System User Guide

How to Edit Your Personal Details in the System

We realise this formatting may not be accessible for all – to request this document in an alternative format please email HRHelpline@ed.ac.uk

Contents

Introduction

This guide covers key tasks for **Employees** in **'How to Edit your Personal Details in the System'** system process.

New Employees – As part of your onboarding tasks and joining experience you will be asked to provide certain personal data to the People & Money System.

This guide covers how to update your:

- Personal Details (Title, First Name, Middle and Last, and Preferred Name)
- Demographic Information (Marital/Civil Partnership Status, Ethnicity, Gender)
- Biographical Information (Disability Information)
- Protected Characteristics (Religion or Belief, Sexual Orientation, trans or have a trans history, Gender Identity).
- Identification Information (Nationality and Driver's licenses)

To find out more about the work we are doing to meet the requirements of the Equality Act and what we do with your data please visit our [Staff Equality Data Collection and Monitoring](#) webpages.

The University holds and processes personal data about individuals such as employees, students, graduates and others, defined as 'data subjects' by the law. Such data must only be processed in accordance with the UK General Data Protection Regulations (UK GDPR) and the Data Protection Act (DPA). For further information please see the [Data Protection webpages.](#)

Please note:

1. When making a professional title change, you must also upload a copy of your degree certificate to Document Records otherwise your request will be rejected. For guidance on uploading documents to Document Records, refer to the user guide titled [Employee Guide – How to search, view and upload document records](#).
2. Your Disability Info will not be shared with your Line Manager or anyone in your School/Department when you update this information. To notify your Line Manager, please schedule a conversation with them.
3. You can change your marital/civil partnership status in People & Money without documentary evidence. You may choose to notify HMRC and your pension provider(s) of the change to your marital/civil partnership status, in order to take advantage of any associated benefits.
4. You can change your name in People & Money without documentary evidence. You may choose to notify HMRC and your pension provider(s) of the change to your name. If you wish to have your email address and/or UUN updated then you will need to contact the IS Helpline at [UniDesk@ed.ac.uk.](mailto:UniDesk@ed.ac.uk)

5. When you update your name on the system, you will need to sign out and back in again to see the name change against your record.

6. You will receive a notification (by email and in People & Money) to confirm any changes that you have made. Some changes that you make will result in a 'pending approval' message this is system approval only, your line manager will not be sent notification of your changes. You will need to sign out and back in again to see the changes in your record.

7. If you notice that your national insurance number is incorrect or missing, please raise a service request under 'National Insurance' for this to be updated.

In Brief

This section is a **simple overview** and should be used as a reminder. More detailed information, screenshots and tips is provided within the 'In Detail' section.

Navigating to Personal Details

1. From the Home page, open the **Me** section, then click **Personal Information.**
2. Select **Personal Details.**

Editing your Name

a. In the Name section, click the **pencil icon** to edit your **Title, First Name, Preferred Name, Middle Name** and **Last Name.**

   Note: You **must** provide a **Preferred Name**. This is the name that will be displayed on the staff directory for all staff to view.

b. Click **Save.**

Adding your Photo

a. In the Photo section, click the **pencil icon** to add or edit your **Photo.**
b. **Drag and drop** or **select** an image.
c. Click **Save.**

Adding or Editing your Demographic Info

a. In the Demographic info section, click the **pencil icon** to add or edit your **Marital/Civil Partnership Status**, **Gender** and **Ethnicity.**

   Note: The Gender field informs HMRC so only binary gender is permitted to be updated. However, to update the non-binary options employees can update their Protected

Characteristics within the Additional Person Info section (Me>Personal Information>Additional Person Info).

b. Click **Save**.

Editing your Biographical Info

a. In the Biographical info section, click the **pencil icon** to add or edit your **Disability** and

Biographical Info.

b. Click **Save.**

Updating your Additional Person Info

1. From the Home page, open the **Me** section, then click **Personal Information.**
2. Select **Additional Person Info.**
3. Use the dropdown menu and select **HESA (Person)** or **Protected Characteristics.**
4. Click the +**Add button** or the **pencil icon** to edit your information.
5. Click **Save**.

Viewing and updating your Identification Info

1. From the Home page, open the **Me** section, then click **Personal Information.**
2. Select **Identification Info.**
3. From here you can view your **Nationality**.
   Note: You will not be able to edit this field. If you wish to add or edit this field, please raise a service request using the category 'Right to Work'.
4. In the **Driver's licenses** section, click the +**Add button** or the **pencil icon** to edit your information.
   Note: this section only needs to be completed if driving forms part of your role at the University.
   a. Complete the relevant fields.
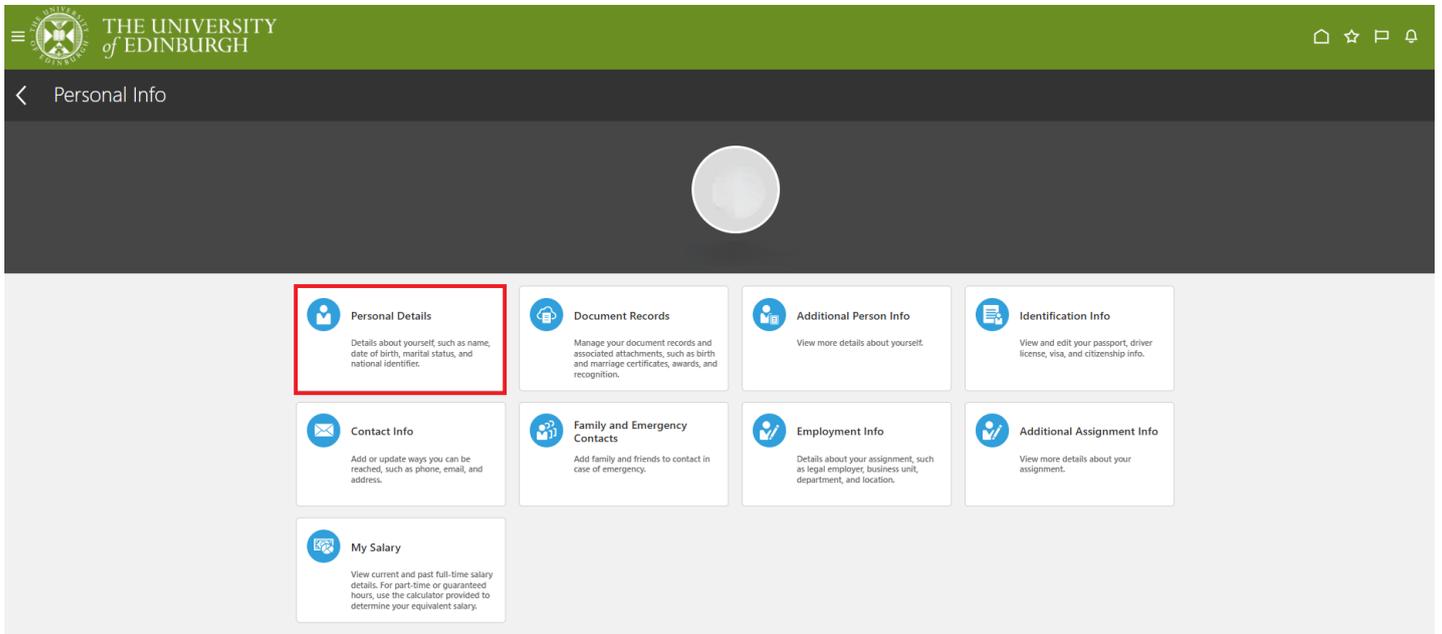   b. Click **Save.**

In Detail

This section provides the detailed steps and includes relevant screenshots from the system.

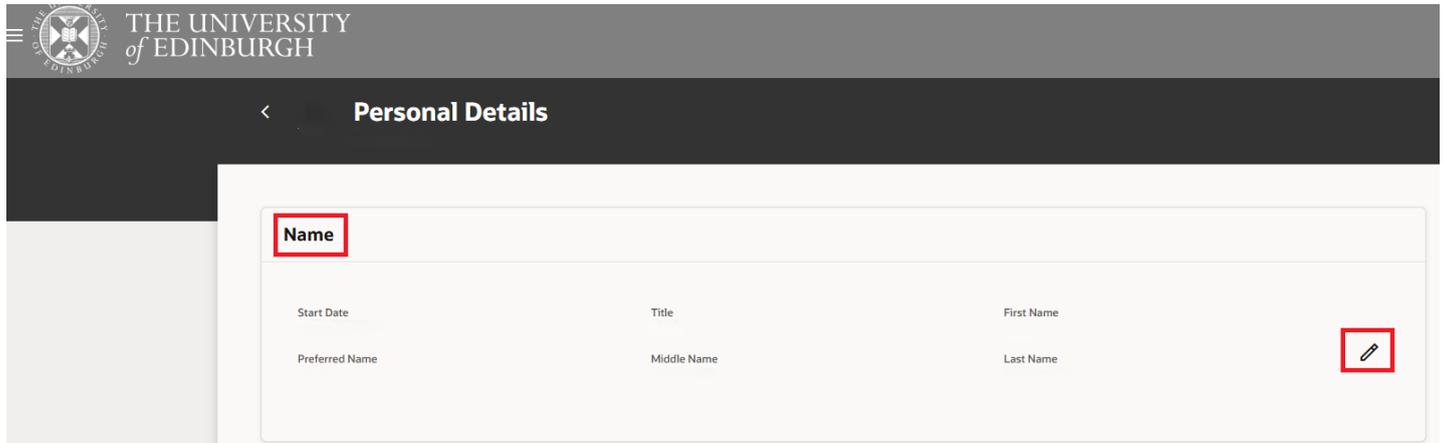1. From the Home page, click **Me**, then click **Personal Information.**
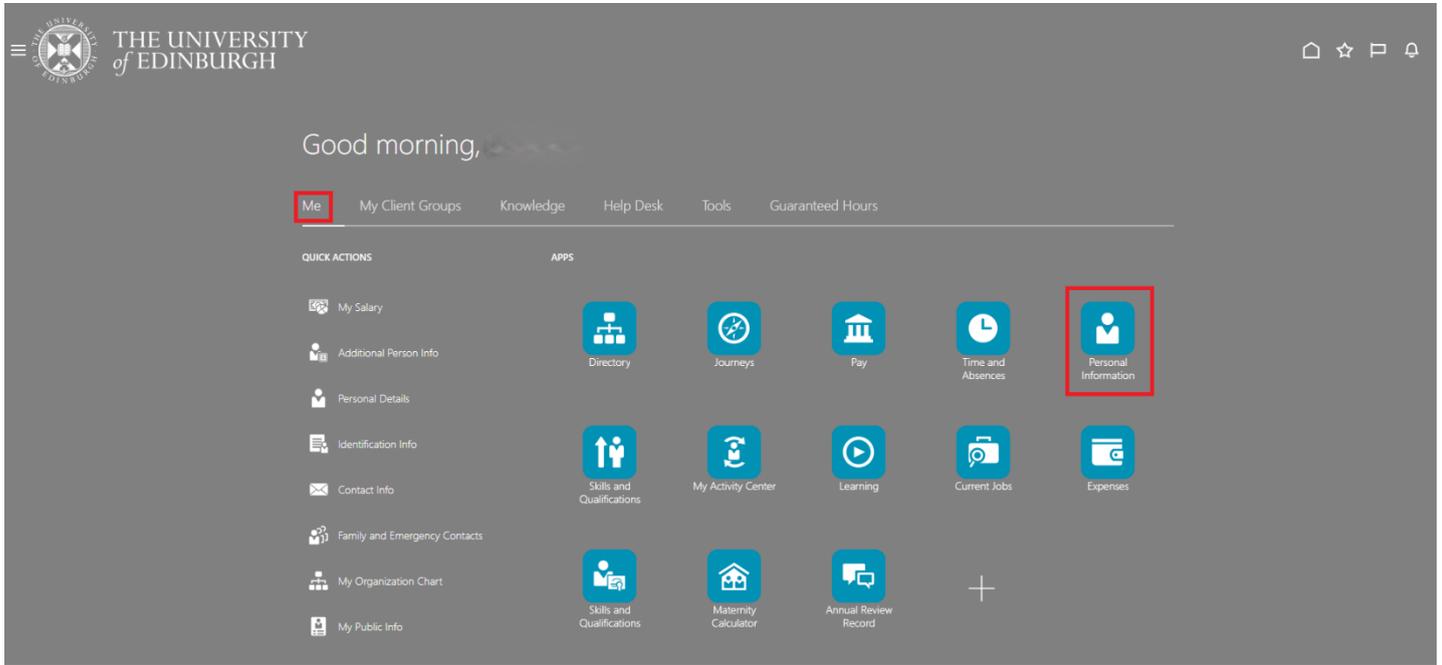
2. Select **Personal Details.**
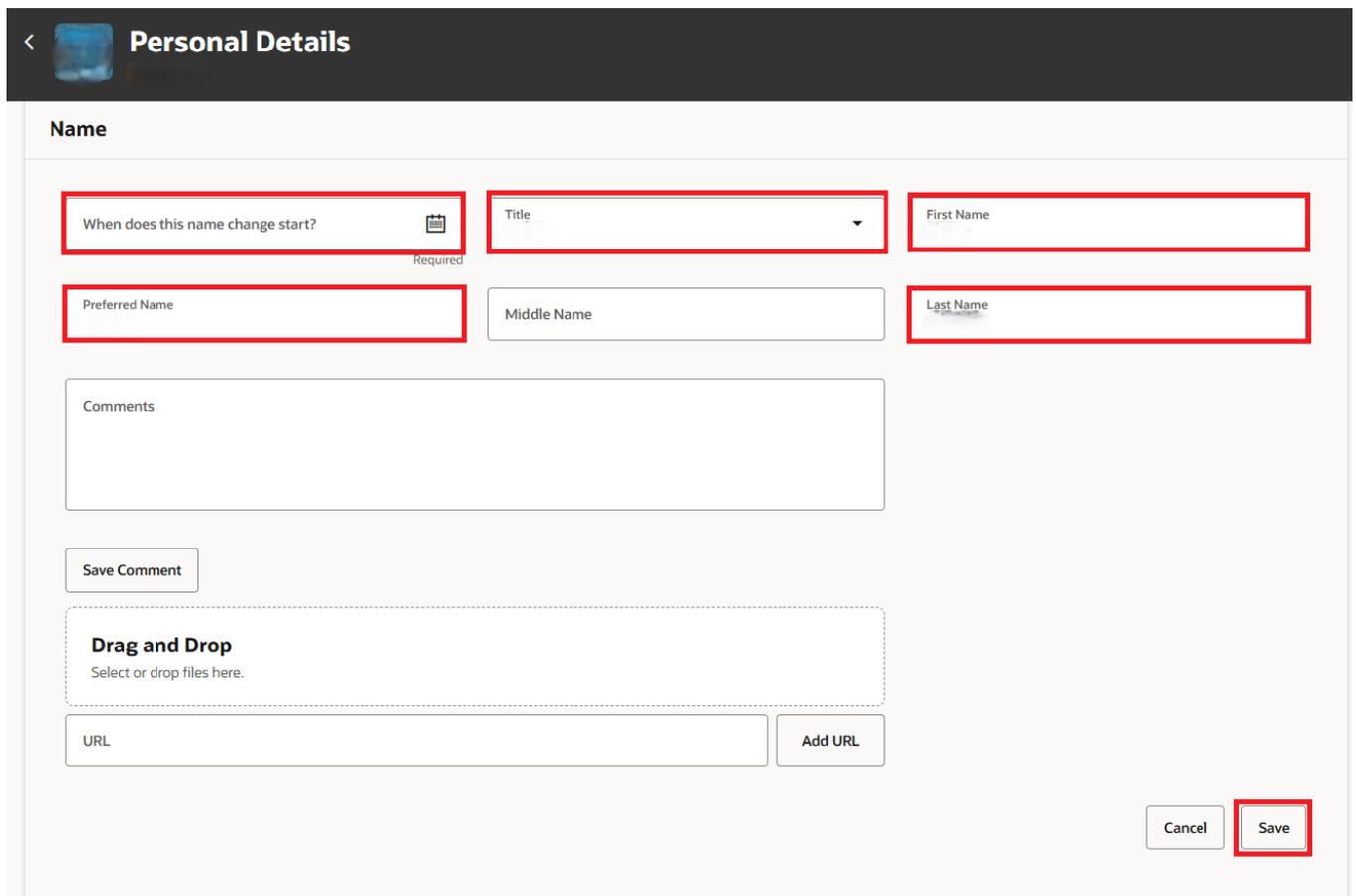
Editing your Name

a. In the **Name** section, click the **pencil icon**.

b. Enter the **date** on which this name change starts and edit the appropriate fields:
- **Title**
- **First Name**
- **Preferred Name**
- **Middle Name**
- **Last Name**

Notes:

- You **must** provide a **Preferred Name**. This is the name that will be displayed on the staff directory for all staff to view.
- Please avoid using special characters wherever possible.
- As these fields are free-text, ensure you use the correct spelling and avoid extra spaces.
- If you are **correcting** a mistake in your name, please ensure the **date** matches the previous dated change.
- When you update your name on the system, you will need to sign out and back in again to see the name change against your record.
- When making a professional title change, you must also upload a copy of your degree certificate. Please **do not use Drag and Drop** to add this in, instead upload your certificate in your **Document Records** otherwise your request will be rejected. For guidance on uploading documents to Document Records, refer to the user guide titled [Employee Guide – How to search, view and upload document records.](#)
- If you add in a comment, ensure you click **Save Comment** before saving the changes.

c. Once complete click **Save.**

Adding your Photo

a. In the Photo section, click the **pencil icon** to add or edit your **Photo.**

b. **Drag and drop** or **select** an image.

Note: When you update your photo in the system, you will need to refresh the page to see the change in your profile picture.

c. Once complete, click **Save.**

Adding or Editing your Demographic Info

    a. In the Demographic info section, click the **pencil icon**.

    b. Add or edit the following information:

- **Marital/Civil Partnership Status**
- **Gender -** The Gender field informs HMRC so only binary gender is permitted to be updated. However, to update the non-binary options you can update this within Additional Person Info (Me > Personal Information > Additional Person Info). See Updating Your Additional Person Info below.
- **Ethnicity**

If you do not wish to answer the question, you can select **'Prefer not to say'.**

Note: When editing your Marital/Civil Partnership Status you will be asked to confirm when this marital status change starts.

Tip:

- If you add in a comment, ensure you click **Save Comment** before saving the changes.

c. Click **Save.**

Editing your Biographical Info

a. In the Biographical info section, click the **pencil icon.**
    Note: **Date of Birth** and **Age** are not editable fields.

b. Add or edit the following information, selecting the appropriate value from the drop down using the guidance in the table below:

Field Name	Further information
HESA Disability 1, 2, 3 4	This field records whether you consider yourself to have a disability. When answering this question, a disability is defined in law as an impairment, health condition or learning difference that has a substantial or long-term impact on your ability to carry out day-to-day activities. You can record up to four types of disability. If you do not wish to answer this question you can select **"Prefer not to say"**.
British Sign Language User	This field records whether or not you are a British Sign Language user. If you do not wish to answer this question you can select **"Prefer not to say"**.
HESA Previous Institution	You only need to complete this if you have previously worked for a UK Higher Education Institute (HEI). If you cannot find your previous institution select "Higher education institution (HEI) not listed/not known".
HESA Highest Qualification	Please select the highest qualification you currently hold.
HESA Previous Employment	Please select the option which most closely matches your employment situation before joining the University.

Note: We use the term 'HESA Disability' to harmonise our data reporting to the Higher Education Statistics Agency (HESA).

Tip:

- If you add in a comment, ensure you click **Save Comment** before saving the changes.

c. Once complete click **Save.**

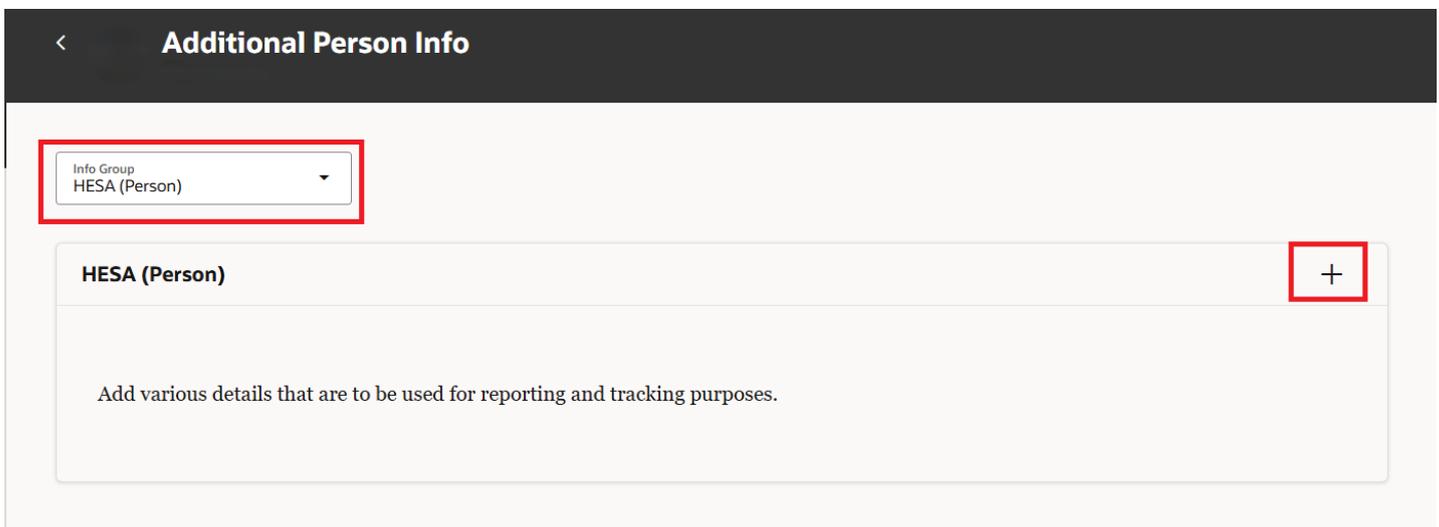## Updating your Additional Person Info

1. From the Home page, open the **Me** section, then click **Personal Information**.

2. Select **Additional Person Info.**

3. Under **Info Group**, select **HESA (Person)** from the drop-down menu.

4. Click the +**Add button** if there is no information recorded or to edit any information click the **pencil icon.**

5. Enter the following information using the guidance in the table below:

Field Name	Further Information
HESA Academic Teaching Qualification 1	Select the teaching qualification that most closely matches your accreditation. **If you are not in a teaching role** or do not hold a teaching qualification select "No academic teaching qualification held".
HESA Academic Teaching Qualification 2-6	You only need to complete these fields if you hold more than one teaching qualification.

6. Once complete, click **Save.**

7. Under **Info Group**, select **Protected Characteristics** from the drop-down menu.
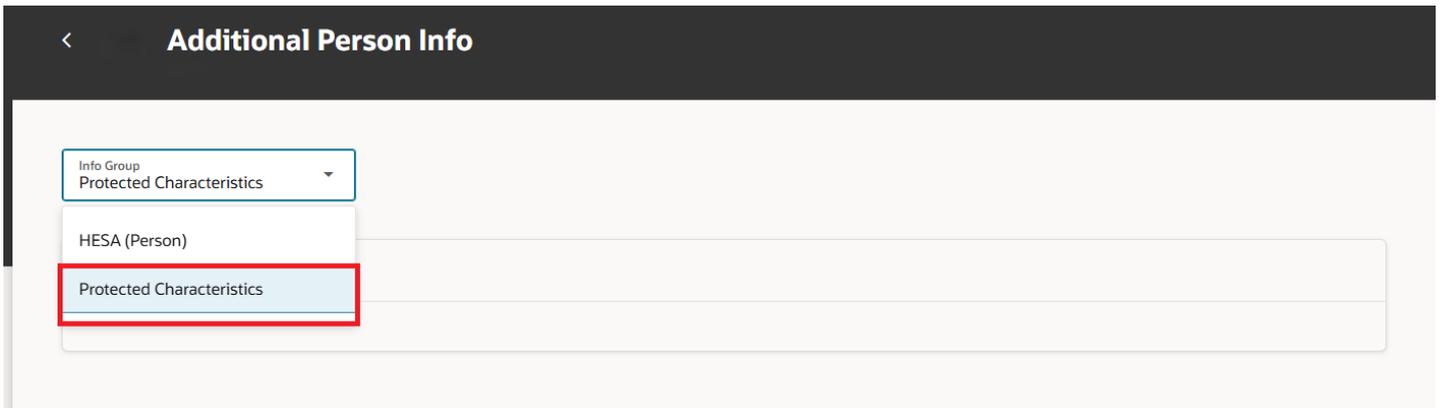
8. Click the +**Add button** if there is no information recorded so far or to edit any information click the **pencil icon** and update the following information:

- **Effective start date**
- **Religion or Belief**
- **Sexual Orientation**
- **Do you consider yourself to be trans, or have a trans history?**
- **Gender Identity**

If you do not wish to answer the question, you can select "**Prefer not to say**".

9. Then click **Save.**

Tip:

- Non-UK/Irish Staff

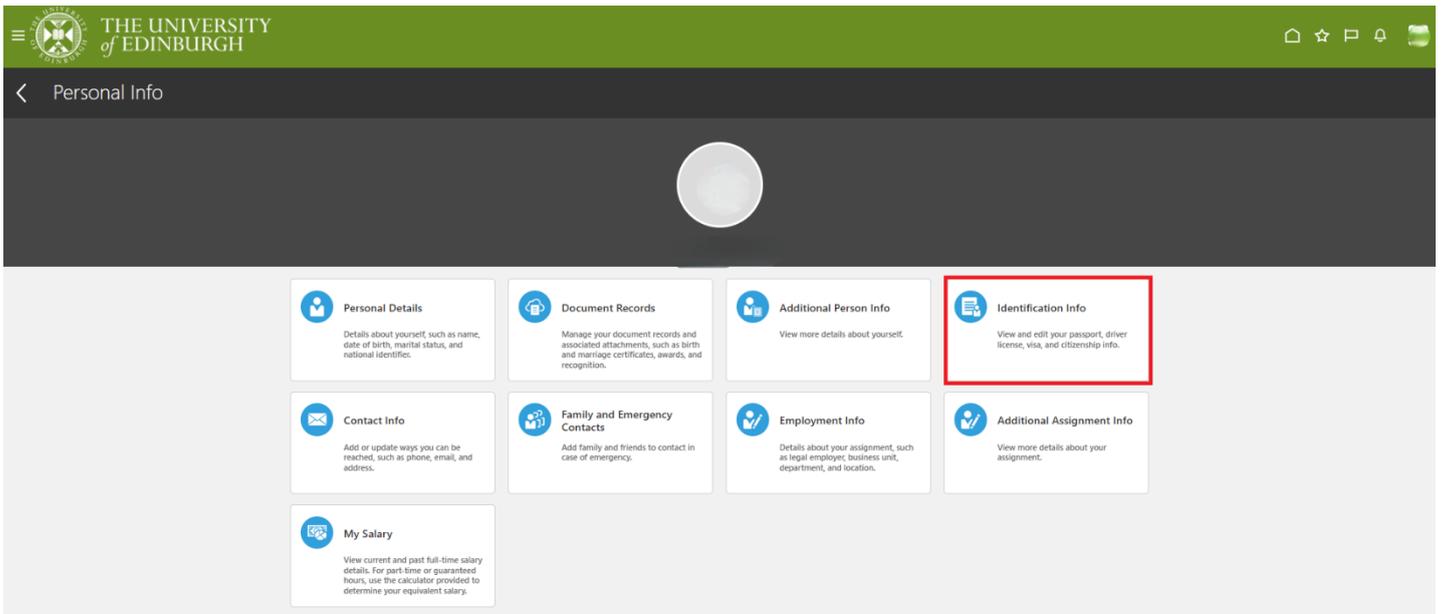 If you are making any changes to your name and gender details in the People & Money system, you are responsible for reporting a change of circumstances and updating visa/BRP documentation as required by UK Visas and Immigration (UKVI). A failure to update official documentation means you may be liable for a fine or a shortening of your stay. Staff who hold visas can find more information on the requirements of UKVI at the UK Government website.

  Staff with EU settlement status can find more information on the requirements of UKVI at the UK Government website.

  If you have a time-limited right-to-work (RTW) and you make any changes to your name and gender details, you will be required to provide documentation as necessary at a repeat RTW check as outlined on the University webpage at University of Edinburgh RTW Guidance.

Viewing and updating your Identification Info

1. From the Home page, open the **Me** section, then click **Personal Information.**
2. Select **Identification Info.**

3. From here you can view your **Nationality**.
   Note: You will not be able to edit this field. If you wish to add or edit this field, please raise a service request using the category 'Right to Work'.

4. In the **Driver's licenses** section, click the +**Add button** or the **pencil icon** to edit your information.
   Note: this section only needs to be completed if driving forms part of your role at the University.

THE UNIVERSITY of EDINBURGH

Nationality

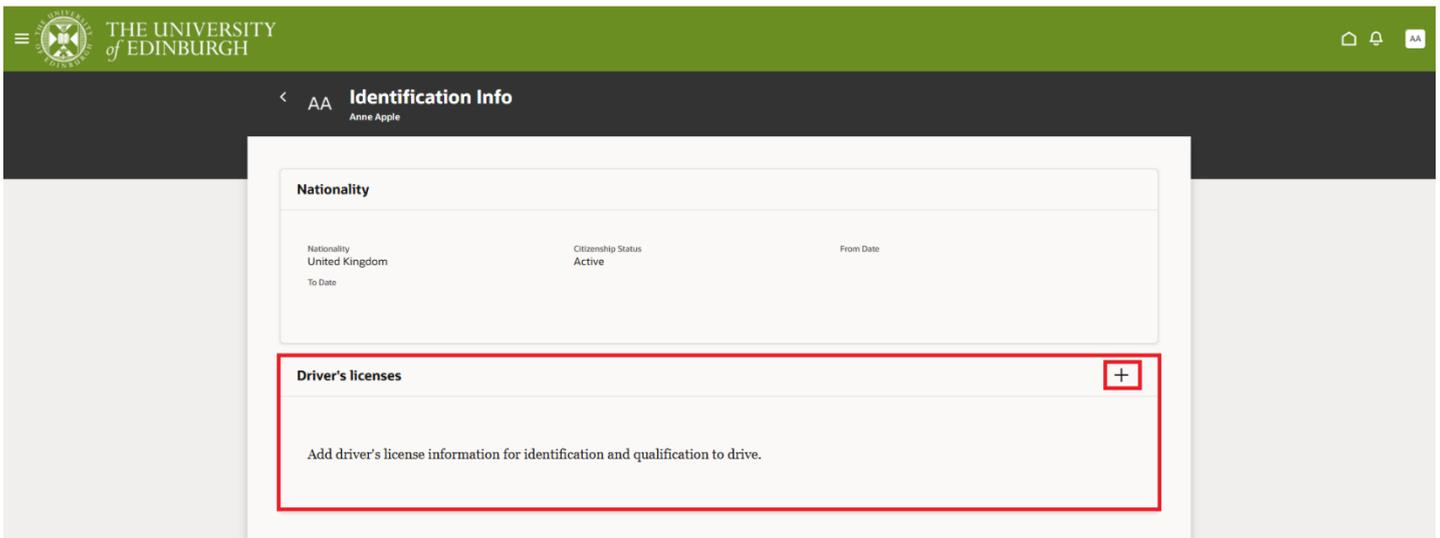| Nationality | Citizenship Status | From Date |
| United Kingdom | Active | |
| To Date | | |

Driver's licenses +

Add driver's license information for identification and qualification to drive.
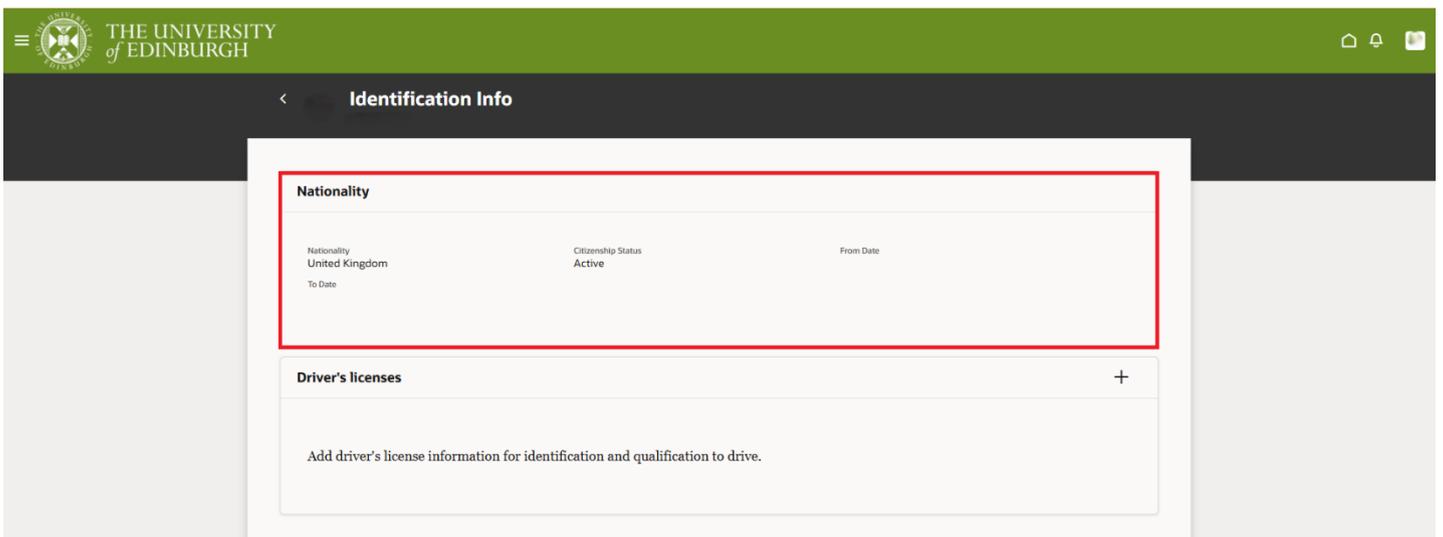
a. Complete the following fields:
- **Issuing Country** – this will default to the United Kingdom. Please do not change this.
- **Licence Type –** this is a dropdown option, select as appropriate.
- **License Number –** as appropriate.
- **Issuing Authority** – as appropriate.
- **From Date** – as appropriate.
- **Place of Issue** – as appropriate.
- **Comments –** as appropriate.
- **Attachments -** as appropriate (Drag and Drop OR Click and Select).

Driver's licenses +

Issuing Country
United Kingdom ▼

License Type ▼

License Number

Issuing Authority

From Date 📅

Place of Issue

Comments

Save Comment

Drag and Drop
Select or drop files here.

URL | Add URL

Cancel | Save

Tip:

- If you add in a comment, ensure you click **Save Comment** before saving the changes.

b. Click **Save.**

Version History

Version	Date	Description	Approved By
1.0	04 August 2025	• Transferred guide to new template • Replaced all screenshots to reflect the new look of the Redwood screens • Added in table for Editing Demographic Info • Added in steps on how to update HESA (Person) information • Added in how to view and update Identification Info section	M Easton 01/08/25
1.1	23 February 2026	• Updated for 26A – added tip for comments	RM/HH 17/02/2026

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.