THE UNIVERSITY of EDINBURGH

People and Money system

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

School or Department Admin Guide- How to assign and manage checklists and tasks

School or Department Admin

Line Manager

HR Ops

Contents

PM-1066 October 2023

Introduction

This guidance focusses on pre-boarding and onboarding checklists and tasks. A checklist is a group of tasks that need to be worked through, either at the pre-boarding stage (between offer acceptance and start date) or onboarding stage (in first 90 days of employment). Checklist templates have been created to group the most frequently used tasks together.

The Request Contract task must be manually assigned for all rehires, transfers and additional posts.

There may be individual tasks that need to be assigned in addition to these checklists. Individual tasks can be added to a checklist either from the task library or from out with, for example where a particular task is required to be completed in a unique situation or specific school.

New checklists and tasks which are frequently required but not covered by an existing checklist template or task (as outlined in the appendix) can be requested by raising a service request to HR Systems.

Unitemps will need to have their checklists deleted.

Reminders to complete tasks are sent to task performers regularly and notifications are sent to the appropriate people (task owners) to confirm that.

The Request Contract task must be completed for all new hires, rehires, transfers and additional posts – this alerts HR Operations to generate the contract unless this is completed the new start will not receive this.

Line Mangers will access the Onboarding app via **My Team** rather than **My Client Groups**.

Further guidance on the end to end recruitment process is available within the [Guide to Recruitment and Onboarding.]

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

Onboarding checklists within People and Money

The table below summarises the Onboarding checklists within People and Money, please refer to the [Appendix] for the full content of each checklist.

Checklist Name	Description	Auto or Manual Provision

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.	Automatic (for new hires only) **For rehires, this must be manually assigned**
NHS Honorary Cover	Checklist to be manually assigned for roles that require NHS honorary cover. SDA/ Hiring manager should manually assign this checklist.	Manual
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.	Manual
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.	Manual
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.	Manual - see section below

Arcadia Checklist	Checklist for Arcadia staff only. Automatically provisioned.	Automatic for Arcadia employees only

New Hires and Rehires

Pending workers (new hires and rehires) will receive an email providing temporary login details from HR Systems the day after their pending worker record has been created. These credentials should be used to access the People and Money onboarding tasks allocated to them until their start date. On their start date they will access People and Money via Single Sign On and their pending worker access will be removed so they will need to be provided with their UUN by their local administrator.

- **New Hires -** The Enterprise Onboarding checklist will be auto-provisioned once a pending worker record is created. Other checklists are available to assign from a library as indicated by the details of the job requisition. The request contract task must be completed for the new employee to receive their contract.
- **Rehired employees** must have the Enterprise Onboarding checklist **manually assigned** and the request contract completed for the employee to receive their contract. The trigger to assign the checklist is the receipt of the notification received from HR Operations which reads “Assignment is complete for candidate” which informs the recruiter that the pending worker record has been approved.

Important - Anyone who is new or returning to the University must complete the bank details and tax information checklist tasks. They must provide their UK bank details and anyone returning to the University must check that the bank details provided previously are still correct. It is also necessary for them to provide their tax information for HMRC. **Hiring teams should encourage new starters to do this on their first day, especially staff on guaranteed hours contracts** who must have entered or checked these details by the next available payroll processing day. It is important they do not to wait until they make a claim for hours worked as doing so may result in a delay to their first pay being received.

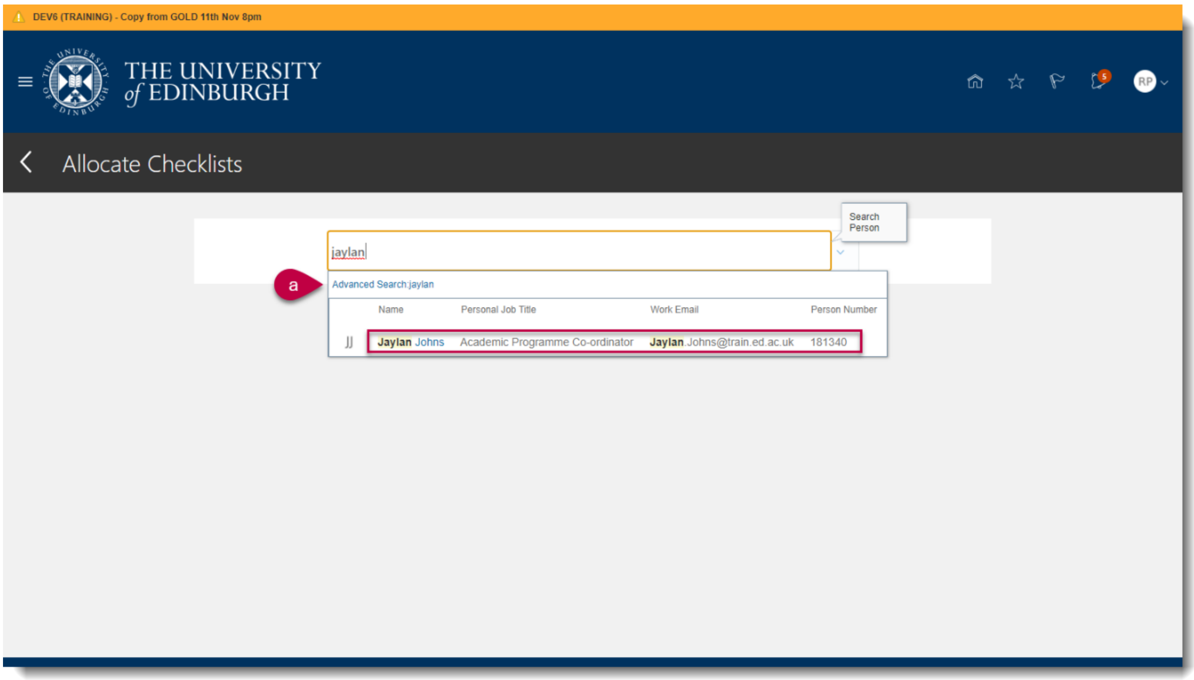
Transfers, Additional Posts and Internal Secondments - **Must** have the transfer/additional assignment checklist **manually assigned** and the request contract task completed in order for them to receive their new contract. **Please read the section below for full details.**

Assigning a Checklist (new hires/rehires)

1. From the Home page click **My Client Groups**
2. Go to **Show More** and select **Allocate Checklists**.

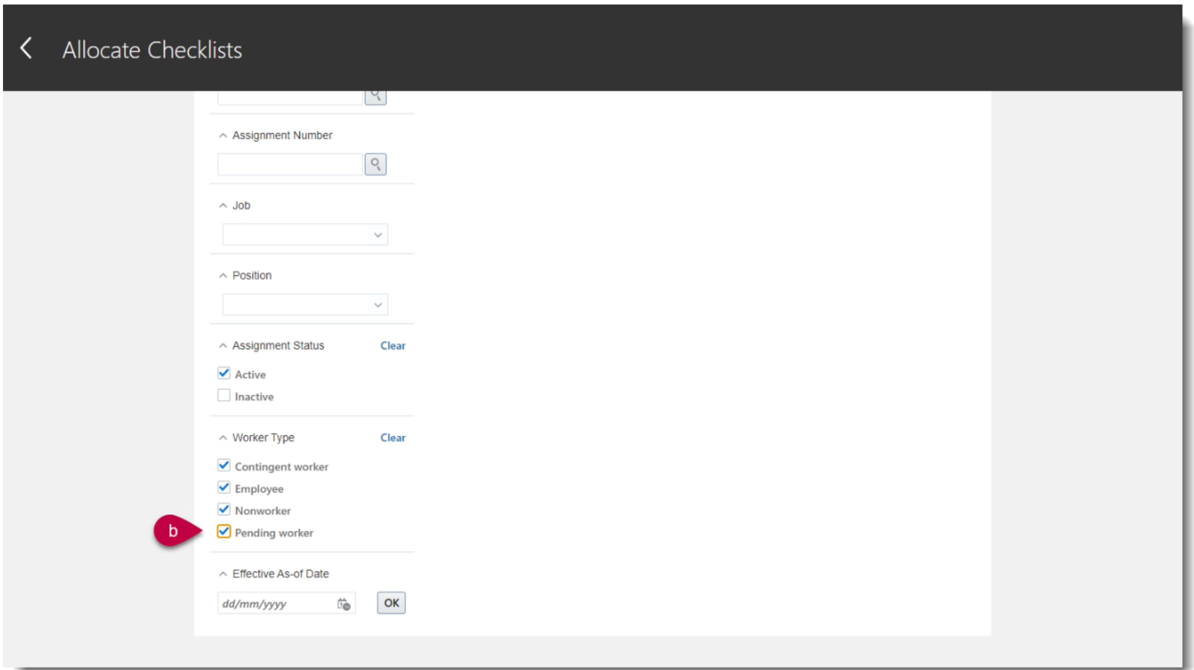
3. Search for and select the pending worker/employee.

For existing employees, the person record will show in the initial search screen:

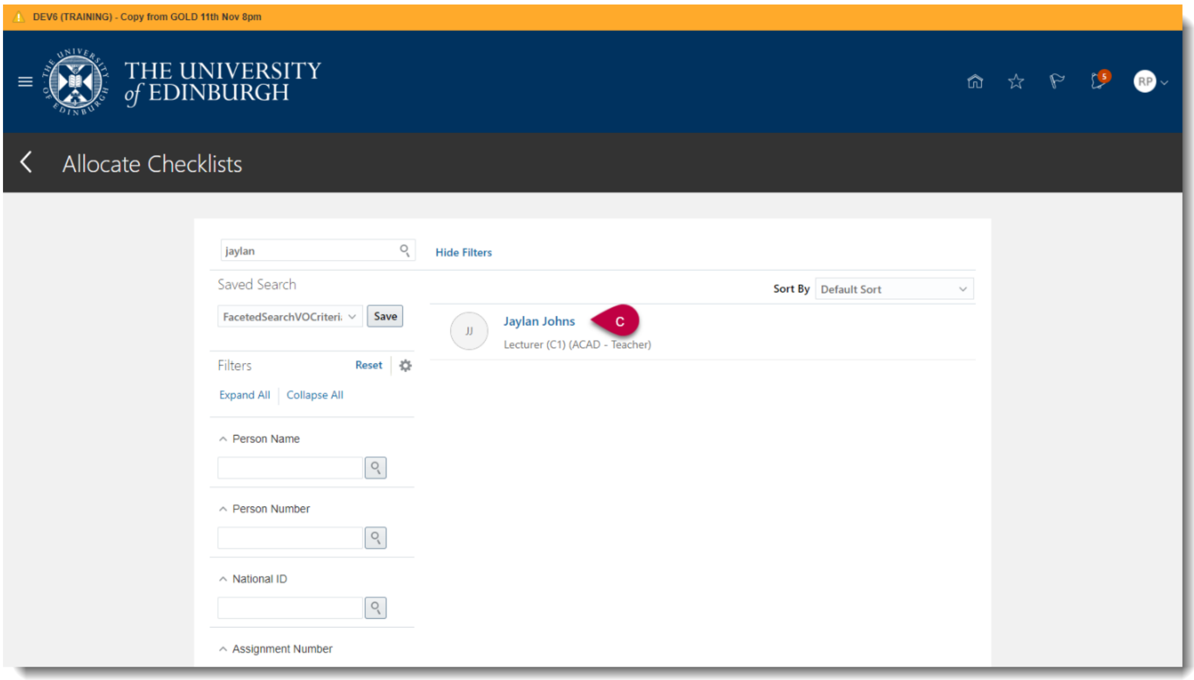


a. For pending workers and rehires you will need to select **Advanced Search.**

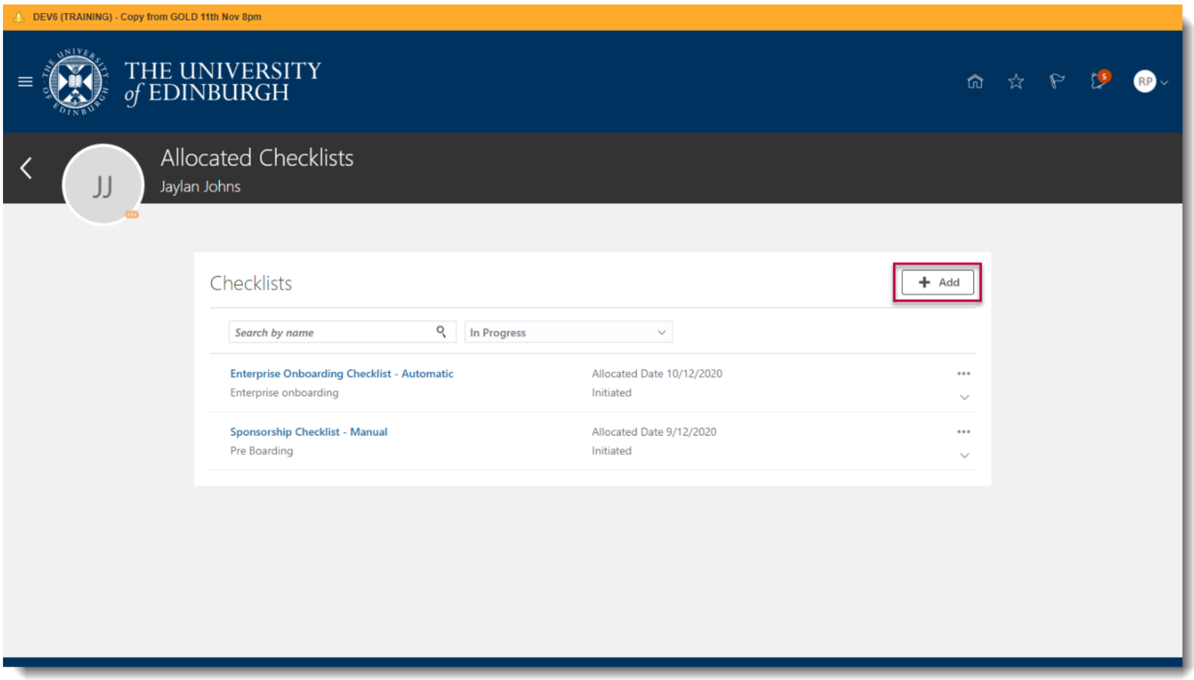
b. Click **show filters** then select the **Pending Worker** checkbox:



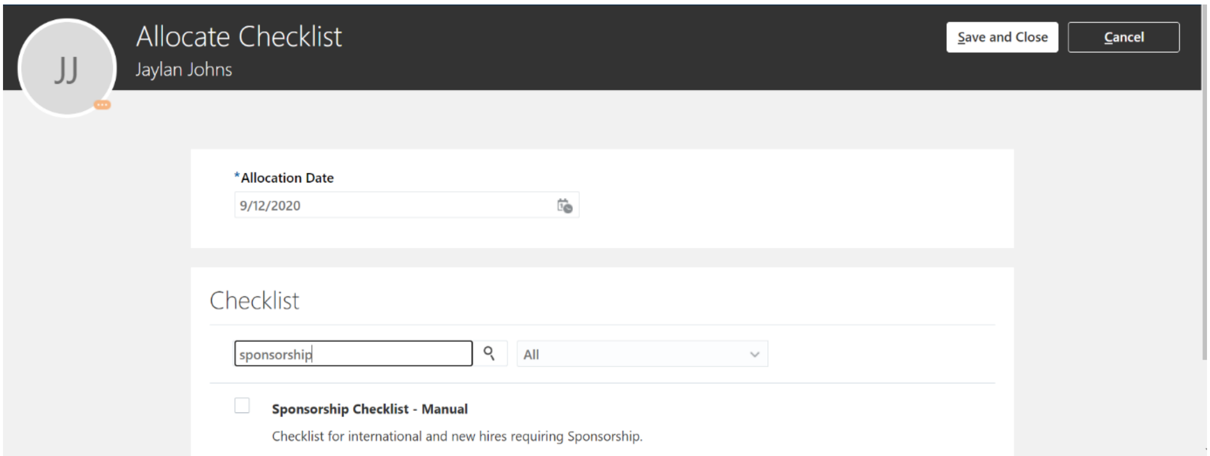
c) Then select the pending worker record from the list



3. Select **Add** to add a new checklist

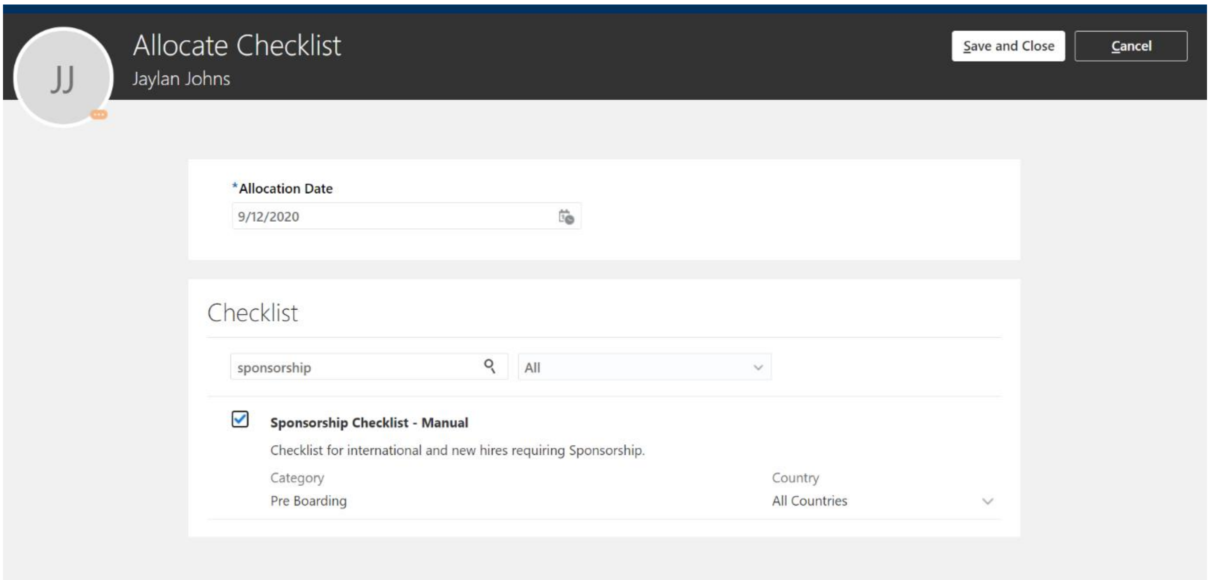


4. **Search** for the appropriate checklist. You can either scroll down then select **Load More Items** to view all available checklists or you can use the search field and search for the appropriate checklist using the Description from the list provided below.

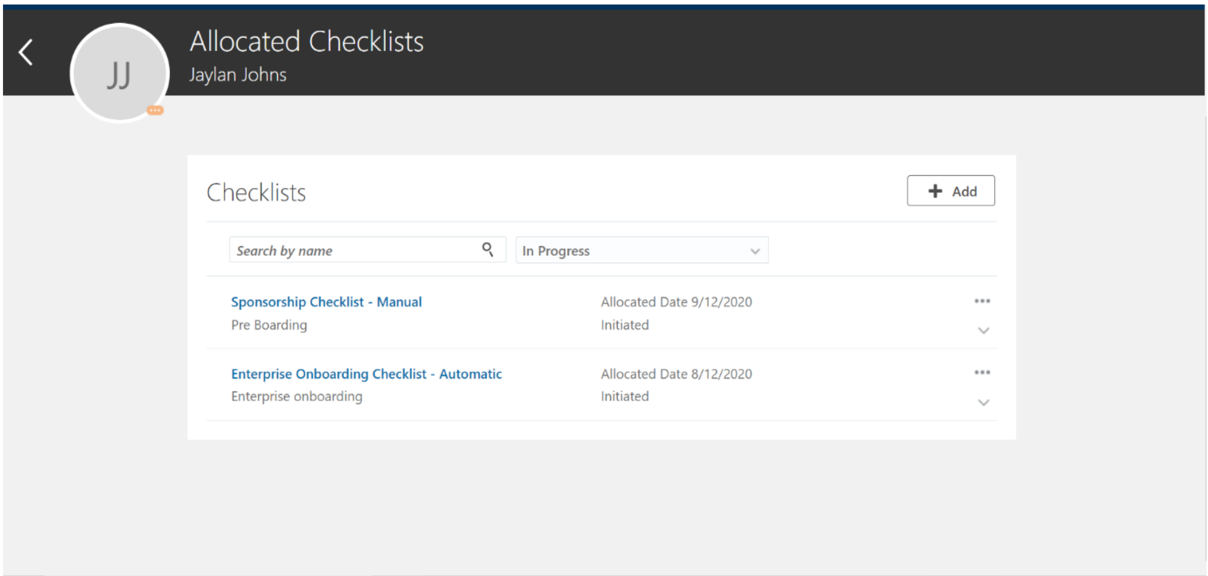


For further details on the tasks included in each of the checklists including information about who performs each is available in the Appendices

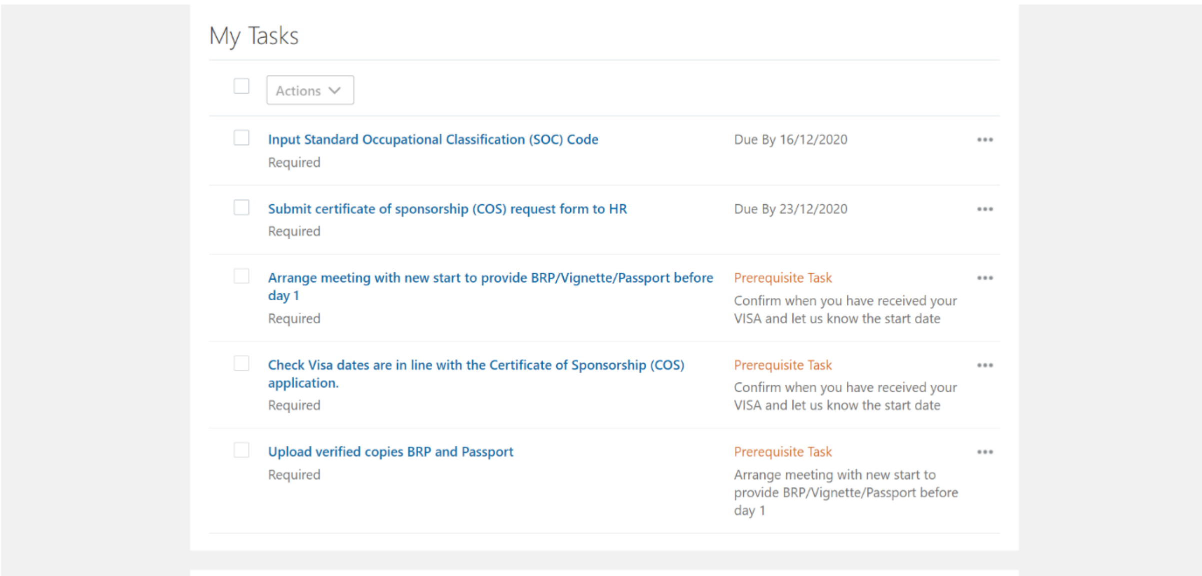
5. Tick the appropriate checklist and then select **Save and Close**.



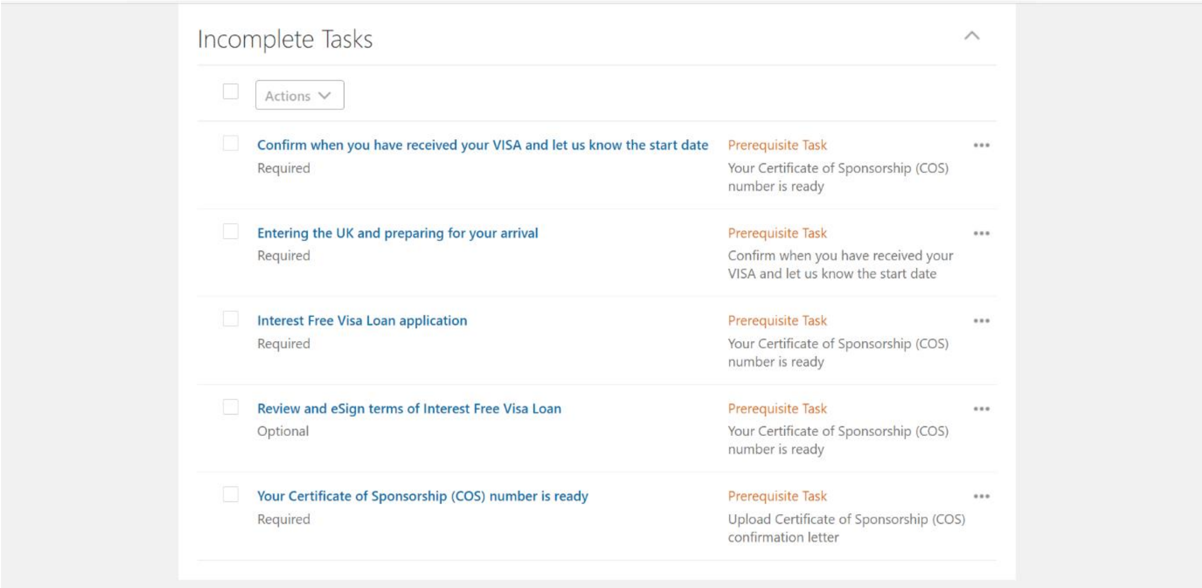
6. The checklist will now be available in the list of **Allocated Checklists**. Click on the checklist to open it.



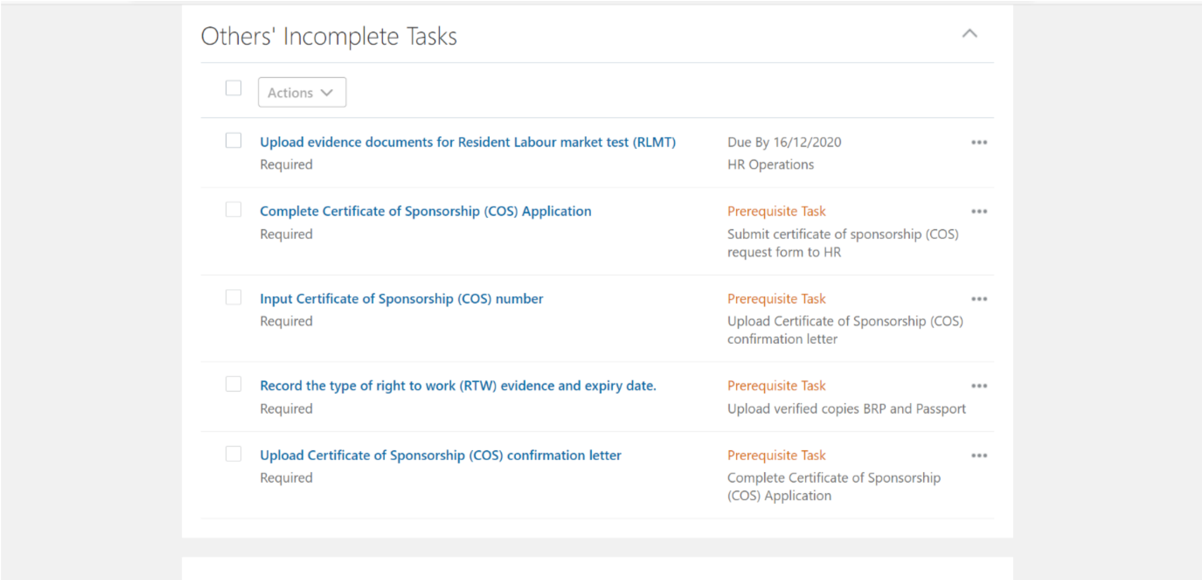
7. The list of allocated tasks is displayed. **My Tasks** includes the list of tasks assigned to you. If there is a task required before you can complete your task, this the **Prerequisite Task** information will be visible.



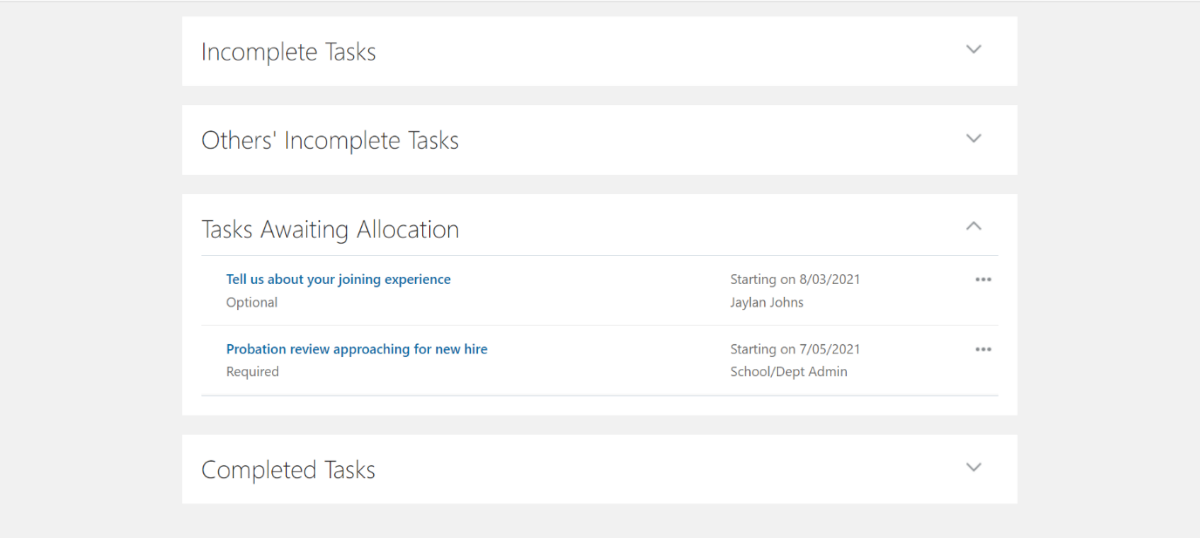
8. The **Incomplete Tasks** section lists the tasks which have still to be completed.



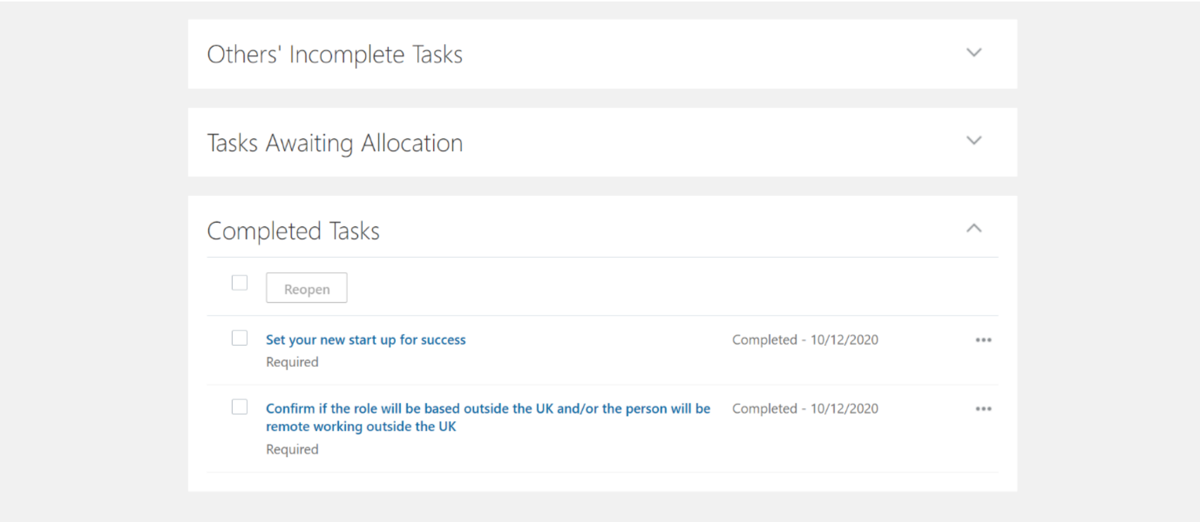
9. The **Others' Incomplete Tasks** section lists the tasks assigned to others in the University that need to be completed as part of the checklist.



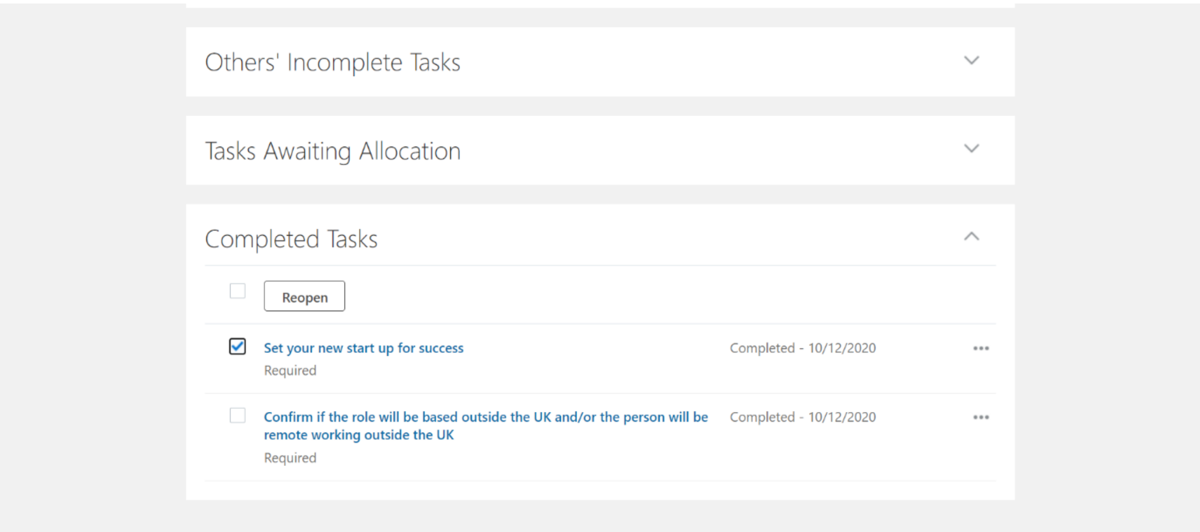
10. **Tasks Awaiting Allocation -** these are tasks which have prerequisite tasks associated to them or are only allocated at a certain time i.e. once the start date has passed.



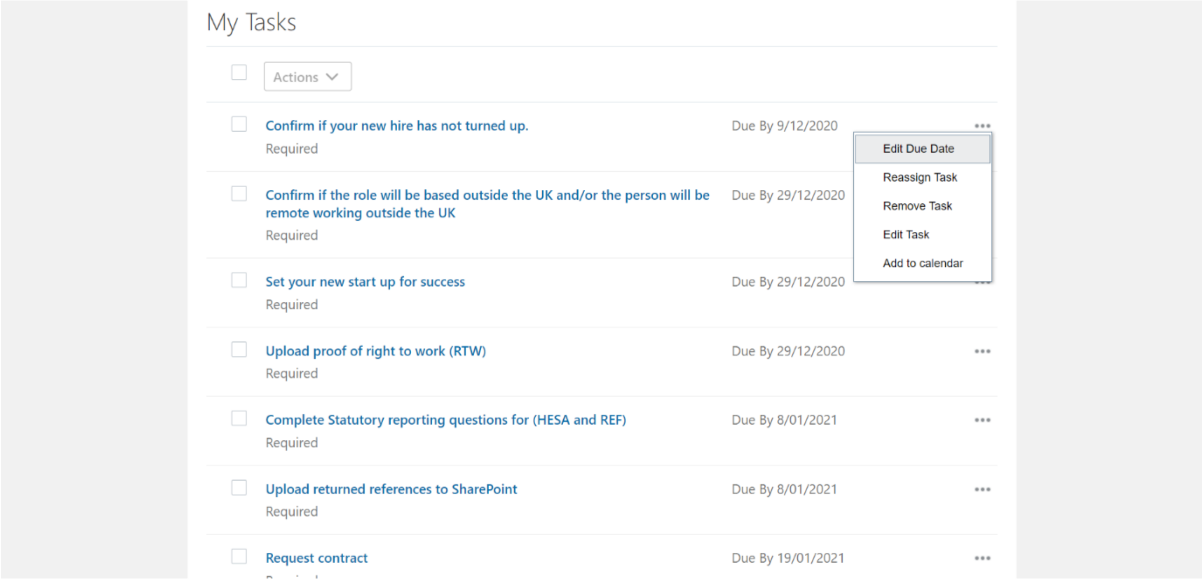
11. **Completed Tasks** list the tasks that have been completed**.**



To **reopen** a task, select the checkbox to the left of the task then click **Reopen.** This could be used if a task has been marked as complete in error or prematurely.

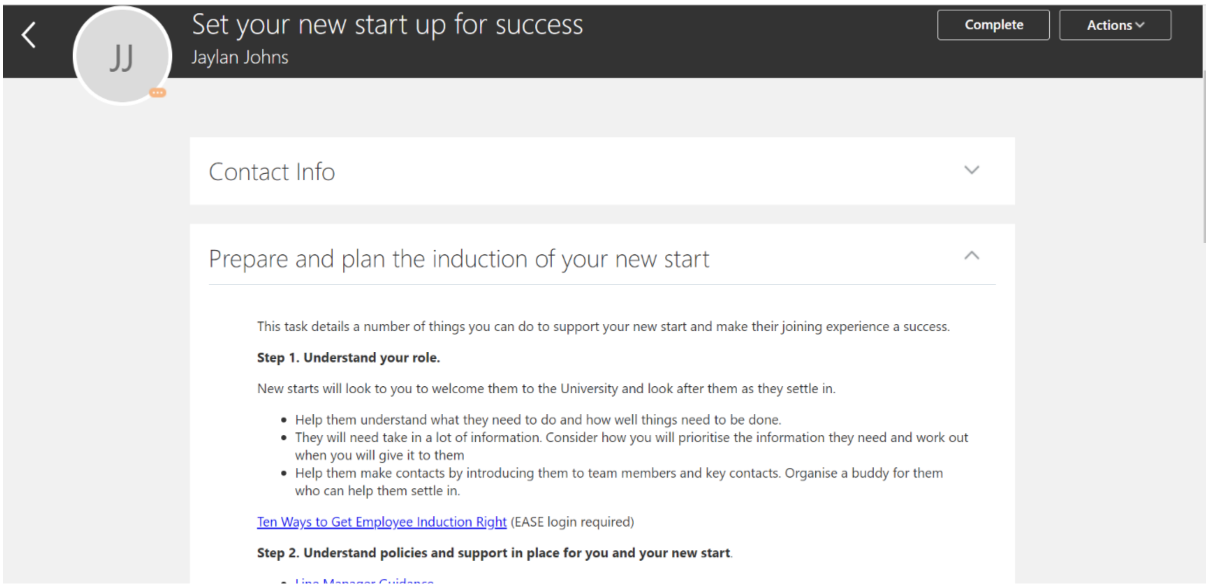


12. You can make changes to individual tasks from this page by clicking on the ellipsis and selecting the appropriate action.



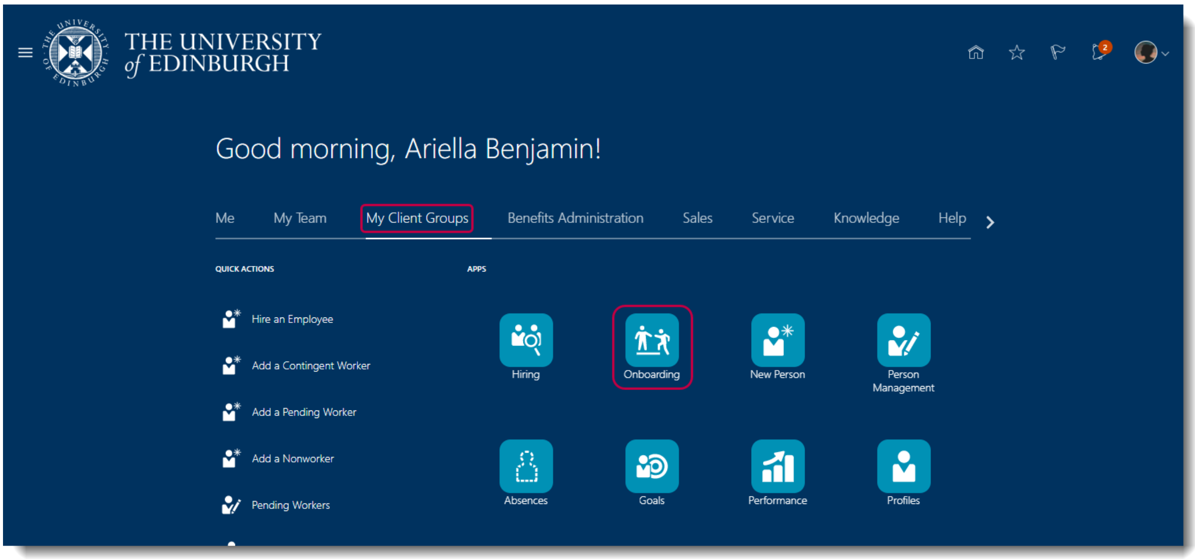
- **Edit Due Date** – edit the due date on any task. This may be used if the employee's start date changes, for example.
- **Reassign Task** – reassign tasks to another **Performer** for completion.
- **Remove Task** – any individual tasks that are not required to be completed by the employee can be removed if no long required or relevant.
- **Edit Task** – It is not expected that this would be used.
- **Add to calendar** – follow the onscreen instructions download tasks to your calendar. The calendar event includes a link to the task taking you directly to the task page from your calendar.

13. Click on the task to view the details. When you have completed the task, click on **Complete**.

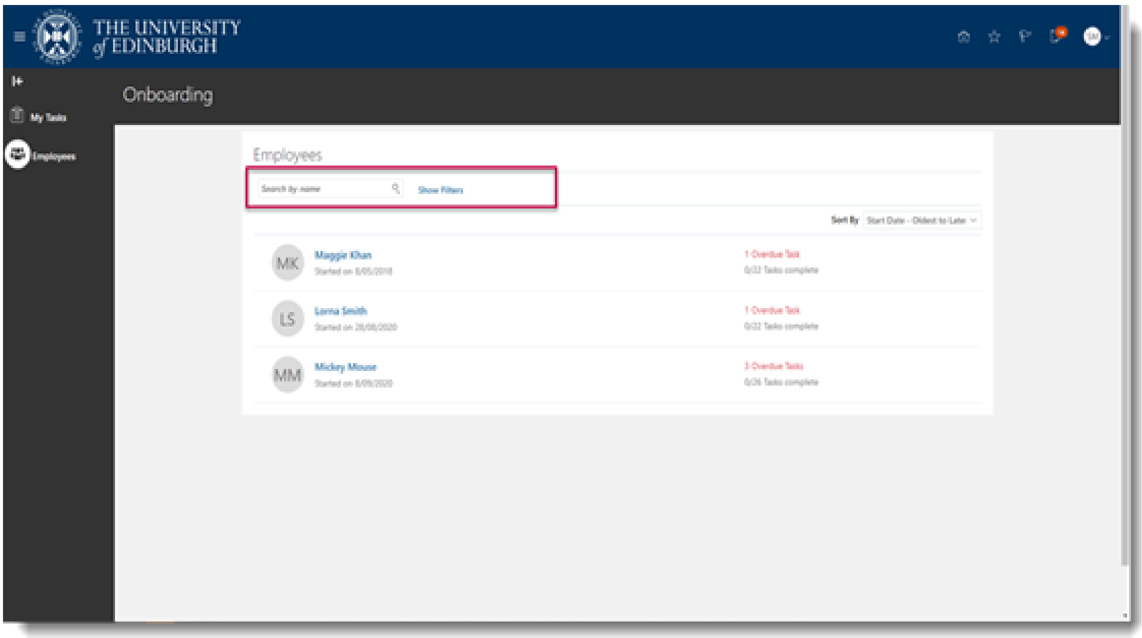

Set your new start up for success
Jaylan Johns
Complete
Actions
JJ
Contact Info
Prepare and plan the induction of your new start
This task details a number of things you can do to support your new start and make their joining experience a success.
Step 1. Understand your role.
New starts will look to you to welcome them to the University and look after them as they settle in.
Help them understand what they need to do and how well things need to be done.
They will need take in a lot of information. Consider how you will prioritise the information they need and work out when you will give it to them
Help them make contacts by introducing them to team members and key contacts. Organise a buddy for them who can help them settle in.
Ten Ways to Get Employee Induction Right (EASE login required)
Step 2. Understand policies and support in place for you and your new start.

Adding Individual Task(s) from the Library

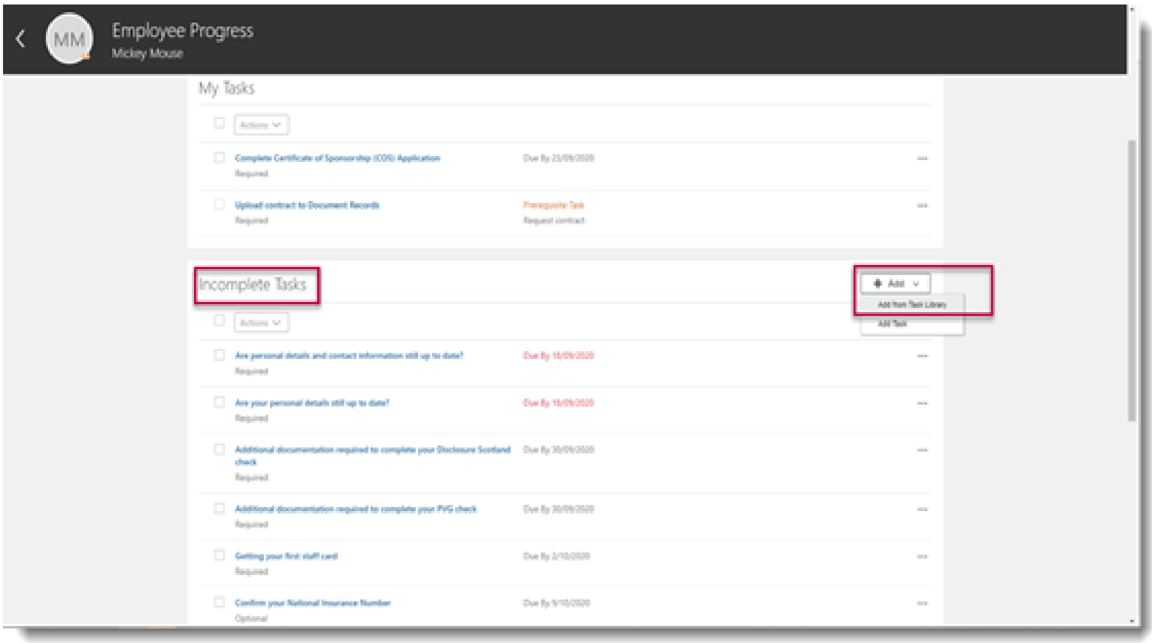
1. From the Home page click the **My Client Groups** link and select the **Onboarding** App.



2. Select the **Employee** tab and use the **Search** field to find and select the new hire Employee.

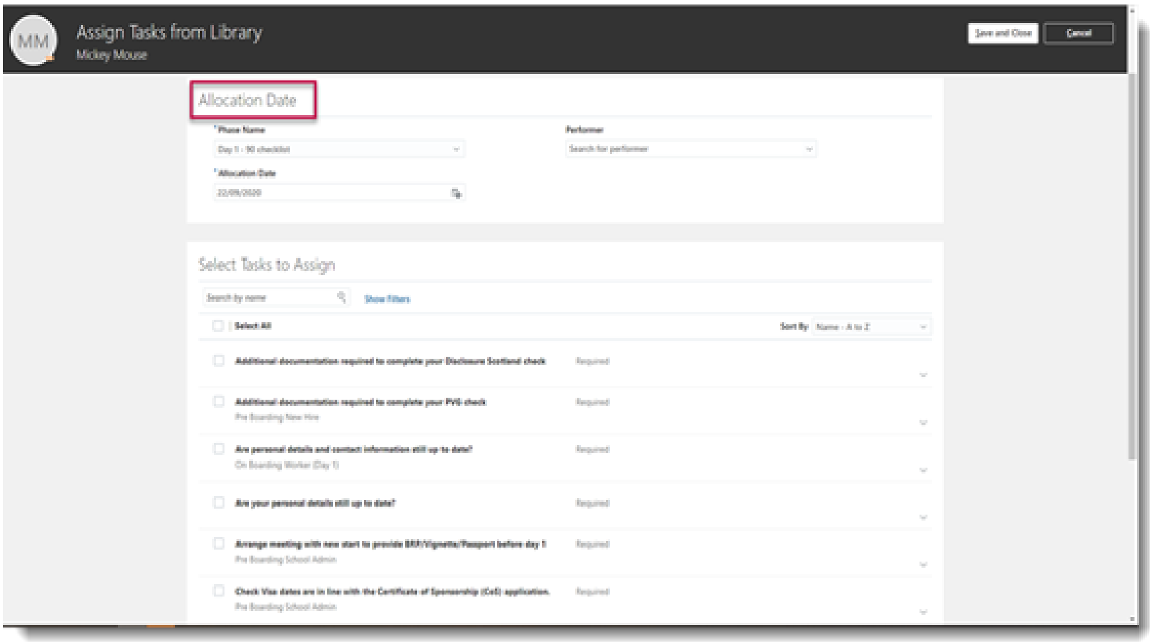


3. In the **Employee Progress** page, scroll down to **Incomplete Tasks.**



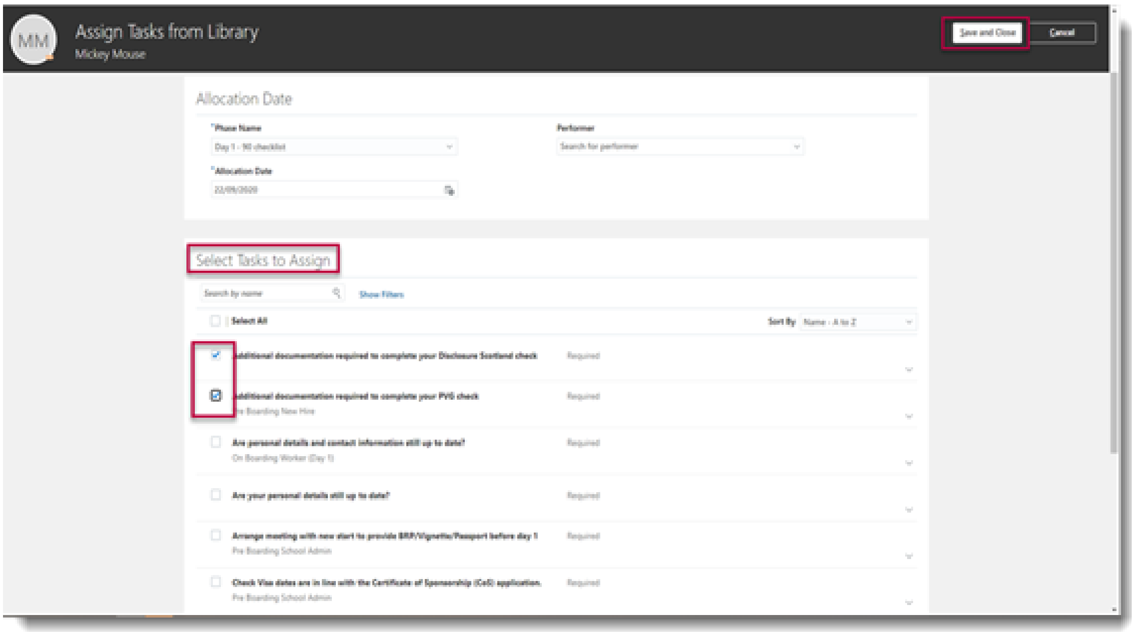
4. Click **Add** and select **Add from Task Library**.

5. In **Assign Tasks from Library** page, enter the details for **Allocation Date**.



6. In **Select Task to Assign** section, click the checkboxes next to the required onboarding tasks.

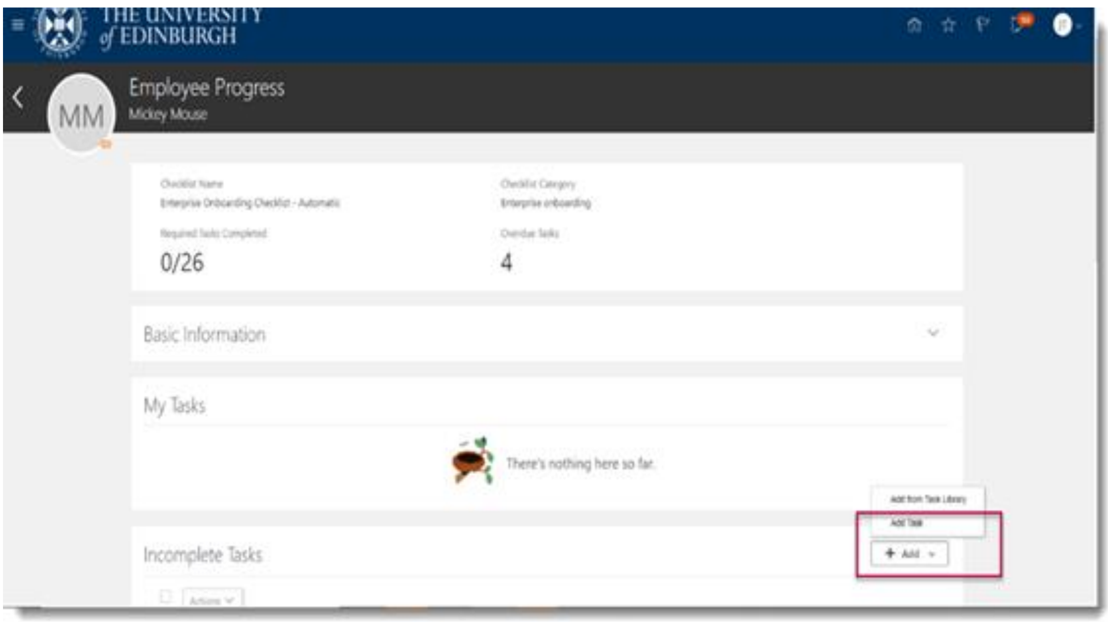
7. Click **Save and Close** and the onboarding task(s) will be assigned to the employee.



Adding Individual Task(s) not within the Library

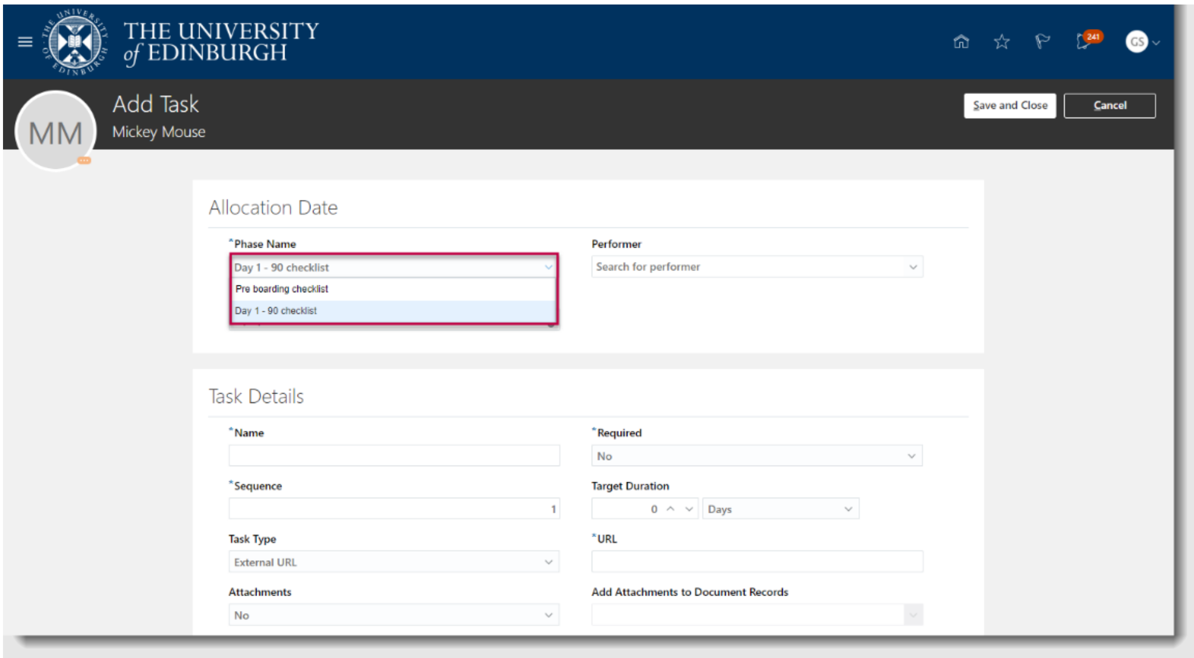
1. Follow steps 1 to 3 in Adding Individual task(s) from the Library above.

2. Click **Add** and select **Add Task**.

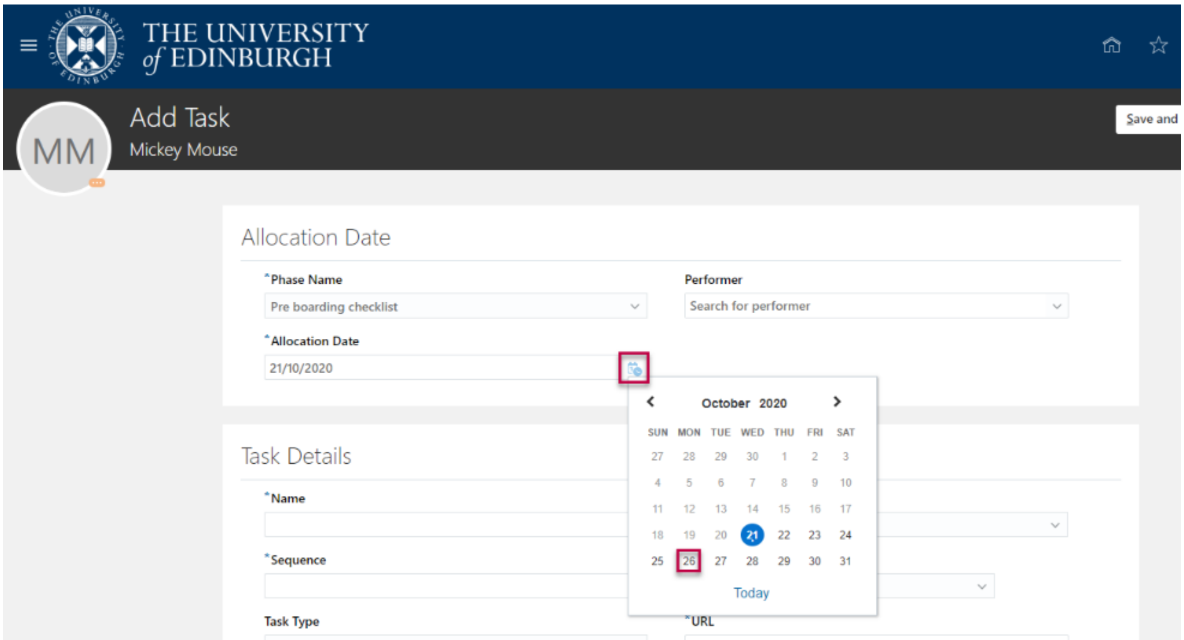


3. Scroll up to the **Allocation Date** section and select the appropriate **Phase Name**.

- For pre boarding select **Pre boarding checklist**
- For on boarding select **Day 1-90 checklist**

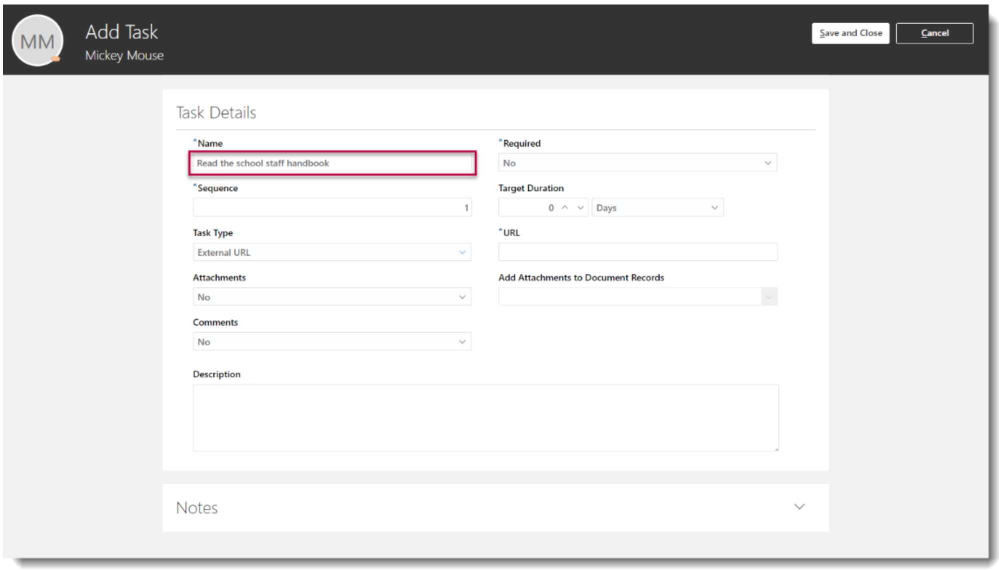


3. Click calendar icon and select the **Allocation Date** for the task.

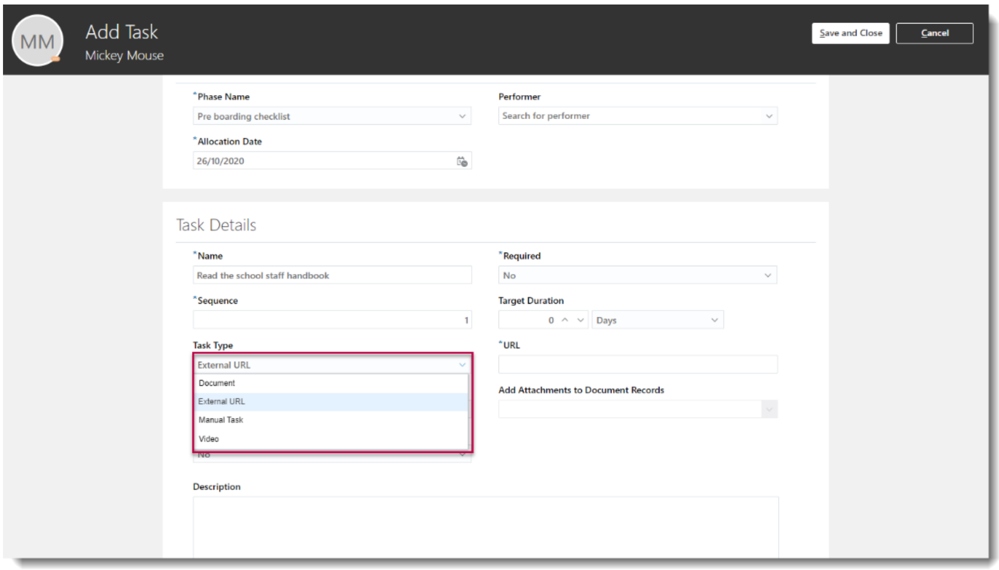


4. If the task is required to be completed by a member of staff, select their name from the **Performer** field. **Note**: Roles cannot be used. Otherwise, leave the field blank to assign the task to the new hire.

5. In the **Task Details** section, enter an appropriate **Name** for the task.



6. Click the **Task Type** down arrow to select an option to specify where the information to complete the task can be found.



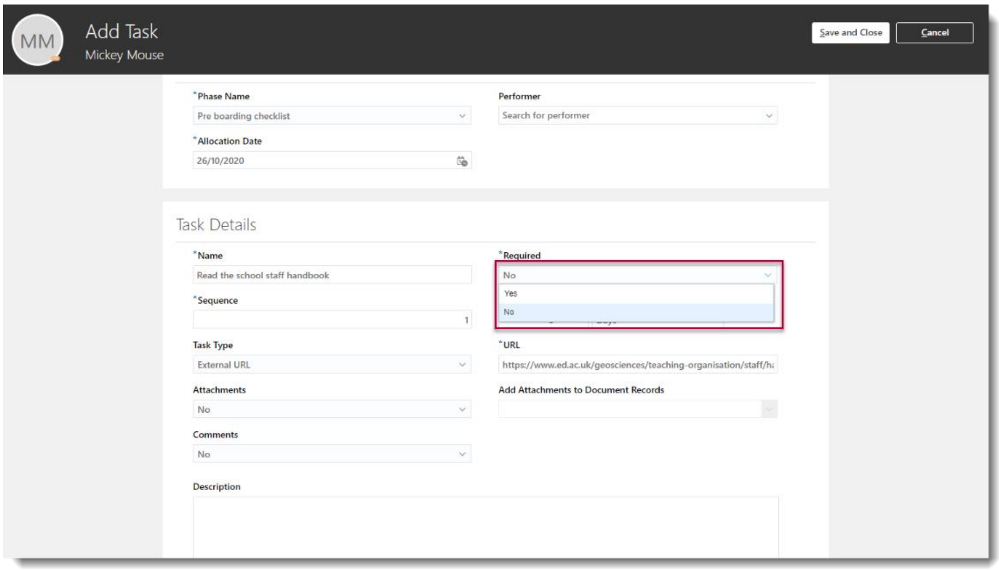
Document requires a document to be read or completed for example a manual or offline form.

External URL indicates the task can be completed by visiting a website. The website address must then be added to the **URL** field.

Video indicates a video need to be watched. This must be hosted on a GDPR-compliant website and the address added to the **URL** field.

Manual Task is selected when the task is completely offline.

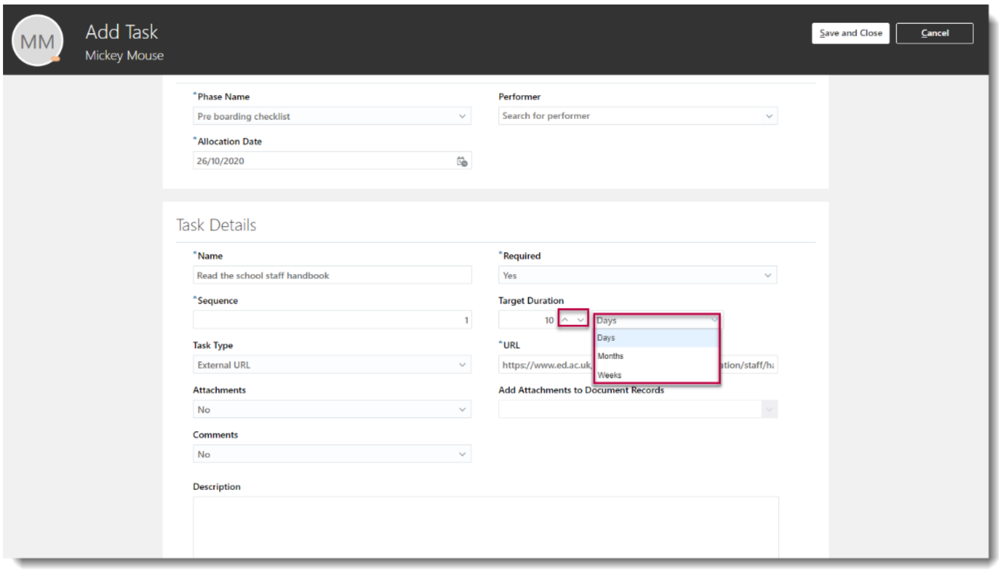
7. Indicate if the task is **Required** by selecting the applicable option.



Yes is used to indicate that the task is required for the checklist selected in the **Phase Name** field to show as complete.

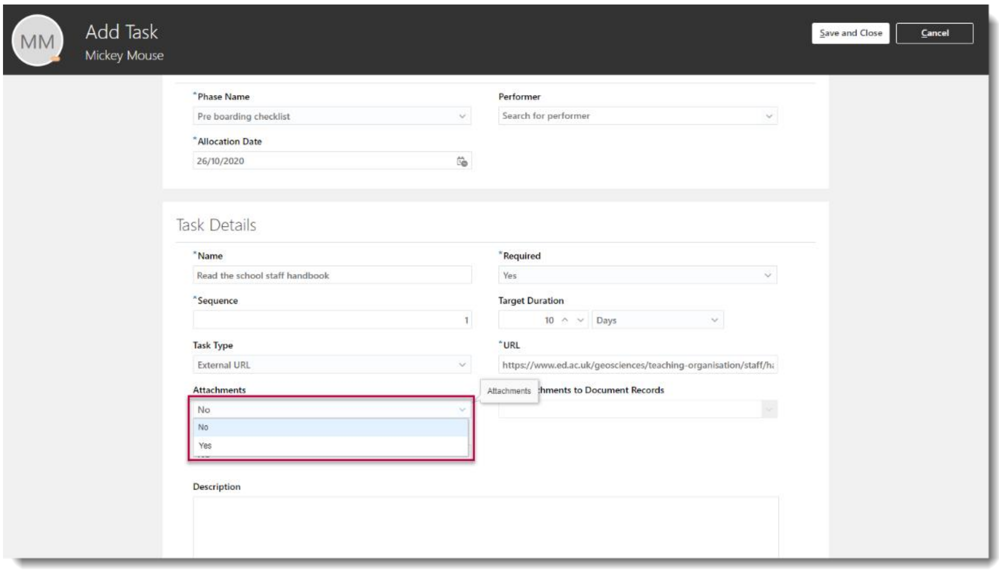
No is used to indicate that the checklist selected in the **Phase Name** field can show as complete if the task has not been completed.

8. Select the **Target Duration** within which time you would like the task to be completed

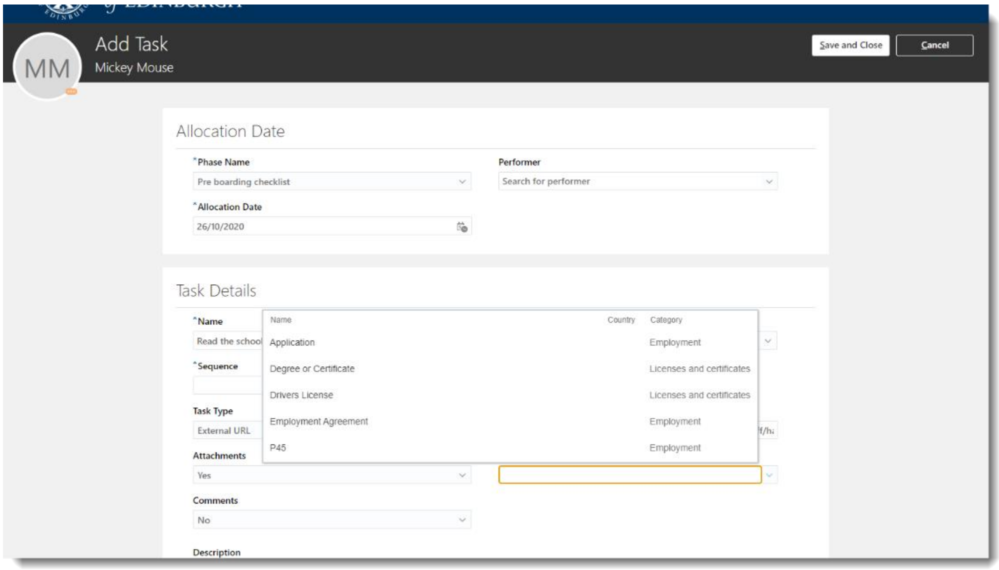


You may type a number into the field provided or use the arrows to increase/decrease the value as appropriate. Click the down arrow to indicate the appropriate timeframe.

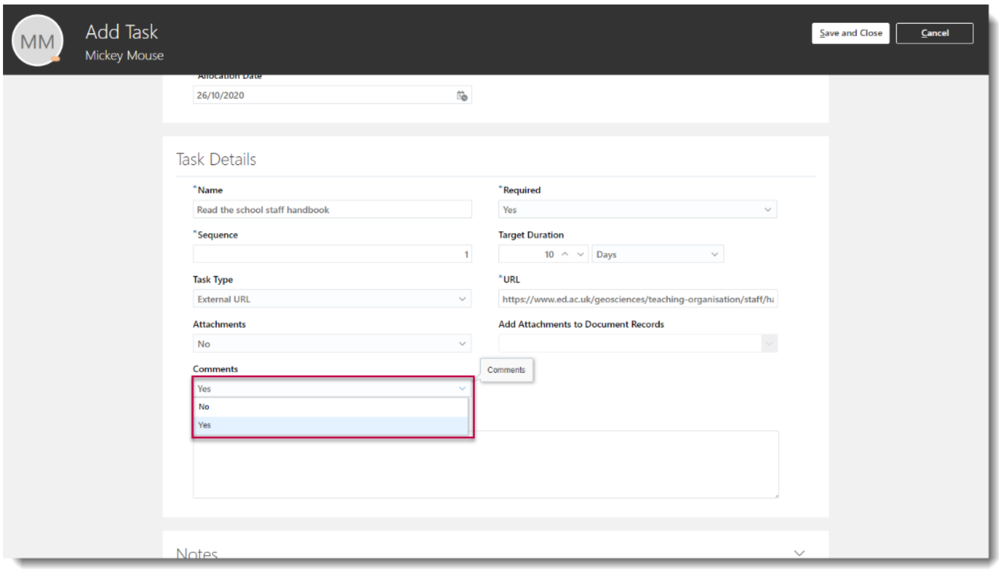
9. Select an option in **Attachments** to specify if the Performer is required to upload any documents to complete the task.



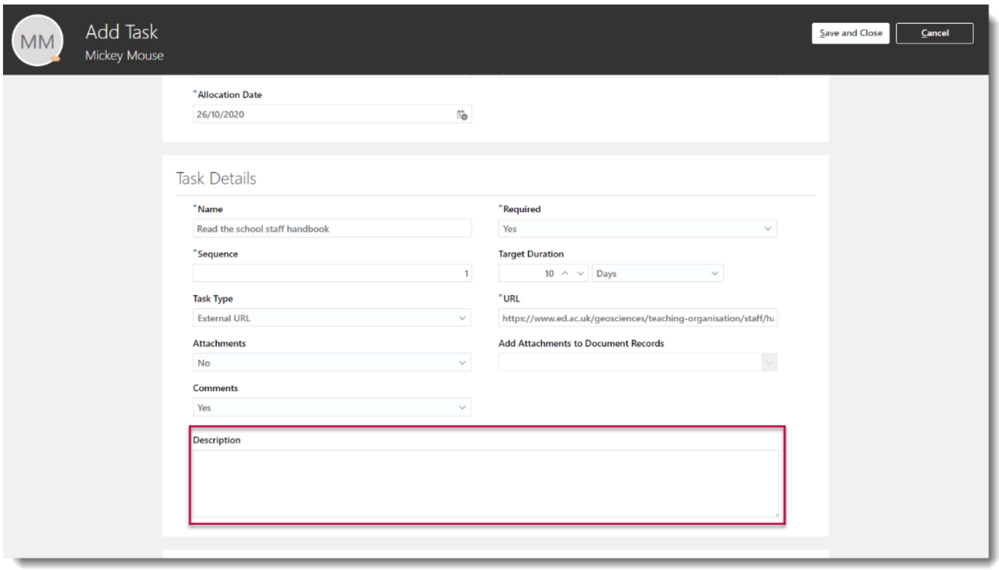
Where **Yes** is selected, use the **Add attachments to Document Records** dropdown to indicate which category of document type the attachment should be recorded against within Document Records as required



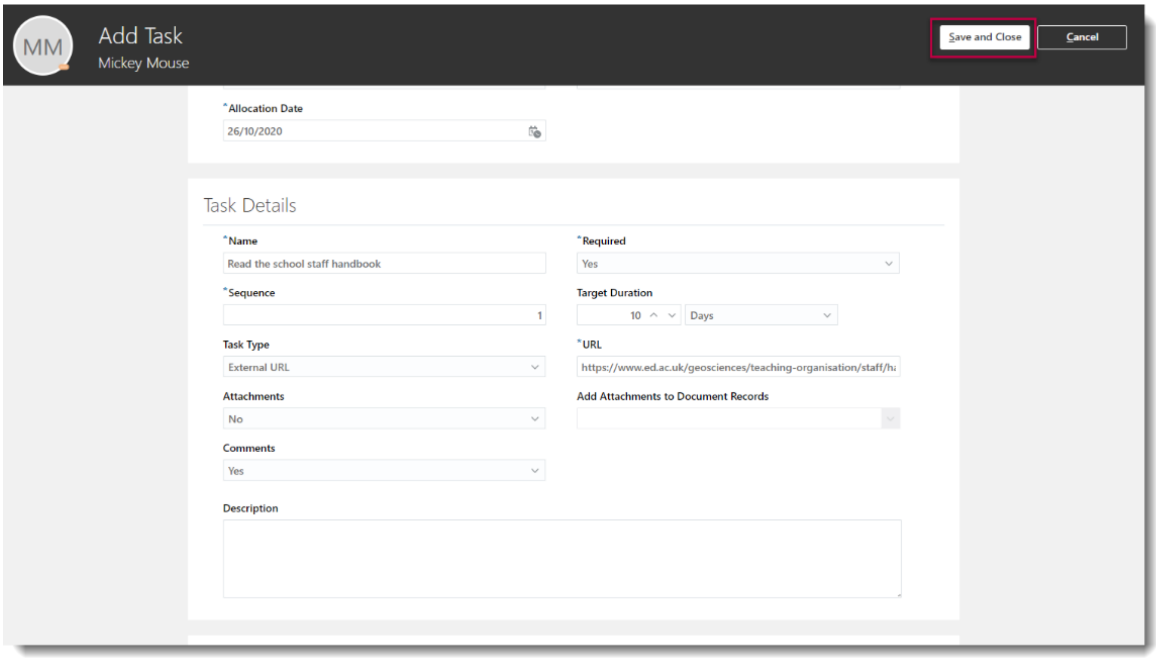
10. The **Comments** field is used to indicate if any written comments may be added to the task.



11. Add a task **Description** if required.

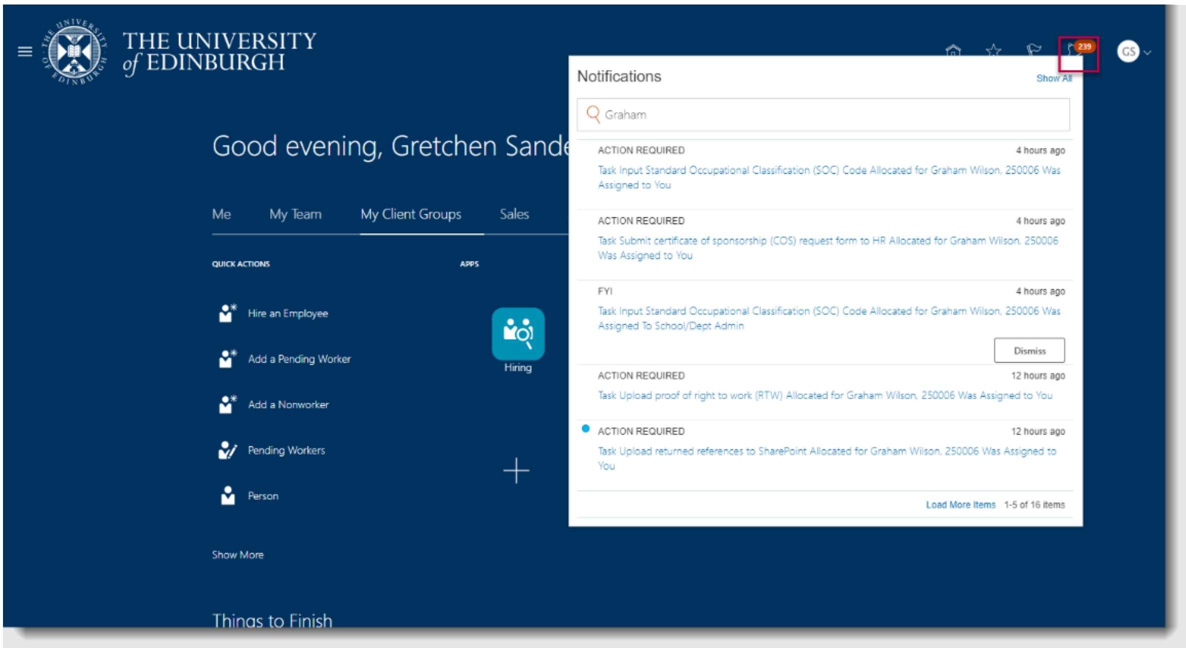


12. When complete, select **Save and Close**.



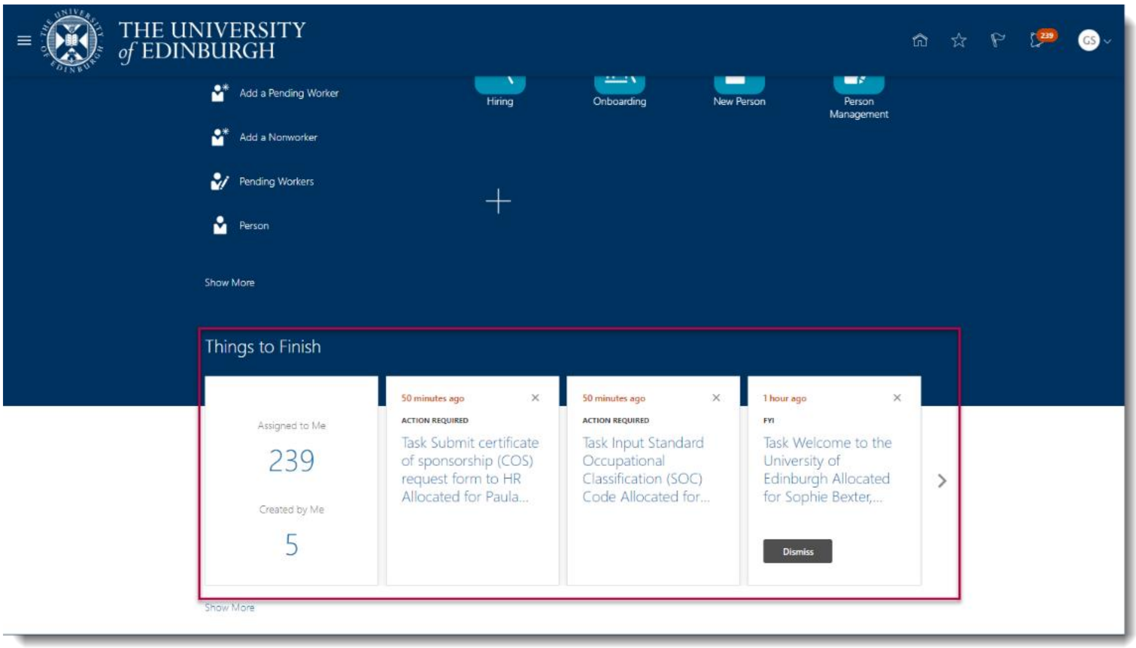
Completing a Task

1. You are notified of tasks assigned to you via the notification bell.

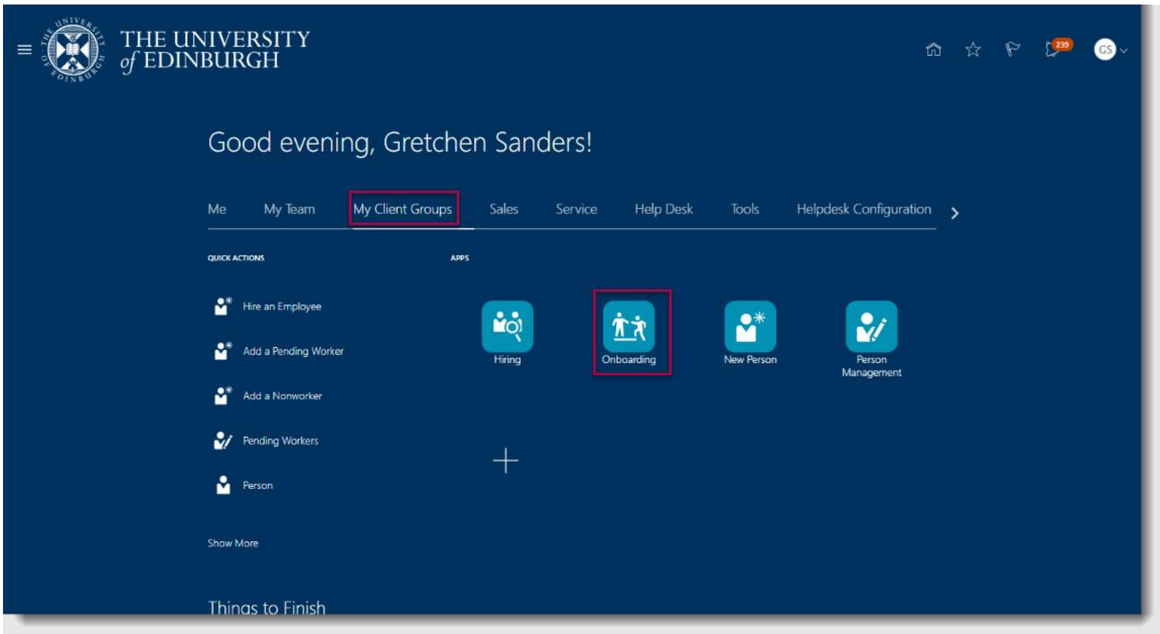


Or

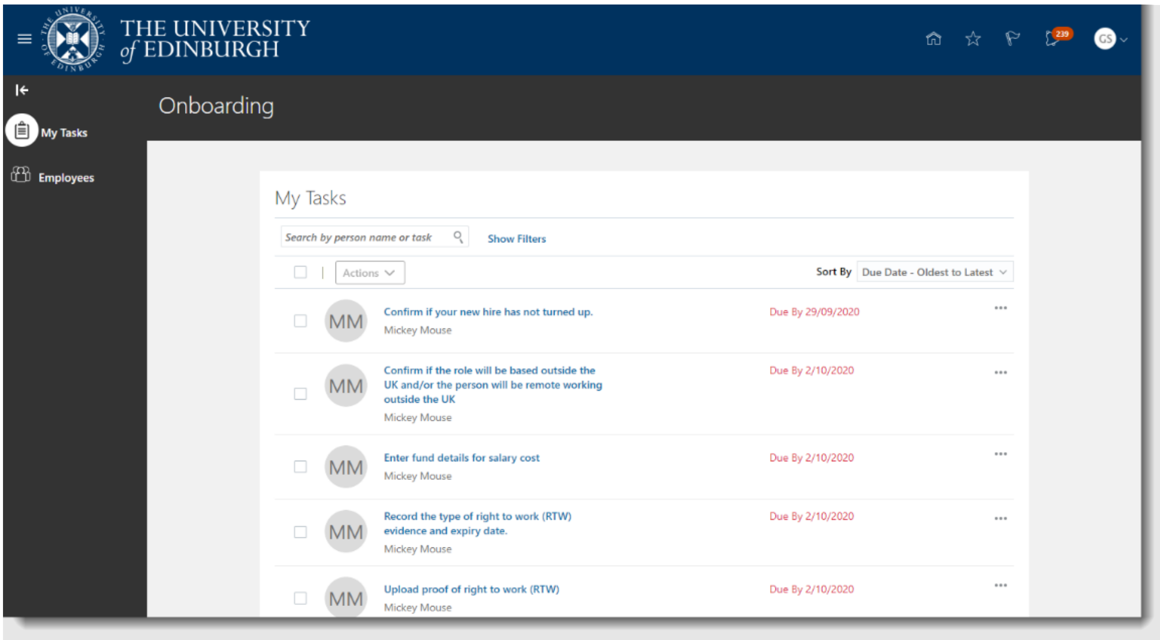
Within **Things to Finish** on the Home page.



2. To complete the task, select **My Client Groups** and click the **Onboarding** App.



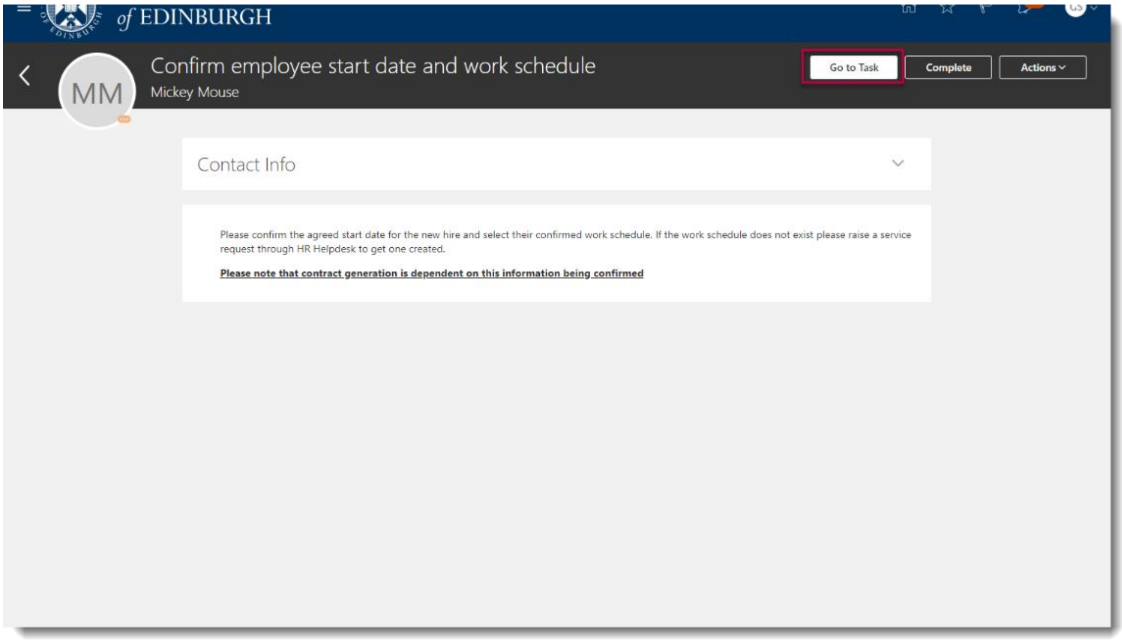
3. Click on the link of the applicable task to select it in **My Tasks**. You can also use the **Employees** tab to view all the tasks assigned to an employee.



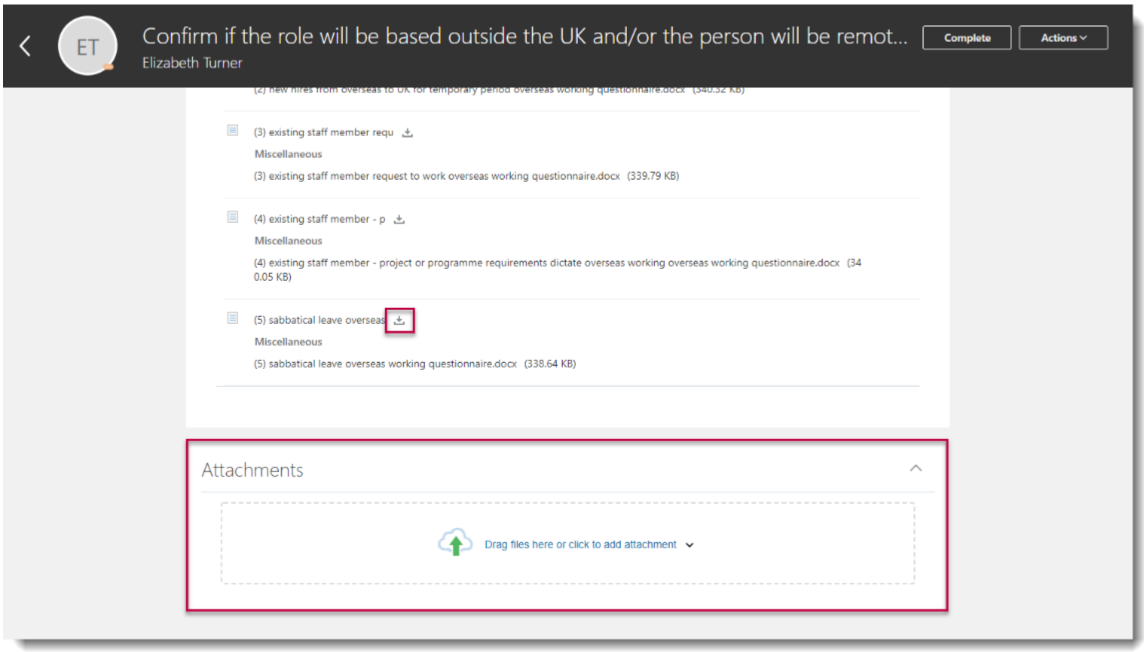
4. View the task information and complete the tasks as required. Different options may be presented depending on the task selected.

   a. For ‘confirm’ tasks an SR should be raised to HR to amend any incorrect information. Complete should only be selected if the data is correct.

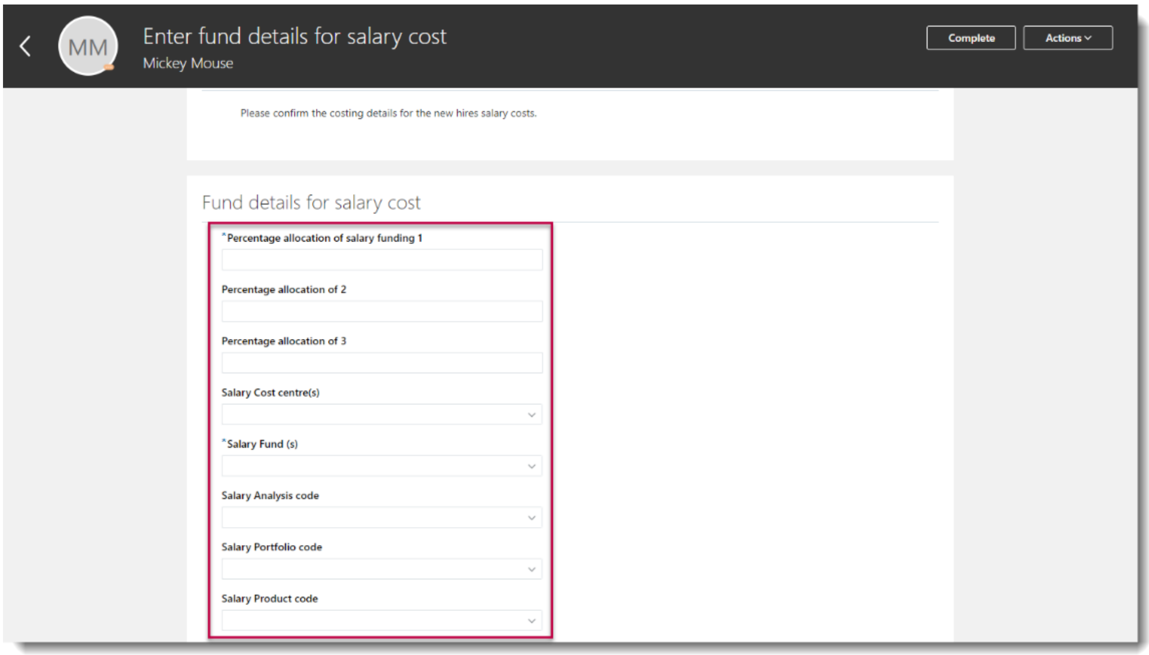
   b. Where possible, select **Go to Task** to view the details currently held in the system



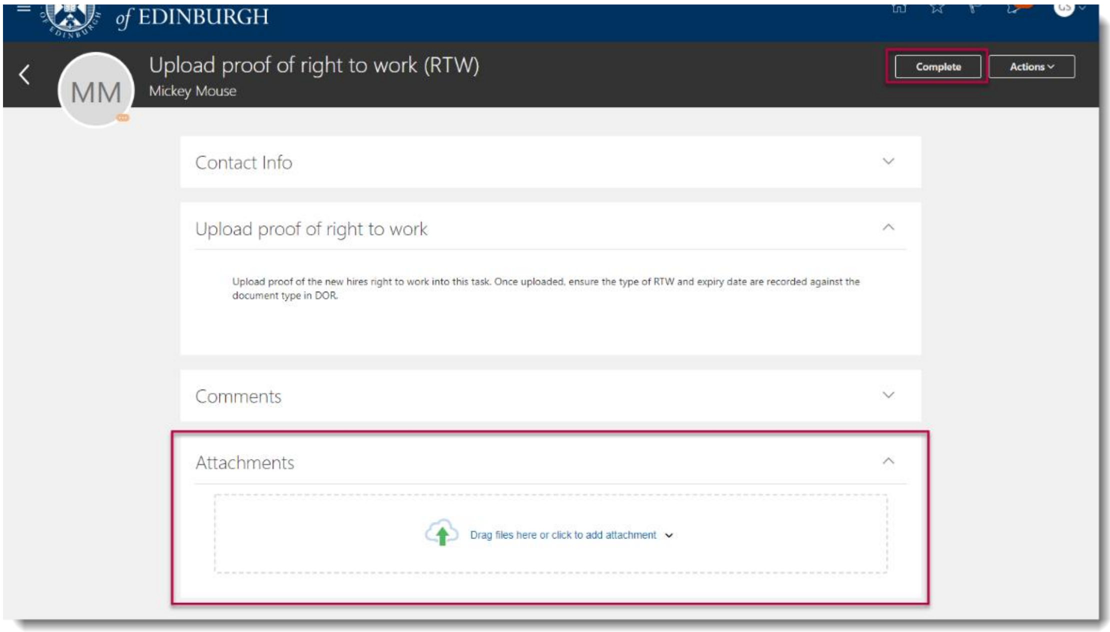
c. Download any required documentation by selecting the download icon and completing the form offline.



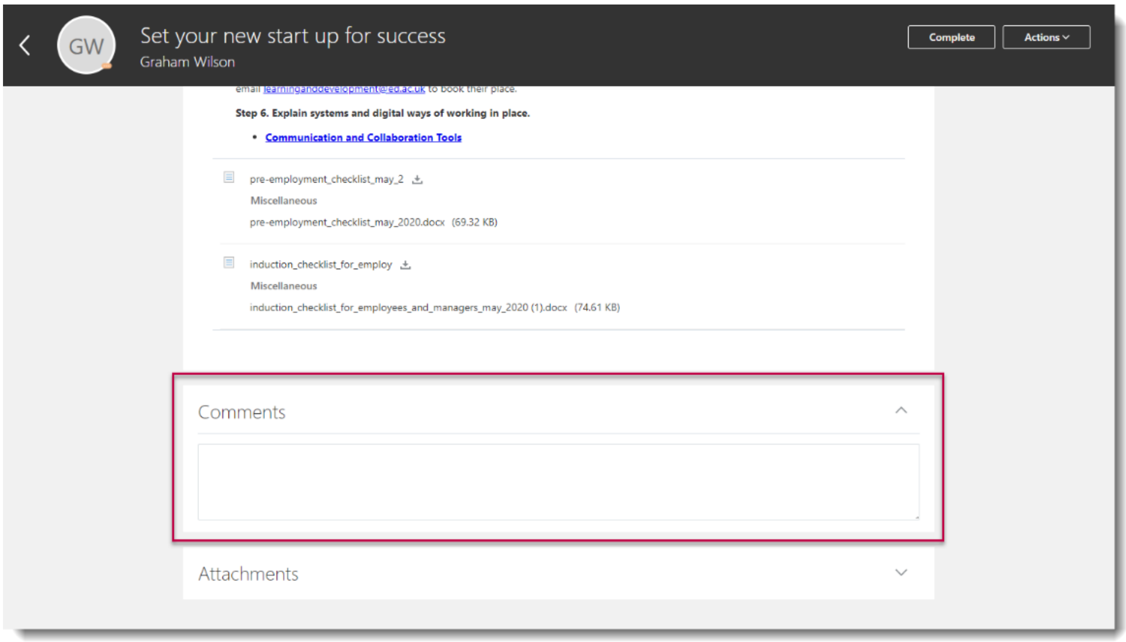
d. Complete any forms as required. Mandatory fields display an asterisk *



e. Upload any required documents in the **Attachments** section.

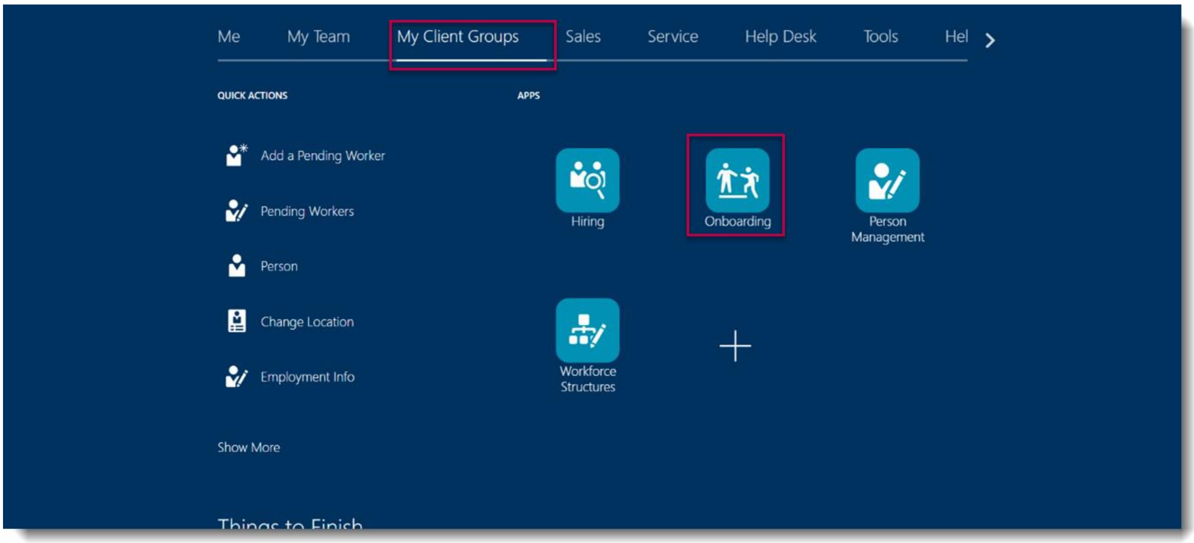


f. Add any **Comments** as required.



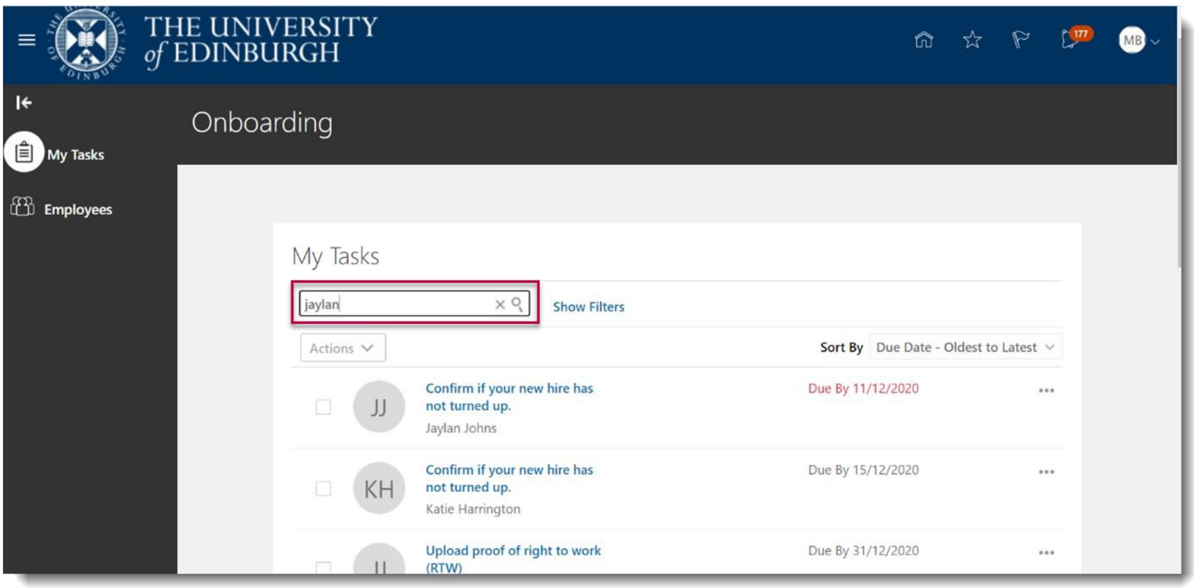
5. Click the **Complete** button when the task is finished.

Reassignment of Your Assigned Checklist Tasks to Someone Else (new hires and rehires)

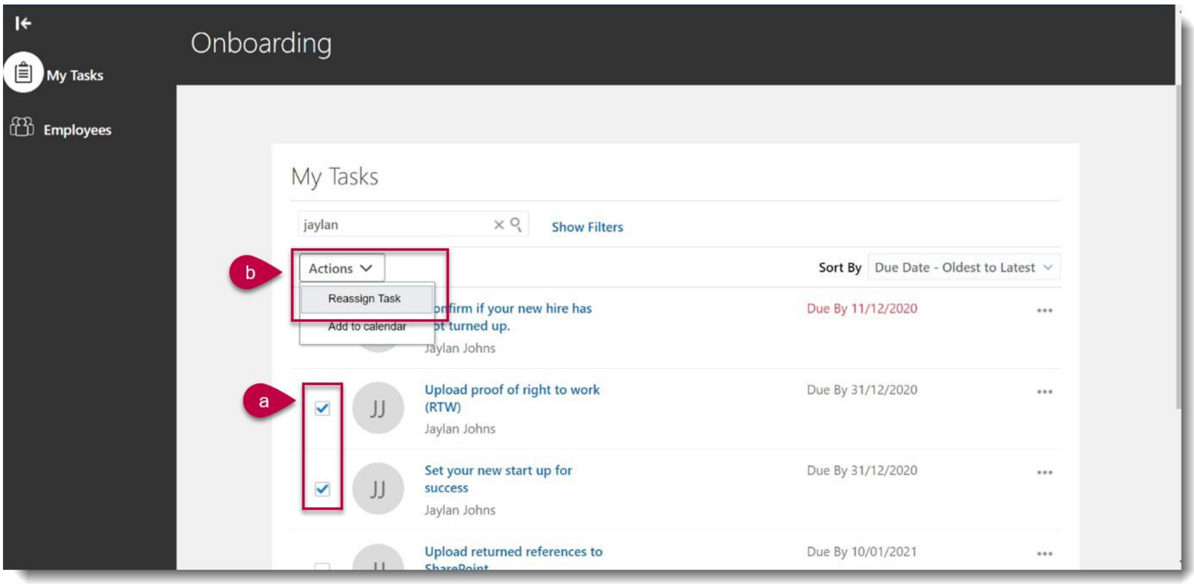


1. From the Home page click **My team/My Client Groups**. Select the **Onboarding** App.

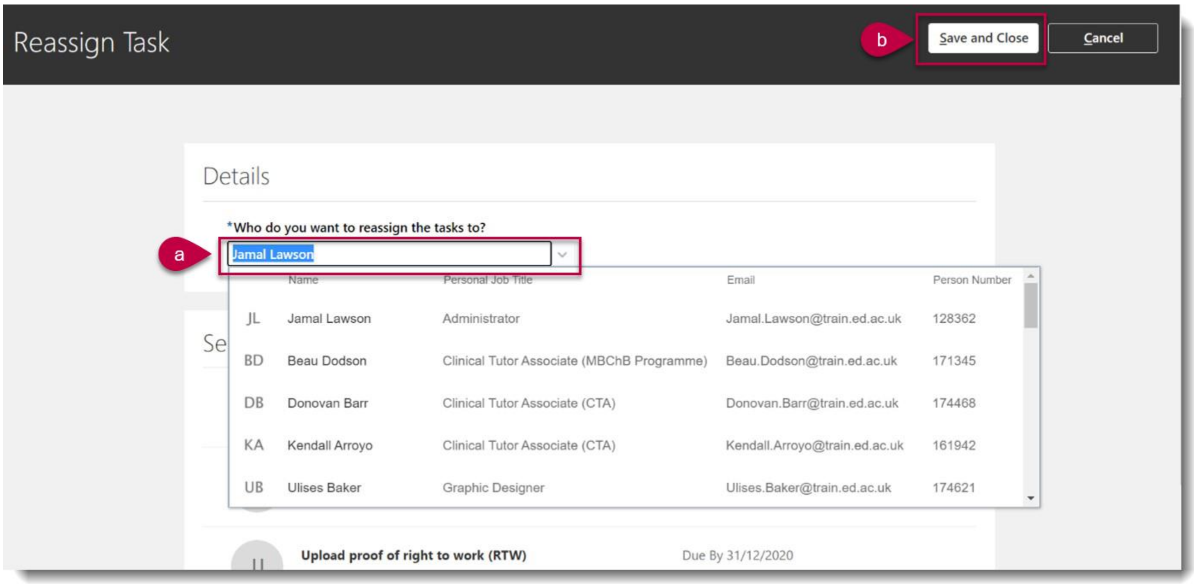
2. On the **My Tasks** tab, search for the employee by name.



3. Tick all tasks that are to be reassigned. Click on **Actions** and select **Reassign Task**.

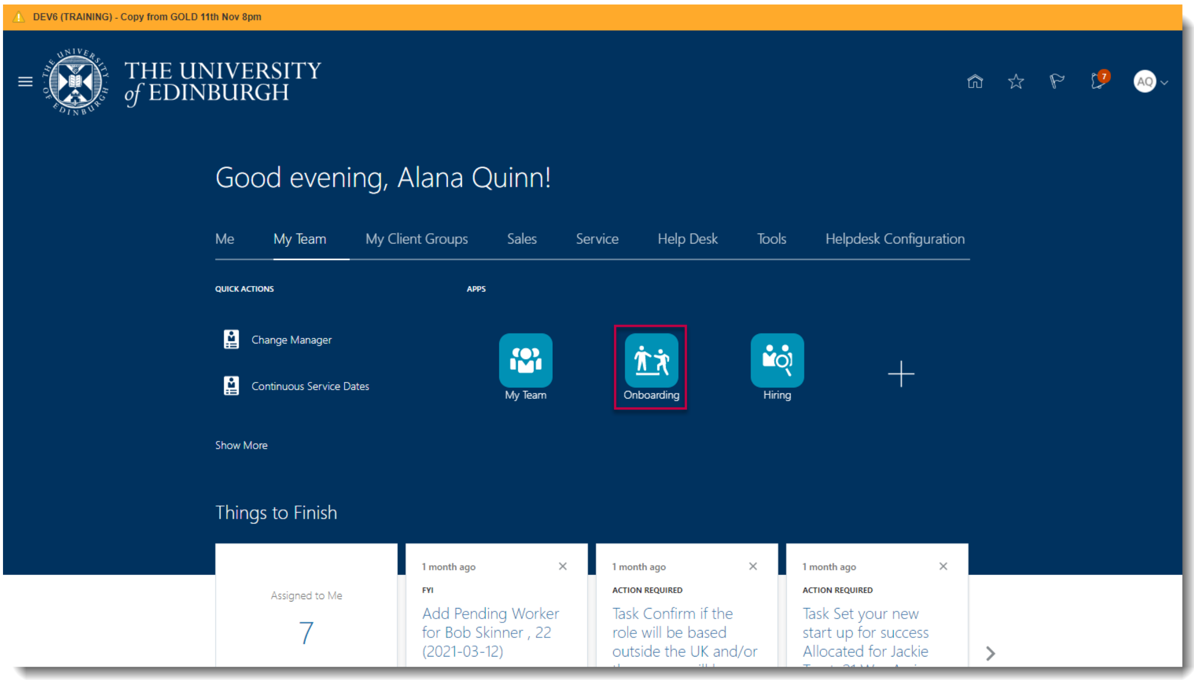


4. Search for and select the person to whom you want to reassign the tasks. Click **Save and Close**. The reassigned tasks will now be available to view in **Others' Incomplete Tasks**.

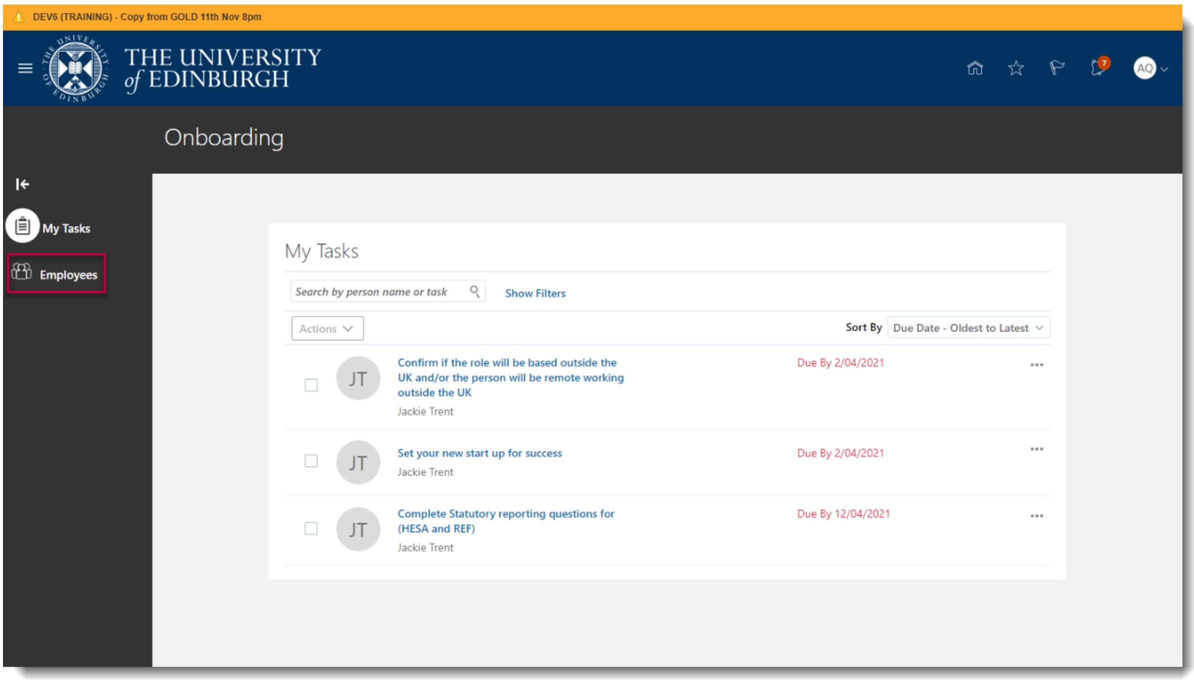


Reassignment of Other's Checklist Tasks (new hires and rehires)

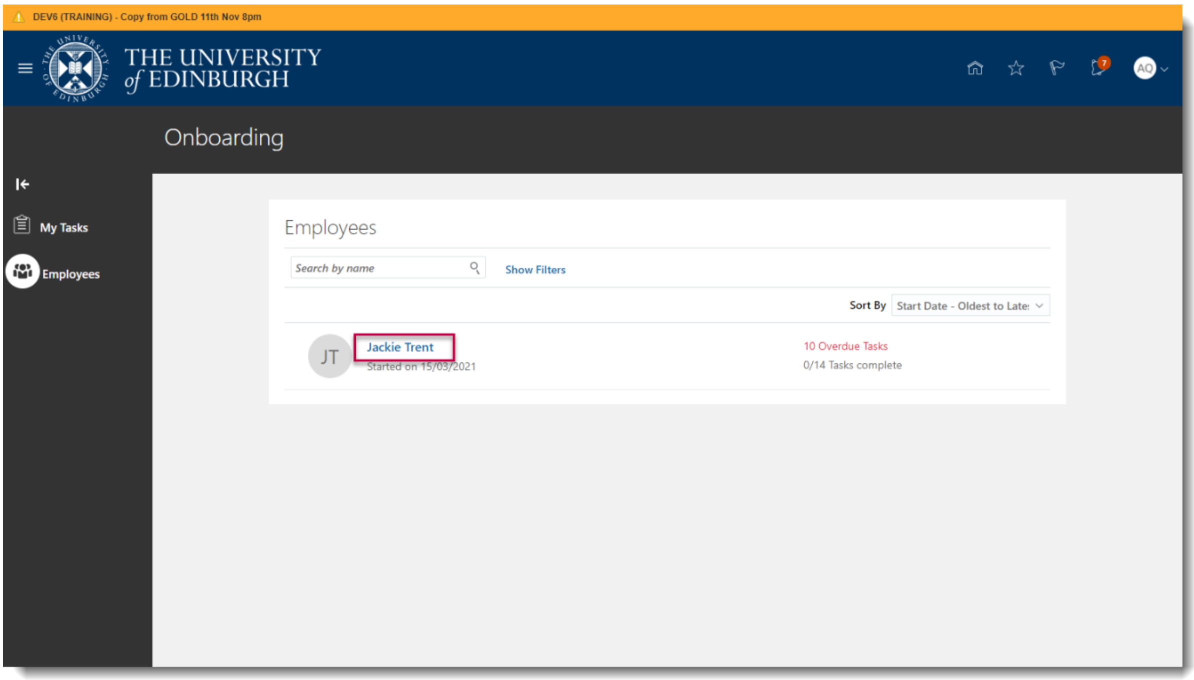
1. From the Home page click **My Team/My Client Groups**. Select the **Onboarding** App



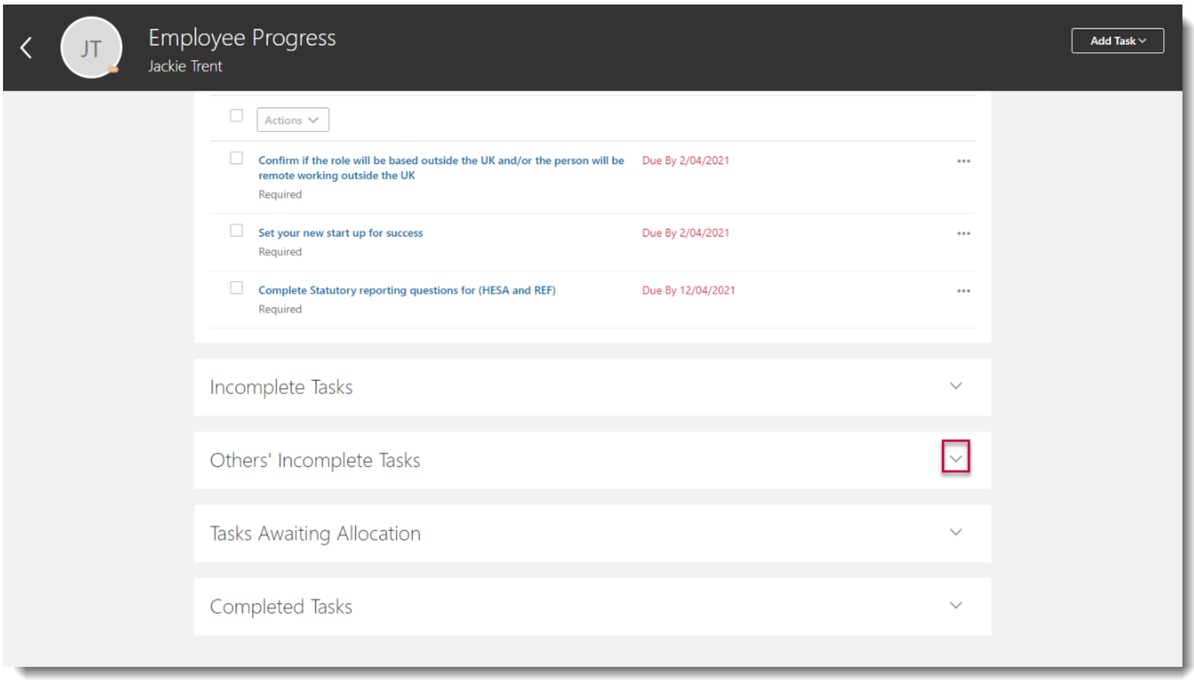
2. Select the **Employees** tab



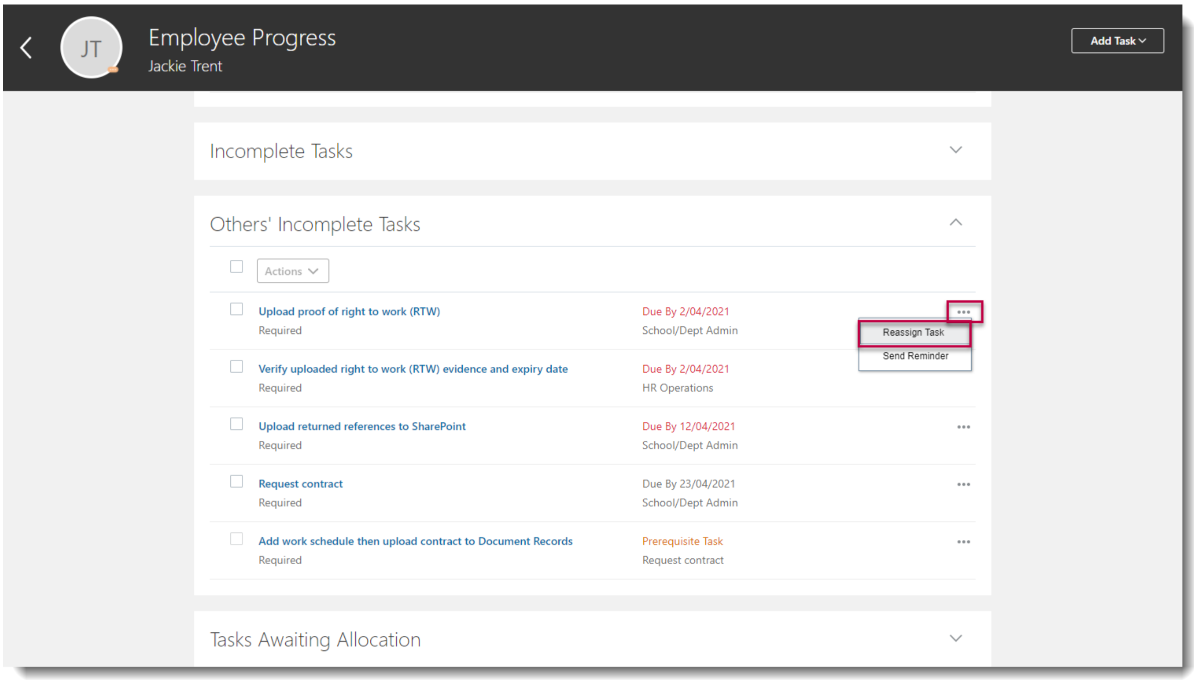
3. Select the Employee/Pending Worker whose tasks you wish to reassign



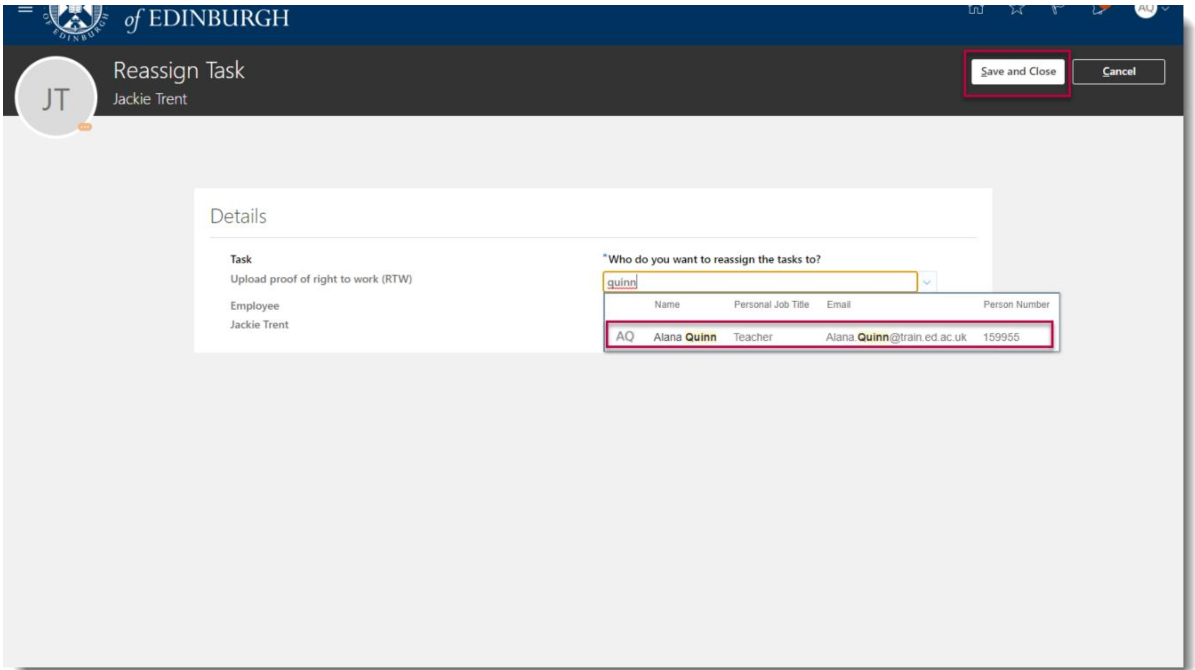
4. Scroll to, and expand, the **Others' Incomplete Tasks** section



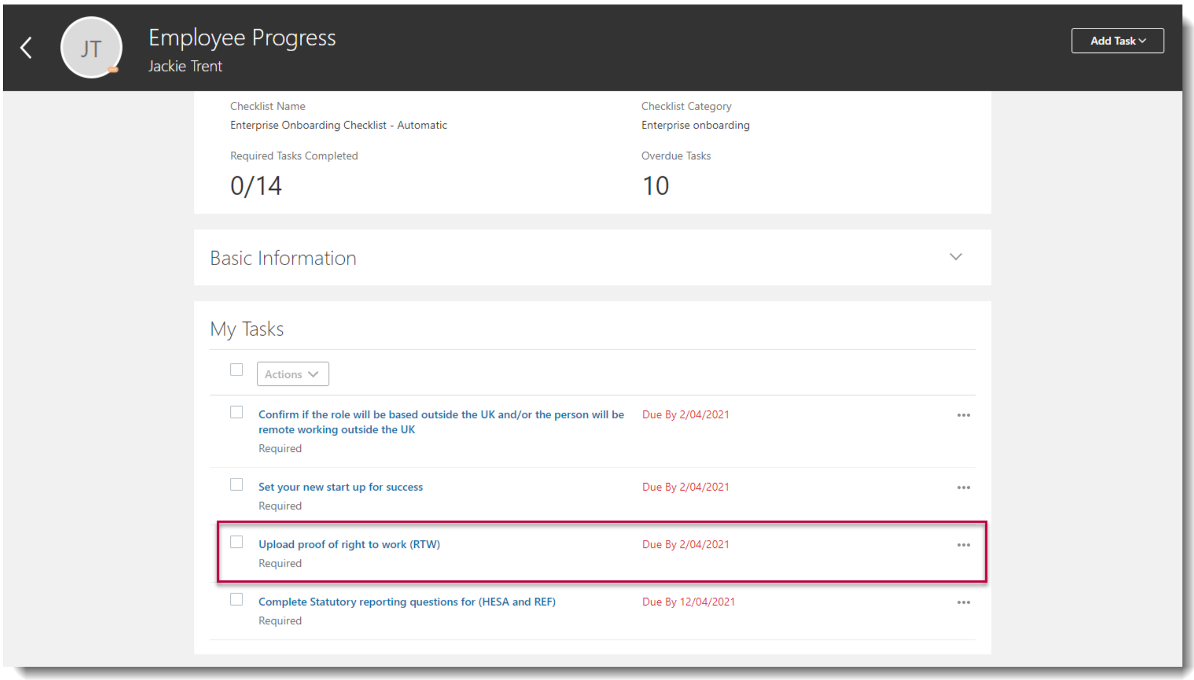
5. Click the **Ellipsis** to the right of the task you wish to reassign then select **Reassign Task**



6. Search for the person you wish to reassign the tasks to in the **Who do you want to reassign the tasks to?** field then click **Save and Close**



7. If you have assigned the task to yourself it will appear in the **My Tasks** menu. If you have assigned it to someone else, you will see it listed as a task for that employee in the **Others' Incomplete Tasks** Section



Transfers, Additional Posts and Internal Secondments

The Hiring Team must ensure that the Internal moves/additional posts-manual checklist has been **manually assigned** to the employee transferring, taking on an additional post or internal secondment for advertised posts. For non- advertised posts the checklist will be assigned by HR Operations upon receipt of the Request for Transfer, Additional Post or Secondment form.

However, when a checklist is assigned **before** the start date for a transfer, additional post or internal secondment this will allocate tasks to the successful candidate's current primary assignment line manager and representatives (such as SDA). The tasks must be reassigned to enable the hiring manager / SDA to complete the appropriate onboarding tasks.

One important task is the ‘Request for contract (internal hire)’, which when completed alerts HR Operations to generate the employment contract and upload this for the employee to review and e-sign. For non- advertised posts, HR Operations will delete this task and issue the contract or secondment letter upon receipt of the request for Transfer, Additional Post or Secondment form.

Checklists should be allocated at the point the offer is accepted, following the steps below:

1. Check with the employee they have notified their primary line manager that they have been successful for a new assignment. (The employee can

identify their primary line manager in People and Money by going to Me>Personal Information>Employment Info).

2. You can 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 pm-_1138-_employee_guide_-_how_to_view_and_search_the_employee_directory.pdf (ed.ac.uk).

3. Follow the appropriate route as per the table below:

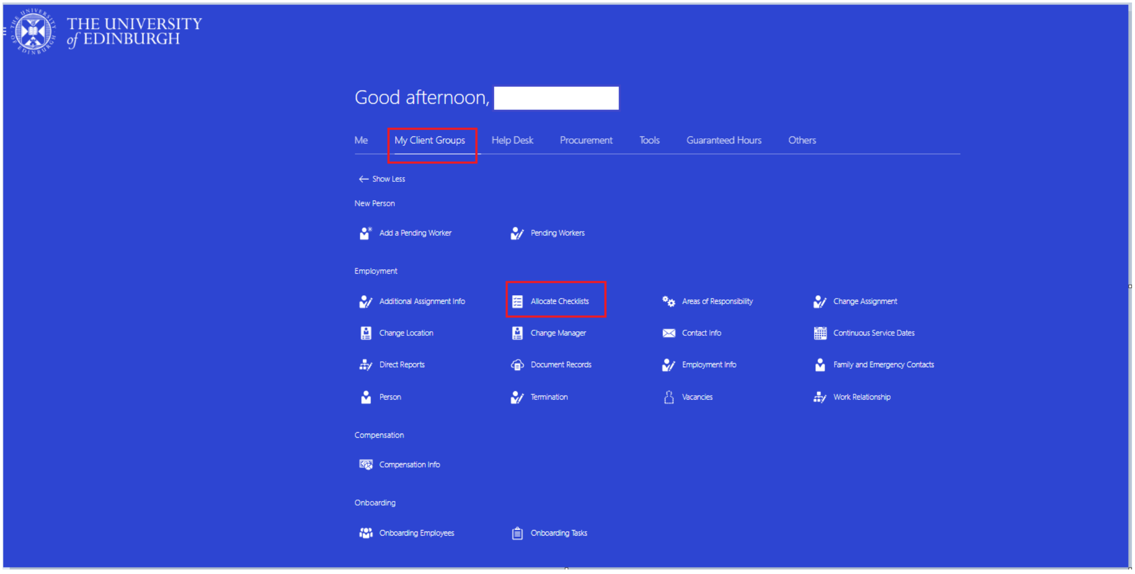
Scenario	Action
Transfer to Advertised Post (and only holds one post with UoE)	Hiring teams can allocate the checklist but this will be assigned to the employee's current line manager. Please contact their current line manager / SDA to reassign the tasks using the email template.
Additional Post - Advertised (staff that already hold multiple posts or taking the new role as an additional assignment)	Contact the HR Helpline by raising a Service Request using the category Resourcing and they will allocate the checklist and reassign the tasks to you.
Internal Secondment (Advertised Post)	Hiring teams can allocate the checklist but this will be assigned to the employee's current line manager. Please contact the line manager / SDA for their current post to reassign the tasks using the email template. The request for contract task must be completed as this prompts HR Operations to generate the secondment letter.
Transfer, Additional Post or Internal Secondment (**Non-Advertised** Post)	HR Operations will allocate the checklist upon receipt of the Request for Transfer, Additional Post or Internal Secondment form. In this scenario the request contract task will be removed as HR Operations will issue the contract/ secondment letter upon receipt of the form.

4. Once the tasks have been reassigned complete the tasks, in particular the request for contract (internal hire) task which provides HR Operations with the information needed to issue a contract for the transfer or additional post.

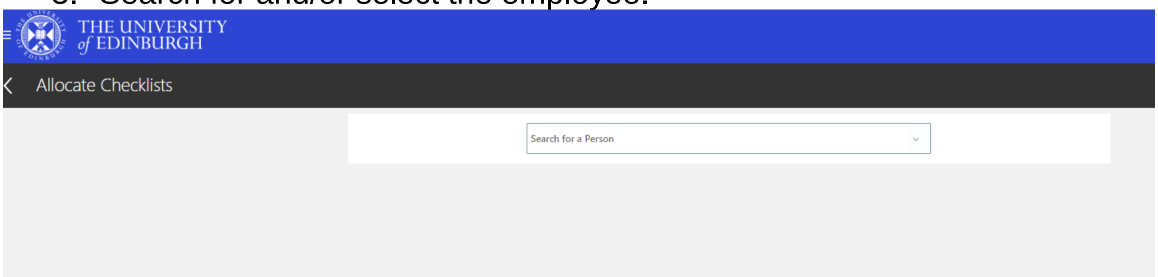
Allocation and Reassignment of Tasks for a Transfer, Additional Post or Internal Secondment

To Allocate a checklist:

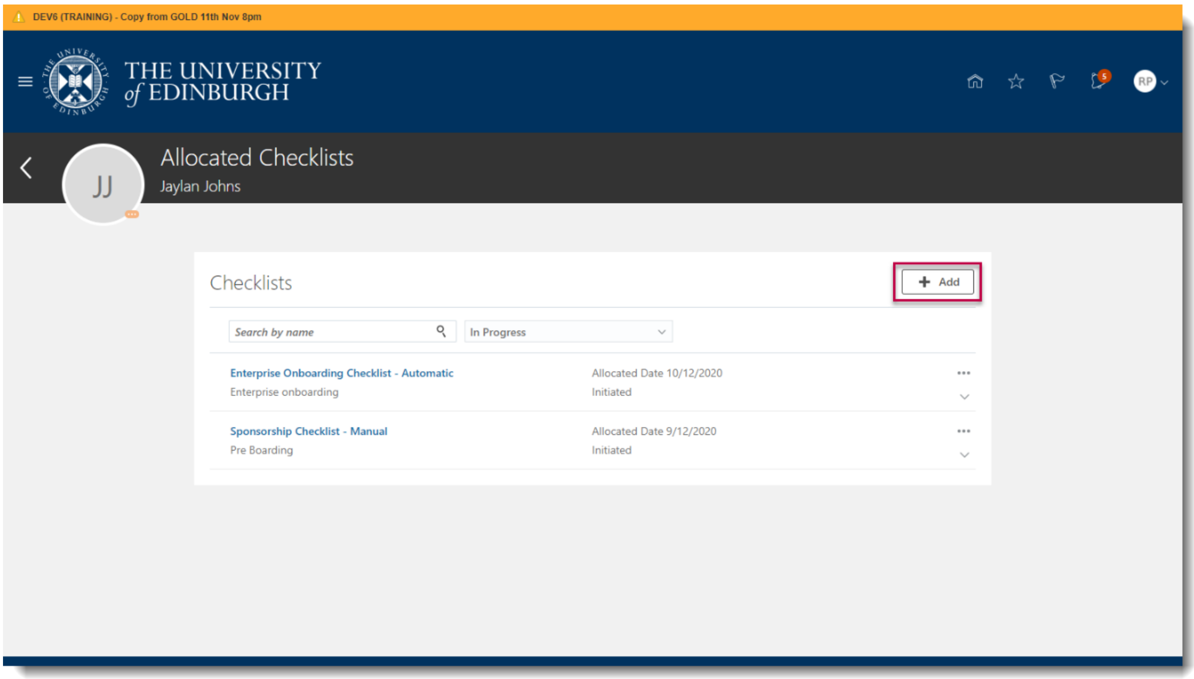
1. From the Home page click **My Client Groups (for SDA's)** or **My Team (for Line Managers)**
2. Go to **Show More** and select **Allocate Checklists.**



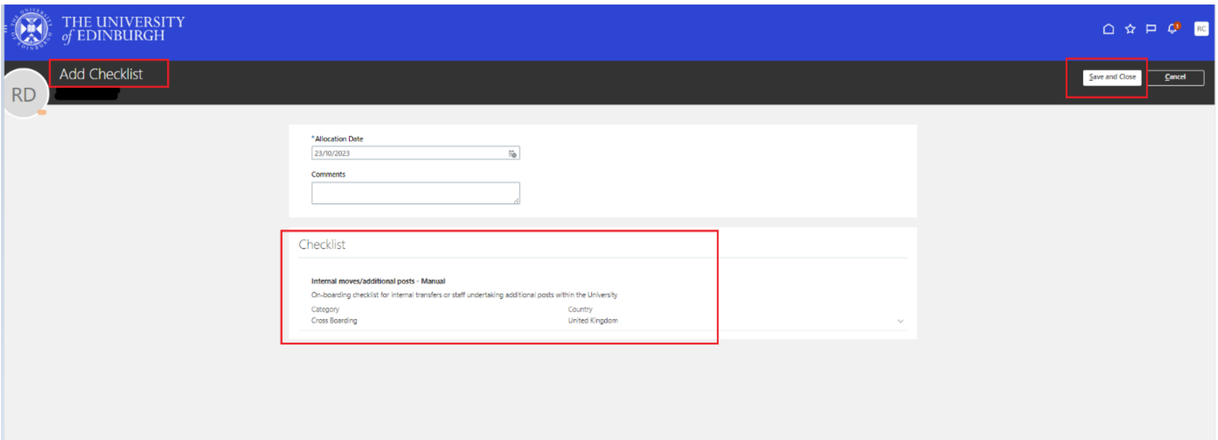
3. Search for and/or select the employee.



4. Click on **Add** button.

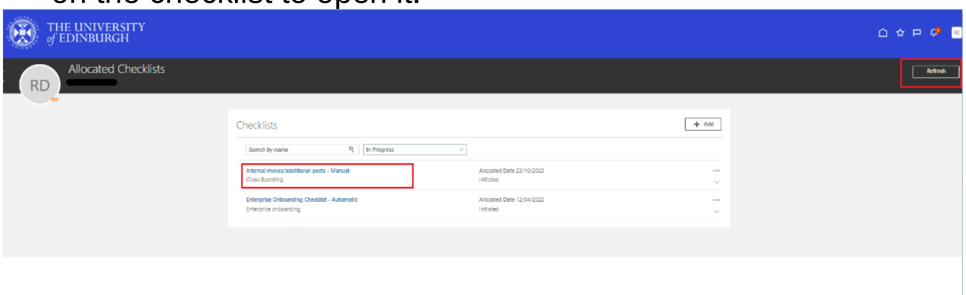


5. Search for the "internal moves/additional posts - manual checklist". Select the checklist and then select **Save and Close.**

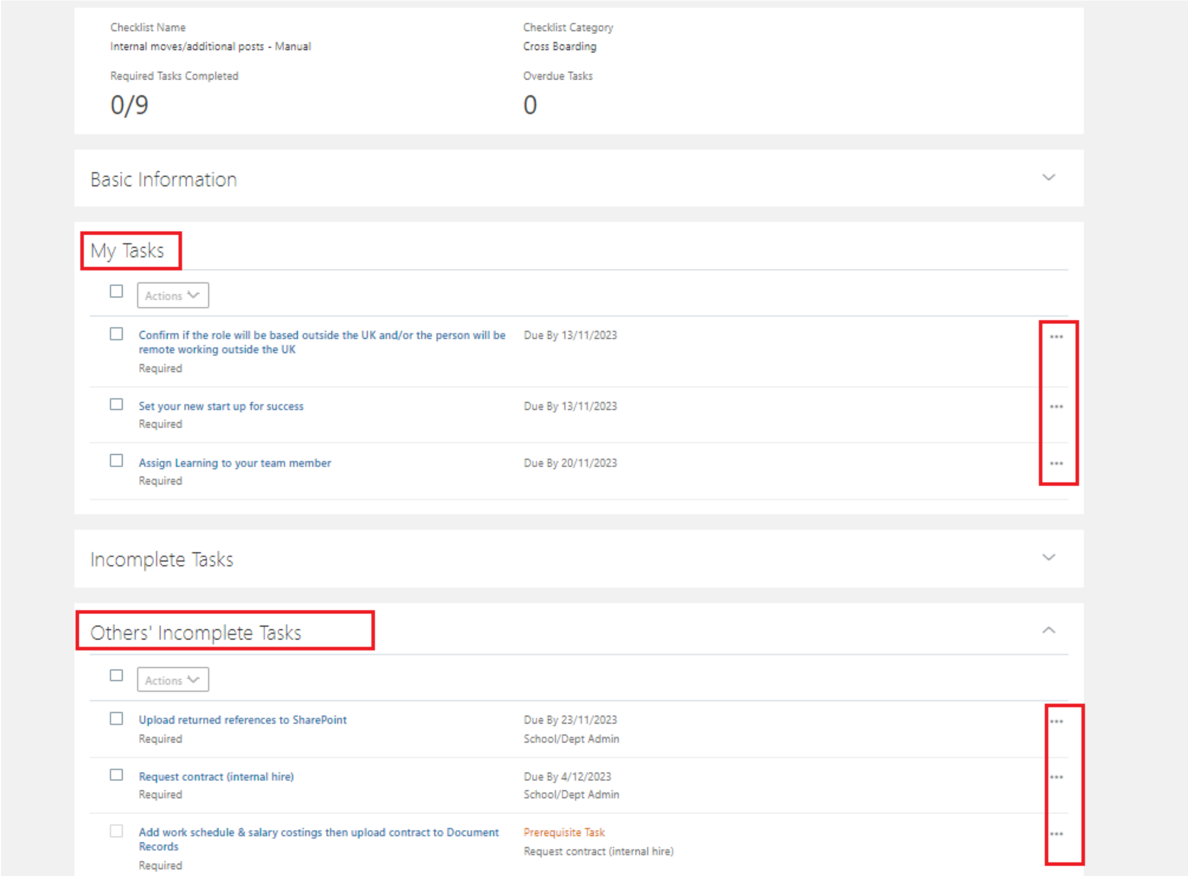


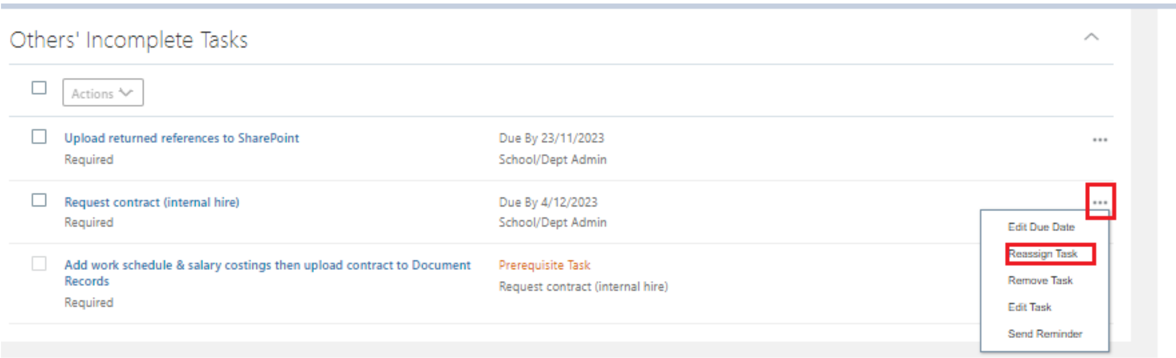
To Reassign the Tasks (current line manager task)

6. The checklist will now be available in the list of **Allocated Checklists**. If it does not appear after 60 seconds click the refresh button. Once available, click on the checklist to open it.

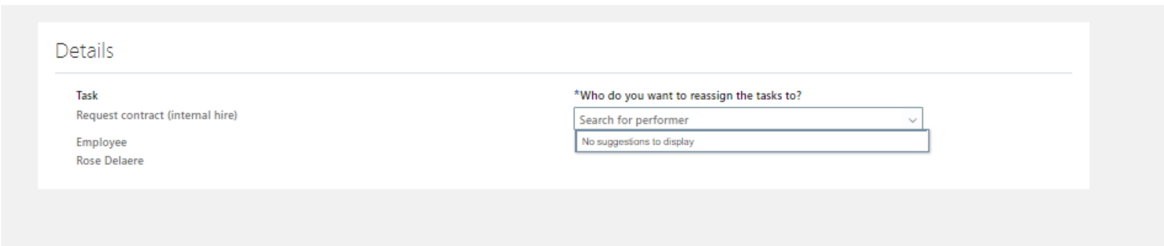


7. Under section **'My Tasks'** and **'Others Incomplete Tasks'** click on the ellipsis **next to each task** and select reassign task





8.Type the name of the person you wish to allocate the tasks to and click **save and close**. The tasks will now be reassigned.



Example Email for use by Hiring Teams

You can use this template email to request that the internal moves checklist is allocated and the tasks reassigned.

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 allocate the Internal Moves/Additional Posts internal onboarding checklist in People and Money and reassign the tasks to <<Name>> by following the steps below:

To Allocate a checklist:

1. From the Home page click **My Client Groups (for SDA's)** or **My Team (for Line Managers)**
2. Go to **Show More** and select **Allocate Checklists.**
3. Search for and/or select the employee.
4. Click on **Add** button.
5. Search for the "internal moves/additional posts - manual checklist". Select the checklist and then select **Save and Close.**

To Reassign the Tasks:

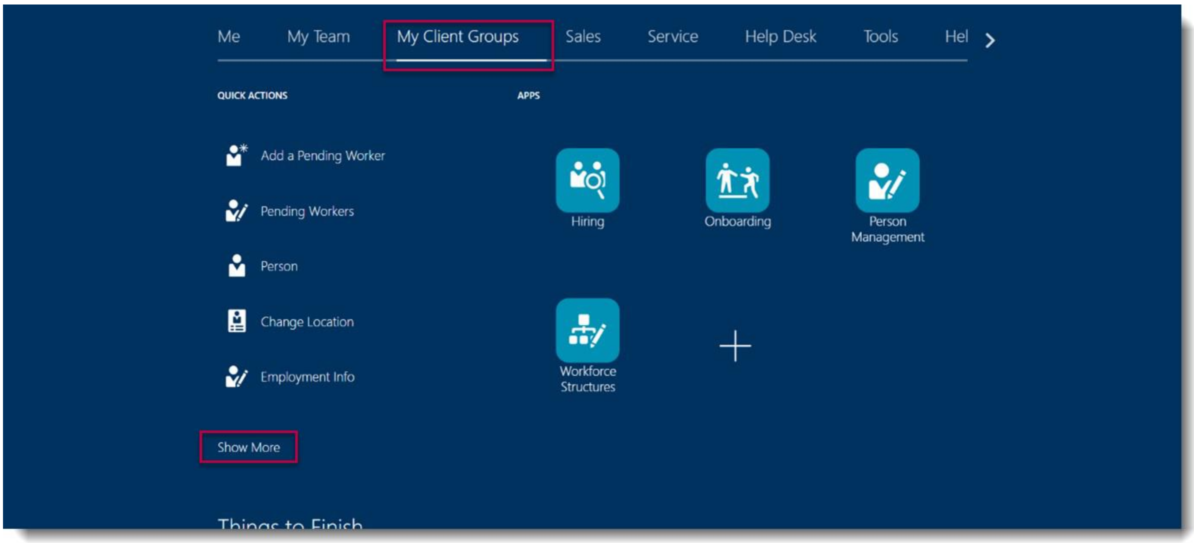
6. The checklist will now be available in the list of **Allocated Checklists**. If it does not appear after 60 seconds click the refresh button. Once available, click on the checklist to open it.
7. Under section **'My Tasks'** and **'Others Incomplete Tasks'** click on the ellipsis **next to each task** and select reassign task
8. In the Details 'Who do you want to reassign the tasks to' type the name of the person that has requested the tasks be reassigned to, then **Save and Close.**

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

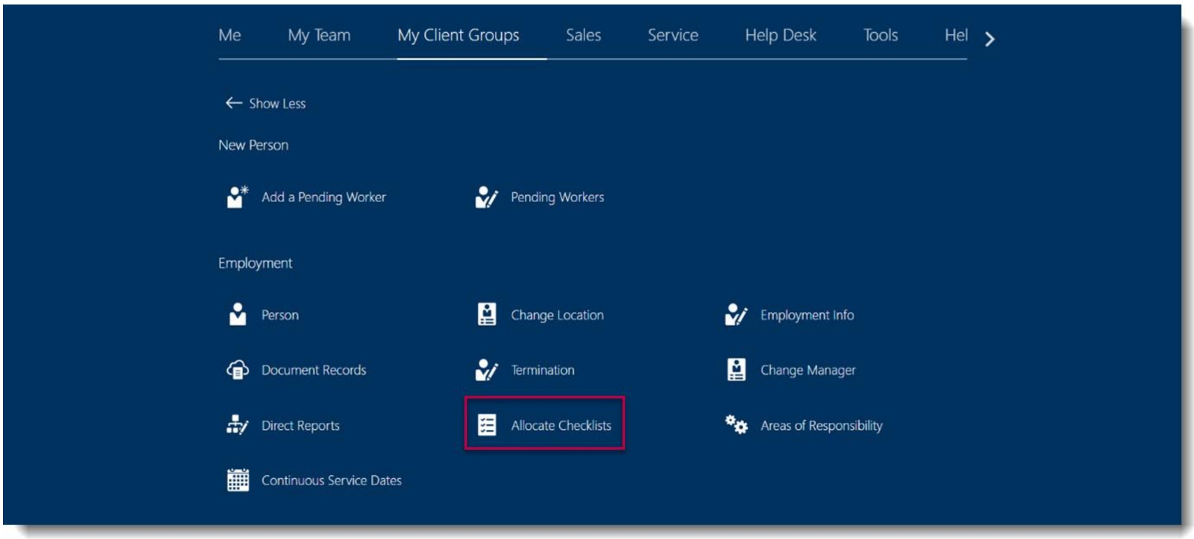
Other Useful Information

Edit an Existing Checklist

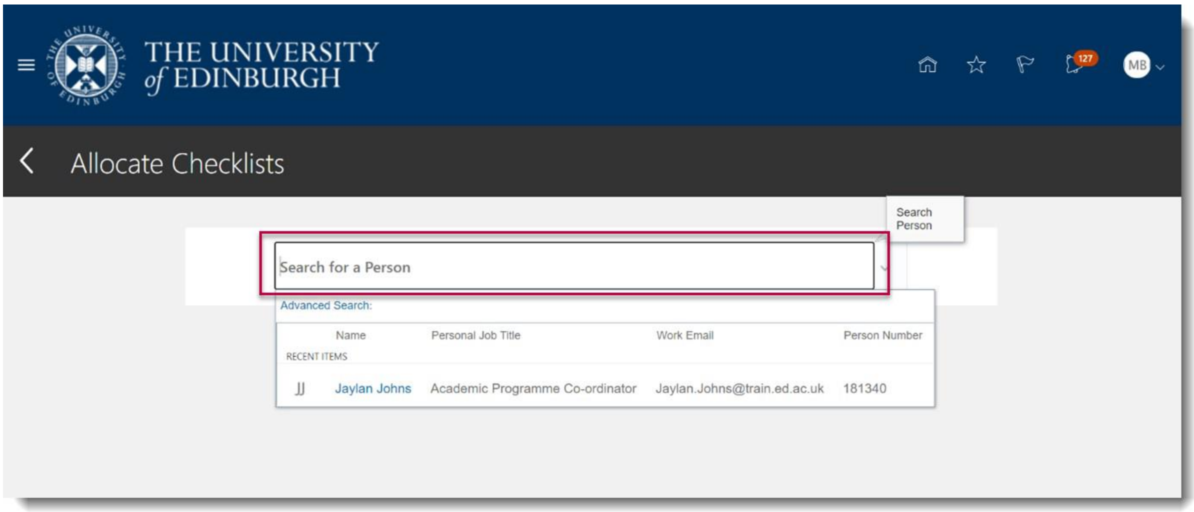
1. To edit an existing checklist, go to **My Client Groups** and **Show More**.



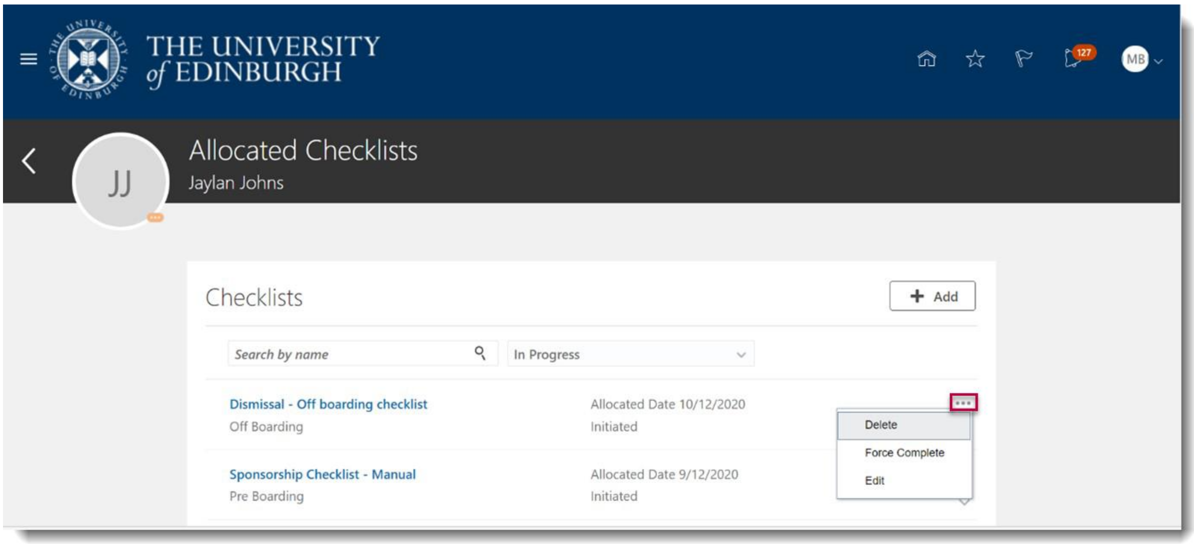
2. Select **Allocate Checklists**.



3. Search for and select the employee.



4. To edit an entire checklist, click on the **ellipsis.**

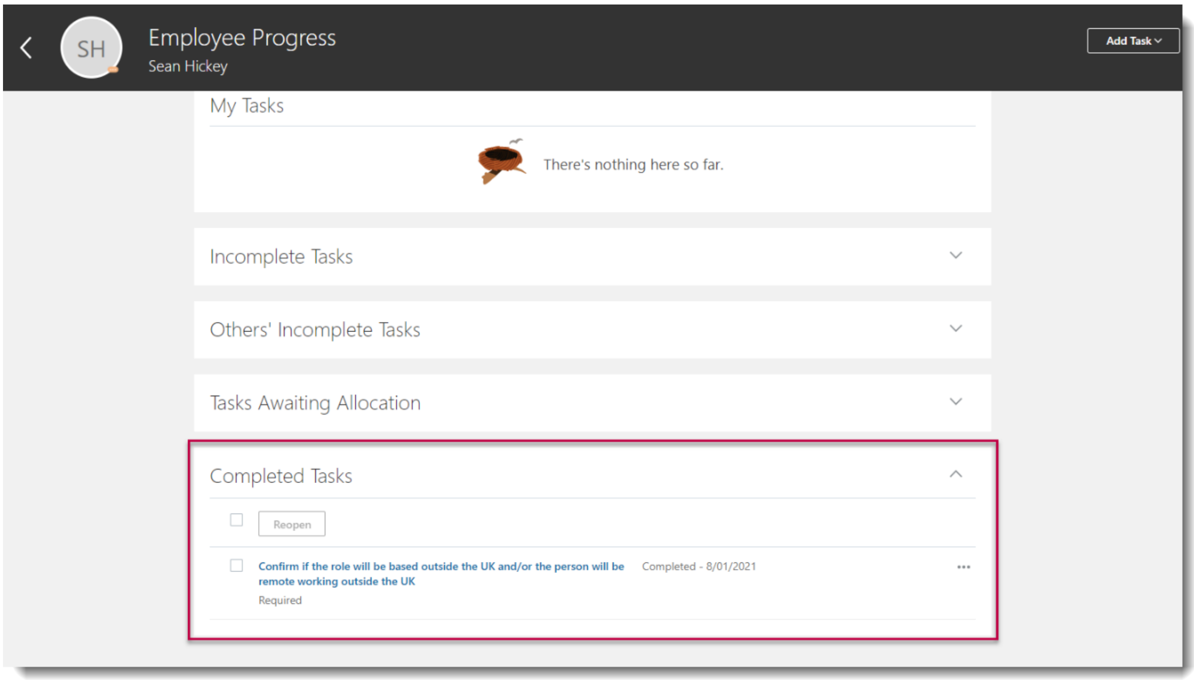


- **Delete** – select Delete to remove the entire checklist from the employee. This does not remove any data that has been entered for completed tasks within the checklist.
- **Force Complete –** this option allows you to you mark the checklist as complete and will force close all the open tasks.
- **Edit** – Individual tasks can be assigned as required from the task library to assign part of a checklist. This would be recommended rather than selecting this option to edit tasks from a checklist.

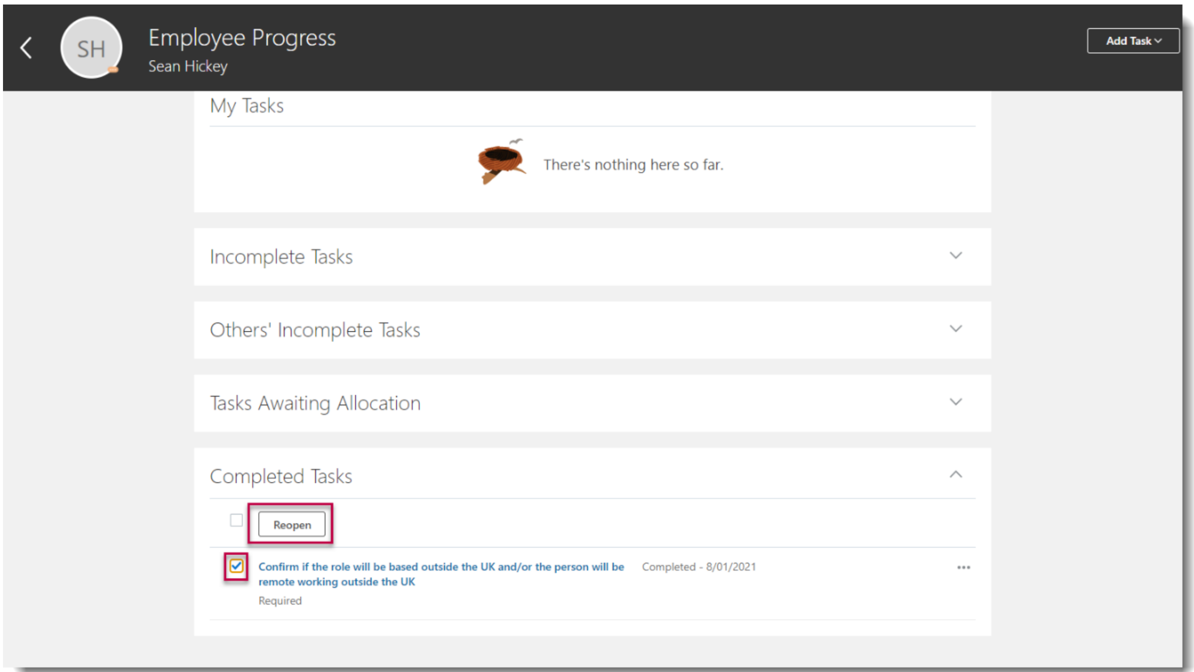
Reopening a Task

If a task has been marked as complete in error, it can be reopened using the reopen action.

1. In the employee progress page, scroll to **Completed Tasks**



2. Select the checkbox to the left of the task you wish to reopen and click **Reopen**



The task will then move back to the incomplete tasks section for the automatically assigned role i.e. if this was your task as a school/dept. administrator it would return to Incomplete Tasks. If this was assigned to another user, it would return to display in Others' Incomplete Tasks.

Appendices – Checklists in Detail

The tables provided in this Appendix contain lists of the tasks attached to each checklist and the following information:

- **Task Name - Task Name** is displayed to users.
- **Required? – Tasks** that must be completed before **Checklist** can be marked as **Complete.**
- **Performer -** Person responsible for completion of **Task.**
- **Owner -** Person responsible for ensuring **Task** completion. Task owners can review task allocation details.
- **Preceding Task –** A **Task** that must be completed prior to the completion of another. **Task** (e.g. **Request Contract** must be completed before **Upload contract to Document Records**).

Checklist Name	Checklist Description
Enterprise Onboarding Checklist – Automatic	It includes: 1. **Generic Pre-boarding Checklist** – automatically assigned to all Pending Workers. Requires manual assignment for rehires. 2. **Day 1-90 Checklist** - provisioned from the new hires start date Details of the tasks related to each Checklist are provided below.

Generic Pre-boarding Checklist

Task Name	Required?	Performer	Owner	Preceding Task
Welcome to the University of Edinburgh	No	Worker	SDA	
Upload Proof of Right to work (RTW)	Yes	SDA	Line Manager	
Set your new start up for success	Yes	Line Manager	SDA	

Task Name	Required?	Performer	Owner	Preceding Task
Getting Paid – Enter your bank Details	Yes	Worker	Payroll	
Request contract	Yes	SDA	Line Manager	
Upload returned references to SharePoint	Yes	SDA	SDA	
Confirm if the role will be based outside the UK and/or the person will be remote working outside the UK	Yes	Line Manager	HR Ops	
Complete Statutory reporting questions for (HESA and REF)	Yes	Line Manager	SDA	
Input Emergency Contact Info	Yes	Worker	SDA	
Add Work Schedule and salary costings then upload contract to document of record	Yes	HR Ops	SDA	Request Contract
Your contract is ready to eSign	Yes	Worker	SDA	Add Work Schedule and salary costings then upload contract to document of record
Getting your first staff card	No	Worker	SDA	

Day 1-90 Checklist

Task Name	Required?	Performer	Owner	Preceding Task
Steps to take if your new hire did not turn up	Yes	Line Manager	SDA	
Tell us about your joining experience	No	Worker	HR Ops	
Probation review Required	No	Line Manager	Initiator	
Settling in and making the most of your onboarding experience	No	Worker	Line Manager	
Review your personal details and complete Equality, Diversity and Inclusion Information	Yes	Worker	SDA	Welcome to UoE
Complete further questions relating to Equality, Diversity and Inclusion	Yes	Worker	HR Ops	Welcome to UoE
Check your bank details for your salary are correct	Yes	Worker	Payroll	
Review and update your skills and qualifications	Yes	Worker	Line Manager	
Assign learning to your team member	Yes	Line Manager	Line Manager	
Complete your expected learning	Yes	Worker	Line Manager	
Provide your tax information for HMRC	Yes	Worker	Payroll	

NHS Honorary Cover Checklist

Checklist Name	Checklist Description
NHS Honorary Cover - Manual	Checklist to be manually assigned for roles that require NHS Honorary cover.

Task Name	Required?	Performer	Owner	Preceding Task
Complete your online NHS Occupational Health assessment	Yes	Worker	HR Co-Ordinator	
Complete and return NHS Form A (Medical Doctors) or B (Nurses/Midwifes/ Researchers and others (Non-Research & Development)	Yes	Line Manager	HR Co-Ordinator	
eSign consent to share Disclosure information with the NHS	Yes	Worker	HR Co-Ordinator	
Upload confirmation of professional indemnity insurance (Doctors/Dentists)	Yes	Worker	HR Co-Ordinator	
Complete and return NHS IT Declaration Form	Yes	Worker	HR Co-Ordinator	
Complete HESA clinical person data	Yes	HR Co-Ordinator	HR Co-Ordinator	
Please complete your PVG application and return it	Yes	Worker	HR Co-Ordinator	
Upload a copy of your most recent payslip along with a scanned signed and dated CV	Yes	Worker	HR Co-Ordinator	

Skilled Worker Checklist

Checklist Name	Checklist Description
Skilled Worker Checklist - Manual	Checklist for international new hires requiring Sponsorship. Manually added to required employees.

Task Name	Required Task?	Performer	Owner	Preceding Task
Submit certificate of sponsorship (COS) request form to HR	Yes	SDA	Line Manager	
Upload Certificate of Sponsorship COS) confirmation letter	Yes	HR Ops	HR Ops	
For information: COS application processed	No	SDA	Line Manager	Upload Certificate of Sponsorship (COS) confirmation letter
Here is your Certificate of Sponsorship (COS) number	Yes	Worker	SDA	Upload COS confirmation letter to Document of record.
Review and eSign terms of Interest Visa Loan.	No	Worker	SDA	Here is your Certificate of Sponsorship (COS) number
Submit your interest visa loan application	No	Worker	SDA	Review and e-sign terms of interest visa loan.
Visa Loan applications needs processing for new hire	No	HR Ops	HR Ops	Submit your interest free visa loan application
Confirm when you have received your Visa and let us know the start date	Yes	Worker	SDA	Here is your Certificate of Sponsorship (COS) number
Visa Received: What needs to happen before day 1	Yes	SDA	Line Manager	Confirm when you have received your Visa and let us know the start date
Entering the UK and preparing for your arrival	Yes	Worker	SDA	Confirm when you have received your Visa and let us know the start date

Task Name	Required Task?	Performer	Owner	Preceding Task
Upload Verified copies of Visa (vignette) or online PDF and Passport	Yes	SDA	Line Manager	Confirm when you have received your Visa and let us know start date
Sponsorship Responsibilities during employment	Yes	Worker	Line Manager	Upload verified copies of visa(vignette) or online PDF and Passport
Manager responsibilities for Sponsored Staff		SDA	Line Manager	Upload Verified copies of Visa (vignette) or online PDF and Passport
Input COS number and standard occupational classification (SOC) codes	Yes	HR Ops	HR Ops	Upload COS confirmation letter to Document of Record

Health Job Hazard Checklist

Checklist Name	Checklist Description
Health Job Hazard Checklist - Manual	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.

Task Name	Required?	Performer	Owner	Preceding Task
Complete job hazards evaluation	Yes	Line Manager	SDA	
Complete mandatory health and safety training courses - Role specific	Yes	Worker	Line Manager	
Follow key job hazards plan to ensure staff member is directed to all applicable resources	Yes	Line Manager	SDA	Complete job hazards evaluation
PVG check required	Yes	HR Ops	SDA	
Complete counter Terrorism check by Security advisers.	Yes	HR Ops	SDA	
Disclosure Scotland check required	Yes	HR Ops	SDA	
Complete your Basic Disclosure Scotland check	Yes	Worker	HR Ops	
Please complete your PVG application and return it	Yes	Worker	HR Ops	

Internal Moves/Additional Post Checklist

Checklist Name	Checklist Description
Internal moves/Additional Posts - Manual	Checklist for Internal movers or undertaking additional posts within University

Task Name	Required?	Performer	Owner	Preceding Task
Assign learning to your team member	Yes	Line Manager	Line Manager	
Complete your suggested learning	Yes	Worker	Line Manager	Assign learning to your team member
Add Work Schedule and salary costings then upload contract to document of record	Yes	HR Ops	SDA	Request Contract
Request contract (internal hire)	Yes	SDA	SDA	Confirm employee start date And Work Schedule
Upload Returned references to SharePoint	Yes	SDA	SDA	
Upload contract to Document Records	Yes	HR Ops	SDA	Request contract
Confirm if the role will be based outside the UK and/or the person will be remote working outside the UK	Yes	Line Manager	SDA	
Your contract is ready to eSign	Yes	Worker	SDA	Upload contract to document records
Things to finish in your current role	Yes	Worker	SDA	
Are your personal details still up to date?	Yes	Worker	SDA	
Set your new start up for success	Yes	Line Manager	SDA	e-signature of contract

Arcadia Checklist

Checklist Name	Checklist Description
Arcadia - Automatic	Checklist for new staff joining Arcadia - automatically assigned for Arcadia staff only

Task Name	Required?	Performer	Owner
Upload proof of Right to Work (RTW)	Yes	SDA	Line Manager
Are your personal details and contact information up to date?	Yes	Worker	SDA
Getting Paid – Enter your bank details	Yes	Worker	Payroll
Provide your tax information for HMRC	Yes	Worker	Payroll
Input Emergency contact information	Yes	Worker	SDA