

THE UNIVERSITY of EDINBURGH

System User Guide

Line Manager - Guide to Housekeeping Legacy Checklists and Tasks

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Introduction

With the move to Journeys, all open and overdue checklists and tasks have automatically transferred over, providing improved visibility and access to initiated journeys and tasks. As a result, you may find a number of legacy checklists that were not previously concluded. To assist you in locating old checklists, refer to the <u>Appendix 1</u> for a list. Follow the steps below to complete your review and take the necessary actions.

For guidance on how to manage Journeys within People and Money please see the <u>Line Manager Guide</u> to Journeys.

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.

- 1. From the People and Money homepage select **My Team**, then **Journeys.** The default landing screen will be **Team Journeys.**
- 2. Using the Search functionality filter on Open and sort by Assigned Date (this will display newest to oldest).
- 3. Review the oldest Journeys by clicking on the name of the person to open the details.
- 4. **To take action**, navigate to **Actions** and select **Force Complete**. This will complete the Journey and all of the tasks within.

In Detail

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

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2. Using the Search functionality filter on Open (this will also include overdue Journeys) and sort by Assigned Date (this will display newest to oldest).

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- 3. Review the oldest Journeys by clicking on the name of the person to open the details. Here you will see how many days each task is overdue by. Any tasks assigned before 01 January 2024 can be closed off.
- 4. **To take action**, navigate to **Actions** and select **Force Complete**. This will complete the Journey and all of the tasks within.

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	< Enterprise Onboarding Checklist - Automatic Jus Standi	Actions Actions Add Tasks Force Complete	
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	Tell us dout your joining experience Generate to 111 days	Overdue ···· v	
	Accompase serve you her conjudications still up to date? Completed on 22/08/2021	Required •••• •	

Tips

- Where possible, notifications have been switched off for this action, however employees may receive a small number of notifications which will tell them that the checklist has been force completed. See <u>Appendix 2</u> for an example.
- If the Journey was assigned **after the launch date 24 March 2025** you will need to contact your local school/department administrator or the HR Helpline to support you as the force complete or remove Journey action will not be available to you.
- You should not remove/delete individual tasks as this will send notifications for each individual task.

Appendix 1

Legacy Onboarding Checklists

Checklist Name	Description		
Enterprise Onboarding	The generic preboarding checklist is automatically provisioned for new		
Checklist	hires once they become a 'pending worker' in P&M. The Day 1-90 checklist		
(This includes the Generic	is automatically provisioned from the new hires start date.		
Preboarding checklist and			
the Day 1-90 Onboarding			
Checklist)			
NHS Honorary Cover	Checklist to be manually assigned for roles that require NHS honorary		
	cover.		
	SDA/ Hiring manager should manually assign this checklist.		
Skilled Worker Checklist	Checklist for new hires requiring sponsorship. Once person is a pending worker in P&M, the SDA/ Hiring manager should manually assign this checklist which will guide you through the tasks in the process for obtaining sponsorship. The <u>Guidance - Use of the Skilled Worker Checklist</u> (under the Recruitment and Onboarding heading, Offer and Hire section) provides further information.		
Health Job Hazard Checklist	Checklist for roles that required a health risk assessment including, but not limited to Animal workers, Laboratory Managers/Technicians/workers, Night workers, Workshop staff, Principal Investigators/Research Group Leaders, Cleaners, Maintenance staff and Swimming pool maintenance staff. Local risk assessments must be used to identify any other applicable jobs. SDA/ Hiring manager should manually assign this checklist.		

Internal Moves/Additional	Checklist for internal transfers or those taking on an additional post, this
Posts	can include Internal Secondments. SDA/ Hiring manager should manually
	assign this checklist and liaise with the primary assignment line manager to have the checklist reassigned.
Arcadia Checklist	Checklist for Arcadia staff only. Automatically provisioned.

Legacy Offboarding (Leaver) Checklists

End Assignment (Resignation)	Abandon Contract
End Assignment (Not Resignation)	TUPE Out
Resignation	Mutually Agreed Termination
Resignation (Standard Retirement)	Voluntary Severance
Employment Terminated due to Immigration Restrictions	Dismissal
Redundancy	Resignation (Ill Health Retirement)
End of Fixed Term contract (<2 years)	Death in Service
Transfer to Non-Advertised Post	

Appendix 2

EVI: Task Farms (7)				
PHY Task Porce Ca				
These Controller				
Task Nette	Review your personal details and complete Equality, Diversity and Inclusion internation	Was Updated	41 minutes ago	
Task Description	Review your personal details and provide Equality, Diversity and Inclusion information.	located for Ali Ladak. 254242 and A	41 minutes age stigned to You is Citized	
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Owner	School/Dept Admin	Is Closed	a more ap	
Required	Tes		d ninde an	
Datus	Force Closed	Inv Is Desed	a constant age	
Shert Cale	September 12, 2024			
Due Date	Definition IS, STCH			

Version History

Version	Date	Description	Approved By
0.1	N/A	Draft in progress	
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.