Create a Personal Data Change

Active LSUNO employees with access to **Self Service** will now be able to make **Personal Data Changes** electronically. *A department designee* will also be able to *initiate personal data changes* if *requested* by the *employee*. The following changes may be initiated:

- Primary/Legal Name
- Marital Status
- Phone/Email (including work phone number)
- Home Address: Yes for LSUNO; No for LSUHS
- Mailing Address: Yes for LSUHS; No for LSUNO
- 1. From the **My PeopleSoft Home** page, click the **Self Service** tile.

| WEB2 │ ③ ♥ ⑦ Soft Home ∽ | | | : | Notifications | | . @ |
|-----------------------------|----------------------|--------------|---|--|----------------------------|------|
| ¢ζ | uncements | Web Clock | | _ | | |
| Sett Service | Manager Self Service | LSUHSC Forms | | No notifi When new notificat Refresh button will | cations ons arrive, the | o "O |

2. Click the drop-down arrow for the My Forms option.



3. The **My Forms** function has five (5) tasks from which the user can select. Users may select one or more of the options listed in **My Forms**. Begin by clicking the **Information** option.

| | ← © ♥ Self Service | Self Service | |
|----------------------|-----------------------------------|----------------------|---|
| 🛼 My Forms 🔷 ^ | 💻 Payroll Info 🗸 🗸 | ≝ Benefits ∨ | To start a new form, select from the following available forms: |
| Information | 🦻 Personal Info 🗸 🗸 | 💻 Payroll Info 🛛 🗸 | Personal Data Change Request changes your personal data information. • Legal Name |
| Personal Data Change | My Forms ^ | ්/ Personal Info 🗸 🗸 | Marital Status Home Address Mail Address (if applicable) |
| Approve My Form | Personal Data Change | 🛼 My Forms 🔨 | Phone/Email Absence Request Request an absence |
| Update My Form | Approve My Form Update My Form | Information | Update My Form lets you make changes to a form and resubmit. |
| View My Form | View My Form | Personal Data Change | View My Form lets you view existing forms. |

The **Information** option conveys to the user which task to select in order to *start a new form* (*Personal Data Change*), *view an existing form* (*View My Form*), and/or *make changes to an existing form* (*Update My Form*) for resubmission. Users may <u>not</u> select tasks from **Information** panel.

4. Click the **Personal Data Change** option to start a <u>new</u> form.

| 🗒 My Forms 🔨 | When the new form displays, across the top you will see: |
|----------------------|---|
| Information | • On the upper left side, the form name ; |
| Personal Data Change | • On the upper right side, the form number assigned by |
| Approve My Form | the system with a status of NEW ; and |
| Update My Form | • Additional instructions to the user regarding the form. |
| View My Form | |

| Self Service | |
|-----------------------------------|---|
| John Doel Training Facilitator | |
| *≜ Benefits | Form ID 33564 (NEW) |
| Payroll Info | LSU Health |
| ්/ Personal Info | Please use form below to notify Human Resources of any personal data changes. Any fields that appear in RED are invalid values based on previous selections or defaulting data that is not valid for this form. These values will need to be |
| 🛼 My Forms | changed before the form is submitted. |
| Information | Personal Data Change Option(s) Select one or more options available below for personal data changes. |
| Personal Data Change | Primary Name Home Address |
| Approve My Form | Marital Status Mailing Address No |
| Update My Form | Phone/Email |
| View My Form | Effective Date for Personal Data Changes |
| | Change As Of 02/14/2025 |
| | Reason |
| | File Attachments |

5. Users indicate a field will be changed by clicking the *checkbox* to the right of the task option. When an item is *checked*, an *additional section will open* for the necessary changes to be added.

Click the **Primary Name** and **Marital Status** options.

| Personal Data Change Option(s) | |
|---|--------------------|
| Select one or more options available below for personal | data changes. |
| Primary Name | Home Address |
| Marital Status | Mailing Address No |
| Phone/Email | |

NOTE: LSUNO and LSUHS allow different types of addresses to be changed on the Personal Data Change form. <u>LSUNO</u> allows the <u>Home Address</u> to be changed, but the Mailing Address cannot be changed. <u>LSUHS</u> allows the <u>Mailing Address</u> to be changed, but the Home Address cannot be changed.

6. *Change As Of* date defaults to the *current date* and is *display only*. You may enter a reason for the change into the **Reason** field.

| Enter " | Got marrie | and changed | l mv name to | Jane Doe Smith." |
|---------|------------|---------------|---------------|------------------|
| Lincer | Got mai ne | a una changet | i my manie vo | |

| Personal Data Change | e Option(s) | | |
|---------------------------|---|-----------------|----|
| Select one or more option | ns available below for personal data changes. | | |
| Primary Name | | Home Address | |
| Marital Status | | Mailing Address | No |
| Phone/Email | | | |
| Effective Date for Per | sonal Data Changes | | |
| Change As Of | 02/14/2025 | | |
| Reason | | | |

7. When making changes to a **Primary Name**, the name entered **<u>must</u>** match <u>**exactly**</u> to what is indicated on the person's *Social Security Card*. Thus, a copy of the *new Social Security Card* is **required** for name changes.

Enter "Jane D Smith" for the new Primary Name.

| Effective Date for Per | sonal Data Changes | | | | |
|--|--|--------|---|-------|--|
| Change As Of Reason | 02/14/2025 Got married and changed my name to Jane Dor Smith | 8 | | | Enter for Primary Name: |
| Name Changes The name entered must r must be attached to this f Current Name John I | | | nly documentation that will be accepted | l and | First Name: Jane Middle Name: Doe Last Name: Smith |
| *First Name | | Prefix | ~ | | Prefix: Mrs. |
| Middle Name | | | | | |
| *Last Name | | Suffix | ~ | | |

8. Click the *drop-down button* for **Marital Status** and select **Married**.

Enter 12/30/2024 for Marital Date.

| Name Changes | | | | |
|---|--------|--|-------------------------------|--------------------------|
| The name entered must n must be attached to this f | | d on your Social Security card. Social Security card | d is the only documentation t | hat will be accepted and |
| Current Name John | Doe | | | |
| *First Name | Jane | Prefix | Mrs 🗸 | |
| Middle Name | Doe |] | | |
| *Last Name | Smith | Suffix | ~ | |
| Marital Status Change | 9 | | | |
| Current Marital Status | Single | | | |
| *Marital Status | ~ | Marital Status Date | | |
| | | | | |

9. If a copy of a Social Security Card is <u>not</u> submitted for the name change, a warning message will appear and you will <u>not</u> be able to submit the data change:

| Fil | An attachmer | nt with the des | scription Social Security | r Card is required for | this form. (248 | 342,41) I row |
|-----|--------------|-----------------|---------------------------|--|-----------------|------------------|
| | Required | Upload | Description ◇ | Instructions ◇ | Name ⇔ | Delete |
| 1 | 0 | Upload | Social Security Card | A name change requires that an updated Social Security Card is attached. | | Delete |

To <u>add</u> a <u>new</u> Social Security Card, click **Upload**



Choose From My Device,

| | File Attachment |
|-------------|-----------------|
| Choose From | |
| My Device | |

Select desired **File**. Select **socSEC_WEB.pdf**.

Click Open

| File name: | socSEC_WEB ~ | · | All Files | ~ | |
|------------|--------------|---|-----------|--------|--|
| | | | Open | Cancel | |

Click Upload



When the upload completes, click *Done*.

| File Attachment | Done |
|---|-----------------|
| Choose From | |
| My Device SocSec_WEB.pdf File Size: 700KB | |
| L | Upload Complete |

10. A green check mark under 'Attachment Uploaded' will appear,

Click *Submit*.



11. A confirmation message displays stating your form has been **submitted** and routed to the next step for approval.

| Self Service | | | | | | | | | |
|----------------------------------|--|--------------------------|--|--|--|--|--|--|--|
| John Doe Training Facilitator | | | | | | | | | |
| 🐏 Benefits 🗸 🗸 | Request : Result | Form ID 33564 (Pending) | | | | | | | |
| 📑 Payroll Info 🗸 🗸 | You have successfully submitted your eForm. | | | | | | | | |
| ්/ Personal Info ~ | The eForm has been routed to the next approval step. | | | | | | | | |
| 🛼 My Forms 🔷 | View Approval Route | | | | | | | | |
| Information | Transaction / Signature Log 1 row | | | | | | | | |
| Personal Data Change | Current Date Time Step Title User ID Description | Form Action Time Elapsed | | | | | | | |
| Approve My Form | 1 02/14/2025 3:49:58PM Initiated | Submit | | | | | | | |
| Update My Form | Refresh Log | | | | | | | | |
| View My Form | | | | | | | | | |

12. *All forms* are routed to the *Office of Human Resource Management* for *review/approval*. If you have any questions, you can email <u>nohrm@lsuhsc.edu</u>.

Additional Information

Address Changes Information

The system will automatically check the address entered for validity when you have completed data entry and clicked the Submit button. An **invalid address** will produce an **error message** stating the address could not be verified.

Address suggestions and a '**Skip Verification**' button will display below the Postal field if the invalid address message is received. If you are certain the address entered is correct, click the toggle for the Skip Verification button to turn display from '**No**' to '**Yes**'.

NOTE: If the Mailing Address currently exists for the specified employee, it will automatically sync with the Home Address when changes are saved.

NOTE: When an International address is entered, it does <u>NOT</u> trigger Address Verification so it will be used as entered.

Phone Number Changes Information

Phone numbers are auto formatted and require validation similar to Address validation. If the phone number is **incorrect**, you will receive an error message after clicking **Submit**.

Workflow Processing

NOTE: You can only have one change request in the queue at a time. A new change request cannot be added until the original form is approved. You can, however, update the original form prior to the form being approved.

The system will prevent you from adding a personal data change if a pending request exists. You will receive a message asking if you wish to update the existing request or wait for the existing form to be approved.

An email will be sent to the user stating the data change has been successfully submitted. An email will also be sent to Human Resources for approval.

Once changes are approved by Human Resources, the system will automatically route the changes to Benefits so appropriate changes can be made.

NOTE: The form is not tied to Payroll or Tax Filing Status. The system will not route data change information for these functions.