



People and Money

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Employee Guide- How to Edit your Personal Details in the System Employee

Before You Start

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).

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. 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.

In Brief...


Navigating to Personal Details

1. From the Home page, open the **Me** section, then click **Personal Information**
2. Select **Personal Details**
3. To open and close the different sections use the arrow  on the right

Editing your Name


- a. In the Name section, click the **pencil icon**  to edit details such as your **Title**, **First Name**, **Middle Name**, **Preferred 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. If no preferred name is specified, your first name will appear blank on the staff directory. Please avoid using special characters wherever possible.

- b. Enter the **date** on which this name change starts in the provided field.
- c. Click **Submit** 

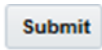
For detailed guidance, see the [Editing Your Name Section](#).

Editing your Demographic Info

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


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 **Submit**

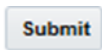


For detailed guidance, see the [Editing Your Demographic Info section](#)

Editing your Biographical Info


- a. In the Biographical Info section, click the **pencil icon**  to edit your Disability and Biographical Info

- b. Click **Submit**



For detailed guidance, see the [Editing Your Biographical Info section](#).

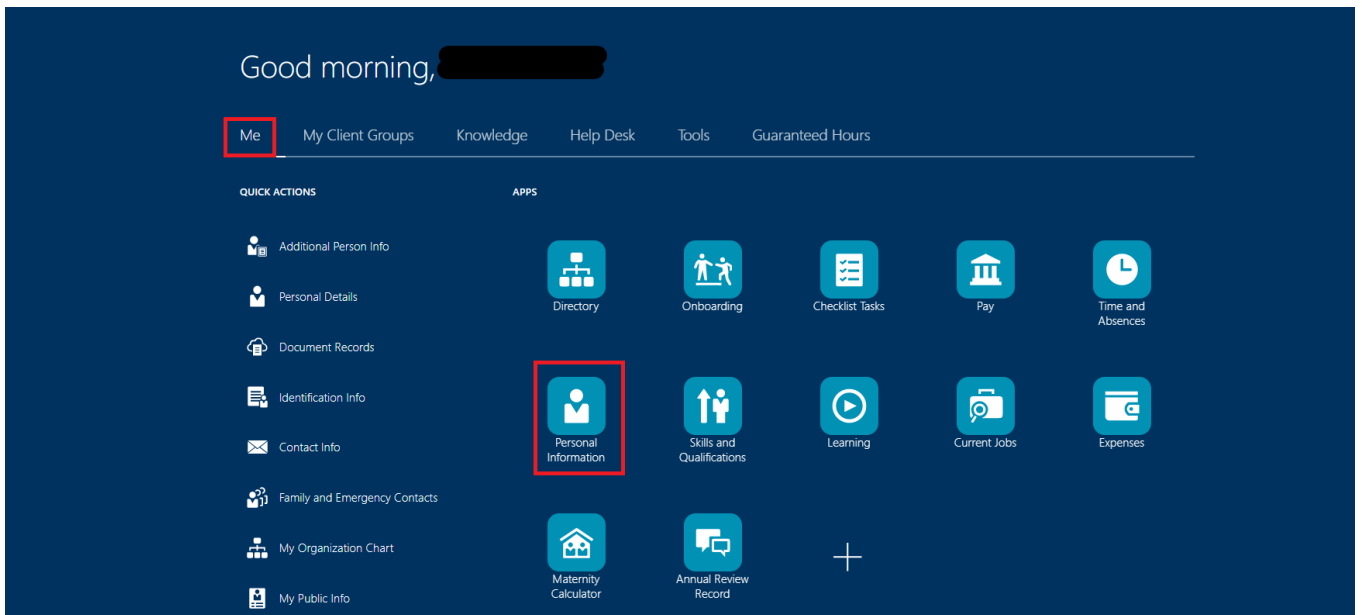
Updating your protected characteristics

1. From the Home page, open the **Me** section, then click **Personal Information**
2. Select **Additional Person Info**
 - a. Use the dropdown menu and select **Protected Characteristics**
 - b. Click **Add** or the **pencil icon**  to edit your information.
 - c. Click **Save**.

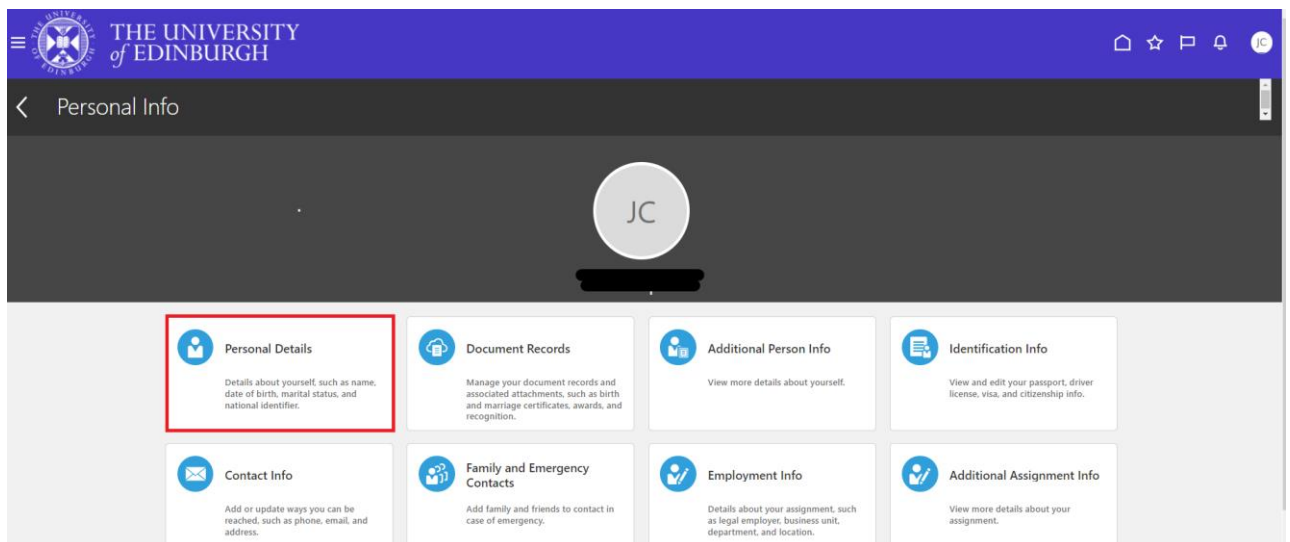
For detailed guidance, see the [Updating Your Protected Characteristics section](#).

In Detail...

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

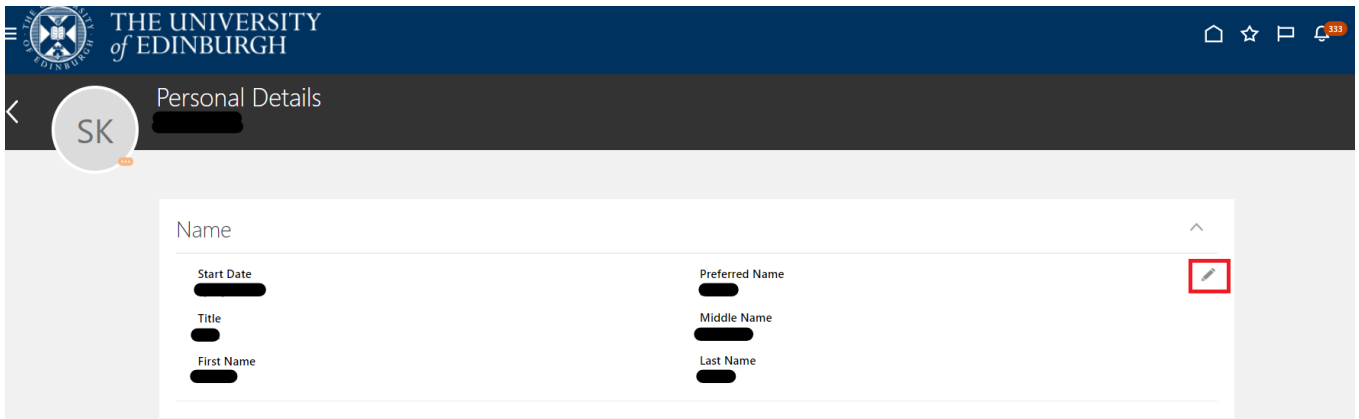


2. Select Personal Details

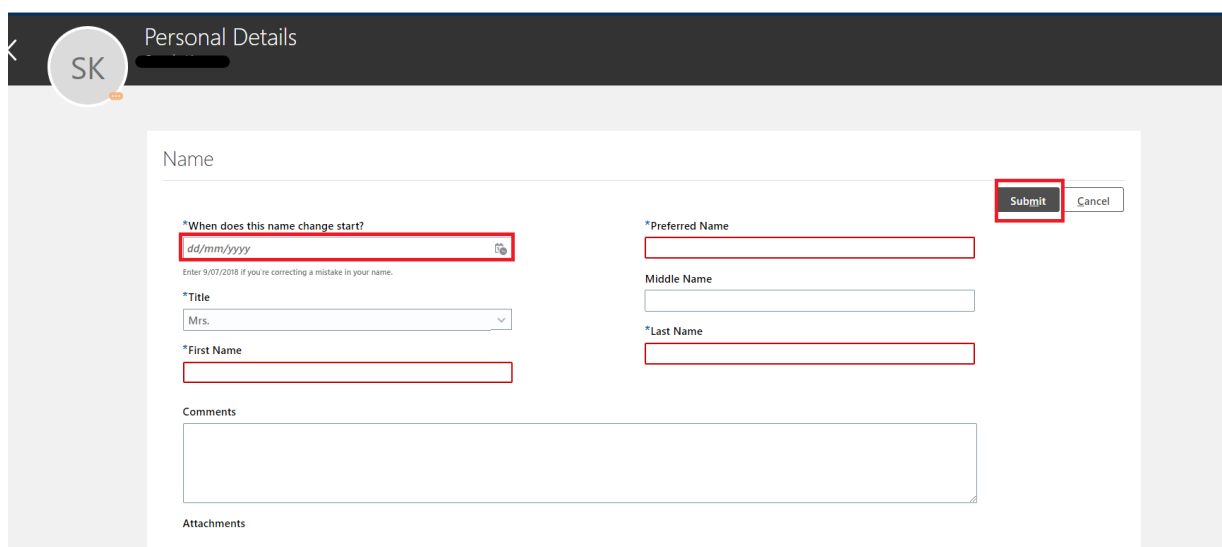


Editing your Name

- 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**
 - **Middle Name**
 - **Last Name**
 - **Preferred 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. If no preferred name is specified, your first name will appear blank on the staff directory. Please avoid using special characters wherever possible.

- c. Once complete **click Submit**

Editing your Demographic Info

- a. In the Demographic Info section, click the **pencil icon**

Personal Details
Emerson Green

Name

Start Date 22/09/2014	Title Mrs.
Last Name Green	First Name Emerson
	Middle Name Jane

Demographic Info

Country United Kingdom	Marital/Civil Partnership Status Married/Civil partner
Religion	Start Date 22/09/2014
Ethnicity Mixed - White and Black African	Gender Female

National Identifiers

Biographical Info

- b. Edit the following information:
- Marital/Civil Partnership Status
 - Ethnicity
 - Gender

Personal Details
Ankita Narayan

Preferred Name
Ankita

Demographic Info

Submit Cancel

Country United Kingdom	Marital/Civil Partnership Status Married/Civil partner
Ethnicity Indian	Gender Female

Comments

Attachments

Drag files here or click to add attachment

Note: 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 Protected Characteristics](#) below.

c. Click **Submit**

The screenshot shows a mobile application interface for 'Personal Details' for Emerson Green. The 'Demographic Info' section contains several dropdown menus: 'Country' (United Kingdom), 'Religion' (Select a value), 'Ethnicity' (Mixed - White and Black African), 'Marital/Civil Partnership Status' (Married/Civil partner), and 'Gender' (Female). A 'Comments' text area and an 'Attachments' section with a drag-and-drop icon are also visible. The 'Submit' button is highlighted with a red box.

Editing your Biographical Info

- In the Biographical Info section, click the **pencil icon**. Please note - **Date of Birth** is not an editable field

The screenshot shows the 'Biographical Info' section of the form. The header 'Biographical Info' is highlighted with a red box. A pencil icon in the top right corner is also highlighted with a red box. The section contains several fields: 'Date of Birth', 'Age', 'Student Number', 'HESA Disability 1', 'HESA Disability 2', 'HESA Disability 3', 'HESA Disability 4', 'British Sign Language User', 'HESA previous institution', 'HESA Highest Qualification', 'HESA previous employment', 'Last Updated Date', and 'Last Updated By'.

- Enter your disability information in the **HESA Disability 1, 2, 3 and 4** fields where relevant, selecting the appropriate value from the drop down. You can record up to four disabilities and whether you are a **British Sign Language User**.
- Once complete press **Submit**.

Biographical Info

Date of Birth

Student Number

HESA Disability 1

HESA Disability 2

HESA Disability 3

Comments

Attachments

HESA Disability 4

British Sign Language User

HESA previous institution

HESA Highest Qualification

HESA previous employment

Submit Cancel

Drag files here or click to add attachment

Updating your protected characteristics

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

THE UNIVERSITY of EDINBURGH

Personal Info

JC

Personal Details
Details about yourself, such as name, date of birth, marital status, and national identifier.

Document Records
Manage your document records and associated attachments, such as birth and marriage certificates, awards, and recognition.

Additional Person Info
View more details about yourself.

Identification Info
View and edit your passport, driver license, visa, and citizenship info.

Contact Info
Add or update ways you can be reached, such as phone, email, and address.

Family and Emergency Contacts
Add family and friends to contact in case of emergency.

Employment Info
Details about your assignment, such as legal employer, business unit, department, and location.

Additional Assignment Info
View more details about your assignment.

3. Under **Info Group** use the dropdown menu and select **Protected Characteristics**

Additional Person Info

Info Group Protected Characteristics

HESA (Person)

Protected Characteristics

+ Add

There's nothing here so far.

4. Click **Add** if there is no information recorded so far or to edit any information click the **pencil icon** and update the following information:

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

Info Group Protected Characteristics

Protected Characteristics


Start Date 25/06/2024

Religion or Belief

Sexual Orientation

Do you consider yourself to be trans, or have a trans history?

Gender Identity



5. Then click **Save**

Info Group Protected Characteristics

Protected Characteristics

*Start Date 25/06/2024

Religion or Belief

Sexual Orientation

Do you consider yourself to be trans, or have a trans history?

Gender Identity

Save Cancel