People and Money system

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New Hire Guide- How To Complete Onboarding Tasks
New Hire
Estimated time to complete: 4 minutes

The onboarding tasks assigned to new hires are designed to meet the legal requirements of setting any new employees of the university up on our HR System.

The Your contract is ready to sign task may appear greyed out or locked when you first gain access to People and Money. You will be notified via email and an in-system notification when this is available to be signed and uploaded.

For HESA reporting requirements the information captured is a best endeavours exercise. Where your previous academic institution is not an option in the list provided please use the option for Higher Education Institution (HEI) not listed/not known.

If you experience any issues in completing any onboarding tasks please email HR helpline on the email address provided above in the first instance.

In Brief…

This is a simple overview of the process.

Completing Onboarding Tasks

1. Click the Me link and select the Onboarding App.

2. Scroll to the Tasks to Finish section in the lower part of page.

3. Click on the tile of a task that you would like to carry out.

4. If the button is available, click Go to Task.

5. Complete the fields in the task.
6. If it is necessary to update the information, click the Pencil icon, make the desired changes and click Submit button.

7. When the task is finished click the Complete button.

For detailed guidance see the next section.

In Detail…

Completing Onboarding Tasks

1. From the Home page, click the Me link and select the Onboarding App.

2. The Onboarding welcome page is displayed and explains there are 7 tasks for you to complete as part of the joining process.
3. Scroll to the lower part of the page and review the Tasks to Finish tiles.

Each task has a due date and can be completed in any order you desire. Some tasks require you to review the details only, and others require you to input information or upload documentation. A task tile is removed from the list when you mark it as complete.

4. Click on the tile of a task that you would carry out and review the supporting information. In the example, the personal information task is used.
5. If the task does not apply, or if you would like to create a reminder to carry out the task later, click **Actions** and choose the appropriate option.

6. To open the task, click the **Go to Task** button and review the supporting information and go to the next step.

If there is not a **Go to Task** button complete the applicable fields and jump to step 11 to continue.
7. Check the information displayed on the page to verify the details are correct.

8. If you are satisfied with the details, move to step 10 to continue.

   To update the information, click the Pencil icon.

9. Make the required changes and click the Submit button.
10. The submission is forwarded to HR Operations to review and authorise.

Click the < button in the black banner to the left of your initials to return to the Onboarding page.

11. When a task is finished click the **Complete** button. However, if you have finished a task and it remains on the Onboarding page, the “Personal Details” task for example, select the tile to reopen it, and then click the Complete button.
12. When a task is marked as “Complete”, in the Onboarding page the number of tasks completed is updated.

13. To complete the remaining tasks, follow steps 4 to 11 above.