



## System User Guide

# School/Department Administrator (SDA) - Guide to Journeys

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## Introduction

This guide covers key tasks for School/Department Administrators (SDAs) to support the starters, mover (transfer) and leaver processes. It is related to the Process User Guide for Recruitment and Onboarding and the Guide to Employment Separation which is linked below.

[Guide to Recruitment and Onboarding](#)

[Guide to Employment Separation](#)

A Journey is a collection of tasks that supports the joiner, transfer and leaver processes within the University. Journeys have replaced Onboarding and Leaver Checklists and Tasks (from 24 March 2025). SDAs can access tasks for employees within their area of responsibility (AOR).

Most Journeys are automatically assigned, based on certain employment actions in People and Money e.g. Add Pending Worker triggers the Welcome to the University Journey. The following Journey must be assigned manually:

- **Skilled Worker – Certificate of Sponsorship** – A journey to support the process for applying for a Skilled Worker Visa for new out of country skilled workers. Further information is available within the [A Guide to Sponsorship of Skilled Workers and Temporary Worker Sponsored Researchers](#)

You will be notified of tasks assigned to you by email and via the notification bell, whilst you can take action directly from there it is **preferred** that you review and complete tasks from Organization Journeys or My Tasks. If you are an SDA with Line Manager responsibility you can also take action for your team within Team Journeys.

There are some individual tasks that should be assigned manually for staff who will be working in roles where a Health Risk Assessment or NHS Honorary cover is required. See the section [below](#) for further details and responsibilities.

If throughout the onboarding or leaver Journey, the line manager of the employee changes or leaves the university, the Journey and its tasks will remain with them. The tasks can be reassigned to the new line manager following the steps [below](#).

If any action to hire, transfer, end assignment or terminate an employee is **backdated** then the Journey will always go to the current primary assignment line manager and SDA. In the instance where the termination is backdated the employee will not receive any tasks to complete.

## Navigation within Journeys

Navigation within Journeys depends on the role you have within People and Money; this guide is written for SDAs. The table below outlines the access by user.

	Journey Navigation					
Role	Explore	My Journeys	My Tasks	Team Journeys	Organization Journeys	Activity
<b>Pending workers and workers</b>	No	Yes	Yes	No	No	No
<b>School/Dept Admin</b>	Yes	Only if allocated a journey as a Pending Worker or Employee	Yes	No	Yes, but is restricted to AOR	No
<b>HR role (except HR Systems)</b>	Yes		Yes	No	Yes - All journeys	No
<b>Line Managers</b>	Yes		Yes	Yes	No	No
<b>HR Systems</b>	Yes		Yes	No	Yes - All journeys	Yes

There are ten Journeys available within People and Money. It should be noted that existing Journeys (checklists assigned prior to this date) will transition into Journeys and remain with existing tasks as users work through and complete those in progress. A list of these is available within [Appendix 1](#)

Journeys assigned from the 24 March 2025 will be purged and deleted after 15 months from their start date as per the [HR Retention Schedule](#). This won't apply to legacy checklists and tasks, manual housekeeping will be required.

## List of Journeys

A more detailed description of each task with the Journey is available in [Appendix 3](#)

Journey Name	Description
<b>Onboarding Journeys</b>	
Welcome to the University of Edinburgh	For new hires once they become a 'pending worker' in People and Money. The Journey includes preboarding (before day 1) and onboarding tasks (day 1-90).
Rejoining the University of Edinburgh	For anyone re-joining the University, the Journey becomes active once the rehire has taken place. The Journey includes preboarding (before day 1) and onboarding tasks (day 1-90).
Getting Started in a new role	For internal transfers, additional posts and internal secondments moving to a new role.
Skilled Worker Certificate of Sponsorship	A Journey to support the process for applying for a Skilled Worker Visa for new out- of -country skilled workers.
Welcome to Arcadia Nursery	For new hires joining Arcadia Nursery only.
Probation Review Approaching	Journey for new hires and rehires only, will be assigned based on grade and contract type 5 months from start date (for 6-month probation) and 11 months from start date (for 12-month probation).
<b>Offboarding Journeys</b>	
Leaving the University of Edinburgh	A Journey to support the process of leaving the University, for employee, line manager and SDAs.
Leaving the University for an involuntary reason	A Journey to support the process of leaving the University, for line manager and SDAs.
End of Assignment but continuing at the University	A Journey to support staff leaving one of their assignments but continuing employment with the University.
Moving Roles – Tasks to complete in your current role	For internal transfers, additional posts and internal secondments and details tasks to complete in their current role.

## Task Owners, Initiators and Performers

A **task owner** plays the following roles:

1. Receives notifications for task events (assignment, updates, completion, reassignment, or deletion) if notification settings are enabled.
2. Acts as a fallback task performer if the assigned performer is unavailable or invalid (e.g., line manager or AOR unavailable).

An **initiator** is the person who triggered the journey either automatically or manually. When a task is assigned, the application determines its performer in the following order:

1. **Task Performer:** If the specified performer (e.g., Line Manager) is unavailable, then:
2. **Task Owner:** The application checks the task owner's setup (e.g., AOR). If the task owner is also unavailable, then:
3. **Task Initiator:** The task is assigned to the initiator who performed the transaction.

For example, if a journey task's performer is the Line Manager and they are unavailable, the application checks the task owner setup (e.g., AOR). If neither is available, the task goes to the initiator.

When a task is completed the 'Completed by' information only shows on the 'Others' Tasks section within Team Journeys, it will not show against completed tasks in My tasks or Employee tasks sections.

## Actions – what you can and cannot do at a Journey or task level

The table below outlines who can perform what action at a Journey or task level.

	<b>Pending Worker/ Employee</b>	<b>HR Services</b>	<b>SDA</b>	<b>Line Manager</b>
Access <b>all</b> tasks in a Journey	N	Y – except bank details and HMRC tasks	Y - except bank details and HMRC tasks	Y - except bank details and HMRC tasks
Reassign Tasks	N	Y	Y	Y
Send Reminders	N	Y	Y	Y
Reopen Tasks	N	Y	Y	Y
Delete a Journey	N	Y	Y	N
Delete a Task	N	Y (limited)	N	N
Add a Task from the Library	N	Y	Y	Y
Edit a Due Date (Sponsored Worker Tasks Only)	N	Y	Y	Y

## Notifications

When a journey is assigned, all participants will receive a combined summary notification which shows the tasks they need to complete and an FYI of the tasks that others need to complete. Below is an example of the summary notification.

Checklist Task Summary on November 22, 2024 for Welcome to the University of Edinburgh for Pwfour Welcome-Journey(286660) - School - Microsoft Edge

https://elov-test-fa.em3.oraclecloud.com/frcm3/faces/adf/task-flow?\_afpmWorklistTaskId=75449ad9-6ef4-4e19-b338-fbec5ab09158&\_afpmWorklistContext=977ef667-5cce-4ba4-bad0-eab5e22be4ef&38%3B0%3B380%3B2f3d5e5g2O6AHM11F2C98gpYhCHYDq%2...

Checklist Task Summary on November 22, 2024 for Welcome to the University of Edinburgh for Pwfour Welcome-Journey(286660)

Checklist Tasks for Pwfour Welcome-Journey(286660) on November 22, 2024

Action Required

	Task Name	Due Date	Required	Details
1	Upload proof of right to work (RTW)	December 13, 2024	Yes	<a href="#">More details</a>
2	Confirm whether the role will be based outside the UK	December 13, 2024	Yes	<a href="#">More details</a>
3	Request contract	January 3, 2025	Yes	<a href="#">More details</a>

FYI

	Task Name	Performer	Status	Due Date
1	Complete Statutory reporting questions for (HESA and REF)	EMTESTKate EMTESTKatie , 119923	Complete d	December 22, 2024

Notifications of assigned tasks and reminders will be via the notification bell and via email. An email will provide a link to the relevant task. It is recommended to take action on tasks within People and Money instead of the email.

If some chooses to send a reminder it sends a 'non actionable' FYI notification to the performer of that task.

## In Brief

This section is a **simple overview** of how to navigate and take action within Journeys and should be used as a reminder. More detailed information, screen shots and tips s provided within the In Detail section.

## Navigating Journeys

1. From the People and Money homepage select **My Client Groups**, then **Journeys**
  - **Explore** – This is the Journey library where you can view all Journeys available in People and Money and assign these to members of your team.
  - **My Journeys** – This is where you can see Journeys **assigned to you** as a pending worker or employee.
  - **My Tasks** – This is where you can see the tasks **you need to complete** in a list view as well as others' tasks within your Area of Responsibility (AOR).
  - **Organization Journeys** – This is where you can see Journeys assigned to all staff within your AOR, **this is the most useful and default view for an SDA.**

## Organization Journeys

1. From the People and Money homepage select **My Client Groups**, then **Journeys**. The default landing screen will be **Organization Journeys**. This screen will show the list of employees within your AOR.
2. Use the filters at the top of the page to search or to sort the order that the Journeys are displayed.
3. Click on the name of the person you wish to view in more detail. The screen will be in three sections which clearly shows the status of the tasks, My tasks, Employee tasks and Others' tasks
4. Click on the task name to expand the details and to complete the task.

## My Tasks

1. From the People and Money homepage select **My Client Groups**, then **Journeys**. The default landing screen will be **Organization Journeys**. Navigate to My Tasks, this screen will show the list tasks you need to complete within your AOR.
2. Use the filters at the top of the page to search or to sort the order that the Journeys are displayed.
3. Click on the name of the task you wish to view in more detail and to take action.

## Reviewing and Completing Tasks

1. You will be notified of tasks assigned to you and reminded by email and the notification bell, however you can closely monitor and take action to complete tasks from Organization Journeys or My Tasks.
2. Follow the steps within the task, note that some tasks will take you to screens away from People and Money. **You should navigate back to the Task to complete if required.**

## Housekeeping of old checklists and tasks

1. Please follow the steps in the [SDA Guide to Housekeeping Legacy Checklists and Tasks](#) to complete this.

## Reassigning, Reopening, Edit Due Date and Sending Reminders for Tasks

1. From the People and Money homepage select **My Client Groups**, then **Journeys**. The default landing screen will be **Organization Journeys**
2. Search for or click on the person you wish to review and then select the task you wish to take action for from **My tasks**, **Employee tasks** or **Others' tasks**
3. Click on the ellipsis at the right-hand side of the task to expand the actions you can take, the action available will depend on the task and its status.

## Assigning a Journey manually

1. In People and Money, go to **My Client Group**, then **Journeys** and navigate to **Explore** and search for the Journey



2. Click on the Journey Name to review the details and select **Assign**, only the Skilled Worker – Certificate of Sponsorship Journey should need to be manually assigned.
3. Complete when to assign date, and take care when selecting the person you wish to assign the Journey to.
4. Check the details then click **Assign**, then navigate to Organization Journeys to check the assignment has been successful.

## Assigning Individual Task(s) manually

There are currently four available tasks to assign manually for roles that require a **Health Risk Assessment or NHS Honorary Cover**.

1. From the People and Money homepage select **My Client Groups**, then **Journeys**. The default landing screen will be **Organization Journeys**.
2. Search for the person you wish to assign the task(s) to, you should select the Journey most relevant to the tasks, this will likely be the Welcome to the University, Rejoining the University or Getting started in a new role.
3. Select the person, then Add Tasks
4. Complete the following fields:
  - **Name** – when you click on this field the tasks available to assign are listed
  - **Performer** –this will be the person you have selected as above step
  - **Phase** – if applicable, select if this is before day 1 or after day 1 task
  - **Assign date** – the date you want the task to start
  - To add more tasks click **Add Another**
5. Once you have added what you need click **Add to Journey**.

## Completing the Request Contract Task

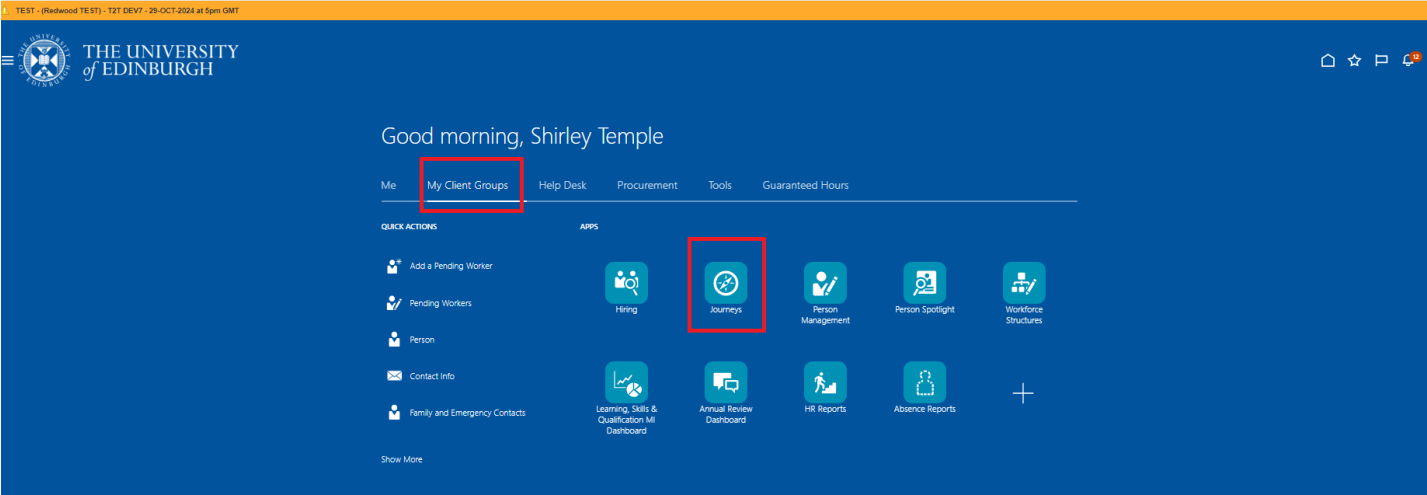
1. From the People and Money homepage select **My Client Groups**, then **Journeys**. The default landing screen will be **Organization Journeys**.
2. Click on the person you wish to view in more detail and find the Request Contract task.
3. Click on the **name of the task** to expand the task description and then complete all of the required fields.
4. Once you have entered the required information **scroll to the bottom of the screen and drag and drop any attachments (if required), then select Submit request for contract**.

# In Detail

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

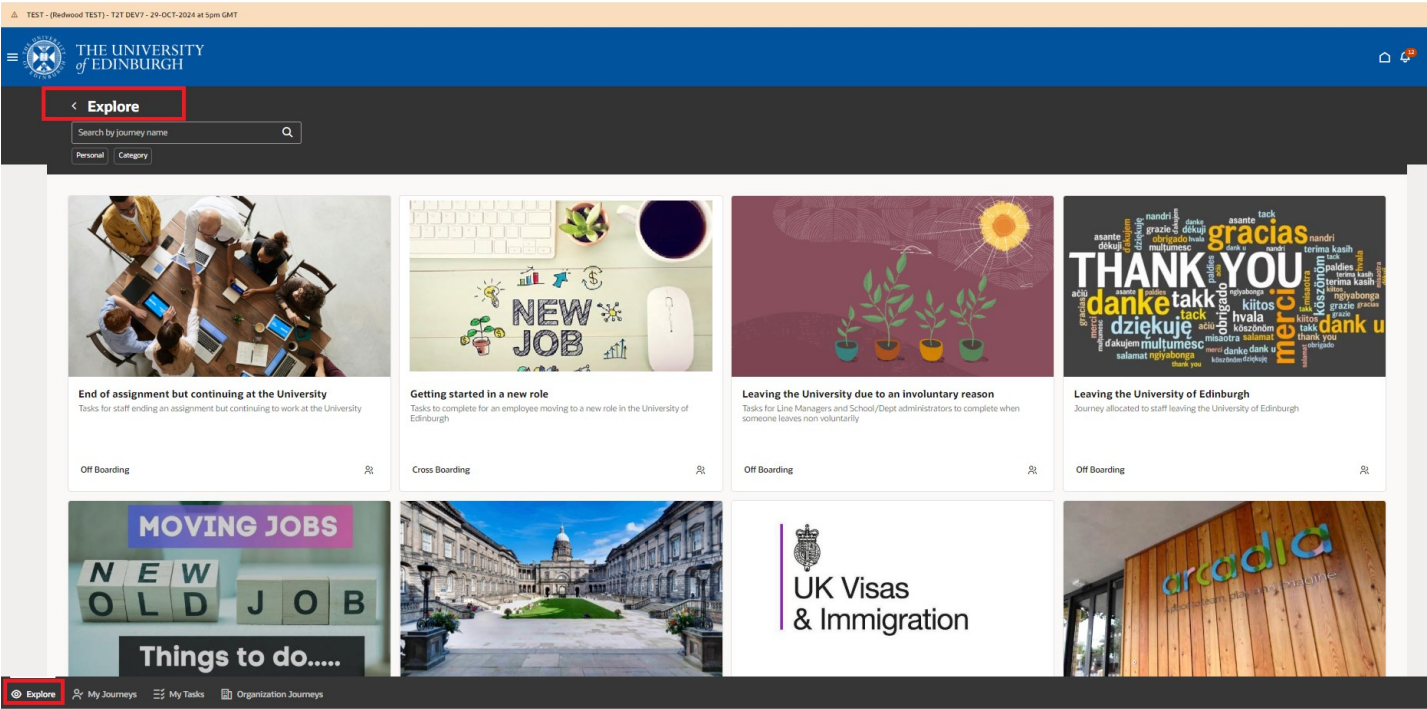
## Navigating Journeys

- 1. From the People and Money homepage select **My Client Groups**, then **Journeys**

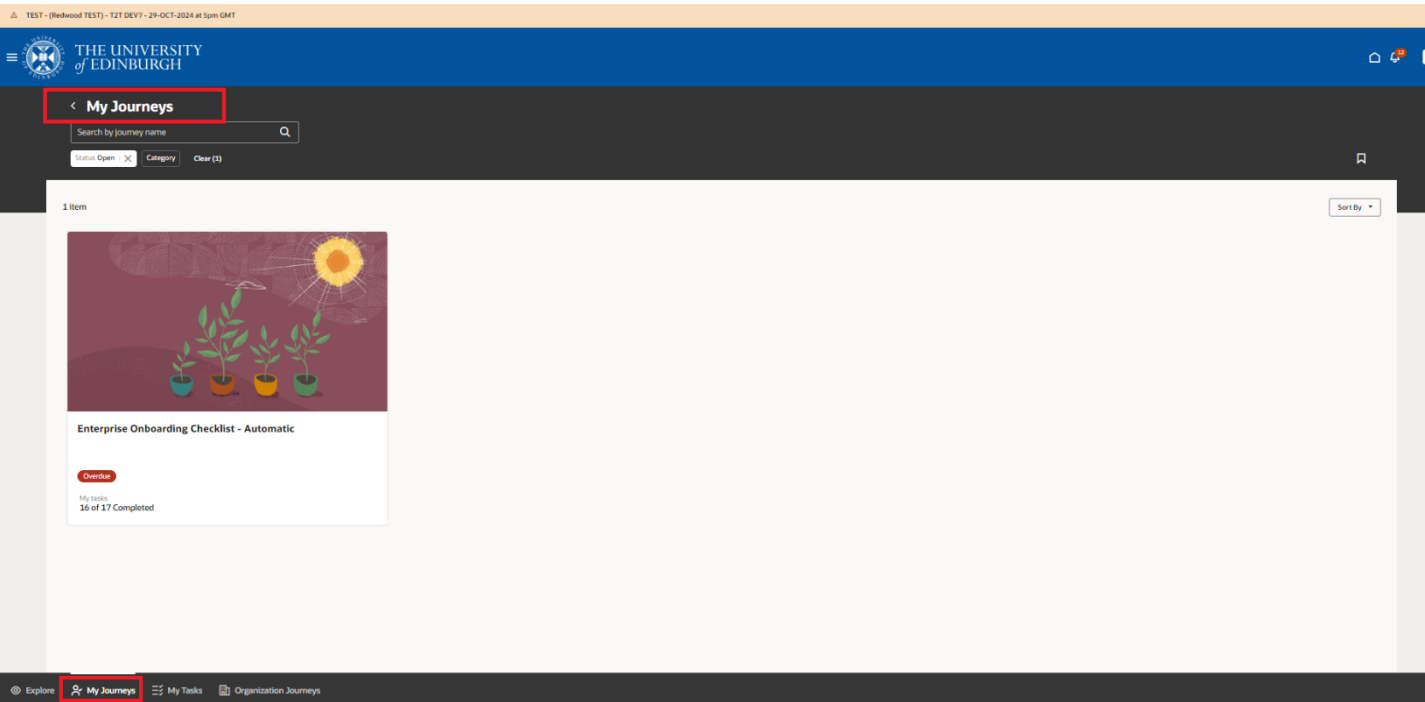


Navigation within Journeys depends on the role you have within People and Money. As an **SDA** you will have access to:

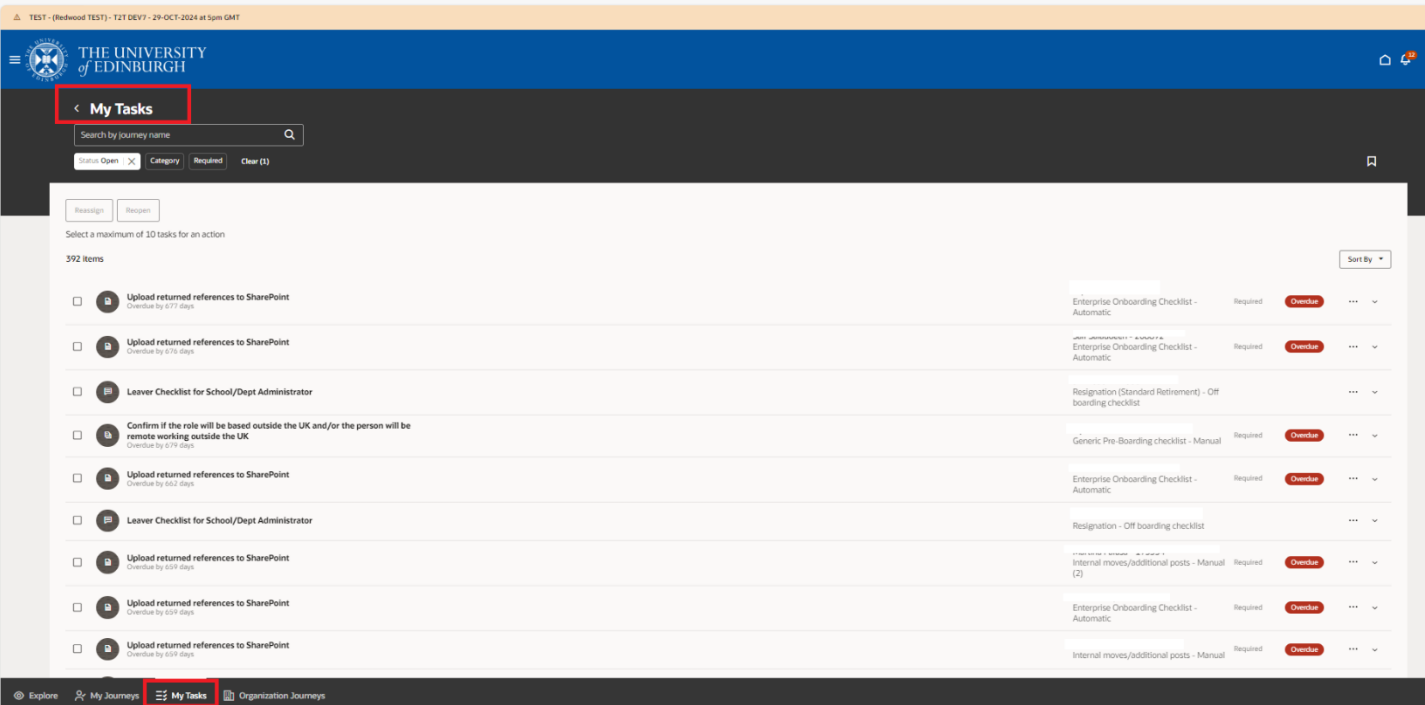
- **Explore** – This is the Journey library where you can view all Journeys available in People and Money and assign these to members of your team.



- My Journeys** – This is where you can see Journeys **assigned to you** as a pending worker or employee.



- My Tasks** – This is where you can see the tasks **you need to complete** in a list view as well as others' tasks within your Area of Responsibility (AOR).



- **Organization Journeys** – This is where you can see Journeys assigned to all staff within your AOR, **this is the most useful and default view for an SDA.**

TEST - (Redwood TEST) - T2T DEV1 - 29-OCT-2024 at 5pm GMT

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< Organization Journeys

Search by person name

Status Open X Category Clear (1)

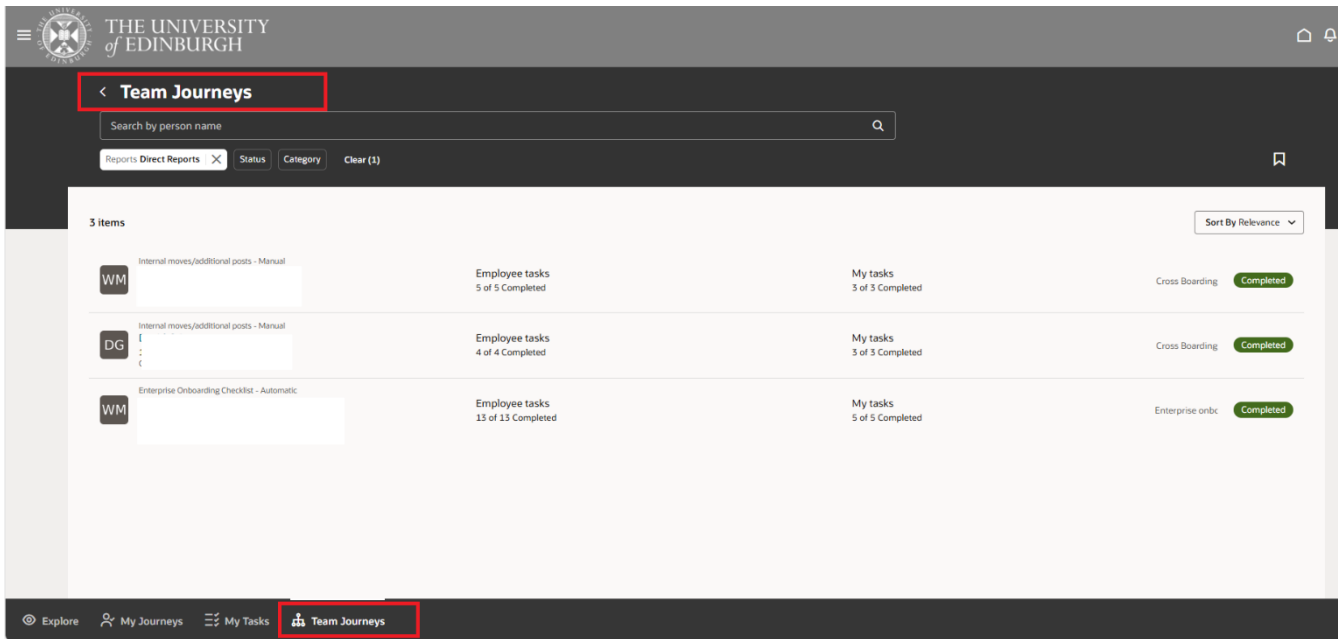
775 items

Sort By

Person Name	Person Number	Job Title	Journey Name	Status	Assigned Date
		Research Associate	Enterprise Onboarding Checklist - Automatic	Open	1/04/2021
		Research Associate (C1) (ACAD - Researcher)	Employment terminated due to immigration restrictions - Off boarding checklist	Open	6/04/2021
		Postdoctoral Research Associate	Enterprise Onboarding Checklist - Automatic	Open	19/05/2021
		Research Assistant	Internal moves/additional posts - Manual	Open	30/03/2021
		University Teacher in Mathematical Sciences	Redundancy - Off boarding checklist	Open	5/08/2021
		Tutor	Resignation - Off boarding checklist	Open	5/08/2021
		Tutor	Enterprise Onboarding Checklist - Automatic	Open	6/08/2021
		Tutor	Abandon contract - Off boarding checklist	Open	12/08/2021
		Tutor	Enterprise Onboarding Checklist - Automatic	Open	6/08/2021
		Tutor	Enterprise Onboarding Checklist - Automatic	Open	12/08/2021
		Tutor	Enterprise Onboarding Checklist - Automatic	Open	6/08/2021
		Tutor	Enterprise Onboarding Checklist - Automatic	Open	6/08/2021
		Tutor	Enterprise Onboarding Checklist - Automatic	Open	6/08/2021
		Tutor	Enterprise Onboarding Checklist - Automatic	Open	6/08/2021
		Tutor	Enterprise Onboarding Checklist - Automatic	Open	6/08/2021
		IT Intern	End of fixed term contract (<2years) - Off boarding checklist	Open	7/08/2021
		Tutor	Resignation - Off boarding checklist	Open	29/07/2021

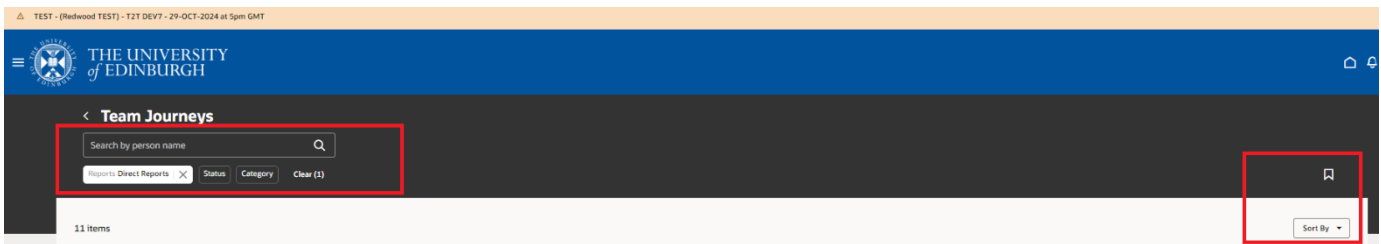
Explore My Journeys My Tasks Organization Journeys

- **Team Journeys** – If you are an SDA with Line Manager responsibilities you will also see Team Journeys. This is where you can see Journeys assigned to your team by individual, this is the most useful and default view for a Line Manager. If wish to review Journeys as your role as a Line Manager, please follow the [Guide to Journeys for Line Managers](#).
- When a worker is terminated, the line manager's relationship with that worker is end-dated, as of the termination date. Therefore, post the termination date, you cannot view the terminated workers journey in the Team Journeys tab. You will however still be able to see and complete allocated tasks for that worker in the My Tasks tab.



## Tips

- Navigation to the different areas is at the bottom left of the screen.
- You can use the **Search** and **Sort by** Functions on each of these pages to refine your search and display settings, these can also be bookmarked for future use.



## Organization Journeys

1. From the People and Money homepage select **My Client Groups**, then **Journeys**. The default landing screen will be **Organization Journeys**. This screen will show the list of employees within your AOR.

**Organization Journeys**

Search by person name

Status Open X Category Clear (1)

Open Status - Organisation Journeys

814 items

Sort By

Person Name	Person Number	Job Title	Journey Name	Status	Assigned Date
		Tutor	End of assignment but continuing at the University	Open	14/02/2025
		Communications & Web Officer	Moving roles: Tasks to complete in your current role	Open	12/02/2025
		Communications & Web Officer	Getting started in a new role	Open	12/02/2025
		Tutor in Japanese	Moving roles: Tasks to complete in your current role	Open	7/02/2025
		Tutor in Japanese	Getting started in a new role	Open	7/02/2025
		New Job Title for Transfer	Moving roles: Tasks to complete in your current role	Open	7/02/2025

Explore My Journeys My Tasks **Organization Journeys**

2. Use the filters at the top of the page to search or to sort the order that the Journeys are displayed. By default, this screen will show Open Journeys

**Organization Journeys**

Search by person name

Status Open X Category Clear (1)

Open Status - Organisation Journeys

814 items


Sort By

Person Name	Person Number	Job Title	Journey Name	Status	Assigned Date
		Tutor	End of assignment but continuing at the University	Open	14/02/2025
		Communications & Web Officer	Moving roles: Tasks to complete in your current role	Open	12/02/2025
		Communications & Web Officer	Getting started in a new role	Open	12/02/2025
		Tutor in Japanese	Moving roles: Tasks to complete in your current role	Open	7/02/2025
		Tutor in Japanese	Getting started in a new role	Open	7/02/2025
		New Job Title for Transfer	Moving roles: Tasks to complete in your current role	Open	7/02/2025
		New Job Title for Transfer	Getting started in a new role	Open	7/02/2025
		Postdoctoral Research Associate	Probation review approaching	Open	6/02/2025
		Staffing Support Officer	Moving roles: Tasks to complete in your current role	Open	4/02/2025
		Staffing Support Officer	Getting started in a new role	Open	4/02/2025
		Veterinary Insurance Administrator	Getting started in a new role	Open	31/01/2025
		New Job title for transfer	Moving roles: Tasks to complete in your current role	Open	30/01/2025

Explore My Journeys My Tasks **Organization Journeys**

3. Click on the name of the person you wish to view in more detail. The screen will be in three sections which clearly shows the status of the tasks.

**My tasks** (tasks you need to complete):



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Welcome to the University of Edinburgh

Tom Collins

Add Tasks

Delete Journey

My tasks

Tasks completed 3 of 4

Reassign

Reopen

Select a maximum of 10 tasks for an action

<input type="checkbox"/>	<div>Before Day 1</div> <div>Upload proof of right to work (RTW)</div> <div>Expired on 23/02/2025</div>	Required	...	▼
<input type="checkbox"/>	<div>Before Day 1</div> <div>Confirm whether the role will be based outside the UK</div> <div>Expired on 23/02/2025</div>	Required	...	▼
<input type="checkbox"/>	<div>Before Day 1</div> <div>Request contract</div> <div>Due in 7 days</div>	Required	...	▼
<input type="checkbox"/>	<div>Day 1-90</div> <div>Upload returned references to Employee File SharePoint</div> <div>Expired on 23/02/2025</div>	Required	...	▼

Employee tasks (tasks the worker needs to complete)

Welcome to the University of Edinburgh

Tom Collins

Add Tasks

Delete Journey

Employee tasks

Tasks completed 3 of 4

Reassign

Reopen

Send Reminder

Select a maximum of 10 tasks for an action

<input type="checkbox"/>	<div>Before Day 1</div> <div>Welcome to the University of Edinburgh</div> <div>Expired on 23/02/2025</div>		...	▼
<input type="checkbox"/>	<div>Before Day 1</div> <div>Getting Paid - Enter your bank details</div> <div>Overdue by 21 days</div>	Required	Overdue	...
<input type="checkbox"/>	<div>Before Day 1</div> <div>Input Emergency contact Information</div> <div>Expired on 23/02/2025</div>	Required		...
<input type="checkbox"/>	<div>Before Day 1</div> <div>Your contract is ready to sign</div> <div>Completed on 24/01/2025</div>	Required		...
<input type="checkbox"/>	<div>Before Day 1</div> <div>Apply for your staff card</div> <div>Expired on 23/02/2025</div>	Required		...
<input type="checkbox"/>	<div>Day 1-90</div> <div>Check your bank details for your salary are correct</div> <div>Overdue by 28 days</div>	Required	Overdue	...
<input type="checkbox"/>	<div>Before Day 1</div> <div>Upload a copy of your most recent payslip along with a signed and dated CV</div> <div>Due in 26 days</div>	Required		...

Others’ tasks (Line Manager or HR Tasks)

Others' tasks

Tasks completed3 of 8

Reassign

Reopen

Send Reminder

Select a maximum of 10 tasks for an action

<input type="checkbox"/>	<div><div>Before Day 1</div><div>Information to help you welcome your new start</div><div>Expired on 23/02/2025</div></div>		Required	...	▼	
<input type="checkbox"/>	<div><div>Before Day 1</div><div>Complete Statutory reporting questions for (HESA and REF)</div><div>Overdue by 4 days</div></div>	Assigned To Brandy Alexander	Required	Overdue	...	▼
<input type="checkbox"/>	<div><div>Before Day 1</div><div>Add work schedule &amp; salary costings then upload contract to Document Records</div><div>Completed on 24/01/2025</div></div>	Completed By Sherry Negroni	Required		...	▼
<input type="checkbox"/>	<div><div>Day 1-90</div><div>Check annual leave balance for your new staff member</div><div>Overdue by 5 days</div></div>	Assigned To Brandy Alexander	Required	Overdue	...	▼
<input type="checkbox"/>	<div><div>Before Day 1</div><div>Complete key job hazards evaluation</div><div>Due in 17 days</div></div>	Assigned To Brandy Alexander	Required		...	▼
<input type="checkbox"/>	<div><div>Day 1-90</div><div>Assign Learning to your team member</div><div>Overdue by 7 days</div></div>	Assigned To Brandy Alexander	Required	Overdue	...	▼
<input type="checkbox"/>	<div><div>Before Day 1</div><div>Confirm that health and safety measures are in place</div><div>Due in 19 days</div></div>	Assigned To Brandy Alexander	Required		...	▼
<input type="checkbox"/>	<div><div>Day 1-90</div><div>Did your new hire turn up?</div></div>		Required		...	▼

4. Click on the task name to expand the details and to complete the task.

Welcome to the University of Edinburgh

Tom Collins

Add Tasks

Delete Journey

My tasks

Tasks completed3 of 4

Reassign

Reopen

Select a maximum of 10 tasks for an action

☐

Before Day 1

Upload proof of right to work (RTW)

Expired on 23/02/2025

Required

...

^

To complete this task:

1. Save all Right to Work documentation into a single file with the naming convention "Firstname Lastname RTW". Ensure all relevant documents as noted in the Right to Work checklist are included.

2. Click the "Upload Document" link below. This will take you to Document Records

3. Click the "+Add" button selecting the "Right to work documents" category from the drop-down (Document Type)

4. Upload your saved document

5. From Date: Enter today's date.

6. Leave all other fields blank

7. Click submit and then click the back button to return to this task.

8. Once you have uploaded the Right to Work documentation mark this task complete. Not doing so may affect other onboarding tasks.

Upload Document (Opens in same browser window)

5. If you prefer you can navigate to [My Tasks](#) to view and complete tasks.

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PM3761

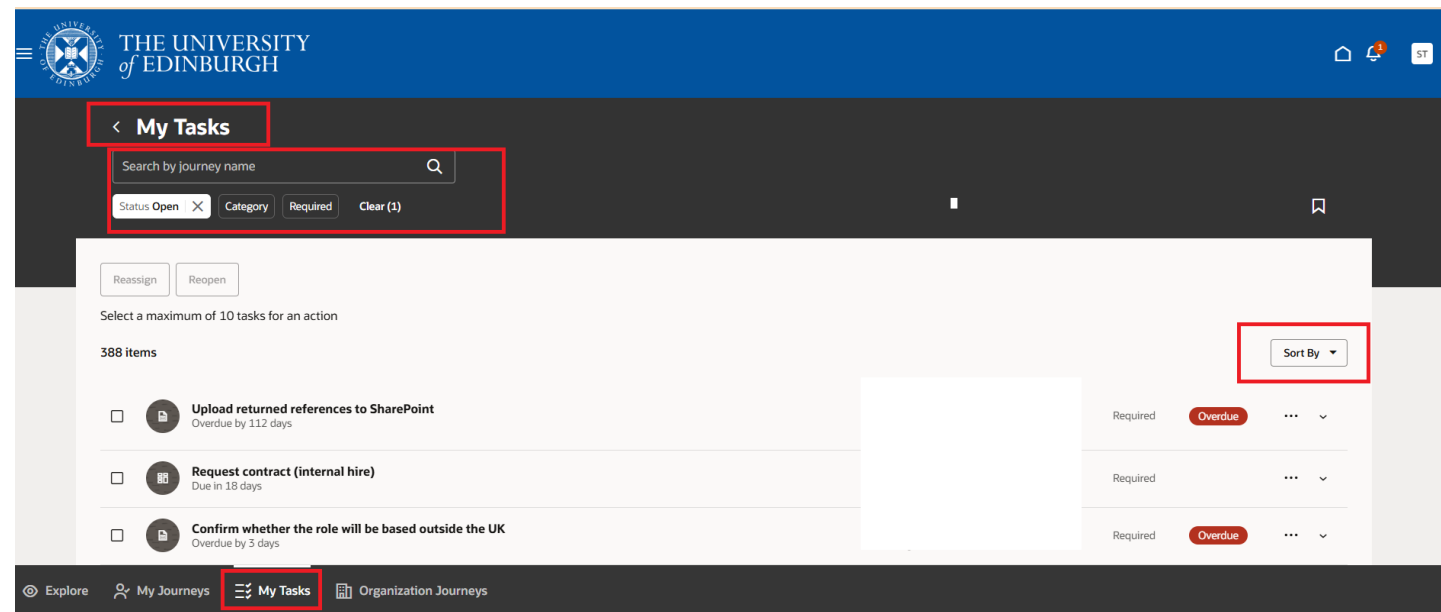
25B V2.0 May 2025



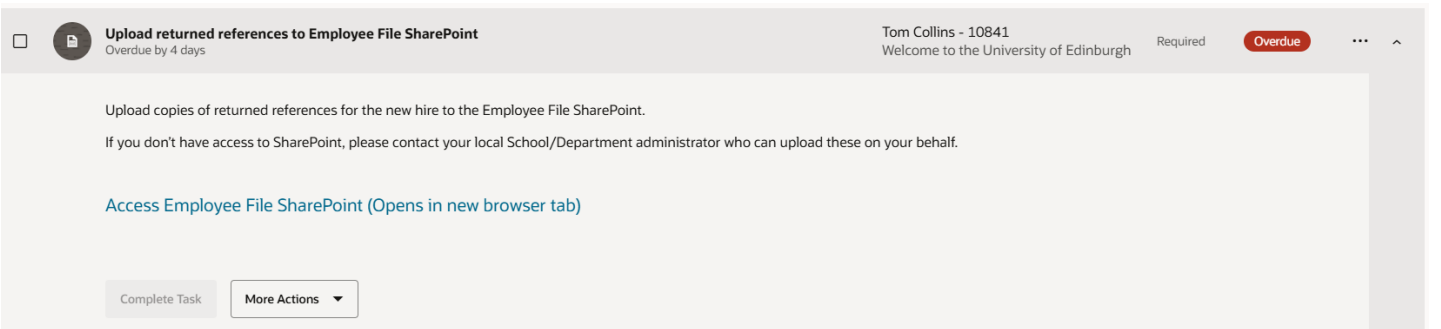
# My Tasks

This is an alternative way to view tasks assigned to you within your AOR.

1. From the People and Money homepage select **My Client Groups**, then **Journeys**. The default landing screen will be Organization Journeys. Navigate to **My Tasks**, this screen will show the list tasks you need to complete within your AOR.
2. Use the filters at the top of the page to search or to sort the order that the Journeys are displayed. By default, this screen will show Open Journeys, oldest tasks first.



3. Click on the name of the task you wish to view in more detail and to take action.



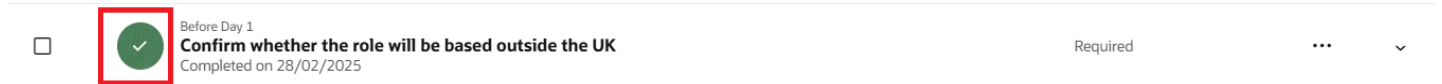
## Reviewing and Completing Tasks

1. You will be notified of tasks assigned to you and reminded by email and the notification bell, however you can monitor and take action to complete tasks from Organization Journeys or My Tasks. As an SDA your default view will be via Organization Journeys.
2. Follow the steps within the task, note that some tasks will take you to screens away from People

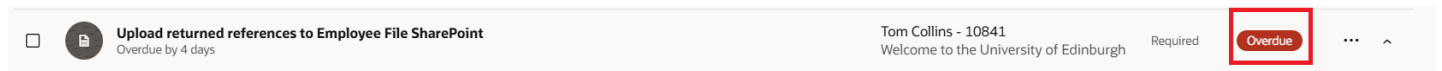
and Money. You should navigate back to the Task to complete if required.

## Tips

**Tasks with a green tick indicate they have been completed.**



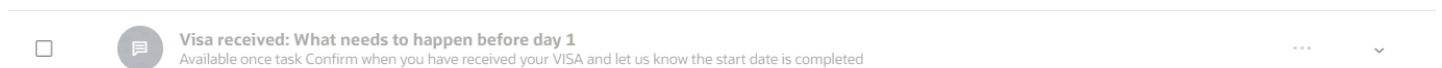
**Overdue Tasks** are clearly marked.



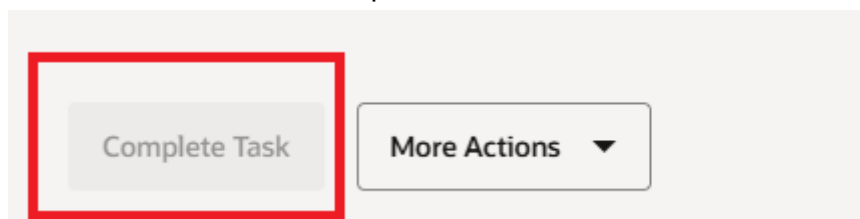
**Expired Tasks** - If the task has expired it will be displayed as a green circle with a white line through it. The task should be reopened to be able to take action and complete, do this by clicking on the **ellipsis** (three dots) next to the task name and selecting **Reopen Task**.



If the task is **greyed out** this means that the task cannot be completed until a prerequisite task is completed or until the start date of the task is reached.

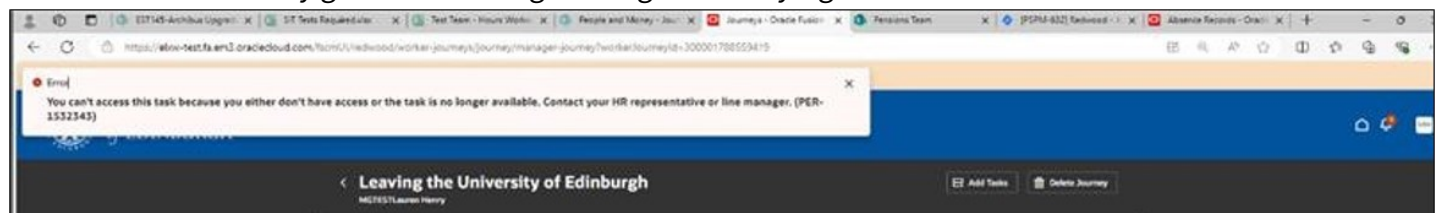


If the **Complete Task button is greyed out** this means you haven't followed the steps within the task to enable completion. For example, it may require you to follow a link to complete additional details or read additional information or upload a document.



**If you cannot access the task or links within**

You or other users may get the following message when trying to access tasks:



This is because the task has either expired or it is because you or the user is trying to access something that

is intended for another user e.g. an SDA trying to access a link which is intended for the worker.

If trying to access some of the links within a task for others, the user may be directed to their own information e.g. when you as an SDA access the link for annual leave or contact details, it will go to your own record, not the worker's. This is because it is intended for the worker, not for them and is as designed.

### Housekeeping of legacy checklists and tasks

With the move the Journeys we migrated all open and overdue checklists and tasks. It is beneficial to review these old checklists and tasks and close off any that are no longer required. Please follow the steps in the [SDA Guide to Housekeeping Legacy Checklists and Tasks](#) to complete this.

### Reassigning, Reopening, Edit Due Date and Sending Reminders for Tasks

Each task has been configured with additional functionality to enable you (where appropriate) to reassign, reopen, update a due date and send a reminder. The functionality differs between tasks. The steps below are written by taking action within Organization Journeys but apply equally to My Tasks

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

Person Name	Person Number	Job Title	Journey Name	Status	Assigned Date
		Research Associate	Enterprise Onboarding Checklist - Automatic	Open	1/04/2021
		Research Associate (IC1) (ACAD - Researcher)	Employment terminated due to immigration restrictions - Off boarding checklist	Open	6/04/2021
		Postdoctoral Research Associate	Enterprise Onboarding Checklist - Automatic	Open	19/05/2021
		Research Assistant	Internal moves/additional posts - Manual	Open	30/05/2021
		University Teacher in Mathematical Sciences	Redundancy - Off boarding checklist	Open	5/08/2021
		Tutor	Resignation - Off boarding checklist	Open	5/08/2021
		Tutor	Enterprise Onboarding Checklist - Automatic	Open	6/08/2021
		Tutor	Abandon contract - Off boarding checklist	Open	12/08/2021
		Tutor	Enterprise Onboarding Checklist - Automatic	Open	6/08/2021
		Tutor	Enterprise Onboarding Checklist - Automatic	Open	12/08/2021
		Tutor	Enterprise Onboarding Checklist - Automatic	Open	6/08/2021
		Tutor	Enterprise Onboarding Checklist - Automatic	Open	6/08/2021
		Tutor	Enterprise Onboarding Checklist - Automatic	Open	6/08/2021
		Tutor	Enterprise Onboarding Checklist - Automatic	Open	6/08/2021
		Tutor	Enterprise Onboarding Checklist - Automatic	Open	6/08/2021
		Tutor	Enterprise Onboarding Checklist - Automatic	Open	6/08/2021
		IT Intern	End of fixed term contract (<2years) - Off boarding checklist	Open	7/08/2021
		Tutor	Resignation - Off boarding checklist	Open	29/07/2021

- 2. Search for or click on the person you wish to review and then select the task you wish to take action

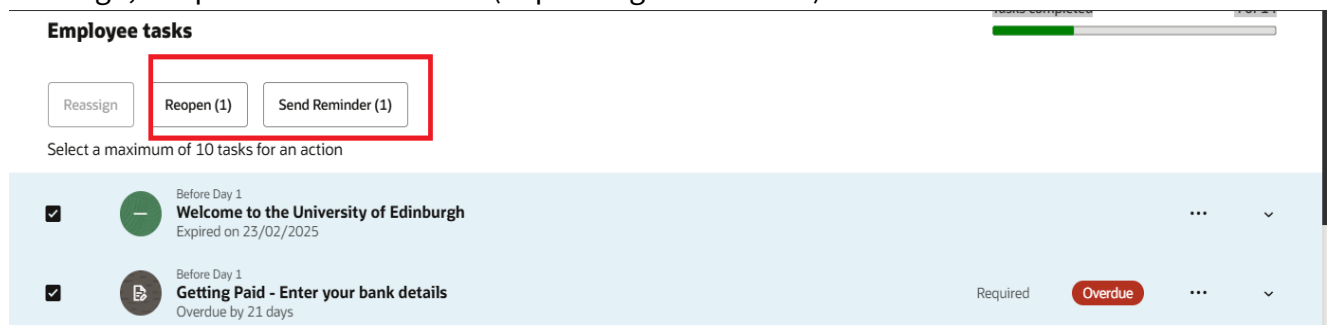
for from **My tasks**, **Employee tasks** or **Others' tasks**

3. Click on the ellipsis at the right-hand side of the task to expand the actions you can take, the action available will depend on the task and its status. For example, an SDA can send a reminder to the worker to complete their bank details but cannot reassign that task.



Actions that can be taken at task level and are task specific:

- **Reassign Task** – allows you reassign the task(s) to someone else
  - **Reopen Task** – allows you to reopen the task if it has been completed incorrectly or has expired
  - **Send Reminder** – by selecting this an email and alert on the bell icon will be sent to the person you are reminding
  - **Edit Due Date** – Allows you extend the due date of a task (Sponsored Worker-Certificate of Sponsorship Journey only)
4. Alternatively, **you can select multiple tasks** then navigate to the top of the page and select Reassign, Reopen or Send reminder (depending on the tasks)



## Tips

- Journeys migrated from legacy checklists and tasks will have different actions available.
- If you reopen a task that had a document record associated with it, the document record is deleted. Therefore, the document record will no longer be visible in the reopened journey task.
- Some tasks have a handy feature to '**Add to Calendar**' to allow you to set aside time to complete within your outlook calendar, look for the **More Actions** button to use this feature. Clicking "Add to Calendar" creates a calendar event with these details:
  - **Start Date:** The date the task was assigned
  - **End Date:** The task's due date
  - **Title:** The task name
  - **Description:** A link to the task in the app

You can edit the event to start or end at different dates if needed. By default, the calendar event

will be scheduled for the assigned date to the due date. The event will open and save in your default email provider's calendar.

- If you **reopen a task**, a notification will be sent via email and will be visible via the bell notification.

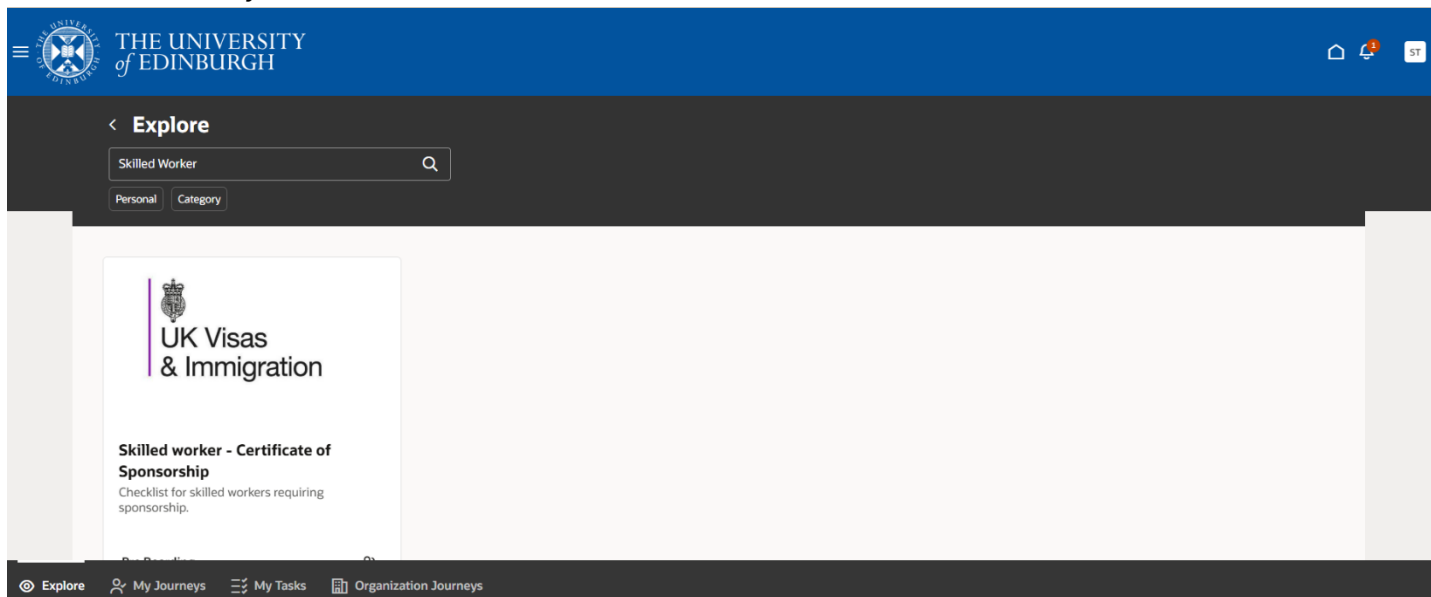
## Assigning a Journey manually

The following Journey must be assigned manually but all Journeys can also be assigned in this way should that be required.

- **Skilled Worker – Certificate of Sponsorship** – A journey to support the process for applying for a Skilled Worker Visa for new out of country skilled workers. **This should be assigned by the School or Department/Line Manager once the pending worker record has been created.** Further details on this process can be found in the [Guide to Sponsorship of Skilled Workers and Temporary Worker Sponsored Researchers](#).

To assign a Journey follow the steps below:

1. In People and Money, go to **My Client Group**, then **Journeys** and navigate to **Explore** and search for the Journey



2. Click on the Journey Name to review the details and select **Assign**

**Skilled worker - Certificate of Sponsorship**

**Assign** Actions

**Basic info**

Name: Skilled worker - Certificate of Sponsorship  
Category: Pre Boarding

Description: Checklist for skilled workers requiring sponsorship.

**Tasks**

Submit certificate of sponsorship (COS) request form to HR Required

Upload Certificate of Sponsorship (COS) confirmation letter

- Complete when to assign date select the person (type the name) take care when selecting the person you wish to assign the Journey to.

**Skilled worker - Certificate of Sponsorship**

Assign Journey Cancel Assign

When to assign?  
28/02/2025

Comments

Assignee Selection Type  
Person

Select a Person Required

- Check the details then click **Assign**, then navigate to Organization Journeys to check the assignment has been successful.

**Skilled worker - Certificate of Sponsorship**  
Assign Journey

When to assign?  
28/02/2025

Comments

Active - Payroll Eligible  
**Tom Collins**  
 PROFESSOR  
 pam.test.mailbox@ed.ac.uk

10841 X

+ Add Assignee

Cancel Assign

## Tips

- You should only manually assign a Journey once action has been taken within People and Money to show that the person is due to start, transfer, take on an additional post or be seconded.
- Where you need to assign the Journey to more than one person, please do this one at a time to ensure this is assigned correctly.
- If you manually assign the Welcome to the University or Rejoining the University Journey **all tasks** (before day 1 and day 1 to 90) will be become available from the date of assignment.

## Assigning Individual Task(s) manually

There are currently four available tasks to assign manually for roles that require a **Health Risk Assessment or NHS Honorary Cover**.

The following tasks are to supplement the standard Journeys configured in People and Money and should be manually added as per the table and process below.

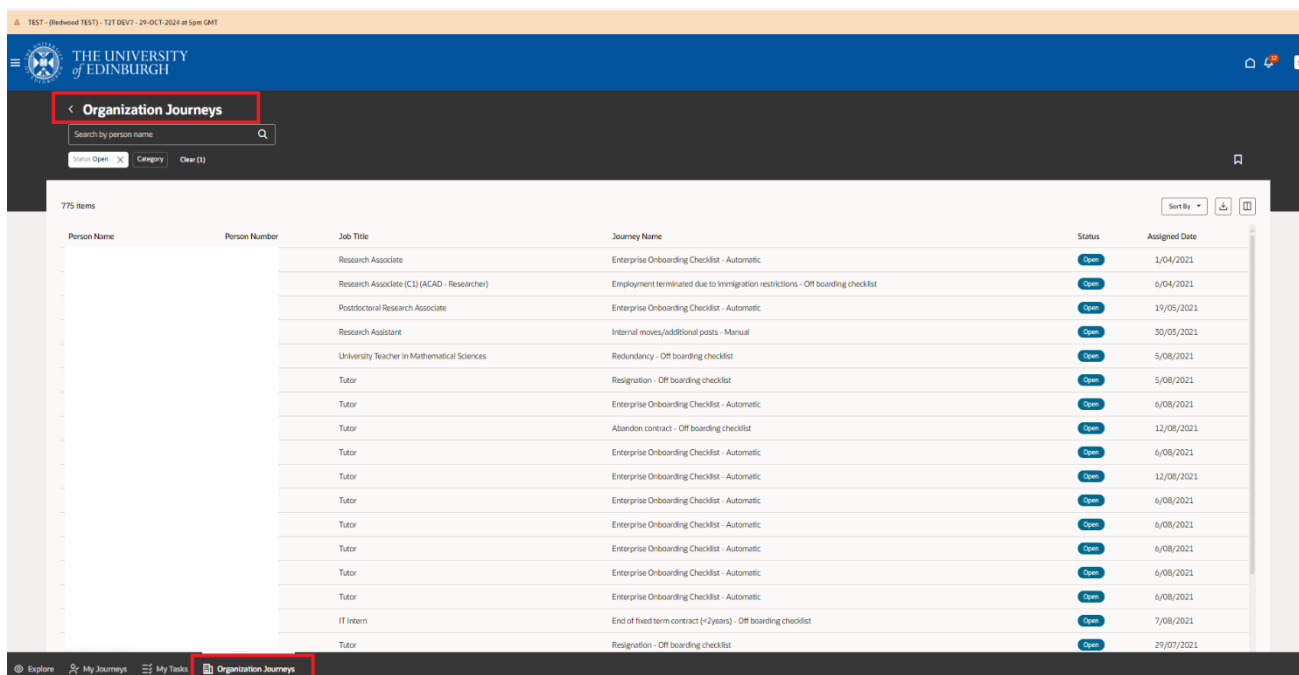
Task Name	Category	Description
Complete Key Job Hazards Evaluation	Health and Safety	<b>Line Managers or SDAs</b> should assign these tasks for anyone joining or moving into a role that requires a health risk assessment including, but not limited to: <ul style="list-style-type: none"> <li>Animal workers</li> <li>Laboratory Managers/Technicians/workers,</li> </ul>
Confirm that health and safety measures are in place	Health and Safety	

		<ul style="list-style-type: none"> <li>• Night workers, Workshop staff, Principal Investigators/Research Group Leaders</li> <li>• Cleaners</li> <li>• Maintenance staff</li> <li>• Swimming pool maintenance staff.</li> </ul> <p>Further information is available from the <a href="#">Health and Safety</a> webpages.</p>
Upload a copy of your most recent payslip along with a signed and dated CV	NHS	<p><b>Line Managers or SDAs should assign this task.</b> This is specific to new clinical staff (Doctors or Dentists). HR Operations require a copy of the payslip to match their starting salary and clinical increment date to issue their contract.</p> <p>Further information is available from the <a href="#">NHS Honorary Cover</a> webpage.</p>
Upload your confirmation letter of professional indemnity insurance (Doctors/Dentists)	NHS	<p>For information only – <b>these tasks will be assigned by HR Operations</b> as required for roles that require NHS honorary cover.</p> <p>Further information is available from the <a href="#">NHS Honorary Cover</a> webpage.</p>

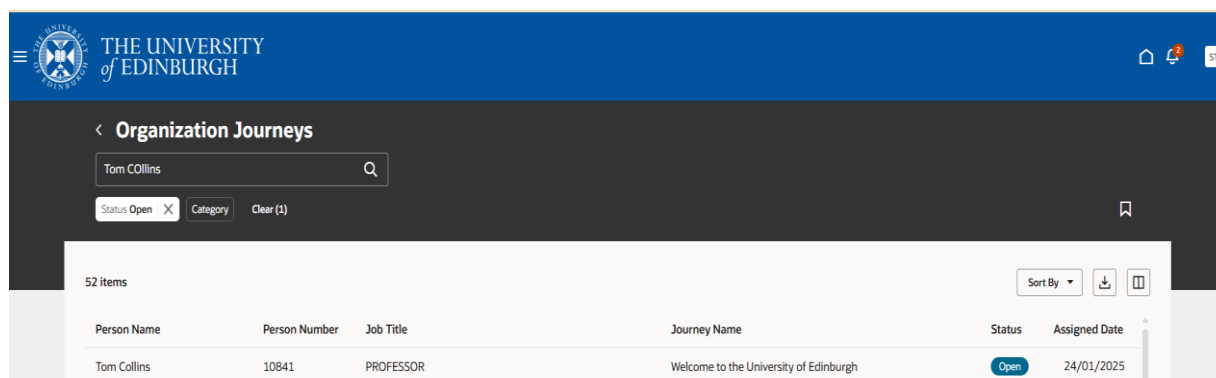
You can add tasks (from the task library) to a Journey **once** the Journey for the new hire, rehire or transfer **has been assigned**. The tasks can be assigned manually by a Line Manager, School/Department Administrator or HR Operations. Whilst the process only applies to the above tasks the action to assign will apply as and when the task library is enhanced.

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

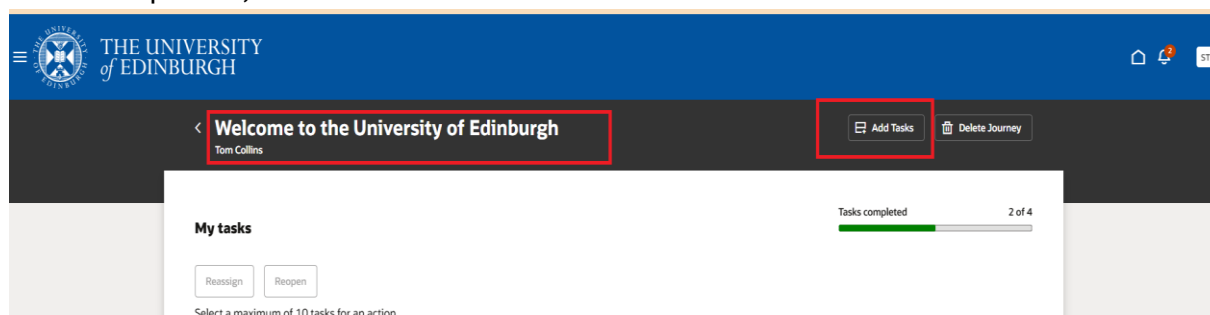




2. Search for the person you wish to assign the task(s) to, you should select the Journey most relevant to the tasks, this will likely be the Welcome to the University, Rejoining the University or Getting started in a new role.



3. Select the person, then Add Tasks



4. Complete the following fields:
  - **Name** – when you click on this field the tasks available to assign are listed

- **Performer** –this will be the person you have selected as above step
- **Phase** – if applicable, select if this is before day 1 or after day 1 task
- **Assign date** – the date you want the task to start
- To add more tasks click **Add Another**

5. Once you have added what you need click **Add to Journey**. Check the task(s) appear in the Journey you have added them to.

The screenshot displays the 'Add Tasks' interface within the University of Edinburgh system. At the top, there's a blue header with the university's name and logo. Below this, a dark grey bar contains the text 'Welcome to the University of Edinburgh' and 'Add Tasks'. A 'Cancel' button and an 'Add to Journey' button (highlighted with a red box) are located in the top right of this bar. The main content area features a form titled 'What tasks would you like to add?'. This form includes four input fields: 'Name', 'Performer', 'Phase', and 'Assign Date', each with a 'Required' label below it. Below the form is an 'Add Another' button. At the bottom left, there's an 'Assignee' section showing a user icon and the name 'Tom Collins'.

## Journeys for New joiners and staff returning to the University

The following Journeys support the pre boarding and onboarding process for new joiners and staff returning (rehires) to the University.

Journey Name	Description	Automatically or Manually Assigned	Journey assigned to
Welcome to the University of Edinburgh	For new hires once they become a 'pending worker' in People and Money. The Journey contains preboarding (before day 1) and onboarding tasks (day 1-90).	Automatic	Pending Worker Line Manager SDA HR Operations

Rejoining the University of Edinburgh	For anyone re-joining the University, the Journey becomes active once the rehire has taken place. The Journey contains preboarding (before day 1) and onboarding tasks (day 1-90).	Automatic	Pending Worker Line Manager SDA HR Operations
Probation Review Approaching	Journey for new hires and rehires only, will be assigned based on grade and contract type 5 months from start date (for 6-month probation) and 11 months from start date (for 12-month probation).	Automatic	Pending Worker Line Manager SDA
Welcome to Arcadia Nursery	For staff joining Arcadia nursery only	Automatic	Pending Worker SDA

## Probation Review Approaching Journey

The **Probation Review Approaching Journey** has been configured based on grades eligible for a probation review and contract type. This will be automatically assigned for new hires and rehires. A notification is sent at the point the task becomes active as per the table below and one reminder sent after 30 days. Further guidance for managing probation is available on the [Staff on Probation](#) webpage.

Task Name	When will task become available
6-month probation review required	This task will become available 5 months from the employee start date for eligible employees.
12-month probation review required	This task will become available 11 months from the employee start date for eligible employees.

### Tips

- The Probation Tasks above will only be available for Journeys assigned from 24 March 2025.

- Any inflight employees who were hired prior to this date will have the probation task titled 'Probation Review Required' (as per the Onboarding or Rehire checklists). This task will remain with existing timeframes (i.e. the task will be assigned to the line manager 5 months from the start date regardless of grade).
- In certain rehire situations the Probation Journey may not be required (for example when an employee was terminated in error and HR Operations have had to rehire). In this circumstance the Journey can be deleted.

## Journeys for Transfers, Additional Posts and Internal Secondments

The **Getting Started in a new role** journey supports employees, Line Managers and SDAs with staff that are transferring, taking on an additional assignment or moving to an Internal Secondment.

The Journey will be automatically assigned, there are **some important process steps to note and follow**:

- As the new SDA or line manager, you can't see the employee within your Area of Responsibility (AOR) or team structure in People and Money until their start date.
- **When the Journey is assigned before the start date this will assign tasks to the successful candidate's current primary assignment line manager and representatives (SDAs).** It is therefore important that the employee has discussed their intentions with their manager(s).
- Before day one the tasks must be reassigned to enable the new line manager / SDA to complete the appropriate onboarding tasks.

## Steps to Take to Reassign the tasks from Getting Started in a new role Journey

1. Once the offer has been accepted and the transfer, additional post or secondment action has been completed in People and Money check if the Getting started in a new role Journey has been assigned to your AOR, check Organization Journeys.
2. If not, use the staff directory to establish if the employee holds one or multiple posts with the University and who their line manager/SDA is. Please follow the guidance within [How to View and Search the Employee Directory](#) (under the heading of Personal Data Maintenance). The employee can identify their primary assignment line manager in People and Money by going to Me>Personal Information>Employment Info
3. Follow the appropriate route as per the table below:

	Action
<b>Advertised Post via People and Money</b>	<p>Please <b>contact the current Line Manager / SDA</b> to reassign the tasks using the <a href="#">email template</a>. If the employee moving holds multiple assignments you will need to contact the primary assignment line manager.</p> <p>If you need help contact the HR Helpline by raising a Service Request using the category Resourcing and they will reassign the tasks for you.</p> <p><b>Important:</b> The request for contract task must be completed as this prompts HR Operations to generate the employment contract or secondment letter and upload this for the employee to review and sign.</p>
<b>Non-Advertised Post</b>	<p>HR Operations will reassign the tasks <b>upon receipt of the Request for Transfer, Additional Post or Internal Secondment form</b> via Service Request. Once action taken in People and Money the tasks will be reassigned.</p> <p>In this scenario the request contract task will be removed as HR Operations will issue the contract/ secondment letter upon receipt of the form.</p>

## Journeys for Staff Leaving the University

There are two Journeys to support staff leaving the university, the table below provides more details. Both Journeys are automatically assigned based on the action reason used to terminate the employment record.

### Tip

- If an employee has multiple assignments and you are terminating them from an assignment that is not their primary assignment, the leavers' journey will be sent to the Line Manager and School/Department Administrator of the primary assignment once approved.
- As the Line Manager or SDA you do not receive the Journey as expected you can either take steps to identify the primary assignment line manager using the staff directory and ask that the tasks are reassigned. Alternatively, raise a Service Request using the category Resourcing and request that the End Assignment Journey is reassigned.
- If the employee leaving holds multiple assignments and is **leaving the University altogether** then a Journey will be assigned for each area in which they work. The primary assignment line

manager/SDA will receive the notification.

- Once the termination date is reached the employee will disappear from My Team (if you are an SDA who is a Line Manager), the tasks will continue to be available for action via My Tasks or Organization Journeys.
- If the termination is back-dated, i.e. the employee has already left, the employee will be unable to complete any allocated tasks as People and Money as access will have been removed.

<b>Journey Name</b>	<b>Description</b>	<b>Automatically or Manually Assigned</b>	<b>Journey Assigned to</b>
Leaving the University of Edinburgh	A Journey to support leaving the University process. For leavers with a termination reason: <ul style="list-style-type: none"><li>• Resignation</li><li>• Resignation - Retirement (Standard Retirement action reason)</li><li>• End of Fixed Term Contract</li><li>• Employment Terminated Due to Immigration Restrictions</li><li>• Redundancy</li><li>• Voluntary Severance</li><li>• Mutually Agreed Termination</li><li>• TUPE Out</li></ul>	Automatic once the termination is fully approved.	Employee Line Manager SDA
Leaving the University for an involuntary reason	A Journey to support leaving the University process. For leavers with a termination reason: <ul style="list-style-type: none"><li>• Dismissal (capability)</li></ul>	Automatic once the termination is fully approved.	Line Manager SDA

	<ul style="list-style-type: none"> <li>• Dismissal (conduct)</li> <li>• Dismissal (ill-health)</li> <li>• Dismissal (some other substantial reason)</li> <li>• Resignation - Retirement (ill health action reason)</li> <li>• Abandon Contract</li> </ul>		
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## Journeys for Staff Leaving their current post but remaining at the University

This Journey supports the process when an employee leaves one of their assignments but is continuing employment at the University. The table below provides more details. The Journey is automatically assigned based on the action reason used to end the assignment.

### Tips

- If an employee has multiple assignments and you are terminating them from an assignment that is not their primary assignment (i.e. their main assignment), the leavers' journey will be sent to the Line Manager and School/Department Administrator of the primary assignment once approved.
- As the Line Manager or SDA you do not receive the Journey as expected you can either take steps to identify the primary assignment line manager using the staff directory and ask that the tasks are reassigned. Alternatively, raise a Service Request using the category Resourcing and request that the End Assignment Journey is reassigned.

Journey Name	Description	Automatically or Manually Assigned	Journey Assigned to
End of Assignment but continuing at the University	A Journey to support staff leaving one of their assignments but continuing employment with the University process.	Automatic based on use of following action reasons: -End Assignment (Not resignation) -End Assignment (Resignation)	Employee Line Manager SDA

## Journeys for Staff Moving roles (Transfers and Internal Moves)

The Journey '**Moving Roles – Task to complete in your current role**' supports the process when an employee is **leaving their current role** and is transferring or starting an internal secondment. **This Journey highlights things to finish in the current role for the employee, line manager and SDA before they move.** The table below provides more details. The Journey is automatically assigned based on the action reason outlined.

The **Getting started in a new role** journey noted above supports the move /onboarding to the new role. Employees, Line Managers and SDAs with staff that are transferring, taking on an additional assignment or moving to an Internal Secondment will receive tasks to complete.

Where the employee holds multiple assignments (posts) the Journey will be assigned to the primary assignment line manager. As the Line Manager or SDA you do not receive the Journey as expected you can either take steps to identify the primary assignment line manager using the staff directory and ask that the tasks are reassigned. Alternatively, raise a Service Request using the category Resourcing and request that the End Assignment Journey is reassigned.

Journey Name	Description	Automatically or Manually Assigned	Journey Assigned to
Moving Roles – Task to complete in your current role	For internal transfers, additional posts and internal secondments and details tasks to complete in their current role. Journey is assigned when the transfer, secondment or additional assignment is processed in People and Money.	Automatic based on the use of the following action reasons: -Transfer -Secondment -Transfer to Non-Advertised Post -Add Assignment (Internal Secondment)	Employee Line Manager SDA

**Tip:** When an employee is moving to an internal secondment but retaining time in their substantive role (i.e. working part time in both) the Moving roles Journey will be assigned, this can be deleted as would not



be required in this circumstance. SDAs can delete this or request this from the HR Helpline.

## Requesting a Contract

The university has a legal obligation to ensure a contract is received by the appointed candidate **by day one of employment**. This is equally applicable to staff employed on a Guaranteed hours contract.

A contract of employment must be issued for **all new hires, rehires, transfers and additional post appointments**. Internal Secondments will receive a letter confirming their secondment arrangements.

For new hire and rehires, contracts will be issued once Right to Work checks have been satisfied and evidence uploaded to Document of Record. Contracts can be generated with subject to clauses where other pre-employment checks have not been fully completed.

The table below outlines when a new contract must be requested.

Hiring Scenario	Journey	When to complete the Request Contract Task
New Hire	Welcome to the University of Edinburgh	Once the Upload proof of right to work (RTW) task has been completed (and if applicable the PVG Check has been confirmed as satisfactory).
Rehire	Rejoining the University of Edinburgh	Once the Upload proof of right to work (RTW) task has been completed (and if applicable the PVG Check has been confirmed as satisfactory).
Additional Assignment	Getting started in a new role	<b>For advertised posts</b> Once you have an agreed start date complete the request contract (internal hire) task, (and if applicable the PVG Check has been confirmed as satisfactory).  <b>For non-advertised posts</b> Once you have submitted the Request for Transfer, Additional Post or Internal secondment form HR Operations will action the request contract task with this request. There is no need to
Transfer		
Internal Secondment		

		complete this task in this scenario, HR Operations will remove this task. (If the role requires a PVG Check please attach the confirmation with the request via SR).
--	--	--

### Before you start

1. Ensure the Upload proof of right to work (RTW) task has been actioned and marked as complete (this is not required if internal transfer, additional post or secondment).
2. Agree a start date and check this is correct on the workers record.
3. Agree the work schedule (working pattern) that should be assigned to the employee's record. This is applicable to all types of hire; every employee must have a work schedule attached to their record and for each assignment they hold with the university. Please see the [Work Schedule Calculator](#) for information.
4. Note any **Allowances** that should be included in the contract and paid to the employee from their start date, these **MUST** be added to the request contract task if applicable. If the approval for the allowance was not included in the original Job Requisition Business Case please ensure appropriate approval is attached. If the **costing codes** for this allowance differ from the salary codes please also specify this.
5. **If the worker requires to hold a Protection of Vulnerable Groups (PVG) Certificate** for their role this must be confirmed **BEFORE** they can start work and the request contract task completed. Once you receive confirmation this is in place please attach the confirmation email from the countersignatory team to the **comments and attachments section**, noting this in the comments section. Note HR Operations will not issue the contract until this is received.
6. Add any additional information to the comments and attachments.

### Completing the Request Contract Task

1. From the People and Money homepage select **My Client Groups**, then **Journeys**. The default landing screen will be **Organization Journeys**
2. Click on the person you wish to view in more detail and find the Request Contract task

Welcome to the University of Edinburgh
Add Tasks
Delete Journey

My tasks
Tasks completed 3 of 4

Reassign Reopen

Select a maximum of 10 tasks for an action

<input type="checkbox"/>	Before Day 1 Upload proof of right to work (RTW) Expired on 23/02/2025	Required	...	▼
<input type="checkbox"/>	Before Day 1 Confirm whether the role will be based outside the UK Completed on 28/02/2025	Required	...	▼
<input type="checkbox"/>	Before Day 1 Request contract Due in 3 days	Required	...	▼
<input type="checkbox"/>	Day 1-90 Upload returned references to Employee File SharePoint Expired on 1/03/2025	Required	...	▼

- Click on the **name of the task** to expand the task description and then complete all of the required fields, note anything marked with an asterisk\* is mandatory. Use the comments and attachments section to provide further additional information for HR Operations. The table [below](#) provides further information about what should be completed for each field. The screenshot below is an example of *some* of the fields.

Welcome to the University of Edinburgh
Sandro Tonalì

Work Schedule
Required

Details of work schedule if not listed

Will the person be working abroad or the role require overseas working?  
☐ No  
☐ Yes  
Required


Have all requested references been returned?  
☐ No  
☐ Yes  
Required

Are there any remaining right to work documents to verify?  
☐ No  
☐ Yes  
Required

Disclosure Scotland or overseas criminal record check received (If applicable)?  
☒ Not required

- Once you have entered the required information **scroll to the bottom of the screen and drag and drop any attachments (if required)**, if adding an attachment please note this in the comments,

then select **Submit request for contract**. HR Operations will receive a notification to process the contract, once they have completed this you will be able to see the contract in the employees Document Record.



The screenshot shows a form interface. At the top, there is a dashed rectangular box labeled 'Drag and Drop' with the text 'Select or drop files here.' below it. Below this, there is a dark button labeled 'Submit request for contract' and a light button labeled 'More Actions' with a downward arrow.

### Tips

- Using **More Actions** you can add save the form as a draft – remember to go back and submit once you are ready.

### Request Contract - Fields to complete

Anything marked with an asterisk\* is a mandatory field.

GH- Guaranteed Hours

Field Name	What to enter
*Start Date	First date of employment
*Work Schedule	Use the <a href="#">work schedule calculator</a> to generate the pattern and select this from the drop-down menu. If the pattern you need is not listed, use the closest match please provide the work schedule in the 'Details of Work Schedule if not listed' field to provide the Work Schedule required.
Details of work schedule if not listed	Use the work schedule naming convention to provide details of a work schedule not listed above.
*Will the person be working abroad or require overseas working	Used to indicate if the worker will be based overseas.
*Have all requested references been returned?	Used to indicate if the contract will be issued subject to references.

*Are there any remaining right to work documents to verify?	Indicates status of right to work.
*Disclosure Scotland or overseas criminal record check received (If applicable)?	Indicates the status of check. Specify "Yes" or "No" if this check is applicable; otherwise, leave it as "Not applicable".
*Has PVG or overseas criminal record check been received (If applicable)	If this check is not applicable leave it as "Not applicable".  <b>If the worker requires a PVG certificate this must be confirmed BEFORE they can start work. Once received please specify "Yes" and attach the confirmation email from the countersignatory team to the comments and attachments section. Note HR Operations will not issue a contract until this is received.</b> It's helpful to note if you add an attachment in the comments section.
*Has counter terrorism check been received (If applicable)?	Indicates the status of check. Specify "Yes" or "No" if this check is applicable; otherwise, leave it as "Not applicable".
*Has certification of specialist registration been received (If applicable)?	Indicates the status of check. Specify "Yes" or "No" if this check is applicable; otherwise, leave it as "Not applicable".
*Has occupational health clearance been received (if applicable)?	Indicates the status of check. Specify "Yes" or "No" if this check is applicable; otherwise, leave it as "Not applicable".
*Youth/Student Employment	Only specify if the post is a Youth/Student employment post; otherwise leave as "Not applicable".
Period Hours Cover (GH only)	Only specify another option if this is for GH contract, otherwise leave "Not Applicable" selected.  Period that hours above cover <ul style="list-style-type: none"> <li>1) Over period of Current GHC</li> <li>2) Over period of current FTC</li> <li>3) Per Year</li> <li>4) Per Year, Every Year</li> <li>5) Per Year, Every Year – over Duration of FTC</li> </ul>

Annually Reviewed (GH only)	<p>Only specify another option if this is for a GH contract, otherwise leave blank</p> <p>Is the GH contract reviewed annually?</p> <p>1) No</p> <p>2) Yes</p>
Period End Date (GH Only)	Enter the end date of the GH period.
Number of hours per year (Annual/Fractional Only)	Hours to be worked per year for annualised/fractional staff – enter the number of hours.
Number of weeks per year (Fractional only)	Number of weeks per year – enter the number of weeks.
Average weekly working hours (Annualised only)	Average weekly working hours for annualised staff – enter the number of hours.
Details of Allowances	<ul style="list-style-type: none"> <li>Records any allowances to be applied to the contract.</li> <li>Please provide details of any allowances to be included in the contract and paid to the employee from start date. If the approval for the allowance was not included in the original Job Requisition Business Case please ensure appropriate approval is attached.</li> <li>If the costing codes for this allowance differ from the employee's salary codes please also specify this.</li> </ul>
Comments	Any additional information relating to the hire, it's helpful to include here a brief note of any attachments you are including.
Attachments	Use this to drag and drop /attach any other relevant documents, if a PVG certificate is required please attach the confirmation email here.

## Appendix

### Appendix 1 – Pre-24 March 2025 Legacy Checklists

Note these checklists can no longer be assigned but any in flight checklists have transitioned to Journeys and the tasks within will remain users will still see these within Journeys.

#### Archived Onboarding Checklists

Checklist Name	Description
<b>Enterprise Onboarding Checklist</b> (This includes the Generic Preboarding checklist and the Day 1-90 Onboarding Checklist)	The generic preboarding checklist is automatically provisioned for <b>new hires</b> 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 <a href="#">Guidance - Use of the Skilled Worker Checklist</a> (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.

## Archived 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 – Email Template

You can use this template email to request that the **tasks** for **Getting Started in a new role** Journey are reassigned to the school or department they are joining.

**Hi <<Line Manager/ SDA>>**

As you may be aware <<Employee Name>> is <<transferring/taking on an additional post/secondment>> to <<job title>> within <<School/Department>> from <<start date>>.

To support this process please can you reassign the tasks within the Journey titled 'Getting started in a new role' in People and Money to <<Name>> by following the steps below:

### To Reassign the Tasks:

1. From the People and Money homepage select Organization Journeys (SDA) or My Team (Line Manager) then **Journeys**.
2. Search for or click on the person you wish to reassign tasks for
3. Select all tasks within the Getting started in a new role journey from **My tasks**, or **Others' tasks**
4. Click on the **Reassign** at the top of the screen
5. Enter the person's name whom you are reassigning the tasks to and then click **save**, take care that it is the correct active person.



If you experience any problems reassigning tasks please contact the HR Helpline by raising a Service Request, using the category Resourcing.

## Appendix 3 – Journeys in Detail

### Welcome to the University of Edinburgh

Task Name	Category	Performer	Owner	Pre-requisite task?
Welcome to the University of Edinburgh	Before day 1	Pending worker	School/Dept Admin	No
Upload proof of right to work (RTW)	Before day 1	School/Dept Admin	Line Manager	No
Getting Paid – Enter Your Bank Details	Before day 1	Pending worker	School/Dept Admin	No
Information to help you welcome your new start	Before day 1	Line Manager	School/Dept Admin	No
Confirm whether the role will be based outside the UK	Before day 1	School/Dept Admin	Line Manager	No
Request contract (Rehire)	Before day 1	School/Dept Admin	Line Manager	No
Complete Statutory reporting questions for (HESA and REF)	Before day 1	Line Manager	School/Dept Admin	No
Input Emergency contact Information	Before day 1	Pending worker	School/Dept Admin	No
Add work schedule & salary costings then upload contract to Document Records	Before day 1	HR Operations	School/Dept Admin	Request Contract
Your contract is ready to sign	Before day 1	Pending worker	School/Dept Admin	Add work schedule & salary costings then upload contract to Document Records

Apply for your staff card	Before day 1	Pending worker	School/Dept Admin	No
Check annual leave balance for your new staff member	Day 1-90	Line Manager	School/Dept Admin	No
Assign Learning to your team member	Day 1-90	Line Manager	School/Dept Admin	No
Check your bank details for your salary are correct	Day 1-90	Employee	Payroll	No
Provide your tax information for HMRC	Day 1-90	Employee	Payroll	No
Update your personal details and complete equality information	Day 1-90	Employee	School/Dept Admin	No
Did your new hire turn up?	Day 1-90	Line Manager	School/Dept Admin	No
Complete expected learning	Day 1-90	Employee	Line Manager	No
Upload returned references to Employee File SharePoint	Day 1-90	School/Dept Admin	Line Manager	No
Review and update your Skills and Qualifications	Day 1-90	Employee	Line Manager	No
Settling in and making the most of your onboarding experience	Day 1-90	Employee	Line Manager	No
Tell us about your joining experience	Day 1-90	Employee	HR Operations	No

### Rejoining the University of Edinburgh

Tasks	Category	Performer	Owner	Pre-requisite task
Welcome to the University of Edinburgh	Before day 1	Pending worker	School/Dept Admin	No
Upload proof of right to work (RTW)	Before day 1	School/Dept Admin	Line Manager	No

Information to help you welcome your new start	Before day 1	Line Manager	School/Dept Admin	No
Confirm whether the role will be based outside the UK	Before day 1	School/Dept Admin	Line Manager	No
Request contract (Rehire)	Before day 1	School/Dept Admin	Line Manager	No
Complete Statutory reporting questions for (HESA and REF)	Before day 1	Line Manager	School/Dept Admin	No
Input Emergency contact Information	Before day 1	Pending worker	School/Dept Admin	No
Add work schedule & salary costings then upload contract to Document Records	Before day 1	HR Operations	School/Dept Admin	Yes - Request contract
Your contract is ready to sign	Before day 1	Pending worker	School/Dept Admin	Add work schedule & salary costings then upload contract to Document Records
Apply for your staff card	Before day 1	Pending worker	School/Dept Admin	No
Check annual leave balance for your new staff member	Day 1-90	Line Manager	School/Dept Admin	No
Assign Learning to your team member	Day 1-90	Line Manager	School/Dept Admin	No
Check your bank details for your salary are correct	Day 1-90	Employee	Payroll	No
Provide your tax information for HMRC	Day 1-90	Employee	Payroll	No
Update your personal details and complete equality information	Day 1-90	Employee	School/Dept Admin	No
Did your new hire turn up?	Day 1-90	Line Manager	School/Dept Admin	No

Complete expected learning	Day 1-90	Employee	Line Manager	No
Upload returned references to Employee File SharePoint	Day 1-90	School/Dept Admin	Line Manager	No
Review and update your Skills and Qualifications	Day 1-90	Employee	Line Manager	No
Settling in and making the most of your onboarding experience	Day 1-90	Employee	Line Manager	No
Tell us about your joining experience	Day 1-90	Employee	HR Operations	No

### Probation Review Approaching

Tasks	Category	Performer	Owner	Pre-requisite Task?
12-month probation review required*	Day 1-90	Line Manager	School/Dept Admin	No
6-month probation review required*	Day 1-90	Line Manager	School/Dept Admin	No

\*Only the appropriate task for the associated grade will appear

### Getting started in a new role

Tasks	Category	Performer	Owner	Pre-requisite Task?
Assign Learning to your team member	Movers	Line Manager*	School/Dept Admin	No
Update your personal details and complete equality information	Movers	Worker	School/Dept Admin	No
Complete expected learning	Movers	Worker	Line Manager	Yes - Learning to your team member
Request contract (internal hire)	Movers	School/Dept Admin*	Line Manager	No

Add work schedule & salary costings then upload contract to Document Records	Movers	HR Operations	School/Dept Admin	Yes - Request contract (internal hire)
Your contract is ready to sign	Movers	Worker	School/Dept Admin	Yes - Add work schedule & salary costings then upload contract to Document Records
Confirm whether the role will be based outside the UK	Movers	School/Dept Admin*	Line Manager	No
Information to help you welcome your new start	Movers	Line Manager*	School/Dept Admin	No
Complete Statutory reporting questions for (HESA and REF)	Movers	Line Manager*	School/Dept Admin	No
Upload returned references to Employee File SharePoint	Movers	School/Dept Admin*	Line Manager	No

### Skilled Worker Certificate of Sponsorship

Tasks	Category	Performer	Owner	Pre-requisite Task?
Submit certificate of sponsorship (COS) request form to HR	International Staff	School/Dept Admin	Line Manager	No
Upload Certificate of Sponsorship (COS) confirmation letter	International Staff	HR Operations	HR Operations	Submit certificate of sponsorship (COS) request form to HR
For information: Certificate of Sponsorship	International Staff	School/Dept Admin	Line Manager	Upload Certificate of Sponsorship

(CoS) application processed				(COS) confirmation letter
Here is your Certificate of Sponsorship (COS) number	International Staff	Pending Worker	School/Dept Admin	Upload Certificate of Sponsorship (COS) confirmation letter
Review and eSign terms of Interest Free Visa Loan	International Staff	Pending Worker	School/Dept Admin	Here is your Certificate of Sponsorship (COS) number
Submit your interest free visa loan application	International Staff	Pending Worker	School/Dept Admin	Review and eSign terms of Interest Free Visa Loan
Confirm when you have received your VISA and let us know the start date	International Staff	Pending Worker	School/Dept Admin	Here is your Certificate of Sponsorship (COS) number
Entering the UK and preparing for your arrival	International Staff	Pending Worker	School/Dept Admin	Confirm when you have received your VISA and let us know the start date
Visa received: What needs to happen before day 1	International Staff	School/Dept Admin	Line Manager	Confirm when you have received your VISA and let us know the start date
Upload PDF of online Right to Work confirmation and checklist	International Staff	School/Dept Admin	Line Manager	Confirm when you have received your VISA and let us know the start date

Manager responsibilities for Sponsored Staff	International Staff	Line Manager	Line Manager	Upload PDF of online Right to Work confirmation and checklist
Sponsorship responsibilities during employment	International Staff	Pending Worker	Line Manager	Upload PDF of online Right to Work confirmation and checklist

### Welcome to Arcadia Nursery

Tasks	Category	Performer	Owner	Pre-requisite Task?
Getting Paid - Enter your bank details	Before day 1	Pending worker	Payroll	No
Provide your tax information for HMRC	Day 1-90	Pending worker	Payroll	No
Input Emergency contact Information	Before day 1	Pending worker	School/Dept Admin	No

### Leaving the University of Edinburgh

Tasks	Category	Performer	Owner	Pre-Requisite Task?
Review and take your annual leave before leaving	Offboarding	Worker	Line Manager	No
People and Money tasks for departing team member	Offboarding	Line Manager	School/Dept Admin	No
Things to finish in People and Money before you leave	Offboarding	Worker	Line Manager	No
Exit Survey - Tell us about your experience	Offboarding	Worker	Line Manager	No

Review your pension options	Offboarding	Worker	Line Manager	No
Handover, property returns, and final responsibilities	Offboarding	Worker	Line Manager	No
Exit tasks to complete for your departing employee	Offboarding	Line Manager	School/Dept Admin	No
Exit task for a departing employee in your School/Dept	Offboarding	School/Dept Admin	Line Manager	No

### Leaving the University for an involuntary reason

Tasks	Category	Performer	Owner	Pre-requisite Task?
People and Money tasks for departing team member	Offboarding	Line Manager	School/Dept Admin	No
Exit tasks to complete for your departing employee	Offboarding	Line Manager	School/Dept Admin	No
Exit task for a departing employee in your School/Dept	Offboarding	School/Dept Admin	Line Manager	No

### End of Assignment but continuing at the University

Tasks	Category	Performer	Owner	Pre-requisite Task?
Review and take your annual leave before leaving your role	Offboarding	Worker	Line Manager	No
Things to finish in People and Money	Offboarding	Worker	Line Manager	No
Handover, property returns, and final responsibilities	Offboarding	Worker	Line Manager	No
People and Money tasks for departing team member	Offboarding	Line Manager	School/Dept Admin	No



Exit tasks to complete for your departing employee	Offboarding	Line Manager	School/Dept Admin	No
Exit task for a departing employee in your School/Dept	Offboarding	School/Dept Admin	Line Manager	No

### Moving Roles – Tasks to complete in your current role

Tasks	Category	Performer	Owner	Pre-requisite Task?
Review your annual leave before moving to your new role	Movers	Worker	Line Manager	No
Things to finish in People and Money before moving role	Movers	Worker	Line Manager	No
Internal moves survey – Tell us about your experience	Movers	Worker	Line Manager	No
Handover, property returns, and final responsibilities	Movers	Worker	Line Manager	No
Line Manager tasks for an employee moving role	Movers	Line Manager*	School/Dept Admin	No
People and Money Line Manager tasks for employee moving roles	Movers	Line Manager*	School/Dept Admin	No
School/Dept Administrator tasks for an employee moving roles	Movers	School/Dept Admin*	Line Manager	No

### Version History

Version	Date	Description	Approved By
0.1	N/A	Draft	
1.0	24/03/25	First version for publication	ME
2.0	19/5/25	Updated to reflect changes in 25B quarterly release	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.