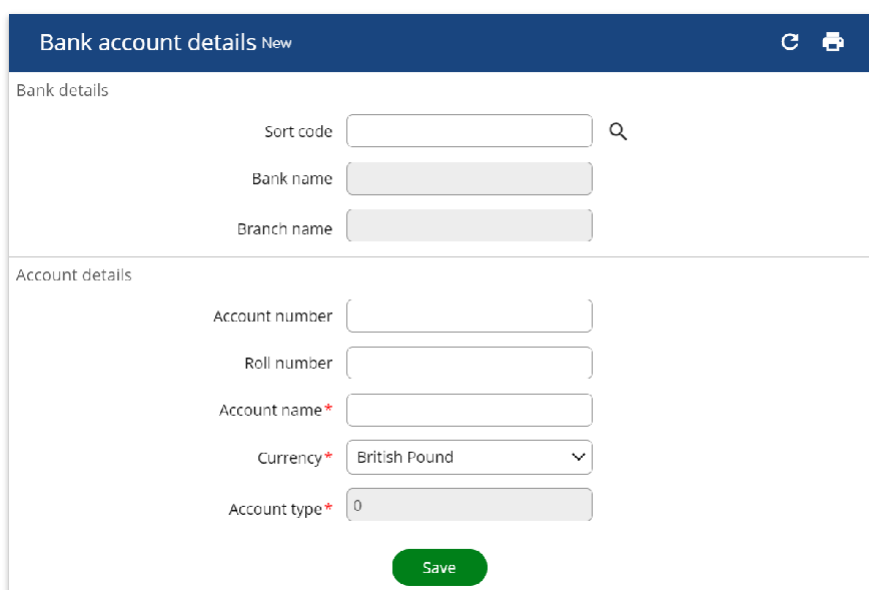**The Key dates screen is displayed:**

Enter:

- **Date of birth:** enter or select this from the calendar
- **Start date:** ensure this is set to the employee's start date
- **Reckonable service date:** this is the **Local Government Continuous Service Date** i.e. for non teaching. **Note:** the Teachers continuous service date will be entered in the Reckonable Service Screen by WES HR for all customers with the exception of Wokingham Borough Council where the inputters are required to enter Teachers continuous service dates.

- The Expected retirement age and date, Length of service and Length of reckonable service dates will automatically populate as shown in the example below:
- Next, enter the date the **Date of birth was verified**. Enter today's date if you do not know the date the evidence was checked.
- Click **SAVE**
- Click on the right arrow to move to the next step in the process chain

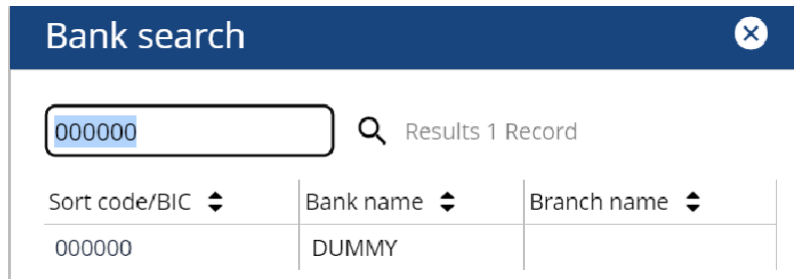## The Social security number screen is displayed:

- Enter the NI number

- Click on the **SAVE** button

- Click on the right arrow to move to the next step in the process chain

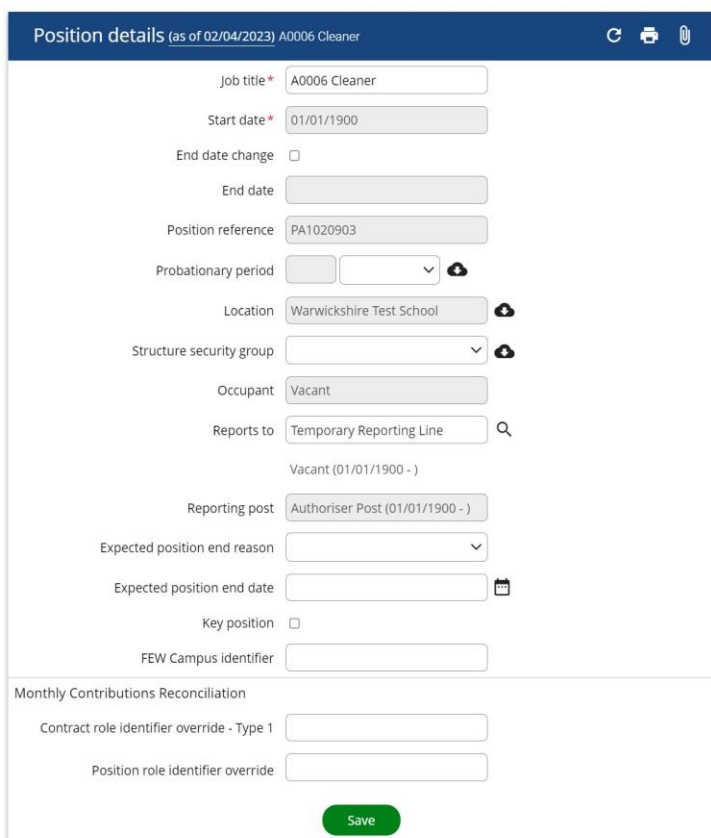## The Bank account details screen is displayed:

- **Sort code: do not manually enter this,** click on the magnifying glass and enter the sort code in the 'Bank search' dialog box and click the magnifying glass to search as shown below:

- To select the code, click on it. This will populate the **Bank name**

- **Account number:** enter the 8 digit account number. _Note: Your HR will allow accept an 8 digit account number but some building society numbers may be 9 digits long. In this instance, the employee must contact their building society and ask them to confirm which digit can be removed; this will usually be the first or the last one_

- **Account name:** enter the name of the account holder

- Click on the **SAVE** button

- Click on the right arrow to move to the next step in the process chain
- The Effective date box appears. Ensure this is still set to the effective date of the new position

- Click on **OK**

- **The Position details screen appears as shown below**. You should not need to enter anything in the step, just check the details are correct:

- Click on the **SAVE** button

- Click on the right arrow to move to the next step in the process chain

The Probationary periods screen is displayed:

Enter:
- **Reason:** select 'New appointment'
- **Start date:** enter the employee's start date
- **End date:** this is the end date of the probationary period

IMPORTANT NOTE: Do NOT tick the 'Complete' box!

- Click on the **SAVE** button

- Click on the right arrow to move to the next step in the process chain

- The Effective date box appears. Ensure this is still set to the effective date of the new position

The Hours and Basis screen is displayed:

Inherited data items from the structure are denoted by the . You can break the inheritance as required.

Enter:

- **Contractual hours:**
  - If the employee is part time, enter the contracted hours.
  - When setting up a Clerk to Governor, the Contractual hours' will inherit to '1,929.29' hours which are the full time annual hours. If the employee is working part time, this must be amended to reflect their '**annual**' and not weekly contracted hours
- **Annual weeks worked:**
  - enter the annual term time only weeks if the employee works term time only
  - Apprentices will inherit 52.179 and not '52.14'. Do NOT change this as this is used to ensure the hourly rate for Apprentices is correctly calculated
- **Employment is term-time only (TTO):** only tick this box if the employee works term time only
- **Category:** leave the default of 'Employee'
- **Basis:** For term time only employees, select 'TTO Non-Elected' so the position is correctly reported for Pension pensions; this is because most schools based employees do not have the option of working 52 weeks. However, if they do, you must select 'TTO Elected'
- **Type:** amend this if required by selecting an option from the drop down list
- **Change reason**: leave blank as not required for a new starter

- Click on the **SAVE** button

- Click on the right arrow to move to the next step in the process chain

Working Patterns

- The Patterns will appear in the object pane in the left hand navigation as shown below:
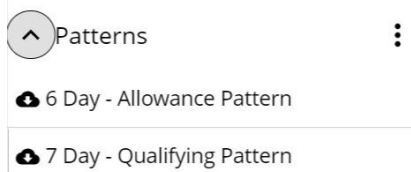
- Click on either one of these existing patterns and the details will be displayed.

- Click on the **NEW** button to open a blank pattern details screen. Do NOT override an existing Allowance or Qualifying pattern details as this will affect the absence entitlements for the employee!

- The Pattern details screen is displayed:

- Refer to Appendix B of the [School Administrator User Guide](#) for further details.

- If the employee has directed time and this additional time is used in the calculation of overtime rates and unpaid leave deductions then ensure the working pattern accounts for this.

- The pattern is inherited from the structure.

Enter:

- **Type:** select Working Pattern
- **Pattern:** you must select the correct Pattern by clicking on the magnifying glass and searching for a pattern with the number of weekly contracted hours in the name. For example, if the employee works 25 hours:

- You must select the correct pattern based on the number of hours the employee is contracted to work each day. If you cannot find the pattern you need then please submit the **New Working Pattern Request Form** and ask for a new working pattern to be created
- **Start day:** refer to the day on which the employee's start date falls e.g. 2 July 2018 is a Monday so the start day will be Week 1 / Day 1. If it was a Friday then you would select Week 1 / Day 5

- **Start date:** enter the employee's start date
- **In the Pattern days section:** ensure this starts on a Monday.

An example of a completed screen will look like this:

- Click on the **SAVE** button

- Click on the right arrow to move to the next step in the process chain

- The Effective date box appears. Ensure this is still set to the effective date of the new position

The Payscale values screen is displayed:

The Grade is defaulted from the Post the position is attached to and cannot be changed.

Enter:

- **FT Salary**: select the scale point which must be in the Grade minimum and maximum as shown e.g. in the example above, you can only select 06. If you select a scp outside of the range, the following message will appear 'Rate of pay falls outside allowed range'.
- **Override bar point:** leave this blank unless the employee requires a ceiling/bar e.g. salary progression is dependant upon successful attainment of a qualification
- **Next increment date:** leave this blank unless the employee is due their increment in 6 months' time instead of 1 April
- **Protected rate of pay:** leave this blank unless the employee is on protected pay. For further details please refer to the section on Protected Pay.

- Click on the **SAVE** button

- Click on the right arrow to move to the next step in the process chain
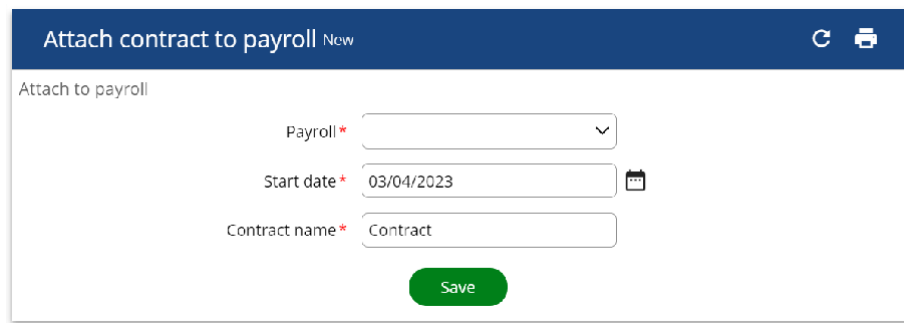
<u>The Occupancy details screen is displayed:</u>

- If the new position is for a fixed term basis, enter the end date and reason in the **Expected occupancy end date** otherwise leave this blank.

- Click on the **SAVE** button

- Click on the right arrow to move to the next step in the process chain

The Attach contract to payroll screen is displayed:

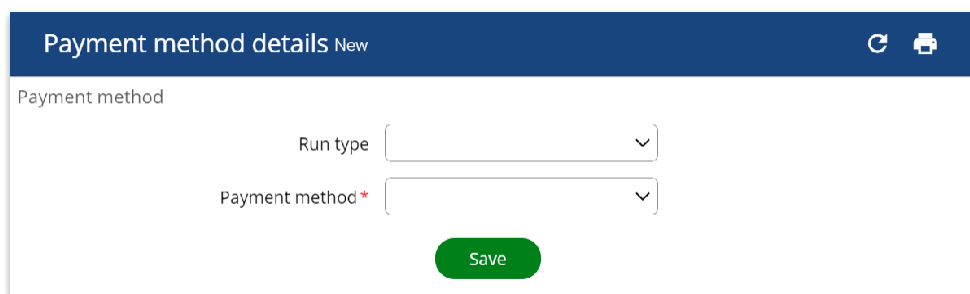**Enter:**
- **Payroll:** select this from the drop down list (when you select this, additional fields may become visible on the screen)
- **Start date:** this should default to the employee's start date – do not change this
- **Contract name:** this should default from the Attach to structure screen and should be called Contract – do not change this

- Do not enter any further information on this screen

- Click on the **SAVE** button

- Click on the right arrow to move to the next step in the process chain

The Payment method details screen is displayed:

- This screen shows the payment method and bank account details for the employee.

Enter:
- **Payment method:** select this from the drop down list for your school/academy. Most schools and academies will use BACS. When you select this, the Bank account details section of the screen will become enabled:

Enter:
Bank account: select this from the drop down list. This will populate the rest of the screen

- Click on the **SAVE** button

- Click on the right arrow to move to the next step in the process chain

The National Insurance details screen is displayed

Enter:
- **Level:** this will default to the '**Contract**' – you must NOT change this!
- **NI category:** select this from the drop down list:

NI Code	When to use this
A	All employees apart from those in groups B C, J, H, M and Z This is the most commonly used code
C	Employees over the State Pension age
H	Apprentices under 25. Apprentices must be set up on category H and not M. Unless the apprentice turns over the age of 25 no action will be required to amend their tax code
M	Employees under 21. If someone is on the under 21 rate for NI, Your HR will automatically move them to NI category A in the month they reach their 21st birthday

- The code must be entered as part of the new starter process and is always attached against the 'Contract' and **NOT** 'position'.

An example of a completed screen looks like this:

- Click on the **SAVE** button

- Click on the right arrow to move to the next step in the process chain

The Tax code details screen is displayed:

Enter:
- **Tax code source:** select either **'New employee'** or **'None'** from the drop down list

- Further fields will appear depending on which Tax code you select i.e. details of a Student loan, Postgraduate loan and whether the Employee has provided a P45:

- **Student loan plan type:**
- If the employee has ticked that they are in receipt of a student loan but have not made full repayment, you must submit a Query informing WES HR so they can deduct the student loan. State the Plan type based on the course start date and where the employee lived at the time. Please note if a new employee starts on 1 September, their student loan deduction will now commence at the start of the new financial year i.e. the following 1 April:

Student Loan Plans:
Plan 1   Before September 2012 or living in Scotland or Northern Ireland
Plan 2   On or after 1 September 2012 and living in England and Wales
Plan 4   Came into effect from 6 April 2021

- Leave this blank if you do not know if the employee is in receipt of a student loan.

- **Postgraduate loan:** select either Yes or No

- **Employee has provided P45:** select the appropriate choice and ensure you complete all mandatory fields that are enabled following your selection. If a new starter does not provide a P45, you need to work out which tax code and starter declaration to enter in Your HR when you set up a new starter.
- You will usually get most of this information from the employee's P45, but they will have to state which one of the following statement applies to them if they don't have a recent P45. This will need to be entered in the Tax code details screen in the **New Starter Questions** field:

	Statement
A	This is my first job since last 6 April and I have not been receiving taxable Jobseeker's Allowance, Employment and Support Allowance, taxable Incapacity Benefit, State or Occupational Pension
B	This is now my only job but since last 6 April I have had another job, or received taxable Jobseeker's Allowance, Employment and Support Allowance or taxable Incapacity Benefit. I do not receive a State or Occupational Pension
C	As well as my new job, I have another job or receive a State or Occupational Pension.

- If the new starter does provide you with a P45, you will be prompted to enter one of the following options in the **P45 year** field:

- If the correct option is not selected, the employee will receive either a tax bill or tax refund they are not entitled to. It is possible that HMRC will say it is an employer responsibility to pay this but in most instances, it is the employee who will have to pay it. As a result, please take care to make the correct selection:
- **P45 is for current tax year:** P45 is dated after 6 April of the current year
- **P45 is for previous tax year:** select if P45 is dated prior to 6 April of the current year
- Else, select **P45 is older than the previous tax year**.

- Click on the **SAVE** button
- **Note:** if you realise that any of the details you entered were incorrect, you cannot amend them and save again and will have to delete the Tax code details, re-enter and save them. It is, however, advised that you do this upon completion of the process chain

- Click on the right arrow to move to the next step in the process chain

The E-form preferences screen is displayed:

Note: *Work and shared personal emails are not advised due to possible GDPR/data protection breaches.*

This screen is not needed and can be skipped.

There is a separate screen where e-form preferences can be added. Inputters can add the details after adding the new starter, or the new starter can go into ESS and input the details themselves

- Click on the **SAVE** button

- Click on the right arrow to move to the next step in the process chain

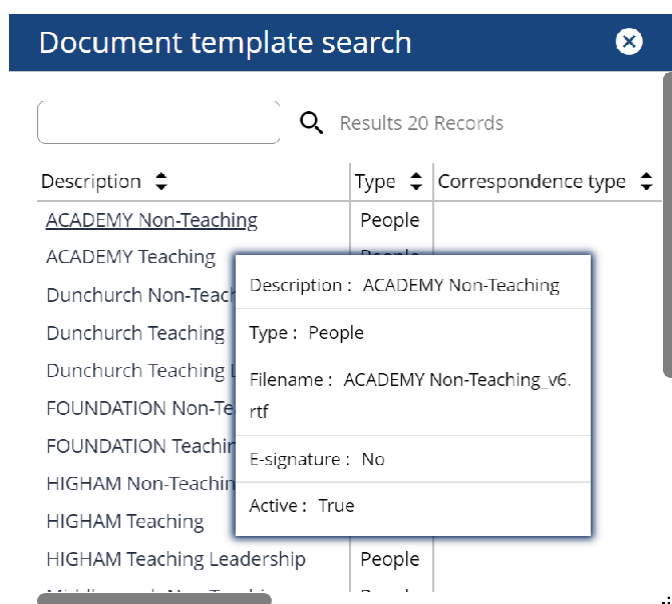- The Effective date box will appear. Ensure this is still set to the start date

The Run document merge screen is displayed:

Important: Note the Position reference number for the new position as you will need this when making the new starter declaration.

- If the new position is casual, you are not required to generate a contract. Click on the right arrow to move to the next step in the process chain.

- If the employee is a Teacher, the contract must not be run until WES HR have run a TR2 and entered the teaching continuous service; your authoriser will receive an email notifying them when this has been done. The exception is Wokingham Borough Council who must enter teaching continuous service dates.

- If the position is contracted, click on the magnifying glass and the document template search window will appear. Click on the magnifying glass again to list the templates. The following message will appear:

Are you sure you want to search for everything?

| OK | Cancel |
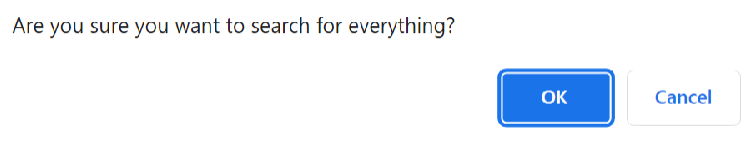
- Click on **OK.**

- Use the scroll bar to find and select the contract template that is relevant for the position:

Document template search

Results 20 Records

Description ⇕	Type ⇕	Correspondence type ⇕
ACADEMY Non-Teaching	People	
ACADEMY Teaching	People	
Dunchurch Non-Teach		
Dunchurch Teaching		
Dunchurch Teaching		
FOUNDATION Non-Te		
FOUNDATION Teachin		
HIGHAM Non-Teachin		
HIGHAM Teaching		
HIGHAM Teaching Leadership	People	

Description : ACADEMY Non-Teaching

Type : People

Filename : ACADEMY Non-Teaching_v6. rtf

E-signature : No

Active : True

- If you hover over an entry, further details will be displayed: Click on the correct template to select it
- Click on the **RUN** button. The following message is displayed:

- ⓘThe request has been queued. You will be notified when the process has completed.

- Continue with the process chain and download the contract once the input has been completed by following the guidance under 'Contract of Employment'.

- Click on the right arrow icon to move to the next step in the process chain:

ce0242de.webitrent.com says

The chain process has finished. Do you want to start a new one?
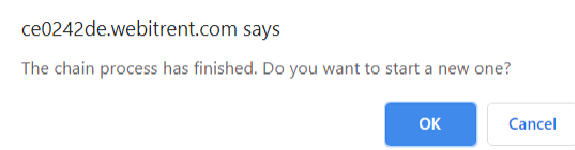
OK   Cancel

- **Click on Cancel if you do not have another contracted new starter to set up**

- Click on the employee's name to return to their summary screen

Document History

Version	Date	Author	Document History
1.0	2017	Lewis Ashwood	Document Creation
1.1	9 May 2019	Ami Atwal	Updates for ESS Schools
1.2	24 May 2021	Ami Atwal	Revised to reflect changes to process chain
1.3	January 2023	Neil Gartland	Updated for version 10.46
1.4	September 2024	Joe Booth	