Guide to Service Requests

Background

This guidance provides information on the Service Request categories available within People and Money Helpdesk for Human Resources, as well as guidance on which categories that should be used if you require additional assistance with an HR Policy or Human Resources People and Money User Guide. In the first instance, if you have any questions at all to do with HR, Payroll, timecard processes or the People and Money system, please search People and Money's in-system guidance - My Knowledge – first. To search My Knowledge, log in to People and Money, choose 'Help Desk' and then 'My Knowledge'. This will give you information tailored to your specific query and role, ranging from user guides to videos.

In accordance with our Human Resources Process User Guides and HR Forms, you may be required to submit a Service Request to complete an HR or Payroll Task. The information below also explains which forms should be submitted along with these requests. By selecting the appropriate category, your Service Request will be automatically routed to the appropriate team for processing in the first instance, avoiding any unnecessary delays.

What is a Service Request?

The term Service Request is used to describe a help ticket which is opened within People and Money. The ticket is then sent to the HR Helpline for review and response or sent on to other HR teams or Payroll Services to process as needed. **Please note, if you have a query about Finance processes, please contact Finance.Helpline@ed.ac.uk for support.**

Wherever feasible, we urge all users who need HR support to **submit their Service Requests through the People and Money Helpdesk App**, as this route allows you to type the relevant category name as indicated below into the category box and add attachments to the Service Request. This will ensure your Service Request is sent to the correct team in the first instance and dealt with as effectively as possible.

May 2024 V5.0

We would also recommend that customers include a meaningful 'Title' in their request. For example, if your request is about a specific payroll, please include this in the title. This will ensure that your request can be prioritised appropriately.

If you do not have access to People and Money, Service Requests can be created via an email to HRHelpline@ed.ac.uk.

Further guidance on raising a Service Request is available within the How to raise and maintain a Service Request Enquiry user guide, which can be found under the ‘My Knowledge and Service Requests’ header.

Useful Links

People and Money User Guides
How to search My Knowledge
People and Money End to End User Guides
People and Money Updates
HR A-Z Forms
HR A-Z Policies
Finance Specialist Services SharePoint
Pay dates

Service Request Categories

Category	Description	Attachment required	Useful Links
Absence Management	Use this category to get answers to any questions you have about Absence Management. Questions that can be asked under this category may include the following: - Absence Policy Queries - Recording absences - Queries about sick pay entitlements - Ending an absence on People and Money - Queries about Phased Return		Absence Management Policy https://www.ed.ac.uk/staff/services-support/hr-and-finance/people-and-money-system/people-and-money-user-guidesGuide to Sickness Absence
Academic Promotions	Use this category to get answers to any questions about the Academic Promotions policies and processes.		Academic Promotions
Acting Up	Use this category to get answers to any questions you have about an acting up allowance. Questions that can be asked under this category may include the following: - How to add an acting up allowance to an Employee's assignment on People and Money? - How to end an acting up allowance on People and Money? **Please see the 'Add, amend or end allowance' category to make any acting up allowance changes.**		Conditions of Service and other Policies Guide to Employment and Finance Approvals

Add a new work location	Use this category to add a new work location to the People and Money system if it is not currently available.		
Add new work schedule	Use this category to add a work schedule to People and Money if it is not currently available. Use the Work Schedule calculator to generate the Work Schedule Name and attach this to the request.		Guide to Work Schedules Work Schedule Calculator
Add, amend or end an allowance	Use this category to add an allowance to an Employee's record or to change/end an existing allowance. The Add, Amend, End Allowance Form should be submitted with any new or allowance changes. This form MUST be authorised in advance of submission in Section 5. For further information on approvals, please read the Guide to Employment and Finance Approvals. This Service Request should be submitted by the 7th of the month for processing within the current pay period.	*Add, Amend, End Allowance Form*	Guide to Job Changes Conditions of Service and other Policies Guide to Employment and Finance Approvals.

Add Missing Content to Option Lists	All Employees can update their skills and qualifications through Me > Skills and Qualifications within People and Money at any time. Line managers can view and update their direct reports learning, skills and qualification record and will approve any additions to Licences, Certifications and Registration. If the qualification, licence, certification, or registration is not listed you can request that this be added by using the SR category and attaching a completed Request for additional qualification, license or certificate.	*Request for additional qualification, licence or certificate*	Guide to Learning, Skills and Qualifications for Employees and Learners Guide to Learning, Skills and Qualifications for Managers
Adoption/Surrogacy Leave	Use this category to get answers to any questions you have about Adoption or Surrogacy Leave. Questions that can be asked under this category may include the following: - Adoption/Surrogacy Leave Policy queries - What is required to take Adoption/Surrogacy Leave? - Adoption/Surrogacy Leave Entitlement - Adoption/Surrogacy Pay - Supporting an Employee going on Adoption/Surrogacy Leave - What happens to Annual Leave whilst on Adoption/Surrogacy Leave? - Returning from Adoption/Surrogacy Leave - Changing work pattern or working hours after Adoption/Surrogacy Leave		Adoption and Surrogacy Leave Policy Guide to Adoption and Surrogacy Leave

Advertising	Use this category to get answers to any questions you have regarding advertising job vacancies. Questions that can be asked under this category may include the following: - How to advertise a new role externally? - How to advertise a new role internally? - Advertising timescale requirements - In what cases is advertising required? Line Managers/Hiring Managers or SDAs can use this category to request a job to be re-advertised should there be no successful candidates in the first round of recruitment. This category can also be used should you need to extend the advertisement of the job vacancies.		Guide to Recruitment & Onboarding Process
Agency Workers	Use this category to get answers to any questions you have about hiring agency workers. Questions that can be asked under this category may include the following: - How to hire Agency Workers? - Hiring an Agency Worker who is off framework		Agency Workers - Hiring Policy
Agreement for Intermediary Workers	This category should be used to add Intermediary Workers that are 'in scope' of IR35 to The University Payroll for the purpose of PAYE Tax and National Insurance. This Service Request should be submitted by the 3rd of the month	*Agreement for Intermediary Workers (Form 111)*	Intermediary Worker Employment/IR35 Status Agency Workers and Interim Contractors

May 2024 V5.0

	for processing within the current pay period. Please note, the Form 111 should only be submitted once an employment status check has been carried out.		
Allowances	Use this category to get answers to any questions you have about Allowances. Questions that can be asked under this category may include the following: - Adding an allowance for an Employee currently in post - Changing an allowance - Adding allowance for New Hires **Please see the 'Add, amend or end allowance' category to make any acting up allowance changes.**		Guide to Job Changes Conditions of Service and other Policies Guide to Employment and Finance Approvals
Amend or cancel a termination	To amend or cancel a termination, submit this Form category as soon as possible. Please be aware, if the termination is not cancelled or amended prior to the payroll cut off, the Employee's pay may be incorrect.		How to process terminations
Amendments to Employee record	Use this category to get answers to any questions on how to update your record or an employee's record. Line Managers can also use this category to seek adjustments to an employee's record if they find an issue, such as an inaccurate job title.		

Annual Leave	Use this category to get answers to any questions you have about Annual Leave. Questions that can be asked under this category may include the following: - Annual Leave balance queries - Annual Leave carry over - Annual Leave entitlement queries - Requesting Annual Leave in People and Money - Cancelling Annual Leave in People and Money - Approving Annual Leave requests		Conditions of Service and other Policies Annual Leave Calculator Annual Leave Policy Guide to Annual Leave

Annual Review Process	Use this category to get answers to any questions about the Annual Review Process. Questions that can be asked under this category may include the following: - What should be discussed at an annual review? - Information on setting objectives		

Appeals	Use this category to get answers to any questions about the appeals policies and process. Questions that can be asked under this category may include the following: - How to appeal against a disciplinary decision? - How to appeal against a grievance decision?		Disciplinary Policy Grievance Policy
Applications	Use this category to get answers to any questions you have about managing applications for external or internal posts at the University. Questions that can be asked under this category may include the following: - How to withdraw an application on People and Money? - Adding further documentations to an application - How to add an application to a job requisition for an offline candidate? - Submitting late applications - How to sign up for job alerts? Hiring Managers can also use this category to request for HR to add late applications to job requisitions. Use ‘Late application’ along with the job requisition name and number in the title of your service request and include: - Applicant's name - Title - Source of application, e.g.: LinkedIn, email etc.		Guide to Recruitment & Onboarding Process

	- Email address and phone number - Their CV, as an attachment		
Apprenticeships	Use this category to get answers to any questions you have regarding youth career initiatives such as Career Ready and Modern Apprentice Programmes.		
Bank Details	Use this category to get answers to any questions you have about updating your bank details. Questions that can be asked under this category may include the following: - How to change bank details? - Requesting a bank detail change for Casual Worker/External Examiners and Non-Taxable Scholarship holders		[How to update bank details]()

Cancel Hire	If an Employee is a no show or has advised the University that they do not wish to start employment, Line Manager's should use the enquiry category to let HR know. HR will subsequently cancel the work relationship. For further information on this, please see the 'Cancel of Hire' section of the Guide to Recruitment and Onboarding.		[Guide to Recruitment & Onboarding Process]()

Capability Policy	Use this category to get answers to any questions about the Capability Policy. The HR Helpline are only able to refer you to relevant sections of The Policy and cannot provide you with advice. Employees should speak with their Line Manager regarding any capability concerns in the first instance. If a Line Manager wishes to take any formal action, they should contact a HR Advisor/Partner prior to this. To contact an HR Advisor directly, see the CASE tab.		Capability Managing Capability Policy
Career Development	Employees can support their career development by accessing the latest University courses and learning offerings via the Learning, Skills and Qualification Apps on People and Money. If you have any specific questions around this, use this category to contact the HR Helpline Team who will refer your query to a Specialist Team for assistance.		Guide to Learning, Skills and Qualifications for Employees and Learners Guide to Learning, Skills and Qualifications for Managers
Casual Worker	Use this category to get answers to any questions about Casual Worker processes and policies. Questions that can be asked under this category may include the following: - Questions about the Conditions of Service of a Casual Worker - How to pay a Casual Worker?		Conditions of Service - Casual Workers Casual Payroll

Change grade or salary of an Employee	This category can be used by a HR Advisor to downgrade or upgrade an Employee's assignment following academic promotions, regrading of professional services jobs, out of cycle, grade 10 review and downgrading to assignments following restructures etc. With this request, please provide details of pay protection elements if these are required. Where the change relates to an annualised or fractional contract, please specify this in the service request. For an annualised contract, please provide details of weeks worked up to the date of change and for a fractional contract the hours worked up to the date of change. HR Operations will then make the appropriate updates to the Employee's assignment on the back of the request.	*Regrading Request Form (Professional Services)*	Guide to Job Changes
Change grade or salary of group of Employees	This category can be used by a HR Advisor to downgrade or upgrade multiple Employee assignment following academic promotions, regrading of professional services jobs, out of cycle, grade 10 review and downgrading to assignments following restructures etc. With this request, please provide details of pay protection elements if these are required. Where the change relates to an annualised or fractional contract, please specify this in the service request. For an annualised contract, please provide details of weeks worked up to the date of change and for a fractional contract the hours worked up to the	*Regrading Request Form (Professional Services)*	Guide to Job Changes

	date of change. HR Operations will then make the appropriate updates to the Employee's assignment on the back of the request.		
Change in contract type	Use this category to get answers to any questions you have about changing a contract type.		Conditions of Service and other Policies
Changes in hours and work schedule	Use this category to get answers to any questions you have about hours or work schedule changes. Questions that can be asked under this category may include the following: - How to change an employee's hours and/or work schedule on People and Money?		Guide to Work Schedules Guide to Job Changes Work Schedule Calculator

Childcare/Workplace Nursery	Use this category to get answers to any questions you have about Childcare Vouchers or the Workplace Nursery Scheme. Questions that can be asked under this category may include the following: - How to join the Workplace Nursery Scheme? - How to leave the Workplace Nursery Scheme? - How to change Workplace Nursery Scheme contributions? - How to reduce Childcare Voucher contributions? - How to leave the Childcare Voucher Scheme? Employees can also use this category to request to join, leave or change their contributions to the Workplace Nursery Scheme. Please ensure the relevant Workplace Nursery Forms are attached to the request.	*Workplace Nursery Salary Exchange Scheme Application Form* *Workplace Nursery Salary Exchange Scheme Change Request Form* *Workplace Nursery Salary Exchange Scheme* *Withdrawal Form*	Workplace Nursery Scheme
Conditions of Service	Use this category to get answers to any questions about the Conditions of Service summaries which detail the conditions of employment for University Employees. Questions that can be asked under this category may include the following: - Questions about Conditions of Service - Notice Periods - Annual Leave entitlement - Sick Leave and Family Friendly Leave entitlement - Probation Period		Conditions of Service and other Policies

Continuous Improvement	If you have any suggestions on improving HR and Finance end to end business processes including suggestions to improve People and Money, forms, guidance documents etc submit your feedback via this category for review.		
Contract Changes	As Line Manager or School/ Department Administrator, you can request to end a secondment earlier than agreed using this category. Within this request, please ensure the effective end date is included. Please make sure you have spoken to the Employee about ending their secondment before you action the change on People and Money.	*Return from Secondment Form*	Guide to Employee Separation
Contribution Reward	Use this category to get answers to any questions about Contribution Reward policies and processes.		Contribution Reward Policy
Create/Maintain a schedule	Use this category to get answers to any questions about creating work schedules or updating existing work schedules. Questions that can be asked under this category may include the following: - How to add a work schedule that does not currently exist on the People and Money system? - Check if a work schedule exists on People and Money - How to update an employee's work schedule on People and Money?		Work Schedule Calculator

Cycle Scheme	Use this category to get answers to any questions you have about the Cycle Scheme. Questions that can be asked under this category may include the following: - How to join the Cycle Scheme? - Interest Free Bike Loan Eligibility Criteria		Cycle to Work Scheme
Death in Service	The process for terminating an Employee following a death in service should be handled flexibly given the sensitivities of the situation. For guidance on Manager Responsibilities, please see the Death in Service Guidance in the first instance. HR Helpline Team for support.		Death in Service Guidance
Delegated Approvals	This request can be used to reassign job requisition approvals if they get stuck in the system. Please note, any finance related approvals should be directed to Finance.Helpline@ed.ac.uk.		
Dignity and Respect Advisors	Use this category to get answers to any questions about the University's Dignity and Respect Advisor network. Questions that can be asked under this category may include the following: - How to become a Dignity and Respect Advisor? - What are Dignity and Respect Advisors? - How to contact a Dignity and Respect Advisor?		Dignity and Respect Advisors

Disability Adjustment	Use this category to get answers to any questions about the disability support available at the University. Questions that can be asked under this category may include the following: - Guidance on supporting staff who have a disability - Disability related training modules		Guidance on Supporting Disabled Staff
Disability Support	Use this category to get answers to any questions about the disability support available at the University. Questions that can be asked under this category may include the following: - Guidance on supporting staff who have a disability - Disability related training modules		Guidance on Supporting Disabled Staff Staff Disability Advice Service
Disciplinary Policy	Use this category to get answers to any questions about the Disciplinary Policy. The HR Helpline are only able to refer you to relevant sections of The Policy and cannot provide you with advice. If a Line Manager wishes to take any formal action, they should contact an HR Advisor/Partner prior to this.		Disciplinary Policy
EEA/Swiss staff	Use this category to get answers to any questions you have about Right to Work for EEA/Swiss Nationals.		Demonstrating your Right to Work

Emergency Time off for Dependants	Use this category to get answers to any questions you have about Emergency Time off for Dependants. Questions that can be asked under this category may include the following: - Emergency Time off for Dependant's entitlements - Recording Emergency Time off for Dependants in People and Money		Emergency Time Off for Dependants
Employee Seconded Externally	Line Managers or SDA can use this category to provide full details of the external secondment to allow HR Operations to update the Employee record.		Guide to Job Changes Secondments Policy
Employment Costs	Please refer to the Employment Costs webpages in the first instance. If you have any specific questions around this, use this category to contact the HR Helpline Team who will refer your query to a Specialist Team for assistance.		Employment costs
End of Fixed Term Contract	Use this category to get answers to any questions you have regarding the end of an Employees fixed term contract. Questions that can be asked under this category may include the following: - An Employee's fixed term contract is ending, what do I need to do? - Extending a fixed term contract		Guide to Job Changes Ending FTC and Restricted Contracts Fixed Term Contracts - Managing the move to Open-Ended contracts

Equality and Diversity	Use this category to get answers to any questions about Equality and Diversity at the University. Questions that can be asked under this category may include the following: - Current equality and diversity related policies, for staff - Completing Equality Impact Assessments		Equality and Diversity Strategy
Exit Interview	Use this category to get answers to any questions you have regarding exit interviews. Questions that can be asked under this category may include the following: - How to set up an Exit interview?		Guide to Employment Separation
External Examiner	External Examiners can be added to The University Payroll via this category. Please complete the required attachment and provide the Right to Work for the individual. **Please keep in mind that these Interim Forms will only add the External Examiner to the People and Money system; they will not be paid. For information on how to secure payment, please see the 'Timesheet for External Examiners' section.** This should be submitted by the 3rd of the month for processing within the current pay period.	*External Examiner Details (Form 95a)*	Payments to External Examiners

External Examiner Timesheet	This category can be used to submit Timesheets for External Examiners, which will ensure they are paid for work completed. This should be submitted by the 7th of the month for processing within the current pay period.	*External Examiners Timesheet (Form 96b)*	Payments to External Examiners
Financial Assistance	Use this category to get answers to any questions you have about Financial Assistance in relation to obtaining a Visa. Questions that can be asked under this category may include the following: - Information on getting a Visa Loan - Information on getting a Visa Reimbursement		Immigration Fee Assistance
Fixed Term Contracts	Use this category to get answers to any questions you have about Fixed Term Contracts. Questions that can be asked under this category may include the following: - Fixed Term Contract end dates - Processing Fixed Term Contract Extensions		Guide to Job Changes Ending FTC and Restricted Contracts Fixed Term Contracts - Managing the move to Open-Ended contracts Fixed Term Contracts Reason Codes

Flexible Retirement	Use this category to get answers to any questions you have about Flexible Retirement. Questions that can be asked under this category may include the following: - Queries regarding the Flexible Retirement Policy - Making Flexible Retirement Request - Requesting a quote for Flexible Retirement - How to approve and submit a Flexible Retirement Request for a direct report?		Retirement - Flexible Retirement Policy
Flexible Working	Use this category to get answers to any questions you have about Flexible Working. Questions that can be asked under this category may include the following: - Queries regarding Flexible Working Policy - Making a Flexible Working Request - Formalising a Flexible Working Request - How to approve and submit a Flexible Working Request for a direct report?		Flexible Working Policy

Flexible working or Flexible retirement	Work schedules and working hours will be adjusted in line with the Flexible Working Requests/Flexible Retirement Requests attached to this Service Request. This should be submitted three months prior to the new working arrangement. The Employee will subsequently receive a letter confirming the change. This should be submitted by the 7th of the month for processing within the current pay period.	*Flexible Working Request Form* *Retirement - Flexible Retirement Form*	Flexible Working Policy Retirement - Flexible Retirement Policy
GDPR	Questions that can be asked under this category may include the following: - How long do HR retain data? - What information do HR hold and what do they need it for?		
GH timesheet	GH Timesheets should be completed via the Time and Absence App on People and Money. Line Managers/Timekeepers should review, approve/reject Timecards via People and Money.		Guide to Timekeeping How to Generate Time Card How to review, approve or reject a Timecard.
Governance Policies	If you have any specific questions around Governance Policies, use this category to contact the HR Helpline Team who will refer your query to a Specialist Team for assistance.		

Grade 10 Review	Use this category to get answers to any questions about Contribution Reward policies and processes for Grade 10 Employees.		Contribution Reward Policy
Grade Profiles	Details on Grade Profiles can be found in the Grade Profiles Guidance. If you have any specific questions around this, use this category to contact the HR Helpline Team who will refer your query to a Specialist Team for assistance.		Grade Profiles - all staff
Grievance Policy	Use this category to get answers to any questions about the Grievance Policy. The HR Helpline are only able to refer you to relevant sections of The Policy and cannot provide you with advice. Employees should speak with their Line Manager regarding any grievances in the first instance. Line Manager should contact a HR Advisor/Partner regarding any grievances in the first instance.		Grievance Policy

Guaranteed Hours	Use this category to get answers to any questions about Guaranteed Hours processes and policies. Questions that can be asked under this category may include the following: - Questions about the Management of Guaranteed Hours Employees guidance - How to access the GH App on People and Money? - How to pay Guaranteed Hours Employees for completed work? - How to offer hours to a GH Employee via the GH App on People and Money?		Guide to Guaranteed Hours Guide to Timekeeping How to Generate a Time Card How to review, approve or reject a Timecard.
Health & Wellbeing	Use this category to get answers to any questions you have about the University's available Health & Wellbeing resources.		Health and Safety Policy
Hierarchy Changes	To request hierarchy changes within People and Money, use this category.		
Income Tax	Use this category to get answers to any questions you have about Tax payments or Tax Forms. For queries regarding P45s or P60'S, please use the **P45/P60** category.		Tax Matters
Induction	Use this category to get answers to any questions you have regarding managing the Induction process for new starts. New starts can also use this category if they have any questions regarding the completion of onboarding tasks.		How to complete onboarding tasks

Internal transfer to a non-advertised post	To process an Internal Transfer, Secondment or Additional Post to a non-advertised post on People and Money, this category should be used.	*Request for Transfer, Additional Post or Internal Secondment* *Job Requisition Business Case*	Guide to Recruitment and Onboarding
Interviews	Use this category to get answers to any questions you have about attending Interviews or managing interviews. Questions that can be asked under this category may include the following: - How to setup Interviews on People and Money? - Interview expenses eligibility - Are references required before an interview?		Guide to Recruitment and Onboarding
Job Description	Use this category to get answers to any questions you have about job descriptions. Questions that can be asked under this category may include the following: - Where to find job descriptions? - How to change a job description?		Guide to Recruitment and Onboarding

Job Grading	Use this category to get answers to any questions you have about job grading processes and policies. Questions that can be asked under this category may include the following: - How to get a new role graded? - How to regrade an existing role? - How to appeal a job grading decision?		Guidance on Position Management Job Grading Policy
KIT/SPLIT Days	If an Employee agrees to attend any KIT/SLIT days, they will need to decide in advance whether they wish to be paid for the time or accrue TOIL (Time Off in Lieu). If they choose to take TOIL, they must arrange with their manager when this will be taken. Ideally, this will be at the end of their family leave and before they physically return to work. If an Employee would like to be paid for the KIT/SPLIT day, the Line Manager/SDA should submit this form by the 7th of the month by completing the mandatory fields.	*Complete mandatory fields within Service Request*	Guide to Maternity Leave Guide to Adoption & Surrogacy Leave Guide to Shared Parental Leave
Leavers Checklist	Managers, School/Department Admins and Employees can use this category to get answers to any questions regarding completing the Leavers Checklist.		Guide to Employment Separation
Market Supplements	Use this category to get answers to any questions about the Market Supplements Policy.		Market Supplements Policy

Maternity Leave	Use this category to get answers to any questions you have about Maternity Leave. Questions that can be asked under this category may include the following: - Maternity Leave Policy queries - What is required to take Maternity Leave? - Maternity Leave Entitlement - Maternity Pay - Supporting an Employee going on Maternity Leave - What happens to Annual Leave whilst on Maternity? - Returning from Maternity Leave - Changing work pattern or working hours after Maternity Leave		Guide to Maternity Leave Maternity leave toolkit
Mentoring	Use this category to get answers to any questions about Mentoring. Questions that can be asked under this category may include the following: - How to become a Mentor? - How to become a Mentee?		Coaching and Mentoring
National Insurance	Use this category to get answers to any questions you have about National Insurance payments. Questions that can be asked under this category may include the following:		National Insurance contributions

	- How to get a National Insurance Number? - National Insurance contribution queries		
New Casual Worker	To add a new Casual Worker to People and Money, this Form should be submitted with the Ad-Hoc Payment - Agreement for Casual Workers (F100) attached and Right to Work documentation. This should be submitted by the 3rd of the month.	*Ad-Hoc Payment - Agreement for Casual Workers (F100)*	Casual Payroll
New External Application Flow	Hiring Managers can also use this Form to request for HR to add late applications to job requisitions. Use 'Late application' along with the job requisition name and number in the title of your service request and include: - Applicant's name - Title - Source of application, e.g.: LinkedIn, email etc. - Email address and phone number - Their CV, as an attachment	*Candidate CV*	Guide to Recruitment and Onboarding
On-call, Call-out & Out of Hours Working	Use this category to get answers to any questions about the On-call, Call-out & Out of Hours Working policies and processes.		On-Call, Call-Out and Out of Hours Working Policy
Organisational Change	You can find the latest changes to People and Money on the People and Money updates page. If you would like to query any other organisational changes, please use this category and the HR Helpline Team can direct your query to the appropriate contact within the University.		People and Money updates

Overpayments	Use this category to get answers to any questions you have about managing an overpayment. Questions that can be asked under this category may include the following: - How to repay when you have been overpaid? - Paying off overpayments in a lump sum - Increase monthly overpayment deductions		Guide to Payroll for Employees, Line Managers, School Department Administrators and HR Operations.
Parental Leave	Use this category to get answers to any questions you have about Parental Leave. Questions that can be asked under this category may include the following: - Parental Leave Policy queries - How to take Parental Leave? - Supporting an Employee who wants to take Parental Leave - How to record Parental Leave on People and Money?		Parental Leave Policy
Partner Leave	Use this category to get answers to any questions you have about Partner Leave. Questions that can be asked under this category may include the following: - Partner Leave Policy queries - What is required to take Partner Leave? - Partner Leave Entitlement - Partner Leave Pay		Partner Leave Policy (formerly Paternity Policy)

	- How to support an Employee going on Partner Leave? - How to request Partner Leave on People and Money? - How to approve Partner Leave on People and Money - Returning from Partner Leave		
Pay Award Changes	Pay Award changes within People and Money should be submitted using this category. This is in relation to the Incremental Pay Awards and should not be used for Ad-Hoc requests.		
Pay Enquiries – General	Use this category to get answers to general pay enquiries you may have. Questions that can be asked under this category may include the following: - When is pay day? - How much will I be paid? - When is payroll cut-off for submitting Timecards? This category can also be used to let the University know that you have left the Trade Union, Give as You Earn, Credit Union and/or AIG. This will allow your salary sacrifice deductions to cease. Requests that do not meet the current payroll period cut off will be applied the following month.	*(If applicable)*	Payroll Queries Webpage Guide to Payroll for Employees, Line Managers, School Department Administrators and HR Operations.
Pay Enquiries - Incorrect Pay	Please ensure that you review your Payslip on People and Money. If you have a question about your pay and cannot find the answer in My Knowledge or the People and Money User Guides, check with your Line Manager, School Department Admin, or Timekeeper to confirm that any necessary payment approvals were completed before the payroll cut-off dates.		Payroll Queries Webpage Guide to Payroll for Employees, Line Managers, School Department Administrators and HR Operations. Guide to Time Keeping

	If you believe you have been paid incorrectly, please use this category to notify the Payroll Team, who will investigate.		How to view your payslip
Pay Enquiries - No pay	Please ensure that you review your Payslip on People and Money. If you have a question about your pay and cannot find the answer in My Knowledge or the People and Money User Guides, check with your Line Manager, School Department Admin, or Timekeeper to confirm that any necessary payment approvals were completed before the payroll cut-off dates. If you believe you have not been paid, please use this category to notify the Payroll Team, who will investigate.		Payroll Queries Webpage Guide to Payroll for Employees, Line Managers, School Department Administrators and HR Operations. Guide to Time Keeping How to view your payslip
Pay Protection	Use this category to get answers to any questions about Pay Protection processes. Questions that can be asked under this category may include the following: - Will I receive an Increment this year if I have a pay protection arrangement?		
Pay Scales	Use this category to get answers to any questions about University Pay Scales.		Pay Scales Webpage
Payslip	Use this category to ask questions in regards to your payslip. Your payslip is available to view on People and Money. If you have a question about your pay and cannot find the answer in		Guide to Payroll for Employees, Line Managers, School Department Administrators and HR Operations.

	My Knowledge or the People and Money User Guides, check with your Line Manager, School Department Admin, or Timekeeper to confirm that any necessary payment approvals were completed before the payroll cut-off dates.		Guide to Time Keeping How to view your payslip
Probation	Use this category to get answers to any questions about probation and/or managing probation. Questions that can be asked under this category may include the following: - How long is my probation period? - Supporting Employees during probation - When to conduct a Probation Review?		Guidance for Managing Probation
Professional Service Jobs Regrading	Use this category to get answers to any questions about the Regrading of Professional Services Jobs policies and processes.		Regrading of Professional Services Jobs
P45/P60	Use this category to get answers to any questions you have regarding your P45 or P60.		Tax Matters
Recruiting Evaluation Criteria	To request new pre-screening questions or interview feedback templates to be created on a job requisition, use this Form. The current Candidate Selection Process has one stage of interview. If an area wanted to have a two-stage interview processing the system, they can request this via this form.		Guide to Recruitment and Onboarding

Recruitment Policies	Use this category to get answers to any questions you have regarding the ' University's Recruitment Policies. Questions that can be asked under this category may include the following: - Overseas applications - Legislative Recruitment Requirements - Advertising Guidelines - Guidance on giving Interview Feedback		Guide to Recruitment and Onboarding Recruitment Guidance (webpage)
Redeployment Register	Use this category to get answers to any questions you have about the Redeployment Register. Questions that can be asked under this category may include the following: - What is the Redeployment Register and how do I use it for recruitment? - How to join the Redeployment Register?		Guide to Recruitment and Onboarding Redeployees
Reference Request	If you require a reference request to confirm your employee details with a prospective employer or lender, please complete this Form. We can only provide basic details such as Job Title, Contract Type and Employment dates. We will only provide salary information if the request is in relation to a Mortgage or Tenancy Application.		

Referrals	Use this category to get answers to any questions you have about referring a candidate for an advertised post at the University. Questions that can be asked under this category may include the following: - How to refer a candidate for an advertised post at the University?		Guide to Recruitment and Onboarding
Regrading Appeal Request	If you wish to appeal a regarding decision, use this category. The original professional Services Regrading Request Form should be submitted with this request. If the regrading appeal is authorised, the HR Reward Team will forward it to HR Operations, who will amend the Employee's assignment to reflect the change.	*Professional Services - Regrading Form*	Regrading of Professional Services Jobs
Regrading Request	This category is used to request the regrading of an existing job description with The Professional Services Group. A Professional Services Regrading Request Form should be submitted with this request. If the regrading Interim Form is authorised, the HR Advisor will forward it to HR Operations, who will amend the Employee's assignment to reflect the change.	*Professional Services - Regrading Form*	Regrading of Professional Services Jobs

Relocation	Use this category to get answers to any questions you have regarding available Relocation Support at the University. Questions that can be asked under this category may include the following: - What relocation support is available? - Relocation eligibility		Relocation Policy Relocation Support
Reports	If you believe that information on a report you have run from the Line Manager Dashboard is incorrect, please raise a service request using this enquiry category. Please include details of the report, such as the name and date it was run, as well as what information you think is wrong. If you have not received the automated shortlisting matrix for a job requisition you are the Recruiter for, use this category. This category can also be used to ask questions about other reports that are available.		How to view Line Manager Dashboard How to view Absence Reports How to view HR Reports
Request Certificate of Sponsorship (COS)	When it has been identified that the individual requires a new CoS or extension, this should be requested by completing the Appropriate application form. Submit the completed and approved application form via this Form. Once HR Operations have received the CoS Application form, they will request the CoS from the UKVI (UK Visas and Immigration) and provide the information to the individual to apply for their visa.	*Skilled Worker CoS application form* *Skilled Worker CoS Extension Form* *Temporary Worker Sponsored*	Skilled Worker CoS Guidance Notes Temporary Worker Sponsored Researcher CoS Guidance Notes Guide to Sponsorship of Skilled Workers and Temporary Worker Sponsored Researchers

	If you experience any problems submitting the CoS using this category please use 'Sponsorship' instead.	*Researcher Application or Extension*	
Research Misconduct	Information on Research Misconduct can be found on the research integrity webpages. If you have any questions, the HR Helpline Team can direct your query to the appropriate contact within the University.		What is research integrity?
Resignation	Use this category to get answers to any questions you have regarding resigning from the University or managing an Employee's resignation. Questions that can be asked under this category may include the following: - How to terminate an Employee on People and Money - What should I do with a resignation letter? - How to notify your Line Manager of your resignation		Guide to Employment Separation
Retirement	Use this category to get answers to any questions you have regarding Retirement processes and policies. **Please direct any pension queries to pensionsmanager@ed.ac.uk.** Questions that can be asked under this category may include the following: - How to notify your Line Manager of your retirement? - As a manager, what should I do with a retirement notice?		Guide to Employment Separation Pensions Retiring

	- What should I do when I want to retire?		

Reward Timetable	Use this category to get answers to any questions about Reward Timetables at the University. Questions that can be asked under this category may include the following: - When does the Contribution Reward process commence? - When does the Annual Grade UE10 and equivalent salary review commence?		Pay and Reward
Right to Work	Use this category to get answers to any questions you have about Right to Work. Questions that can be asked under this category may include the following: - Conducting Right to Work checks - How to demonstrate Right to Work in the UK - Applying for ATAS Certificate - Information on Skilled Worker Visas - Information on Global Talent Visa - References for Indefinite Leave to Remain Applications		Demonstrating your Right to Work
Role Delegation for Longer Term Absences	The responsibility for approval can be delegated when a line manager is on annual leave or absent. Follow the steps in the user guide to the right.		How to set up a delegation for a planned or unplanned absence

	Line Manager of a direct report with line management duties on long term absence can use this category to request role delegation for longer term absences. Please note, any delegations will apply to all approval responsibilities, including financial approvals.		
Sabbatical	Use this category to get answers to any questions you have about Sabbaticals. Questions that can be asked under this category may include the following: - Sabbatical criteria - Sabbatical application and approval process - Recording Sabbatical in People and Money		
Salary Costing Change	Use this category to change an Employee's salary costing details. A Form 13 should be submitted with this request. Make sure you have offline approval before submitting this service request. This Service Request should be submitted by the 16th of the month for processing within the current pay period.	*Charging of Staff Salary Changes (Form 13)*	Guide to Job Changes
SAR	Questions that can be asked under this category may include the following: - Guidance on how to make a subject access request		

Scholarship/Studentship	This category can be used to add people to the University Payroll who need to receive a Taxable Scholarship. This category can also be used to submit any changes to a Taxable Scholarship. Please read the 'Setting up a Taxable Scholarship Payment' guidance to see if the payment should be taxable and therefore requested through this route. This Service Request should be submitted by the 3rd of the month for processing within the current pay period.	*Taxable Scholarships/Studentships Payment (Form 98a)* *Taxable Scholarship notification of change form*	Taxable Scholarships
Secondments	Use this category to get answers to any questions you have about Secondments. Questions that can be asked under this category may include the following: - Secondment Policy queries - Processing an Internal Secondment on People and Money - Processing an External Secondment		Guide to Job Changes Secondments Policy
Selection Process	Use this category to get answers to any questions you have regarding carrying out the selection process. Questions that can be asked under this category may include the following: - How to view applications on People and Money - How to add a two-stage interview process to People and Money		Guide to Recruitment and Onboarding Recruitment Guidance (webpage)

	- How to extend an offer to a successful candidate - How to add interview documents to a candidate's application		
Severe Weather	Use this category to get answers to any questions you have about Severe Weather Questions that can be asked under this category may include the following: - Severe Weather Policy Queries - Actions required when unable to get to work due to Severe Weather - Pay and Annual Leave when the University is closed		Severe Weather Policy
Shared Parental Leave	Requests for Shared Parental Leave should be sent via this Service Request, along with a Curtailment/Notice of Entitlement form. Curtailment cancelation can also be submitted via this Service Request On receipt of the Service Request, HR Operations will complete the necessary checks, add Shared Parental Leave to P&M, and inform you of the next steps. Correspondence will be sent directly to the inbox of the Employee (offline). Please review the Flowcharts on the Shared Parental Leave for guidance on which form should be submitted with this category. You can also use this category to get answers to any questions you have about Shared Parental Leave.	*For information on which paperwork should be submitted with your Interim Form, please check the Flowcharts on the Shared Parental Leave web page.*	Shared Parental Leave Shared Parental Leave Policy Guide to Shared Parental Leave

	Questions that can be asked under this category may include the following: - Shared Parental Leave Policy queries - What is required to take Shared Parental Leave - Shared Parental Leave Entitlement - Shared Parental Leave Pay - Supporting an Employee going on Shared Parental Leave - Recording Shared Parental Leave on People and Money - Returning from Shared Parental Leave - Cancelling Shared Parental Leave - Continuous and Discontinuous Shared Parental Leave - Approving Shared Parental Leave on People and Money - Queries on the information required from Partner who the leave is being shared with.		
Skills and Qualifications	Employees can access the latest University Courses and Learning offerings via the Learning, Skills and Qualification Apps on People and Money. If you have any specific questions around this, use this category to contact the HR Helpline Team who will refer your query to a Specialist Team for assistance.		Guide to Learning, Skills and Qualifications for Employees and Learners Guide to Learning, Skills and Qualifications for Managers

Special Leave	Use this category to get answers to any questions you have about Special Leave. Questions that can be asked under this category may include the following: - Special Leave Policy queries - Types of Special Leave available - Special Leave entitlements - Requesting Special Leave in People and Money		Special Leave Policy How to request special paid leave
Sponsorship	Use this category to get answers to any questions you have about Sponsorship. Questions that can be asked under this category may include the following: - Employing International Workers - Information on requesting Certificate of Sponsorship - Information on contract changes for Sponsored Workers		University sponsorship
Staff Benefits	Use this category to get answers to any questions about the staff benefits available at the University. This enquiry category should also be used to submit any Managed Quarantine Loans for processing.	*Managed Quarantine Loan Request Form*	Staff Benefits

TAP form	Use this category to submit the Temporary Additional Payments (TAP) Form for processing. To guarantee payment, forms must be submitted using this category by the **7th of the month.** The TAP form should only be used in exceptional circumstances. Further information is provided within the Form and within Payroll Guidance.	*Monthly Paid University Employees: Temporary Additional Payments form*	Guide to Payroll for Employees, Line Managers, SDAs and HR Operations
Termination with Settlement Agreement	To terminate an Employee's employment via Settlement Agreement, HR Advisors should submit this Service Request. Please provide the Employees name, Employee number and last date of employment. Please do not include any correspondence/agreements within the Form.		Guide to Employment Separation
Timecard creation/submission	This category should be used by Line Managers, School Department Administrators or Time Keepers in selected areas to submit Bulk Timecards to Payroll. If an Employee has an issue with their Timecard, they should speak with their Line Manager or Time Keeper in the first instance. Process user guides, Knowledge Articles and System User Guides provide you with the detail required on submitting and approving Timecards.		Guide to Time Keeping

TOIL	Use this category to get answers to any questions you have about Time off in Lieu. Questions that can be asked under this category may include the following: - When TOIL can be used - Recording TOIL in People and Money		
Training	Employees can access the latest University Courses and Learning offerings via the Learning, Skills and Qualification Apps on People and Money. If you have any specific questions around this, use this category to contact the HR Helpline Team who will refer your query to a Specialist Team for assistance.		Guide to Learning, Skills and Qualifications for Employees and Learners Guide to Learning, Skills and Qualifications for Managers
Training Resources	Employees can access the latest University Courses and Learning offerings via the Learning, Skills and Qualification Apps on People and Money. If you have any specific questions around this, use this category to contact the HR Helpline Team who will refer your query to a Specialist Team for assistance.		Guide to Learning, Skills and Qualifications for Employees and Learners Guide to Learning, Skills and Qualifications for Managers

TUPE Out	Use this category to get answers to any questions you have regarding an Employee transferring out of the University to another employer under a Transfer of Undertakings. Questions that can be asked under this category may include the following: - Line Manager responsibilities in relation to TUPE out Transfer processes - What happens to an Employee's remaining annual leave as a result of TUPE out?		Guide to Employment Separation
TUPE Out a group of Employees	For TUPE requests for more than 10 Employees, HR Advisors should submit this Service Request to request that the Employees are terminated on People and Money Via TUPE Out. Please attach the ELI spreadsheet to your request.		Guide to Employment Separation
TUPE Out an Employee	For TUPE request, HR Advisors should submit this Service Request to request that the Employees are terminated on People and Money Via TUPE Out. Please attach the ELI spreadsheet to your request.		Guide to Employment Separation

Unauthorised Leave	Use this category to get answers to any questions you have about Unauthorised Leave. Questions that can be asked under this category may include the following: - Absence Management Policy queries - Recording Unauthorised Leave in People and Money - When does Unauthorised Leave apply?		Absence Management Policy
Update protected characteristics	Use this category if you want to as a question about updating your protected characteristics		Staff Equality Data Collection & Monitoring
Update PURE or Work tribe Flags	To request for a PURE or Work tribe flag to be added to an Employee's People and Money assignment, submit a Service Request using this category.		Work tribe
Updating Your Record	In most cases, Employees can update their personal record on People and Money. For guidance on how to do this, please see the Personal Data Maintenance section of the People and Money user guides web page. If you have issues updating your record, use this category to contact the HR Systems Team for assistance. Please include details on what updates are required and effective dates of changes.		Personal Data Maintenance

User Access	This category can be used to send the People and Money Access Request Form for processing. Please make sure you attach a completed and authorised form with your request. This category can also be used to request that Job Description Hyperlinks are updated prior to advertising. Please ensure that you provide up to date Hyperlinks and the Job Requisition number. If a Grade 6 or below Employee who is not a Line Manager needs to be part of a recruitment panel, use this category to request to 'Add the Collaborator' role to their profile.	*People and Money Access Form*	
Visa Fee Reimbursement	Line Managers and SDA's can submit completed and approved Immigration Fee Reimbursement form via this route. The approved form must be attached to this Service Request. Once HR approve the request, payment will be made to the Employee in the next available Payroll.	*Immigration Fee Reimbursement Request Form*	Immigration Fee Reimbursement Guidance
Visa Loan	Employee's can submit completed and approved Immigration Fee Loan Request forms via this route. Ensure the approved form is attached to the Service Request. Once HR approve the request, payment will be made to the Employee in the next available Payroll or by Accounts Payable (should they not yet have a payroll record set up).	*Immigration Fee Loan request Form*	Immigration Fee Loan Guidance Notes

Visa Support	Use this category to get answers to any questions you have about Visa Support. Questions that can be asked under this category may include the following: - Supporting Employees in applying for visa extensions - Information on changing Visa routes		Information for International Staff
Visitors	Any access requests for Visitors should be directed to IS Helpline. If you have any other queries in regard to Visitors, please Use this category and the HR Helpline Team will direct your query accordingly.		Visiting the UK Contact the IS Helpline
Voluntary Severance	Use this category to get answers to any questions you have regarding the Voluntary Severance (VS) scheme. Questions that can be asked under this category may include the following: - How does Voluntary Severance work? - How do I process a termination on People and Money for someone who is leaving via the VS Scheme?		Voluntary Severance FAQs
Voucher Reward	Use this category to get answers to any questions about Voucher Reward policies and processes.		Pay and Reward

Work schedule change (no hours change)	If there are no changes to the Employee's hours, Line Managers and SDAs can request that the work schedule is updated within this request. Please remember to include the effective date of the work schedule change. If the new work schedule changes the Employee's weekly hours, Line Managers/SDAs should update the hours and the work schedule on People and Money via the Change Assignment App.	*Work Schedule Calculator*	Guide to Work Schedules Guide to Job Changes