



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

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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](#).

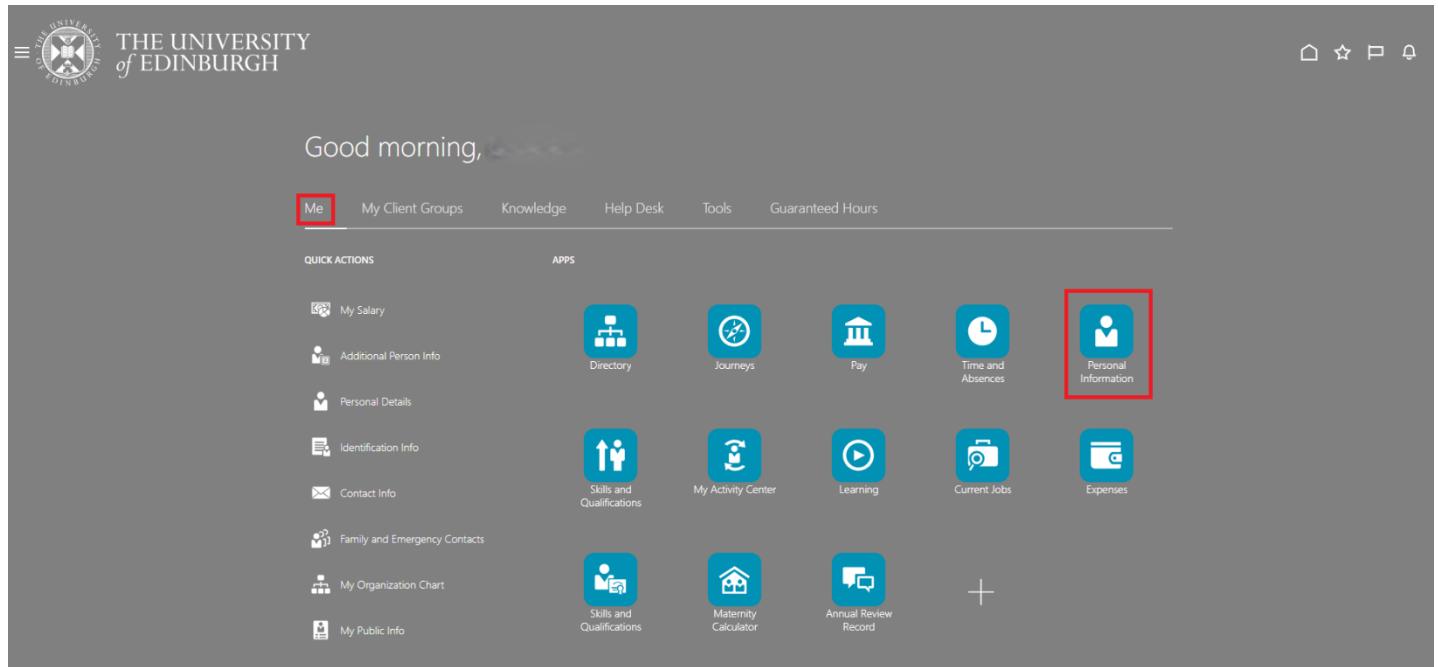
Viewing and updating your Identification Info

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

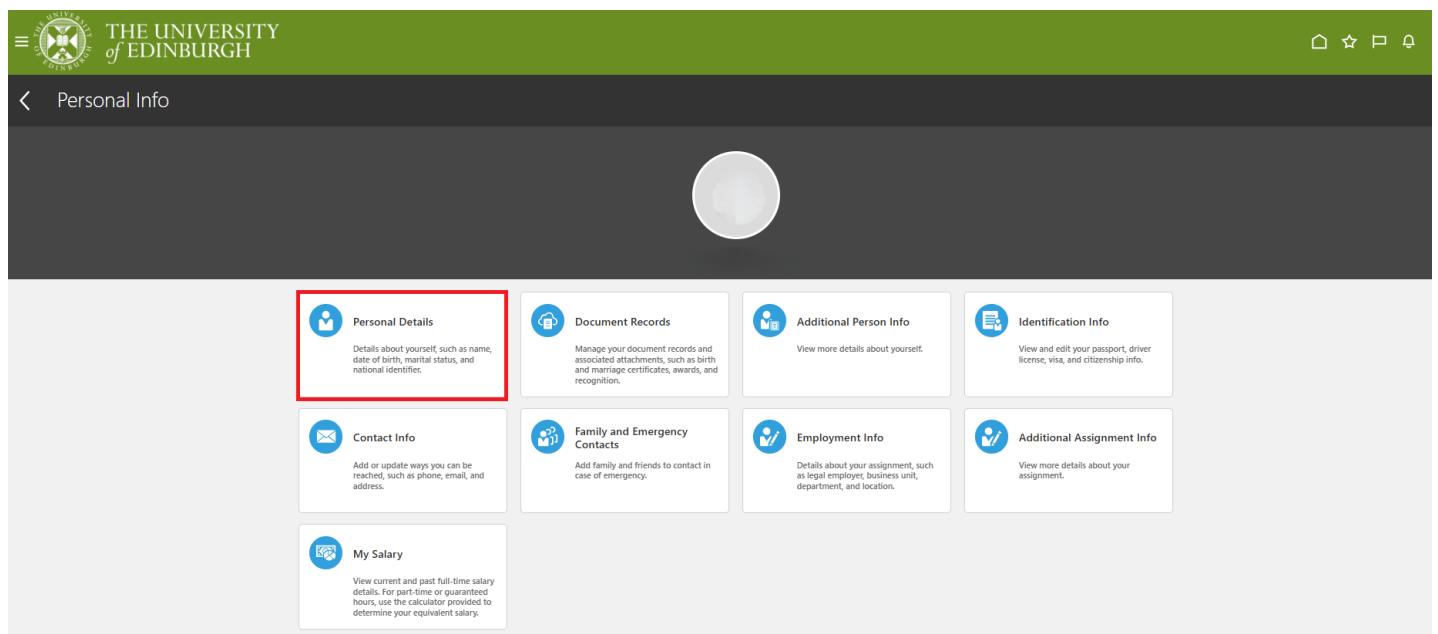
This section provides the detailed steps and includes relevant screenshots from the system.

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



The screenshot shows the University of Edinburgh's home page. At the top, there is a navigation bar with links for 'Me', 'My Client Groups', 'Knowledge', 'Help Desk', 'Tools', and 'Guaranteed Hours'. The 'Me' link is highlighted with a red box. Below the navigation bar is a section titled 'QUICK ACTIONS' containing various icons and links. One of these links, 'Personal Information', is also highlighted with a red box. The page has a dark background with light-colored text and icons.

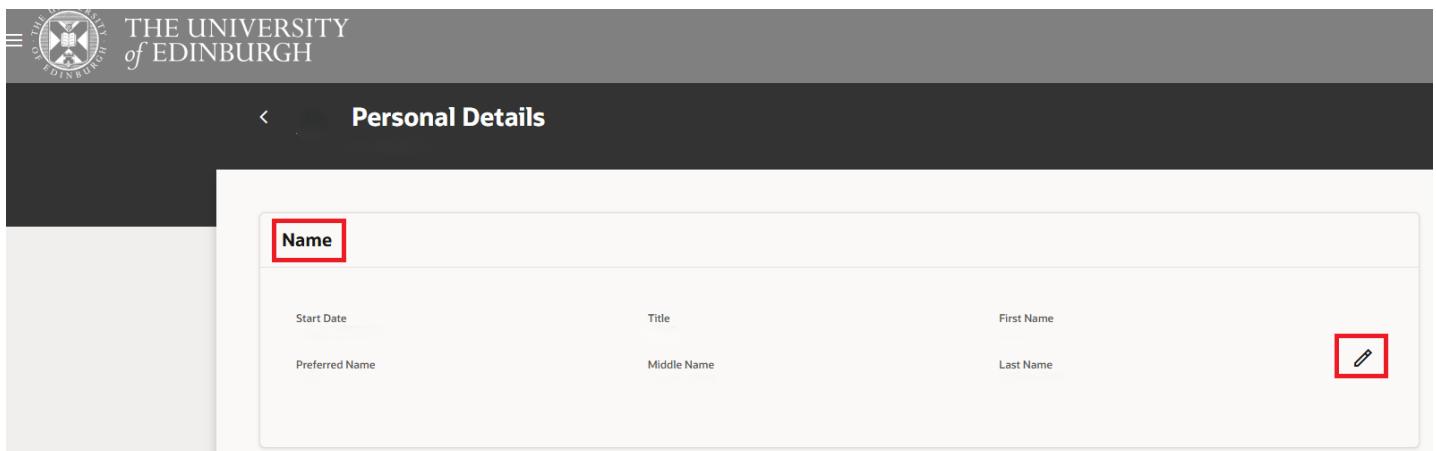
2. Select **Personal Details**.



The screenshot shows the 'Personal Info' page. At the top, there is a navigation bar with the 'Personal Info' link highlighted with a red box. Below the navigation bar is a large, empty circular area. The main content area contains several cards, each with an icon and a title. One card, 'Personal Details', is highlighted with a red box. The other cards are: 'Document Records', 'Additional Person Info', 'Identification Info', 'Contact Info', 'Family and Emergency Contacts', 'Employment Info', and 'Additional Assignment Info'. Each card has a brief description below its title.

Editing your Name

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



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Personal Details

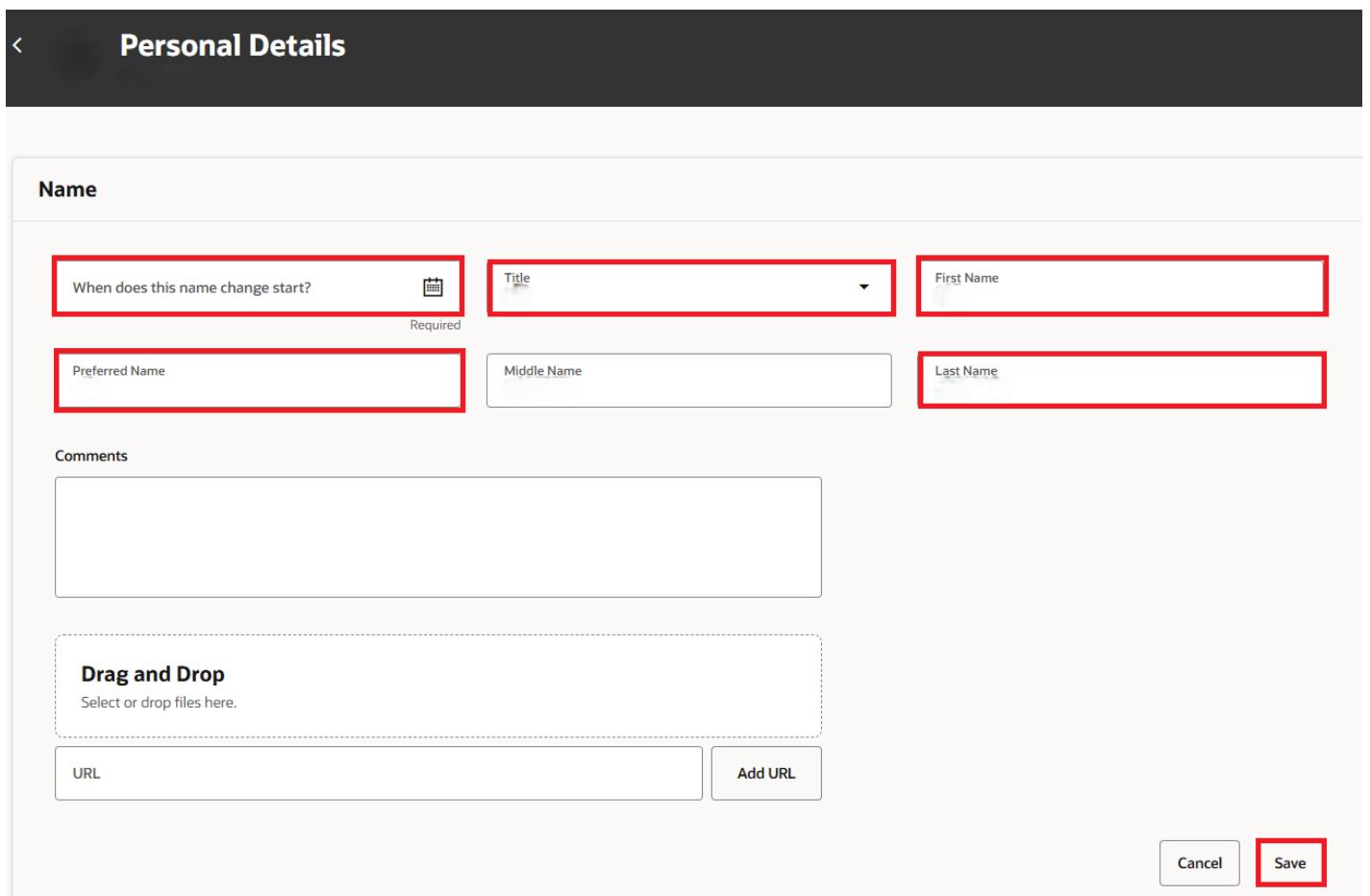
Name

Start Date Title First Name

Preferred Name Middle Name 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**



Personal Details

Name

When does this name change start?

Required

Title

First Name

Preferred Name

Middle Name

Last Name

Comments

Drag and Drop
Select or drop files here.

URL Add URL

Save

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
 P		
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.

The screenshot shows a user interface for updating personal details. At the top, a dark header bar contains a back arrow and the text "Personal Details". Below this is a light gray form area. The "Name" section contains fields for Start Date, Title, First Name, Preferred Name, Middle Name, and Last Name, with a small edit icon. The "Photo" section features a red-bordered "Drag and Drop" area with the placeholder "Select a file or drop one here". At the bottom right of the form are "Cancel" and "Save" buttons, with "Save" being highlighted by a red box.

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

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

Personal Details

Photo

Add a photo to be displayed next to your name.

Demographic info

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
Ethnicity	④	

- 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

Marital/Civil Partnership Status

When does this marital status change start?



Required

Gender
Female

Ethnicity
White - English, Welsh, Northern Irish or British

Living together

Married/Civil partner

Prefer not to say

Separated/Divorced

Single

Widowed

Comments

Drag and Drop

Select or drop files here.

URL

Add URL

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	<p>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.</p> <p>If you do not wish to answer this question you can select "Prefer not to say".</p>
British Sign Language User	<p>This field records whether or not you are a British Sign Language user.</p> <p>If you do not wish to answer this question you can select "Prefer not to say".</p>
HESA Previous Institution	<p>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".</p>
HESA Highest Qualification	<p>Please select the highest qualification you currently hold.</p>
HESA Previous Employment	<p>Please select the option which most closely matches your employment situation before joining the University.</p>

Note: We use the term 'HESA Disability' to harmonise our data reporting to the Higher

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.

URL

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.

URL

Add URL

Cancel

Save

Updating your Additional Person Info

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

The screenshot shows the University of Edinburgh's 'Personal Info' page. At the top, there is a green header bar with the university's logo and name. Below this, a dark grey navigation bar contains a back arrow and the text 'Personal Info'. The main content area is a light grey box containing several circular icons, each representing a different type of information. The 'Additional Person Info' icon, which is a person icon with a plus sign, is highlighted with a red box. Other visible icons include 'Personal Details', 'Document Records', 'Identification Info', 'Contact Info', 'Family and Emergency Contacts', 'Employment Info', 'Additional Assignment Info', and 'My Salary'. Each icon has a brief description below it.

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

Required

HESA Academic Teaching 2

HESA Academic Teaching 3

HESA Academic Teaching 4

HESA Academic Teaching 5

HESA Academic Teaching 6

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	<input type="button" value="Calendar"/>
Religion or Belief	<input type="button" value="▼"/>
Sexual Orientation	<input type="button" value="▼"/>
Do you consider yourself to be trans, or have a trans history?	<input type="button" value="▼"/>
Gender Identity	<input type="button" value="▼"/>

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

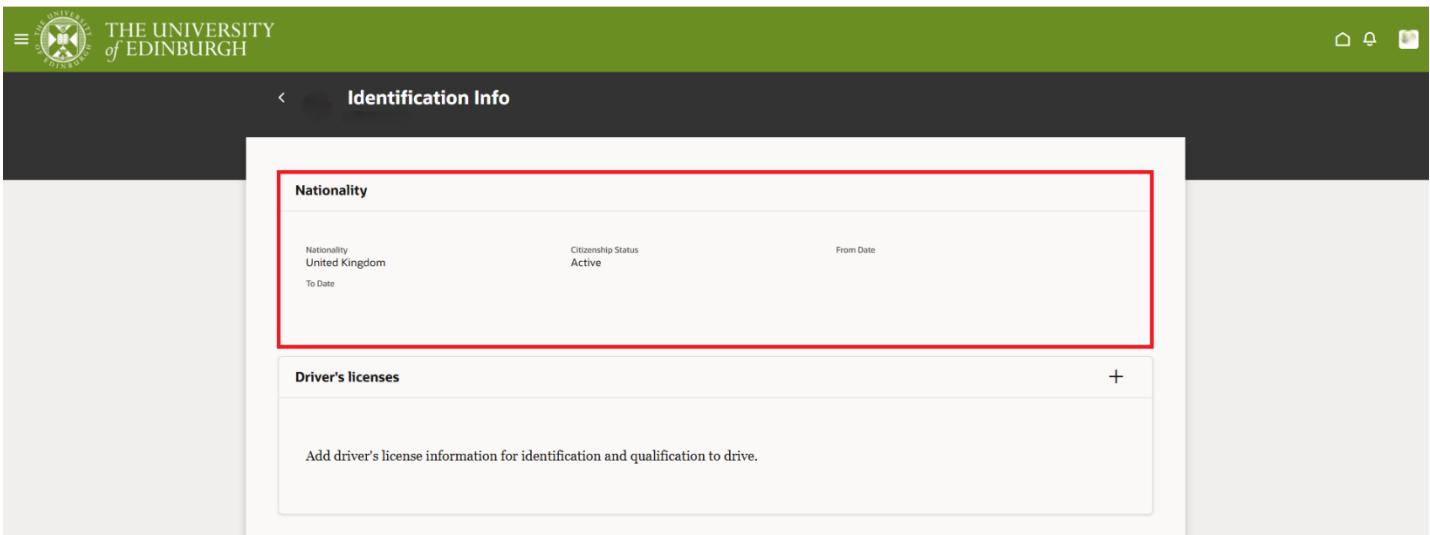
1. From the Home page, open the **Me** section, then click **Personal Information**.
2. Select **Identification Info**.



 Personal Details Details about yourself, such as name, date of birth, marital status, and national identity.	 Document Records Manage your document records and associated attachments, such as birth and marriage certificates, awards, and recognitions.	 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. 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'.



The screenshot shows the 'Identification Info' page. At the top, there is a red box around the 'Nationality' section. This section contains the following information:

Nationality	United Kingdom	Citizenship Status	Active	From Date
To Date				

Below this, there is a 'Driver's licenses' section with a red box around it. It contains a sub-section for 'Add driver's license information for identification and qualification to drive.' A red '+' icon is located to the right of this section.

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.



Identification Info
Anne Apple

Nationality		
Nationality United Kingdom To Date	Citizenship Status Active	From 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

Citizenship Status
Active

From Date

To 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

Citizenship Status
Active

From Date

To 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.