

## Flexible Worker (FW) Submission Checklist

- Has the QlikView casual directory been checked to see if they are a current staff member?
  - Note the staff ID if found, care must be taken as there can be multiple individuals with the same name. Add the staff ID to the Flexible Worker Assignment Letter (FWAL).
  - If they have Existing FW post(s) - do they overlap with the new assignment?
  - Are there no results or the new Flexible Worker Assignment (FWA) starts after the end date shown on another FW post – if yes all documents must be provided (all being: personal details form, HMRC Starter Checklist, Right to Work, Assignment Letter, and if relevant, HERA authorisation for any agreed rate of pay [hera@st-andrews.ac.uk](mailto:hera@st-andrews.ac.uk) )
- Have all documents been typed with the exception of signatures?
  - Are all documents signed or has an email from the individual been provided in lieu of this?
- Are all documents separated and in pdf format?
- Are all documents completed and ready to be emailed on one email per submission with the surname of the flexible worker in the subject (plus ID number if known)?

### Flexible Worker Assignment Letter (6 pages standard)

- Full name and address provided on FWAL.
- Existing ID provided if applicable.
- Has most recent FWAL template been used from casual staff webpage([Casual Staff](#)), and type(s) of work selected in table?
- Has correct rate of pay been added to remuneration section of assignment letter?
- If Support AUT or Academic AUT was selected on the type of worktable, the authorisation from HERA for the agreed rate **must** be attached to the email submission or added in the FWAL.
- Does the assignment duration comply with the maximum amounts per the FW guidance for students(1 year or when their studies end, whichever is shorter) or non-students(15 weeks or 17 weeks with HRBP authorisation).
- Ensure document is signed or they have provided an email from the individual where they have submitted the documents that can be used in lieu of a signature.

### Right to work (RTW 1 page as standard)

- Has the Right to Work (RTW) been checked and will remain valid for the duration of the assignment being submitted?
  - Provide verified RTW check **completed on or before the assignment start date** if required, or an updated one to extend existing RTW details if an existing RTW expires during new assignment.
- Do they have any working restrictions?
  - If on a student visa it will mention XX hours per week in term time.

- Note: If they are a post graduate student then term time is all year round, it does not follow the semester/vacation dates in the same way as an undergraduate student.
- Guidance found [here](#).

### **Personal Details form (PD 1 page)**

- Should be typed apart from any written signature.
- Legal name provided- there is a space for known as to be provided.
- Has a title been added to the form e.g. Mr, Miss, Ms, Dr,
- Have they input their Date of Birth
- Has an NI number been added- if from the UK then they should have one
- Have they added a local address e.g. somewhere within commuting distance if working in the university buildings
- Have the bank details been added correctly
  - 6 numbers for sort code
  - 8 numbers for account number (not 16 digit card number)
- Ensure document is signed or they have provided an email from the individual where they have submitted the documents that can be used in lieu of a signature.

### **HMRC Starter checklist (3 pages on current version)**

- Use the link on the Flexible worker webpage ([Casual Staff](#)) for the most up to date version.
- Ensure employee statement is completed with only 1 selection made either A, B or C, not multiples.
  - The answers to the questions given should direct the individual.
- Ensure Flow of Student loan section is completed correctly i.e. if the answer to a question says to go to the declaration, check the person has not then moved to the next question.
- Ensure document is signed or they have provided an email from the individual where they have submitted the documents that can be used in lieu of a signature.