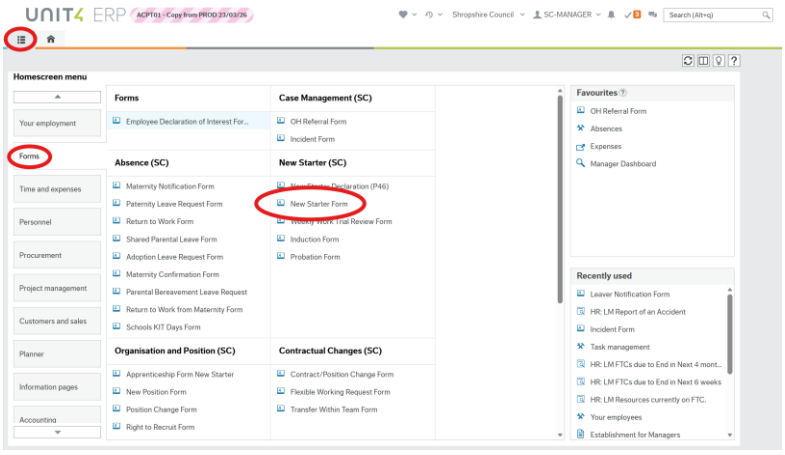
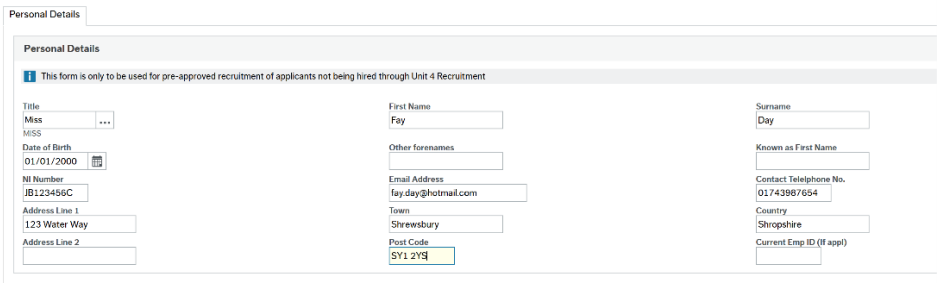
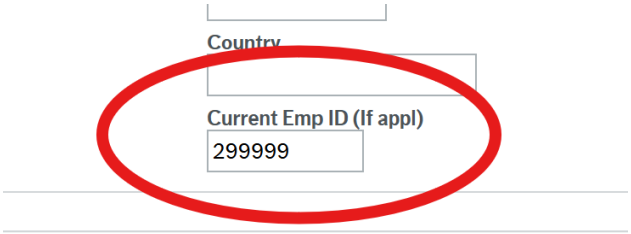
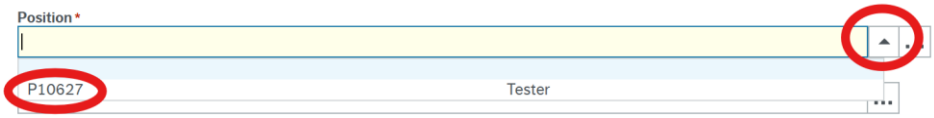
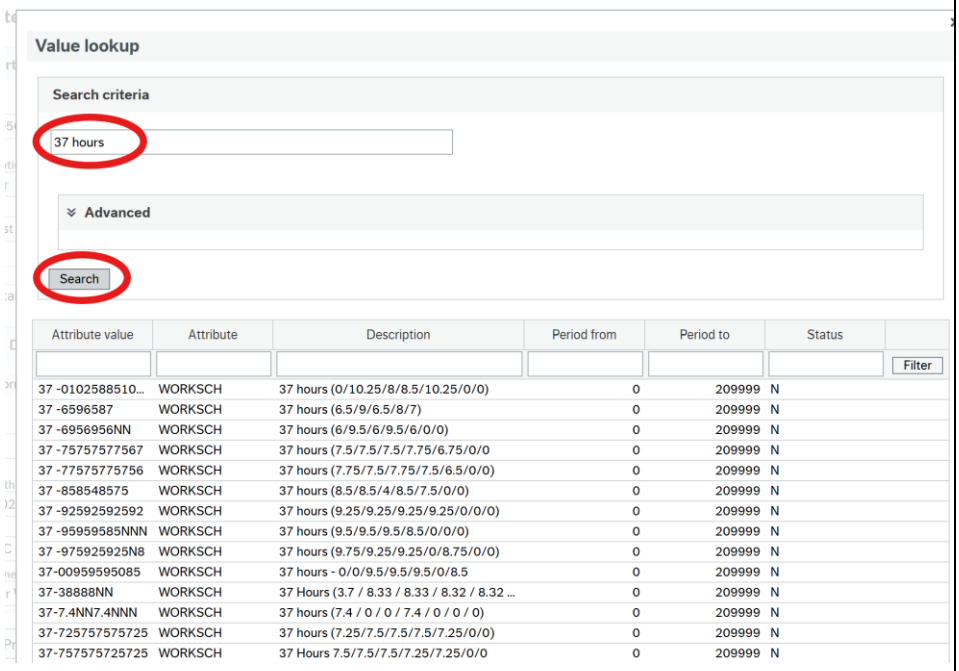
How to complete the New Starter Form in the ERP

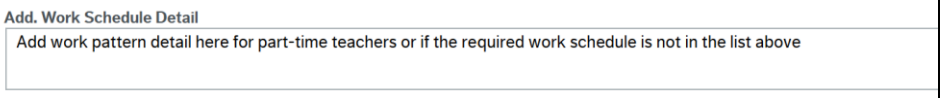
		Last Updated
1	Scope: This guidance is to show you how to use the New Starter Form in the ERP.	06.08.2026
2	Introduction: This guide provides information on the process of setting up a new starter into a position which already exists in your establishment.	06.08.2026
3	Navigate to Main Menu → Forms → New Starter → New Starter Form	06.08.2026
4	Step by step process	
4.1	To set up a new starter in an existing position that you have line manager responsibilities for, navigate to the **New Starter Form** in the ERP. This form is only to be used for pre-approved recruitment of applicants not being hired through *Unit4 Recruitment*. If you have a member of staff moving positions under your line management, you need to complete the Transfer Within Team form. Prior to completing the form, you will need to have saved all new starter documents to your device ready to attach to the completed form. 	24.08.2026

4.2	Complete all the relevant fields in the **Personal Details** section.  If the Resource already has an additional position within Shropshire Council, or if they may have moved from another team or school, they will already have a Resource ID, so enter this in the **Current Emp ID (If appl)** field.  Complete all the relevant fields in the **Position Details** section. In the **Position** field, press the *SPACEBAR* on your keyboard or click the arrow to populate the list of available positions in your establishment, select the relevant one and use the *TAB* key to populate the next two boxes.  To find the correct **Work schedule**, go to the **Value lookup** by clicking on the three ellipses on the right side of the field.  	

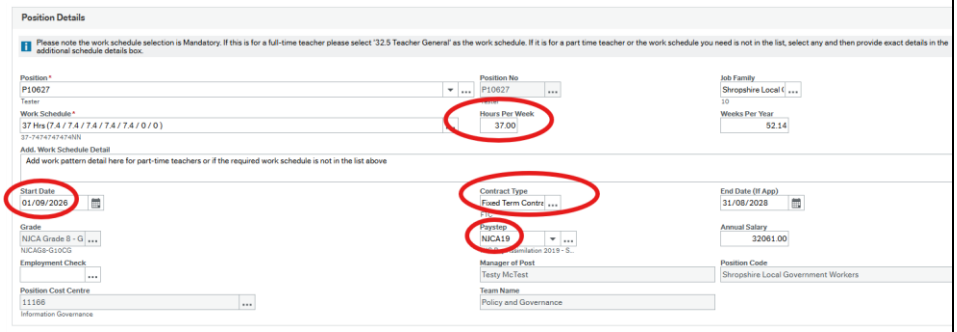
4.3	Type into the **Search criteria** field and click **Search** to bring through all options with those criteria. Select the correct work schedule for your employee. A typical full-time employee will be 37 hours (7.4/7.4/7.4/7.4/7.4/0/0)	



If this is for a full-time teacher please select **32.5 Teacher General** as the work schedule. If it is for a part time teacher or the work schedule you need is not in the list, select any and then provide exact details in the **Add. Work Schedule Detail** box.



Type in the **Hours Per Week** as a decimal (for example; 12 hours 30 minutes is 12.50.) Use the calendar to select the **Start Date.** Use the *SPACEBAR* to list the options for **Contract Type** and **Paystep** (completing this field will populate the **Annual Salary.**)

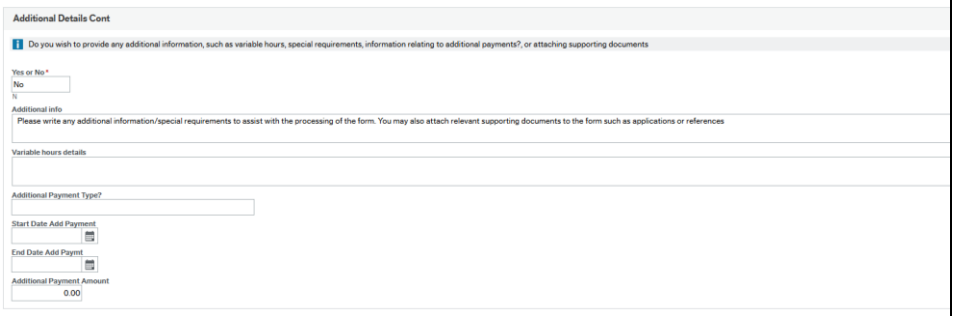
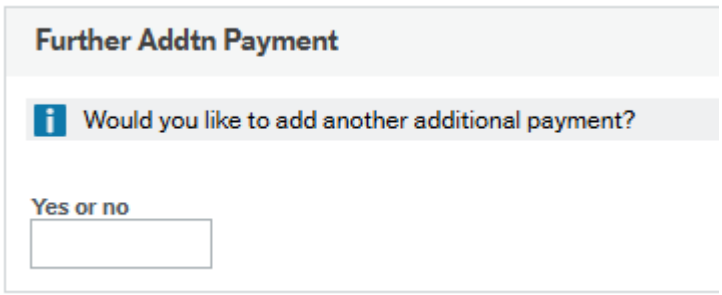


Some fields may only be necessary in certain circumstances (for example; **End date (If App)** only needs completing if it is a contract with a fixed term.)

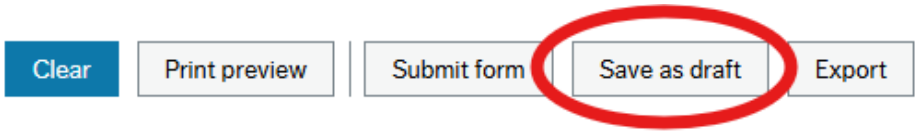
The ERP is set up to cease paying the employee on the **End Date** entered, therefore you must monitor and review **Fixed Term Contracts (FTC)** in a timely manner to ensure they are processed as a leaver (via the **Leaver Notification Form**) or a contract amendment (via the **Contract/Position Change Form**) is completed.

4.4 In the **Additional Details** section, confirm the **Reason for Recruitment** (press *SPACEBAR* to bring up the list of options), if relevant complete **Working Pattern (Corp)** (this does not apply to schools), **Essential Car User** (**Yes** or **No**), **Politically Restricted** (**Yes** or **No**), **Teacher DFE No** (applies to schools and new teachers only), **Reasons for Start (SCH)** (schools only to inform the *Schools Workforce Census*.)



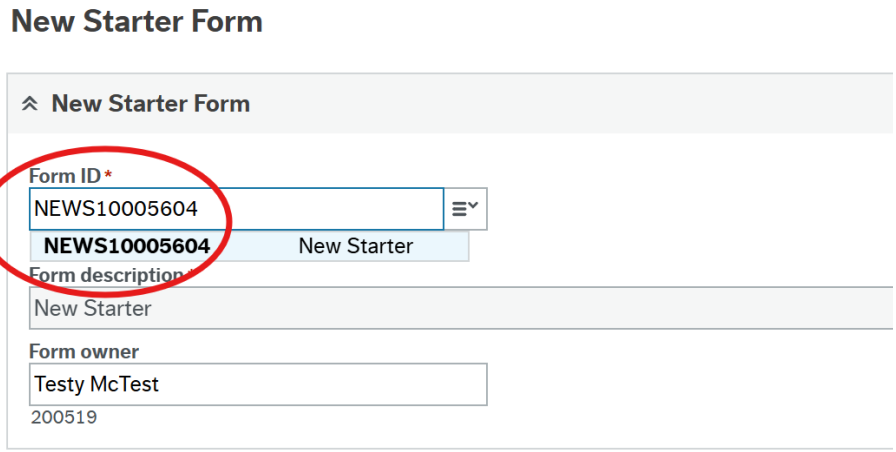
4.5	In the **Additional Details Cont** section, you need to select **Yes** or **No**. Select **Yes** if any of the following apply: • If you need to add additional information about the **Resource** (e.g. if they have an existing post within Shropshire Council and this is an additional position) • If the new **Resource** needs an additional payment (e.g. if it is a teacher and they require a *Teaching & Learning Responsibility Allowance*) • Add any variable hours contract details (e.g. if a teaching assistant position might need to do lunch cover) • Where the form is for maternity, sickness or secondment cover – detail the name of the person they are covering. Select **No** if you have nothing else to add to the form.  If you select **Yes**, click in the **Additional Info** box, read the text, then delete it and type your comments for *Payroll*. **Variable hours details** – type here any details of variable hours if appropriate. **Additional Payment Type**. Complete the start and end date of any temporary additional payments i.e. TLRs and SEN allowances. Enter the full amount for the allowance as the ERP will pro-rata it. If any **Further Addtn Payment** information is required, select **Yes** here and complete the additional fields.  	

4.6 You can now select **Save as draft** at the bottom to save the form.



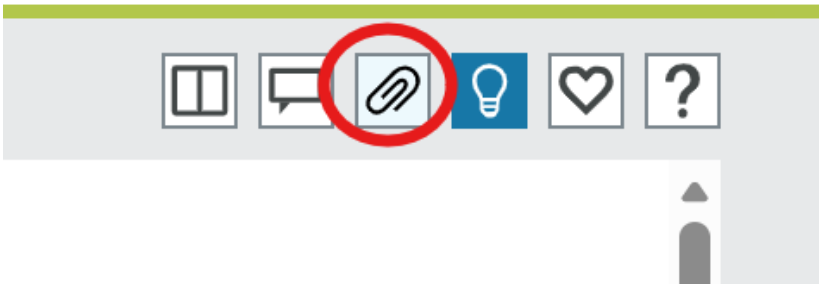
4.7 **Retrieving saved forms.**

To retrieve a form that has been saved as draft, go back into the form as if to complete a new form. Delete **[New]** in the **Form ID** field and press *SPACEBAR*, this will bring up your saved forms. Click on the form you are looking for and press TAB, the saved form will reload.

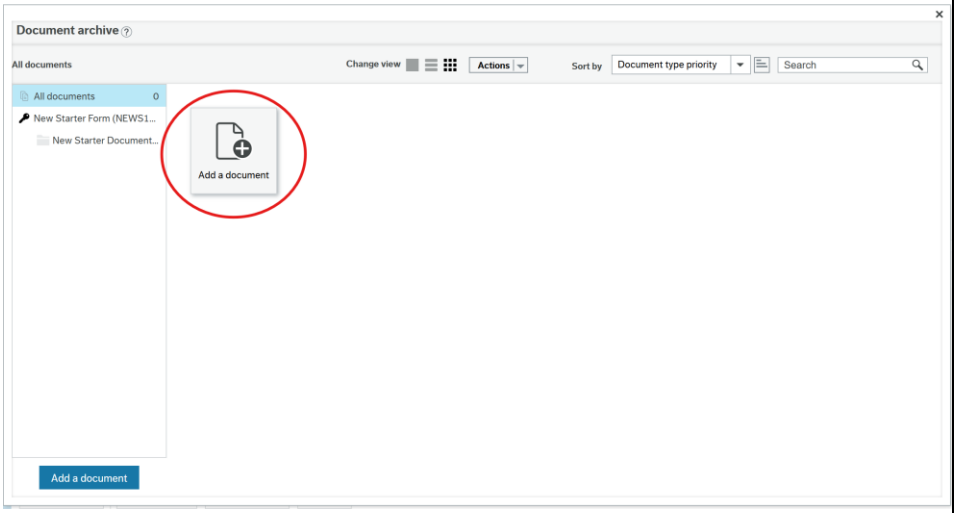


4.8 **Adding attachments**

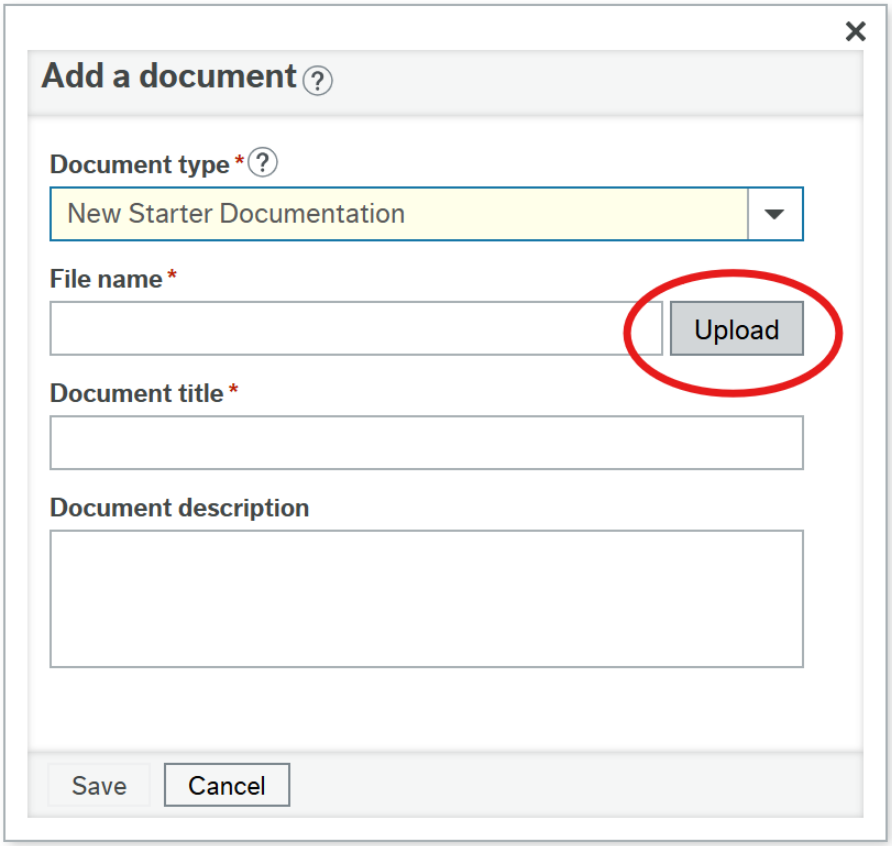
To attach any documents required for processing a new starter (such as Application Form, References, DBS Documentation, Certificates, Right to Work, Medical Approval, Medical Questionnaire etc), you need to click on the paperclip in the top right of the form.



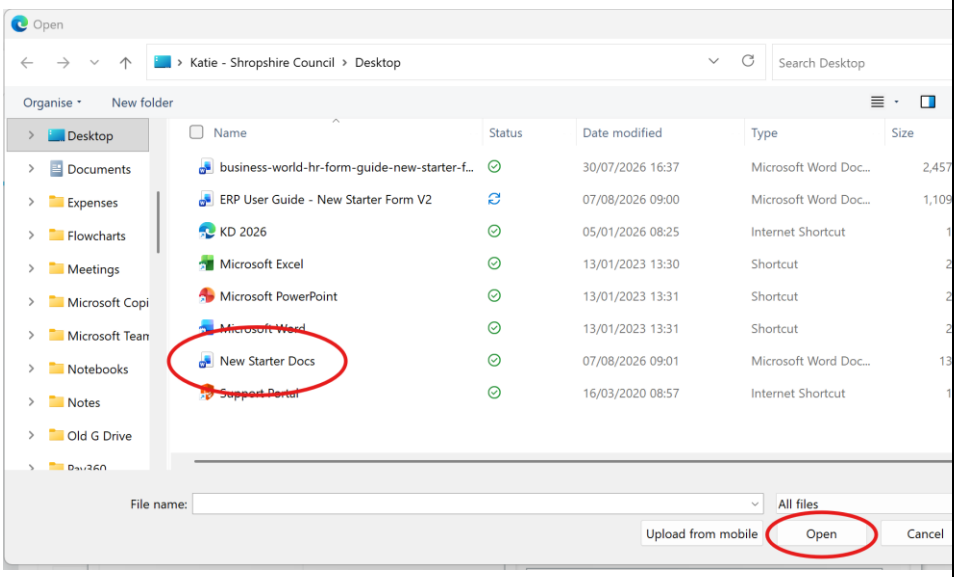
You will then see this screen below, click on **Add a document**.



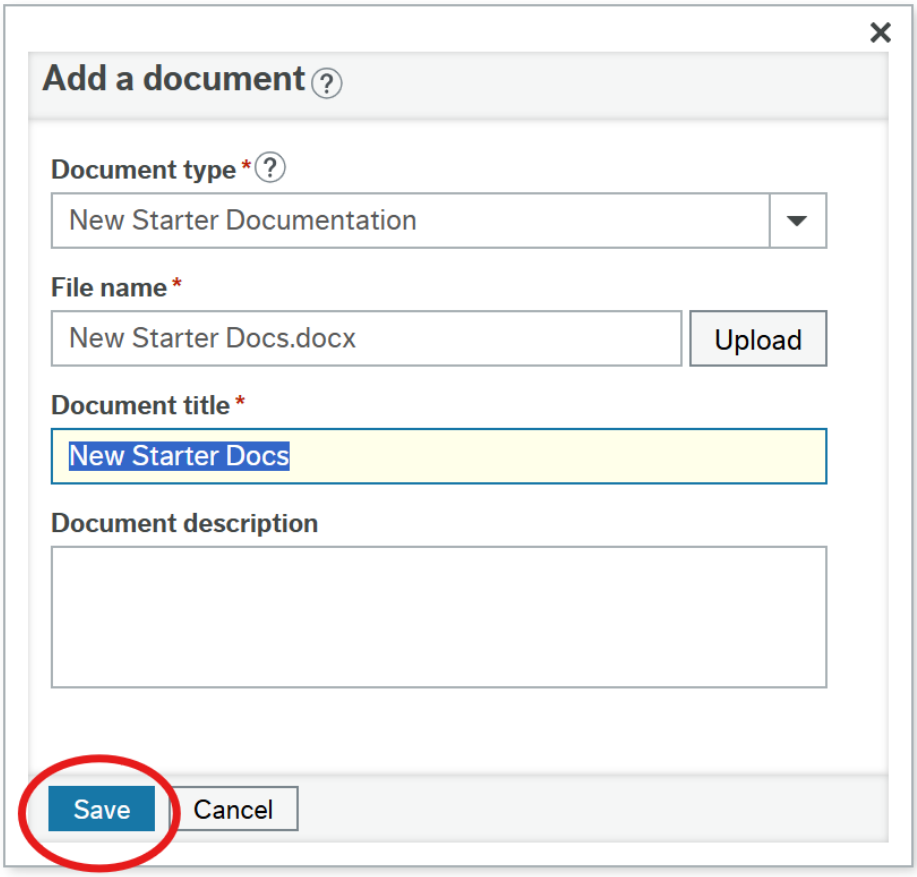
The document type will be **New Starter Documentation**. Click on **Upload** and select the required documents that you have saved on your device prior to completing the form.



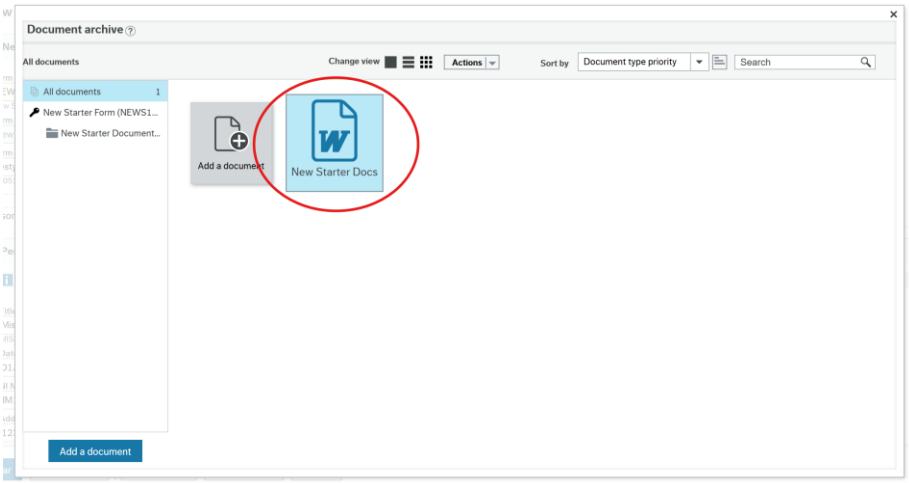
Go to the folder on your device, click on the document and select **Open**. Ensure you only upload the documents that are relevant to this Resource.



Then select **Save** to attach that document.



The document is now attached to that form and that Resource.



Then repeat until all the required documents are attached.

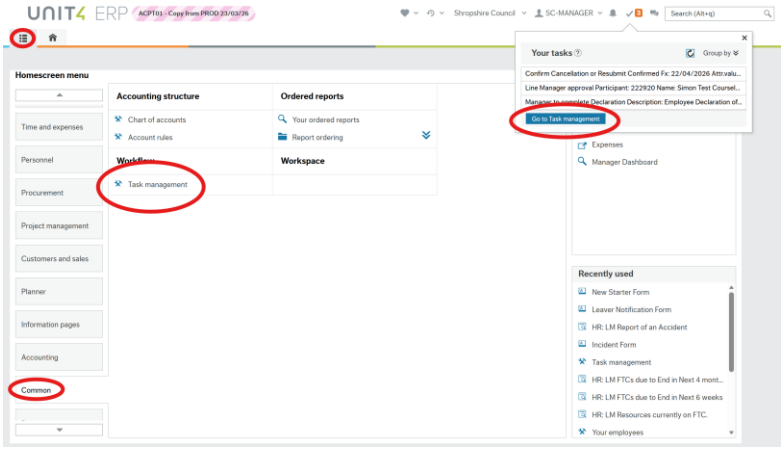
If you are not yet ready to submit the form, **Save as draft** again and come back to it later.
When you are happy that the form has been fully completed and all attachments have been added, select **Submit form** to send for approval and processing.



4.9 **Headteacher Approval**

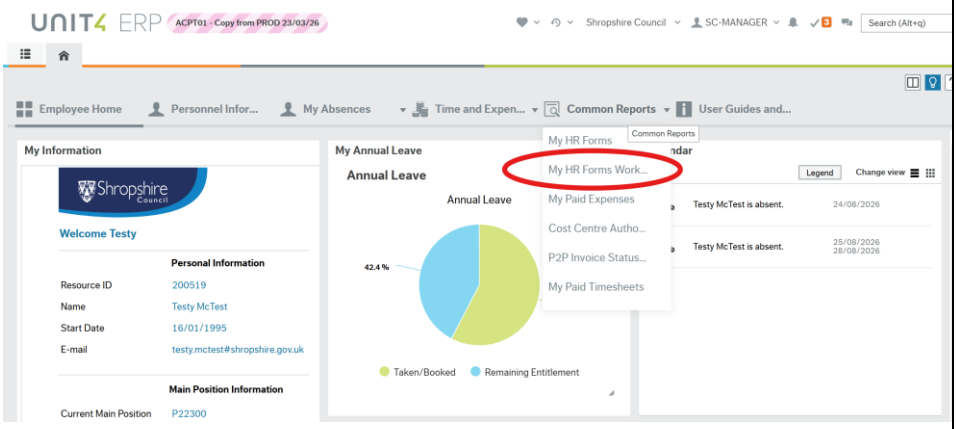
If the **New Starter Form** has been completed and submitted by an Office Manager or Administrator at a school, it will generally workflow to the Headteacher for approval.

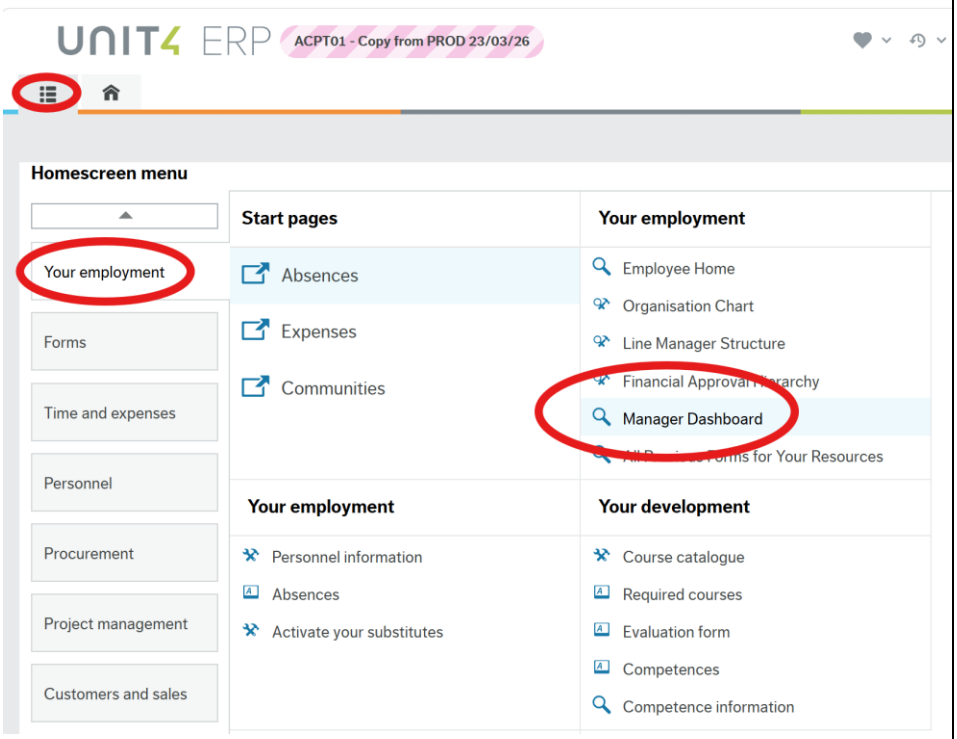
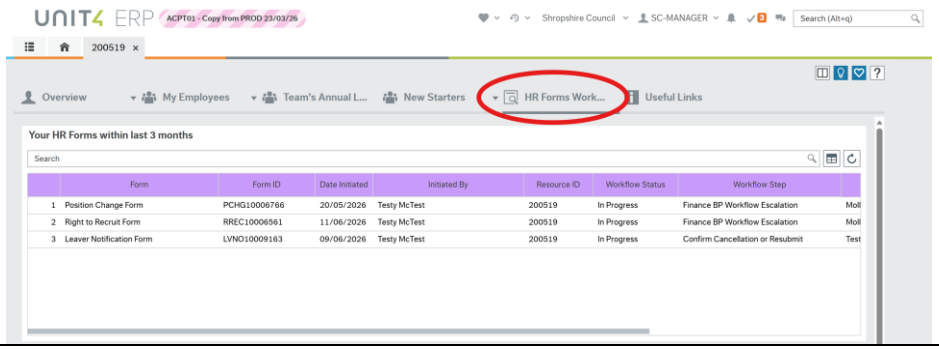
The Headteacher will receive a task in the ERP and should go to **Task Management** to deal with any task they may have. Click from the Tasks on the Global Toolbar or navigate to **Main Menu > Common > Task management**.



Go into the **New Starter Form** task. If all the details are correct, select **Approve.**
If the form is incorrect or has missing details, select **Reject** and explain why it has been rejected in the **Workflow log** comments.

4.10 To check progress of any forms, use the **My HR Forms Workflow Status** from the **Home Employee Dashboard.**



	Or the **HR Forms Workflow Enquiry** tab in the **Manager Dashboard** if you have line manager access in the ERP.   	
5	Related guidance and policies Video Links • New Starter Form in the ERP • How to use Forms in the ERP • Leaver Notification Form • Contract/Position Change Form • How to use Reports in the ERP • How to use Reports under Common in the ERP	03.11.2026