



PTA assignment spreadsheet guidance

General Information

Postgraduate students that undertake regular and pre-scheduled teaching work are employed by the University on a fixed term contract as a Postgraduate Teaching Associate (PTA).

Information about the contracting and pay arrangements for PTAs can be found here: <https://www.exeter.ac.uk/working/prospective/ptas/>

The following guidance summarises the key steps taken to record and share information about PTAs and the allocation of their work.

Step 1: Updating the PTA Assignment spreadsheet

1. The PTA Assignment spreadsheet replaced the HAT form in Aug 2020 as the method of recording the hours allocated to a student for teaching, assessment, preparation and training.
2. The spreadsheet should be completed by the PTA Co-ordinator or person responsible for supporting PTA work.
3. The spreadsheet can be used to provide brand new information, to allocate additional hours to a PTA who has already been contracted, or to amend or cancel previously submitted information.
4. The spreadsheet automatically calculates the total hours allocated. It also calculates the total salary cost (including holiday) based on the rate of pay that is provided. Colleges will be provided with a list of current PTAs rates of pay. All new PTAs will start on Grade E, F23 by default.
5. The spreadsheet can be used to record information about multiple PTAs – so information can be submitted in bulk rather than individual forms for each PTA.
6. A separate row should be completed for each module a PTA is employed to work on.
7. Once the information for a PTA is fully confirmed the 'Information confirmed' column on the spreadsheet should be completed. This authorises the college administration team to review the data and share information with the student and with the HR and Finance teams. No action will be taken until this column is complete.
8. General formatting: Please don't alter any formatting already set up on the spreadsheet. Please enter dates in the Day/Month/Year format. Please don't sort the spreadsheet (this makes finding new entries difficult).
9. Guidance notes are also attached to the spreadsheet.

Step 2: Sharing the PTA Assignment spreadsheet

1. Information recorded on the spreadsheet is shared with the relevant college administration team, details below
 - CEMPS: James Smith
 - CLES: Susan McGowan





- CMH: Becky Critoph
 - HUMS: Kristen Brind
 - SSIS: Rebecca Barr
 - UEBS: Tom Crowford
2. The college administration team will review the data, and take appropriate action if any information is missing, or if there are any queries.
 3. The college administration team will share information with the Director of College Operations and the college Finance team for budget monitoring and approval, and also with the Human Resources team who will conduct the pre-employment checks and issue the employment contract.
 4. The college administration team will issue a PTA Assignment schedule to the student. This confirms information about their allocated hours, and information about their contract. One assignment schedule will be issued per module. Any amendments to the original allocation will be confirmed by email.

Step 3: Changing or cancelling information

1. The college administrator should be made aware as soon as possible if information needs to be changed or cancelled, and they will work with HR to ensure the appropriate action is taken.
2. The amended information should be recorded on the spreadsheet.

Step 4: Allocating additional hours

1. The spreadsheet can be used to allocate additional hours to a PTA who has already received their contract.
2. Where the additional hours are for a new module a new PTA Assignment Schedule will be issued to the student, but their employment contract will not need to be changed as this already allows for additional hours to be allocated and worked.

Amendments to modules that a PTA is already contracted to work on will be confirmed to the PTA by email (not on a new assignment schedule).





Key process steps

Key steps in PTA Assignment Spreadsheet Process

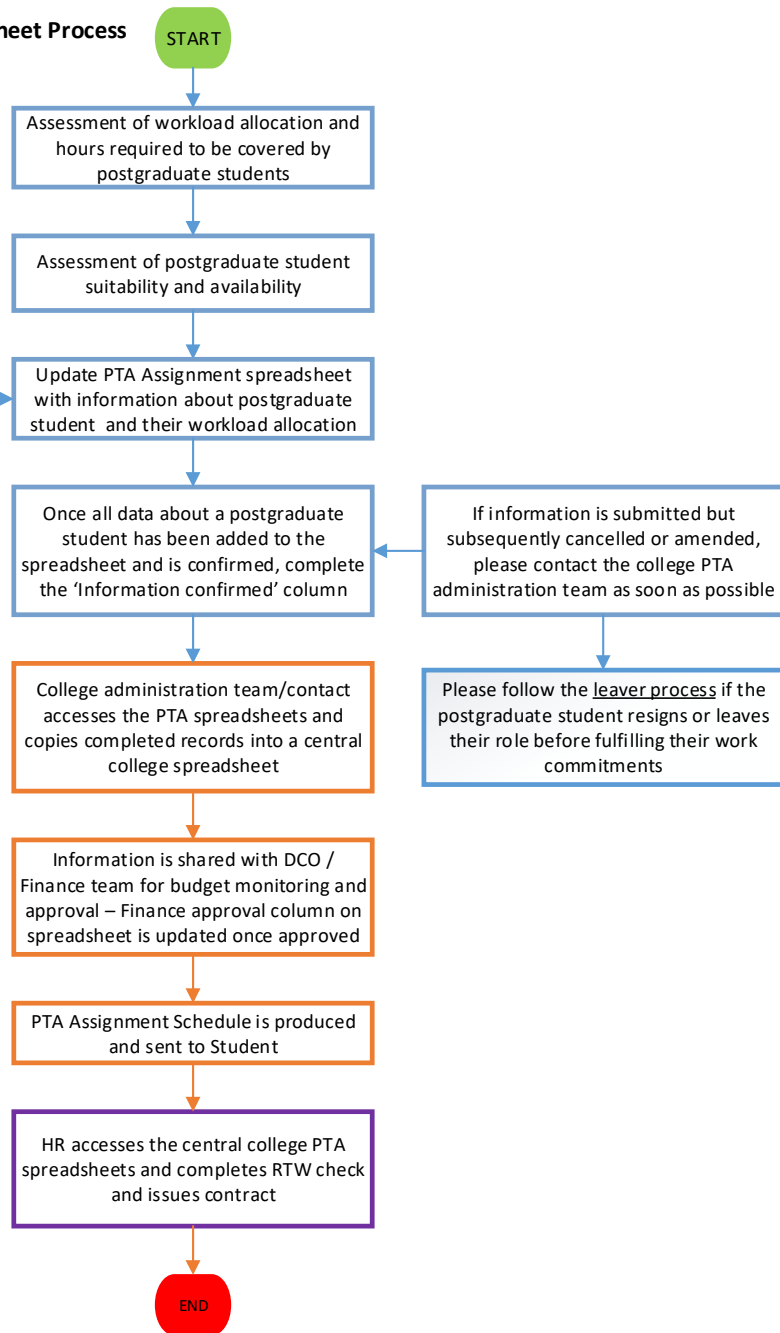
KEY:

Steps taken by PTA Coordinators/ DoE

Steps taken by central college administration team / contact

Steps taken by Human Resources

The spreadsheet can be used to record new hours, additional hours, or to record amendments or cancellation of previously submitted information



Human Resources (Date of this version: 24/08/2020)

