THE UNIVERSITY of EDINBURGH

System User Guide

Line Manager – Guide to Journeys

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Contents

Introduction

This guide covers key tasks for Line Managers to support the starter, 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). Line Managers can access tasks for their direct reports.

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 Journeys 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 Team Journeys or My Tasks.

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.

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.

If you are an SDA with Line Manager responsibilities, you should also refer to the SDA Guide to Journeys as you will have additional access for your AOR.

Navigation within Journeys

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

<table>
<tr><th></th><th colspan="6">Journey Navigation</th></tr>
<tr><th>Role</th><th>Explore</th><th>My Journeys</th><th>My Tasks</th><th>Team Journeys</th><th>Organization Journeys</th><th>Activity</th></tr>
<tr><td>Pending workers and workers</td><td>No</td><td>Yes</td><td>Yes</td><td>No</td><td>No</td><td>No</td></tr>
<tr><td>School/Dept Admin</td><td>Yes</td><td rowspan="4">Only if allocated a journey as a Pending Worker or Employee</td><td>Yes</td><td>No</td><td>Yes, but is restricted to AOR</td><td>No</td></tr>
<tr><td>HR role (except HR Systems)</td><td>Yes</td><td>Yes</td><td>No</td><td>Yes - All journeys</td><td>No</td></tr>
<tr><td>Line Managers</td><td>Yes</td><td>Yes</td><td>Yes</td><td>No</td><td>No</td></tr>
<tr><td>HR Systems</td><td>Yes</td><td>Yes</td><td>No</td><td>Yes - All journeys</td><td>Yes</td></tr>
</table>

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
Onboarding Journeys	
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 rejoining 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).
Offboarding Journeys	
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, with details of 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.

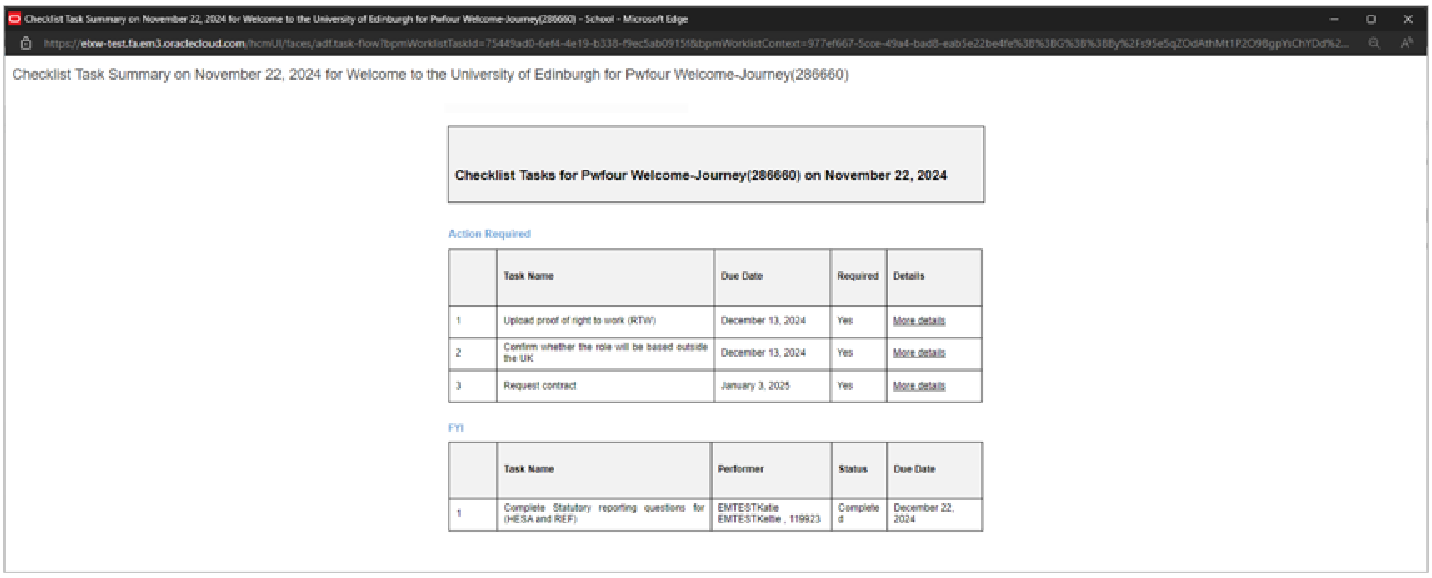
Actions – what you can and cannot do at a Journey or task level

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

	Pending Worker/ Employee	**HR Services**	**SDA**	**Line Manager**
Access **all** 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)

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	More details
2	Confirm whether the role will be based outside the UK	December 13, 2024	Yes	More details
3	Request contract	January 3, 2025	Yes	More details

FYI

	Task Name	Performer	Status	Due Date
1	Complete Statutory reporting questions for (HESA and REF)	EMTESTKatie EMTESTKellie , 119923	Completed	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.

Task Duration and Expiry Dates

Within Journeys tasks are configured with a Target Duration (Due Date) and a Task Expiration Date, both dates are based on when the Journey was assigned in the majority of cases.

The Target Duration (Due Date) is visible to users in Journeys and whilst this date is usually a shorter timeframe it can be actioned even if showing as overdue. Once the expiration date is reached the task becomes inactive and if action is still required should be reopened. Expiry dates cannot be seen by users. Journeys have been designed this way to avoid tasks and subsequently journeys remaining open. Due dates are not calculated based on personal or job-related situations, like someone leaving the University.

If a Journey was assigned some time ago, and the pending worker or employee has not actioned the tasks in a timely way this may lead to them showing as overdue or even expiring. Particularly for the Welcome to the University or Rejoining the University Journeys it is important that pending workers action their onboarding tasks when they are assigned the Journey, not when they reach their start date or in the case of Guaranteed Hours staff when they first come to claim for hours worked, this will help prevent any potential problems with their first salary payment.

In Brief

This section is a **simple overview** and should be used as a reminder. More detailed information, screenshots and tips is provided within the 'In Detail' section.

Navigating Journeys

1. From the People and Money homepage select **My Team**, 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).
    - **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.**

Team Journeys

1. From the People and Money homepage select **My Team**, then **Journeys.** The default landing screen will be **Team Journeys.**
2. This screen will show the Journeys for your direct reports and the number of tasks that are completed for you and the employee. Use the filters at the top of the page to search or to sort the order that the Team Journeys are displayed.
3. Click on the person you wish to view in more detail.

My Tasks

1. From the People and Money homepage select **My Team**, then **Journeys.** Navigate to **My Tasks**, this screen will show the list tasks you need to complete for your team.
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 Team Journeys or My Tasks. As a Line Manager your default view will be via **Team 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.**

Housekeeping of legacy checklists and tasks

1. Please follow the steps in the [Line Manager 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 Team**, then **Journeys.** The default landing screen will be **Team 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. For example, a Line Manager can send a reminder to the worker to complete their bank details but cannot reassign that task.
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).

Assigning a Journey manually

1. In People and Money, go to **My Team, then Journeys** and navigate to **Explore** and search for the Journey.
2. Click on the Journey Name to review the details and select **Assign**.
3. Complete when to assign date and select the person (type the name).
4. Check the details then click **Assign,** then navigate to Team 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 Team**, then **Journeys.** The default landing screen will be **Team Journeys.** 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.
2. Select the person, then Add Tasks.
3. 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**
4. Once you have added what you need click **Add to Journey.** Check the task(s) appear in the Journey you have added them to.

Completing the Request Contract Task

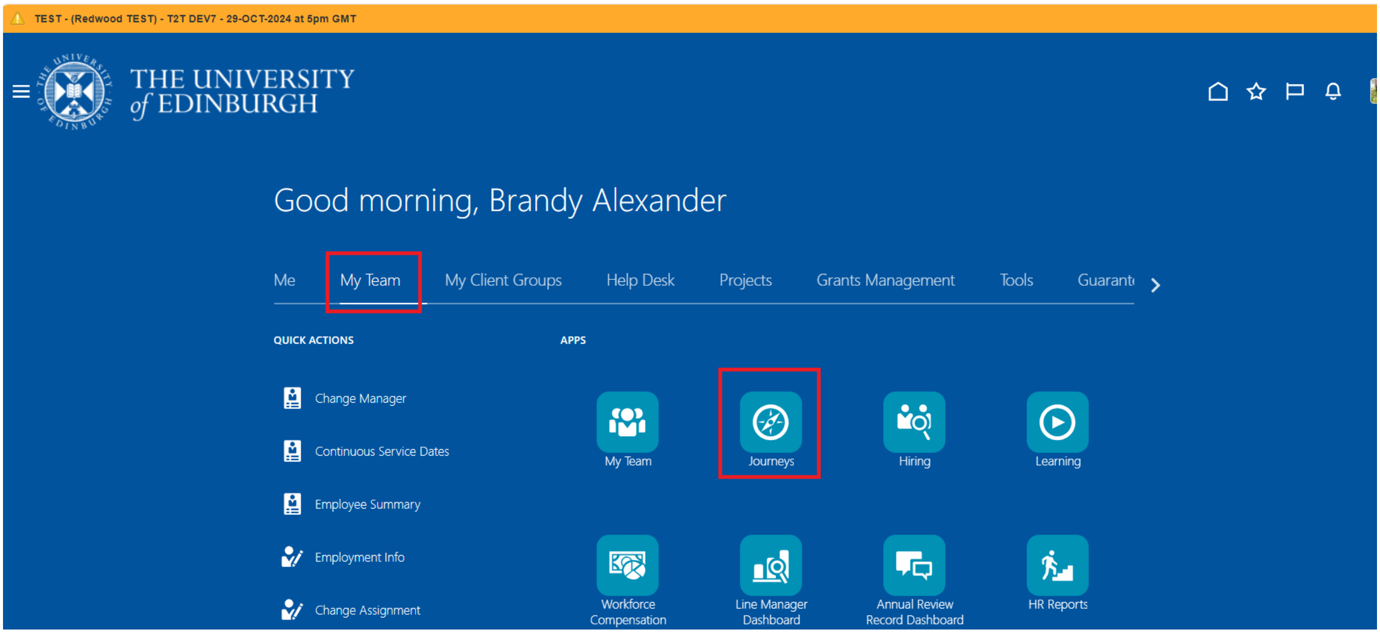
1. From the People and Money homepage select **My Team**, then **Journeys**. The default landing screen will be **Team Journeys.**
2. Click on the person you wish to view in more detail and find the Request Contract task, if this is not listed under My tasks you might find this under Others' tasks.
3. Click on the **name of the task** to expand the task description and then complete all 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.

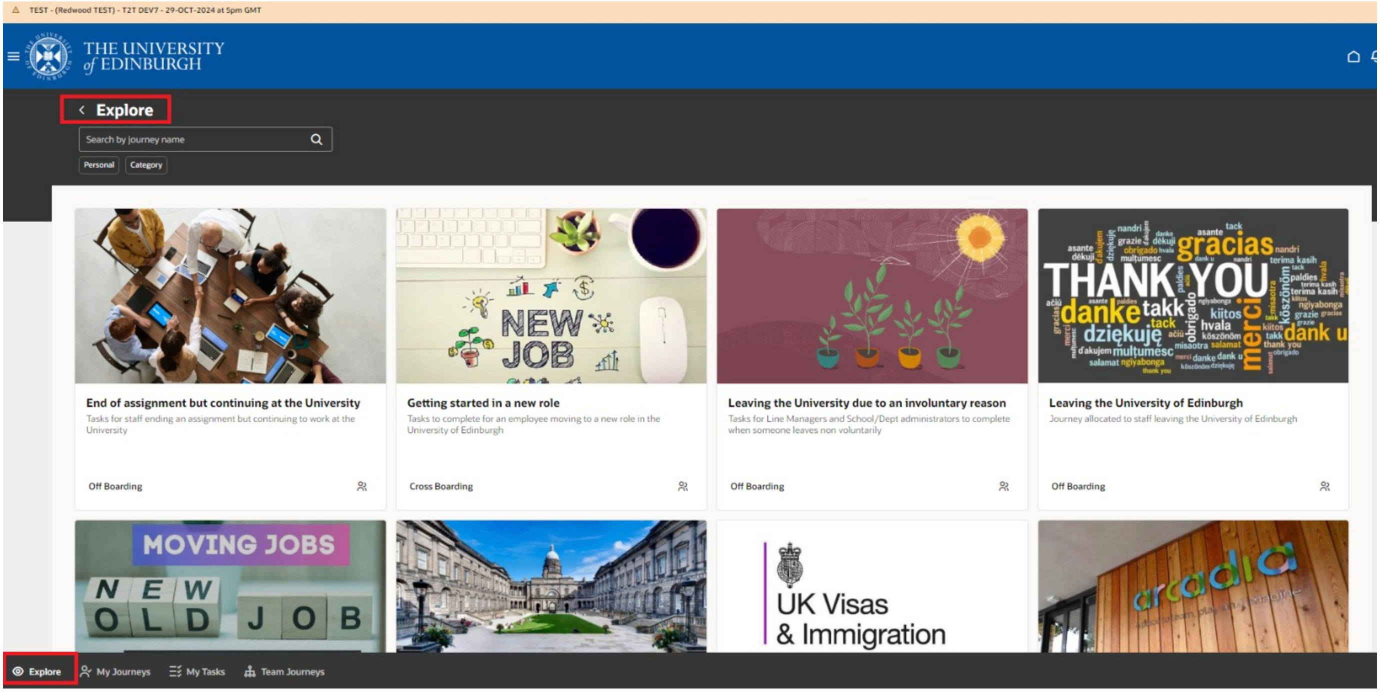
Navigating Journeys

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

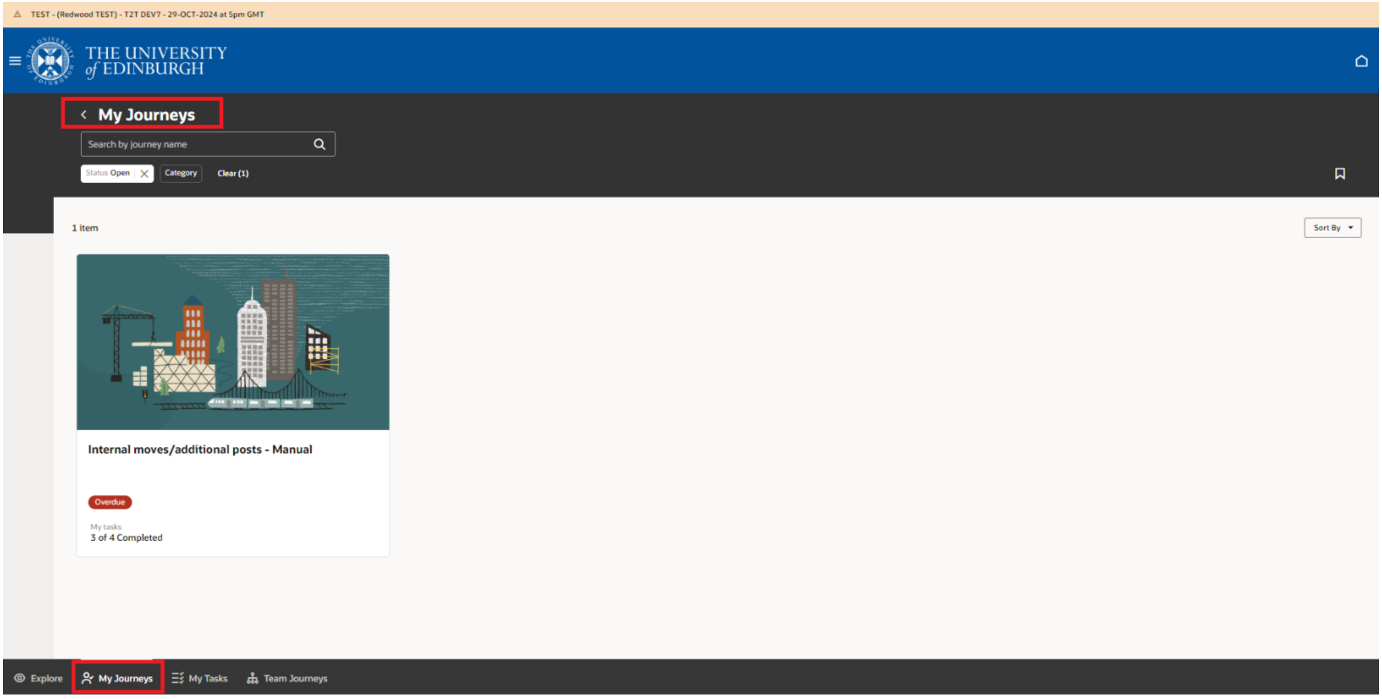


Navigation within Journeys depends on the role you have within People and Money. As a Line Manager you will have access to:

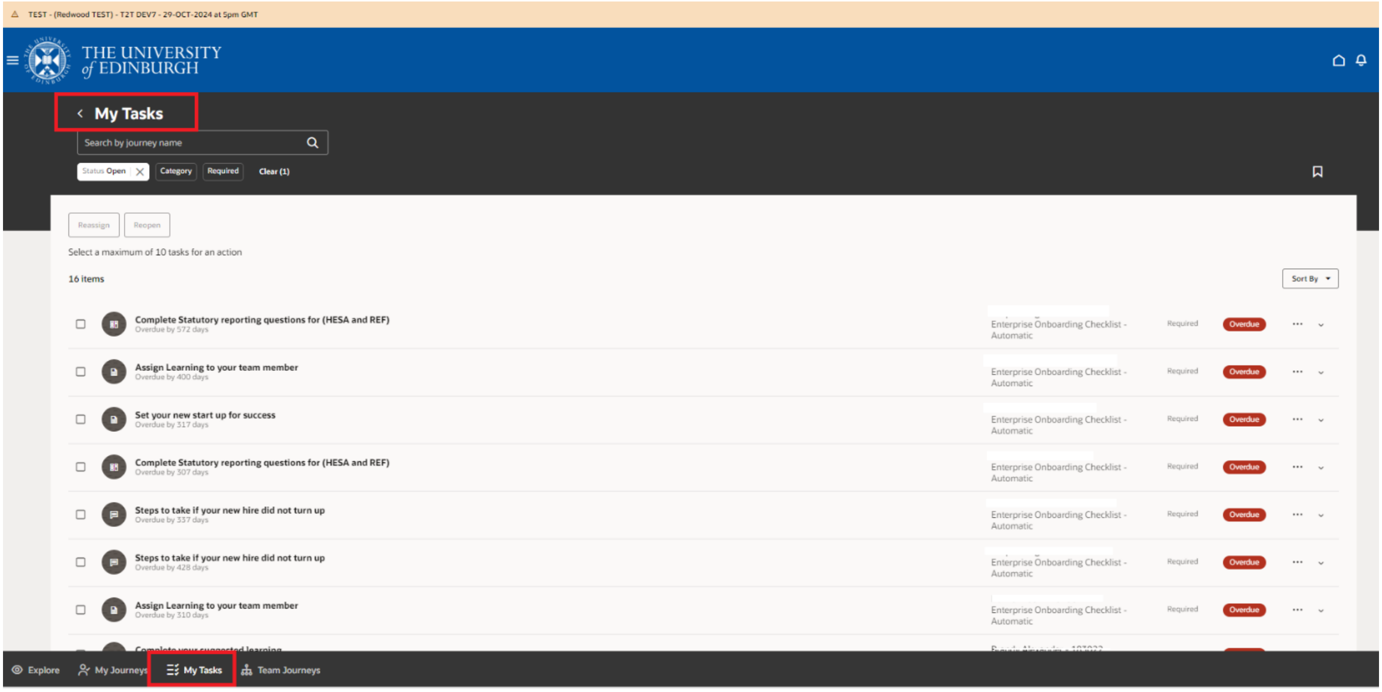
- **Explore** – This is the Journey library where you can view all Journeys available in People and Money and assign these to members of your team.



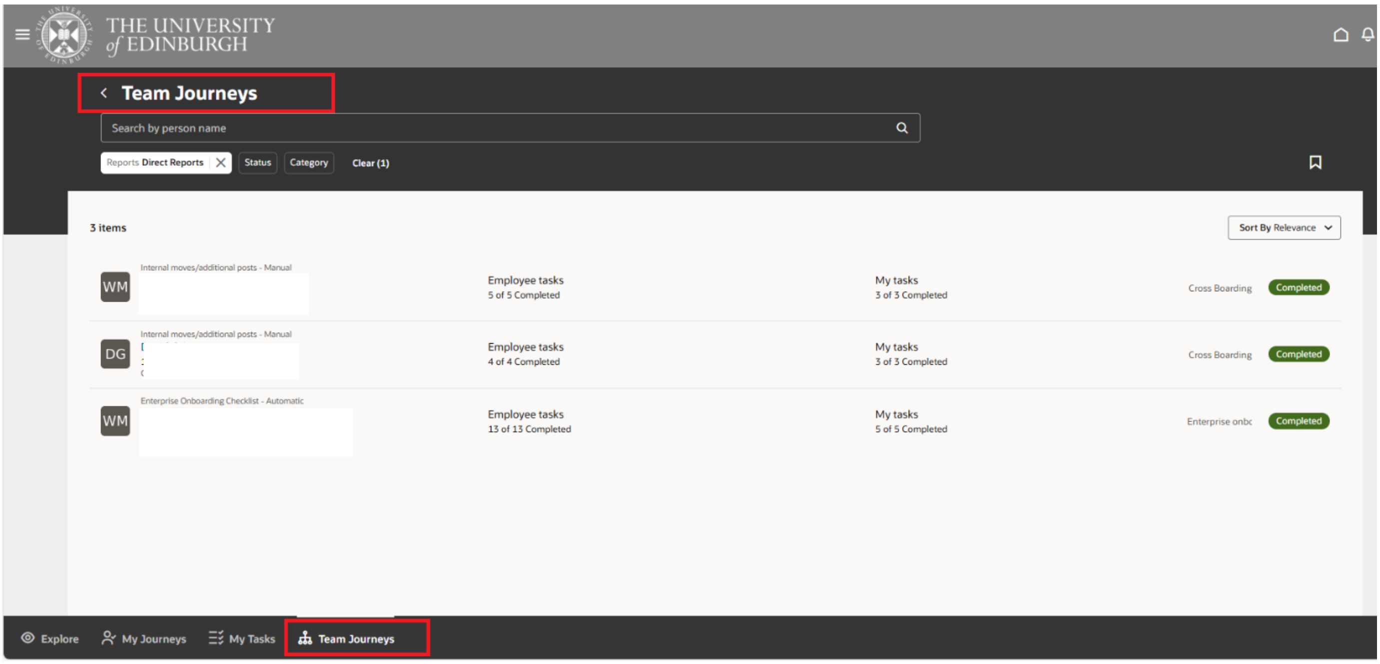
- **My Journeys** – This is where you can see Journeys **assigned to you** as a pending worker or employee.



- **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).



- **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.**



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 (see below screen shot).
- When a worker is terminated, the line manager's relationship with that worker is end-

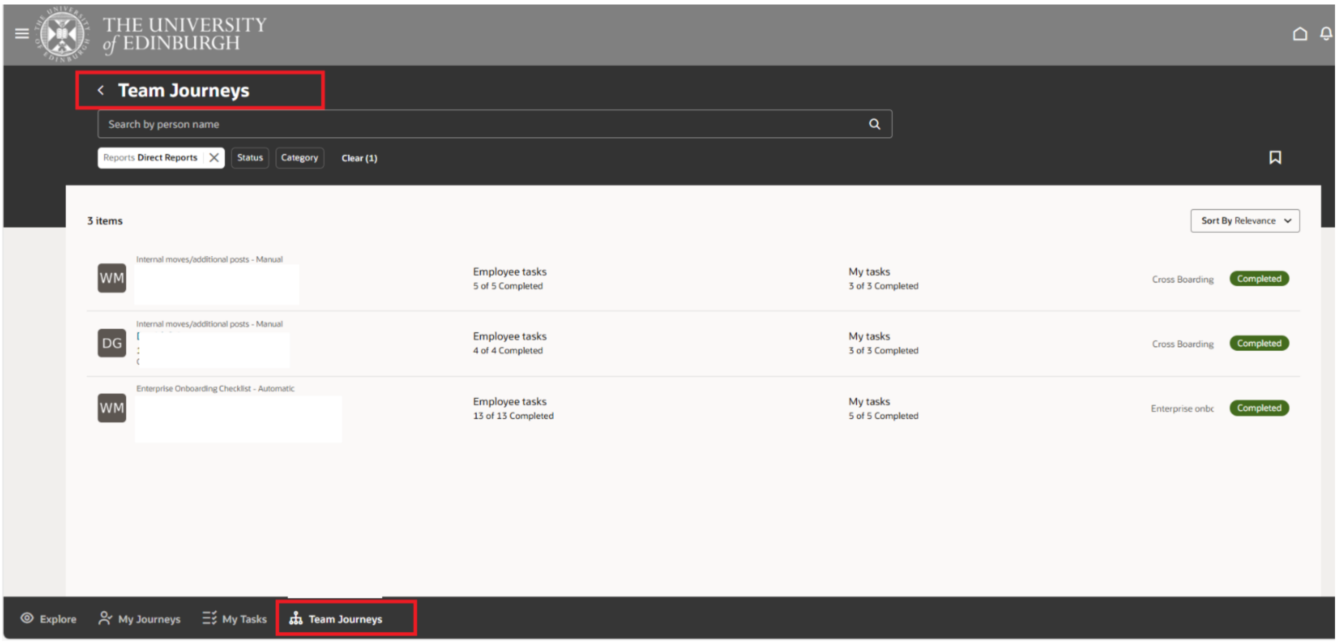
dated, as of the termination date. Therefore, post the termination date, you **cannot** view the terminated workers journey in the Team Journeys tab. You will however still be able to see and complete allocated tasks for that worker in the My Tasks tab.

- If the termination is backdated, 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.

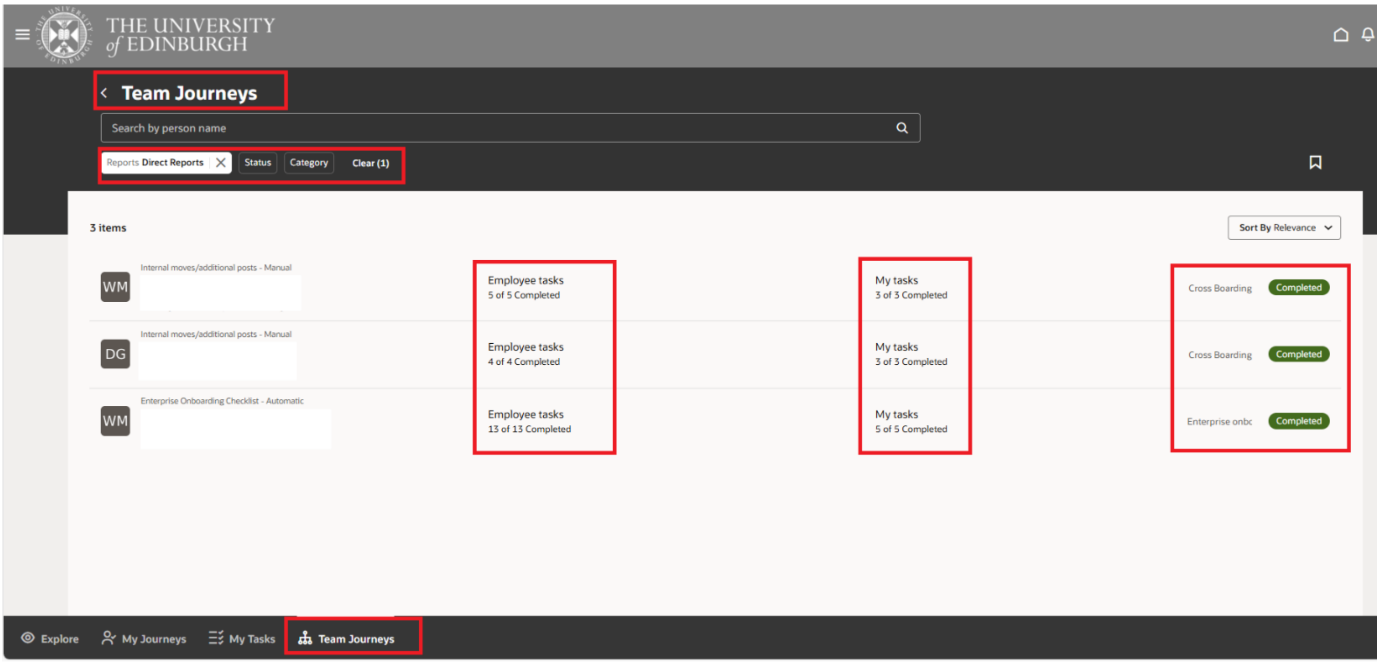
Team Journeys

Follow the steps below to review the tasks for you or your team.

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

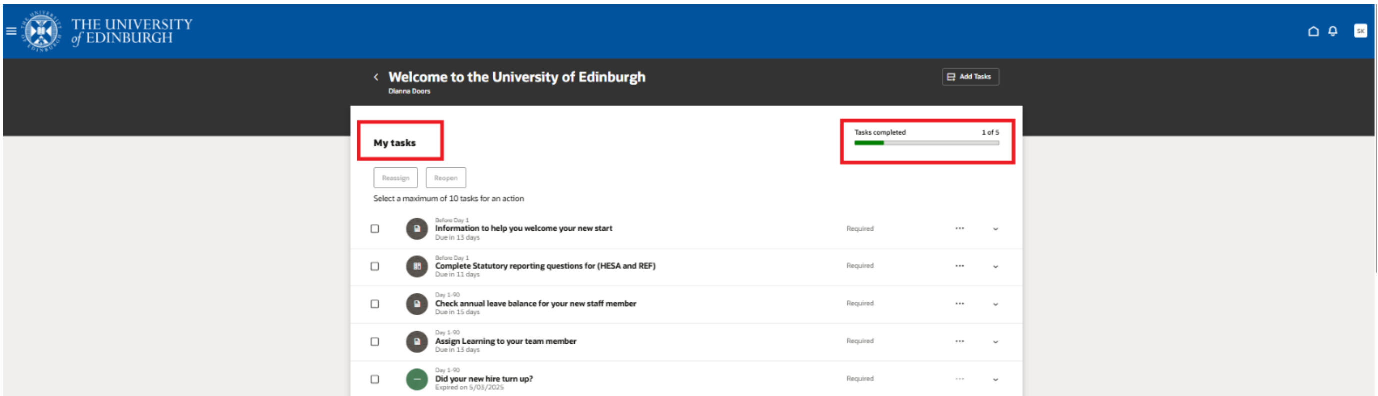


2. This screen will show the Journeys for your direct reports and the number of tasks that are completed for you and the employee. Use the filters at the top of the page to search or to sort the order that the Team Journeys are displayed. Use the Status Filter to select Open Journeys.

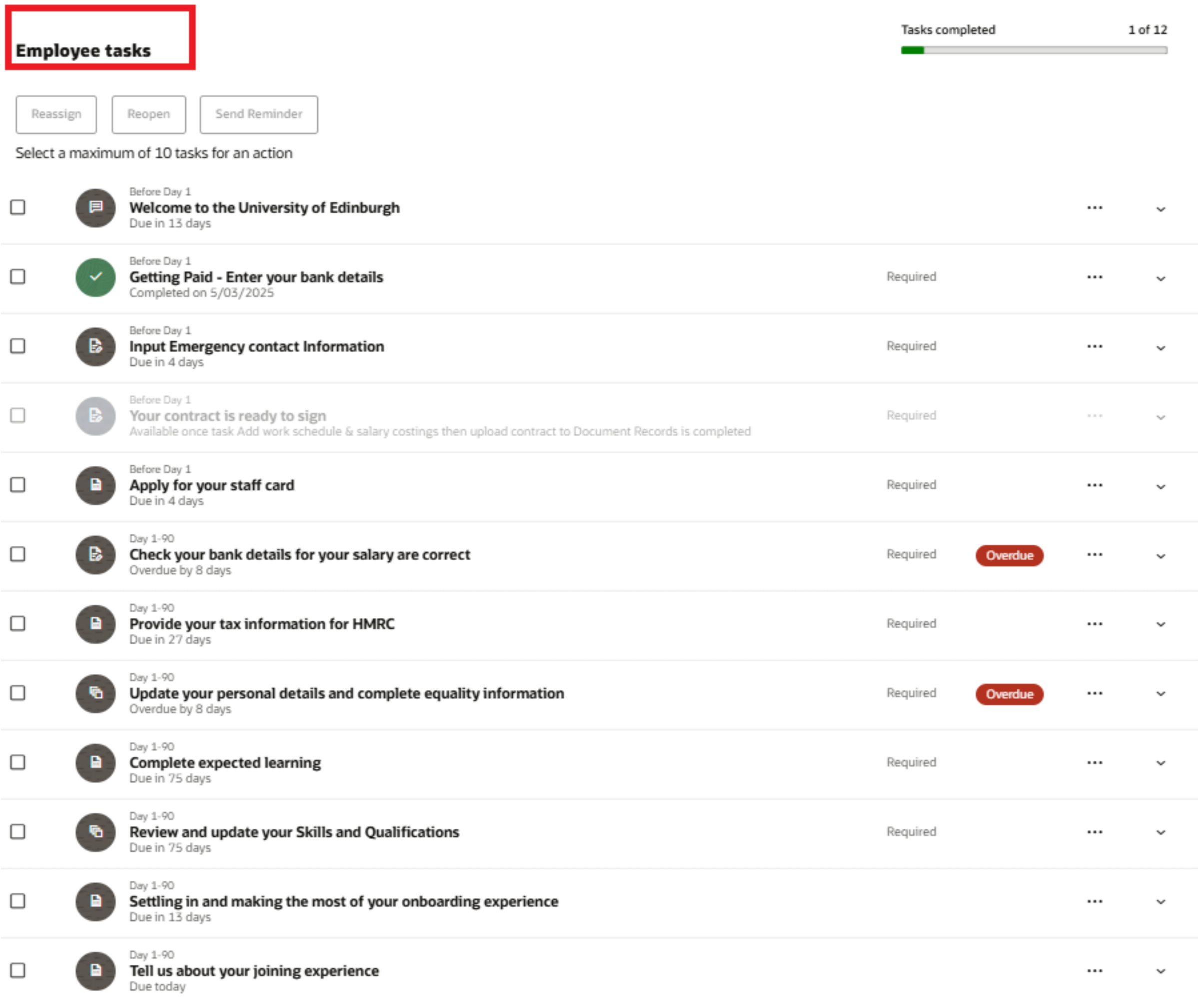


3. Click on the person you wish to view in more detail. The screen will be in three sections which clearly show the status of the tasks.

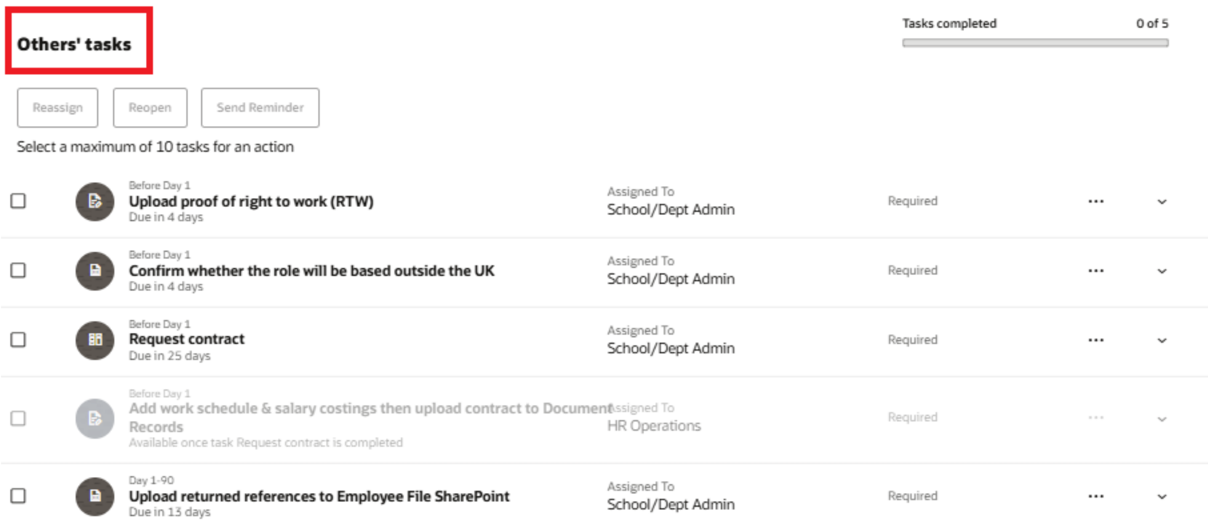
My tasks (tasks you need to perform)



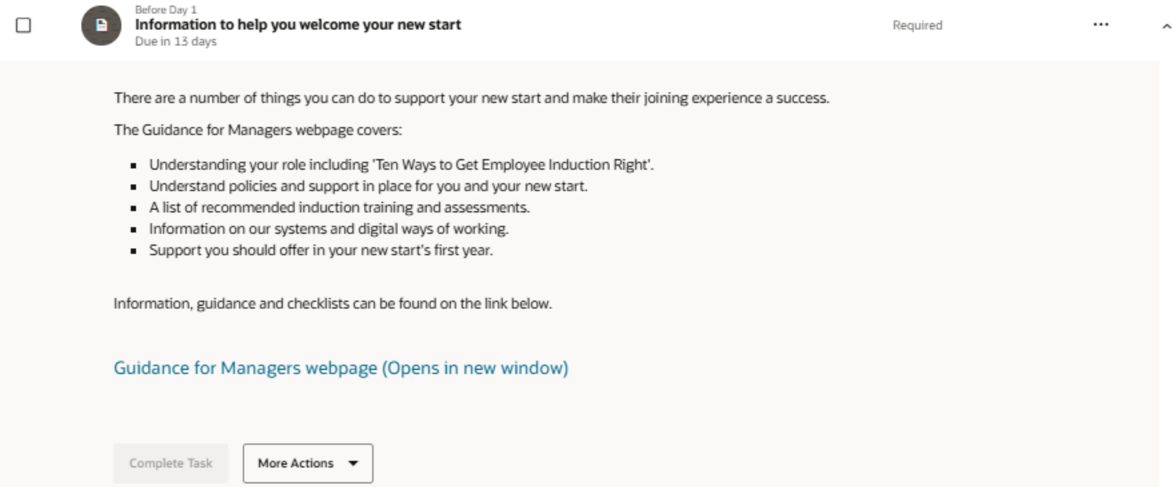
Employee tasks (tasks the worker needs to complete)



Others' tasks (SDA or HR Tasks)



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

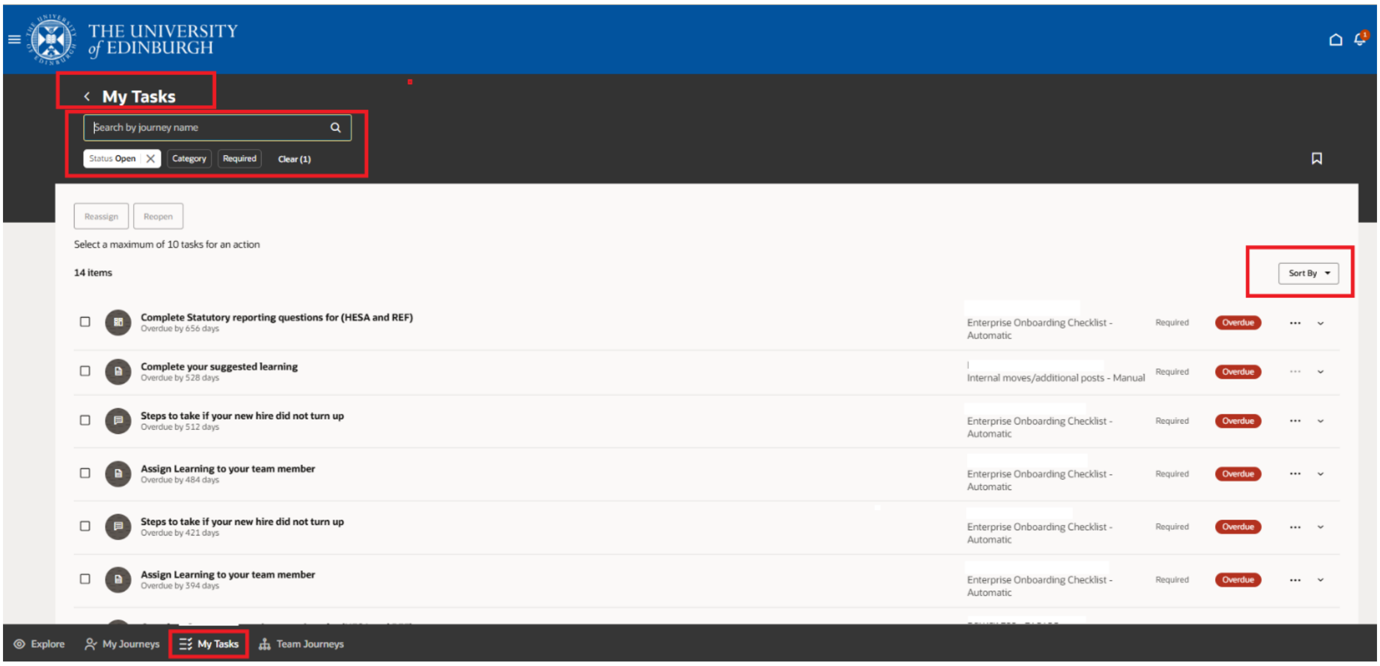


5. If you prefer you can navigate to **My Tasks** to view and complete tasks.

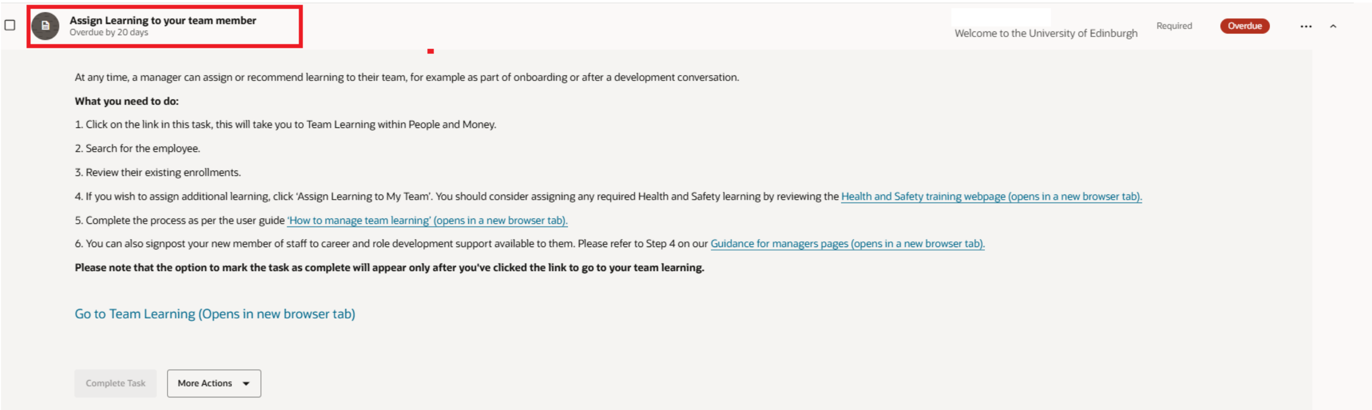
My Tasks

This is an alternative way to view tasks assigned to you for your team.

1. From the People and Money homepage select **My Team**, then **Journeys.** The default landing screen will be Team Journeys**.** Navigate to **My Tasks**, this screen will show the list tasks you need to complete for your team
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.



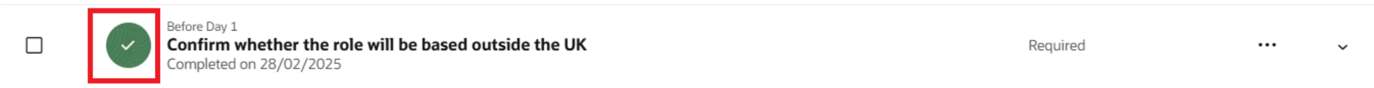
Reviewing and Completing Tasks

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 Team Journeys or My Tasks. As a Line Manager your default view will be via **Team 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

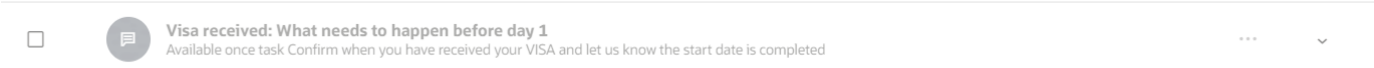
Tasks with a green tick indicate they have been completed



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. a Line Manager 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.

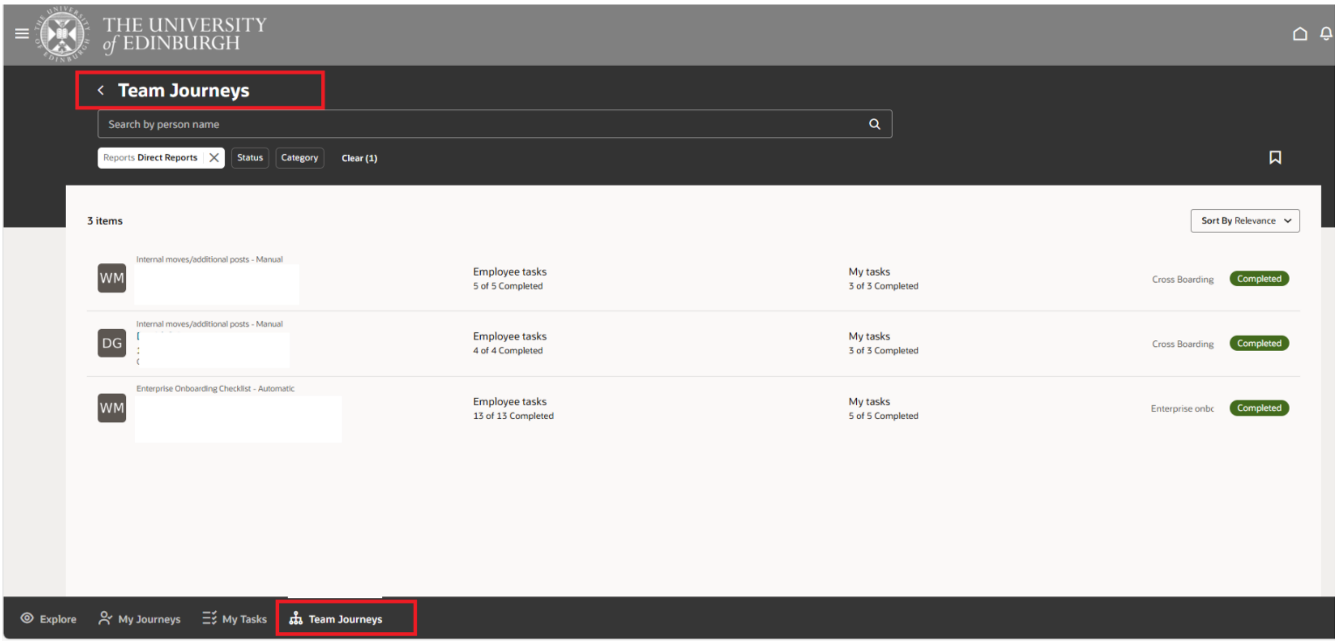
Housekeeping of legacy checklists and tasks

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 [Line Manager 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 Team Journeys but apply equally to My Tasks.

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

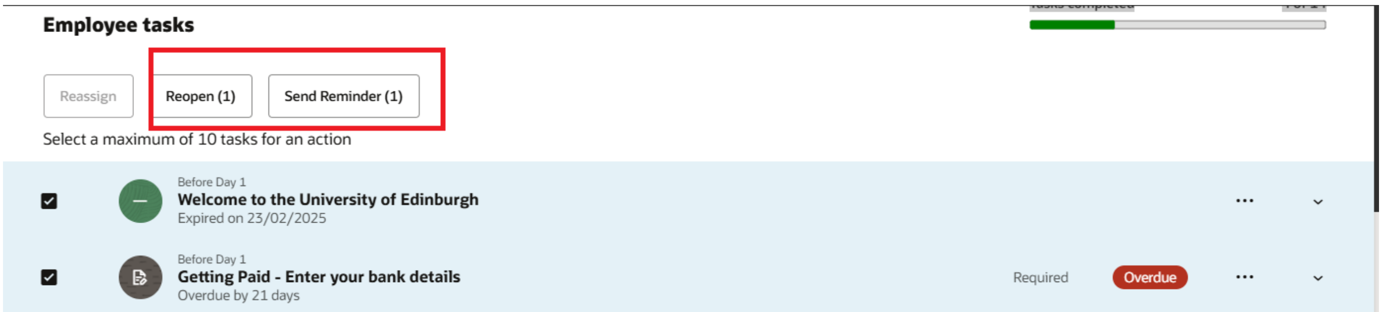
3. Click on the ellipsis at the right-hand side of the task to expand the actions you can take, the action available will depend on the task and its status. For example, a Line Manager can send a reminder to the worker to complete their bank details but cannot reassign that task.

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
- **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.

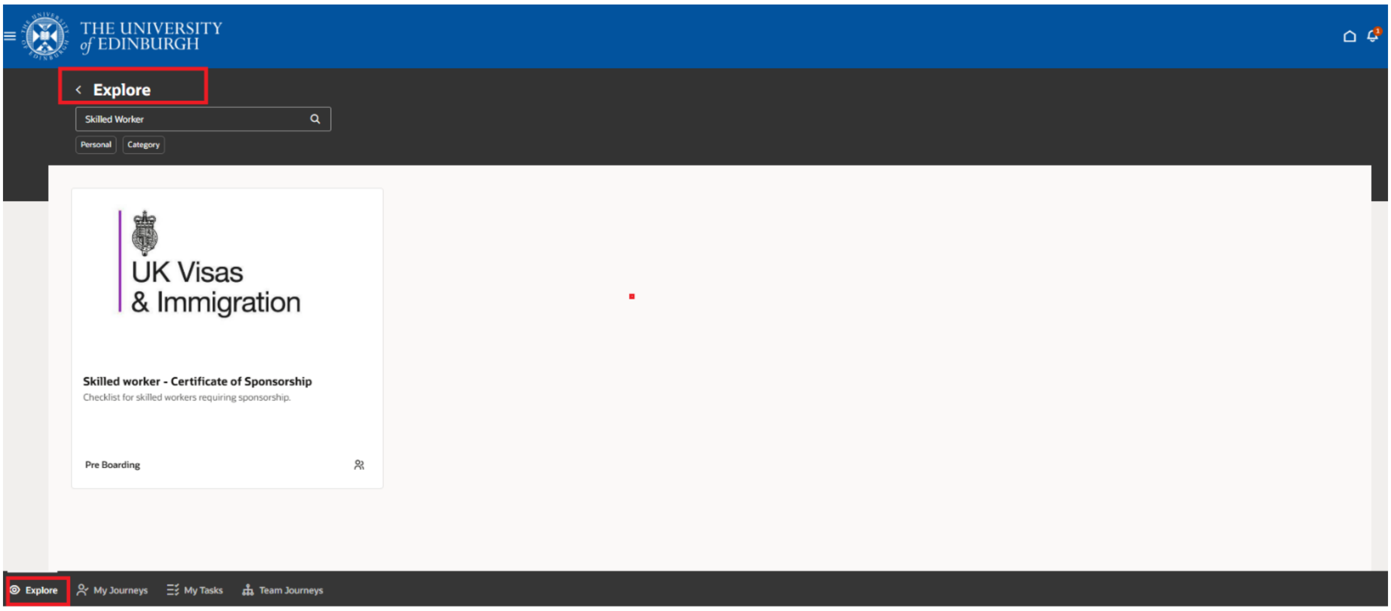
Assigning a Journey manually

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

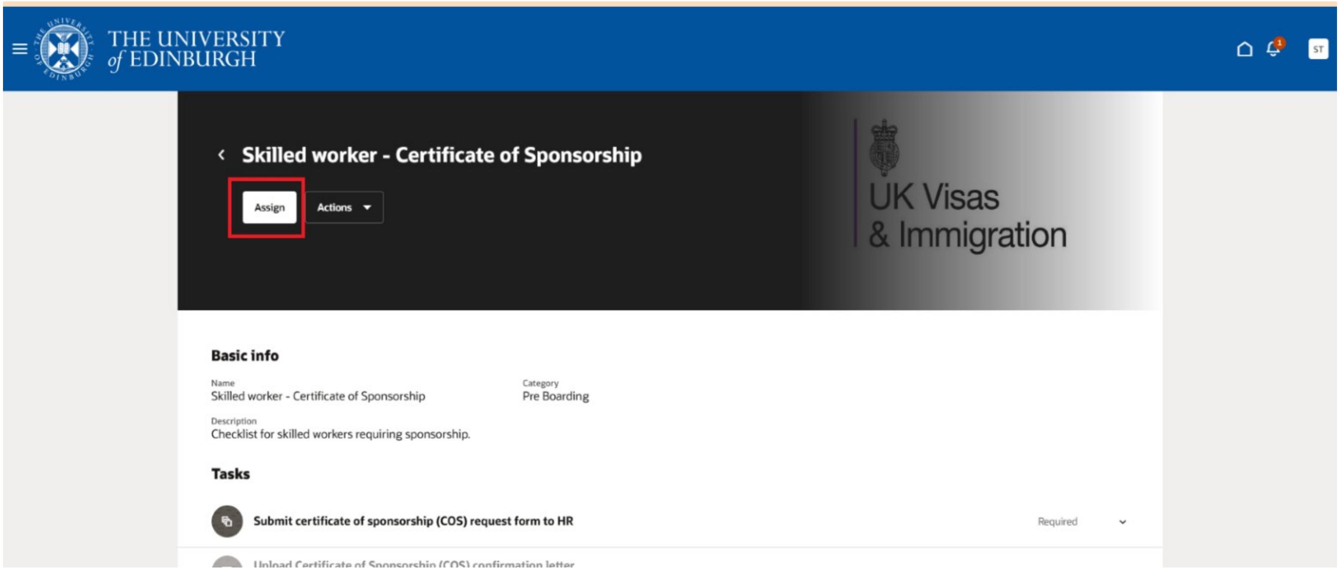
- **Skilled Worker – Certificate of Sponsorship** – A journey to support the process for applying for a Skilled Worker Visa for new out of country skilled workers. **This should be assigned by the School or Department/Line Manager once the pending worker record has been created.** Further details on 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:

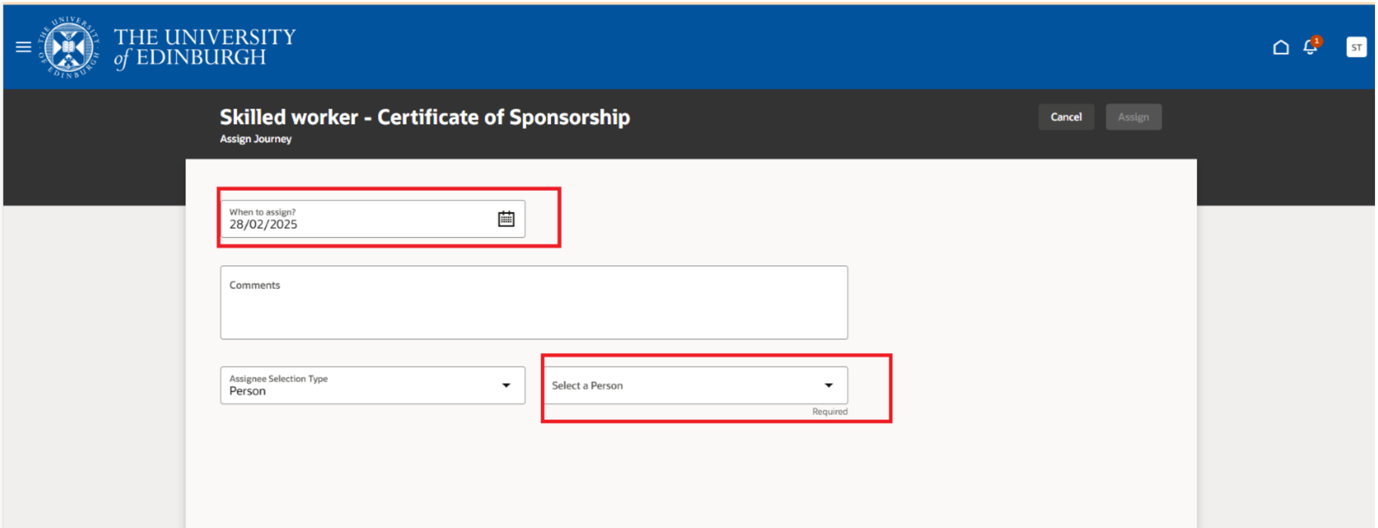
1. In People and Money, go to **My Team, then Journeys** and navigate to **Explore** and search for the Journey.



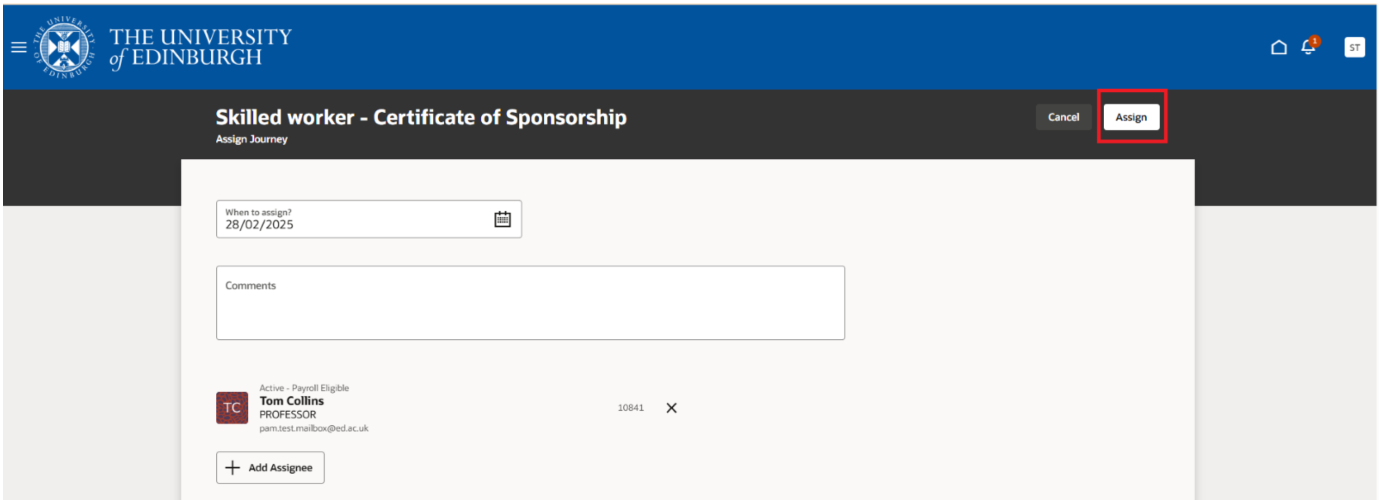
2. Click on the Journey Name to review the details and select **Assign**.



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



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



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. Take care when assigning that you have chosen the correct person.

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.**

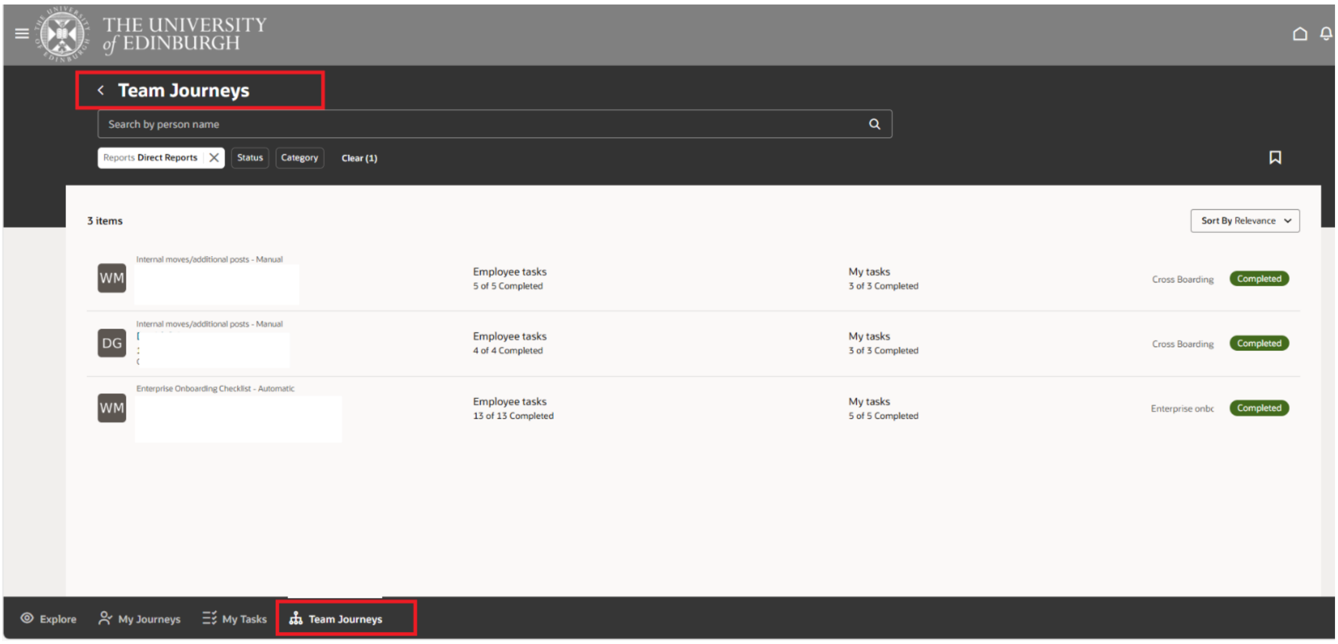
The following tasks are to supplement the standard Journeys configured in People and Money and should be manually added as per the table and process below.

Task Name	Category	Description
Complete Key Job Hazards Evaluation	Health and Safety	**Line Managers or SDAs** should assign these tasks for anyone joining or moving into a role that requires 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 • Swimming pool maintenance staff. Further information is available from the Health and Safety webpages.
Confirm that health and safety measures are in place	Health and Safety	
Upload a copy of your most recent payslip along with a signed and dated CV	NHS	**Line Managers or SDAs should assign this task.** 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. Further information is available from the NHS Honorary Cover webpage.
Upload your confirmation letter of professional indemnity insurance (Doctors/Dentists)	NHS	For information only **– these tasks will be assigned by HR Operations** as required for roles that require NHS honorary cover. Further information is available from the NHS Honorary Cover webpage.

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 Team**, then **Journeys.** The default landing screen will be **Team Journeys.**

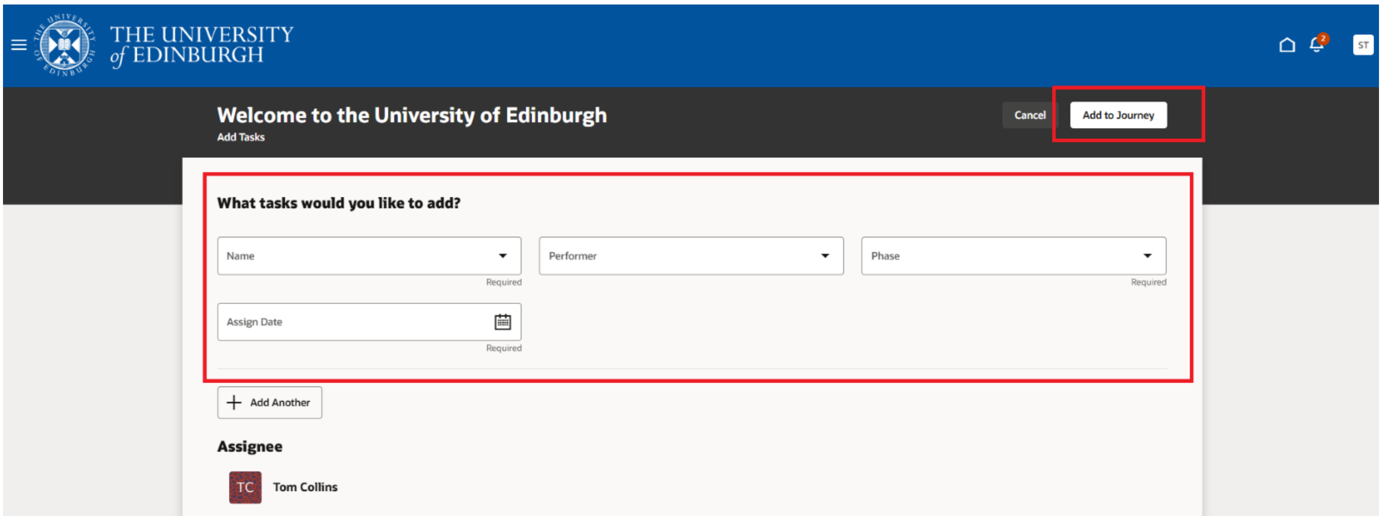


2. Search for or select the person you wish to assign the task(s) to, you should select the Journey most relevant to the tasks, this will likely be the Welcome to the University, Rejoining the University or Getting started in a new role.

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**

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



An additional task titled Upload proof of Right to Work is available for use in specific scenarios where someone is transferring or taking on an additional post and requires a Right to Work Check. HR Operations will advise if and when this should be used.

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 rejoining the University, the Journey becomes active once the rehire has taken place. The Journey contains preboarding (before day 1)	Automatic	Pending Worker Line Manager SDA HR Operations

	and onboarding tasks (day 1-90).		
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 Tasks

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 you, check Team 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
Advertised Post via People and Money	Please **contact the current Line Manager/SDA** to reassign the tasks using the email template. If the employee moving holds multiple assignments you will need to contact the primary assignment line manager. 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. **Important:** 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.
Non-Advertised Post	HR Operations will reassign the tasks **upon receipt of the Request for Transfer, Additional Post or Internal Secondment form** via Service

	Request. Once action taken in People and Money the tasks will be reassigned. In this scenario the request contract task will be removed as HR Operations will issue the contract/ secondment letter upon receipt of the form.

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.

Tips

- 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, the tasks will continue to be available for action via My Tasks or Organization Journeys.
- If the termination is backdated, 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.

Journey Name	Description	Automatically or Manually Assigned	Journey Assigned to
Leaving the University of Edinburgh	A Journey to support leaving the University process. For leavers with a termination reason: • Resignation • Resignation - Retirement (Standard Retirement action reason) • End of Fixed Term Contract	Automatic once the termination is fully approved.	Employee Line Manager SDA

	• Employment Terminated Due to Immigration Restrictions • Redundancy • Voluntary Redundancy • Voluntary Severance • Mutually Agreed Termination • TUPE Out		
Leaving the University for an involuntary reason	A Journey to support leaving the University process. For leavers with a termination reason: • Dismissal (capability) • Dismissal (conduct) • Dismissal (ill-health) • Dismissal (some other substantial reason) • Resignation - Retirement (ill health action reason) • Abandon Contract	Automatic once the termination is fully approved.	Line Manager SDA

Journeys for Staff Leaving their current post but remaining at the University

The Journey 'End of Assignment but continuing at the University' 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 <u>finish</u> 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(s) 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	Automatic based on the use of the following action reasons: -Transfer -Secondment	Employee Line Manager SDA

	additional assignment is processed in People and Money.	-Transfer to Non-Advertised Post -Add Assignment (Internal Secondment)	

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 Transfer Internal Secondment	Getting started in a new role	**For advertised posts** 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) **For non-advertised posts**

		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 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).

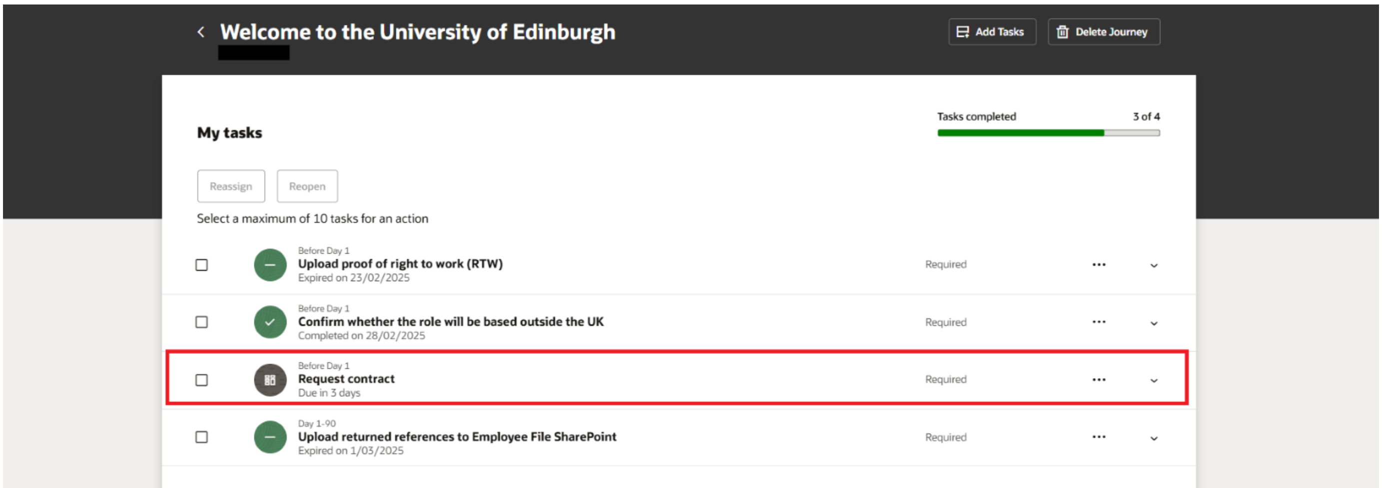
Before you start

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 date 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.

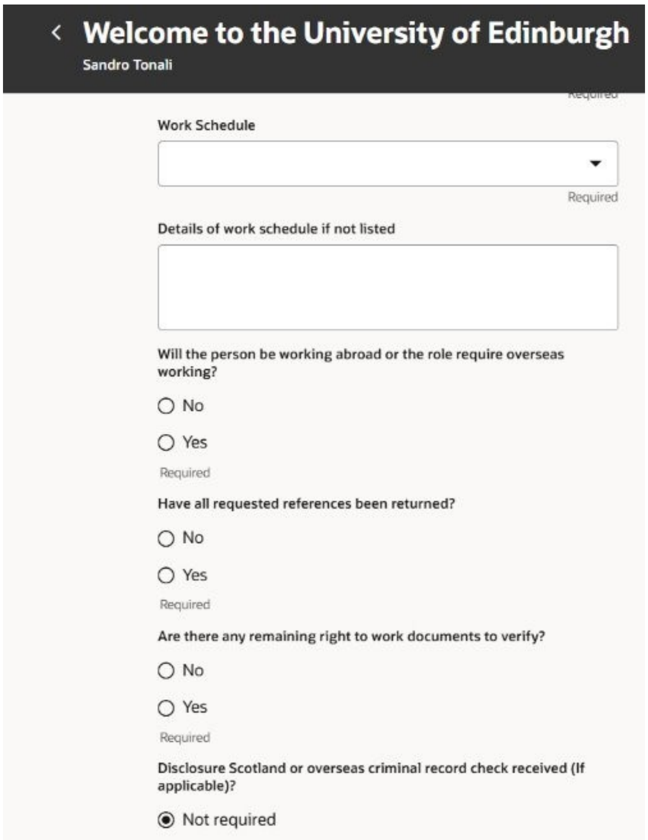
Completing the Request Contract Task

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

2. Click on the person you wish to view in more detail and find the Request Contract task, if this is not listed under My tasks you might find this under Others' tasks.



3. Click on the **name of the task** to expand the task description and then complete all 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.



4. 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.

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. Please note that this must match the start date in People and Money. If you need to amend this follow the guidance available within the .
*Work Schedule	Use the work schedule calculator 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". **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.** 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".
Total number of hours for Period (GH only)	Only specify if this is for GH contract, otherwise leave the field blank.
Period Hours Cover (GH only)	Only specify another option if this is for GH contract, otherwise leave "Not Applicable" selected. **Please note you should only select one of the following options:** • **Per Year = if the contract is for a year or longer** • **Over Period of GHC = if the contract is for less than a year** Period that hours above cover: 1. Over period of Current GHC 2. Over period of current FTC – **not in use** 3. Per Year 4. Per Year, Every Year – **not in use**

	5. Per Year, Every Year – over Duration of FTC – **not in use**
Annually Reviewed (GH only)	Only specify another option if this is for a GH contract, otherwise leave blank Is the GH contract reviewed annually? 1. No 2. Yes
Period End Date (GH Only)	Enter the end date of the GH period. This will typically be a calendar year from the start date, or match the end of the Fixed Term Contract date.
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	• Records any allowances to be applied to the contract. • 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. • If the costing codes for this allowance differ from the employee's salary codes, please also specify this.
Comments	Any additional information relating to the hire, it's helpful to include here a brief note of any attachments you are including to prompt HR Operations to check.
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
Enterprise Onboarding Checklist (This includes the Generic Preboarding checklist and the Day 1-90 Onboarding Checklist)	The generic preboarding checklist is automatically provisioned for **new hires** once they become a 'pending worker' in P&M. The Day 1-90 checklist is automatically provisioned from the new hires start date.
NHS Honorary Cover	Checklist to be manually assigned for roles that require NHS honorary cover. SDA/ Hiring manager should manually assign this checklist.
Skilled Worker Checklist	Checklist for new hires requiring sponsorship. Once person is a pending worker in P&M, the SDA/ Hiring manager should manually assign this checklist which will guide you through the tasks in the process for obtaining sponsorship. The Guidance - Use of the Skilled Worker Checklist (under the Recruitment and Onboarding heading, Offer and Hire section) provides further information.
Health Job Hazard Checklist	Checklist for roles that required a health risk assessment including, but not limited to Animal workers, Laboratory Managers/Technicians/workers, Night workers, Workshop staff, Principal Investigators/Research Group Leaders, Cleaners, Maintenance staff and Swimming pool maintenance staff. Local risk assessments must be used to identify any other applicable jobs. SDA/ Hiring manager should manually assign this checklist.
Internal Moves/Additional Posts	Checklist for internal transfers or those taking on an additional post, this can include Internal Secondments. SDA/ Hiring manager should manually assign this checklist and liaise with the primary assignment line manager to have the checklist reassigned.
Arcadia Checklist	Checklist for Arcadia staff only. Automatically provisioned.

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	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	N0
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 (CoS) application processed	International Staff	School/Dept Admin	Line Manager	Upload Certificate of Sponsorship (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
1.0	24/03/25	First version for publication	ME
2.0	19/05/25	Updated to reflect changes in 25B quarterly release.	ME/SK
2.1	04/09/2025	Updated Period Hours Cover (GH only) reasons to be used	ME/RM
3.0	17/10/25	Updated detail for duration and expiration dates and inclusion of new task for manual addition	SK/ME
3.1	25/05/25	Added the termination action reason ‘voluntary redundancy’ to the table in the Journeys for Staff Leaving the University section.	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.