

People and Money HR processes, March 2021



*For Directors of Professional Services, Implementation Groups,
School/Department Administrators and Local Guides*

Purpose of document

To provide updates and pointers on:

- Recruitment
 - Changes to SDA access to recruitment information in People and Money – late applications
 - Offer process
 - Assigning checklists – manual assignment of pre-boarding checklists
 - Issue with 'Move to hire'
 - Immigration
 - New references report
 - Tips and reminders
- Annual leave including new leave report coming soon
- User guides and HR guidance
- HR Helpline service requests
- Phase 1 wrap-up
- Phase 2 walkthroughs and user acceptance testing (UAT)

Recruitment

We can see that most people are moving successfully through the recruitment process. A small number of defects have also been identified, which have been or are in the process of being fixed.

Changes to SDA access to recruitment info in People and Money – late applications

On 17 March a change was made to the access for school/department administrators (SDAs) which means the SDA role only has visibility of job requisitions they are directly supporting.

This means administrative staff will only see job requisitions (which are requests for permission to recruit), candidate information and application status for those they set up themselves or are assigned to as a recruiter, hiring manager or collaborator. SDAs will have no access to the database of candidate information and applications.

In exceptional cases, where the online application process can't be followed, SDAs will no longer be able to add a candidate to a job requisition and will need to raise a service request in order to ask HR to do this. 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, eg: 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.

Offer process

We've had feedback that the offer process hasn't been working in a consistent way, resulting in some offer letters being issued using the default system template. We've investigated this issue and have identified an interim solution while we continue to work with Oracle to resolve the underlying issue. The link [here](#) provides hiring managers/SDAs with the steps they need to take.

The main difference is that instead of downloading the offer letter template held within the system, hiring managers/SDAs need to select the offer template from a suite of standard templates, held on the [Getting ready for changes SharePoint](#). The completed letter then needs to be uploaded to the attachments section of the offer process in People and Money. The rest of the process remains unchanged and candidates will continue to be able to view and accept their offer electronically.

For in-flight offers at the 'Pending approval' stage, HR Operations will reject these to allow the interim process to be followed. For offers in the 'Draft' stage, hiring managers/SDAs should make changes to the draft and then resubmit the offer using the new process. This will ensure the correct offer is extended and stored on the successful candidate's record.

We expect this to be an interim solution. Oracle have confirmed this issue will be addressed in the next quarterly update, in May 2021. We'll test this any updates before releasing them.

Assigning checklists – manual assignment of preboarding checklists

In the last update, we noted that the generic preboarding checklist is only automatically assigned to incoming employees (pending workers) that have not worked for the University before.

For internal transfers, additional post, internal secondments (internal candidates) or rehire (external candidate) the relevant checklist will need to be manually assigned. For internal transfers, additional posts and internal secondments (internal candidates) the candidate will move to HR automatically upon acceptance of the job offer.

The hiring manager or SDA should allocate the appropriate preboarding checklist following the user guide [How to allocate checklists and tasks](#). Please note there isn't a specific checklist for internal secondments, at present.

Please see below for what checklists to add:

- For transfers and additional posts please select 'Internal moves/additional posts - manual'
- For rehires please select 'Enterprise onboarding checklist - automatic'

The trigger for this would be when the job offer team receive the notification 'Assignment is complete for [candidate name] for job offer [job title].

Failure to manually allocate a preboarding checklist will result in no contract request being completed and no contract created or updated to Oracle. This could lead to payment issues for staff.

SDAs can now allocate checklists to employees who are transferring from another school/department.

Issue with 'Move to hire'

Oracle is currently reviewing an issue with the 'Move to hire' action. When a candidate has accepted the job offer, a 'JBO' error happens for some candidates when the 'Move to hire' action is completed. Please note that although we are talking to Oracle about getting this error message removed, it doesn't affect the process and the applicant continues moving through the hiring stages as planned.

Immigration – Right to Work documents

We'd like to remind colleagues that 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. The penalty for this is £20,000 per illegal worker.

To ensure we hold the necessary RTW documentation before an individual starts work, under usual circumstances this is taken at interview. During Covid, the check is 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, eg: undertaking a UKVI employer check or resolving issues with the documentation, is carried out prior to the person starting work.

Please submit RTW documentation as a People and Money task using the category 'Right to work'. This enables upload as a Document of Record.

To request a UKVI Employer Checking Service (ECS) check, please submit a service request under the category 'Right to work'.

To help prioritise the tasks coming into the HR Operations team, it would be helpful to include the following information in the title of the task:

Type of task	Title of task/service request	How to submit
New employee	RTW doc: employment start date Eg: RTW doc: start date 01/05/2021	Task
Repeat Right to Work check due to visa expiry	RTW doc: Expiring Visa End date Eg: RTW doc: visa expiry 01/05/2021	Task
Request for an ECS check for a Positive Verification Notice (PVN)	ECS Check: visa expiry date, Eg: ECS Check: visa expiry 01/05/2021	Service Request

Please ensure the task is submitted sufficiently in advance to allow the Right to Work document to be reviewed and the contract generated. HR Operations will generate contracts within five days of the request.

Further details regarding Right to Work checks can be found on HR's [Immigration pages](#).

New references report

We're pleased to confirm that a new report is now available 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. The first reports will be retrospective, covering candidates moved to interview or offer in the three-week period prior to 17 March. Referee details will remain on the list for two weeks before they drop off the report.

Please note that People and Money, and hence the report, supports up to two references.

Please let us know of any feedback, particularly regarding the report frequency. Longer term, we plan to generate reference letters automatically for recruiters to send on by email, saving time.

Tips and reminders

We've recently seen an increase in HR Helpline queries around pending workers being unable to add their bank details when completing onboarding tasks. In all these cases, the underlying cause has been linked to a missing payroll relationship in People and Money, specifically the fact that **UoE Group has not been added under 'Payroll'** when the pending worker was set up.

This information is critical.

To prevent this from happening, along with the potential impact on payroll, please could all users adding pending workers ensure they 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'.
- Then, click the 'Add' button against 'Payroll Frequency' and select 'UoE Group' under 'Payroll'.

We've also received feedback that some internal and external candidates haven't been able to see the job description when clicking on the link as they 'do not have access to the job library'. The root cause of this issue is the wrong SharePoint link being used by staff when adding the hyperlink to the posting description.

- Please be sure to use the link sent in the auto-generated email from SharePoint when the job description is added.
- Anyone advertising a vacancy should not use the 'Copy link' functionality in SharePoint as this will take people to the library (which requires access) rather than the document itself.

Our Inoapps support team has confirmed that the reason the 'Change salary' details are showing as zero is because SDAs/line managers are forgetting to select 'Annual salary' in the 'Salary basis' field when completing the 'Add pending worker' process.

Annual leave - including new leave report coming soon

Oracle is reviewing the issue where on the 'Team schedule, w/c 27 December 2021 only shows the leave for the top person on the schedule. Oracle will fix this in an update in autumn this year.

In the meantime, please note this doesn't impact employees' annual leave balances. Leave booked, approved or pending can be seen line managers and employees by going to 'Time and absences' > 'Existing Absences' > 'Future'. In the bottom right, you can load more items to see the full list of future leave requests.

We're developing a report which gives a departmental view of leave types. This will allow SDAs, who can't currently view teams' work schedules, to see who is on leave in a calendar view, according to selected leave types. This may help inform decisions about whether leave should be granted or not.

We'll provide an update as soon as we have more information on the release date for this report.

User guides and HR guidance

The following user guides have been updated since the last of these briefings was issued.

Code	Title	Update	Audience
PM-1066	How to allocate checklists and tasks	Updated task names: "Upload Proof of Right to Work (RTW)" and "Verify uploaded RTW evidence and expiry date" Checklists will automatically be assigned to the primary assignment Info given on advanced search to locate pending workers. Transfers and additional assignments - updated to clarify that SDAs need to add internal transfers checklist manually.	School/dept. admin

		Changed wording on HR Ops task to 'add work schedule and upload contract to Document Records'.	
PM-1051	How to create and manage job offers	Clarified action reason to be chosen in guidance: "Transfer"/ "Add Assignment" for internal hires. Information added on internal and external attachments. New job offer process added including hyperlink to templates. Extend job offer added back in as SDA task.	Hiring manager, school/dept.admin and business support
PM-1118	How to process terminations	Amended to reflect that guaranteed hours contracts need to be extended by one month on termination until phase 2 implementation.	Line manager
PM-1033	How to apply (External Candidate)	Added info on filtering job results. Date of birth field and CV now mandatory. Request to add NI number added in. Added steps to update personal details.	Candidate
PM-1014	How to Create and Maintain a Job Requisition	Added info on how to delete job requisition (not submitted). Added info on how to cancel a posted job requisition. Extra information added to stress importance of pre-screening questions to facilitate screening process. Notification now received when Ops are processing and when advert posted to careers pages.	Hiring manager and line manager and school/dept. admin and business support team
PM-1177	How to request contract generation	Removed full list of HESA classifications and added in hyperlink to correct page. New fields added to contract request task: <ul style="list-style-type: none"> - Add work schedule if not listed (offline process) - Still to be requested via HR Systems/service request) - Working abroad task - yes/no 	School/dept. admin
PM-C-001	Termination Checklist	Amended to reflect that guaranteed hours contracts need to be extended by one month on termination until phase 2 implementation.	HR Operations
PM-1087	How to assign a work schedule to an employee's assignment	Amended to reflect that need to always set the live work schedule to primary.	HR Operations
PM-1054	How to complete job offer checks	Removed 'Extend offer' steps. Added info not to reject job offer on the basis of incorrect hire reason and informed of merge capacity at move to HR stage. Documents can now be internal or external. External-facing documents are stored in Documents of Record. Internal are for hiring manager/SDA only.	HR Operations

As user guides are constantly being updated and refreshed, please avoid saving copies into personal drives and folders to ensure you're always accessing the most up to date information.

Likewise, we are making small changes to the forms as a result of your feedback (eg: we updated the JRBC so it is now editable) so please always use the copy on the [A -Z of Forms](#) webpage.

HR Helpline service requests

We continue to ask you to check My Knowledge whenever you can to try and find an answer to your question. Several articles have been updated recently, so it is important to always check there first.

If you still can't find the answer you require, please raise a service request. This will either be answered by the HR Helpline team or progressed to one of the Tier 2 teams.

Currently the HR Helpline are responding to Enquiry SRs within about 30 Hours, so slightly over the 24-hour SLA. On average they tend to receive and respond to between 60-80 SRs a day (excluding the SRs which are escalated Tier 2 teams).

Phase 1 wrap-up

We have recently established a sub-group of the People and Money Board to review and provide oversight of the outstanding work required to close off phase 1. This will support the implementation/embedding of the phase 1 end-to-end processes underpinned by the system, within the resources allocated from the programme team and the business areas represented.

We are prioritising the feedback we've received, which has spanned processes, ways of working, systems, training and education. We're focussing on resolution of defects, functionality which doesn't work as designed and three prioritised process areas - recruitment, onboarding and job changes – as well as the following items which have a phase 2 or 3 impact:

1. Development of end-to-end process descriptions – covering the entire process from start to finish, with both on and offline steps
2. Development of Business User Guidance
3. 'Musts' not otherwise covered by above
4. Reporting

We are looking at end-to-end processes guidance for on and off-system steps and are working with a group of business colleagues to ensure they have a user focus. Other aspects like the review of notifications will also be included in the Phase 1 wrap-up.

We're looking at how we can improve communication on the known issues with colleagues.

Finally, we are conducting a review of the assignment of the SDA role and the visibility of information for other role holders.

Phase 2 walkthroughs and user acceptance testing (UAT)

We've now completed user acceptance testing (UAT) for the guaranteed hours module and have received feedback on the user guides. We'll start UAT for the time recording part of the system shortly.

Final thoughts

Thank you for your support as we continue to address issues and improve our ways of working using the People and Money system. We appreciate it's not always easy, but we are determined to make improvements following phase 1 delivery as well as looking forward to phases 2 and 3.