



## System User Guide

# Pending Worker/Employee Guide to Journeys

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

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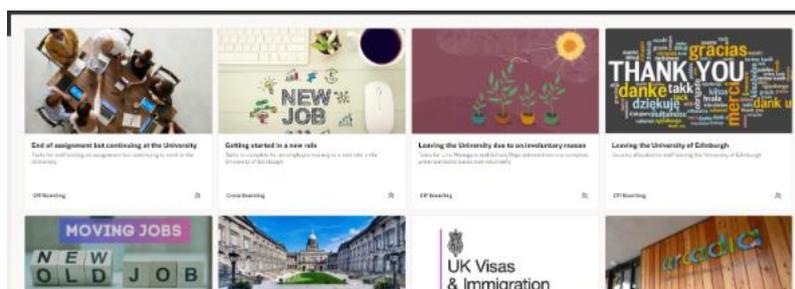
## Introduction

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

A Journey is a collection of tasks that supports the joiner, transfer and leaver processes within the University. Journeys have replaced Onboarding and Leaver Checklists and Tasks (from 24 March 2025). Tasks within the Journey will be assigned to pending worker/employee, Line Managers and School/Department Administrators (SDAs), HR Operations will also receive tasks to complete.

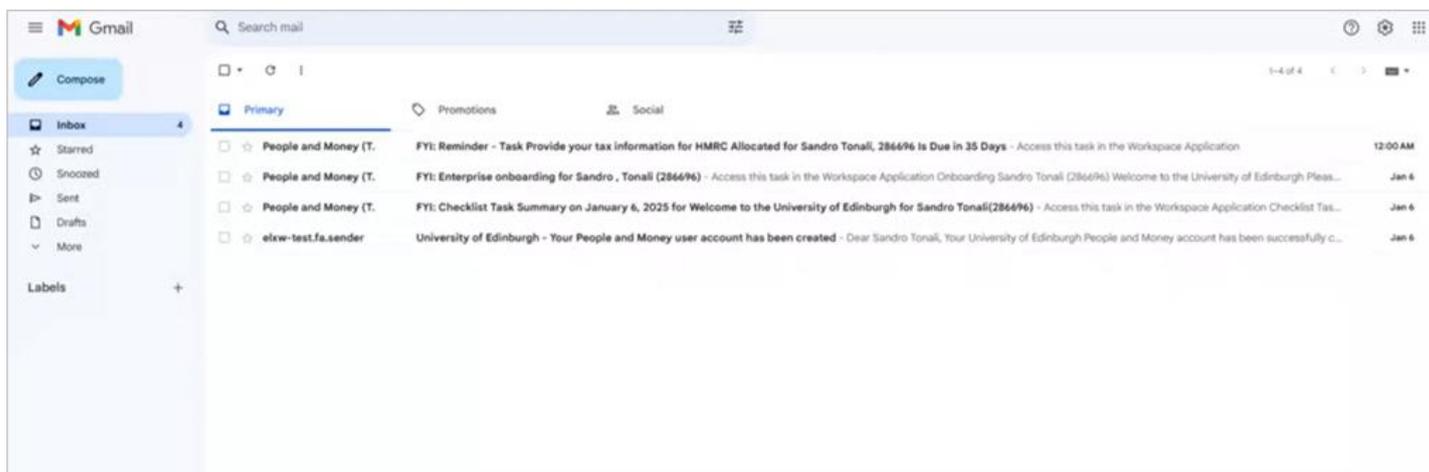
Pending workers and employees will have access to My Journeys and My Tasks within the Journeys app, it is recommended you take action directly from there. You will also be notified of tasks assigned to you and reminded via the notification bell and via email

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



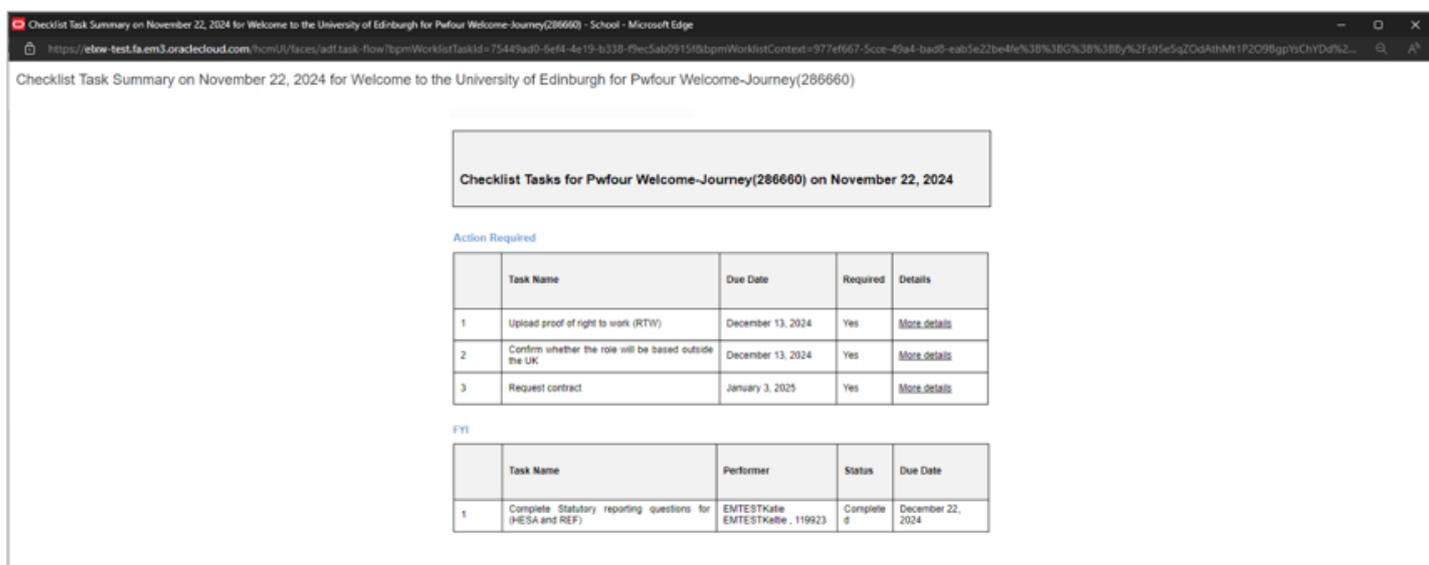
## Notifications and logging in to People and Money

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



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

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



## Important Information for New Starts and anyone Rejoining the University

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

So that we can **pay you correctly** there are tasks that you **must complete** to provide your UK Bank Details and Tax Information for HMRC.

### New Starts

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

## Before Day 1 Task:

|                          |                                                                                                                                                                  |          |     |   |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-----|---|
| <input type="checkbox"/> |  Before Day 1<br><b>Getting Paid - Enter your bank details</b><br>Due in 4 days | Required | ... | ▼ |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-----|---|

## Day 1 Tasks – must be completed on day 1:

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

## Rejoining the University

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

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

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

- If you are new to the University, you must provide your **UK** bank details
- Anyone **returning** to the University **must check** that the bank details provided previously are still correct
- **Failure to provide/check your bank details on day one may result in a delay to your first pay being received**
- It is also necessary for you to **provide your tax information for HMRC**, 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** - must have entered or checked these details on day one of employment at the latest. It is important you **do not wait** until you are making a claim for hours worked to provide this.
- It is important that you complete **all** Onboarding tasks assigned to you as soon as possible.
- The task 'Your contract is ready to sign' may appear greyed out or locked when you first gain access to People and Money. You will be notified via email and an in-system notification when this is available to be signed and uploaded.
- Please follow the detailed steps below to help you navigate and complete tasks in Journeys

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

## Sponsored Workers - Skilled Worker-Certificate of Sponsorship Journey

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

## In Brief

This section is a simple overview and should be used as a reminder. More detailed information on each outcome is provided later in this guide.

## Navigating Journeys

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

## My Journeys

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

## My Tasks

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

## Reviewing and Completing Tasks

1. You will be notified of tasks assigned to you and reminded by email and the notification bell, however you can monitor and take action to complete tasks from **My Journeys or My Tasks**.
2. Each task has a due date and can be completed in any order you desire. Some tasks require you to review the details only, and others require you to input information or upload documentation.
3. Follow the steps within the task, note that some tasks will take you to screens away from People and Money. **You should navigate back to the Task to complete if required.**

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

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

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

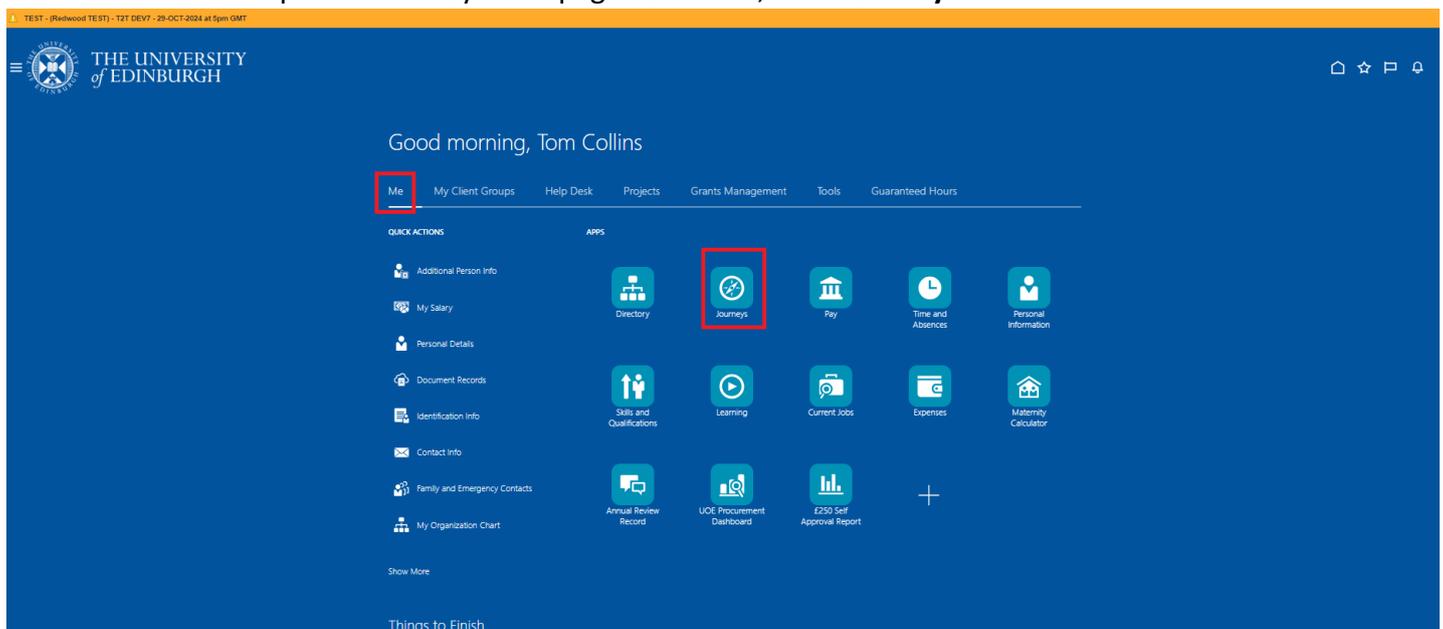
1. From the People and Money homepage select **Me**, then **Journeys**. Navigate to the task ‘Provide your Tax Information for HMRC’
2. Follow the instructions on screen to complete the New Starter Declaration or upload a copy of your P45
3. Once you have uploaded your P45 or completed the new starter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

## In Detail

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

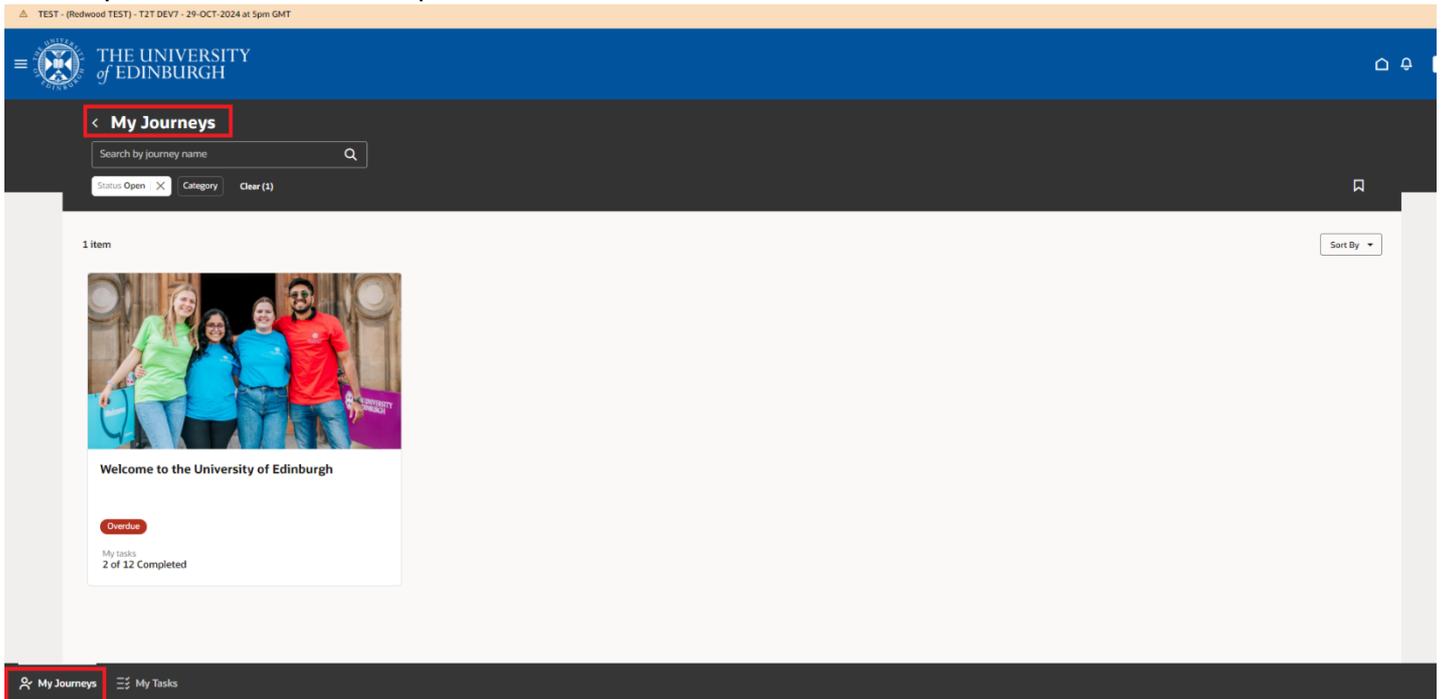
### Navigating Journeys

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

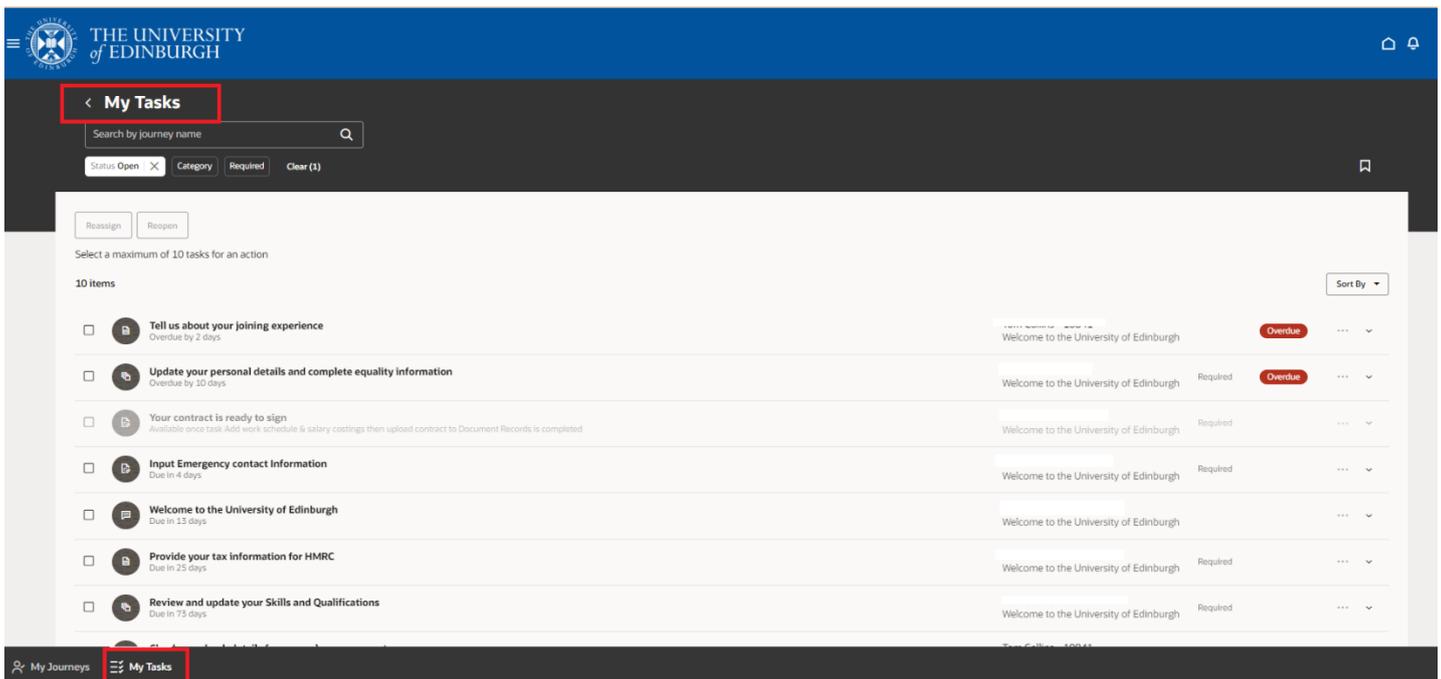


2. Navigation within Journeys depends on the role you have within People and Money. As an Employee you will have access to:

- **My journeys** – This is where you can see Journeys assigned to you as a pending worker or employee, you can review and complete tasks from here.



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



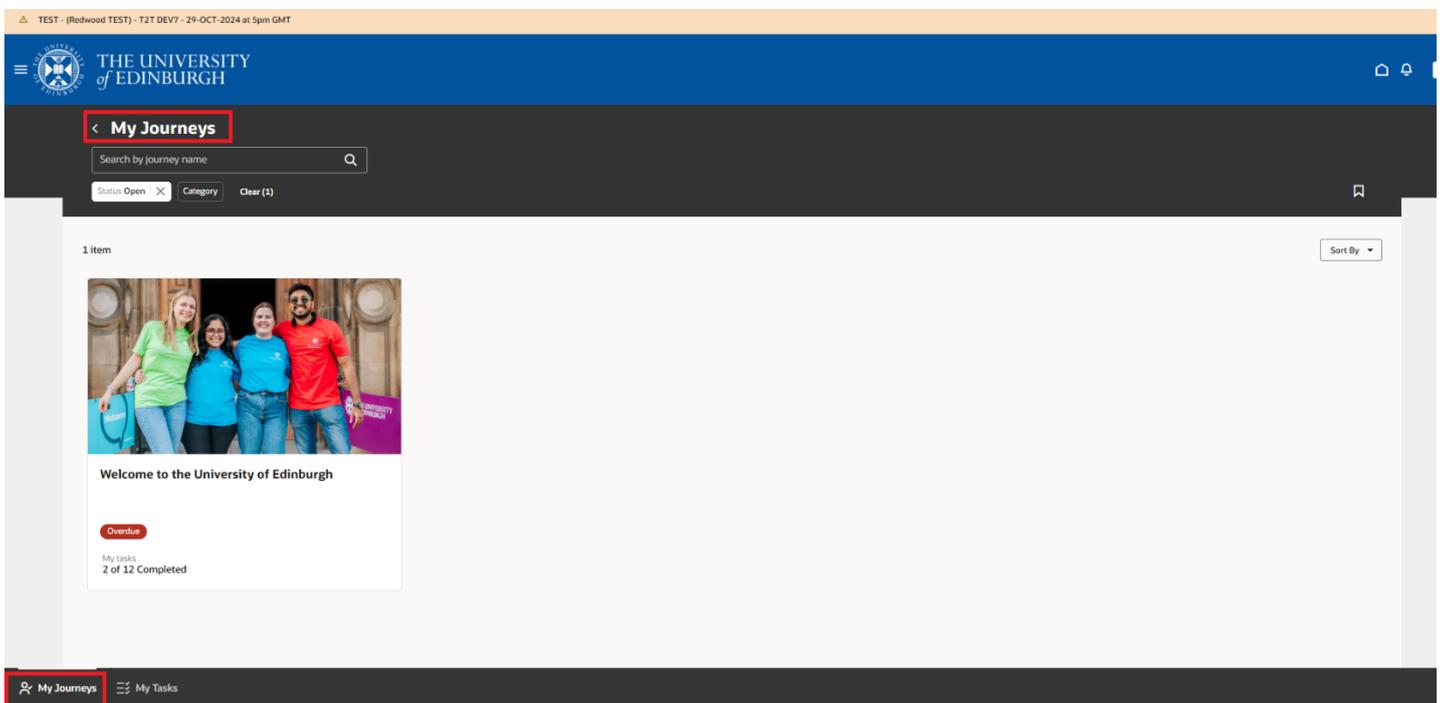
## Tips

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



## My Journeys

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



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

### Welcome to the University of Edinburgh



#### Tasks

Tasks completed 2 of 12

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

### 3. Click on the task name to show the detail

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

#### Welcome message from the Principal and Vice-Chancellor



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

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

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

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

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

**Professor Sir Peter Mathieson**  
Principal and Vice-Chancellor

**Complete Task** More Actions

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

## My Tasks

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

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

The screenshot displays the 'My Tasks' page. At the top, there is a navigation bar with a back arrow and the text '< My Tasks'. Below this is a search bar labeled 'Search by journey name' with a magnifying glass icon. To the right of the search bar are filter buttons: 'Status Open' (with a close icon), 'Category', 'Required', and 'Clear (1)'. The main content area is a list of tasks, each with a checkbox, a task icon, a title, a description, a due date, and a list of assignees. The tasks are:

- Here is your Certificate of Sponsorship (COS) number** (Due in 60 days) - Assignee: Tom Collins - 10841 Skilled worker - Certificate of Sponsorship - Status: Required
- Review and eSign terms of Interest Free Visa Loan** (Available once task Here is your Certificate of Sponsorship (COS) number is completed) - Assignee: Tom Collins - 10841 Skilled worker - Certificate of Sponsorship - Status: Required
- Submit your interest free visa loan application** (Available once task Review and eSign terms of Interest Free Visa Loan is completed) - Assignee: Tom Collins - 10841 Skilled worker - Certificate of Sponsorship - Status: Required
- Confirm when you have received your VISA and let us know the start date** (Available once task Here is your Certificate of Sponsorship (COS) number is completed) - Assignee: Tom Collins - 10841 Skilled worker - Certificate of Sponsorship - Status: Required
- Entering the UK and preparing for your arrival** (Available once task Confirm when you have received your VISA and let us know the start date is completed) - Assignee: Tom Collins - 10841 Skilled worker - Certificate of Sponsorship - Status: Required
- Sponsorship responsibilities during employment** (Available once task Upload PDF of online Right to Work confirmation and checklist is completed) - Assignee: Tom Collins - 10841 Skilled worker - Certificate of Sponsorship - Status: Required
- Check your bank details for your salary are correct** (Overdue by 41 days) - Assignee: Tom Collins - 10841 Welcome to the University of Edinburgh - Status: Required, Overdue
- Provide your tax information for HMRC** (Overdue by 9 days) - Assignee: Tom Collins - 10841 Welcome to the University of Edinburgh - Status: Required, Overdue
- Review and update your Skills and Qualifications** (Due in 42 days) - Assignee: Tom Collins - 10841 Welcome to the University of Edinburgh - Status: Required
- Settling in and making the most of your onboarding experience** (Overdue by 20 days) - Assignee: Tom Collins - 10841 Welcome to the University of Edinburgh - Status: Required, Overdue
- Tell us about your joining experience** (Overdue by 14 days) - Assignee: Tom Collins - 10841 Welcome to the University of Edinburgh - Status: Required, Overdue

At the bottom left, there is a navigation bar with 'My Journeys' and 'My Tasks' (highlighted with a red box).

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

**< My Tasks**

Search by journey name

Status Open Category Required Clear (1)

My Journeys **My Tasks**

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

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

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

Tom Collins - 10841  
Welcome to the University of Edinburgh

Overdue

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

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

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

**Complete Task** More Actions

## Reviewing and Completing Tasks

1. You will be notified of tasks assigned to you and reminded by email and the notification bell; however, you can monitor and take action to complete tasks from My Journeys or My Tasks.
2. Each task has a due date and can be completed in any order you desire. Some tasks require you to review the details only, and others require you to input information or upload documentation.
3. Follow the steps within the task, note that some tasks will take you to screens away from People and Money. **You should navigate back to the Task to complete if required.**

## Tips

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

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

Required

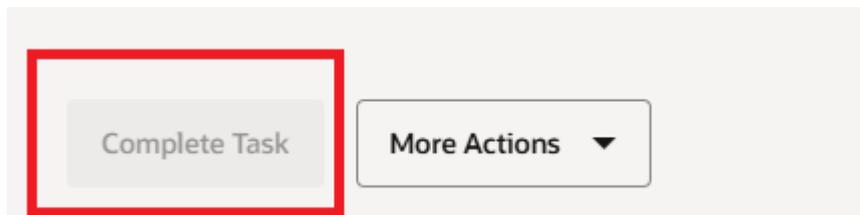
- **Overdue Tasks are clearly marked**

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

Required

Overdue

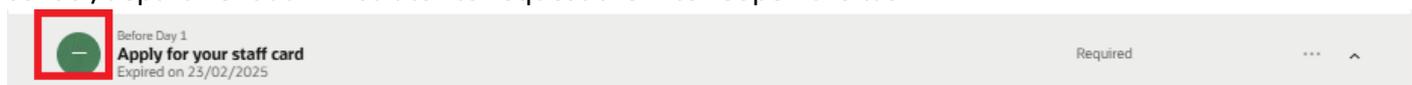
- If the **Complete Task** button is greyed out this means you haven't followed the steps within the task to enable completion. For example, it may require you to follow a link to complete additional details or read additional information or upload a document.



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

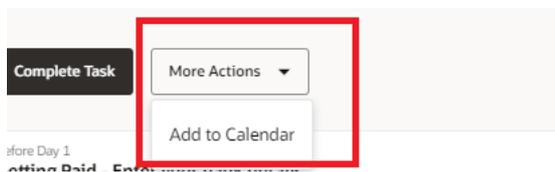


- **Expired Tasks** - If the task has expired it will be displayed as a green circle with a white line through it. The task should be reopened to be able to take action and complete, contact your line manager or school/department administrator to request them to reopen the task



- Some tasks have a handy feature to '**Add to Calendar**' to allow you to set aside time to complete within your outlook calendar, look for the **More Actions** button to use this feature. Clicking "Add to Calendar" creates a calendar event with these details:
  - **Start Date:** The date the task was assigned
  - **End Date:** The task's due date
  - **Title:** The task name
  - **Description:** A link to the task in the app

You can edit the event to start or end at different dates if needed. By default, the calendar event will be scheduled for the assigned date to the due date. The event will open and save in your default email provider's calendar.

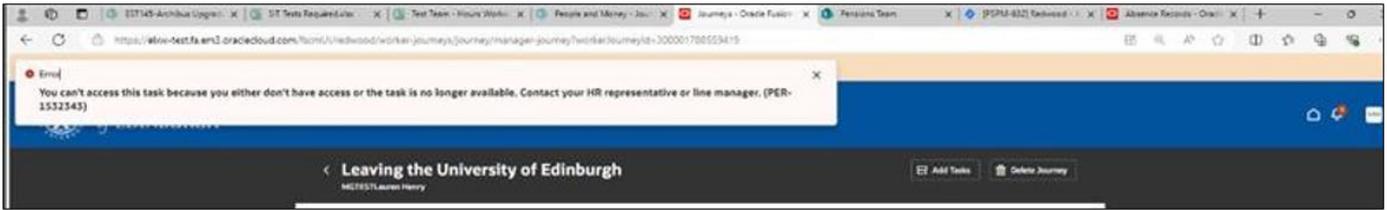


If the task is **greyed out** this means that the task cannot be completed until a prerequisite task is completed or until the start date of the task is reached



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

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



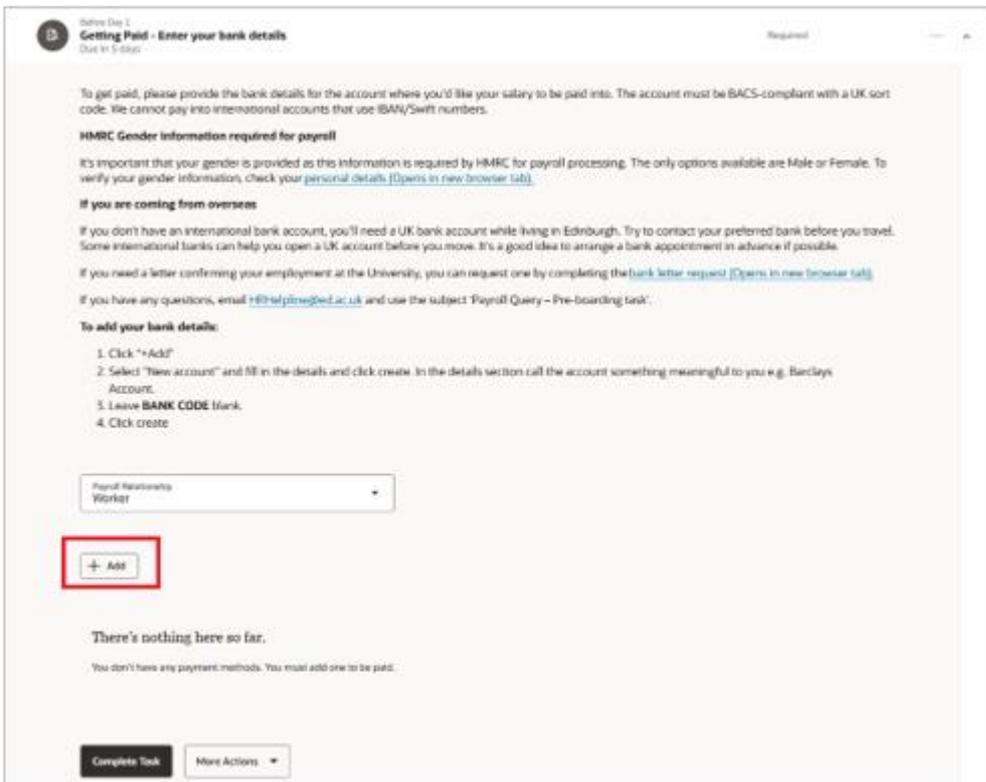
This is because the task has either expired or it is because you or the user is trying to access something that is intended for another user e.g. your line manager.

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

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



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



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

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

Then click **Create**

### New Payment Method

#### Details

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

Payment Type  
BACS

#### Bank Details

Select an account

New Account  Existing Account

Account Number Required

Account Holder

Bank Code

Sort Code

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



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

Day 1-90  
**Check your bank details for your salary are correct**  
Overdue by 41 days

Required **Overdue** ... ^

**To get paid, please check that the bank details you provided are still correct. If your bank details and payment method sections are correct just click "Complete Task".**

**To add a new account:**

1. Click "+Add"
2. Select "New account" and fill in the details and click create. Leave **BANK CODE** blank.

If your details have changed or you have not yet selected your preferred payment method, please provide this information now. It must be a BACS compliant bank account with a sort code, we cannot pay into international accounts with IBAN/Swift numbers. Please also ensure your Gender information for HMRC has also been completed.

Failure to provide your bank details and payment method before payroll cutoff will result in you not being paid or it will delay payment. If you are a Guaranteed Hours employee you must enter your bank details on day one to enable the hours you have worked to be submitted and paid to you correctly. Do not wait until you first claim your hours.

**HMRC Gender information required for payroll**

It is also of particular importance that you have provided your Gender as this information must be provided to HMRC and we are unable to process payroll without it. The only options available for selection are Male/Female as held by HMRC. To check your gender is recorded please check your [personal details \(opens in new browser tab\)](#).

**If you have travelled from overseas**

Unless you have an international account, you will need a UK bank account while living in Edinburgh.

Some international banks can open an account in the UK for you, if you have not done so already please speak to your bank to discuss this.

If you require a letter confirming you work for the University please make a [bank letter request \(opens in new browser tab\)](#).

If you have any questions or issues please raise a [service request \(opens in new browser tab\)](#) using the category Pay Enquiries – General.

**Warning** BACS

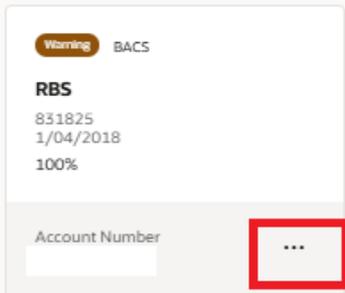
**RBS**

Account Number ...

**Complete Task** More Actions ▾

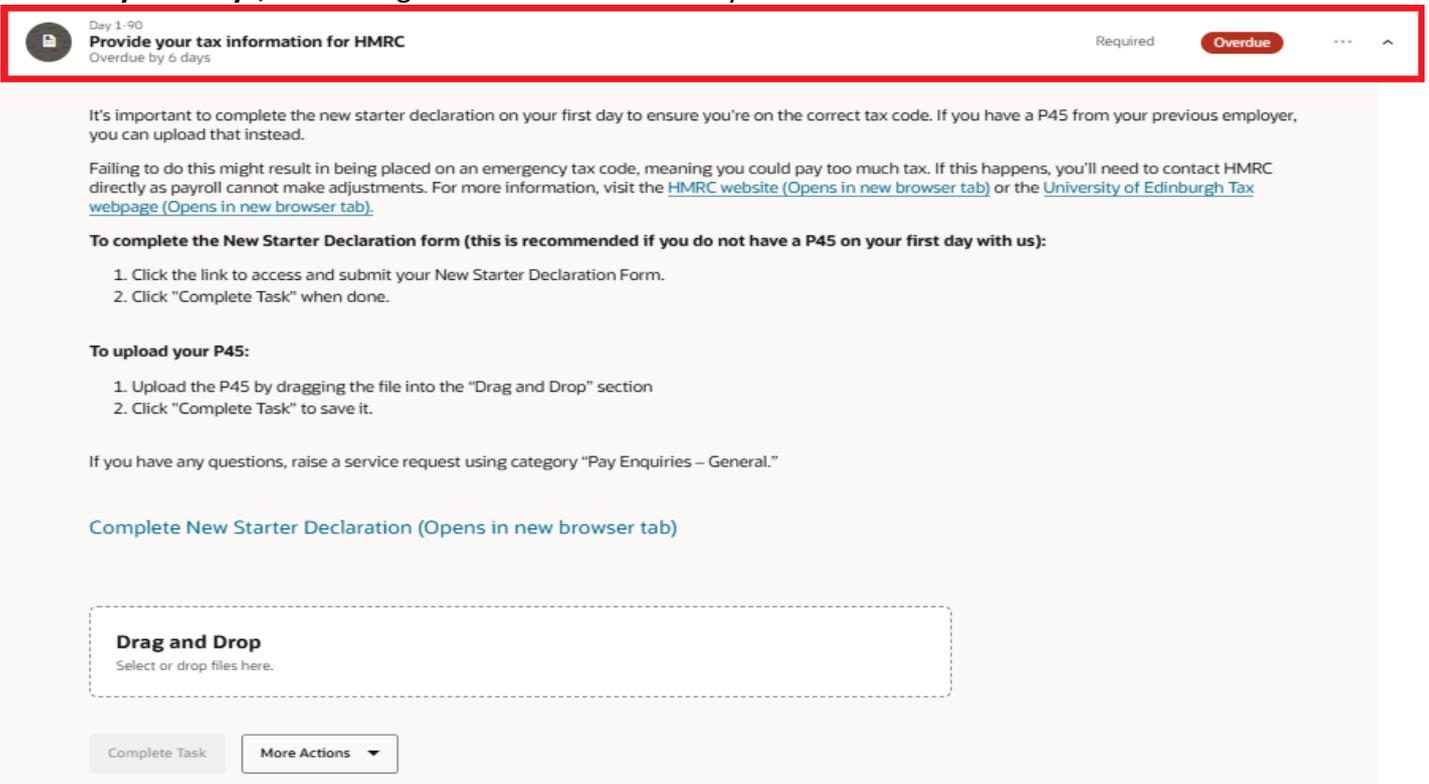
6. If you are **returning to the University**, you must check your bank details and complete this task following the steps above to make any amendments. Click on the ellipsis (three dots) to make any changes and to select a payment method if required

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



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

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



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

Required **Overdue** ... ^

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

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

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

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

**To upload your P45:**

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

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

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

**Drag and Drop**  
Select or drop files here.

Complete Task More Actions ▼

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



Day 1-90

### Provide your tax information for HMRC

Overdue by 6 days

Required

Overdue



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

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

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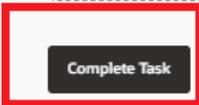
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If you have any questions, raise a service request using category "Pay Enquiries – General."

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

**Drag and Drop**  
Select or drop files here.



More Actions ▼

**Tip**

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

### Journeys you might see once you are an employee

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

| Journey Name | Purpose |  |
|--------------|---------|--|
|--------------|---------|--|

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

## Version History

| Version | Date       | Description                   | Approved By |
|---------|------------|-------------------------------|-------------|
| 0.1     | N/A        | Draft                         |             |
| 1.0     | 24/03/2025 | First version for publication | ME          |



## 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.