Archived copy of the People and Money updates page

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People and Money-wide updates

Finance, HR and Research Improvement Programme

Please keep up to date with our Finance, HR and Research Improvement programme on the dedicated SharePoint:

Finance, HR and Research Improvement Programme Info Hub

Quarterly Update

The most recent quarterly update took place on Monday 24 March 2025. Along with the changes to Time cards and the launch of Journeys which have replaced Onboarding and Leaver Checklists we have also made some enhancements to Learning Data for Line Managers.

Please read about these changes under the headings below of Time cards, Journeys and Learning Skills and Qualifications.

Finance

Update to Time cards

The updates to Time Cards in People and Money are **complete** and you can now enter March hours.

All Time Cards for March will need to be approved by Payroll by the **10 April**. Any issues please refer to the guidance materials, raise with the HR Helpline, or attend one of our drop in sessions.

The drop-in sessions for Time Cards are planned for 25 March and 01 April.

To access the drop-in sessions and the guidance/recordings from our training sessions, please visit the HR Process and Guidance Hub.

A short demo video has also been prepared as a quick guide walkthrough of the changes, this can be accessed on the HR Process and Guidance Hub and via this link People and Money demo videos.

Training and Engagement

Finance Learning Communities

There are three Finance learning communities available in the People and Money Learning Catalog which you can ‘bookmark’ for easier access. The Finance communities are: Accounting, Financial Compliance and Payments.

Finance Development Hub

Our Finance Development Hub offers a wide range of training resources from hands-on training sessions to user guides to online video tutorials. You can access the Hub via the button below.

A range of finance development and training videos is also available from the Finance Development Channel.

If you have any ideas for future sessions, please get in touch with us by raising a call with the Finance Helpline at finance.helpline@ed.ac.uk

Finance Development Hub

User Guidance and Forms

Process and System User Guides

Our process and system user guides continue to be reviewed and updated as a result of user feedback, process changes and system updates. The guides can be accessed via the People and Money user guide webpage.

Finance Forms

We continue to make updates to the Finance Forms listed on the Finance Forms webpage. Please continue to download and use the latest versions from here.

Human Resources

Changes to Disclosure Scotland PVG Criminal Record Checks

As previously communicated, new legislation impacts criminal record checks managed by Disclosure Scotland from 01 April 2025. This changes how you recruit new staff, including when current employees move roles or change duties. The legislation also applies to students, contractors or visitors to the University. Staff who process PVG certificates for students as part of their programme admissions or placement work should be aware of these changes.

Key changes

- Any new employee in a role that works with vulnerable groups including children, or who supervise people in these roles, **must not** start work without a PVG certificate in place. If the certificate is not in place, employment contracts won’t be issued, and the employee will not be paid.
- It is a requirement to include a clause in any offer letters for applicable roles stating that the offer is being made ‘subject to’ receipt of a valid PVG certificate.

Please can you also ensure you review your teams to identify any staff members who may need PVG certificates but have previously been overlooked. Staff who have changed roles or remits since they started may now require one.

Some staff may not require a PVG certificate in relation to their own role but because of their supervising responsibilities. Therefore, please review any managers who need a PVG certificate because they manage or supervise someone in a role that works with vulnerable adults or children.

Further support and guidance

To support you, we have updated the relevant policy, HR webpages and supporting guidance. Please ensure you use this information as the range of roles that the legislation applies to may be wider than you think:

- **Protection of Vulnerable Groups Policy**
- **Disclosure and PVG checks**
- **Guide to Employment Checks**

We have also updated HR forms and offer letter templates including the Disclosure and PVG Request Form, Job Requisition Business Case, Grading Request Form, Job Description template and the Request for Transfer, Additional Post and Internal Secondment form. Please ensure you use the latest versions from the A to Z list of HR forms and job offer library:

- **A to Z list of HR forms**
- **Job offer letter template library**

If you have any questions please contact the HR Helpline at HRHelpline@ed.ac.uk

Lunchtime Learning

If you would like to find out more about the implementation of the Disclosure (Scotland) Act 2020 legislation, any changes to the University's policy and process, and a deep-dive into Protecting Vulnerable Groups (PVG) checks please sign up for the session on **Thursday 29 May, 12:00 PM – 1:00 PM.**

Sign Up

Journeys

Move from Checklists and Tasks to Journeys in People and Money

The changes to the 'Onboarding' and 'Leavers' checklists and tasks in People and Money are **now live** (effective 24 March 2025) and can be accessed via the Journeys app.

The changes have been worked through with colleagues from schools/departments, who formed a user group to prioritise, feedback on, system test and validate the proposed updates.

The changes you will see are:

- Checklists for new starts, transfers and leavers have been consolidated into a 'Journeys' app, enabling tasks to be tracked and managed in one area.
- A simplified experience, with a different look to tasks
- Fewer notifications
- New user guides and demo videos

New system user guides to support the launch of Journeys can be found on the People and Money user guide webpage:

- Employee Guide to Journeys
- Line Manager Guide to Journeys
- School/Department Administrator Guide to Journeys

Please follow the steps in the new guides to help you get used to the changes in navigation and functionality in People and Money.

Please note Journeys will also replace checklists and tasks related to the Internal Transfers, Rejoining and Employee Separation processes.

A **new video** on Journeys for pre- boarding and onboarding tasks has been developed. Please share this with any pending workers or new starts in your area. This is available on the People and Money Demo Videos webpage. A short video for Line Managers and SDAs is also available.

Additional Support

- Review the **recordings and slides** from the earlier training sessions available via the HR Process and Guidance Hub.
- Review the **Common Questions** available on the HR Process and Guidance Hub.
- **Drop-in sessions** will be available for Line Managers and SDAs. They have been planned for the 26, 27 March and the 3 April. To access the link to the drop-in sessions please visit the HR Process and Guidance Hub. Please note these are not bookable, please just join on the day if you have a question to raise.

- You can also contact the **HR Helpline,** please raise a **Service Request** using the category ‘Resourcing’ in the first instance.

Learning Skills and Qualifications

Learning data is visible in People and Money to managers from My Team> Learning. Data is available for their direct reports and all employees in their reporting line. With effect from Monday 24 March, managers will be able to apply additional filters to the data, including by course title, enrollment status, plus enrollment and completion dates, to support the monitoring of their team’s learning, and export their search results.

Managers will also be able to download the data for their direct reports and all employees in their reporting line. Senior managers can also choose to download data relating to direct reports of a specific manager in their hierarchy. Please ensure that any downloaded reports are stored in accordance with the University’s Data Protection and Records Management guidance.

We are finalising improvements to a new Learning Report and will communicate once this is live. We will continue to publish the monthly Learning Transcript report to Senior managers, local staffing teams and HR Partners in the meantime.

The guide on How to Manage Team Learning for Line Managers has been updated to reflect the changes, please read this for more detailed guidance. If you have any questions please raise a Service Request using the category Learning and Development.

Policy Launches

Neonatal Care Leave and Pay

From 6 April 2025, the University is introducing Neonatal Care Leave to support parents of newborns requiring neonatal care. The aim of this leave is to allow eligible parents dedicated time to spend with their babies in hospital, without using up their other family leave entitlements (e.g., maternity, partner, shared parental or adoption leave).

Eligible parents will also be entitled to statutory Neonatal Care Pay. This will be paid at the statutory rate or 90% of average weekly earnings (whichever is less).

The University is extending statutory Neonatal Care Leave to parents of babies born before 6 April 2025, who meet the eligibility criteria, provided the leave is taken within 68 weeks of the child’s birth.

You can find more information about Neonatal Care Leave in the family leave policies on the HR A – Z of Policies. There is also a dedicated webpage with supporting guidance and FAQs.

Staff who think they could be entitled to Neonatal Care Leave should speak to their manager who can book their leave using the relevant booking form on the HR A–Z of Forms webpage.

If you have any questions about Neonatal Care Leave, please contact the HR Helpline by raising a Service Request and using the new category ‘Neonatal Care Leave’.

Updated Relocation Policy

We are pleased to announce that the University’s Relocation and Partner Career Transition policies have been updated and merged into a single, streamlined policy. The revised policy provides better clarity on eligibility, tax implications and exceptional processes relating to Grade 10s, and better reflects actual practice.

The focus of this review was to improve transparency and alignment with regulatory bodies. No major changes were made, e.g. to eligibility criteria, inclusions/exclusions, allowance or repayments.

Please note: This will mean that the old Partner Career Transition Policy and associated application form has been decommissioned.

This policy update impacts all schools and departments and is important for hiring managers to be aware of for their new eligible staff. We encourage everyone to review the updated Relocation Policy and further information on our Relocation Support webpages.

Reporting

Starters and Transfers Report

Following user feedback a small change has been made to the HR Reports> Starters and Transfers report to add two new columns to make it clearer what action has been taken on the Assignment Start date.

1) Action Name e.g. Add Pending worker, Hire, Transfer, Secondment, Add assignment, Rehire an Employee

2) Action Effective start date

Training and Engagement

Launch of New e-learning - Internal Employee Transfer Course

Colleagues have told us that one of the areas within the Recruitment process that can be quite confusing, is how to complete an internal employee transfer.

We have created a short self-paced e-learning course on this very topic!

The purpose of this course is to provide a quick overview of the steps required to do an internal transfer of an employee within the People and Money system, whether that be an advertised or non-advertised post. We highlight some key points to be aware of when doing an internal transfer. The learning also introduces two Journeys needed when an individual transfers: The "Moving roles - Tasks to complete in your current role" Journey and the "Getting started in a new role" Journey.

The course will take approximately 30 minutes to complete, and you can self-enrol from this link:

Link to Internal Employee Transfer e-learning

If you have any questions about the course or encounter any challenges when completing it, please raise a Service Request via People and Money, using the category "Continuous Improvement".

Regular Training and Engagement Sessions

Colleagues have previously told us that there needs to be more and improved training on HR processes for new and existing staff, Line Managers and School/Department Administrators (SDAs). We have also been told that a mixed model of learning resources would be beneficial.

As part of our HR Improvement Plan, the HR Process Improvement Team are now offering the following:

- A calendar of regular and ad hoc learning and engagement sessions on HR processes and procedures, and the People and Money system. These sessions are aimed at different 'audiences', depending on the topic – all employees, Line Managers, School/Department Administrators (SDAs)/those with SDA access in the People and Money system, and others. The calendar will be published quarterly.
- A monthly lunchtime learning session for SDAs/those with SDA access in the People and Money system. These sessions are also open to any line manager or HR colleague who might find them useful to attend.

To sign up

View the calendar of events and follow the links to sign up for the session(s) you wish to attend via the HR Process and Guidance Hub

Calendar of Events

To listen to recordings

If you are unable to attend any session, we will record all sessions and make the recordings available afterwards.

Recent Recordings

We hope these new offerings will contribute towards an improved employee experience of our HR processes and the People and Money system.

If you have any ideas for future sessions, please get in touch with us by raising a Service Request using the category ‘Continuous Improvement’.

User Guidance and Forms

HR Forms

We continue to make updates to the HR Forms listed on the HR A-Z webpage. Please continue to download and use the latest versions from here.

Process and System User Guides

Our process and system user guides continue to be reviewed and updated as a result of user feedback, process changes and system updates. The guides can be accessed via the People and Money user guide webpage.

If you have a suggestion to make for the HR Forms or User Guides, please raise a Service Request using the category "Continuous Improvement".