



System User Guide

How to Edit Your Personal Details in the System

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Introduction

This guide covers key tasks for Employees in the '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.

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**.

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

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**.

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 add or edit your **Disability** and **Biographical Info**.
- b. Click **Save**.

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

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**.

For detailed guidance, see the [Updating Your Additional Person Info section](#).

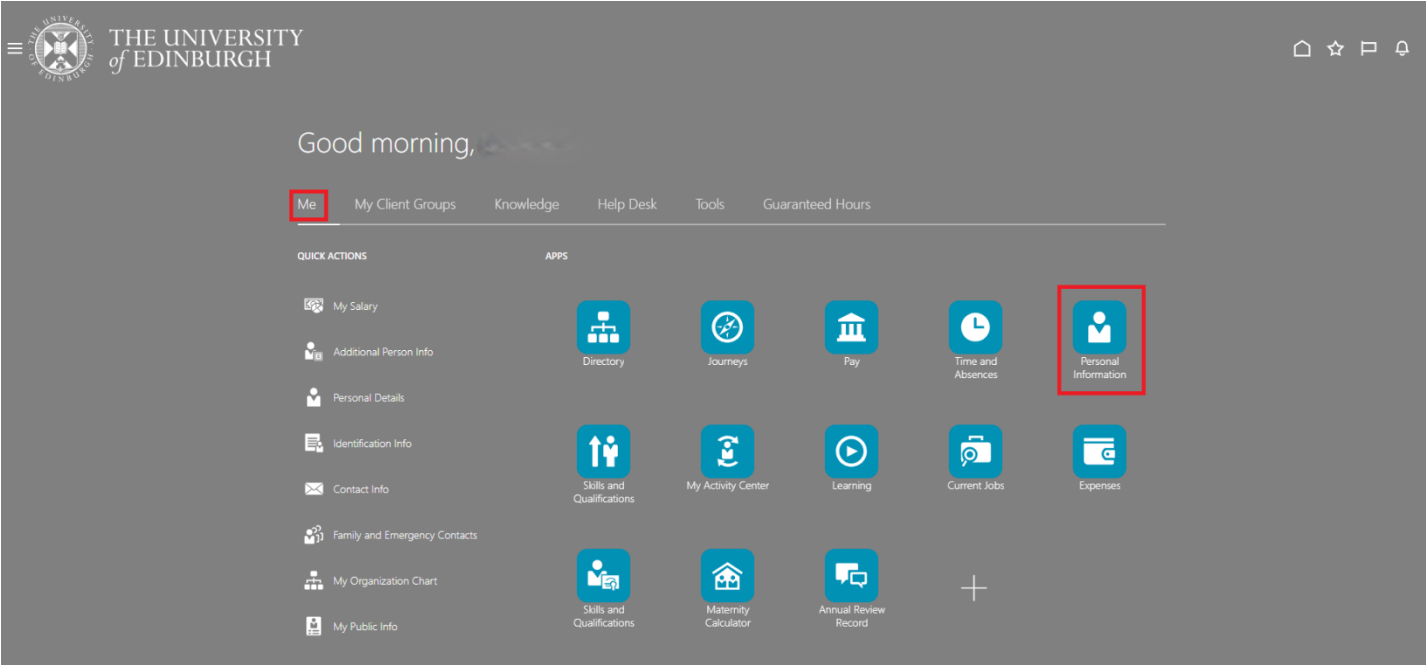
Viewing and updating your Identification Info

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**.

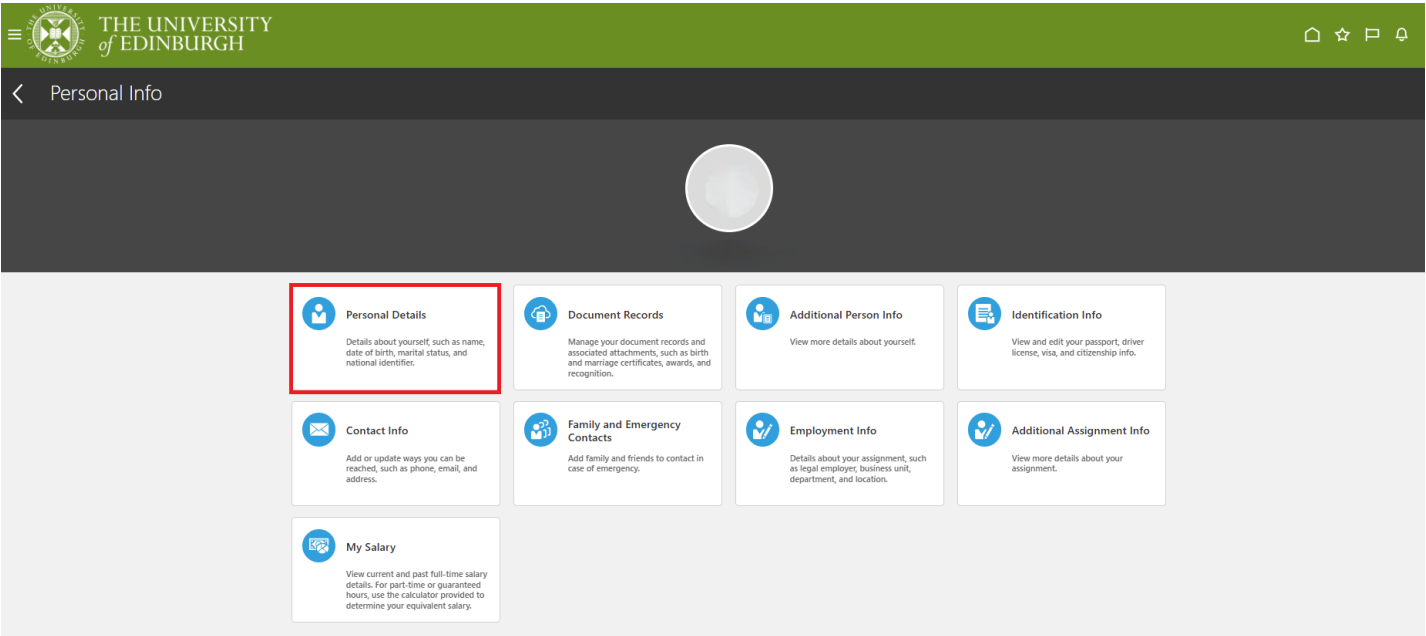
In Detail

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

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

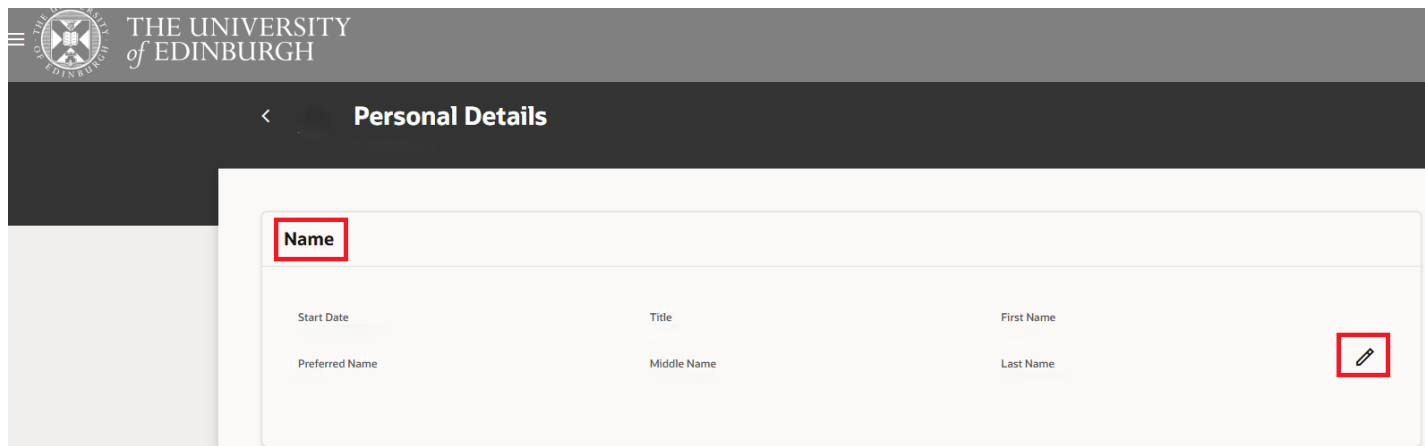


- 2. Select **Personal Details**.



Editing your Name

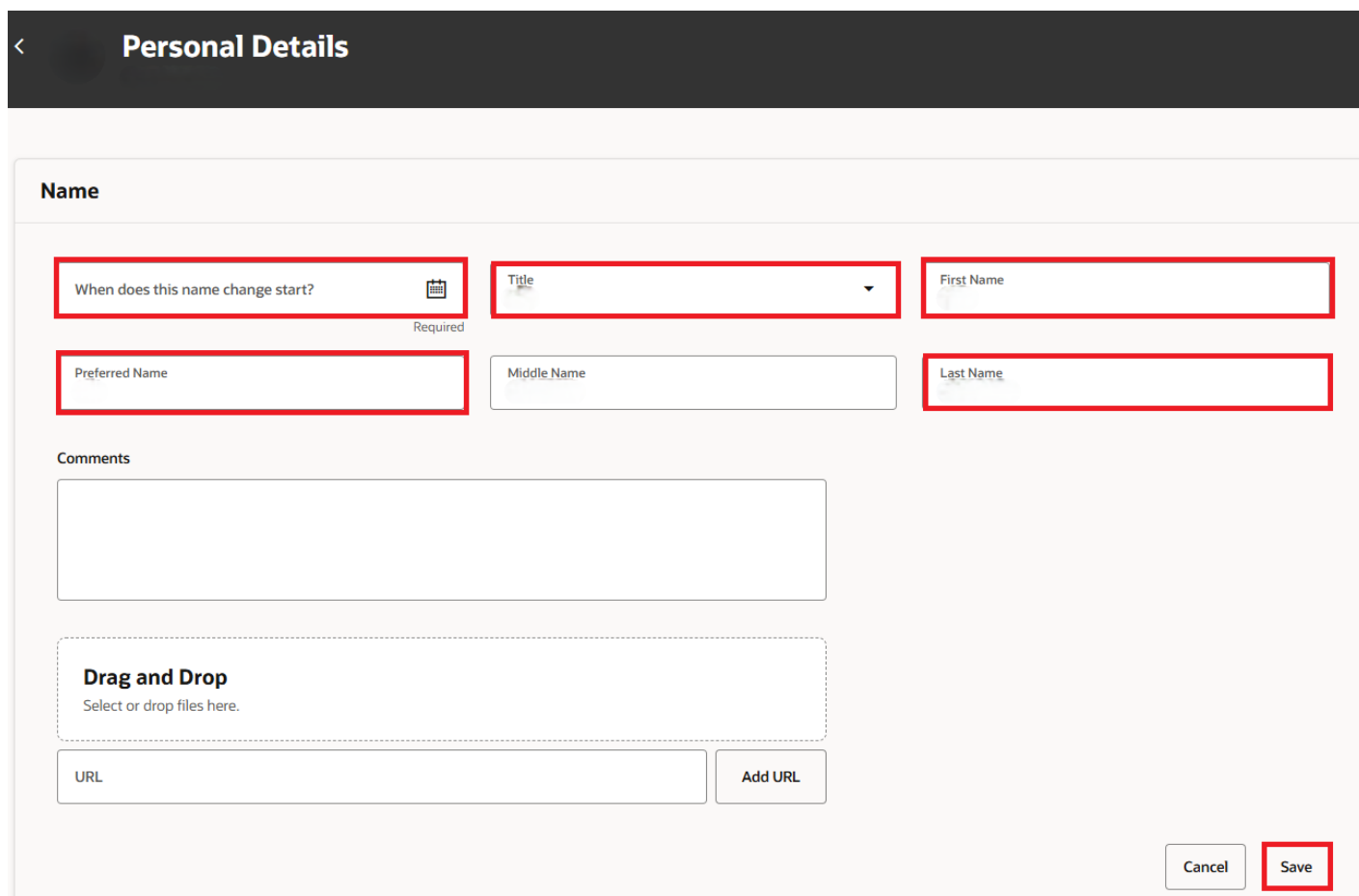
- a. In the **Name** section, click the **pencil icon**.



The screenshot shows the 'Personal Details' page of the University of Edinburgh. The 'Name' section is highlighted with a red box. Within this section, a pencil icon in the bottom right corner is also highlighted with a red box. The form fields visible are Start Date, Title, First Name, Preferred Name, Middle Name, and Last Name.

- b. Enter the **date** on which this name change starts and edit the appropriate fields:

- **Title**
- **First Name**
- **Preferred Name**
- **Middle Name**
- **Last Name**



The screenshot shows the 'Personal Details' page with the 'Name' section expanded. All input fields are highlighted with red boxes: 'When does this name change start?' (with a calendar icon and 'Required' label), 'Title' (dropdown menu), 'First Name', 'Preferred Name', 'Middle Name', and 'Last Name'. Below these fields is a 'Comments' text area, a 'Drag and Drop' file upload section, and a 'URL' input field with an 'Add URL' button. At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box.

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.](#)

c. Once complete click **Save**.

Adding your Photo

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

<

Personal Details

Name

Start Date

Title

First Name

Preferred Name

Middle Name

Last Name

Photo

Add a photo to be displayed next to your name.

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.

<

Personal Details

Name

Start Date


Title

First Name

Preferred Name

Middle Name

Last Name



Photo

Drag and Drop

Select a file or drop one here

Cancel

Save

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

Adding or Editing your Demographic Info

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

The screenshot shows a web interface titled 'Personal Details'. It has a dark header bar with a back arrow and the title. Below the header is a 'Photo' section with a large placeholder box and the text 'Add a photo to be displayed next to your name.' Below that is the 'Demographic info' section. It contains several fields: 'Country for Demographic Reporting' (United Kingdom), 'Marital/Civil Partnership Status', 'Start Date', 'Gender', 'Last Updated Date', 'Last Updated By' (FUSION_APPS_HCM_ESS_LOADER_APPID), and 'Ethnicity' (with a dropdown arrow). A red box highlights a pencil icon in the top right corner of the 'Demographic info' section, indicating where to click to edit the information.

- 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**'.

Demographic info

Country for Demographic Reporting
United Kingdom

Marital/Civil Partnership Status

Gender

Ethnicity

Comments

Drag and Drop

Select or drop files here.

URL

Add URL

Cancel

Save

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

Demographic info

Country for Demographic Reporting
United Kingdom

Gender
Female

Ethnicity
White - English, Welsh, Northern Irish or Brit

Comments

Drag and Drop

Select or drop files here.

URL

Add URL

Marital/Civil Partnership Status

Living together
Married/Civil partner
Prefer not to say
Separated/Divorced
Single
Widowed

When does this marital status change start?

Required

Cancel

Save

c. Click **Save**.

Demographic info

Country for Demographic Reporting
United Kingdom

Marital/Civil Partnership Status

Gender

Ethnicity

Comments

Drag and Drop

Select or drop files here.

URL

Add URL

Cancel

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.

Biographical info

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

Last Updated By

- 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

Biographical info

Date of Birth

HESA Disability 2

British Sign Language User

HESA previous employment

Student Number

HESA Disability 3

HESA previous institution

HESA Disability 1

HESA Disability 4

HESA Highest Qualification

Comments

Drag and Drop

Select or drop files here.

URL

Add URL

Cancel

Save

Education Statistics Agency (HESA).

c. Once complete click **Save**.

Biographical info

Date of Birth	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		

Comments

Drag and Drop
Select or drop files here.

Updating your Additional Person Info

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

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< Personal Info

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.

My Salary
 View current and past full-time salary details. For part-time or guaranteed hours, use the calculator provided to determine your equivalent salary.

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

<
Additional Person Info

Info Group
HESA (Person)

HESA (Person)

+

Add various details that are to be used for reporting and tracking purposes.

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.

<
Additional Person Info

Info Group
HESA (Person)

HESA (Person)

Effective Start Date
16/06/2025

HESA Academic Teaching Qualification 1

HESA Academic Teaching 2

HESA Academic Teaching 3

HESA Academic Teaching 4

HESA Academic Teaching 5

HESA Academic Teaching 6

Required

Cancel
Save

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

7. Under **Info Group**, select **Protected Characteristics** from the drop-down menu.

<
Additional Person Info

Info Group
Protected Characteristics

HESA (Person)

Protected Characteristics

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**”.

<
Additional Person Info

Info Group
Protected Characteristics

Protected Characteristics


Effective Start Date

Religion or Belief

Sexual Orientation

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

Gender Identity



9. Then click **Save**.

Info Group
Protected Characteristics

Protected Characteristics

Effective Start Date

Religion or Belief

Sexual Orientation

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

Gender Identity

Cancel
Delete
Save

Tips:

- Non-UK/Irish Staff

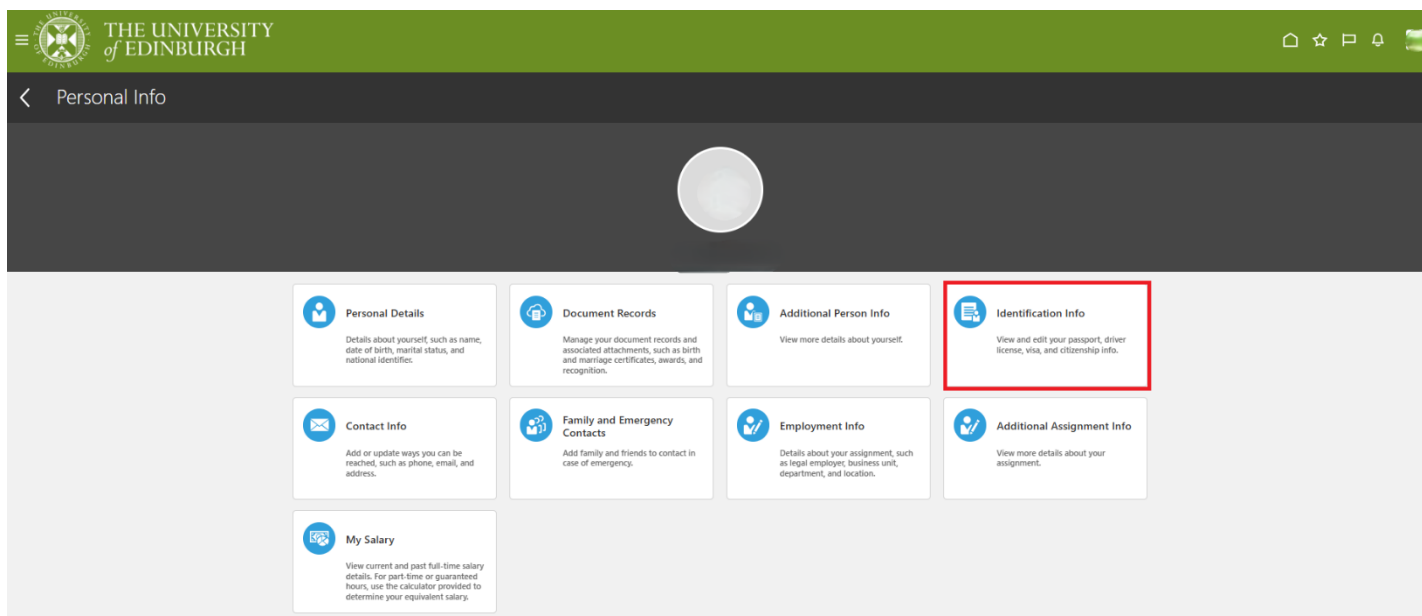
If you are making any changes to your name and gender details in the People & Money system, you are responsible for reporting a change of circumstances and updating visa/BRP documentation as required by UK Visas and Immigration (UKVI). A failure to update official documentation means you may be liable 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.

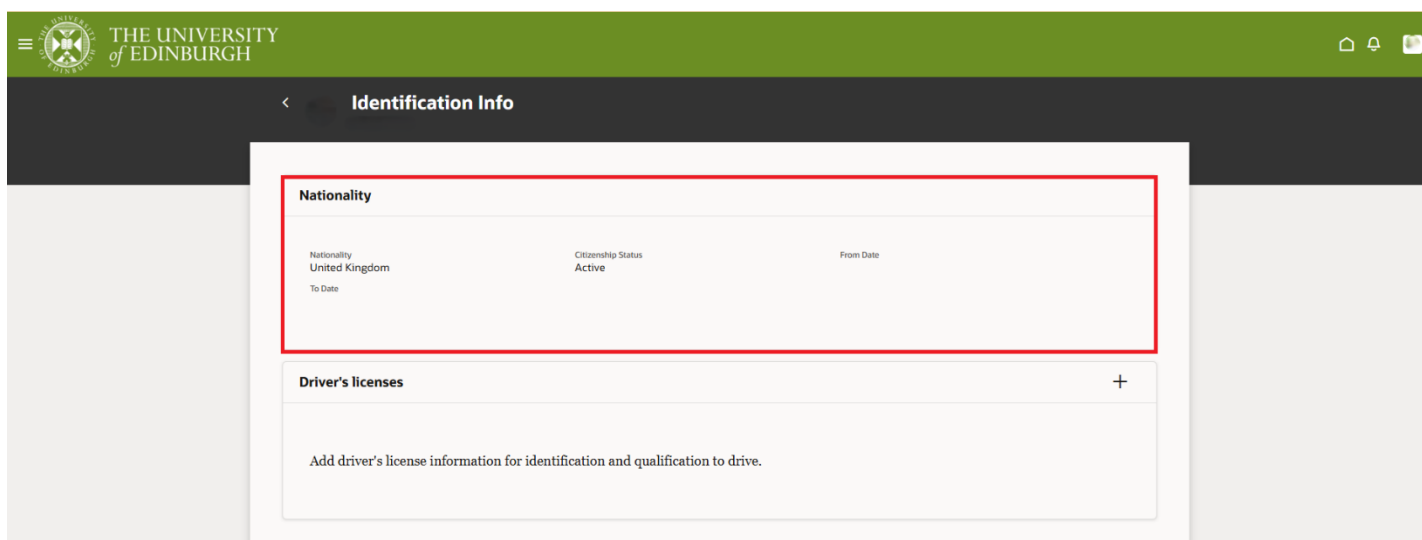
Viewing and updating your Identification Info

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

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< AA Identification Info
Anne Apple

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).



Identification Info

Nationality
United Kingdom
To Date

Citizenship Status
Active

From Date

Driver's licenses



Issuing Country
United Kingdom

License Type

License Number

Issuing Authority

From Date



Place of Issue

Comments

Drag and Drop

Select or drop files here.

URL

Add URL

Cancel

Save

b. Click **Save**.



Identification Info

Nationality
United Kingdom
To Date

Citizenship Status
Active

From Date

Driver's licenses



Issuing Country
United Kingdom

License Type

License Number

Issuing Authority

From Date



Place of Issue

Comments

Drag and Drop

Select or drop files here.

URL

Add URL

Cancel

Save

Version History

Version	Date	Description	Approved By
1.0	04 August 2025	<ul style="list-style-type: none">• 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

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.