



## Welcome to Namely: Your TeachBeyond Member Portal

In this packet, you will find training to help you navigate Namely, as well as steps to be taken upon first login. Throughout the packet you will find various tasks to complete. These are in blue and have instructions to accompany them.

If you have any questions about Namely and navigating this new system, please contact [personnel.uk@teachbeyond.org](mailto:personnel.uk@teachbeyond.org).

We hope and pray that that Namely will make life with TeachBeyond easier for you and will connect our community around the world.



## Staying Connected

Staying connected with TeachBeyond is important! Namely is a tool that can help both you and your home office stay informed and connected. Here are a few of the ways that Namely keeps us connected:

Namely allows you to keep your home office up to date with all of your information. This allows us to better support you.

Namely connects you to forms & resources. These resources will continue to be updated and improved as time goes on.

Namely connects our global community. Your team leaders and Regional Directors use Namely to keep themselves well informed on their teams. You are also able to connect with other members who may be in a similar role.

## First Login

You should have received an invitation from Namely, inviting you to login for the first time. When you click the link in the e-mail you will be able to set your password and get into the system. If you have any issues with logging in or you did not receive your invitation, please contact [personnel.uk@teachbeyond.org](mailto:personnel.uk@teachbeyond.org).

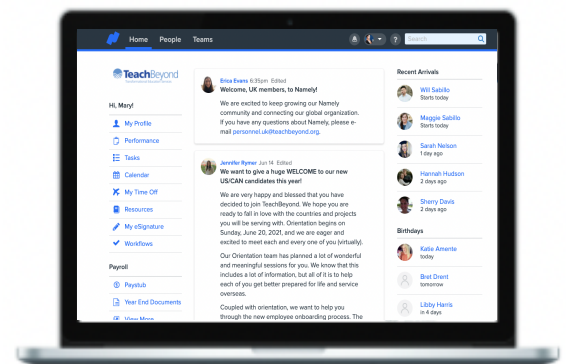
**YOUR TASK:** Bookmark or save [teachbeyond.namely.com](https://teachbeyond.namely.com) to be able to login to Namely in the future.

## Your Homepage

When you first login you will arrive at your homepage. It is important to note that there are different access levels within Namely and you will only be able to see the information you have permission to see. You will not be able to see any confidential information about other members.

Key items on your homepage:

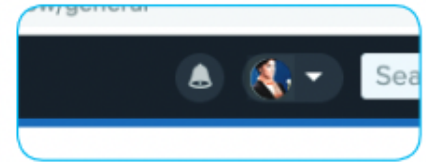
- The left-side navigation column gives you access to different parts of Namely, most importantly your profile and Resources.
- Announcements are occasionally posted by different department leads. Each announcement will be clearly labelled if it only refers to members in a specific TeachBeyond entity.
- You can access the member directory through the People tab or by using the search bar.



- The Payroll portion of the left-side navigation column is only relevant to those paid through Namely (not UK).

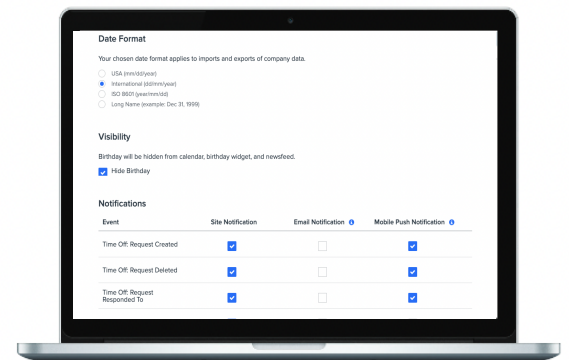
## Adjusting your Settings

Namely is set up to send you notifications in various ways: via e-mail, via notifications within the portal, and via mobile app. You may adjust these settings to your preferences. To adjust these settings, find the picture icon at the top right, next to the search bar. Click on the arrow and find "Settings" in the drop-down menu.



On the settings page, you will have the opportunity to change the date format, hide your birthday, and decide how you wish to receive notifications.

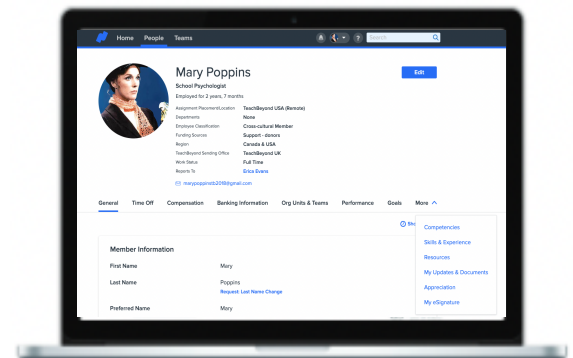
Note: Many of the settings will not be applicable to your situation and won't matter for the practical usage of Namely. We recommend deleting all notifications except for the eSignature: Requested notifications, as these will notify you when we send you a document for signature.



**YOUR TASK:** Update your settings to only receive notifications you would like to receive and select which date format you would like to use. Don't forget to save your settings!

## Your Profile

Clicking the words "My Profile" in the left navigation column will take you to your member profile. This is where you will be able to see and update basic information about yourself. Other members will only be able to see very basic information about you when clicking on your profile. A People Services Administrator will be able to access all of your information in order to complete tasks related to your employment/membership with TeachBeyond.



**YOUR TASK:** Please look through your profile information and check it for accuracy, as errors may have occurred during the data upload.

### Editing your Profile

There are two ways to edit your profile. Some parts of your profile can be edited on your own, while other edits must be done via a **workflow request** because of the nature of the information being updated. The workflow requests can be found as a link under the profile field where the change needs to be made. If you need to edit one of those fields, please click on the link and follow the instructions. Once it has been submitted, your People Services representative will be notified and will approve the change.

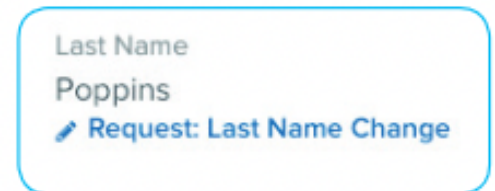
**YOUR TASK:** Request any changes that need to be made via Workflow Request.

Many other parts of your profile that do not have a Request link under the profile field can be edited directly by you. To do that, click the **“Edit” button** at the top left of your profile page. Be sure to save the changes after you have made them!

**YOUR TASK:** Click the Edit button & update any information that is incorrect on your profile that can be edited by you. Profile fields that have not been populated will not show up on your profile unless you are in Edit mode, so please be sure to look at your profile after clicking the edit button to determine what needs to be updated.

Be sure to upload the following items:

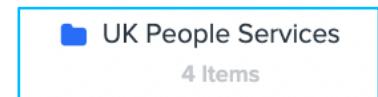
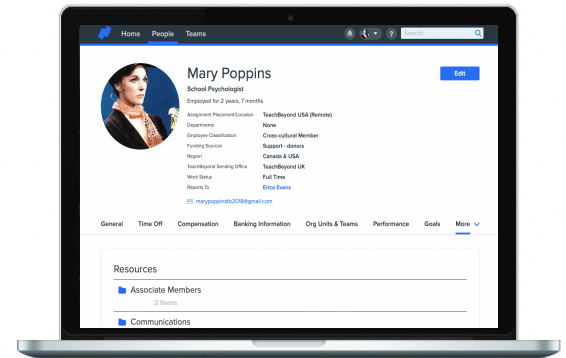
- Insurance Cards & Information (My Profile – Edit mode)
- A copy of your passport (My Profile>My Updates & Documents – Edit mode)



## Resources

You can find a link to the Resources section of Namely on the side bar of either the Home Page or from the menu arrow on your personal profile. Clicking on the link will take you to a series of folders with downloadable documents, links to important sites, and links to forms that will be used to request updates. This section of the Member Portal will continue to be updated.

**YOUR TASK:** Familiarise yourself with what is in the folders. Particularly the folders that are labelled for your TeachBeyond entity.

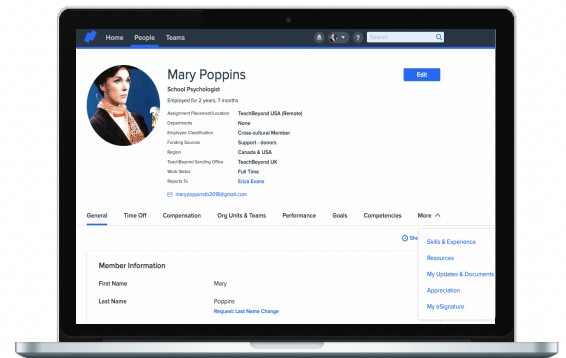


## Under Construction

There are various parts of Namely that are either under construction or only used by administration. Some of these include:

- Time Off, Performance, Competencies, Org Units & Teams and Appreciation.

We will continue to work to improve Namely and update the systems.



## Namely App

Namely has an app! If interested, you can download the Namely app on your iOS or Android device.

