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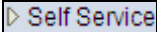
Upon completion of this lesson, you will be able to:

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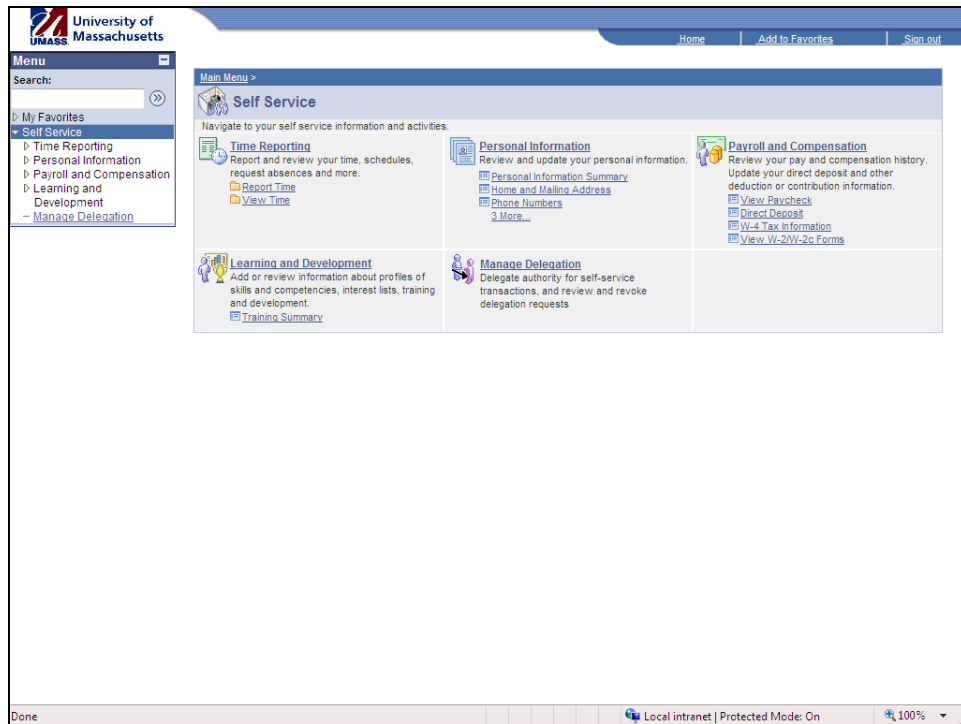- View personal information.

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.
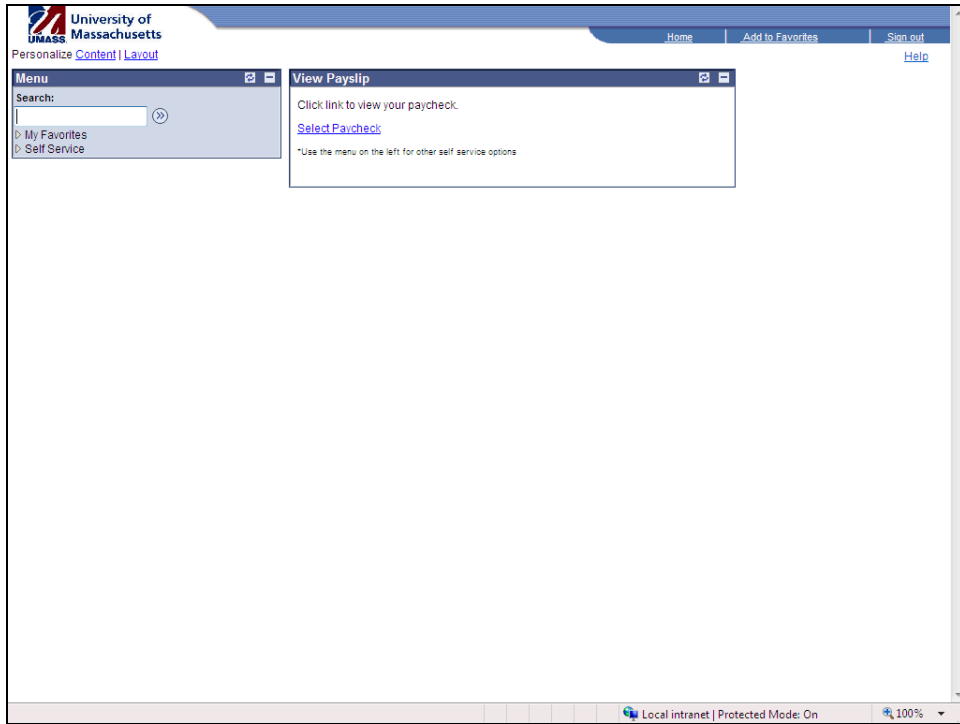
Step	Action
1.	Begin by navigating to the **Personal Information Summary** page. Click the **Self Service** link.

Step	Action
2.	Click the **Personal Information** link.
3.	Click the **Personal Information Summary** link.
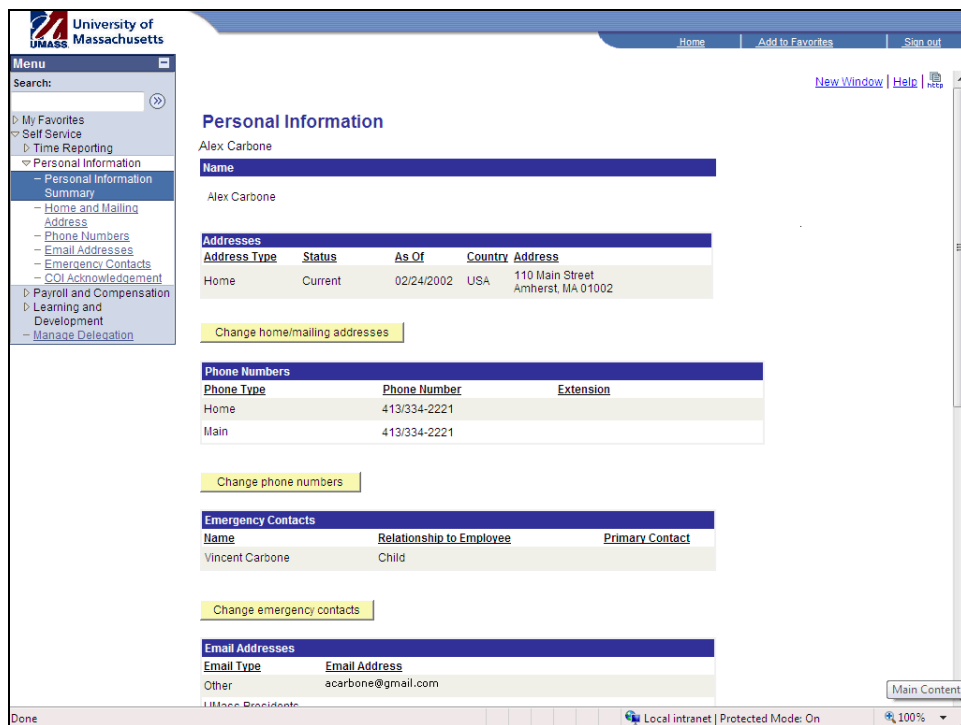
Step	Action
4.	Use the **Personal Information** page to review your current data and to access specific eProfile pages.
5.	Verify the **Employee Name** information. *Note:* The **Employee Name** is view only. If the name is incorrect, contact the Human Resources department.
6.	Use the **Addresses** section to view your address information.

Step	Action
7.	Click the **Change home/mailing addresses** button. Change home/mailing addresses
8.	Use the **Home and Mailing Address** page to add or update your address.

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.

Addresses

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

*Address Type: [▼]   Add

* Required Field

Return to Personal Information

Step	Action
9.	Click the **Address Type** list. [▼]

Home and Mailing Address

Alex Carbone

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Addresses

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

*Address Type: [▼]   Add

Mail

* Required Field

Return to Personal Information

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

Step	Action
13.	Click the **Change phone numbers** button. Change phone numbers
14.	Use the **Phone Numbers** 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.

Step	Action
16.	Click the **Add a Phone Number** button.
17.	Click the **Phone Type** list.

Step	Action
18.	Click the **Mobile** list item. Mobile

Step	Action
19.	Enter the desired information into the **Telephone** field. Enter "**413/210-1223**".
20.	Delete the old **Home** and **Main** phone numbers. Click the **Delete** button. ![Delete button]
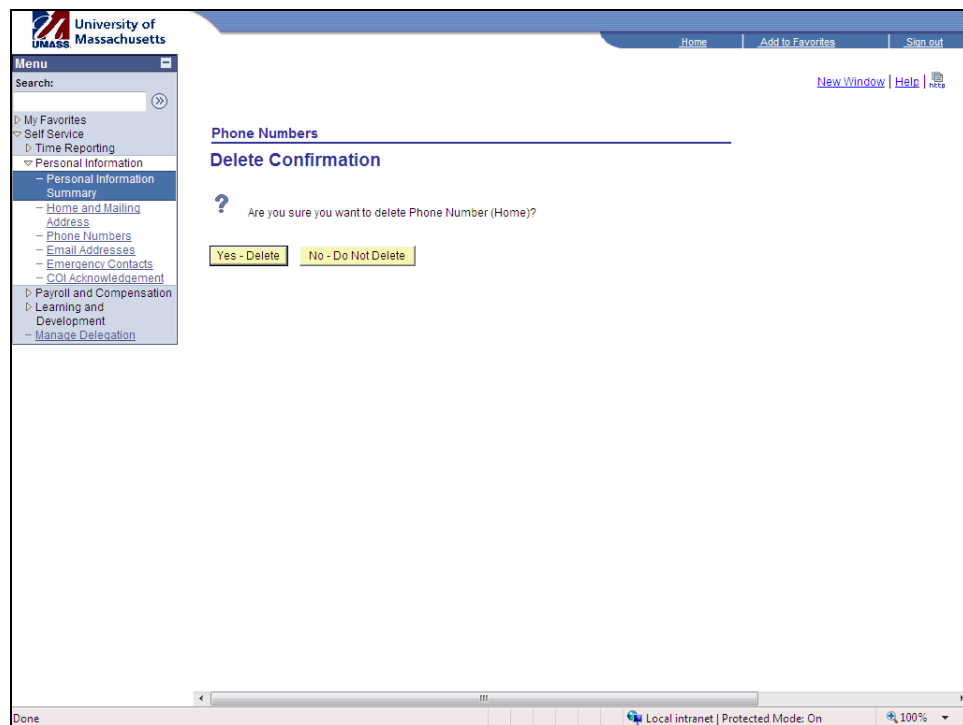
Step	Action
21.	Click the **Yes - Delete** button. ![Yes - Delete button]
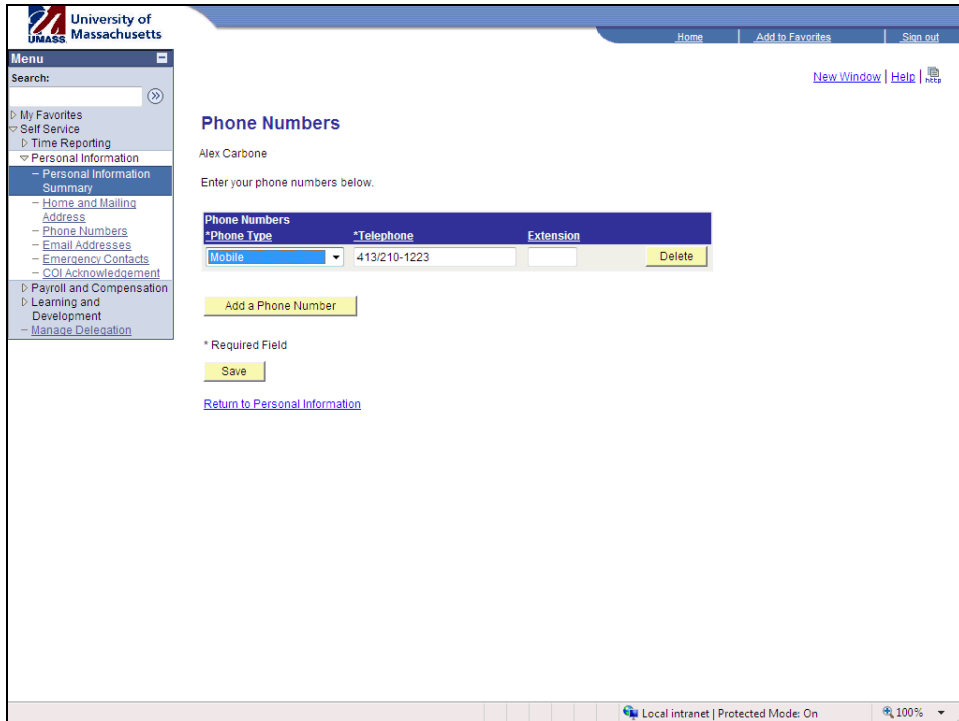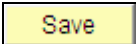
Step	Action
22.	Click the **Delete** button.

Step	Action
23.	Click the **Yes - Delete** button. Yes - Delete

Step	Action
24.	Click the **Save** button. Save
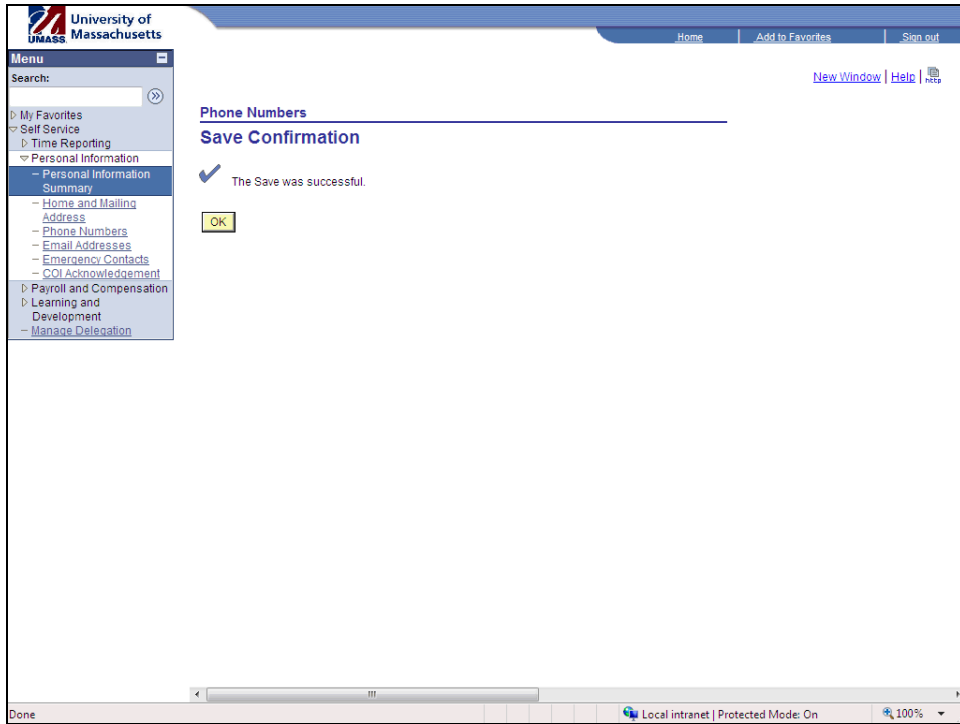
Step	Action
25.	Click the **OK** button.
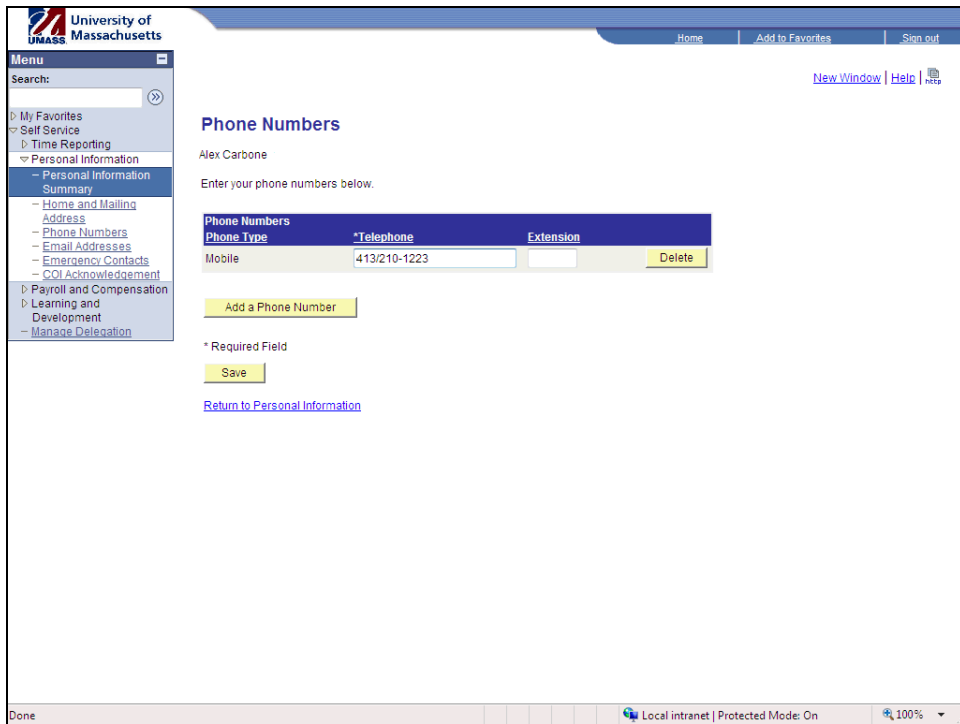
Step	Action
26.	Click the **Return to Personal Information** link. Return to Personal Information

Step	Action
27.	Click the **Change emergency contacts** button. Change emergency contacts

Step	Action
28.	Use the **Emergency Contacts** page to verify and edit your emergency contacts.

Step	Action
29.	Click the **Edit** button. Edit

Step	Action
30.	Add your **Emergency Contact's** address. Click the **Edit Address** link. Edit Address

Step	Action
31.	The address displays on the **Edit Address** page. Use the **QuickAddress** button to update and validate the address.

Step	Action
32.	Click the **QuickAddress** button. QuickAddress

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

Step	Action
38.	In the case where an exact match is not found, the **QuickAddress Address Selection** page appears. This page displays the top matches for the address you entered.
39.	What scenarios would cause the **QuickAddress Address Selection** 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 unoffical address
40.	*Note:* When entering a new or unofficial address (e.g., a new apartment building), you can click the **Cancel** button. The **Edit Address** page will open. You can then click the **Override** link under the **QuickAddress** 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 **9 Granby Rd, Northampton MA, 01060-5407** link. 9 Granby Rd, Northampton MA, 01060-5407
42.	The address has been validated and is grayed out. If you need to make any changes to the address, you can click the **QuickAddress** button

Step	Action
43.	Click the **OK** button. OK

Step	Action
44.	Click the **Scrollbar**.
45.	Click the **Return to Emergency Contacts** link. Return to Emergency Contacts
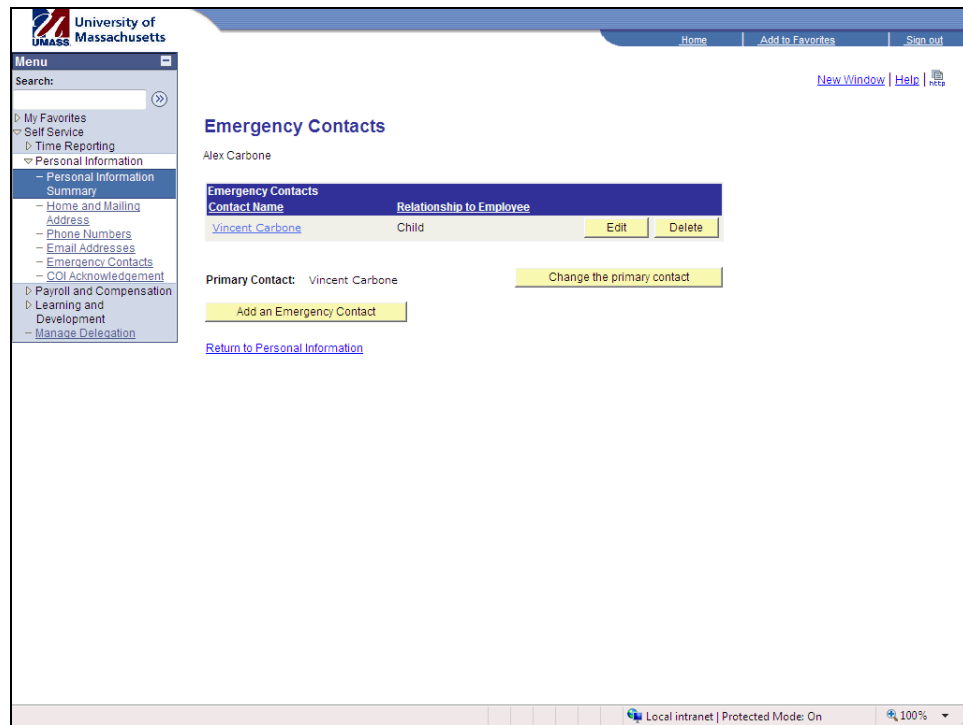
Step	Action
46.	Click the **Return to Personal Information** link. Return to Personal Information

Step	Action
47.	Click **Scrollbar**.

Step	Action
48.	Click the **Change email addresses** button. Change email addresses

Step	Action
49.	Use the **Email Addresses** page to verify and edit your Email addresses.

Step	Action
50.	Click the **Return to Personal Information** link.

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

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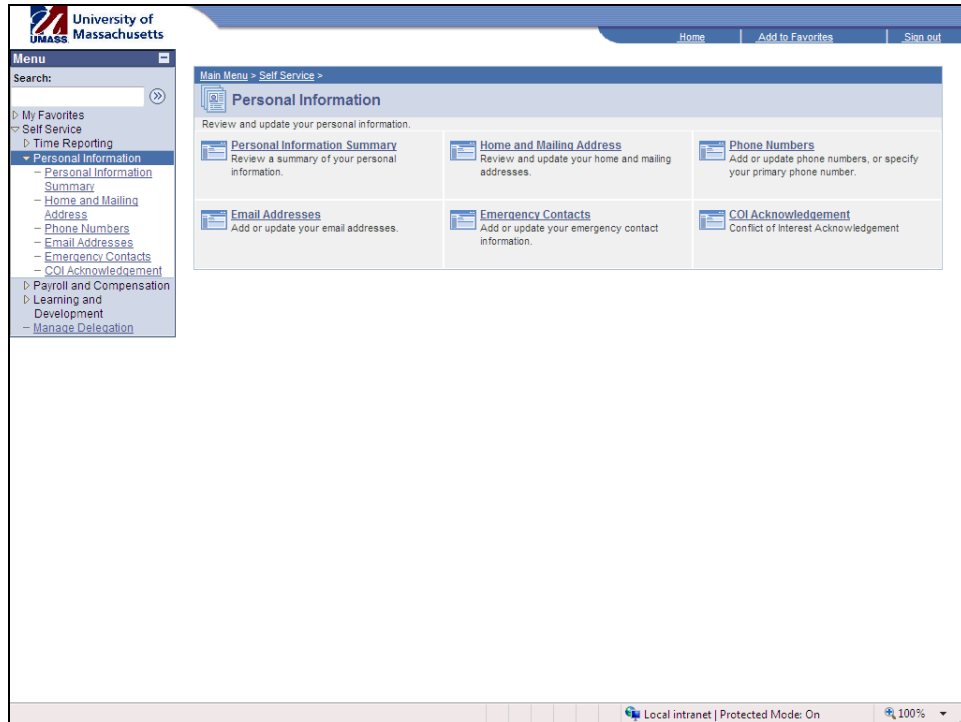
Step	Action
55.	*Note:* The navigation links on the **Personal Information** page provide links to each of the individual sections that the employee can review and edit that are also available on the **Personal Information Summary** page.
56.	Congratulations! You have successfully viewed the Personal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