OS USER GUIDES – Part 2: Associate Consultants Onboarding

Internal Staff Help Centre – ASI OS Onboarding

Associate Consultants (End-to-End)

Staff Type Definitions

Associate Consultant
Independent consultants contracted directly by ASI to provide expert services on a short-term or task-specific basis. They are not ASI employees, but work under a signed contract for a defined scope and period.

⚠ Note: Only the **Project Team (PD, PM and AM)** can carry out this process.

Step 1: Issuing the Invitation

Responsible: Project Team
- Navigate to the OS and go to the left-hand menu. - Click **People Management > People Directory** - Click **Onboard a New User** - Complete the Invitation Form: - Name: full name of the user - Personal email address (for onboarding link) - Staff Type: **Associate Consultant** - ASI Role: pre-populated - Location: select accurately (affects payment) - Click **SUBMIT**

📧Onboarding link emailed to user (valid 24h).
🖍If expired: OS Support Team, IT team, Layth, or Adrian can resend via the user's profile.

Step 2: User Receives Invitation Email

Responsible: User (Associate Consultant)
- Open personal email inbox
- Find **"Welcome to Adam Smith International: Onboarding Email"**
- Click the magic link → redirected to **ASI OS Onboarding Page**

Step 3: Entering Personal Information

Responsible: User (Associate Consultant)

a. Personal Info - First/Last/Display Name - DOB, Marital Status, Gender - Nationality, Language - ID Type & Number (**Required**) - Travel/Health Insurance: Yes = upload required

b. Contact Info - Current & Permanent Address - City, State, Zip, Country - Phone Numbers - Email (pre-filled) - 🔗Check box if addresses match

c. Upload Documents - ID (Front & Back) OR Passport (**Mandatory**) - Profile Picture (Optional)

d. Create Signature - Draw or upload
- Update anytime
- Click **NEXT**

Step 4: Emergency and Health Information

Responsible: User (Associate Consultant)
- **a. Emergency Contact** - Blood Group (**Mandatory**) - **b. Medical Declaration** - Indicate underlying health issues (**Mandatory**)
- If Yes, add details
- Provide Primary Doctor's Name + Contact - **c. Proof of Life** - Choose 1 security question
- Provide answer (**Mandatory**) - **d. Add Dependents (Optional)** - Click **Add another dependent** if applicable
- Fill details for each dependent - **e. Next of Kin / Emergency Contact** - Full Name (**Mandatory**) - Relationship (parent, spouse, friend) - Contact Number - Click **NEXT**

Step 5: Upload Supporting Documents

Responsible: User (Associate Consultant)

Required: - Academic Certificates (PDF/JPEG) - CV or Experience Letter

Optional: - Professional Certificates - Other relevant documents

Click **NEXT**

Step 6: Consent Forms & References

Responsible: User (Associate Consultant)

a. Background Checks & Data Privacy
Two mandatory forms must be signed: - Background Verification Consent - Data Privacy Notice
Click + to open each form → Read → Scroll → **Sign this**

b. References - Enter details for two referees (must have unique emails): - Email Address (**Required**) - Organisation Contact (**Required**) - Position & Organisation (Optional) - Click **NEXT**

📧Reference emails are sent.
📧Verification request sent to **service.desk@adamsmithinternational.com**

Step 7: Review and RDC Checks

Responsible: Service Desk (Eliza)
- Go to **People Management > People Directory** - Filter profiles awaiting verification - Open user profile → click **RDC Checks** - RDC tool opens: [RDC Login] - If red flags appear: - Request clarifications from user - Complete Due Diligence Clearance Form - Send to Legal for review - 🔗Once cleared, mark user as Approved and upload RDC report

Step 8: Final Verification Checklist

Responsible: Project Team
- Tick all verification checkboxes in profile
🖍️Once complete, **Issue Contract** button appears

Step 9: Issue Contract

Responsible: Project Team
- In **People Directory**, open user profile
- Click **Issue Contract** - Complete form: - Contract Template: **Adviser Template** (mandatory) - Contract Type: **Fixed Term** - Start Date / End Date - Line Manager - Principal Work Location - Project - Daily rate (if fixed/monthly/deliverables → specify in Special Conditions Box or ToR) - Upload Term Sheet/Coversheet if needed - Upload ToR (type/paste text or upload JPEGs) - Edit Schedule 1 section - Specify Special Conditions - Optional: Send for Review → Toggle ON → Add reviewers → Save Draft → appears under **My Approvals > Contract Review** - Assign Signatory or Self-sign (usually Project Director) - Line Manager signs after ASI Signatory (if applicable) 📧Contract sent to ASI Signatory first, then User (Associate Consultant)

Step 10: Consultant Signs & Submits

Responsible: User (Associate Consultant)
- Open email: **"Sign Contract and Complete your Onboarding"**
- Click magic link
- Sign forms: - Ethics & Compliance Declaration - Conflict of Interest Declaration - Expression of Wish (Optional for ACs) - Provide Bank Details - Review full contract → **Sign this** - Update signature if needed
- Click **I agree & submit**

📌Final screen shows Microsoft login credentials → Save these!

Step 11: Final Login

Responsible: User (Associate Consultant)
- Select **Complete Onboarding using Microsoft 365 credentials**
- Set up Microsoft Authenticator app for secure login
- Login enabled via: - ASI email (primary) - Personal email (backup)

📧Notifications sent to Service Desk + Line Manager
🔗Onboarding Complete!

Next Part: Part 3 – Associates Working Through Their Own Company