Equality Impact Assessment Template

Before carrying out EqIA, you should familiarise yourself with the University's EqIA Policy Statement and Guidance and Checklist Notes, and undertake our online training on Equality and Diversity and EqIA. These, along with further information and resources, are available at www.ed.ac.uk/schools-departments/equality-diversity/impact-assessment

EqIA covers policies, provisions, criteria, functions, practices and activities, including decisions and the delivery of services, but will be referred to as 'policy/practice' hereinafter.

A. Policy/Practice (name or brief description):

eExpenses – a new application to replace the current Employee Expenses Management (EEM) system which is provided to the University by a third party. The new eExpenses application is an online submission and approval workflow for staff, student and visitor expense claims. It is a Finance application developed 'in house' by Information Services.

B. Reason for Equality Impact Asessment (delete as applicable):

- **Proposed change to exisiting policy/practice**

C. Person responsible for the policy area or practice:

Name: **Elizabeth Welch**

Job title: **Director : Finance Transaction Services University of Edinburgh**

School/service/unit: **Finance**

D. An Impact Assessment should be carried out if any of the following apply to the policy/practice, if it:

- affects primary or high level functions of the University- **Yes**
- IS relevant to the promotion of equality (in terms of the Public Sector Equality Duty "needs" as set out in the Policy and Guidance)?- **Yes**
- It is one which interested parties could reasonably expect the University to have carried out an EqIA - **Yes**

E. Equality Groups

To which equality groups is the policy/practice relevant and why? (delete any that are not relevant):

- Age
- Disability.
- Race (including ethnicity and nationality)
- Religion or belief
- Sex
- Sexual orientation

- Gender reassignment
- Pregnancy and maternity
- Marriage or civil partnership

The system is available to all staff, students and visitors and so has the potential to impact on all protected characteristics however we feel that only disability and race are likely to be potentially impacted by the system.
There is a potential impact on disability as the application is online and therefore needs to comply with accessibility guidelines such as the Web Content Accessibility Guidelines version 2 AA standard and be compatible with assistive technology.
The potential impact on race refers to the fact the application is only in English but we do not envisage this to be an issue as this is the main teaching language of the University so should not cause any disadvantage.

Add notes against the following statements where applicable/relevant:

- On any available information about the needs of relevant equality groups:
  Users within the disability equality group may require the system to be accessible (in terms of current WCAG version 2 guidelines) and to be compatible with assistive technology.
  Users within the race equality group may be impacted as the application is only available in the English language. As the main teaching language of the University is English, however, we do not anticipate this being an issue.
  A pilot of the system has been taking place since July 2015 and, where appropriate, feedback from users is addressed as part of the ongoing development work. The Disability Information Officer has been involved in testing the accessibility of the system and its compatibility with assistive technology.

- Any gaps in evidence/insufficient information to properly assess the policy, and how this be will be addressed:
  At this stage we feel we have sufficient evidence to proceed.

- If application of this policy/practice leads to discrimination (direct or indirect), harassment, victimisation, less favourable treatment for particular equality groups:.
  We do not believe that the application will create any barriers as a result of the comprehensive testing of accessibility during development and changes to be made as a result of the Disability Information Officer's review. The system has been tested to ensure it is compatible with assistive technology for disabled users and adheres to the web content accessibility guidelines version 2 AA standard. If for any reason a disabled member of staff was unable to use the system and we were unable to rectify this we would put in place reasonable adjustments such as paper submission of their expenses or having someone submit their expenses for them using the proxy user functionality. As mentioned previously, the system will only be in English but as English is the main teaching language of the University we do not envisage this should cause any disadvantage.

- If the policy/practice contributes to advancing equality of opportunity[1]
  Yes, we anticipate the new system will be more accessible to disabled users than the old system and easier to use which should benefit all users.

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[1] This question does not apply to the protected characteristic of marriage or civil partnership

- If there is an opportunity in applying this policy/practice to foster good relations:
  We hope that our careful consideration of equality and diversity during the development of eExpenses demonstrates the University's commitment to this cause and encourages others to do the same.

- If the policy/practice create any barriers for any other groups?
  All staff have access to free 24 hour computing facilities so there should be no impact on staff on different incomes and of different socioeconomic status.

- How the communication of the policy/practice is made accessible to all groups, if relevant?
  All communication regarding the upgrade will be available in alternative formats upon request. Any individual issues regarding accessibility that arise will be considered and we will attempt to resolve them and will put in place reasonable adjustments wherever appropriate.

- How equality groups or communities are involved in the development, review and/or monitoring of the policy or practice?
  Accessibility feedback (both positive and negative) is collected, reviewed and addressed where appropriate. This has been ongoing since the pilot of the application commenced in July 2015. This review of feedback is ongoing. If changes are made to the system further accessibility testing will be conducted to ensure the system remains accessible.

- Any potential or actual impact of applying the policy or practice, with regard to the need to eliminate discrimination, advance equality and promote good relations:
  We will need to remind staff of the need to make reasonable adjustments for disabled users if required as well as to provide all information about the new system in alternative formats upon request.

F. Equality Impact Assessment Outcome

Select one of the four options below to indicate how the development/review of the policy/practice will be progressed and state the rationale for the decision. (Delete the options that do not apply):

Option 1: No change required – the assessment is that the policy/practice is/will be robust.
There is no evidence of potentially unlawful discrimination and all reasonable opportunities to advance equality have been taken, subject to continued monitoring and review.

G. Action and Monitoring

1. Specify the actions required for implementing findings of this EqIA and how the policy or practice will be monitored in relation to its equality impact (or note where this is specified above).
   Users can provide feedback, including those relating to equality impact, via an online eExpenses feedback form or through other methods such as verbally to their line manager or by phone/email to the IS helpline. This feedback will be monitored for any potential positive or negative effect on any of the 9 protected characteristics and acted on where appropriate.
   Staff will be reminded of the need to make reasonable adjustments if required.

2. When will the policy/practice next be reviewed? **In January 2017 or when we receive any positive or negative feedback related to any of the 9 protected characteristics.**
H. Publication of EqIA Can this EqIA be published in full, now? **Yes**
I. Sign-off EqIA undertaken by (name(s) and job title(s**)): Stephanie McHugh, Financial Systems Project Officer** Accepted by (name): **Elizabeth Welch, Finance Transaction Services University of Edinburgh** [This will normally be the person responsible for the policy/practice named above. If not, specify job-title/role.] Date: **21/01/2016**

Retain a copy of this form for your own records and send a copy to
equalitydiversity@ed.ac.uk