Introduction

Prior to the administrative process, the University Teacher (UT) requirements for each module will need to be established and approved by members of staff who have responsibility for teaching budgets and allocations within the School, i.e. Operations Managers, Associate Dean (Teaching) and/or Learning & Teaching Co-ordinators. It is at each School's discretion how this is managed.

Further information

- A diagrammatic view of the University Teaching process is available in Appendix A.
- Guidance for University Teachers is available at: **http://www.lboro.ac.uk/services/hr/a-z/university-teacher-guidance.html**
- HR policy information for the employment of University Teachers is available via the HR webpage (see University Teachers Policy Information under the A-Z).
- Queries regarding the administration of University Teaching should be sent to: UT.Support@lboro.ac.uk.

Document format

1. Step-by-step instructions are shown as numbered lists

Note: Additional information to note is highlighted blue

Policy: Policy information is highlighted orange

Email templates are highlighted green

Contents

Summary of process for administrators

<u>Step by step guidance</u>

The process for issuing contracts and thereafter getting my.HR is as follows:

1. Send the most recent submission spreadsheet with the new university teacher name and details as an attachment in an email to ut.support@lboro.ac.uk. This spreadsheet template is in your HR-UT-<school-name> workspace.
2. Send the portal link to the new teacher.
3. The teacher should click on the link in the email, and register a 'new user' with a personal email address, username and password (not their Lboro one as it won't accept it.)
4. Teacher fills in the Personal details form. Once finished, all sections will have a green tick beside them and the Submit button will appear.
5. They must click the Submit Form button on that form, and ensure they click it again on the next page where it asks them if they're happy to submit
6. We will send a contract called "Contract of Employment – Loughborough University" to their email address (that they registered at stage 3.) It will come from hronline-noreply@lboro.ac.uk
7. Once they have this, they can click on the Contract acceptance form button in their contract and go through the acceptance portal in the same way as Step 4. This is just a tick box on a form so it's not filling in a full form again.
8. We will receive this acceptance, and provide my.HR access with a University username and password (takes 24 hours at least from acceptance)

9. You as authorisers of claims will receive an email when we've done this.
   a. If they are a postgrad student doing teaching work, they will keep their PGR student username and password for my.HR. They will be able to log into my.HR at least 24 hours after accepting their contract, with their usual Lboro log in.
   b. If they are not a postgrad student, they will get an automatic username and password created for them by IT services within 24 hours. Contact your IT co-ordinator with the person's staff number to retrieve their username and password for them. The teacher can ask ut.support@lboro.ac.uk to keep an Lboro account they may already have if they don't want a new one.
10. When the e-mail has been received that the university teacher has been transferred into their position the Immigration check should be completed on I trent for **all university teachers (including postgraduates).**
11. Staff cards for University Teachers (who are not postgraduates) need to be requested by e-mailing hr@lboro.ac.uk. University Teachers will have needed to provide a photo on their personal details form for the card to be printed.
12. Next year if they are continuing to teach, they will not need to do this process again.

Summary of process from University teacher point of view

1. **Click on the portal link in the e-mail sent by your department, and register a 'new user' with an email address, username and password.**
2. **Once you've set up your user details, fill in the Personal details form. Once finished, all sections will have a green tick beside them and the Submit button will appear.**
3. **Click the Submit Form button on that form, and ensure you click it again on the next page where it asks if you're happy to submit.**
   When you've done this HR will send a contract called "Contract of Employment – Loughborough University" to your email address (that you registered at step 1.) It will come from hronline-noreply@lboro.ac.uk
4. **Once you have your contract, review the contract information and click on the Contract acceptance form button in the contract and go through the acceptance portal. Log in with the same user and password as you set up in Step 1. This form is just a tick box; ensure you submit it in the same way as Step 3.**
   Upon receipt of acceptance, HR adds you to the system and provides my.HR access with an <u>automatically created University username and password</u>. For Post Graduate students doing teaching work, you can use your normal Lboro log in.

   <u>(Allow at least24 hours after acceptance before trying to log into my.HR).</u>

5. **When you accept your contract, you'll get an email with instructions to contact ut.support@lboro.ac.uk if you want to keep your current Loughborough username. Your department will be able to retrieve your automatic account information from IT co-ordinators in the department** *(at least 24 hours after acceptance)*
6. **A staff card will be requested by your department if you are new to the University as a teacher. If you are a PhD student, your card does not need replaced.**
7. **Next year if you are continuing to teach, you will not need to do this process again.**

8. **Claim for your teaching work through my.HR. Log in with your University username and password** *(see step 5 for information on where to get these login details)*; **the link to my.HR is available here www.lboro.ac.uk/internal**

9. **Deadlines on when claims should be submitted for payment, and guidance for claiming can be found here, under Section 6.**
   http://www.lboro.ac.uk/services/hr/a-z/university-teacher-guidance.html

Section 1 – Collating data and requesting University Teacher records in iTrent

1. For each module requiring University Teacher support, you will need to collect and collate the data outlined in your School's **University Teacher Submission** spreadsheet, which can be found in your School's HR-UT workspace. Please email UT.Support@lboro.ac.uk if you, or a colleague, need access to this workspace.

2. On the submission spreadsheet please complete all columns using drop down boxes where appropriate. For Loughborough London **only** in the notes column please state the location of London when required (default is Loughborough).

*Policy: Each University Teacher will have a **single pay rate** at which they will be paid for all work connected with University Teaching in that year. **It is not acceptable to pay different rates for Administration, Tutorials, Lecturing and Demonstration.***

Policy: If you plan to pay a University Teacher outside of the standard rates the Dean's approval must be sought prior to the appointment (ie. Grade 8 or above or within the contribution grade for a range). Please obtain approval by email and send this to UT.support@lboro.ac.uk.

Policy: If a University Teacher worked more than 488 hours in the previous academic year, they will automatically receive an increment on their pay scale for the upcoming academic year, provided they are not already on the highest spinal point of their current grade. University Teachers who worked fewer than 488 hours in the previous academic year will not receive an increment.

Policy: PhD students should not undertake more than 6 hours of teaching per week average out of the year.

*Policy: Research Associates can do 6 hours teaching per week as part of their contract and therefore do **NOT NEED** an additional UT position. There may be exceptions which will need to be agreed with the Hr adviser.*

3. Save the completed University Teacher Submission spreadsheet into your School's HR-UT workspace and email the spreadsheet to UT.Support@lboro.ac.uk.

4. If you need to submit additional University Teachers, complete and email a new blank version of the University Teacher Submission spreadsheet to UT.Support@lboro.ac.uk. Keep a local MASTER version with all University Teachers listed and the modules they are teaching on as you will need this information to authorise claims later in the process.

Note: *If a Postgraduate University teacher is to continue teaching once they have passed their PhD they will need a new position as a University Teacher as the terms and conditions of the contract are different. Please complete the submission form with all their details and state this is a replacement position. Please e-mail to* UT.Support@lboro.ac.uk.

Section 2 – Requesting submission of personal details from University Teachers

1. In early September, send the email below to University Teachers who **did not** work in the previous academic year requesting that they submit their personal details via the **University Teacher Personal Details Portal**.

   Note: *A specific link for your School/Department will be sent to you by* UT.support@lboro.ac.uk *in time for the start of each academic year.* ***Please do not re-use a link from a previous year as this may change.***

   *Dear **<<University Teacher>>***

   *I understand that you will be providing teaching for the School of **<< name>>** at Loughborough University during the **<<--/-->>** academic year.*

   *In order for us to create a record for you within our system that will enable you to claim payment for the work you complete, I would be grateful if you can submit your personal details via our secure **<<University Teacher Personal Details Portal>>**.*

   *If you have not used the portal before you will need to create a new account using **a personal email address**. Please note, if you have an existing @lboro.ac.uk email address you **will not** be able to use this to create a new account in the portal.*

   If you have any queries regarding this, please do not hesitate to contact me.

   Best wishes,

   <<School UT Administrator name and contact details>>

2. Send the email below only to University Teachers who **did** work in the previous academic year, requesting that they check and update their personal details via **my.HR**.

   *Dear **<<University Teacher>>***

   *I understand that you will be providing teaching for the School of <<School name>> at Loughborough University during the **<<--/-->>** academic year.*

   I would be grateful if you can check and update your personal details (if required) via our secure my.HR portal.

   If you have any queries regarding this, please do not hesitate to contact me.

Best wishes,

<<School UT Administrator name and contact details>>

Section 3 – University Teacher contracts and schedules of work

Note: Once a University Teacher has a record in iTrent, they will be emailed a contract (There are different types as a Postgraduate University Teacher has different terms and conditions to a University Teacher).

1. The School should send Schedules of Work to their University Teachers (example below). This should include the type of work they will be doing; the date, time and venue, including a campus map link; and the number of hours they should claim for, including a breakdown of contact time and, if applicable, preparation time. The schedule of work should not duplicate information held in the contract.

   *Dear **<<University Teacher>>***

   Schedule of work for <<Module Code>> - <<Module Title>>

   Thank you for agreeing to work on the module above. Please find confirmation details below.

Type of Work	Date	Time	Venue	Claim hours
Seminar	20/10/2014	10:00-12:00	SMB.0.08 (campus map link)	2 + 1 for preparation

   *Guidance for University Teachers is available on the University website here: **<<link>>**.*

   If you have any queries during your employment at Loughborough University, please do not hesitate to contact me.

   Best wishes,

   <<School UT Administrator name and contact details>>

Note: A report showing you which University Teachers have accepted their contracts will be automatically generated and saved into your School's HR-UT workspace on a daily basis, overwriting the previous version.

1. Check your School's report and establish if you have University Teachers who are due to start work but who have not yet submitted their personal details and/or accepted their contracts.

2. For University Teachers where this is the case, send them the email below and copy in the relevant Module Leader and the School's ADT/Learning & Teaching Co-ordinator.

*Dear **<<University Teacher>>***

*Our records show that you are due to commence work in the School of **<<School name>>** on **<<exact start date>>** but that you have not yet submitted your personal details through our secure online portal (link) and accepted your contract.*

We regret you will be unable to take up your employment until you have completed the necessary online forms.

If you have any queries regarding this, please do not hesitate to contact me.

Best wishes,

<<School UT Administrator name, contact details>>

Note: *University Teachers, who return in a subsequent academic year, will not receive a new contract in each new academic year. They may, therefore, seek clarification from you of what their current rate of pay is and you can email UT.Support@lboro.ac.uk to find out for them.*

Section 4 – UKVI immigration requirements

Policy: UK Visa and Immigration (UKVI) requirements
In order to comply with the Immigration, Asylum and Nationality Act 2006, University Teachers must produce the following documents **before** *commencing any work:*
a) *Original valid passport and, where appropriate, a visa OR*
b) *For UK Nationals, a full birth certificate issued in the UK which includes the name(s) of at least one of the holder's parents together with an official document containing your National Insurance Number and your name issued by a Government agency or previous employer.*
Non-compliance with these immigration regulations could result in severe penalties to the University as an employer.

Policy: Tier 4 Visa for sponsored international students
PGR and taught students should only work 20 hours a week in a 7 day period during term time in all UK employment. **IMPORTANT: The UKVI define a working "week" as a period of 7 days beginning with a Monday.** *In line with the University policy, this restriction will also apply to PGR students during all vacation periods. Any exceptional circumstances need to be agreed by the Director of HR.*

Note: *If you have any queries regarding immigration checking, email* HRimmigration@lboro.ac.uk.

Monitoring compliance with UKVI requirements

Note 2017 amendment: *You will have the responsibility for immigration checking ALL University Teachers on a casual contract* **BOTH** *PGR and non-PGRs. An immigration report title 'UT Immigration Check's will be automatically generated and saved into your School's HR-UT workspace on a daily basis, overwriting the previous version.*

1. Check your School's immigration report to establish if any of your University Teachers on casual contracts are due to start work but have not yet passed the immigration check.

2. For University Teachers who have not yet passed the immigration check, send them the email below and copy in the relevant Module Leader and the School's ADT/Learning & Teaching Co-ordinator

*Dear **<<University Teacher>>***

*Our records show that you are due to commence work in the School of **<<School name>>** on **<<exact start date>>** but that you have not yet produced your documentation demonstrating your right to work in the UK. In order to comply with the Immigration, Asylum and Nationality Act 2006, you must produce the following documents before commencing any work:*

a) Original valid passport and, where appropriate, a visa.
OR
b) For UK Nationals, a full birth certificate issued in the UK which includes the name(s) of at least one of the holder's parents together with an official document containing your National Insurance Number and your name issued by a Government agency or previous employer.

You should bring these documents to **<<UT administrator>>** in **<<building_name>>, <<room>>**.

If you do not have the relevant document(s), please contact the above named person immediately to discuss this. We regret you will be unable to take up your employment before satisfactory evidence of permission for this is provided.

Best wishes,
<<School UT Administrator name, contact details>>

Checking and copying documentation

Taking copies of Right to Work information – new checks

HR have central responsibility for conducting the Right to Work checks, and therefore are required to take copies of documentation for all staff* including the casual workforce.

***Note exception may be made to Loughborough London and UT Administrators – they will be required to scan the documentation in the same way as HR.**

- To conduct a Right to Work check, first ensure you have had the training – discuss this with hrimmigration@lboro.ac.uk.
- Online guidance is also available supplementary to formal training.
- Next, familiarise yourself with the guidance online for which documents can be provided.

When you do a right to work check is crucial – it must be before the person has done any work. This means 'same day checks' are not acceptable; if the person is due to work on a Saturday and we have no valid and in-date copy of their documents on Friday, they cannot work.

Taking the check
When the applicant arrives for their appointment check that -

i) it is not 'reasonably apparent' that the documents are false,
ii) the person in front of you looks like the person on the document,
iii) the passport is in date (for international passport holders),

iv) the visa is in date and not within an expired passport,

v) the type of visa they hold allows them to work for you,

Take a copy of the document(s) provided by scanning them.

1. Log into the printer with your staff card
2. Go to the 'Email' function on the printer touchscreen
3. In the 'To' field change the recipient to adcs20@lboro.ac.uk , in the 'cc' field change to recruitment@lboro.ac.uk
4. In the 'Subject' field, the structure of the subject should be as follows

   "RTW <ONE unique identifier>" e.g.
   - Student number (e.g. RTW A123456)
   - National Insurance number (e.g. RTW JZ123456A)
   - Staff number (e.g. RTW 1110001)
   - BRP/visa number (e.g. RTW ZU1234567)
   - Passport number (e.g. RTW 123456789)

5. Place the documents in the scanning bed of the printer and then –
   a. click 'Configure' then "Yes" next to 'Job build' if you want to combine multiple document scans into one file before sending.
   b. Then go back and click 'Scan'. Repeat this step for every scan (of the same person's documents) that you do.
   c. Click Send when you've finished and the scan will be sent to claims.support@lboro.ac.uk as one file and automatically indexed in an unalterable format in the HR-Claims Sharepoint group.

It is imperative that if you are carrying out a RENEWAL check for a UT or London based casual on behalf of Loughborough's HR team, you must let HR Immigration know so that they can ensure the details on iTrent match the new documentation. You can do this by way of cc'ing HRImmigration into the emailed document.

The person who sent the scan will be logged as the person who took the check, along with the date and time that the scan was taken. The report at HR's end that links staff/applicants to their document will then be updated - the unique identifier will be the link between their document(s) and their personal record on iTrent.

Further details of conducting a right to work check can be found:

https://www.lboro.ac.uk/services/hr/immigration/righttoworkchecks/howtoconductarighttoworkcheck/

Section 5 – IT accounts, ID cards and Learn access

Note: *HR will produce ID cards only for University Teachers on casual contracts who did not work in the previous academic year. PhD students already have student ID cards. Upon request (email hr-@lboro.ac.uk*

HR will send the ID cards to the relevant School administrator and University Teachers will be advised who to collect these from in their contracts.

Note: *University Teachers on zero hours contracts (PhD students) will be able to login and claim using their existing student usernames and passwords. University Teachers on casual contracts will have an IT account generated automatically when they accept their contract and will be advised to collect their login details from the relevant School administrator in order to submit claims.*

1. Request IT login details from your School IT Coordinators for your University Teachers on casual contracts. Notify University Teachers when their login details and ID cards are ready for collection.

2. University Teachers for your School will automatically get the same building accesses as your core staff, however if you need to request additional building accesses, you will need to ask your Dean of School or Head of Department to email the request to: campus.card.desk@lboro.ac.uk.

   Note: *ID cards only will only remain active while the University Teacher has an active record in iTrent.*

3. If requested to do so by Module Leaders, add University Teachers as Additional Tutors in Learn.

Section 6 – Teaching assessments and observations

Note: *Centre for Academic Practice teaching assessments: PhD University Teachers are required to attend Teaching Skills courses delivered by the Centre for Academic Practice as part of their Professional Development. They will not, therefore, be required to undergo Centre for Academic Practice teaching assessments. The Centre for Academic Practice will, however, receive a report of the names and employing Schools of University Teachers on casual contracts and may request your assistance to arrange a teaching assessment for one of these University Teachers.*

Note: *School teaching observations: the policy regarding School teaching observations for University Teachers is being finalised and will be communicated in due course.*

Section 8 – Authorising claims

Note: Each School requires two people who can authorise claims up to £1000 and one person who can authorise claims over £1000. If the claims approvers for your School need to be updated, please email UT.Support@lboro.ac.uk.

Note: University Teachers will submit claims via my.HR. They will input the actual date worked and the start of week and end of week date, to allow for tracking maximum 20 hours a week allowed for Tier 4 students. They will input the hours they are claiming for and also be asked to enter the module code in a free text box. A link to the University Module Catalogue is provided on-screen to assist University Teachers with inputting this information accurately. If you wish to analyse this data at a later stage, it will need to be checked beforehand in case of inaccuracies. In exceptional cases, a module code may not exist and University Teachers will be asked to input a short description instead.

Note: Each time a University Teacher submits a claim an automatic e-mail will be sent to the relevant authorisers.

1. Login to iTrent.

2. Select 'To do list' from links menu to see a list of the new claims that require authorisation and click on the claim you wish to view.

3. Check in your MASTER UT-submission spreadsheet that the claimant is allocated to the module they are claiming for. If it's out by a number or letter, you can change it on the claim form and save.

4. You can see a provisional cash amount for the claim if you click "Time and Expenses claim summary" on the left pane

5. Click the home page button at the bottom of the "Time and Expenses claim" page to return to the list of new claims requiring authorisation. The claim you have just viewed has the white check box ticked and an 'Actions' button is now visible. If you are applying the same action to multiple claims tick the relevant check boxes before selecting the appropriate action.

6. The following actions are available:

    a. Authorise the claim if the claimant is allocated to the module, the number of hours claimed seems reasonable and the claim value is less than £1000**.**
    Authorising a claim with multiple rows of modules/hours means ALL of the rows will be authorised. You can remove rows, or change details as the administrator and Save changes before authorising.

We would advise contacting the individual if you do change information on their claim, so they know ahead of receiving a payslip.

b. Select 'Claim over £1000' to refer claims to the next level authoriser in your School and it will then appear in their 'To do list'. They will receive an email that they have a claim over £1000 to authorise in iTrent.

Note: In the University Teachers' my.HR summary, claims over £1000 that are referred to the next authoriser will appear to have been rejected, however University Teachers will also receive an email notifying them that it is being considered by the next authoriser.

c. Select 'Detail change required' if you need to query the claim. Email the University Teacher separately to request confirmation of the missing or incorrect details**. Please be aware that this could result in a delay to their payment, therefore it should only be used if the hours claimed seem excessive or you cannot determine which module they are claiming for**. You can edit the module code field if it has been entered incorrectly and know what the correct code should be.

d. If the number of hours claimed seems excessive, email the module leader to request confirmation of whether the work has been done and can be authorised. If not, select 'Reject' and email the University Teacher to notify them of the reason their claim has been rejected.

Whatever the action taken, the task will disappear from your queue (and the queue of other authorisers in your area with the same authorisation permissions) and the claimant will receive an update of the status of their claim.