

## Using Personal Information Summary Page

You use the Employee Personal Information page to review, add, update, or delete personal information in the PeopleSoft database. You can access each transaction individually or use the **Personal Information** page to review all personal information at once. Links on the **Personal Information** page provide quick access to the various transactions that you can use to make changes, if necessary.

The following transactions are designed to use workflow for self-service. If workflow is activated, when a user performs one of the following transactions, the system automatically routes the transaction request to the appropriate person for approval.

- Name change
- Marital status change
- Address change

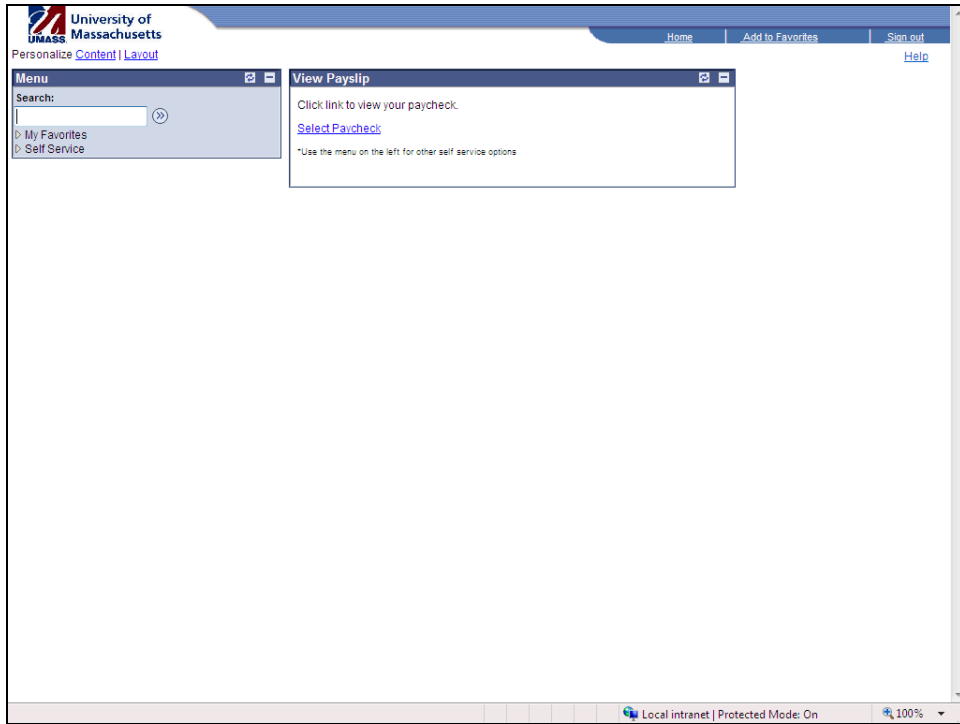
Upon completion of this lesson, you will be able to:

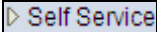
- Maintain home and mailing address information.
- Maintain emergency contact information.
- Maintain email address information.
- Maintain phone number information.
- View personal information.

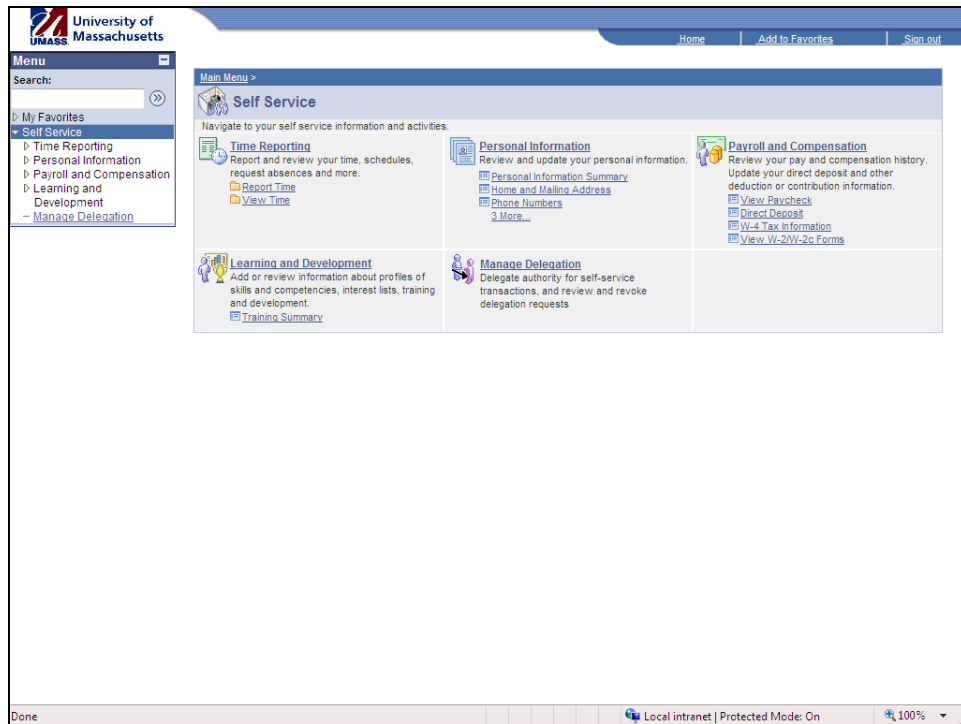
### Procedure

#### Consider this scenario:

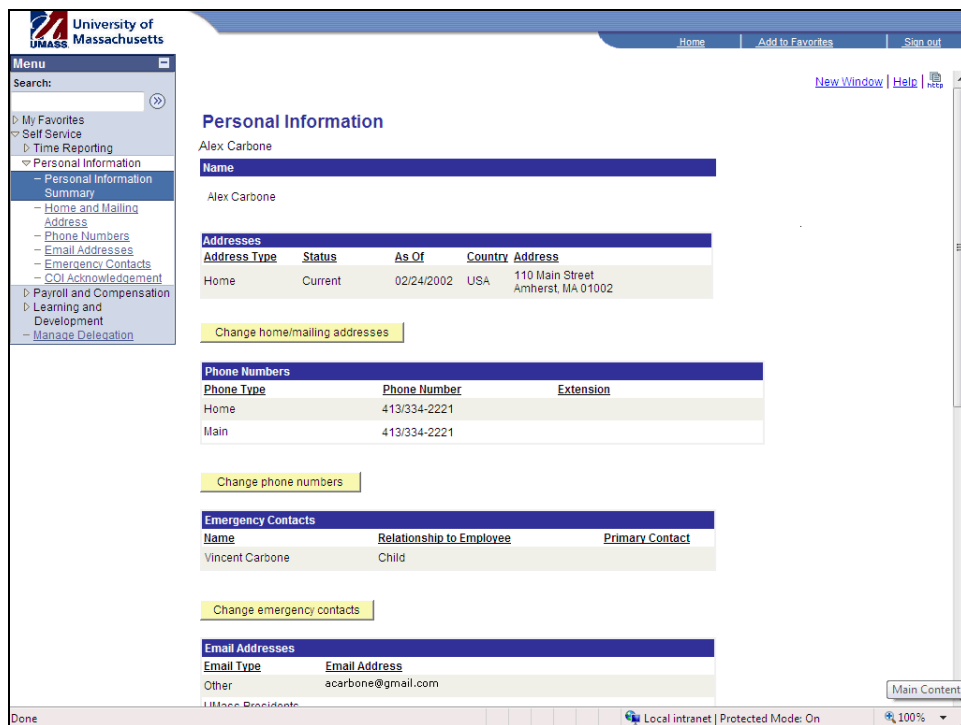
You want to review the information that HR has on file for you. Use the Personal Information page to view and update your personal information.



Step	Action
1.	<p>Begin by navigating to the <b>Personal Information Summary</b> page.</p> <p>Click the <b>Self Service</b> link.</p> <p></p>



Step	Action
2.	Click the <b>Personal Information</b> link.
3.	Click the <b>Personal Information Summary</b> link.



Step	Action
4.	Use the <b>Personal Information</b> page to review your current data and to access specific eProfile pages.
5.	Verify the <b>Employee Name</b> information.  <i>Note:</i> The <b>Employee Name</b> is view only. If the name is incorrect, contact the Human Resources department.
6.	Use the <b>Addresses</b> section to view your address information.

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**Personal Information**  
Alex Carbone

**Name**  
Alex Carbone

**Addresses**

Address Type	Status	As Of	Country	Address
Home	Current	02/24/2002	USA	110 Main Street Amherst, MA 01002

[Change home/mailling addresses](#)

**Phone Numbers**

Phone Type	Phone Number	Extension
Home	413/334-2221	
Main	413/334-2221	

[Change phone numbers](#)

**Emergency Contacts**

Name	Relationship to Employee	Primary Contact
Vincent Carbone	Child	

[Change emergency contacts](#)


**Email Addresses**

Email Type	Email Address
Other	acarbone@gmail.com


[Main Content](#)

Done | Local intranet | Protected Mode: On | 100%

Step	Action
7.	Click the <b>Change home/mailling addresses</b> button. <a href="#">Change home/mailling addresses</a>
8.	Use the <b>Home and Mailing Address</b> page to add or update your address.


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## Home and Mailing Address

Alex Carbone

If you need to add or update an address where the country is not "USA", contact your campus HR/Payroll office.

In addition, not all university systems are integrated (share data) which means that if there are other UMASS applications that require this same information (i.e. Student Systems, Accounting Systems, etc.) you may also need to inform them of your information change.

Address Type	Status	As Of	Country	Address	
Home	Current	02/24/2002	USA	110 Main Street Amherst, MA 01002	<a href="#">Edit</a>

\*Address Type:  [Add](#)

\* Required Field


[Return to Personal Information](#)

Done


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Step	Action
9.	Click the <b>Address Type</b> list. <div> <input type="text"/> </div>


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## Home and Mailing Address

Alex Carbone

If you need to add or update an address where the country is not "USA", contact your campus HR/Payroll office.

In addition, not all university systems are integrated (share data) which means that if there are other UMASS applications that require this same information (i.e. Student Systems, Accounting Systems, etc.) you may also need to inform them of your information change.

Address Type	Status	As Of	Country	Address	
Home	Current	02/24/2002	USA	110 Main Street Amherst, MA 01002	<a href="#">Edit</a>

\*Address Type:  [Add](#)

\* Required Field

[Return to Personal Information](#)

Done

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Step	Action
10.	You can add a mailing address by selecting the <b>Mail</b> option.  For this example, the home address is the same as the mailing address.
11.	Click the <b>Return to Personal Information</b> link. <a href="#">Return to Personal Information</a>
12.	Use the <b>Phone Numbers</b> section to view your phone information.

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**Personal Information**

Alex Carbone

**Name**

Alex Carbone

**Addresses**

Address Type	Status	As Of	Country	Address
Home	Current	02/24/2002	USA	110 Main Street Amherst, MA 01002

[Change home/mailling addresses](#)

**Phone Numbers**

Phone Type	Phone Number	Extension
Home	413/334-2221	
Main	413/334-2221	

[Change phone numbers](#)

**Emergency Contacts**

Name	Relationship to Employee	Primary Contact
Vincent Carbone	Child	

[Change emergency contacts](#)


**Email Addresses**

Email Type	Email Address
Other	acarbone@gmail.com


[Main Content](#)

Done Local intranet | Protected Mode: On 100%

Step	Action
13.	Click the <b>Change phone numbers</b> button. <a href="#">Change phone numbers</a>
14.	Use the <b>Phone Numbers</b> page to add or update your phone information.
15.	For this example, Alex only uses a mobile phone. He will add the mobile phone number and delete the older Home and Main phone numbers.


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## Phone Numbers

Alex Carbone

Enter your phone numbers below.

Phone Type	*Telephone	Extension	
Home	<input type="text" value="413/334-2221"/>	<input type="text"/>	<a href="#">Delete</a>
Main	<input type="text" value="413/334-2221"/>	<input type="text"/>	<a href="#">Delete</a>

[Add a Phone Number](#)

\* Required Field

[Save](#)


[Return to Personal Information](#)

Done


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Step	Action
16.	Click the <b>Add a Phone Number</b> button. <div>Add a Phone Number</div>
17.	Click the <b>Phone Type</b> list. <div></div>


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## Phone Numbers

Alex Carbone

Enter your phone numbers below.

Phone Type	*Telephone	Extension	
Home	413/334-2221		Delete
Main	413/334-2221		Delete
			Delete


Billing  
Campus  
Do NOT Call  
Dormitory  
FAX  
Mailing  
**Mobile**  
Other  
Pager 1  
Pager 2  
Permanent  
Telex  
Work

Done


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Step	Action
18.	Click the <b>Mobile</b> list item. <div>Mobile</div>


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## Phone Numbers

Alex Carbone

Enter your phone numbers below.

Phone Type	*Telephone	Extension	
Home	413/334-2221		Delete
Main	413/334-2221		Delete
Mobile			Delete

Add a Phone Number

\* Required Field

Save


[Return to Personal Information](#)

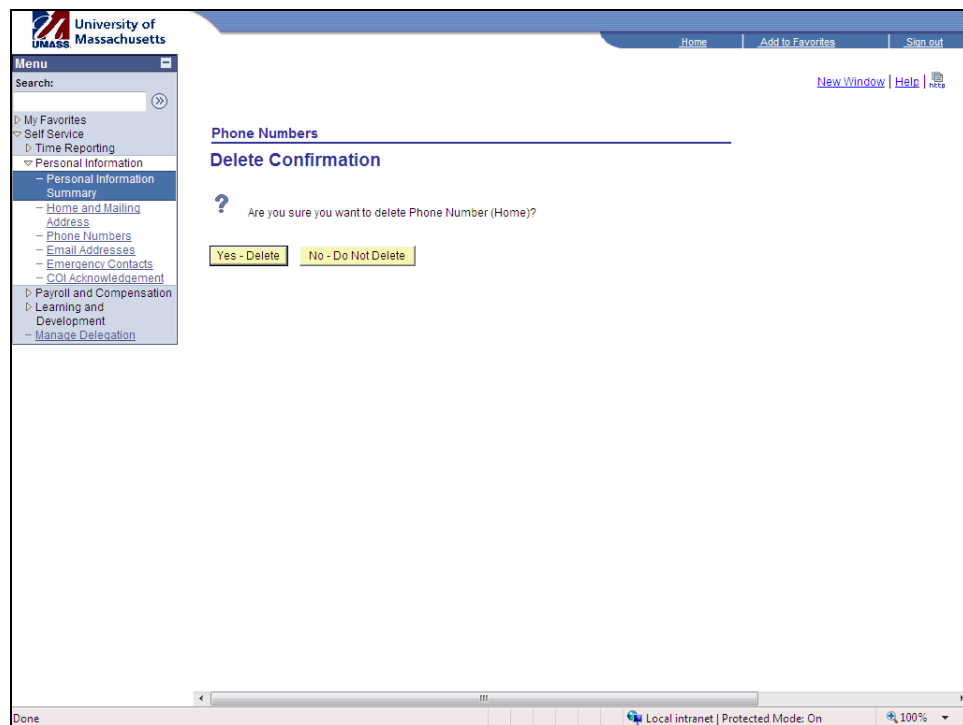
Done

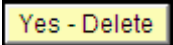
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Step	Action
19.	Enter the desired information into the <b>Telephone</b> field.  Enter " <b>413/210-1223</b> ".
20.	Delete the old <b>Home</b> and <b>Main</b> phone numbers.  Click the <b>Delete</b> button. 



Step	Action
21.	Click the <b>Yes - Delete</b> button. 


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## Phone Numbers

Alex Carbone

Enter your phone numbers below.

Phone Type	*Telephone	Extension	
Main	<input type="text" value="413/334-2221"/>	<input type="text"/>	<a href="#">Delete</a>
Mobile	<input type="text" value="413/210-1223"/>	<input type="text"/>	<a href="#">Delete</a>

[Add a Phone Number](#)

\* Required Field

[Save](#)


[Return to Personal Information](#)

Done


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Step	Action
22.	Click the <b>Delete</b> button. <div> Delete </div>


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## Phone Numbers

### Delete Confirmation

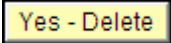
? Are you sure you want to delete Phone Number (Main)?

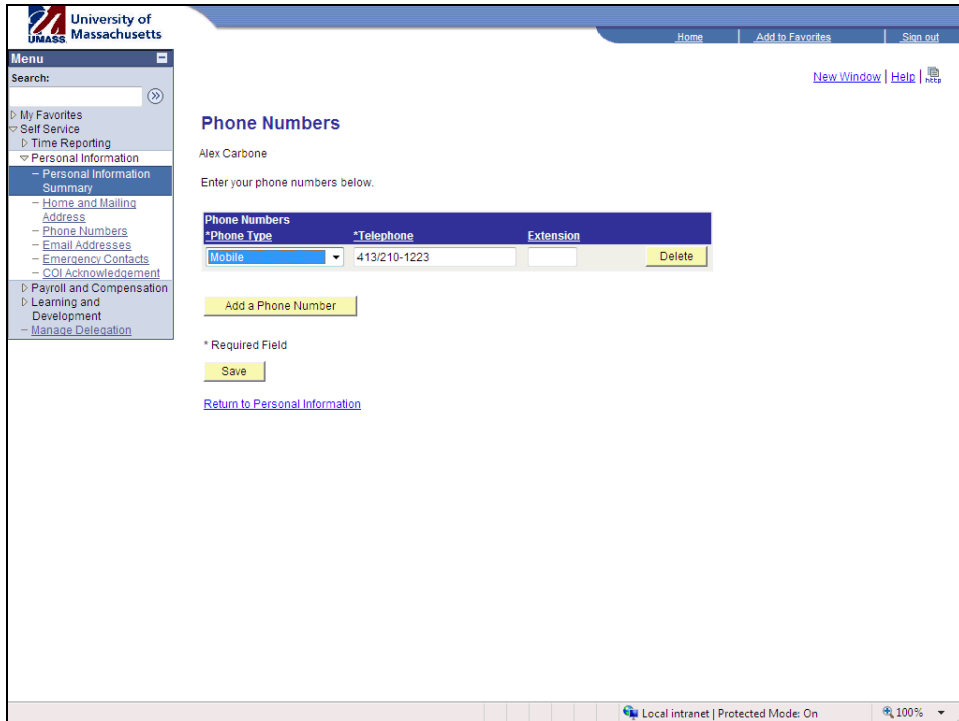
[Yes - Delete](#)
[No - Do Not Delete](#)

Done

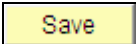
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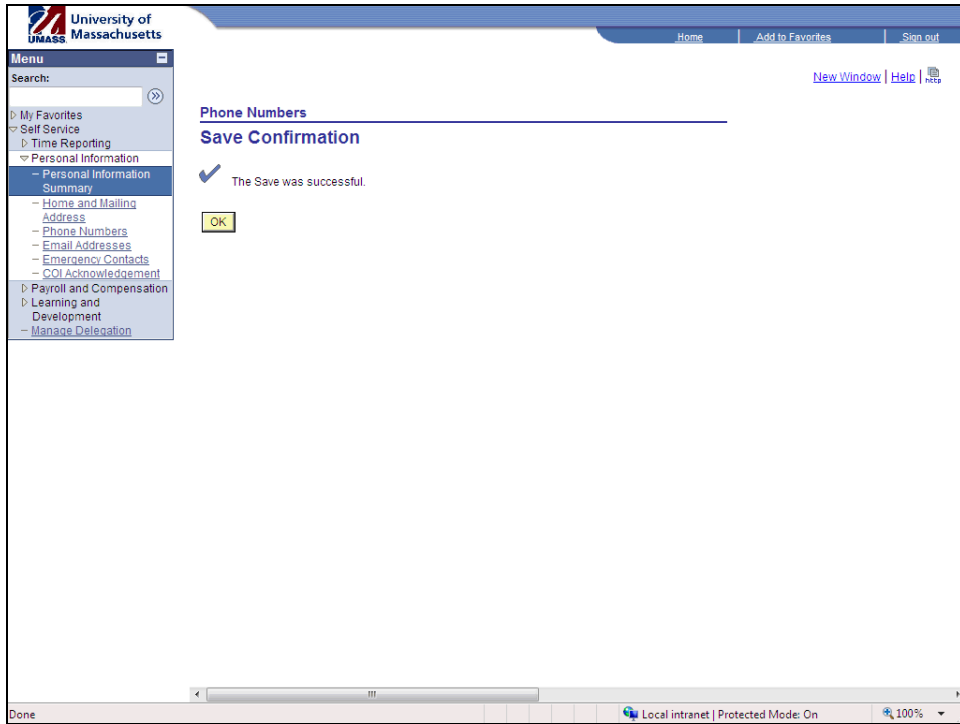
100%


Step	Action
23.	Click the <b>Yes - Delete</b> button. 

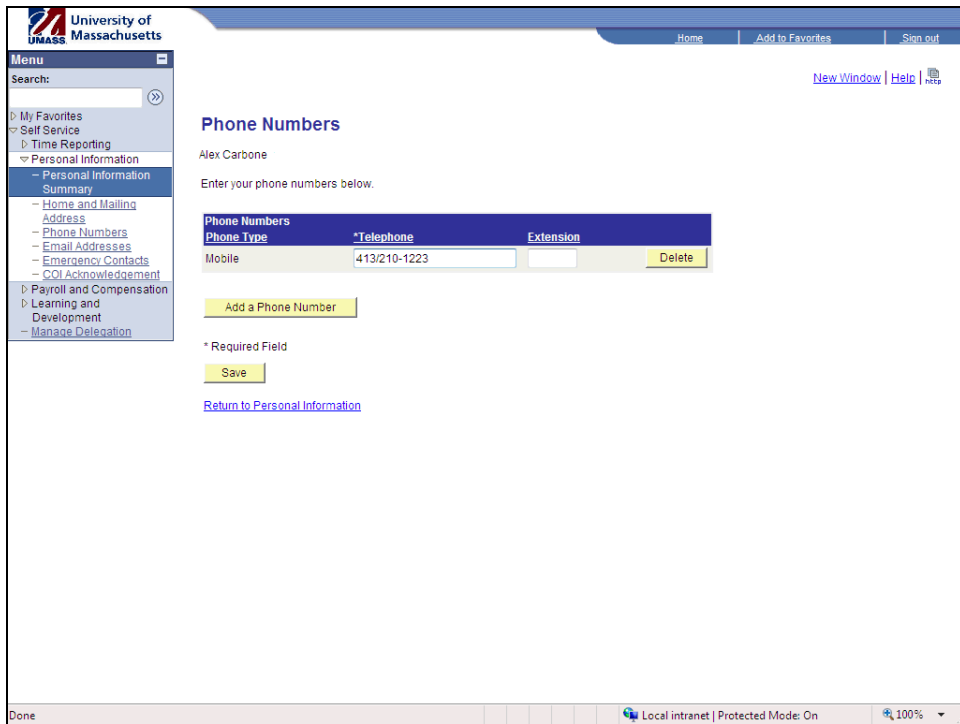


The screenshot shows the 'Phone Numbers' section of the University of Massachusetts Self Service portal. The user is Alex Carbone. The page prompts the user to 'Enter your phone numbers below.' and displays a table with one entry: a Mobile phone number 413/210-1223. A 'Delete' button is next to the number. Below the table is an 'Add a Phone Number' button. At the bottom, there is a 'Save' button and a link to 'Return to Personal Information'. The portal includes a left-hand menu with options like 'My Favorites', 'Self Service', 'Time Reporting', 'Personal Information', 'Home and Mailing Address', 'Phone Numbers', 'Email Addresses', 'Emergency Contacts', 'COI Acknowledgement', 'Payroll and Compensation', 'Learning and Development', and 'Manage Delegation'. The top navigation bar includes 'Home', 'Add to Favorites', and 'Sign out'.

Step	Action
24.	Click the <b>Save</b> button. 



Step	Action
25.	Click the <b>OK</b> button. 



Step	Action
26.	Click the <b>Return to Personal Information</b> link. <a href="#">Return to Personal Information</a>

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**Personal Information**  
Alex Carbone

**Name**  
Alex Carbone

**Addresses**

Address Type	Status	As Of	Country	Address
Home	Current	02/24/2002	USA	110 Main Street Amherst, MA 01002

[Change home/mailling addresses](#)

**Phone Numbers**

Phone Type	Phone Number	Extension
Mobile	413/210-1223	

[Change phone numbers](#)

**Emergency Contacts**

Name	Relationship to Employee	Primary Contact
Vincent Carbone	Child	

[Change emergency contacts](#)

**Email Addresses**

Email Type	Email Address
Other	acarbone@gmail.com
UMass Presidents Office	acarbone@umasssp.edu

Done Local intranet | Protected Mode: On 100%

Step	Action
27.	Click the <b>Change emergency contacts</b> button. <a href="#">Change emergency contacts</a>


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## Emergency Contacts

Alex Carbone

Contact Name	Relationship to Employee		
Vincent Carbone	Child	Edit	Delete

Primary Contact: Vincent Carbone [Change the primary contact](#)

[Add an Emergency Contact](#)

[Return to Personal Information](#)

Local intranet | Protected Mode: On

Step	Action
28.	Use the <b>Emergency Contacts</b> page to verify and edit your emergency contacts.


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## Emergency Contacts

Alex Carbone

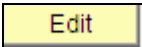
Contact Name	Relationship to Employee		
Vincent Carbone	Child	Edit	Delete

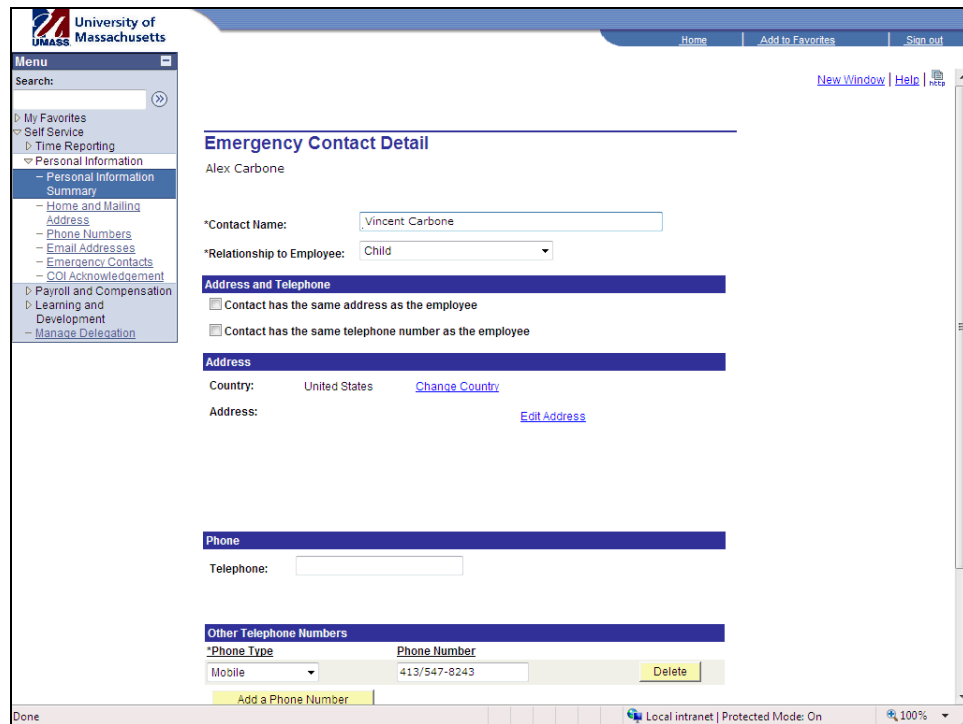
Primary Contact: Vincent Carbone [Change the primary contact](#)

[Add an Emergency Contact](#)

[Return to Personal Information](#)

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Step	Action
29.	Click the <b>Edit</b> button. 



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**Emergency Contact Detail**

Alex Carbone

\*Contact Name: Vincent Carbone

\*Relationship to Employee: Child

**Address and Telephone**

☐ Contact has the same address as the employee

☐ Contact has the same telephone number as the employee

**Address**

Country: United States [Change Country](#)

Address: [Edit Address](#)

**Phone**


Telephone:

**Other Telephone Numbers**

*Phone Type	Phone Number	
Mobile	413/547-8243	<a href="#">Delete</a>

[Add a Phone Number](#)

Done Local intranet | Protected Mode: On 100%

Step	Action
30.	Add your <b>Emergency Contact's</b> address.  Click the <b>Edit Address</b> link. 

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  - PeopleTools

**Edit Address**

Country: United States [Change Country](#)

Address 1: 20 Chicopee St

Address 2:

City: Chicopee State: MA Massachusetts Postal: 01020

County:

OK Cancel QuickAddress Override

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Step	Action
31.	<p>The address displays on the <b>Edit Address</b> page.</p> <p>Use the <b>QuickAddress</b> button to update and validate the address.</p>

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**Edit Address**

Country: United States [Change Country](#)

Address 1: 20 Chicopee St

Address 2:

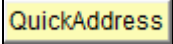
City: Chicopee State: MA Massachusetts Postal: 01020

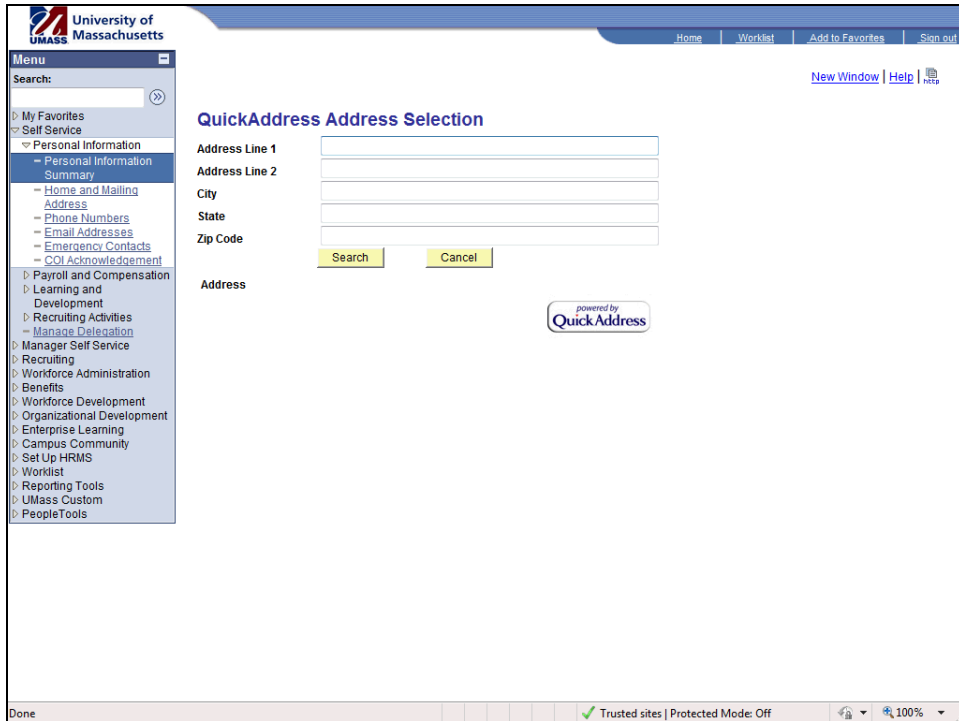
County:

OK Cancel QuickAddress Override

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Step	Action
32.	Click the <b>QuickAddress</b> button. 



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**QuickAddress Address Selection**

Address Line 1

Address Line 2

City

State

Zip Code

Address

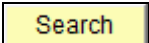
powered by QuickAddress

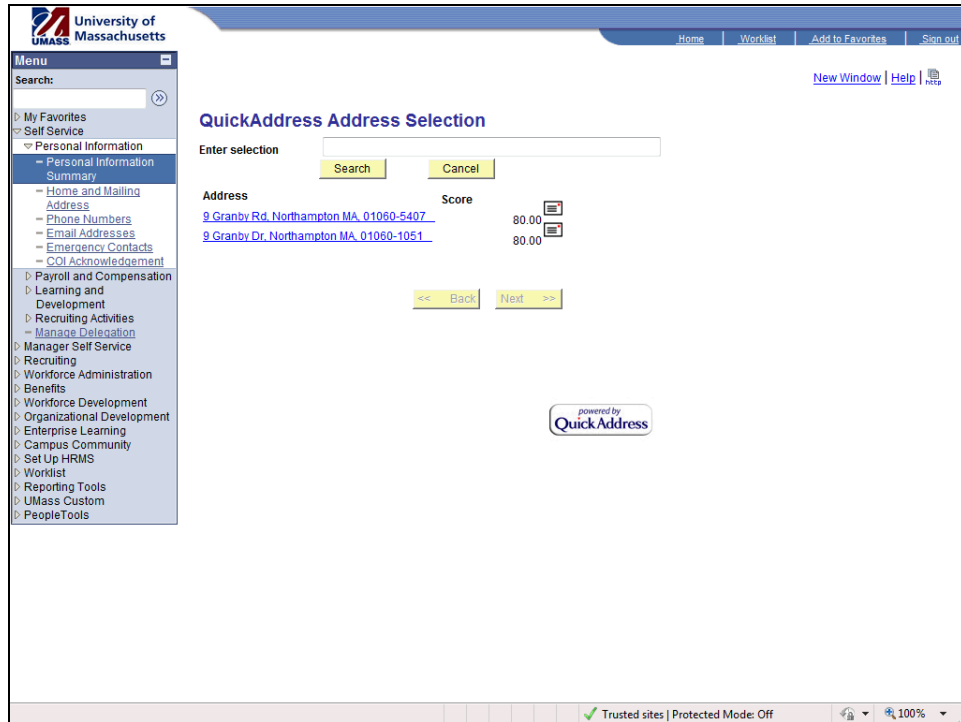
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Done Trusted sites | Protected Mode: Off 100%

Step	Action
33.	Enter the desired information into the <b>Address Line 1</b> field. Enter " <b>9 Granby Street</b> ".
34.	Enter the desired information into the <b>City</b> field. Enter " <b>Northampton</b> ".
35.	Enter the desired information into the <b>State</b> field. Enter " <b>MA</b> ".
36.	Enter the desired information into the <b>Zip Code</b> field. Enter " <b>01060</b> ".
37.	Click the <b>Search</b> button. 



Step	Action
38.	In the case where an exact match is not found, the <b>QuickAddress Address Selection</b> page appears. This page displays the top matches for the address you entered.
39.	What scenarios would cause the <b>QuickAddress Address Selection</b> page to appear? 1) Entering a Unit or Apartment number depending on how your address is officially listed. 2) Inaccurate Postal Code 3) Incorrect spelling 4) New or unofficial address
40.	<b>Note:</b> When entering a new or unofficial address (e.g., a new apartment building), you can click the <b>Cancel</b> button. The <b>Edit Address</b> page will open. You can then click the <b>Override</b> link under the <b>QuickAddress</b> button to enter the address manually. This manual process should only be used for this type of scenario. All other addresses should be validated through QAS.
41.	Click the <b>9 Granby Rd, Northampton MA, 01060-5407</b> link. <a href="#">9 Granby Rd, Northampton MA, 01060-5407</a>
42.	The address has been validated and is grayed out.  If you need to make any changes to the address, you can click the <b>QuickAddress</b> button

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**Edit Address**

Country:  [Change Country](#)

Address 1:

Address 2:

City:  State:   Postal:

County:

[Override](#)

Done Trusted sites | Protected Mode: Off 100%

Step	Action
43.	Click the <b>OK</b> button.

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    - Email Addresses
    - Emergency Contacts
    - COI Acknowledgement
  - Payroll and Compensation
  - Learning and Development
    - Manage Delegation

**Emergency Contact Detail**

Alex Carbone

\*Contact Name:

\*Relationship to Employee:

**Address and Telephone**

☐ Contact has the same address as the employee

☐ Contact has the same telephone number as the employee

**Address**

Country:  [Change Country](#)

Address:  [Edit Address](#)

Northampton, MA 01060-5407

**Phone**

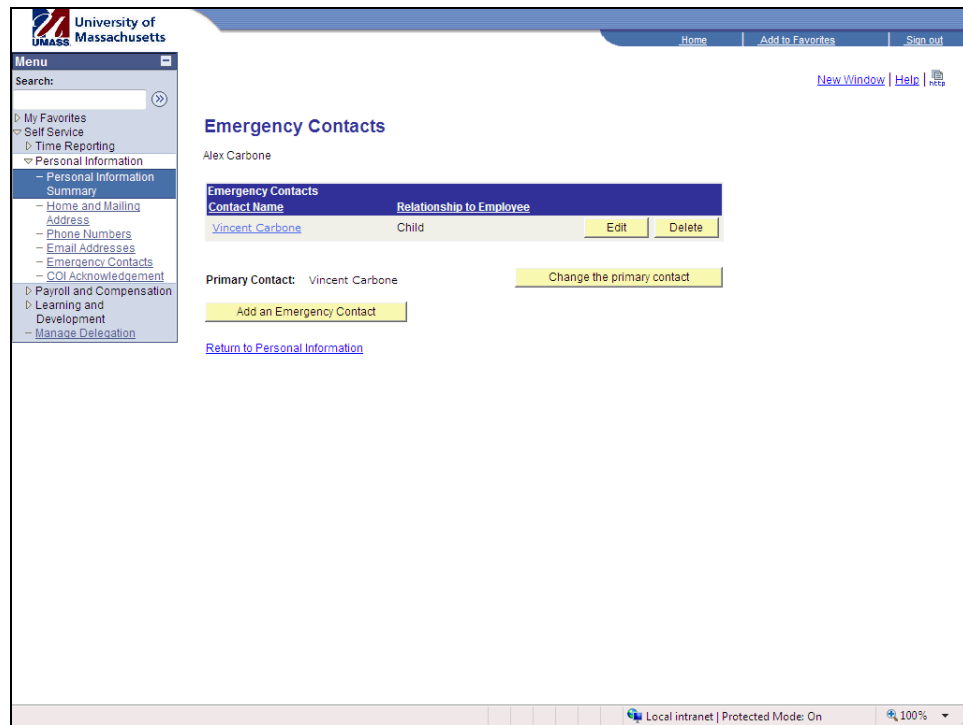
Telephone:

**Other Telephone Numbers**


\*Phone Type:

Done Local intranet | Protected Mode: On 100%


Step	Action
44.	Click the <b>Scrollbar</b> .
45.	Click the <b>Return to Emergency Contacts</b> link. <a href="#">Return to Emergency Contacts</a>



Step	Action
46.	Click the <b>Return to Personal Information</b> link. <a href="#">Return to Personal Information</a>


**University of Massachusetts**

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**Menu**

Search:

- My Favorites
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- Time Reporting
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  - Personal Information Summary
  - Home and Mailing Address
  - Phone Numbers
  - Email Addresses
  - Emergency Contacts
  - COI Acknowledgement
- Payroll and Compensation
- Learning and Development
- Manage Delegation

## Personal Information

Alex Carbone

**Name**

Alex Carbone

**Addresses**

Address Type	Status	As Of	Country	Address
Home	Current	02/24/2002	USA	110 Main Street Amherst, MA 01002

Change home/mailling addresses

**Phone Numbers**

Phone Type	Phone Number	Extension
Mobile	413/210-1223	

Change phone numbers

**Emergency Contacts**

Name	Relationship to Employee	Primary Contact
Vincent Carbone	Child	


Change emergency contacts

**Email Addresses**


Email Type	Email Address
Other	acarbone@gmail.com
UMass Presidents Office	acarbone@umassp.edu

Done
Local intranet | Protected Mode: On
100%

Step	Action
47.	Click <b>Scrollbar</b> .


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**Menu**

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Mobile 413/210-1223

Change phone numbers

**Emergency Contacts**

Name	Relationship to Employee	Primary Contact
Vincent Carbone	Child	

Change emergency contacts

**Email Addresses**

Email Type	Email Address
Other	acarbone@gmail.com
UMass Presidents Office	acarbone@umassp.edu

Change email addresses

**Ethnic Groups**

Description	Primary
White	

**Employee Information**

Gender: Male

Date of Birth: 03/24/1952


Contact the Human Resources department if any of your Employee Information is incorrect.

Done
Local intranet | Protected Mode: On
100%


Step	Action
48.	Click the <b>Change email addresses</b> button. <div>Change email addresses</div>

The screenshot shows the University of Massachusetts Self Service portal. On the left is a navigation menu with options like My Favorites, Self Service, Time Reporting, and Personal Information. The 'Email Addresses' page for Alex Carbone is displayed. It features a table with two columns: 'Email Type' and 'Email Address'. The table lists two email addresses: 'Other' (acarbone@gmail.com) and 'UMass Presidents Office' (acarbone@umassp.edu). Each row has a 'Delete' button. Below the table is an 'Add an Email Address' button. At the bottom, there is a 'Save' button and a link to 'Return to Personal Information'. The page also includes a search bar, a 'New Window' link, and a 'Help' link. The status bar at the bottom indicates 'Local intranet | Protected Mode: On' and '100%' zoom.

Step	Action
49.	Use the <b>Email Addresses</b> page to verify and edit your Email addresses.


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**Menu**

Search:

- My Favorites
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  - Home and Mailing Address
  - Phone Numbers
  - Email Addresses
  - Emergency Contacts
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- Manage Delegation

## Email Addresses

Alex Carbone

Email Type	Email Address	
Other	<input type="text" value="acarbone@gmail.com"/>	<a href="#">Delete</a>
UMass Presidents Office	acarbone@umassp.edu	<a href="#">Delete</a>

[Add an Email Address](#)


\* Required Field

[Save](#)


[Return to Personal Information](#)

Done
Local intranet | Protected Mode: On
100%

Step	Action
50.	Click the <b>Return to Personal Information</b> link. <a href="#">Return to Personal Information</a>


**University of Massachusetts**

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**Menu**

Search:

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  - Email Addresses
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- Payroll and Compensation
- Learning and Development
- Manage Delegation

## Personal Information

Alex Carbone

**Name**

Alex Carbone

**Addresses**

Address Type	Status	As Of	Country	Address
Home	Current	02/24/2002	USA	110 Main Street Amherst, MA 01002

[Change home/mailling addresses](#)

**Phone Numbers**

Phone Type	Phone Number	Extension
Mobile	413/210-1223	

[Change phone numbers](#)

**Emergency Contacts**

Name	Relationship to Employee	Primary Contact
Vincent Carbone	Child	

[Change emergency contacts](#)

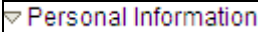
**Email Addresses**

Email Type	Email Address
Other	acarbone@gmail.com
UMass Presidents Office	acarbone@umassp.edu

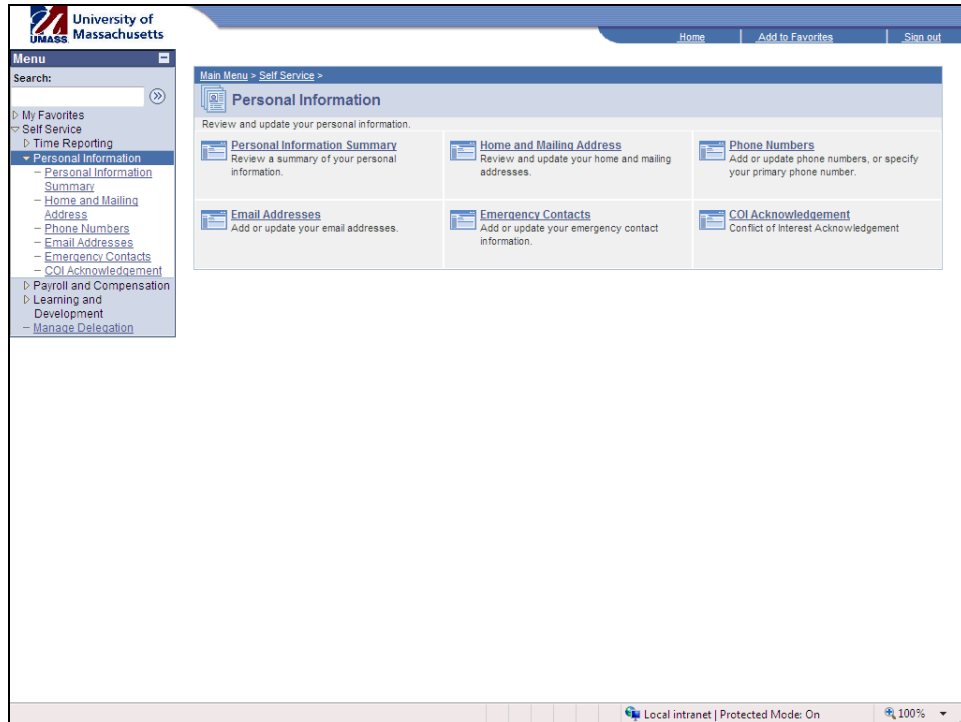
Done
Local intranet | Protected Mode: On
100%

Step	Action
51.	Click <b>Scrollbar</b> .
52.	Verify that the <b>Gender</b> and <b>Date of Birth</b> information is correct.  <i>Note:</i> If the data in the <b>Employee Information</b> section is incorrect, contact the Human Resources department.
53.	Click the <b>Scrollbar</b> .

The screenshot shows the 'University of Massachusetts' Self Service portal. The left sidebar contains a 'Menu' with options like 'My Favorites', 'Self Service', 'Time Reporting', and 'Personal Information'. The 'Personal Information' section is expanded, showing sub-links for 'Summary', 'Home and Mailing Address', 'Phone Numbers', 'Email Addresses', 'Emergency Contacts', and 'COI Acknowledgement'. The main content area displays the 'Personal Information' for Alex Carbone. It includes a 'Name' field with 'Alex Carbone', a table of 'Addresses' (Home, Current, 02/24/2002, USA, 110 Main Street, Amherst, MA 01002), a 'Phone Numbers' section (Mobile, 413/210-1223), an 'Emergency Contacts' section (Vincent Carbone, Child), and an 'Email Addresses' section (Other, acarbone@gmail.com, UMass Presidents Office, acarbone@umassp.edu). Each section has a corresponding 'Change' button.

Step	Action
54.	Click the <b>Personal Information</b> link. 





Step	Action
55.	<b>Note:</b> The navigation links on the <b>Personal Information</b> page provide links to each of the individual sections that the employee can review and edit that are also available on the <b>Personal Information Summary</b> page.
56.	Congratulations! You have successfully viewed the Personal Information Summary page. <b>End of Procedure.</b>