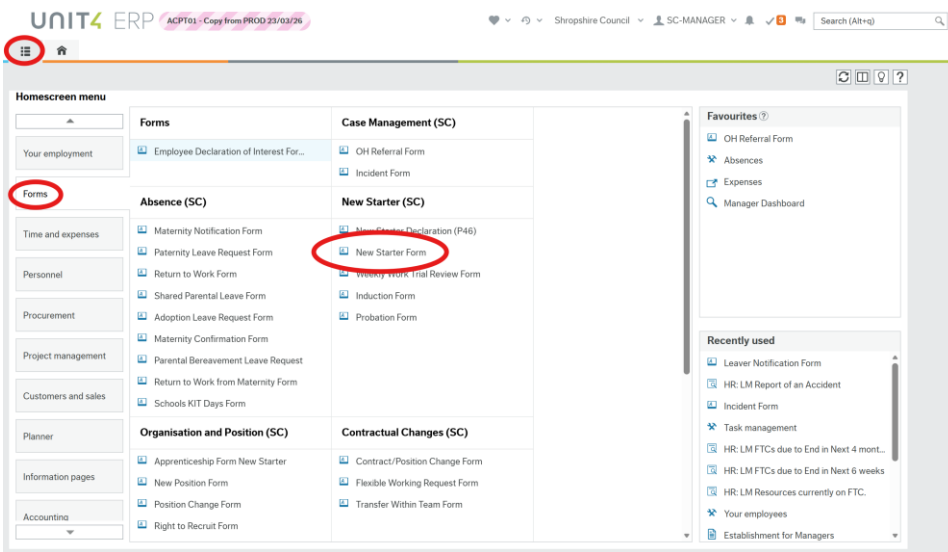


How to complete the New Starter Form in the ERP

		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 <i>Unit4 Recruitment</i>. 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. 	07.08.2026

4.2 Complete all the relevant fields in the **Personal Details** section.

Personal Details

This form is only to be used for pre-approved recruitment of applicants not being hired through Unit 4 Recruitment

Title Miss	First Name Fay	Surname Day
Date of Birth 01/01/2000	Other forenames	Known as First Name
Nr Number JB123456C	Email Address fay.day@hotmail.com	Contact Telephone No. 01743887654
Address Line 1 123 Water Way	Town Shrewsbury	Country Shropshire
Address Line 2	Post Code SY1 2YQ	Current Emp ID (If appl)

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.

Country

Current Emp ID (If appl)
299999

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.

Position *

P10627 Tester

To find the correct **Work schedule**, go to the **Value lookup** by clicking on the three ellipses on the right side of the field.

Work Schedule *

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)

Value lookup

Search criteria

37 hours

Advanced

Search

Attribute value	Attribute	Description	Period from	Period to	Status	
37 -0102588510...	WORKSCH	37 hours (0/10.25/8/8.5/10.25/0/0)	0	209999	N	
37 -6596587	WORKSCH	37 hours (6.5/9/6.5/8/7)	0	209999	N	
37 -6956956NN	WORKSCH	37 hours (6/9.5/6/9.5/6/0/0)	0	209999	N	
37 -7575757567	WORKSCH	37 hours (7.5/7.5/7.5/7.75/6.75/0/0)	0	209999	N	
37 -77575775756	WORKSCH	37 hours (7.75/7.5/7.75/7.5/6.5/0/0)	0	209999	N	
37 -858548575	WORKSCH	37 hours (8.5/8.5/4/8.5/7.5/0/0)	0	209999	N	
37 -92592592592	WORKSCH	37 hours (9.25/9.25/9.25/9.25/0/0/0)	0	209999	N	
37 -95959585NNN	WORKSCH	37 hours (9.5/9.5/9.5/8.5/0/0/0)	0	209999	N	
37 -975925925N8	WORKSCH	37 hours (9.75/9.25/9.25/0/8.75/0/0)	0	209999	N	
37 -00959595085	WORKSCH	37 hours - 0/0/9.5/9.5/9.5/0/8.5	0	209999	N	
37 -38888NN	WORKSCH	37 hours (3.7 / 8.33 / 8.33 / 8.32 / 8.32 ...	0	209999	N	
37 -7.4NN7.4NNN	WORKSCH	37 hours (7.4 / 0 / 0 / 7.4 / 0 / 0 / 0)	0	209999	N	
37 -725757575725	WORKSCH	37 hours (7.25/7.5/7.5/7.5/7.25/0/0)	0	209999	N	
37 -75757575725	WORKSCH	37 Hours 7.5/7.5/7.5/7.25/7.25/0/0	0	209999	N	

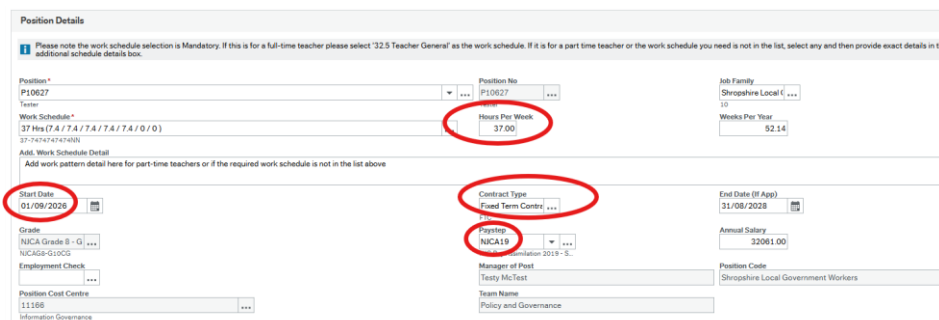
If this is for a full-time teacher please select **32.5 Teacher General** as the work schedule. If it is for a part time teacher or the work schedule you need is not in the list, select any and then provide exact details in the **Add. Work Schedule Detail** box.

Add. Work Schedule Detail

Add work pattern detail here for part-time teachers or if the required work schedule is not in the list above



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**.)



Position Details

Please note the work schedule selection is Mandatory. 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 additional schedule details box.

Position* P10627 Position No P10627 Job Family Shropshire Local Government Workers

Work Schedule* 37 Hrs (7A/7A/7A/7A/7A/0/0) Hours Per Week 37.00 Weeks Per Year 52.14

Start Date 01/08/2020 Contract Type Fixed Term Control End Date (If App) 31/08/2020

Grade NCA Grade S-G Annual Salary 22061.00

Employment Check Manager of Post Testy McTest Position Code Shropshire Local Government Workers

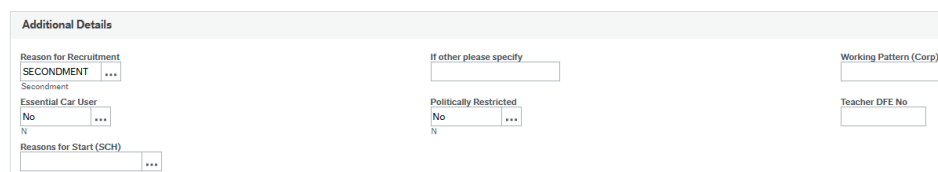
Position Cost Centre 11100 Team Name Policy and Governance

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*.)



Additional Details

Reason for Recruitment SECONDMENT If other please specify Working Pattern (Corp)

Essential Car User No Politically Restricted No Teacher DFE No

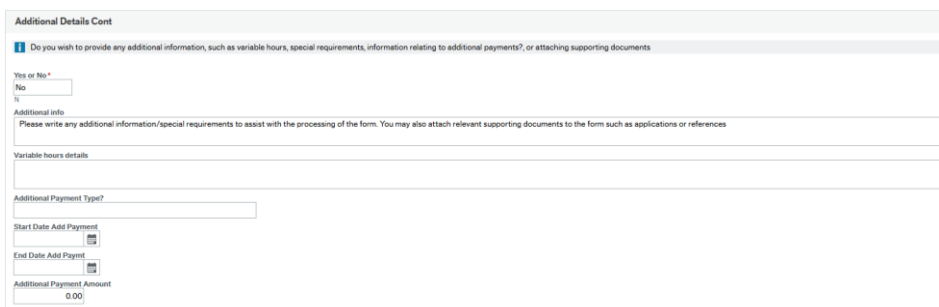
Reasons for Start (SCH)

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.

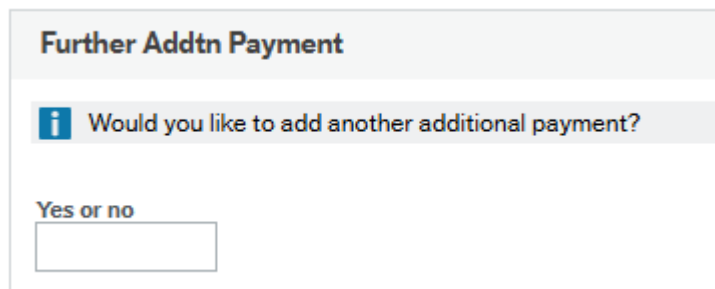


If you select **Yes**, click in the **Additional Info** box, read the text, then delete it and type your comments for *Payroll*.

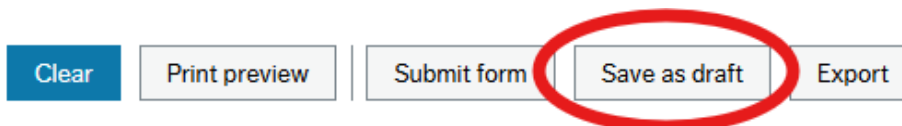
Variable hours details – type here any details of variable hours if appropriate.

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.



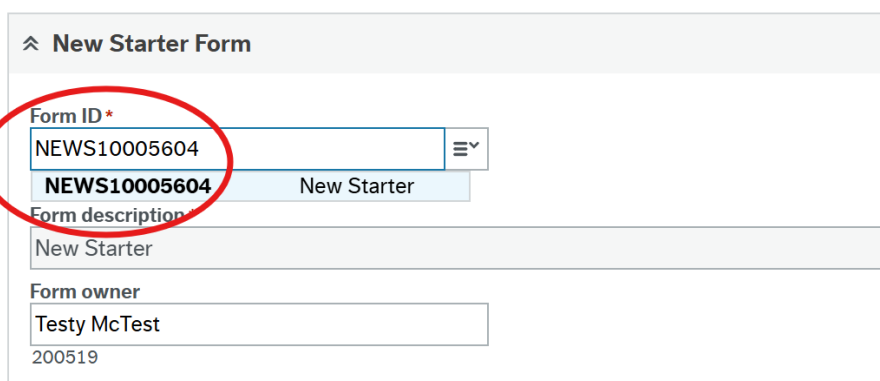

4.6 You can now select **Save as draft** at the bottom to save the form.



4.7 **Retrieving saved forms.**

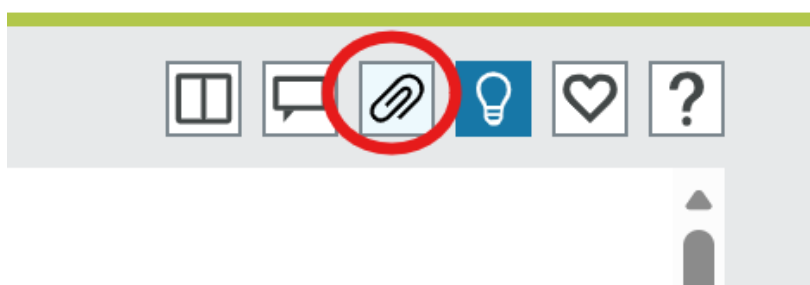
To retrieve a form that has been saved as draft, go back into the form as if to complete a new form. Delete **[New]** in the **Form ID** field and press **SPACEBAR**, this will bring up your saved forms. Click on the form you are looking for and press **TAB**, the saved form will reload.

New Starter Form

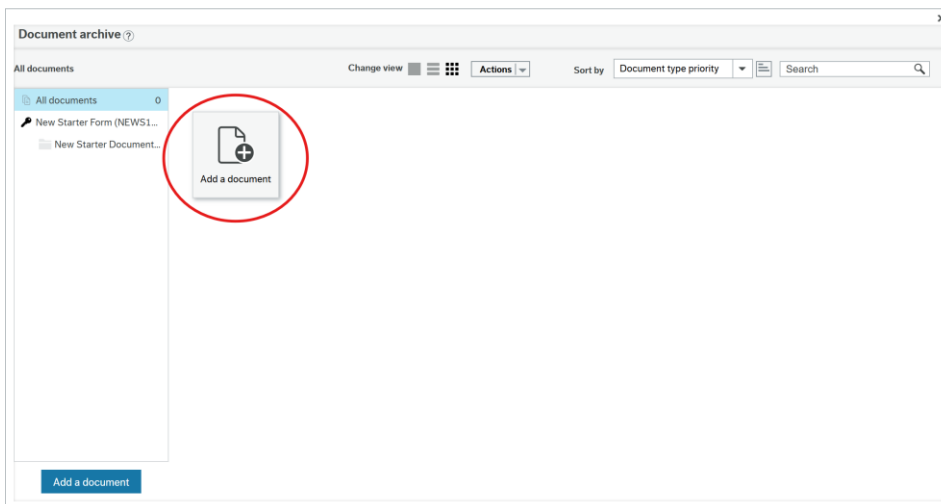


4.8 **Adding attachments**

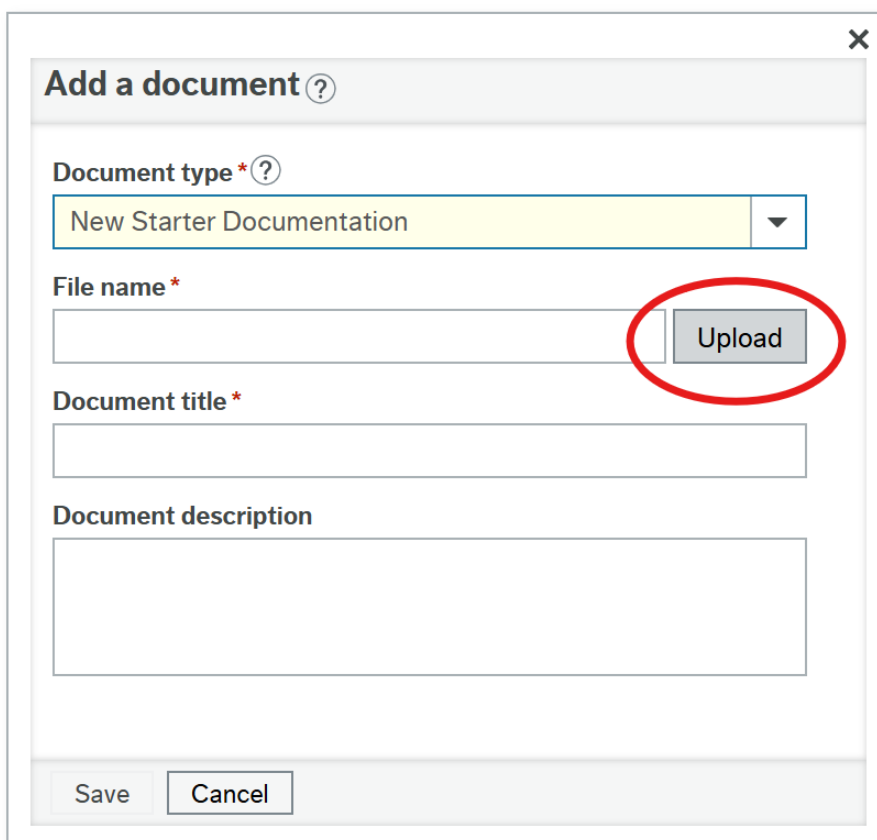
To attach any documents required for processing a new starter (such as Application Form, References, DBS Documentation, Certificates, Right to Work, Medical Approval, Medical Questionnaire etc), you need to click on the paperclip in the top right of the form.



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.



Add a document ?

Document type * ?
New Starter Documentation

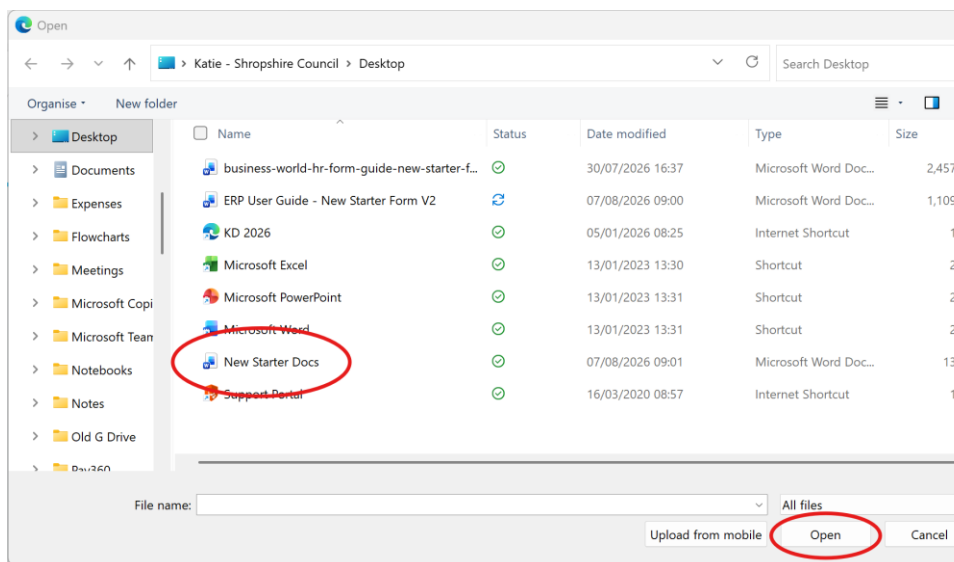
File name *
 Upload

Document title *

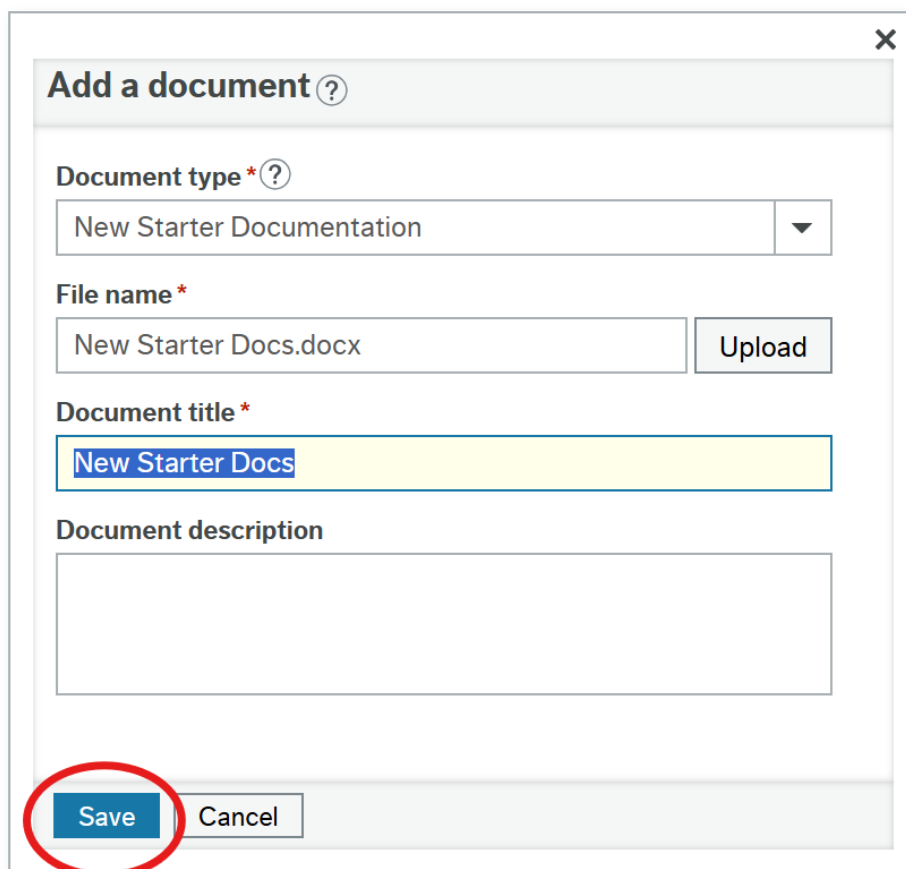
Document description

Save Cancel

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.



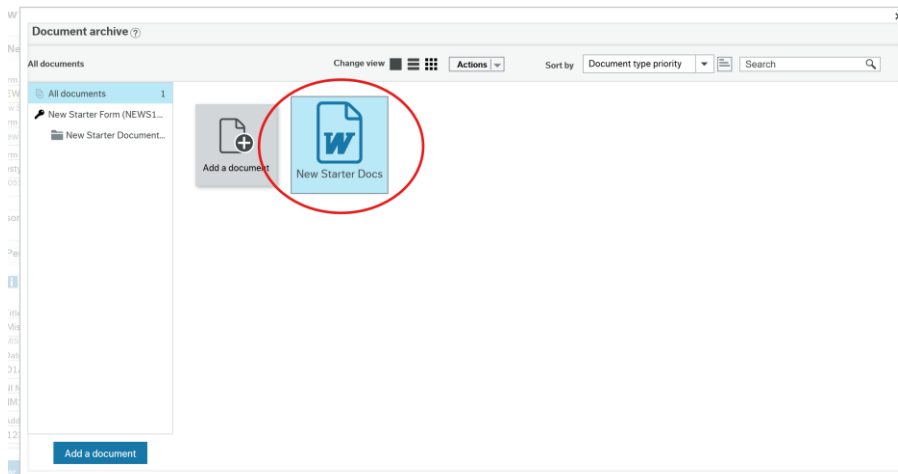
Then select **Save** to attach that document.



The screenshot shows the 'Add a document' form in the UNIT4 ERP system. The form has the following fields and buttons:

- Document type ***: A dropdown menu with 'New Starter Documentation' selected.
- File name ***: A text input field containing 'New Starter Docs.docx' and an 'Upload' button.
- Document title ***: A text input field containing 'New Starter Docs'.
- Document description**: A large text area for additional information.
- Save** and **Cancel** buttons at the bottom left, with the 'Save' button circled in red.

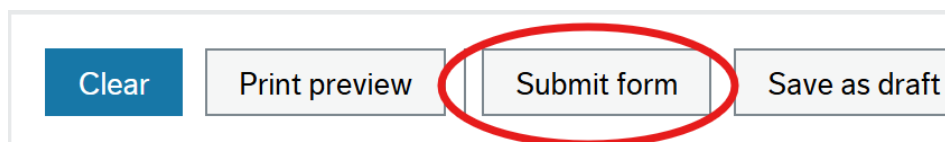
The document is now attached to that form and that Resource.



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.

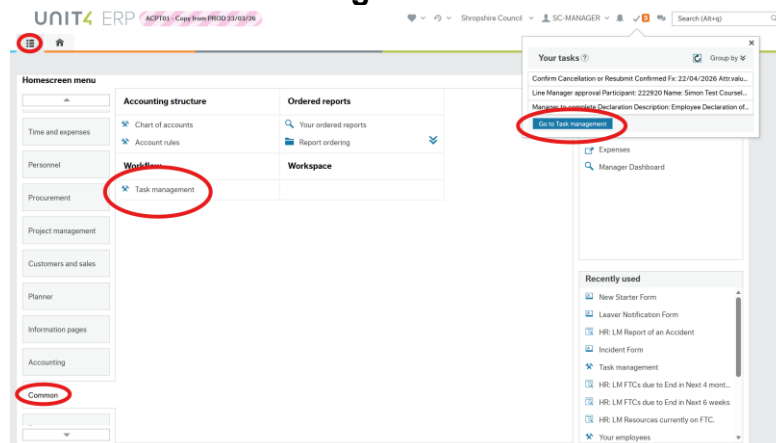
When you are happy that the form has been fully completed and all attachments have been added, select **Submit form** to send for approval and processing.



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**.

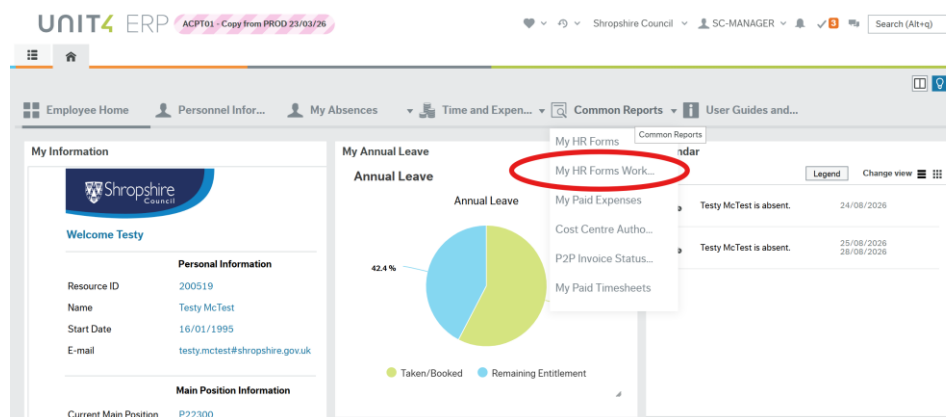


Go into the **New Starter Form** task. If all the details are correct, select **Approve**.

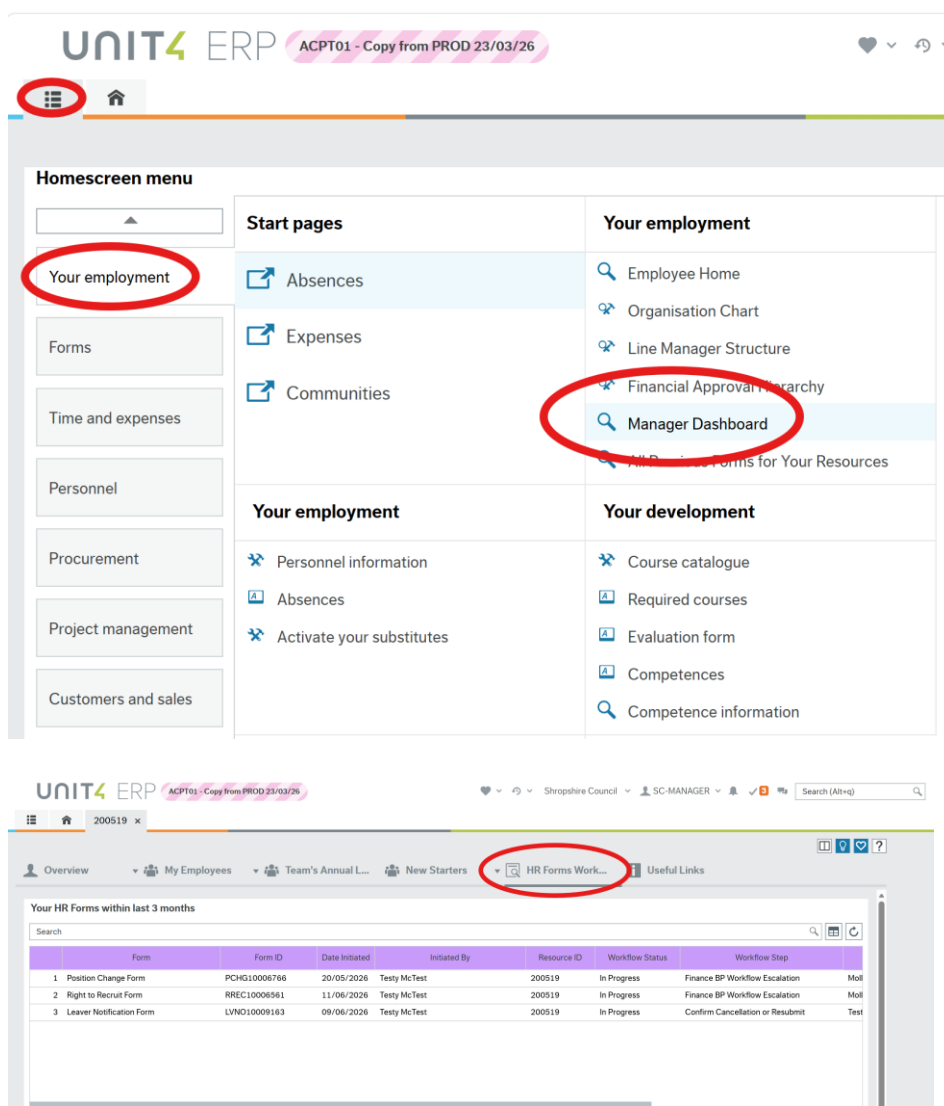
If the form is incorrect or has missing details, select **Reject** and explain why it has been rejected in the **Workflow log** comments.

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.



The screenshot shows the UNIT4 ERP interface. At the top, the header includes 'UNIT4 ERP' and 'ACPT01 - Copy from PROD 23/03/26'. Below the header, there is a 'Homescreen menu' on the left with options like 'Your employment', 'Forms', 'Time and expenses', 'Personnel', 'Procurement', 'Project management', and 'Customers and sales'. The 'Your employment' option is circled in red. To the right of the menu, there are sections for 'Start pages' (Absences, Expenses, Communities) and 'Your employment' (Personnel information, Absences, Activate your substitutes). Further right, there is a 'Your employment' section with 'Employee Home', 'Organisation Chart', 'Line Manager Structure', 'Financial Approval Hierarchy', and 'Manager Dashboard' (circled in red). Below this, there is a 'Your development' section with 'Course catalogue', 'Required courses', 'Evaluation form', 'Competences', and 'Competence information'. At the bottom, there is a 'HR Forms Workflow Enquiry' tab (circled in red) which displays a table of HR forms within the last 3 months.

	Form	Form ID	Date Initiated	Initiated By	Resource ID	Workflow Status	Workflow Step	
1	Position Change Form	PCHG10006766	20/05/2026	Testy McTest	200519	In Progress	Finance BP Workflow Escalation	Moll
2	Right to Recruit Form	RREC10006561	11/06/2026	Testy McTest	200519	In Progress	Finance BP Workflow Escalation	Moll
3	Leaver Notification Form	LVNO10009163	09/06/2026	Testy McTest	200519	In Progress	Confirm Cancellation or Resubmit	Test

5

Related guidance and policies

07.08.2026

Video Links

- [New Starter Form in the ERP](#)
- [How to use Forms in the ERP](#)
- [Leaver Notification Form for Managers](#)
- [Contract/Position Change Form](#)
- [How to use Reports in the ERP](#)
- [How to use Reports under Common in the ERP](#)



