



System User Guide

Pending Worker/Employee Guide to Journeys

We realise this formatting may not be accessible for all – to request this document in an alternative format please email hrhelpline@ed.ac.uk

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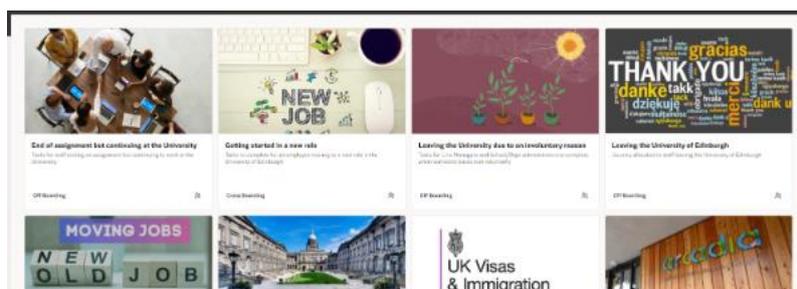
Introduction

This guide covers key tasks for pending workers and employees to support the starter, internal moves and leaver processes. A pending worker is someone who has accepted an offer of employment and commenced their preboarding activities with the University but has not reached their start date.

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). Tasks within the Journey will be assigned to pending worker/employee, Line Managers and School/Department Administrators (SDAs), HR Operations will also receive tasks to complete.

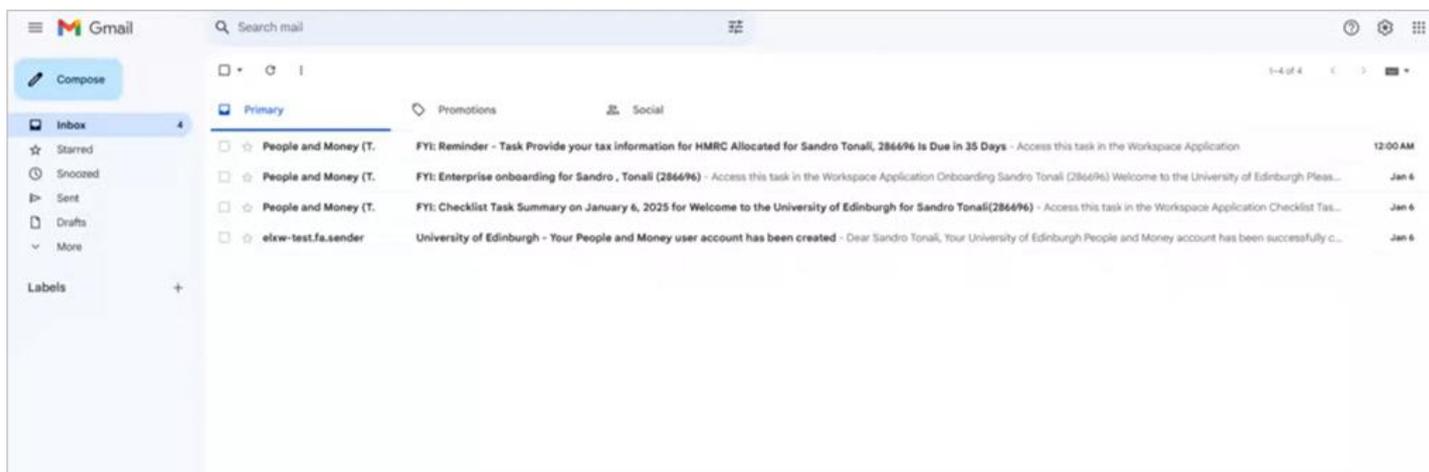
Pending workers and employees will have access to My Journeys and My Tasks within the Journeys app, it is recommended you take action directly from there. You will also be notified of tasks assigned to you and reminded via the notification bell and via email

From 24 March 2025, existing onboarding and leaver checklists will move to Journeys within People and Money. Any existing tasks will remain and as users you should continue to work through and complete those in progress.



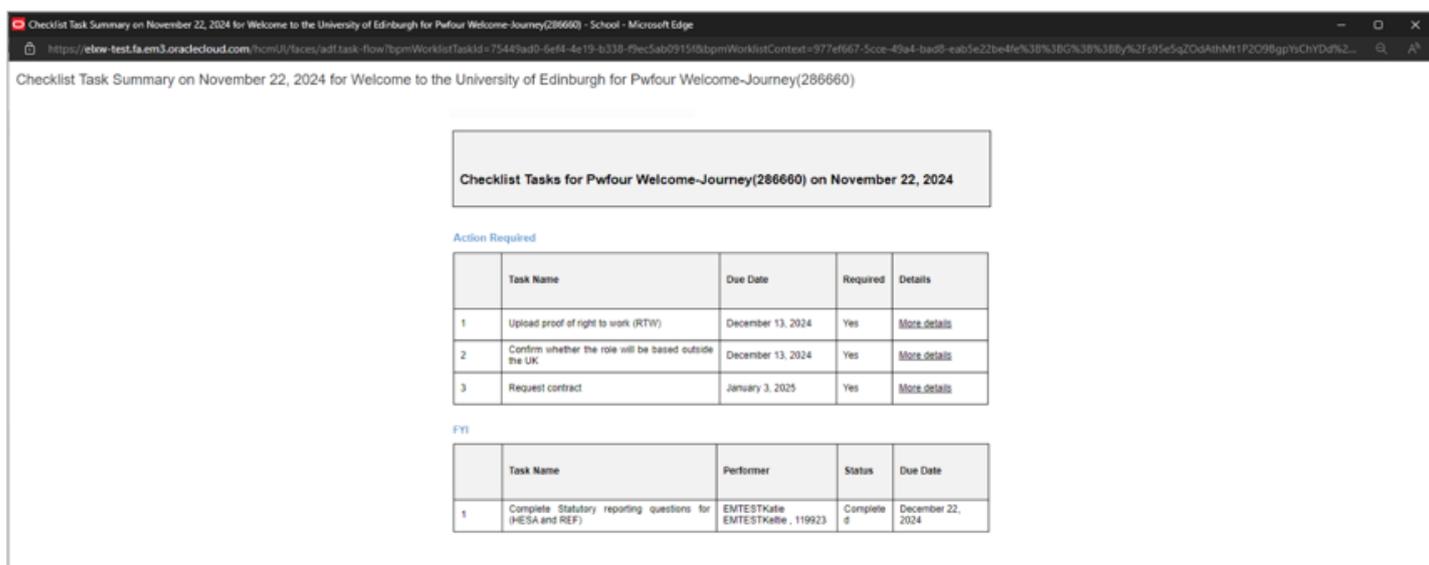
Notifications and logging in to People and Money

Once you have been successful in securing a role within the University, you become what is called a Pending Worker within the People and Money system, and as a result, you will receive a number of email notifications. The most important being the email advising you how to log in and set your password. You should action this email promptly. If you do not see this in your inbox, please check your junk or spam email folders.



From day 1 your access will change as you become an employee, you will need to log in using your staff log in details. Your line manager or local school or department administrator will provide this to you.

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.



Important Information for New Starts and anyone Rejoining the University

There are a series of tasks to be completed which are designed to ensure that the University meets its legal obligations of setting up any new employees on our HR and Finance System known as People and Money. A full list of the tasks you will need to complete can be found in the Appendices.

So that we can **pay you correctly** there are tasks that you **must complete outlined below**, note the difference if you are a new start or returning to the University.

New Starts

For all **new hires** who have not worked at the University before 3 tasks must be completed:

Before Day 1 Task:

<input type="checkbox"/>	 Before Day 1 Getting Paid - Enter your bank details Due in 4 days	Required	...	▼
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Please complete this above task before you start.

Day 1 Tasks – must be completed on day 1:

<input type="checkbox"/>	 Day 1-90 Check your bank details for your salary are correct Overdue by 3 days	Required	Overdue	...	▼
<input type="checkbox"/>	 Day 1-90 Provide your tax information for HMRC Due in 32 days	Required		...	▼

Please complete these tasks on day 1 of employment.

Rejoining the University

For anyone **returning to the University** there are **two tasks** you must complete **on day one**:

<input type="checkbox"/>	 Check your bank details for your salary are correct Due in 7 days	Required	...	▼
<input type="checkbox"/>	 Provide your tax information for HMRC Due in 42 days	Required	...	▼

This information must be provided and the tasks completed by the end of day one of employment, please note:

- If you are new to the University, you must provide your **UK** bank details
- Anyone **returning** to the University **must check** that the bank details provided previously are still correct
- **Failure to provide/check your bank details on day one may result in a delay to your first pay being received**
- It is also necessary for you to **provide your tax information for HMRC by completing this task**, you can upload a copy of your P45, if you do not have a P45 you must complete the new starter declaration. If you do not complete this task you might end up being put on emergency tax code or paying too much tax. **Please note that you must complete this task by the 18th of the month in which you join, after this the task will be locked and cannot be completed.**
- **Staff on guaranteed hours contracts** - must have entered or checked these details on day one of employment at the latest. It is important you **do not wait** until you are making a claim for hours worked to provide this.
- It is important that you complete **all** Onboarding tasks assigned to you as soon as possible.
- The task 'Your contract is ready to sign' 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.
- Please follow the detailed steps below to help you navigate and complete tasks in Journeys

If you experience any issues in completing any onboarding tasks before you start, please email the HR helpline at hrhelpline@ed.ac.uk

Sponsored Workers - Skilled Worker-Certificate of Sponsorship Journey

If you are a new joiner that requires sponsorship by the University to obtain a new in country Skilled Worker Visa you will be allocated an additional Journey to help guide you through this process. If you have any questions about this speak to your line manager or local school/department administrator in the first instance.

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.

Navigating Journeys

1. From the People and Money homepage select **Me**, then **Journeys**.
2. Navigation within Journeys depends on the role you have within People and Money. As an Employee you will have access to:
 - My Journeys
 - My Tasks

My Journeys

1. From the People and Money homepage select **Me**, then **Journeys**. The default landing screen will be **My Journeys**.
2. Click on the Journey you wish to view in more detail, this will display the Tasks you need to complete and the status of each.
3. Click on the task name to show the detail.

My Tasks

1. From the People and Money homepage select **Me**, then **Journeys then My Tasks**.
2. The page will open with a default status of **Open**. Use the **Search** and **Sort by** Functions the page to refine your search and display settings.
3. Click on the task name to show the detail and to complete the steps within the task

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 **My Journeys or My Tasks**.
2. 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.
3. 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.**

How to complete the Before Day 1 task 'Enter you Bank Details' (for new hires)

1. From the People and Money homepage select **Me**, then **Journeys**. Navigate **to the Getting Paid – Enter your bank details task**.
2. Follow the instructions on screen to enter your UK Bank Account details in which your salary will be paid. **Click Add** to enter the bank details.
3. Complete the required fields
4. Then **click Create**
5. Click **Complete Task**
6. **On day 1, you will receive a further task 'Check your bank details for your salary are correct' you should follow the instructions on screen and then select complete task. If you are returning to the University, you must check your bank details and complete this task following the steps above to make any amendments.**

How to complete the Day 1 Task 'Provide your Tax Information for HMRC' (for new hires and rehires)

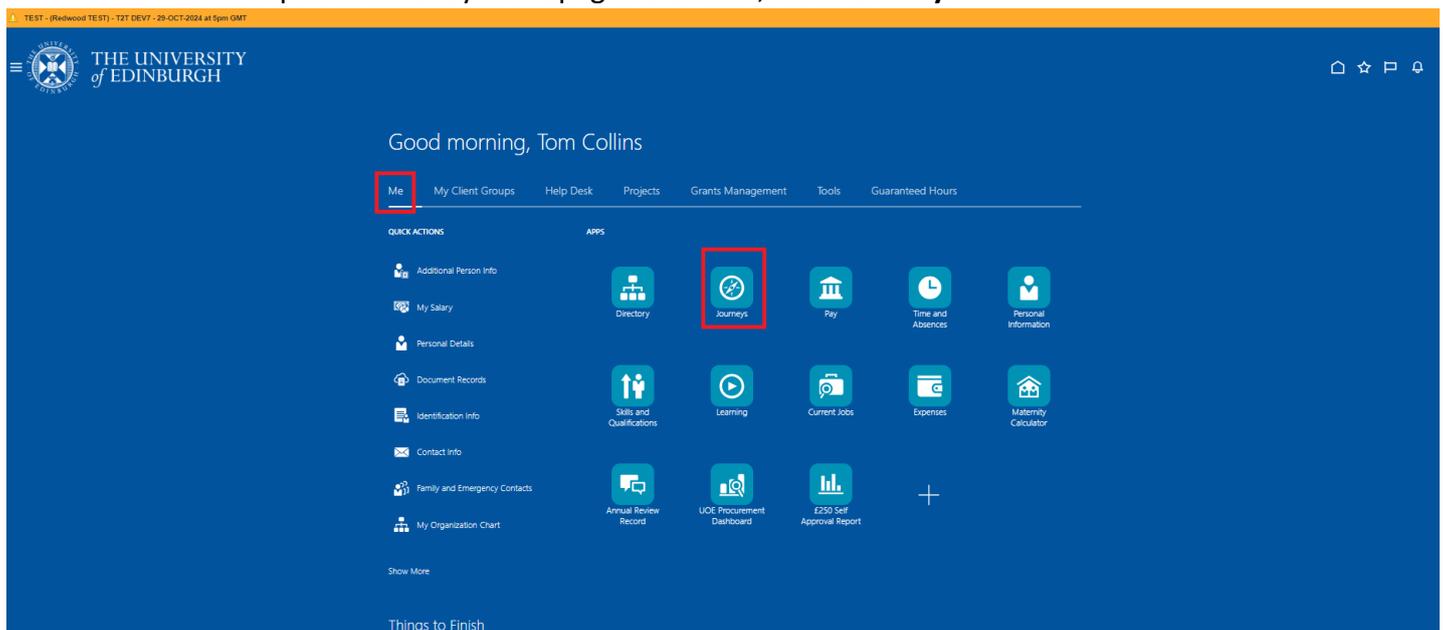
1. From the People and Money homepage select **Me**, then **Journeys**. Navigate **to the task 'Provide your Tax Information for HMRC'**
2. Follow the instructions on screen to complete the New Starter Declaration or upload a copy of your P45
3. Once you have uploaded your P45 or completed the new starter declaration then click **Complete Task**

In Detail

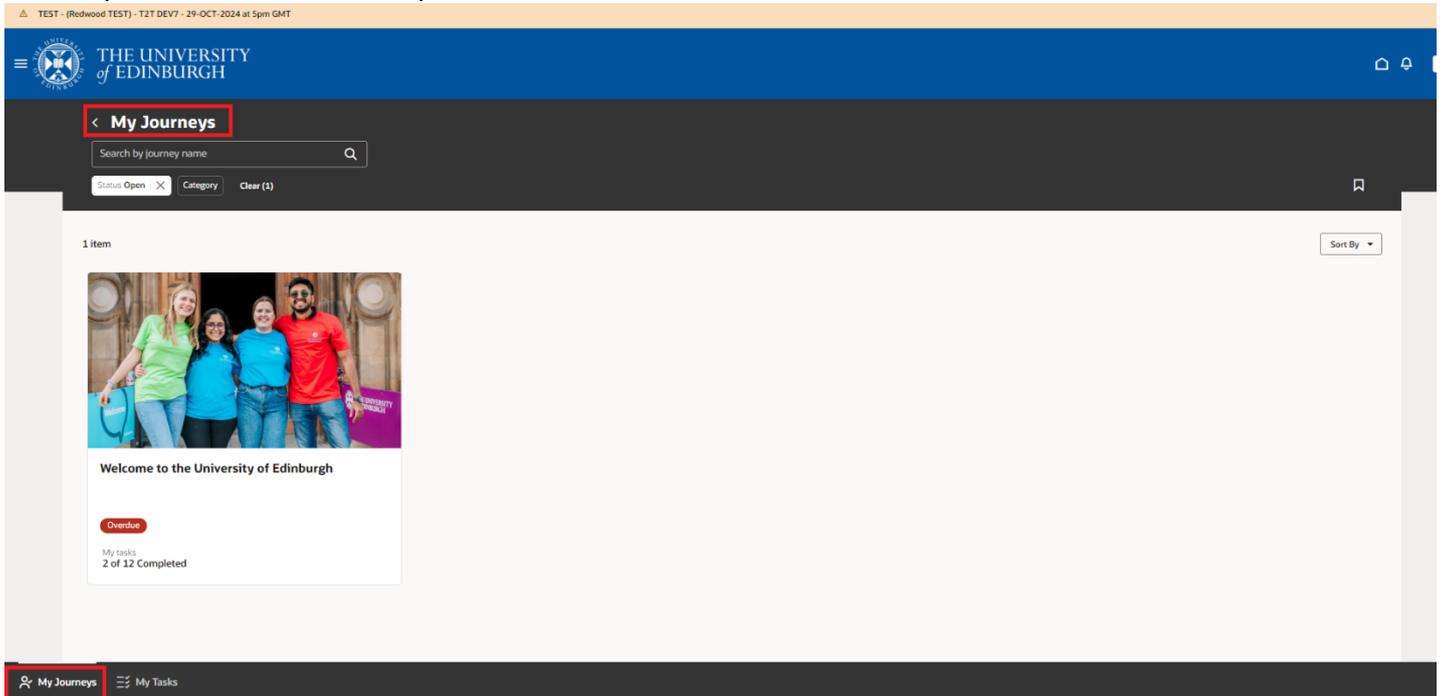
This section provides the detailed steps and includes relevant screenshots from the system.

Navigating Journeys

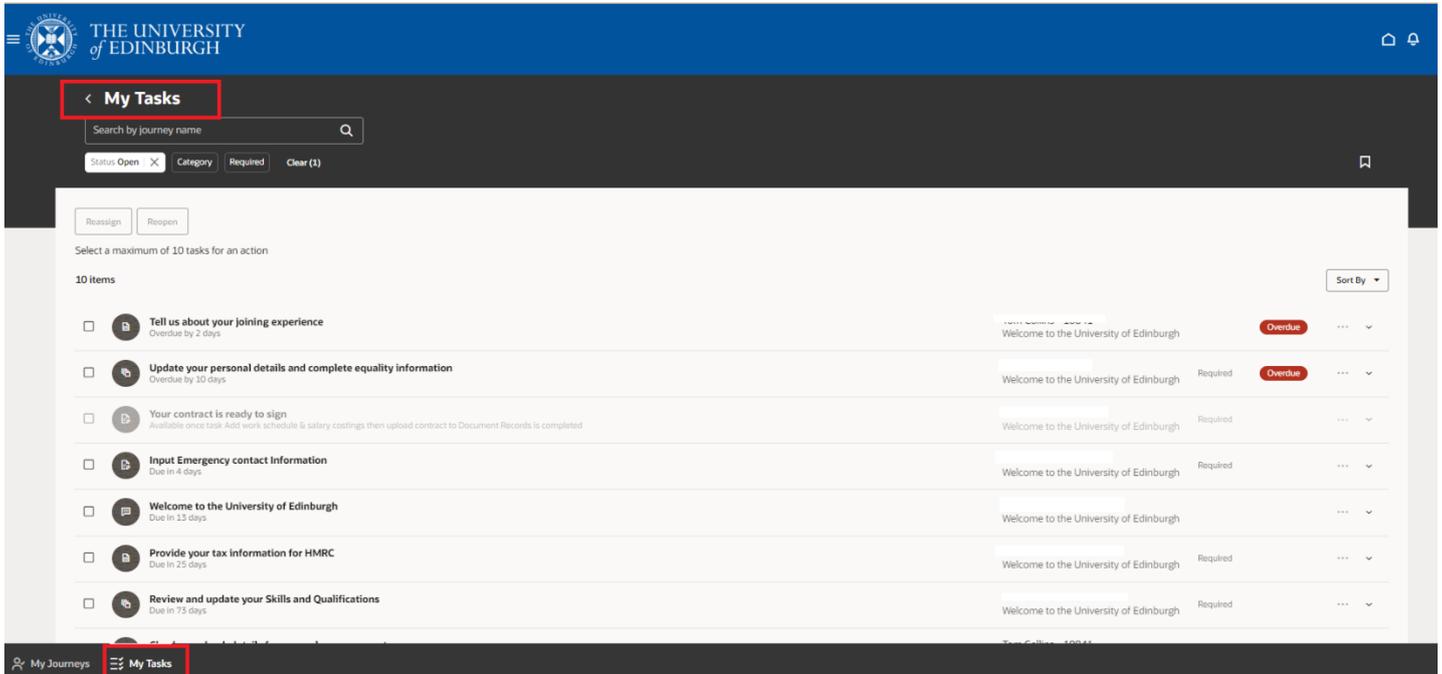
1. From the People and Money homepage select **Me**, then **Journeys**.



- Navigation within Journeys depends on the role you have within People and Money. As an Employee you will have access to:
 - My journeys** – This is where you can see Journeys assigned to you as a pending worker or employee, you can review and complete tasks from here.



- My Tasks** – This is where you can see the tasks in a list view that you need to complete

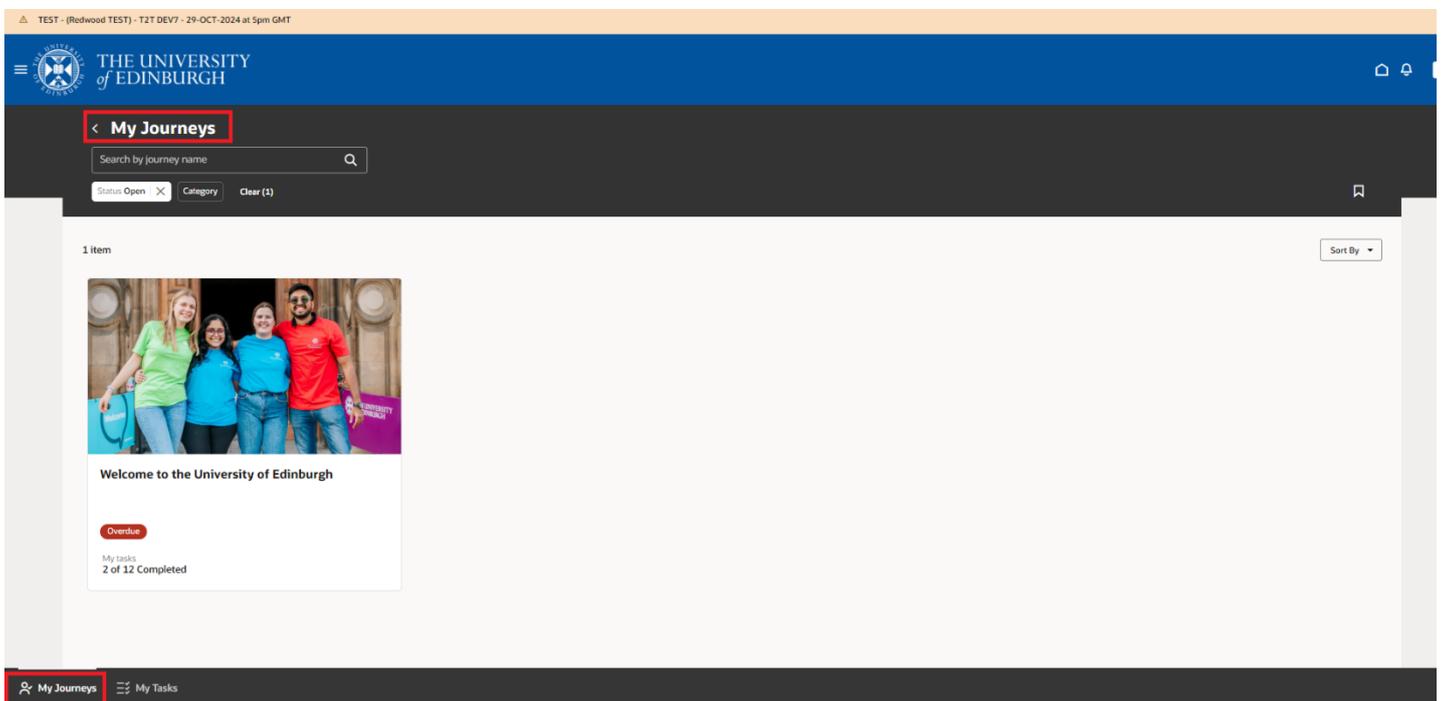


- Tips**
- Navigation to the different areas is at the bottom left of the screen.
 - You can use the **Search** and **Sort by** Functions on each of these pages to refine your search and display settings, these can also be bookmarked for future use.



My Journeys

1. From the People and Money homepage select **Me**, then **Journeys**. The default landing screen will be **My Journeys**. This screen will default to show you the open Journeys that have been assigned to you.



2. Click on the Journey you wish to view in more detail, this will display the Tasks you need to complete and the status of each.

Welcome to the University of Edinburgh



Tasks

Tasks completed 2 of 12

	Before Day 1 Welcome to the University of Edinburgh Due in 13 days		...
	Before Day 1 Getting Paid - Enter your bank details Completed on 12/12/2024	Required	...
	Before Day 1 Input Emergency contact Information Due in 4 days	Required	...
	Before Day 1 Your contract is ready to sign Available once task Add work schedule & salary costings then upload contract to Document Records is completed	Required	...
	Before Day 1 Apply for your staff card Completed on 10/12/2024	Required	...
	Day 1-90 Check your bank details for your salary are correct Overdue by 10 days	Required	Overdue ...
	Day 1-90 Provide your tax information for HMRC Due in 25 days	Required	...
	Day 1-90		...

3. Click on the task name to show the detail

Before Day 1
Welcome to the University of Edinburgh
Due in 13 days

Welcome message from the Principal and Vice-Chancellor



As the Principal and Vice-Chancellor of our wonderful university, I am delighted to be one of the first to welcome you to the University of Edinburgh. You are joining one of the world's great universities in one of the world's great cities. We're very proud of our history and of our contribution to the city, the region and to the wider world.

You'll be joining a community made up of more than 49,000 students and upwards of 16,000 staff. As a world-leading research-intensive university, we are here to address tomorrow's greatest challenges. Between now and 2030 we will do that with a values-led approach to teaching, research and innovation, and through the strength of our relationships, both locally and globally.

As set out in our Strategy 2030, our vision to deliver excellence is rooted in these values, with a focus on four key areas: people, research, teaching and learning, and social and civic responsibility – and we want you to play your part.

I am incredibly proud of the achievements of our community, and our ability to emerge stronger than ever. I have no doubt that the University of Edinburgh will continue to be a destination of choice for the most talented students and staff from all over the world.

With a final congratulations on your appointment, we are very pleased that you have joined us.

Professor Sir Peter Mathieson
Principal and Vice-Chancellor

	Before Day 1 Getting Paid - Enter your bank details Completed on 12/12/2024	Required	...
	Before Day 1 Input Emergency contact Information Due in 4 days	Required	...

My Tasks

This is an alternate list view of the **tasks you need to complete** as part of all journeys assigned to you.

1. From the People and Money homepage select **Me**, then **Journeys** then **My Tasks**

The screenshot displays the 'My Tasks' interface. At the top, there is a search bar labeled 'Search by journey name' and a filter section with 'Status Open', 'Category', 'Required', and 'Clear (1)'. Below this is a list of tasks, each with a checkbox, a task title, a description, a due date, and a status. The tasks are:

Task Title	Description	Due Date	Status
Here is your Certificate of Sponsorship (COS) number	Due in 50 days	Required	Open
Review and eSign terms of Interest Free Visa Loan	Available once task Here is your Certificate of Sponsorship (COS) number is completed	Required	Open
Submit your interest free visa loan application	Available once task Review and eSign terms of Interest Free Visa Loan is completed	Required	Open
Confirm when you have received your VISA and let us know the start date	Available once task Here is your Certificate of Sponsorship (COS) number is completed	Required	Open
Entering the UK and preparing for your arrival	Available once task Confirm when you have received your VISA and let us know the start date is completed	Required	Open
Sponsorship responsibilities during employment	Available once task Upload IFC of online right to work confirmation and checklist is completed	Required	Open
Check your bank details for your salary are correct	Overdue by 42 days	Required	Overdue
Provide your tax information for HMRC	Overdue by 6 days	Required	Overdue
Review and update your Skills and Qualifications	Due in 42 days	Required	Open
Settling in and making the most of your onboarding experience	Overdue by 20 days	Required	Overdue
Tell us about your joining experience	Overdue by 35 days	Required	Overdue

At the bottom left, there are navigation options for 'My Journeys' and 'My Tasks'.

2. The page will open with a default status of **Open**. Use the **Search** and **Sort by** Functions the page to refine your search and display settings, these can also be bookmarked for future use.

My Tasks

Search by journey name

Status Open Category Required Clear (1)

<input type="checkbox"/>	Here is your Certificate of Sponsorship (COS) number Due in 50 days	Tom Collins - 10841 Skilled worker - Certificate of Sponsorship	Required	...
<input type="checkbox"/>	Review and eSign terms of Interest Free Visa Loan Available once task Here is your Certificate of Sponsorship (COS) number is completed	Tom Collins - 10841 Skilled worker - Certificate of Sponsorship		...
<input type="checkbox"/>	Submit your interest free visa loan application Available once task Review and eSign terms of Interest Free Visa Loan is completed	Tom Collins - 10841 Skilled worker - Certificate of Sponsorship		...
<input type="checkbox"/>	Confirm when you have received your VISA and let us know the start date Available once task Here is your Certificate of Sponsorship (COS) number is completed	Tom Collins - 10841 Skilled worker - Certificate of Sponsorship	Required	...
<input type="checkbox"/>	Entering the UK and preparing for your arrival Available once task Confirm when you have received your VISA and let us know the start date is completed	Tom Collins - 10841 Skilled worker - Certificate of Sponsorship	Required	...
<input type="checkbox"/>	Sponsorship responsibilities during employment Available once task Upload PDP of online Right to Work confirmation and checklist is completed	Tom Collins - 10841 Skilled worker - Certificate of Sponsorship	Required	...
<input type="checkbox"/>	Check your bank details for your salary are correct Overdue by 43 days	Tom Collins - 10841 Welcome to the University of Edinburgh	Required	Overdue
<input type="checkbox"/>	Provide your tax information for HMRC Overdue by 6 days	Tom Collins - 10841 Welcome to the University of Edinburgh	Required	Overdue
<input type="checkbox"/>	Review and update your Skills and Qualifications Due in 42 days	Tom Collins - 10841 Welcome to the University of Edinburgh	Required	...
<input type="checkbox"/>	Settling in and making the most of your onboarding experience Overdue by 20 days	Tom Collins - 10841 Welcome to the University of Edinburgh		Overdue
<input type="checkbox"/>	Tell us about your joining experience Overdue by 33 days	Tom Collins - 10841 Welcome to the University of Edinburgh		Overdue

My Journeys **My Tasks**

3. Click on the task name to show the detail and to complete the steps within the task

Settling in and making the most of your onboarding experience
Overdue by 20 days

Tom Collins - 10841
Welcome to the University of Edinburgh

The University offers an inspiring and exciting place to work. By clicking the link below you can find information and support available to you as you start in your new role. This includes information about:

- New staff meet up sessions
- Getting around
- Getting online
- Getting paid
- Annual leave and other staff benefits
- Getting support
- Looking after your wellbeing
- Equality, Diversity and Inclusion

[Go to our induction website \(Opens in new browser\)](#)

Complete Task More Actions

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 My Journeys or My Tasks.
2. 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.
3. 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**

Before Day 1
Your contract is ready to sign
Completed on 24/01/2025

Required

- **Overdue Tasks are clearly marked**

Before Day 1
Getting Paid - Enter your bank details
Overdue by 34 days

Required **Overdue**

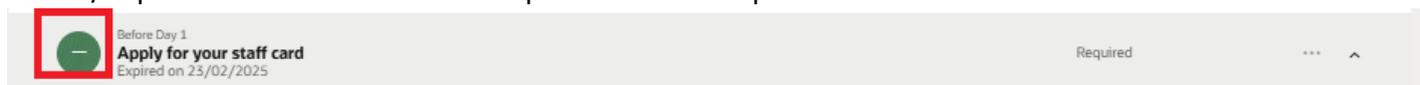
- If the **Complete Task** button is **greyed out** this means you haven't followed the steps within the task to enable completion. For example, it may require you to follow a link to complete additional details or read additional information or upload a document.



- If the **task** itself is greyed out this means that the task cannot be completed until a pre requisite task is completed or until the start date of the task is reached. You might see this with the 'Your contract is ready to sign' task initially.



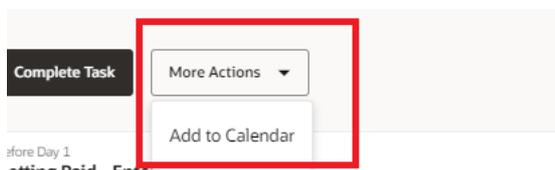
- **Expired Tasks** - If the task has expired it will be displayed as a green circle with a white line through it. The task should be reopened to be able to take action and complete, contact your line manager or school/department administrator to request them to reopen the task



- 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.

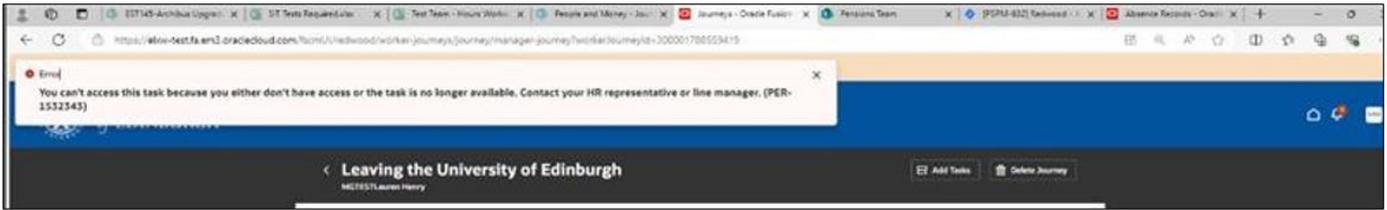


If the task is **greyed out** this means that the task cannot be completed until a prerequisite task is completed or until the start date of the task is reached



If you cannot access the task or links within

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



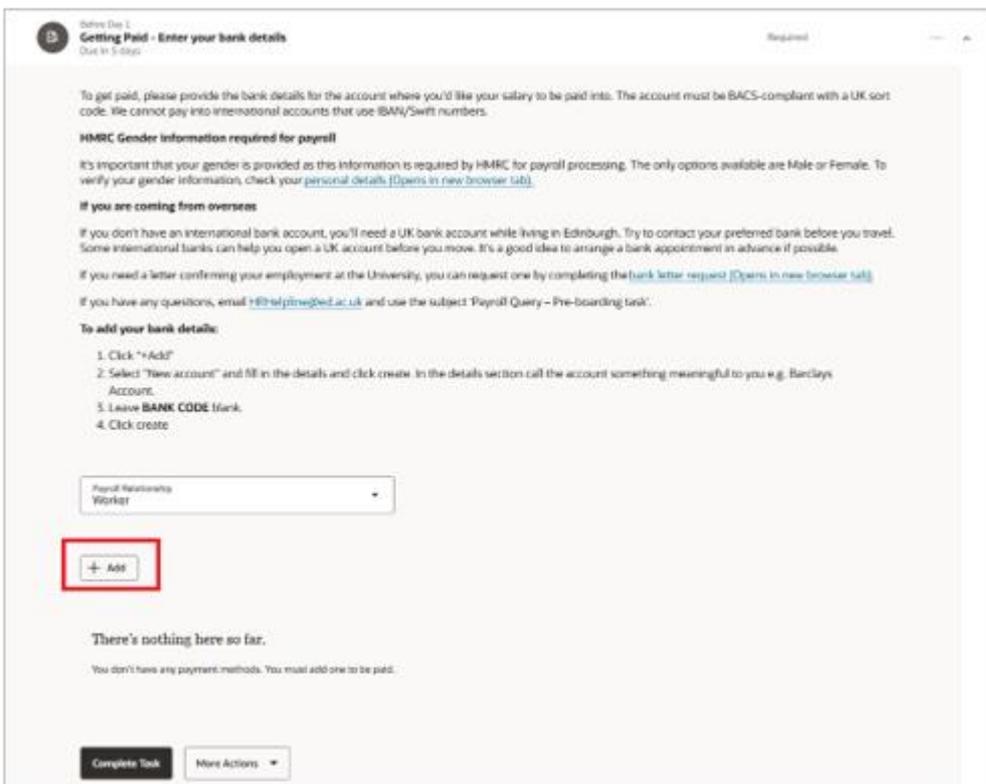
This is because the task has either expired or it is because you or the user is trying to access something that is intended for another user e.g. your line manager.

How to complete the Before Day 1 task 'Enter you Bank Details' (for new hires)

1. From the People and Money homepage select **Me**, then **Journeys**. The default landing screen will be **My Journeys**, then navigate to the **Getting Paid – Enter your bank details** task.



2. Follow the instructions on screen to enter your UK Bank Account details in which your salary will be paid. **Click +Add** to enter the bank details.



3. Complete the **required fields**:
 - If you are presented with a payroll relationship field, select the "Worker" option
 - Details - Add a recognisable name for your bank account
 - Payment Type – BACS

- Select **New Account** (existing account holds anything you might have held previously)
- Account Number
- Account Holder (name)
- Sort Code
- Bank Code – Can be ignored

Then click **Create**

New Payment Method

Details

What do you want to call this paymen... Required

Payment Type
BACS

Bank Details

Select an account

New Account Existing Account

Account Number Required

Account Holder

Bank Code

Sort Code

4. To **confirm** you have actioned this return to the task and select **Complete Task**



5. On day 1, you will receive a further task 'Check your bank details for your salary are correct' you should follow the instructions on screen and **then select complete task**.

A screenshot of a task card. At the top, it says 'Day 1-90' and 'Check your bank details for your salary are correct' with 'Overdue by 41 days' below it. On the right, there are labels 'Required' and 'Overdue' in a red pill, and a three-dot menu. The main text reads: 'To get paid, please check that the bank details you provided are still correct. If your bank details and payment method sections are correct just click "Complete Task".' Below this is a section 'To add a new account:' with two steps: '1. Click "+Add"' and '2. Select "New account" and fill in the details and click create. Leave BANK CODE blank.' Further down, there are paragraphs of text regarding BACS compliant accounts, payroll cutoffs, HMRC gender information, and overseas travel. At the bottom, there is a form for 'RBS' with a 'Warning BACS' label and an 'Account Number' field with an ellipsis. A 'Complete Task' button and a 'More Actions' dropdown are at the bottom of the form.

6. If you are **returning to the University**, you must check your bank details and complete this task following the steps above to make any amendments. Click on the ellipsis (three dots) to make any changes and to select a payment method if required

▲ The RBS payment method doesn't have an active bank account linked. Update the payment method to link an active bank account.

Warning BACS

RBS
831825
1/04/2018
100%

Account Number

...

How to complete the Day 1 Task 'Provide your Tax Information for HMRC' (for new hires and rehires)

1. From the People and Money homepage select **Me**, then **Journeys**. The default landing screen will be **My Journeys**, then navigate **to the task 'Provide your Tax Information for HMRC'**

Day 1-90
Provide your tax information for HMRC
Overdue by 6 days

Required **Overdue** ... ^

It's important to complete the new starter declaration on your first day to ensure you're on the correct tax code. If you have a P45 from your previous employer, you can upload that instead.

Failing to do this might result in being placed on an emergency tax code, meaning you could pay too much tax. If this happens, you'll need to contact HMRC directly as payroll cannot make adjustments. For more information, visit the [HMRC website \(Opens in new browser tab\)](#) or the [University of Edinburgh Tax webpage \(Opens in new browser tab\)](#).

To complete the New Starter Declaration form (this is recommended if you do not have a P45 on your first day with us):

1. Click the link to access and submit your New Starter Declaration Form.
2. Click "Complete Task" when done.

To upload your P45:

1. Upload the P45 by dragging the file into the "Drag and Drop" section
2. Click "Complete Task" to save it.

If you have any questions, raise a service request using category "Pay Enquiries – General."

[Complete New Starter Declaration \(Opens in new browser tab\)](#)

Drag and Drop
Select or drop files here.

Complete Task More Actions ▼

2. Follow the instructions on screen to complete the New Starter Declaration or upload a copy of your P45
3. Once you have uploaded your P45 or completed the new starter declaration then click **Complete Task**

Day 1-90
Provide your tax information for HMRC
Overdue by 6 days

Required **Overdue** ...

It's important to complete the new starter declaration on your first day to ensure you're on the correct tax code. If you have a P45 from your previous employer, you can upload that instead.

Failing to do this might result in being placed on an emergency tax code, meaning you could pay too much tax. If this happens, you'll need to contact HMRC directly as payroll cannot make adjustments. For more information, visit the [HMRC website \(Opens in new browser tab\)](#) or the [University of Edinburgh Tax webpage \(Opens in new browser tab\)](#).

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If you have any questions, raise a service request using category "Pay Enquiries – General."

[Complete New Starter Declaration \(Opens in new browser tab\)](#)

Drag and Drop
Select or drop files here.

Complete Task More Actions ▾

Tips

If the complete task button is greyed out check you have either uploaded your P45 or clicked on the link to complete your new starter declaration, this will only become available once you do this.

Please note you must complete this task by the 18th of the month in which you join. After this the task will be locked and cannot be completed.

If this happens please check your first payslip. There is guidance to help you within the [How to view your online Payslip](#) guide (under the heading Finance>Payroll).

If you have any questions about your tax code, please contact payroll by raising a Service Request using the category Pay Enquiries – General and also read the information on the [Tax Matters](#) webpage.

Journeys you might see once you are an employee

During your employment with the University, you may be assigned a journey if you are moving roles, taking on an additional assignment or leaving. The navigation and ways of reviewing and completing tasks will be the same and should be completed in a timely manner.

Journey Name	Purpose	
Getting Started in a new role	Supports employees that are transferring, taking on an additional assignment or moving to an Internal Secondment.	 <p>Getting started in a new role Tasks to complete for an employee moving to a new role in the University of Edinburgh</p> <p>Cross Boarding</p>
Moving Roles – Tasks to complete in your current role Journey	When an employee is leaving their current role and transferring or starting an internal secondment.	 <p>Moving roles: Tasks to complete in your current role Tasks to complete for an employee moving to a new role in UOE</p> <p>Cross Boarding</p>
End of Assignment but continuing at the University	When an employee leaves one of their assignments but is continuing employment at the University.	 <p>End of assignment but continuing at the University Tasks for staff ending an assignment but continuing to work at the University</p> <p>Off Boarding</p>
Leaving the University of Edinburgh	Supports you if you leave the University.	 <p>Leaving the University of Edinburgh Journey allocated to staff leaving the University of Edinburgh</p> <p>Off Boarding</p>

Version History

Version	Date	Description	Approved By
0.1	N/A	Draft	
1.0	24/03/2025	First version for publication	ME
2.0	23/2/26	Updated information on implications of not completing the 'Provide your tax information for HMRC' task	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.