People and Money system

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New Hire Guide- How To Complete Onboarding Tasks

What this guide covers:

**Overview - Completing Onboarding Tasks**

**Completing ‘Getting Paid-Enter your bank details’ task**

**Completing ‘Provide your tax information for HMRC’**

**Before you start:**

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

**Important:** So that we can pay you correctly there are tasks that you must complete to provide your UK Bank Details and Tax Information for HMRC, this information must be provided and the tasks completed by the end of day one of employment, please note:

- If you are new to the University you must provide your UK bank details
- Anyone returning to the University must check that the bank details provided previously are still correct
- **Failure to provide/check your bank details on day one may result in a delay to your first pay being received**
- It is also necessary for you to provide your tax information for HMRC, you can upload a copy of your P45, if you do not have a P45 you must complete the new starter declaration. If you do not complete this task you might end up being put on emergency tax code or paying too much tax.
- Staff on guaranteed hours contracts - you must have entered or checked these details on day one of employment at the latest. It is important you do not wait to provide this until you are making a claim for hours worked.

Detailed guidance on these tasks is provided in the sections ‘Entering your bank details’ and Entering your tax information below.
It is important that you complete all Onboarding tasks assigned to you as soon as possible.

The task ‘Your contract is ready to sign’ may appear greyed out or locked when you first gain access to People and Money. You will be notified via email and an in-system notification when this is available to be signed and uploaded.

If you experience any issues in completing any onboarding tasks please email HR helpline at hrhelpline@ed.ac.uk.
Overview – Completing Onboarding Tasks

This is a simple overview of the process, each task is different and step by step instructions are available within each task. Please read the instructions contained within each task carefully before you start.

Completing Onboarding Tasks

1. Click the Me link and select the Onboarding App.

2. Scroll to the Tasks to Finish section in the lower part of page.

3. Click on the tile of a task that you would like to carry out. Each task has a due date and can be completed in any order you desire. Some tasks require you to review the...
details only, and others require you to input information or upload documentation. A task tile is removed from the list when you mark it as complete.

4. Read the information within the task. If the button is available, click Go to Task.

5. Complete the fields in the task.

6. If it is necessary to update the information, click the Pencil icon, make the desired changes and click Submit.

7. When a task is finished, return to the onboarding task and mark it as complete. Click the ‘<’ button in the black banner to the left of your initials to return to the Onboarding page and click the Complete button.

8. If the task does not apply, or if you would like to create a reminder to carry out the task later, within the task click Actions and choose the appropriate option.
The following section provides two examples of Onboarding tasks, please ensure you complete all your Onboarding tasks not only those shown below.

Completing ‘Getting Paid - Enter your bank details task’

1. From the Home page, click the Me link and select the Onboarding App.

2. The Onboarding welcome page is displayed and explains there are a number of tasks for you to complete as part of the joining process. Scroll to the lower part of the page review the Tasks to Finish tiles.
3. Click on the tile of a task that you would carry out and review the supporting information. In the example, the Getting Paid - Enter your bank details task is used.

4. Please note this is a two-step process, you must **add your bank details first then select the payment method type**

   Review the supporting information before you open the task, click the **Go to Task** button and (this will open a new window)
5. Click **Add** on the bank accounts section, if you’ve worked for us before you must check your bank details are still correct. You must also select and save the payment method type (see step 8 onwards below). If your details have changed, click on the pencil icon to edit them.

6. Enter the Account Number, the Account Holder (name) and Sort Code, then **click Save**
8. Then Click "+Add" on the **My Payment Methods** section
   a) In the field "What do you want to call this payment method?" add the name of your bank.
   b) Ensure the payment type is set to BACS (it should be already).
   c) Ensure the bank account is your preferred payment account. If blank, select from the drop down.

**Then Click Save.**

8. Once done, your Bank Account details and My Payment methods will be displayed. Please check that these display as you would expect. To return to the onboarding task, click the '<' button in the black banner to the left of your initials to
9. Review your personal details as per the instruction in the task and once done mark the task as complete. If you have finished a task and it remains on the Onboarding page, select the tile to reopen it, and then click the Complete button.

10. When a task is marked as “Complete”, in the Onboarding page the number of tasks completed is updated.
11. If the task does not apply, or if you would like to create a reminder to carry out the task later, within the task click **Actions** and choose the appropriate option.

Provide your Tax Information for HMRC

1. Repeat steps 1 to 3 **Completing Onboarding Tasks**

2. Read the information within the task carefully. **This task has two options.**
3. To complete the new starter declaration click ‘Go to task’ (this opens a new window) and complete the fields on the form. **Click Submit.**

4. Once done, return to the onboarding task and mark it as complete.

**OR To upload a copy of your P45**

a) Expand the Attachments section at the bottom of the page
b) Upload a copy of your P45 by either dragging the file into the attachment section or clicking the arrow and selecting "add file"

c) **Click "Complete"** to save the documents you have uploaded.

10. When a task is marked as “Complete”, in the Onboarding page the number of tasks completed is updated. If you have finished a task and it remains on the Onboarding page, select the file to reopen it, check the information and then click the complete button.
Appendices

Onboarding Tasks to be completed by new hire (as at 13/12/22).

The tasks are split into preboarding (before you start) and onboarding (from day one of employment, the table below summarises the tasks and provides some further information regarding their completion.

<table>
<thead>
<tr>
<th>Preboarding Task Name</th>
<th>When to complete</th>
<th>Further information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome to the University of Edinburgh</td>
<td>Before your first day</td>
<td>A welcome message from the Principal and Vice Chancellor</td>
</tr>
<tr>
<td>Getting Paid – Enter your bank details</td>
<td>Before your first day and no later than day one of employment</td>
<td>This is a two-step process to enter bank details and select the payment method. Both steps must be completed to ensure payment. Task must be marked as complete once actioned.</td>
</tr>
<tr>
<td>Input Emergency contact information</td>
<td>Before your first day</td>
<td>Opportunity to add emergency contact details</td>
</tr>
<tr>
<td>Your contract is ready to sign</td>
<td>As soon as possible and by day one of employment</td>
<td>Note this task may be greyed out until the contract is ready for you to review.</td>
</tr>
</tbody>
</table>

The following tasks will become available from your start date

<table>
<thead>
<tr>
<th>Onboarding Task Name</th>
<th>When to complete</th>
<th>Further Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide your tax information for HMRC</td>
<td>On day one of employment</td>
<td>This task asks for a copy of a P45 to be uploaded or if this is not available the new starter declaration MUST be completed to ensure the new start is put on the correct tax code. The task must be marked as complete once actioned.</td>
</tr>
<tr>
<td>Task</td>
<td>Timeframe</td>
<td>Details</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>--------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Check your bank details for your salary are correct</td>
<td>On day one of employment</td>
<td>Opportunity to check bank details provided previously or enter them if not yet provided and select the payment method. Both steps must be completed to ensure payment. Failure to provide these on or before day one may result in a delay in payment or the new start not being paid. The task must be marked as complete once actioned.</td>
</tr>
<tr>
<td>Settling in and making the most of your onboarding experience</td>
<td>Day one onwards</td>
<td>Information and links to useful University webpages</td>
</tr>
<tr>
<td>Review your Personal Details and complete Equality, Diversity and Inclusion Information</td>
<td>Day one</td>
<td>Review and update your personal details and providing your personal equality information</td>
</tr>
<tr>
<td>Complete further questions relating to Equality Diversity and Inclusion</td>
<td>Day one</td>
<td>Providing your protected characteristics information to the University</td>
</tr>
<tr>
<td>Getting your first staff card</td>
<td>Day One</td>
<td>Information on how to get your staff card and links to how to apply</td>
</tr>
<tr>
<td>Review and update your Skills and Qualifications</td>
<td>Day one onwards</td>
<td>Opportunity to review and update your skills and qualifications</td>
</tr>
<tr>
<td>Complete your expected learning</td>
<td>Day one onwards</td>
<td>Information on expected learning and links to online courses</td>
</tr>
<tr>
<td>Tell us about your joining experience</td>
<td>After 90 days of employment</td>
<td>Online survey about your recruitment and onboarding experience.</td>
</tr>
</tbody>
</table>