CHARTER SCHOOL PEOPLESOFT TRAINING MANUAL

Palm Beach County School District—HRIM Team

Updating Personal Information

When to Update Personal Information

The Employee's Personal Information screens are created or updated by PBC District personnel as part of the Charter School New Hire Process. When changes need to be made after the employee has been hired, it is the responsibility of the PeopleSoft designee at the School Site to make the changes. Some examples of changes that can be made to an existing employee's personal information are:

- Name changes (marriage, etc.) NOTE: You will need to see a Social Security card showing the new name before changing the name in PeopleSoft.
- Addition of a college degree (Bachelor's, Master's, etc.)
- Address changes
- Phone number changes
- Addition of a contact email address, if desired

Listed below, is a sample of the information found on each tab.

Biographical Details tab
1) Name
2) Date of Birth
3) Gender
4) Education Level
5) Marital Status (The District does not enter this information. It can be updated, if needed)
6) National ID information

Contact Information tab
1) Address
2) Phone numbers
3) Email address

Regional tab
1) Hispanic or Latino indicator
2) Ethnic Group/Primary indicator

How to Update/Change Employee Personal Information

1. In PeopleSoft, click on the **Human Capital Management** tile.

2. In the next window, click on the **NavBar** icon to bring up the
   NavBar menu, then
   A. Click on the **Navigator** icon to bring up the **Navigator Menu**.
   B. Click on **Workforce Administration**
   C. Click on **Personal Information**
   D. Click on **Modify a Person**
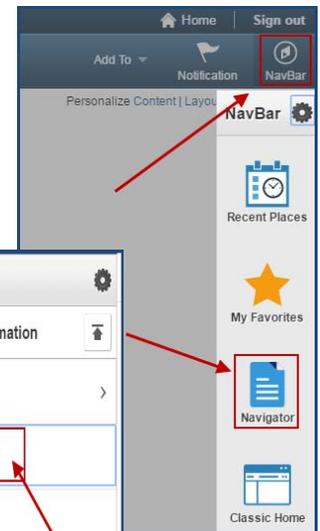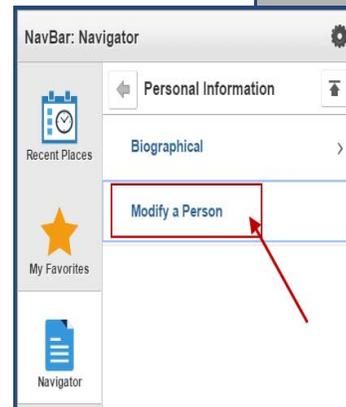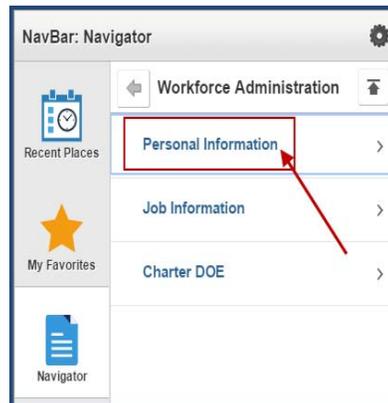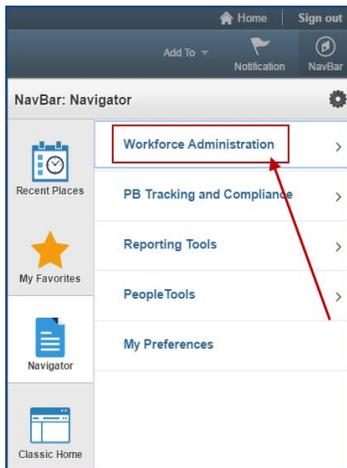
The Personal Information search screen will display.

3. There are three (3) ways to search for an employee:
   A. Enter the **Employee ID** in the EMPL ID field, or
   B. Enter the **last name, first** in the Name field, or
   C. Enter the **last name**, only, in the Last Name field.

4. Click the **Include History** box.

5. Click the **Search** button.

*The **Biographical Details** tab displays the employee's name, employee ID number, date of birth, gender and highest education level.*

*The **Contact Information** tab displays the employee's address, telephone and email address.*

Name and **Education** changes can be made on the **Biographical Details** tab.

Name Change:

In the **Name** section:
1. Click on the **plus sign** button to add a new row.
2. Enter the **Effective Date**.
3. Click the **Edit Name** button and type the name.
4. Click the **Save** button.

| Biographical Details | PB Biographical Details | Contact Information | Regional | PBC Public Records Exemption |

Teacher, Tommy.   Person ID: 1234567

Name   Find | View All First 1 of 2 Last

*Effective Date:	02/10/2014	←	+ −
*Format Type:	English
Display Name:	Tommy, Teacher	Edit Name

Education Change:

In the **Biographical History** section:
1. Click on the **plus sign** button to add a new row.
2. Enter the **Effective Date**.
3. Click the **Highest Education Level** drop down arrow and select education level.
4. Click the **Save** button.

Biographical History   Find | View All First 1 of 4 Last

*Effective Date:	07/17/2013	←	+ −
*Gender:	Male
*Highest Education Level:	G-Bachelor's Level Degree	←

To make address changes, click on the **Contact Information** tab:

Address Change:
Under the **Contact Information** tab, in the **Current Addresses** section:
1. Click on **View Address Detail**.
2. Click the **plus sign** (**+**) button.
3. Click on the **add address** link.
4. Enter the new address.
5. Click the **ok** button.
6. Click the **Save** button.