



CASCADE GUIDANCE – NEW STARTER SELF SERVICE

Welcome to EACH! We are looking forward to you joining us

As part of our offer administration we do require you to complete a number of tasks on our HR Cascade database so that we have all the information we need to set you up as an employee, including the referees you would like us to approach, your personal contact details, next of kin, pension contribution choice etc, as well your bank information so that we can pay you.

We would like this to be as simple as possible for you so this document will guide you through the process from your first log in, through to completion.

The whole process should take you no longer than 45 minutes but you do not have to complete it all in one go.

The guidance notes below will explain how to edit and update the screens.

Before you begin you may find it helpful to have the following to hand:

- Your National Insurance number
- Names and contact details of your referees
- Your bank account details
- Next of kin name contact details
- Professional Registration issue and expiry dates
- Your driving licence number and expiry date

Please note: viewing and updating the screens works best on a laptop, tablet or desktop.

We have also included some helpful hints at the end of the guidance notes in section 5. but please do not hesitate to contact the **HR department at hrinbox@each.org.uk** should you have any further questions.



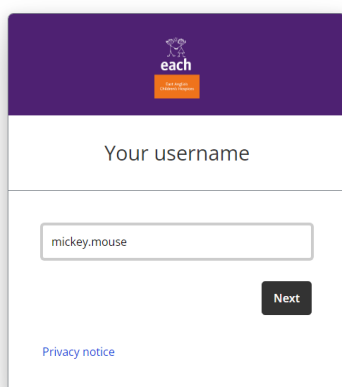
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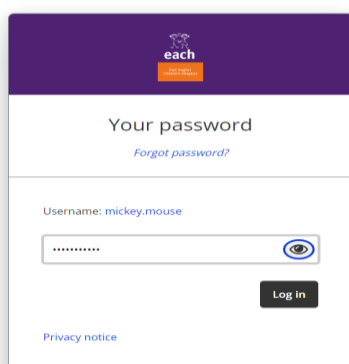
1. Logging in

Both your unique username and password can be found in your offer letter

Input your username then click next.

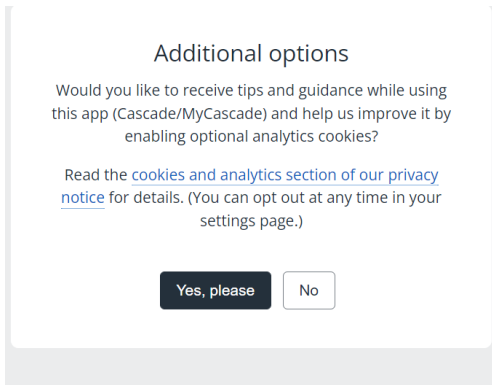
The screenshot shows a login form for 'each' (East Angles Action Centre for Homelessness). The header is purple with the 'each' logo. Below the header, the text 'Your username' is displayed. There is a text input field containing 'mickey.mouse'. To the right of the input field is a dark grey button labeled 'Next'. At the bottom left, there is a link for 'Privacy notice'.

then input your password

The screenshot shows the same login form, but now the text 'Your password' is displayed. Below it is a link for 'Forgot password?'. The 'Username: mickey.mouse' is displayed above the password input field. The password field contains eight dots. To the right of the input field is an eye icon for toggling visibility. To the right of the input field is a dark grey button labeled 'Log in'. At the bottom left, there is a link for 'Privacy notice'.

Click on 'log in'.

As this is the first time you have logged a pop up may appear asking whether you would like tips and guidance whilst using the cascade. Click whichever box applies to you.

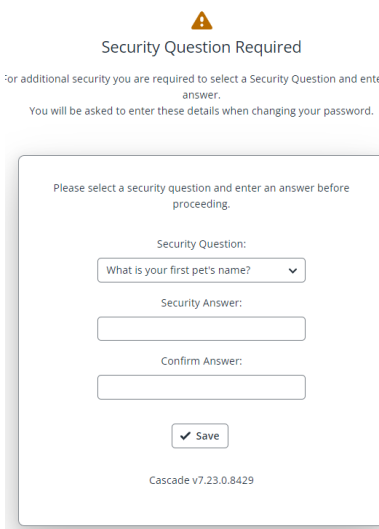



Additional options

Would you like to receive tips and guidance while using this app (Cascade/MyCascade) and help us improve it by enabling optional analytics cookies?

Read the [cookies and analytics section of our privacy notice](#) for details. (You can opt out at any time in your settings page.)

You may also be asked to complete a security question



 **Security Question Required**

For additional security you are required to select a Security Question and enter an answer.
You will be asked to enter these details when changing your password.

Please select a security question and enter an answer before proceeding.

Security Question:

Security Answer:

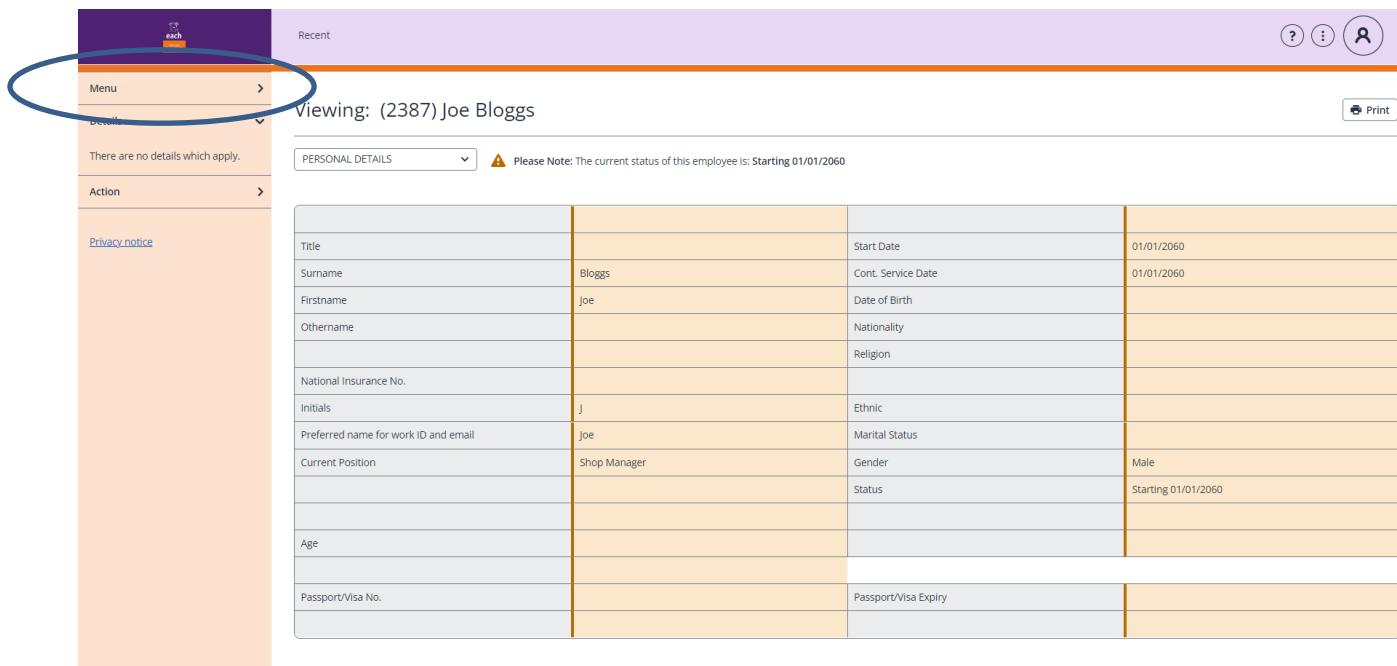
Confirm Answer:

Cascade v7.23.0.8429

Complete the boxes and click '**Save**'.

You will now be taken to your **Personal Details** screen. See below.

The screen may already have been part completed with some of your personal information.



Recent

Menu

Details

There are no details which apply.

Action

[Privacy notice](#)

Viewing: (2387) Joe Bloggs

PERSONAL DETAILS

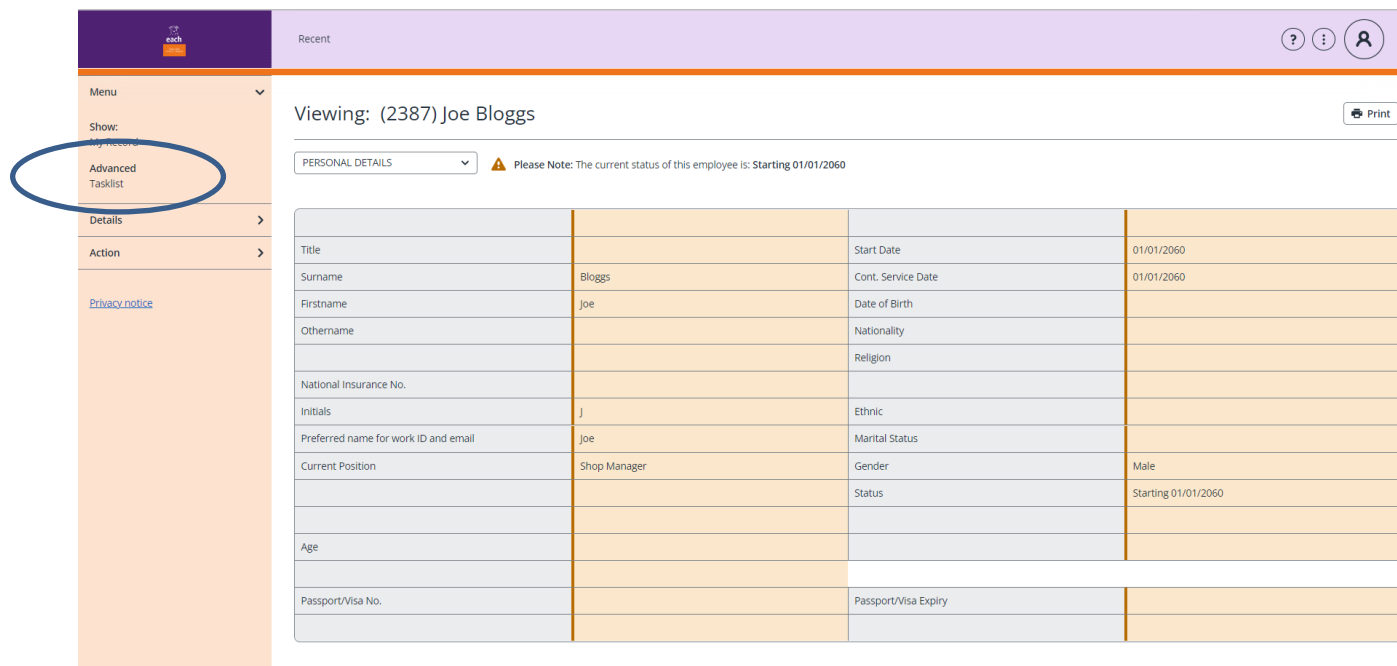
Please Note: The current status of this employee is: Starting 01/01/2060

Title		Start Date	01/01/2060
Surname	Bloggs	Cont. Service Date	01/01/2060
Firstname	Joe	Date of Birth	
Othename		Nationality	
		Religion	
National Insurance No.			
Initials	J	Ethnic	
Preferred name for work ID and email	Joe	Marital Status	
Current Position	Shop Manager	Gender	Male
		Status	Starting 01/01/2060
Age			
Passport/Visa No.		Passport/Visa Expiry	

Click on '**Menu**' at the top left of the screen

The '**Tasklist**' link will appear. See below.

Click on the '**Tasklist**' link.



Recent

Menu

Show: My record

Advanced Tasklist

Details

Action

[Privacy notice](#)

Viewing: (2387) Joe Bloggs

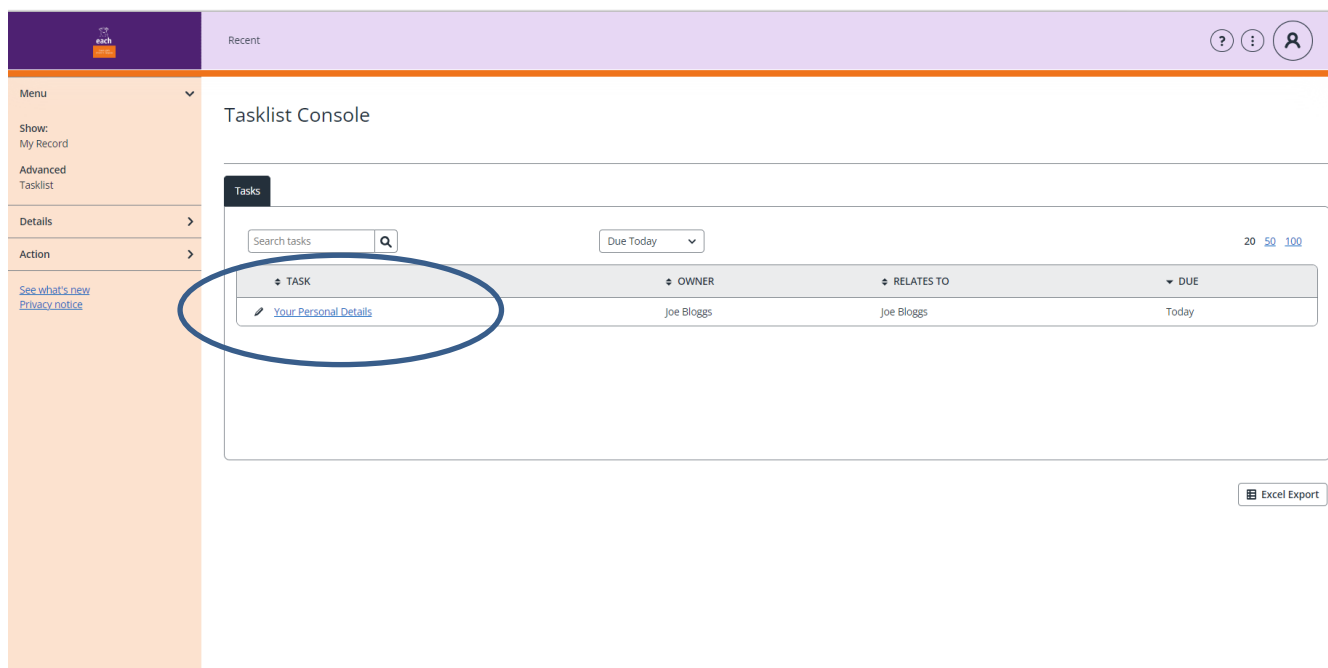
PERSONAL DETAILS

Please Note: The current status of this employee is: Starting 01/01/2060

Title		Start Date	01/01/2060
Surname	Bloggs	Cont. Service Date	01/01/2060
Firstname	Joe	Date of Birth	
Othename		Nationality	
		Religion	
National Insurance No.			
Initials	J	Ethnic	
Preferred name for work ID and email	Joe	Marital Status	
Current Position	Shop Manager	Gender	Male
		Status	Starting 01/01/2060
Age			
Passport/Visa No.		Passport/Visa Expiry	

You will now be taken to your **Tasklist Console** screen.

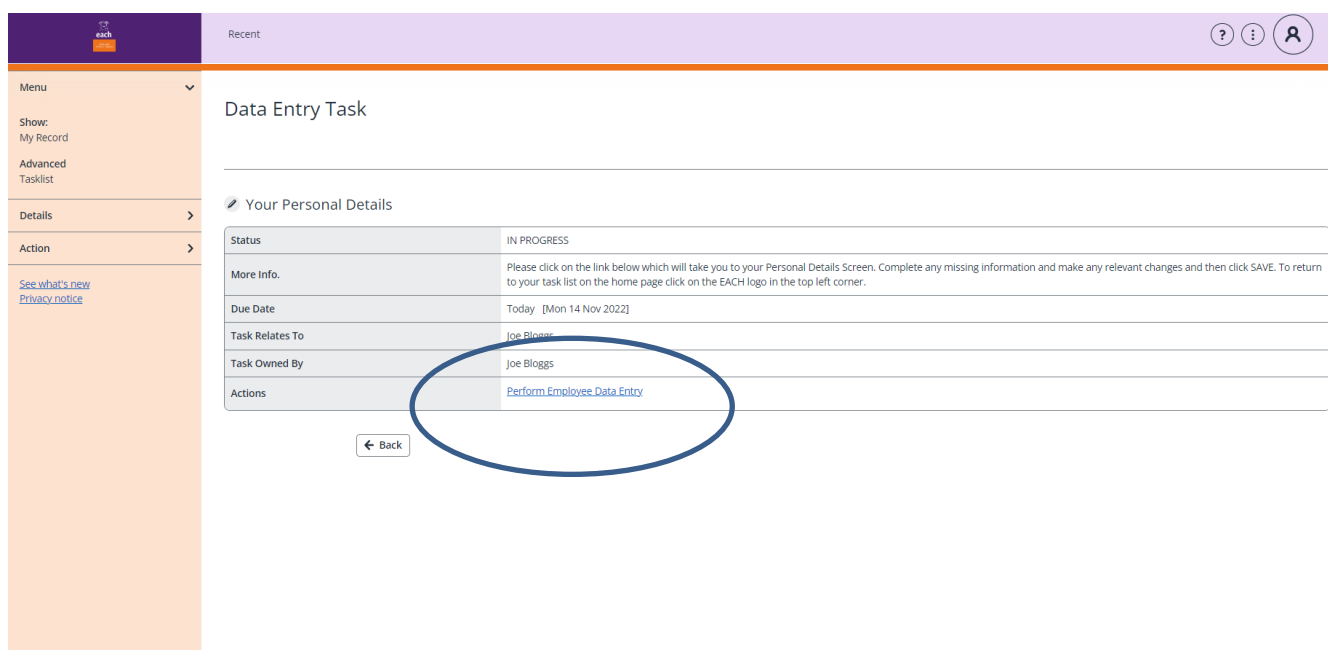
2. Tasklist Console:



The tasklist console screen will show the first form we would like you to complete as part of your onboarding. The first form is **Your Personal details**.

Click on the blue **Your Personal Details** link shown above.

The following screen will appear.



Click on the '**Perform Employee Data Entry**' link in blue .

Your Personal Details form will appear – see below

The screenshot shows a web application interface. On the left is a sidebar with a 'Menu' section containing 'Details' and 'Joe Bloggs'. Below this is a 'Status' section with details like 'Starting 01/01/2060', 'Job Title: Shop Manager', 'Works For: Donald Duck', 'Location', and 'LOS'. The main content area has a header 'Recent' and a title 'Viewing: (2387) Joe Bloggs > PERSONAL DETAILS Record'. Below the title is a dropdown menu set to 'PERSONAL DETAILS' and a warning message: 'Please Note: The current status of this employee is: Starting 01/01/2060'. The form itself is a table with four columns. The first column contains labels for various fields, many of which are marked with an asterisk (*). The second column contains input fields or text. The third and fourth columns contain dates or other data. The fields include: Title, Surname (*), Firstname (*), Othername, National Insurance No. (*), Initials, Preferred name for work ID and email, Current Position, Age, Start Date, Cont. Service Date, Date of Birth, Nationality (*), Religion (*), Ethnic (*), Marital Status (*), Gender (*), and Status.

*			
Title	<input type="text"/>	Start Date	01/01/2060
Surname *	Bloggs	Cont. Service Date	01/01/2060
Firstname *	Joe	Date of Birth	<input type="text"/>
Othername		Nationality *	<input type="text"/>
		Religion *	<input type="text"/>
National Insurance No. *	<input type="text"/>		
Initials	J	Ethnic *	<input type="text"/>
Preferred name for work ID and email	Joe	Marital Status *	<input type="text"/>
Current Position	Shop Manager	Gender *	Male
		Status	Starting 01/01/2060
Age			

3. Completing forms:

You can now start to complete the form.

Please note some fields are mandatory which means you **must complete them** in order to save the data and move onto your next form to complete. Mandatory fields are denoted by an asterix *.

This screenshot is identical to the one above, but with two blue arrows pointing from a box labeled 'Mandatory field' to the 'Religion *' and 'Gender *' fields in the form table.

Mandatory
field

On the **Personal Details** screen there are a number of mandatory fields that must be completed. **'Gender'** and **'Religion'** are highlighted above.

Once you have completed all the necessary fields (including all mandatory fields) click **'Save'** at the bottom of the form.

Recent

Menu

Showing: My Record
Advanced Tasklist
Details
Action

Viewing: (2387) Joe Bloggs > PERSONAL DETAILS Record

PERSONAL DETAILS Please Note: The current status of this employee is: Starting 01/01/2060

Title		Start Date	01/01/2060
Surname *	Bloggs	Cont. Service Date	01/01/2060
Firstname *	Joe	Date of Birth	
Othername		Nationality *	** Required
		Religion *	** Required
National Insurance No. *	NH653467D		
Initials	J	Ethnic *	** Required
Preferred name for work ID and email	Joe	Marital Status *	** Required
Current Position	Shop Manager	Gender *	Male
		Status	Starting 01/01/2060
Age			
Passport/Visa No.		Passport/Visa Expiry	

Save Cancel

Recent

Menu

Details

Joe Bloggs

Status
Starting 01/01/2060
Job Title
Shop Manager
Works For
Donald Duck
Location
...ces -> Human Resources -> Demo
LOS
-37 Yrs -2 Mths

Action

Privacy notice

Viewing: (2387) Joe Bloggs

PERSONAL DETAILS Please Note: The current status of this employee is: Starting 01/01/2060

Title		Start Date	01/01/2060
Surname	Bloggs	Cont. Service Date	01/01/2060
Firstname	Joe	Date of Birth	
Othername		Nationality	British
		Religion	Prefer Not To Say
National Insurance No.	NH523567D		
Initials	J	Ethnic	Prefer Not To Say
Preferred name for work ID and email	Joe	Marital Status	Not Known
Current Position	Shop Manager	Gender	Male
		Status	Starting 01/01/2060
Age			
Passport/Visa No.		Passport/Visa Expiry	

Update Record

The update Record box will appear. **DO NOT** click on the Update Box

Click on **Menu** at the top left of the screen

Recent

Viewing: [\(2387\) Joe Bloggs](#) > PERSONAL DETAILS Record

PERSONAL DETAILS

Please Note: The current status of this employee is: Starting 01/01/2060

Title		Start Date	01/01/2060
Surname *	Bloggs	Cont. Service Date	01/01/2060
Firstname *	Joe	Date of Birth	
Othername		Nationality *	** Required
		Religion *	** Required
National Insurance No. *	NH653467D		
Initials	J	Ethnic *	** Required
Preferred name for work ID and email	Joe	Marital Status *	** Required
Current Position	Shop Manager	Gender *	Male
		Status	Starting 01/01/2060
Age			
Passport/Visa No.		Passport/Visa Expiry	

The tasklist link will appear See below.

Click on the 'Tasklist' link

Recent

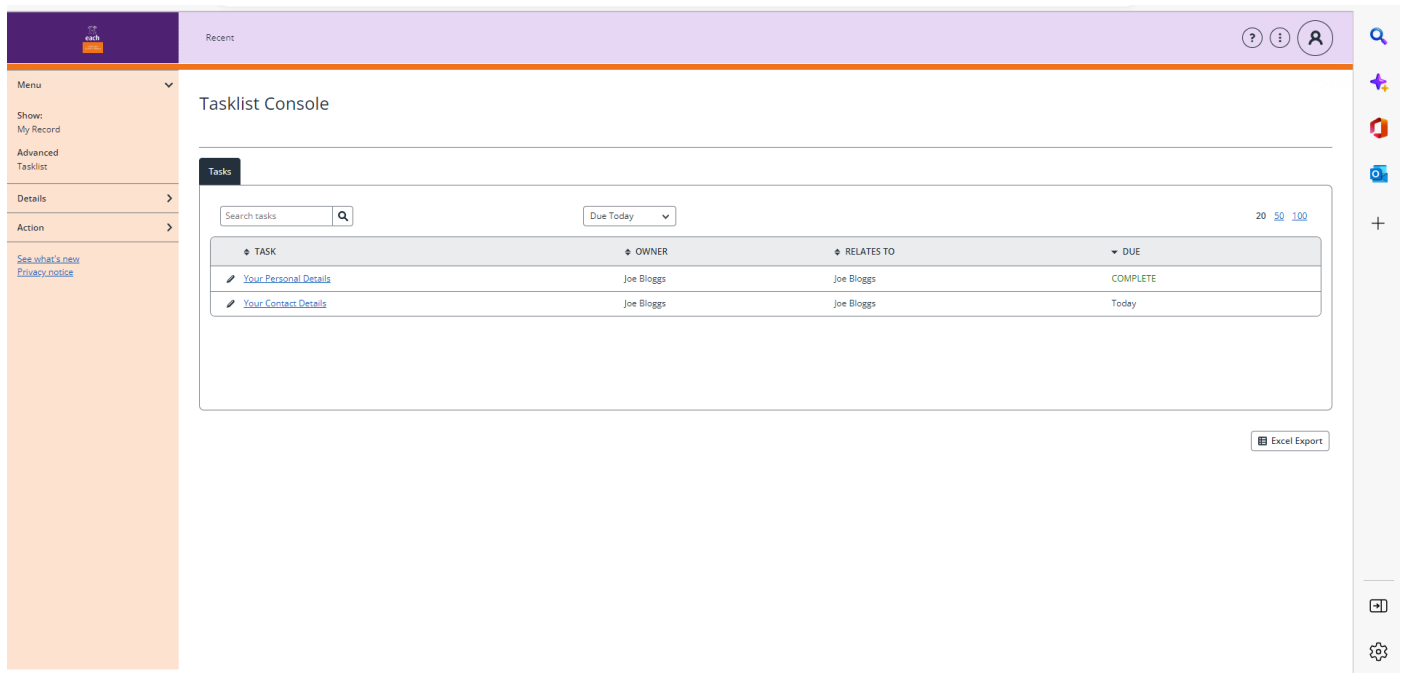
Viewing: [\(2387\) Joe Bloggs](#) > PERSONAL DETAILS Record

PERSONAL DETAILS

Please Note: The current status of this employee is: Starting 01/01/2060

Title		Start Date	01/01/2060
Surname *	Bloggs	Cont. Service Date	01/01/2060
Firstname *	Joe	Date of Birth	
Othername		Nationality *	** Required
		Religion *	** Required
National Insurance No. *	NH653467D		
Initials	J	Ethnic *	** Required
Preferred name for work ID and email	Joe	Marital Status *	** Required
Current Position	Shop Manager	Gender *	Male
		Status	Starting 01/01/2060
Age			
Passport/Visa No.		Passport/Visa Expiry	

The Task list console will appear again with the next form we would like you to complete- **Your Contact Details**



Repeat the process by clicking on the [Your Contact Details](#) link and then the [Perform Employee Data Entry](#) link.

The **Your Contacts Details** form will appear.

Complete the form including any mandatory fields marked with an asterix *

Click **Save**. The update box will appear. **Do not click on the Update Box**

Click **Menu**

Click **Tasklist**

The tasklist console will appear and the next form to complete will show in your task list console - **Your Next of kin**.

Repeat the process for this form

There are 13 forms to complete.

Once you have completed all your forms and they are marked as **COMPLETE** on your tasklist console your onboarding administration is complete.

4. Uploading documents

Some forms require you to upload relevant documents e.g. The **Your Qualifications** form shown below.

Recent

Menu

Details

Joe Bloggs

Status

Starting 01/01/2060

Job Title

Shop Manager

Works For

Donald Duck

Location

...es -> Human Resources -> Demo

LOS

-37 Yrs -2 Mths

Action

Privacy notice

Viewing: (2387) Joe Bloggs

Print

QUALIFICATIONS

Please Note: The current status of this employee is: Starting 01/01/2060

Please select any relevant qualifications (only if required for your role)

Qualification	<input type="text"/>
Level (if relevant)	<input type="text"/>
Title	<input type="text"/>
Awarding Body / Institution	<input type="text"/>
Date Passed	<input type="text"/> <input type="button" value="📅"/> <input type="button" value="✕"/>
Grade	<input type="text"/>

Please upload certificates of relevant qualifications here:

OR drag & drop files here.

[Manage Documents](#)

To upload a document click on the **Browse Files** tab shown and add the document you would like to attach from your own files. Or click and drag the document from another application into the box. You can upload photos of documents and jpeg files.

If you do not have access to digital files please let us know and we will advise on alternative options for you to provide the documents

5. Updating and editing forms

You can make any additions or edits to forms that you have started by clicking on **My record** at the top left of the screen.

Tasklist Console

Search tasks Due Today

TASK	OWNER	RELATES TO	DUE
Your Driving Licence & Insurance Information	Joe Bloggs	Joe Bloggs	COMPLETE
Your Personal Details	Joe Bloggs	Joe Bloggs	COMPLETE
Your Next of Kin	Joe Bloggs	Joe Bloggs	Yesterday
Your Bank Details	Joe Bloggs	Joe Bloggs	COMPLETE
Your Health	Joe Bloggs	Joe Bloggs	COMPLETE
Your Contact Details	Joe Bloggs	Joe Bloggs	COMPLETE
Your NHS Pension Details	Joe Bloggs	Joe Bloggs	Yesterday
Your Qualifications	Joe Bloggs	Joe Bloggs	COMPLETE
Your Professional Registration	Joe Bloggs	Joe Bloggs	Yesterday
Your References	Joe Bloggs	Joe Bloggs	Yesterday
Pre-Employment Declaration	Joe Bloggs	Joe Bloggs	COMPLETE
HMRC Starter Checklist	Joe Bloggs	Joe Bloggs	COMPLETE
Your EACH Aviva Pension Details	Joe Bloggs	Joe Bloggs	Yesterday

You will be taken to the following screen.

Viewing: (2335) Joe Bloggs

PERSONAL DETAILS Please Note: The current status of this employee is: Starting 01/01/2060

CONTACT DETAILS	Mr	Start Date	01/01/2060
DRIVER INFORMATION	Bloggs	Cont. Service Date	01/01/2060
EACH AVIVA PENSION	Joe	Date of Birth	
HEALTH QUESTIONNAIRE		Nationality	Prefer Not To Say
HMRC NEW STARTER CHECKLIST		Religion	Prefer Not To Say
NEXT OF KIN	NH565656D	Ethnic	Prefer Not To Say
NHS PENSION JOINER		Marital Status	Not Known
PERSONAL DETAILS		Gender	Male
PRE EMPLOYMENT DECLARATION		Status	Starting 01/01/2060
PROFESSIONAL REGISTRATION			
QUALIFICATIONS			
REFERENCE CONTACT DETAILS			
YOUR BANK DETAILS			
National Insurance No.		Passport/Visa Expiry	
Initials	J		
Preferred name for work ID and email	Joe		
Current Position	Shop Manager		
Age			
Passport/Visa No.			

Click on the drop down box.

Each option relates to a form we would like you to complete.

Click on the option/form you would like to update. In this instance it is the **Contact Details** screen.

You will be taken to the relevant screen for updating.

Click **'Update'** first to enable you to add or make changes to the screen.

Recent

Alternative telephone number

Home Email

Update Record

Once you have made your changes click **Save**.

Please note you can only update forms that you have completed or started to complete. All other forms will be locked.

6. Completed Forms

You can see whether a form has been completed by looking on your Tasklist console. If it has been completed it will show as **COMPLETE** in the 'Due' column.

If it has not been completed it will show as **Today** in the **Due** column.

Recent

Menu

Show:

My Record

Advanced Tasklist

Details

Action

See what's new

Privacy notice

Tasklist Console

Tasks

Search tasks

Due Today

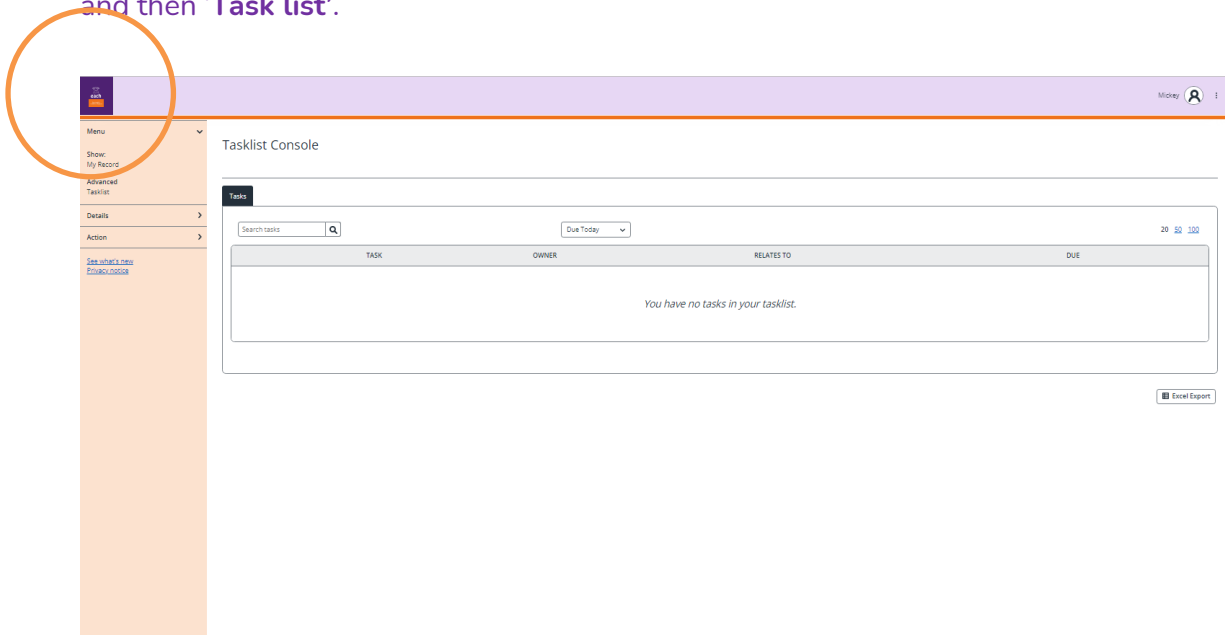
TASK	OWNER	RELATES TO	DUE
Your Next of Kin	Joe Bloggs	Joe Bloggs	COMPLETE
Your Personal Details	Joe Bloggs	Joe Bloggs	COMPLETE
Your Health	Joe Bloggs	Joe Bloggs	Today
Your Contact Details	Joe Bloggs	Joe Bloggs	COMPLETE

Excel Export

7. Helpful hints for completing forms

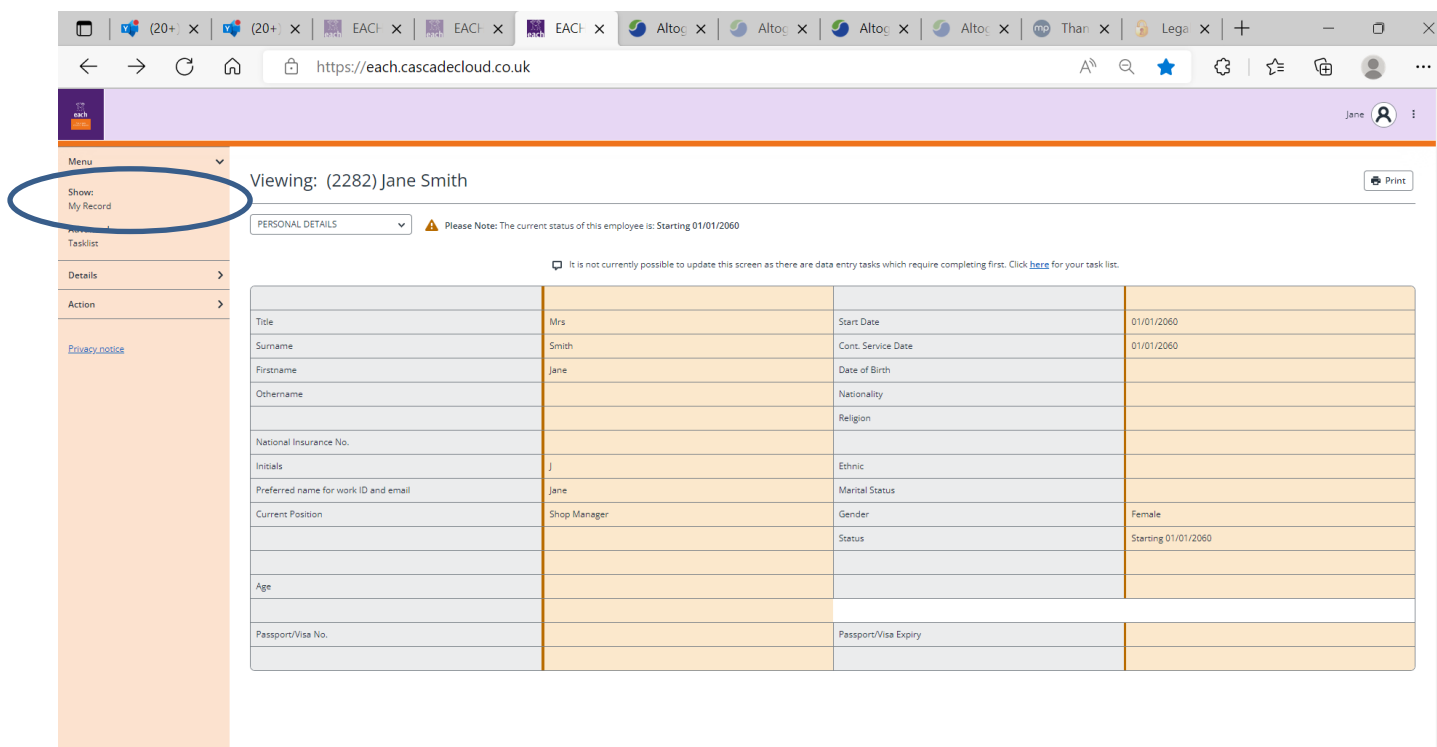
Returning to your Tasklist console:

If at any time you would like to go back to your **Tasklist Console** you can do so by clicking on the **EACH logo** in the top left-hand corner which appears over every screen. OR click '**Menu**' again and then '**Task list**'.



My Record

By clicking on the Menu link the '**My Record**' link will appear



On the '**My record**' you can view all the data already held on each of the forms .

Viewing: (2282) Jane Smith

Please Note: The current status of this employee is: Starting 01/01/2060

It is not currently possible to update this screen as there are data entry tasks which require completing first. Click [here](#) for your task list.

National Insurance No.			
Initials	J	Ethnic	
Preferred name for work ID and email	Jane	Marital Status	
Current Position	Shop Manager	Gender	Female
		Status	Starting 01/01/2060
Age			
Passport/Visa No.		Passport/Visa Expiry	

Click on the drop-down box shown above. All the forms we would like you to complete can now be seen

You can pick each one to see what information you have already inputted.

You can update forms from this list but only forms that you have either completed or have part completed. All other forms are locked from this screen. See the [Updating and editing your screens](#) section 4 above for further details

I hope you find this guidance note useful but please do not hesitate to contact the HR department at hrinbox@each.org.uk if you are unsure about any part of the process or you have difficulty completing any of the forms.

We look forward to meeting you soon.