



System User Guide

School/Department Administrator (SDA)- Guide to Housekeeping Legacy Checklists and Tasks

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Introduction

With the move to Journeys, all open and overdue checklists and tasks have automatically transferred over, providing improved visibility and access to initiated journeys and tasks. As a result, you may find a number of legacy checklists that were not previously concluded. To assist you in locating old checklists, refer to the [Appendix 1](#) for a list. Follow the steps below to complete your review and take the necessary actions.

For guidance on how to manage Journeys within People and Money please see the [SDA Guide to Journeys](#).

On 04 April 2025 a bulk exercise was carried out to clean up legacy checklists and tasks older than 15 months. Whilst this exercise cleaned up a significant number of legacy checklists and tasks, any checklists assigned from 05 January 2024 have remained and you can use this guidance to support you if you wish to conduct some manual housekeeping. Any further bulk clean up exercises will be communicated in advance via the [People and Money Updates](#) channel.

Journeys assigned from 24 March 2025 have been configured with a scheduled 'Archive and Purge' process that will force close and delete checklists within a set timeframe (15 months) aligning with the HR Retention Schedule.

In Brief

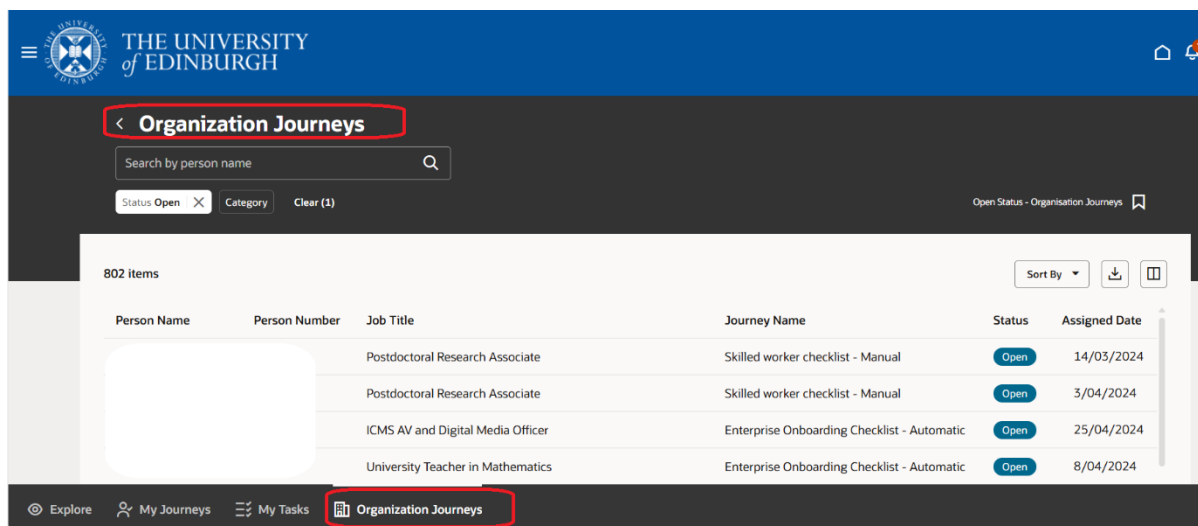
This section is a simple overview and should be used as a reminder. More detailed information on each outcome is provided later in this guide.

1. From the People and Money homepage select **My Client Groups**, then **Journeys**. The default landing screen will be **Organization Journeys**
2. Using the Search functionality on the left of the screen, filter on Open and sort by Person Name
3. **To take action**, click on the name of the person to open the details, here you will see how many days each task is overdue by. Navigate to **Actions** and select **Force Complete**. This will complete the Journey and all of the tasks within.

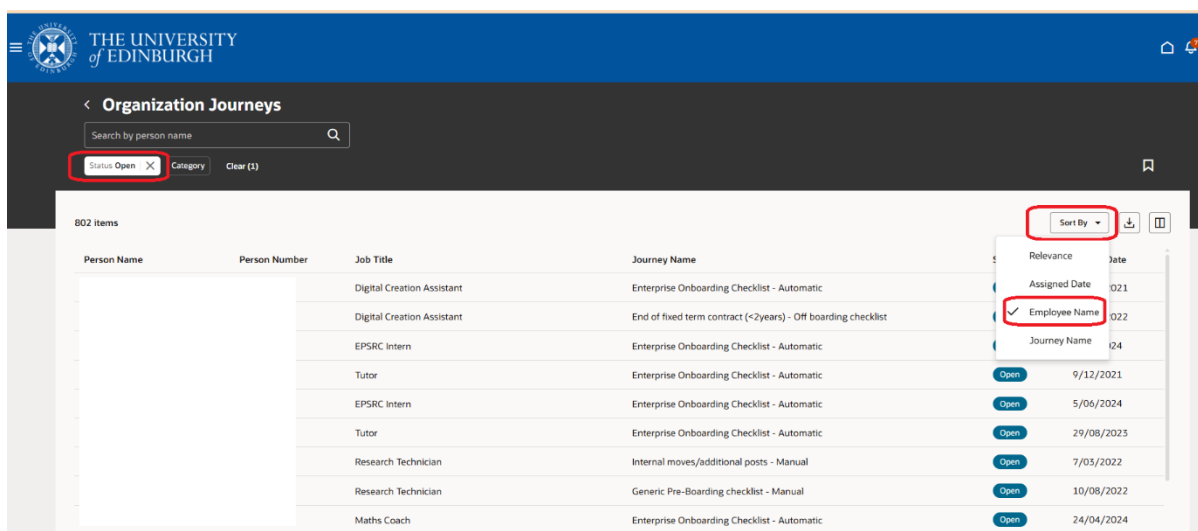
In Detail

This section provides the detailed steps and includes relevant screenshots from the system.

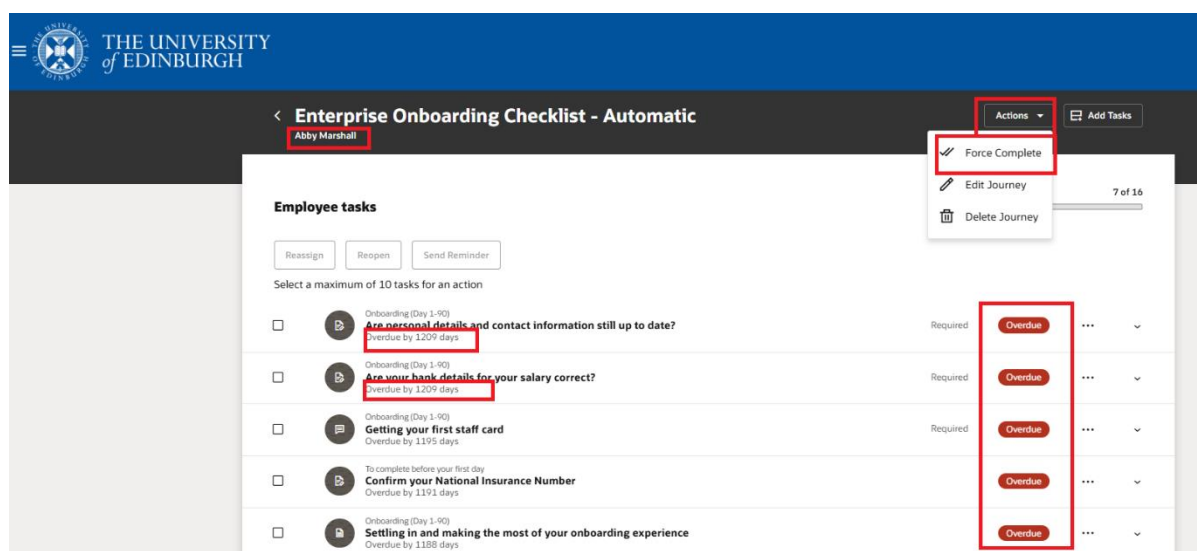
1. From the People and Money homepage select **My Client Groups**, then **Journeys**. The default landing screen will be **Organization Journeys**.



- Using the Search functionality on the left of the screen, filter on Open (this will also include overdue) and sort by Person Name (this will group all Journeys for each person within your Area of Responsibility). Use the dates displayed to guide you, any Journeys assigned before 01 January 2024 can be closed off.



- To take action**, click on the name of the person to open the details, here you will see how many days each task is overdue by. Navigate to **Actions** and select **Force Complete**. This will complete the Journey and all of the tasks within.



Tips

- Where possible, notifications have been switched off for this action, however employees may receive a small number of notifications which will tell them that the checklist has been force completed. See [Appendix 2](#) for an example.
- You cannot Force Complete a Journey that was assigned after launch, in this scenario you will be presented with the option to **Delete Journey** at the top of the page.
- You should not remove/delete individual tasks as this will send notifications for each individual task.

Appendix 1

Legacy Onboarding Checklists

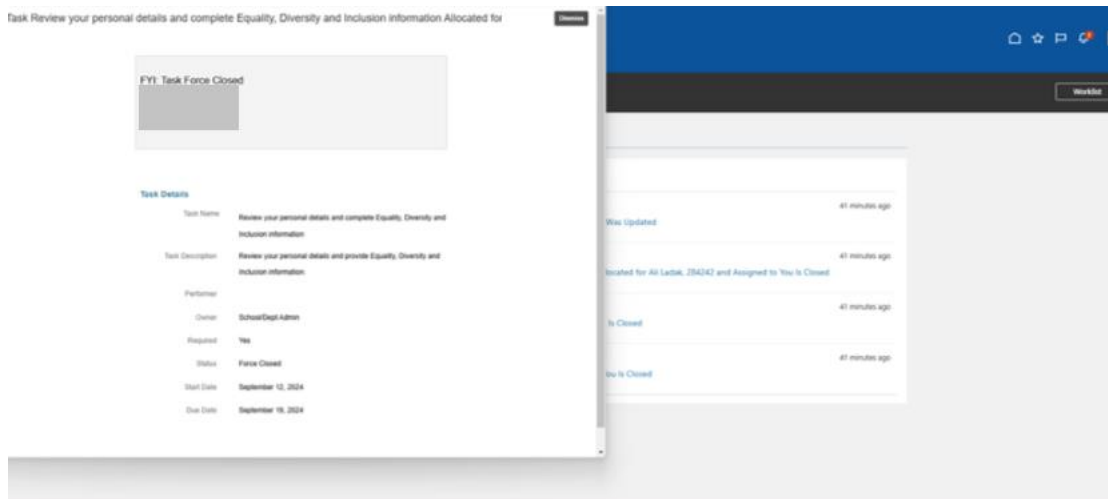
Checklist Name	Description
Enterprise Onboarding Checklist (This includes the Generic Preboarding checklist and the Day 1-90 Onboarding Checklist)	The generic preboarding checklist is automatically provisioned for new hires once they become a 'pending worker' in P&M. The Day 1-90 checklist is automatically provisioned from the new hires start date.
NHS Honorary Cover	Checklist to be manually assigned for roles that require NHS honorary cover. SDA/ Hiring manager should manually assign this checklist.
Skilled Worker Checklist	Checklist for new hires requiring sponsorship. Once person is a pending worker in P&M, the SDA/ Hiring manager should manually assign this checklist which will guide you through the tasks in the process for obtaining sponsorship. The Guidance - Use of the Skilled Worker Checklist (under the Recruitment and Onboarding heading, Offer and Hire section) provides further information.

Health Job Hazard Checklist	Checklist for roles that required a health risk assessment including, but not limited to Animal workers, Laboratory Managers/Technicians/workers, Night workers, Workshop staff, Principal Investigators/Research Group Leaders, Cleaners, Maintenance staff and Swimming pool maintenance staff. Local risk assessments must be used to identify any other applicable jobs. SDA/ Hiring manager should manually assign this checklist.
Internal Moves/Additional Posts	Checklist for internal transfers or those taking on an additional post, this can include Internal Secondments. SDA/ Hiring manager should manually assign this checklist and liaise with the primary assignment line manager to have the checklist reassigned.
Arcadia Checklist	Checklist for Arcadia staff only. Automatically provisioned.

Legacy Offboarding (Leaver) Checklists

End Assignment (Resignation)	Abandon Contract
End Assignment (Not Resignation)	TUPE Out
Resignation	Mutually Agreed Termination
Resignation (Standard Retirement)	Voluntary Severance
Employment Terminated due to Immigration Restrictions	Dismissal
Redundancy	Resignation (Ill Health Retirement)
End of Fixed Term contract (<2 years)	Death in Service
Transfer to Non-Advertised Post	

Appendix 2



Version History

Version	Date	Description	Approved By
0.1	N/A	Draft	
1.0	24/03/2025	First version for publication	ME
2.0	19/5/25	Updated to reflect additional information about the April 25 clean up exercise.	ME/SK

Reviewers & Approvers

Further details of the Reviewers and Approvers of this document can be found by contacting HR Process Improvement. Please raise a Service Request using the category Continuous Improvement.