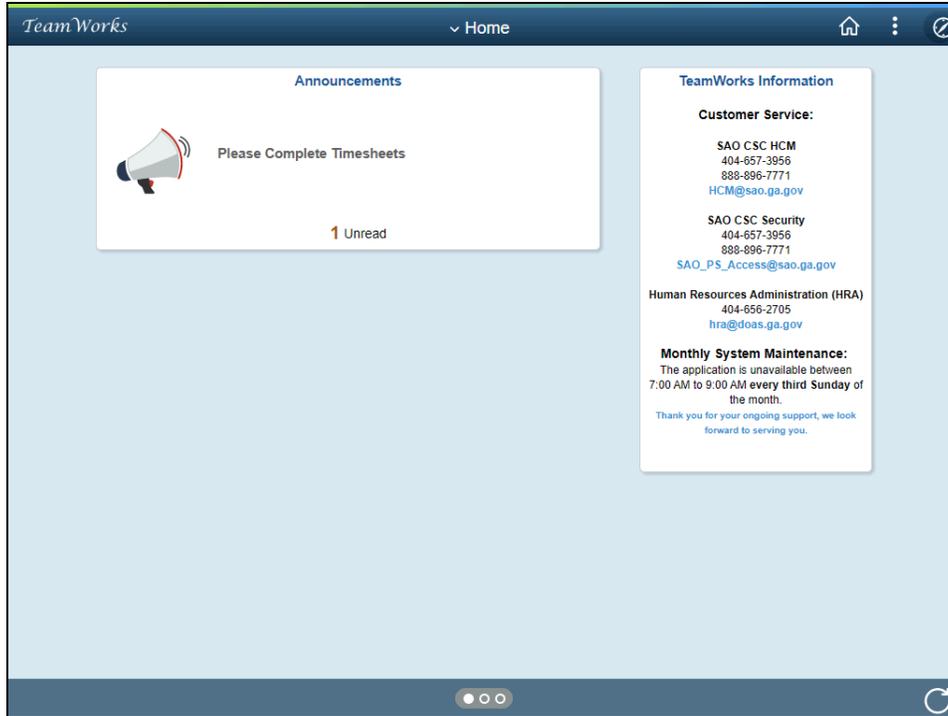## Adding, Updating and Reviewing the Personal Details Page - ESS
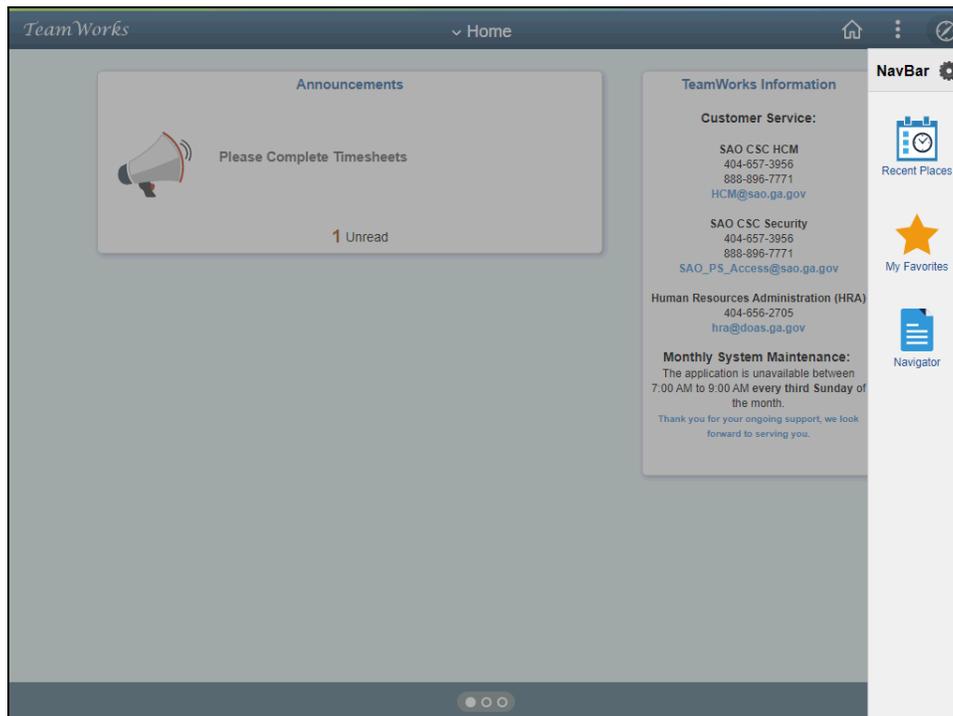

Step	Action
1.	Users have two ways to access the **Personal Details page** in TeamWorks.

Job Aid
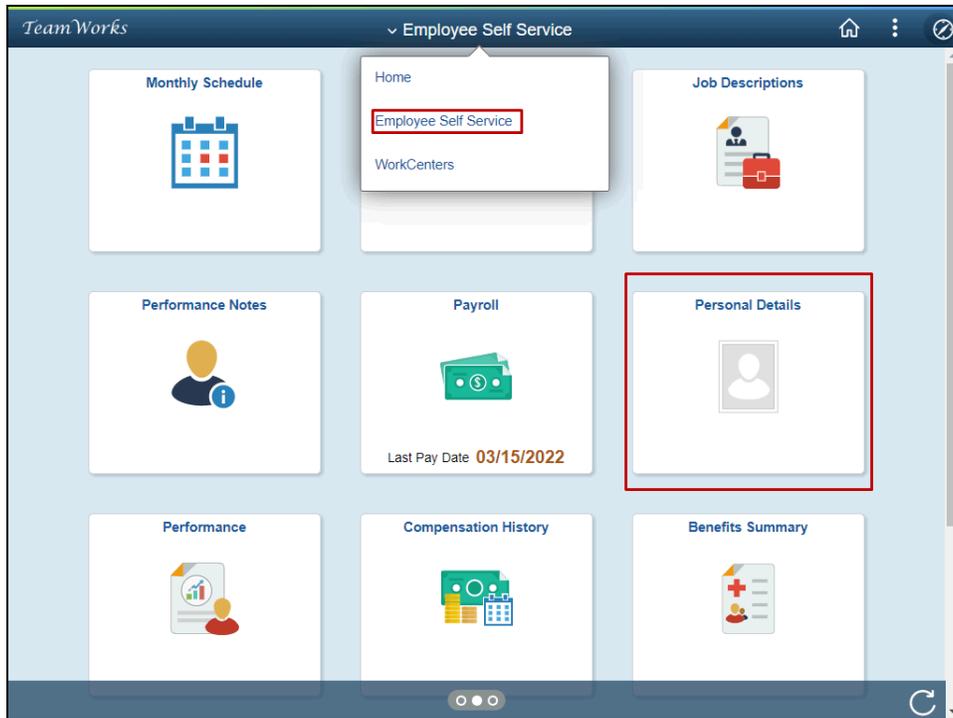
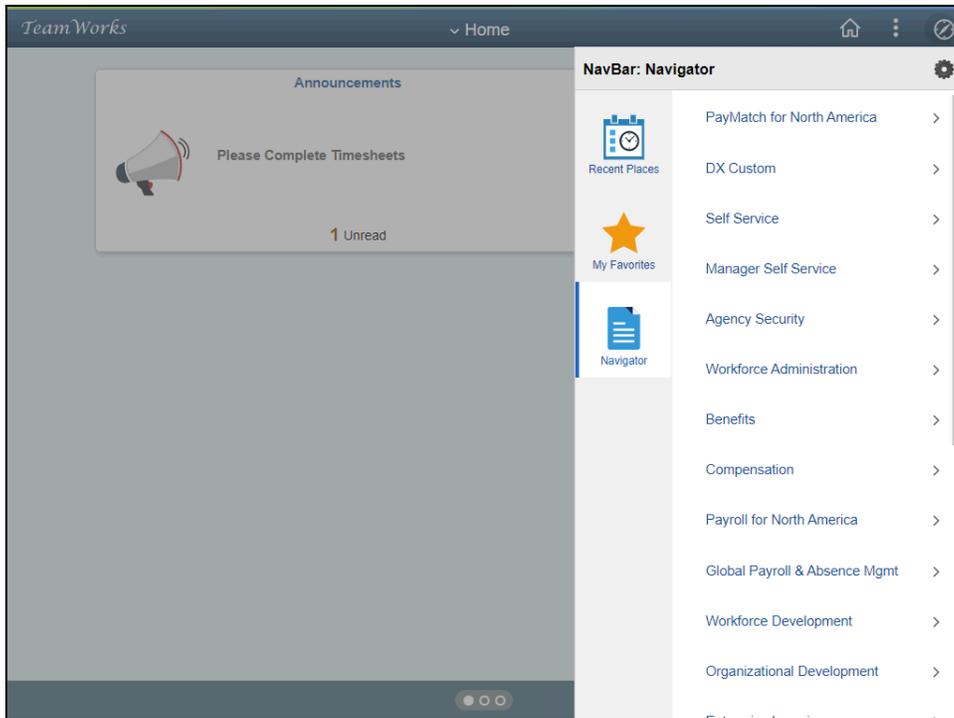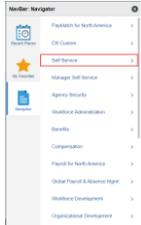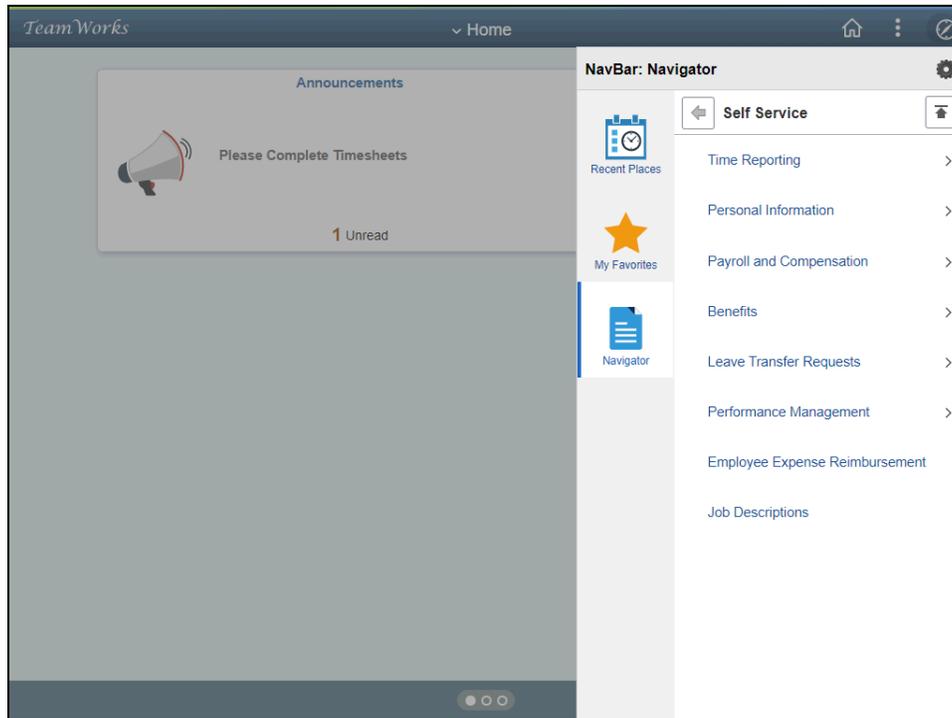| Step	Action
2.	Users can access the **Personal Details** page by first clicking the **Employee Self Service** link found in the drop-down menu on the **Home** page, then by clicking on the **Personal Details** tile.

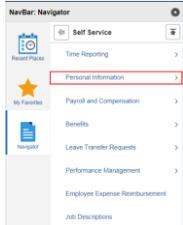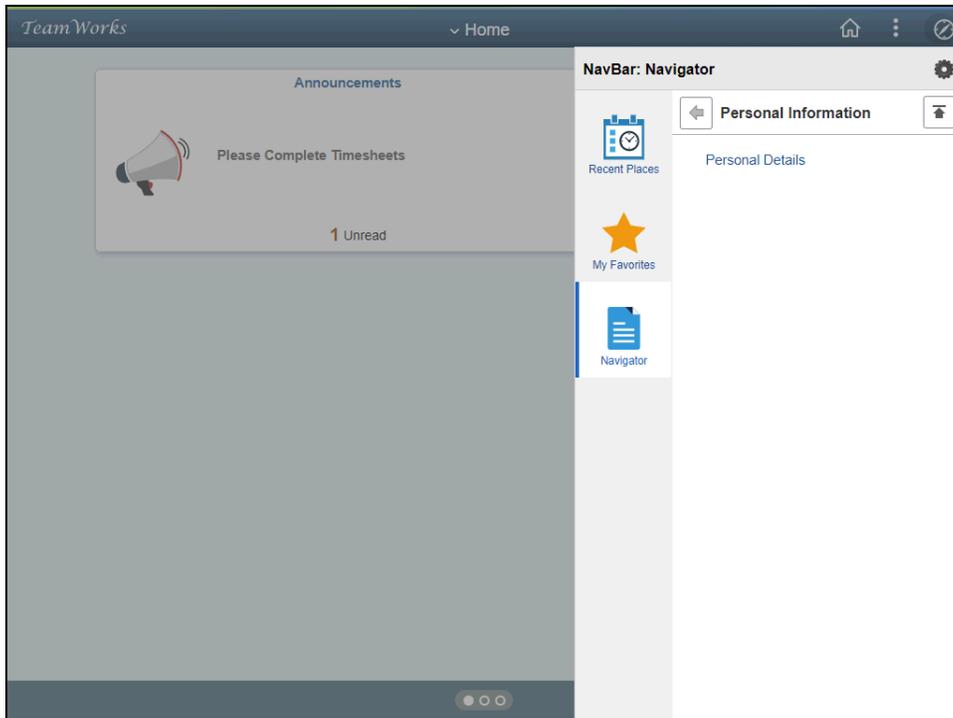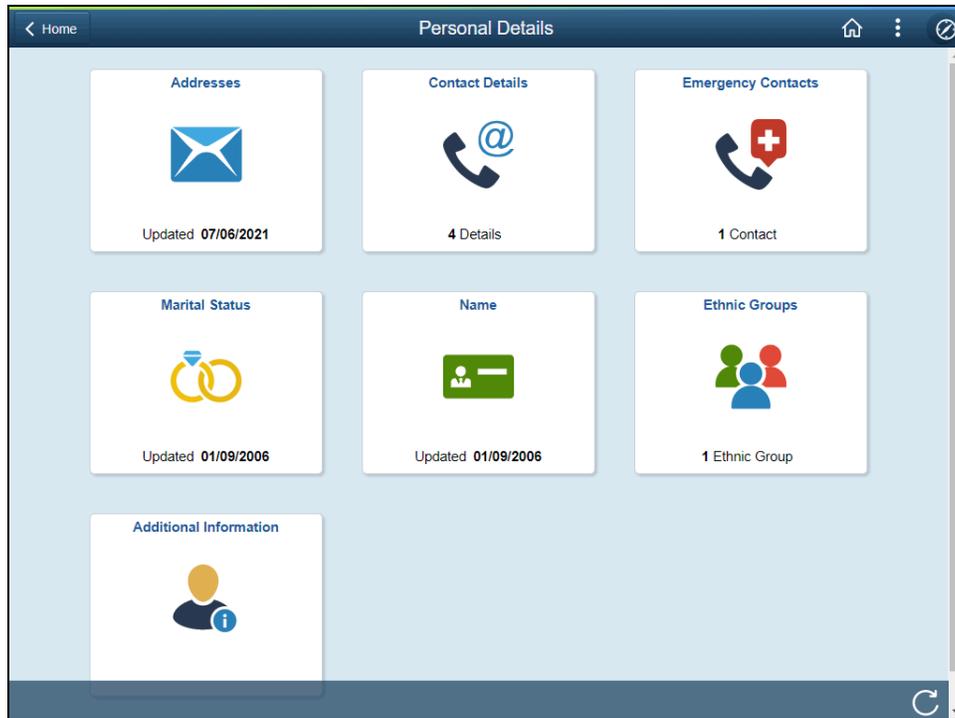| Step	Action
3.	Users can also access the **Personal Details** page by using the **NavBar** located at the top of the page to access the navigation menu. For this example, we will navigate to the **Personal Details** page using the **NavBar**. Begin by clicking on the **NavBar**. **Note:** This simulation is an example of a transaction. When entering a transaction in the live TeamWorks HCM system, please select all values and options based on agency policy, the paperwork on hand and the current situation. Click the **NavBar** button.

Step	Action
4.	Click the **Navigator** link.

Job Aid

Step	Action
5.	Click the **Self Service** link.

Step	Action
6.	Click the **Personal Information** link.

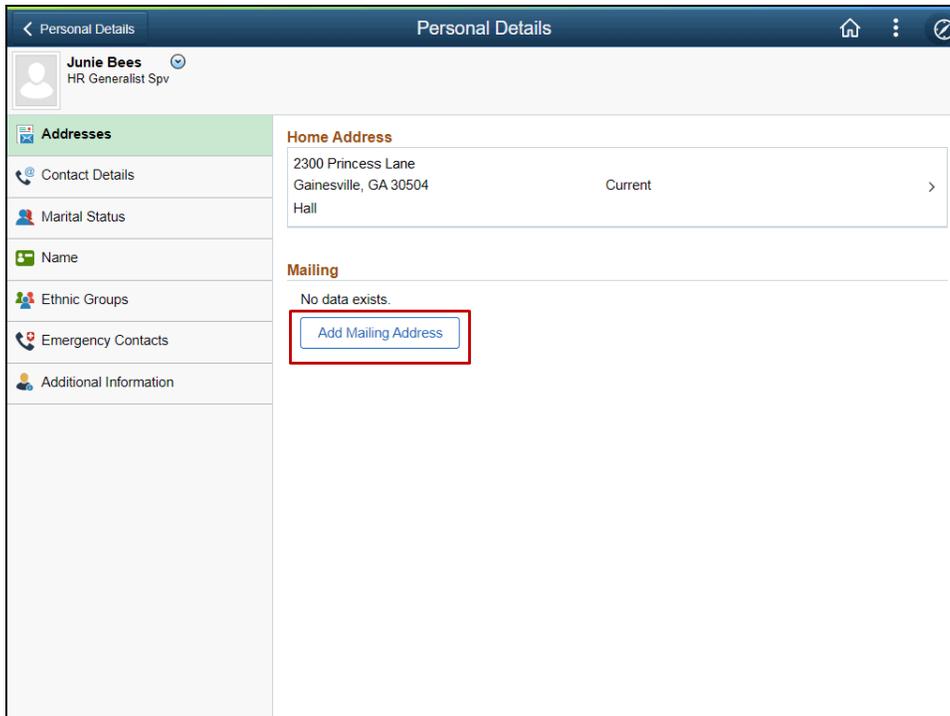| Step	Action
7.	Click the **Personal Details** link.

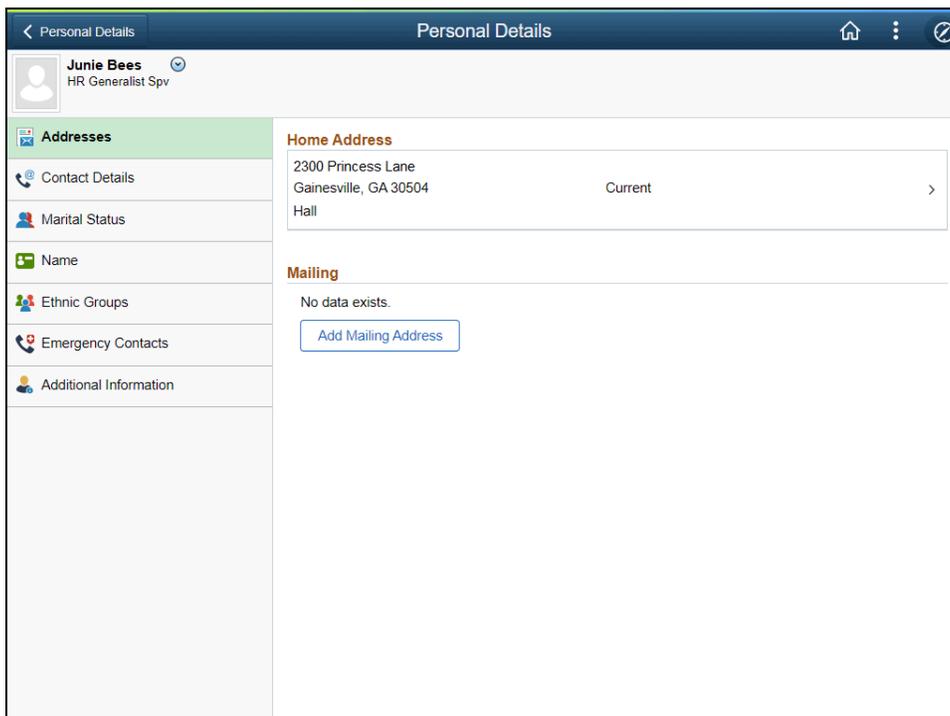| Step	Action
8.	The **Personal Details** page displays. Users can use this page to review current personal data and to access other **Employee Self Service** pages.
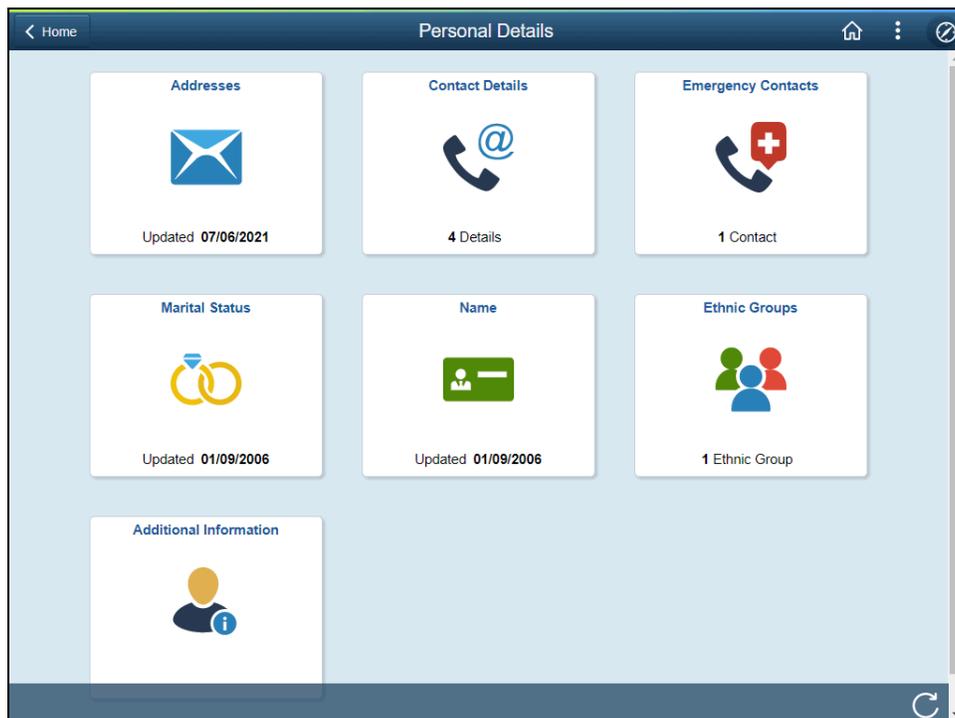
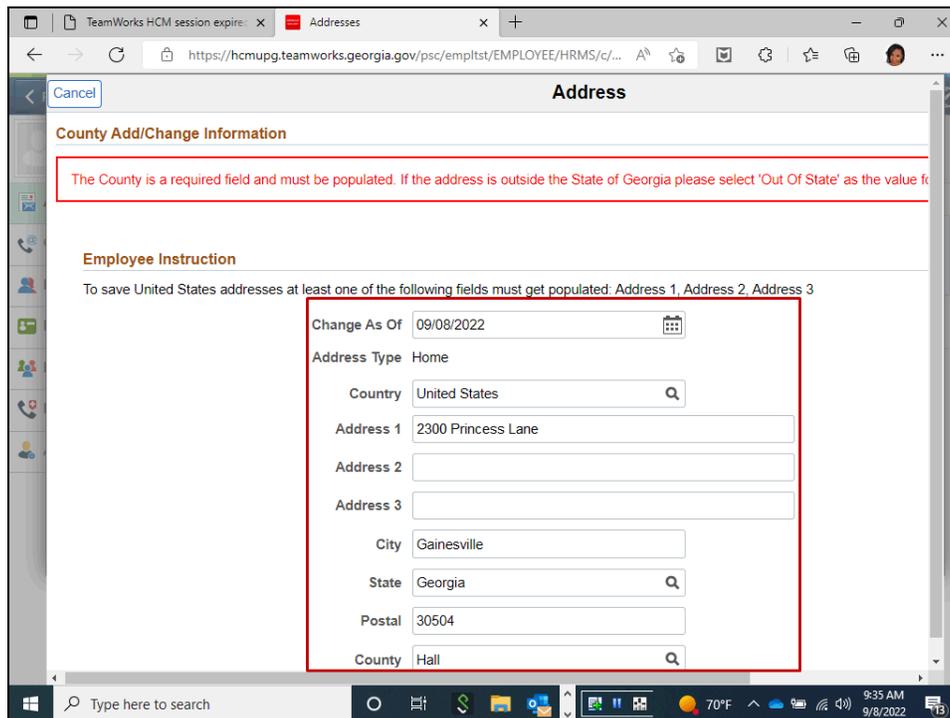| Step	Action
9.	Users can now view or update their address information by clicking on the **Addresses** tile. Click the **Addresses** tile. **Addresses** Updated **07/06/2021**

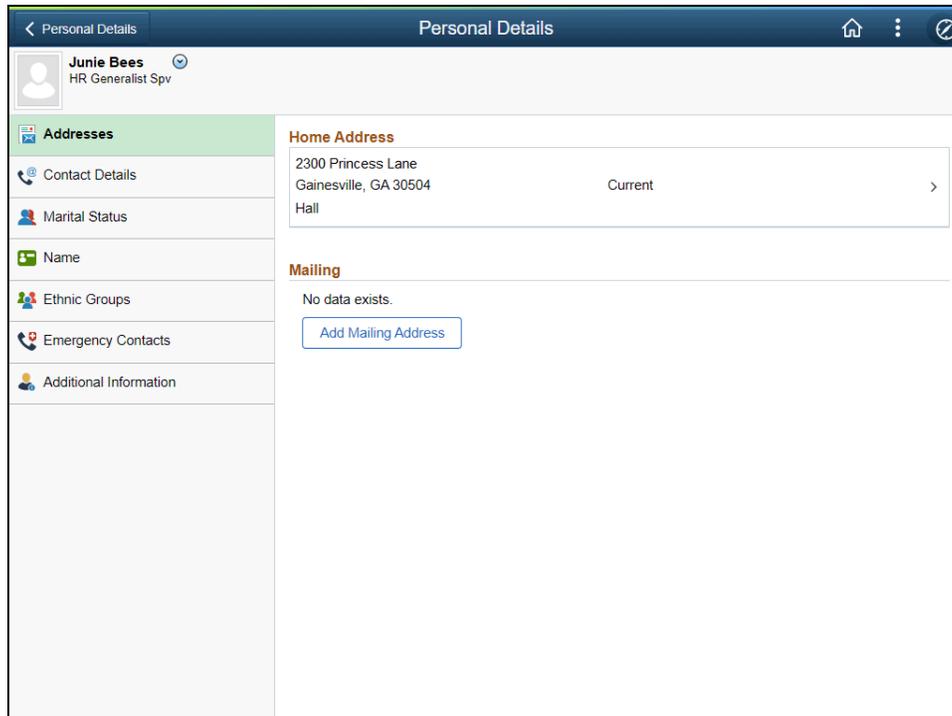| Step	Action
10.	The **Addresses** details page displays with the user's current address information. Users can use this page to edit current home and mailing address information. **Note**: A menu on the left side of the page displays the different categories of personal details that are the same as the tile options located on the **Personal Details** home page.

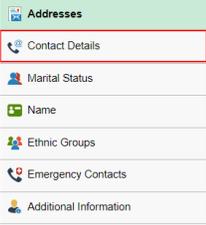| Step	Action
11.	If the **Home Address** is different from their **Mailing** address, the user can click the **Add Mailing Address** button to enter or update their correct mailing address.

Step	Action
12.	Click on the **Home Address** box to update the current address information. Click the **Home Address** button. **Home Address** 2300 Princess Lane Gainesville, GA 30504 Current › Hall
13.	Once on the **Address** page, users can update and save their information.

Step	Action
14.	Click **Cancel** to return to the **Personal Details** page. Click the **Cancel** button. Cancel

Step	Action
15.	The user can choose to view or edit other personal details. Let's view the **Contact Details** section.
	Click the **Contact Details** link.

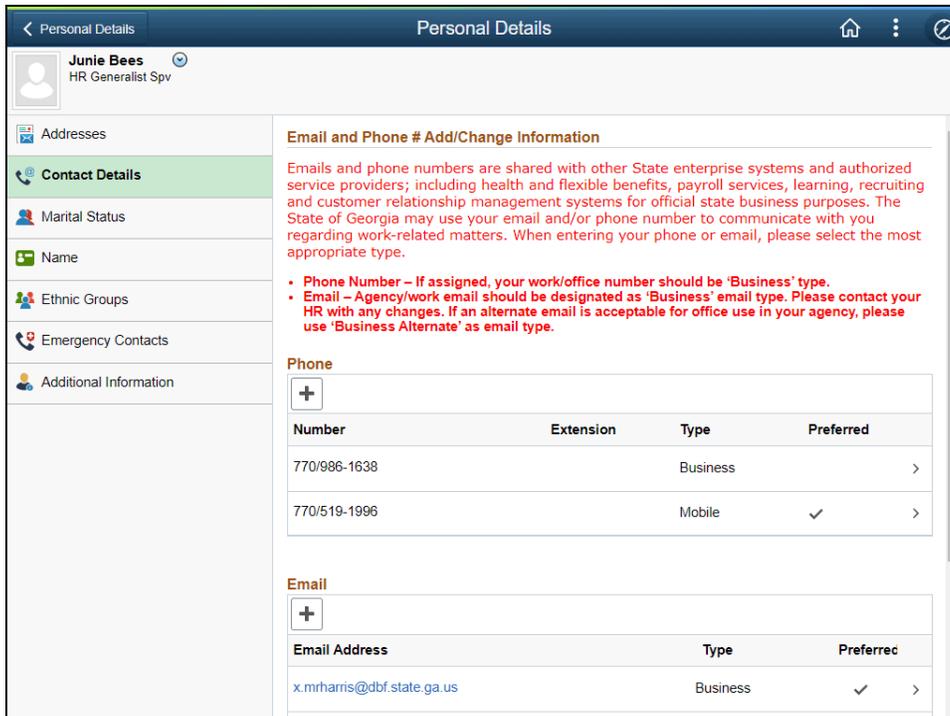| Step	Action
16.	The **Contact Details** page allows the user to edit, delete, or add phone number information. The user can click on any phone number listed to update the current phone number information. For this example, click on the Mobile phone number listed. Click the **Mobile** link.

Step	Action
17.	On this page the user is able to update the **Type** of phone number, check whether this number is the **Preferred** contact, and update the phone number if the employee has a new number.
	If the current phone number is no longer used at all, the user can click the **Delete** button to remove the number from **Contact Details**.
	The user must click the **Save** button to save any changes made to this page.
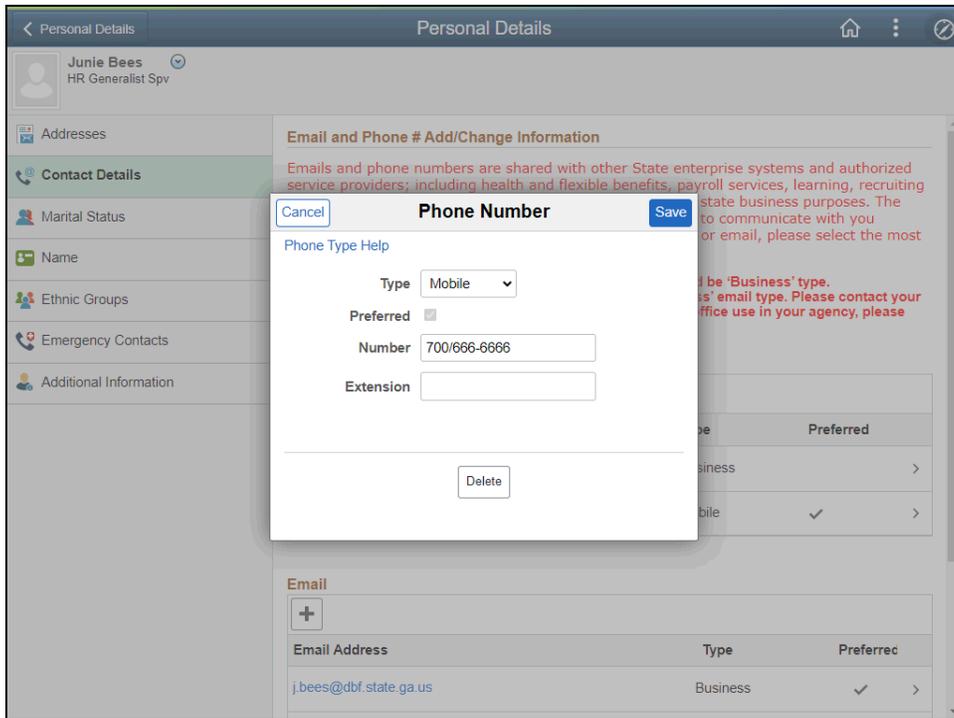
Step	Action
18.	Click **Cancel** to return to the **Personal Details** page. Click the **Cancel** button. Cancel

Step	Action
19.	The user can choose to view or edit other personal details. Let's view the **Ethnic Groups** section. Click the **Ethnic Groups** link.

Step	Action
20.	Use the **Ethnic Groups** page to add any additional ethnic group information. The **"+"** button is used to add an additional row to an employee's **Ethnic Groups**. **Note: Ethnic Groups** is a required field. If only one Ethnic Group listed, it cannot be deleted by the employee. Employees can <u>only</u> add additional ethnicities.
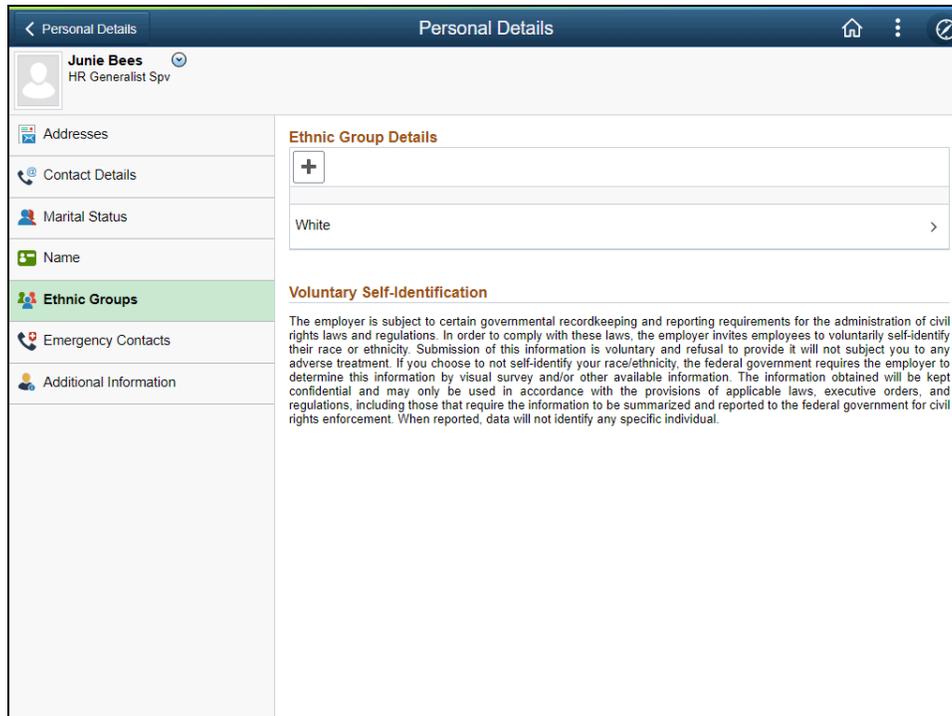
Step	Action
21.	Now, let's view the **Emergency Contacts** section. Click the **Emergency Contacts** link.
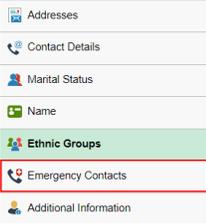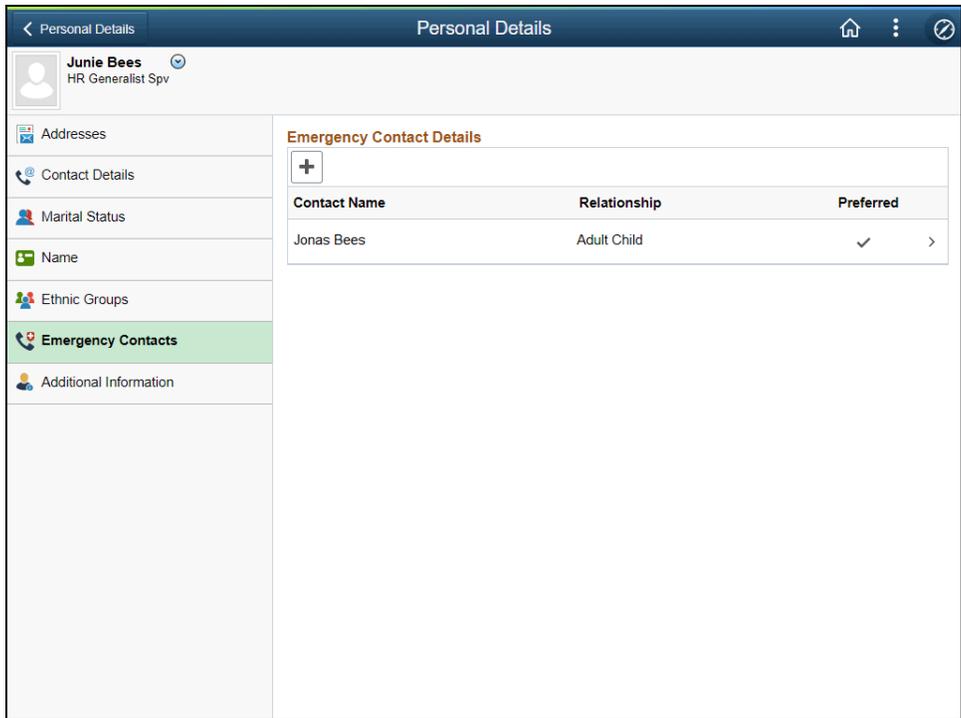
Step	Action
22.	Use the **Emergency Contacts** page to edit, delete, or add emergency contact information. Users can also change the primary contact from this page.

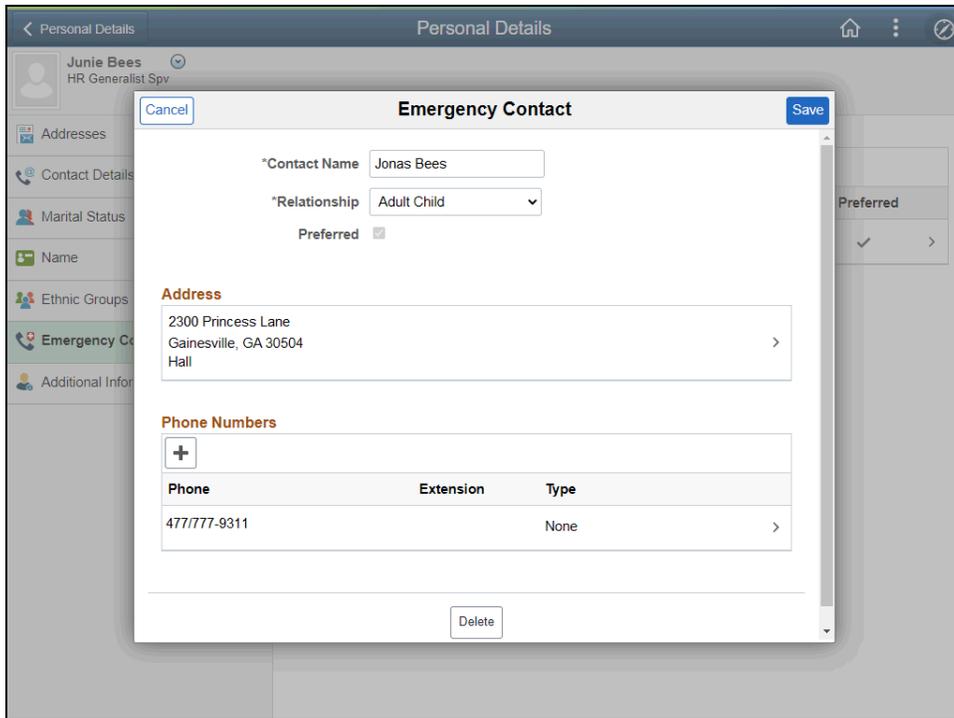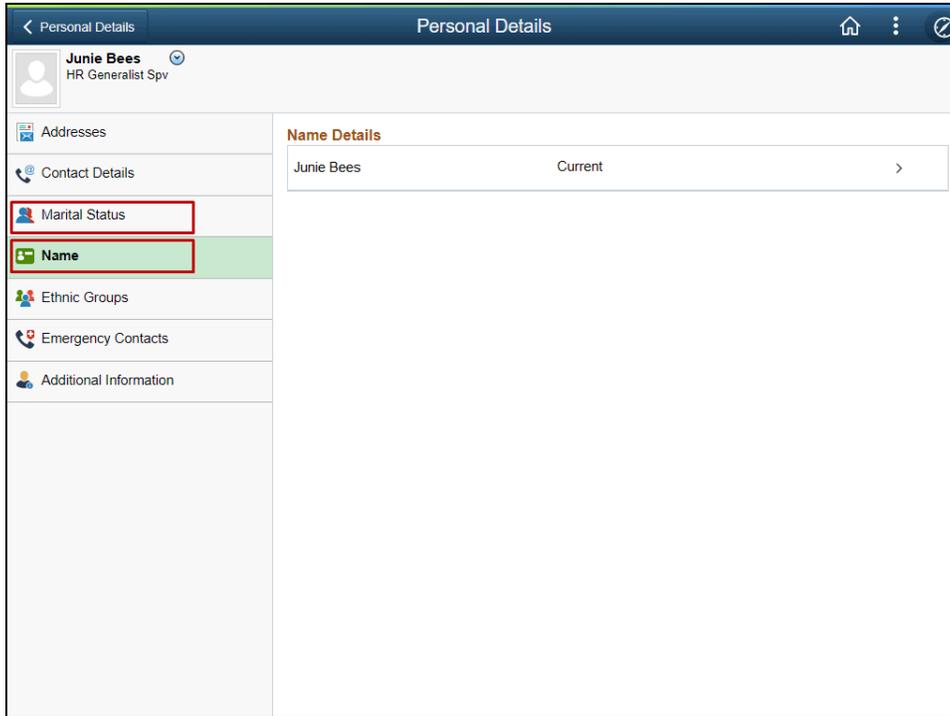| Step	Action
23.	The **Emergency Contact Details** page allows the user to edit, delete, or add emergency contact information. The user can click on any contact listed to update the emergency contact information. For this example, click on the contact **Jonas Bees**. Click the **Jonas Bees** link. | Contact Name	Relationship	Preferred
---	---	---
Jonas Bees	Adult Child	✓ >	

Step	Action
24.	On this page the user is able to update the **Contact Name**, the **relationship**, check whether this contact is the **Preferred** contact, and update the **Address** and **Phone Number** of the emergency contact. If the current contact is no longer accurate, the user can click the **Delete** button to remove the contact from the Emergency **Contact Details**. The user must click the **Save** button to save any changes made to this page.

Step	Action
25.	Click **Cancel** to return to the **Personal Details** page. Click the **Cancel** button. ![Cancel]

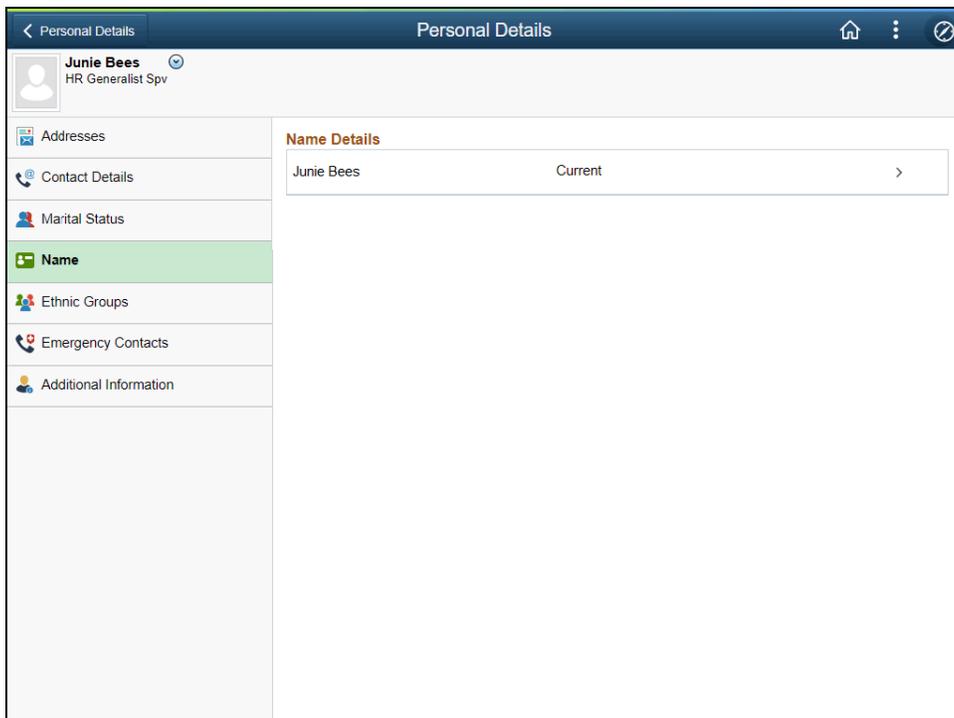| Step	Action
26.	Users cannot update their **Marital Status** or **Name** from the **Personal Information Summary** page at this time. Changes to **Name** and **Marital Status** constitute "life events" that can only be made by your agency's Human Resources Office. Use theses sections to verify that the current information is accurate. If the information is inaccurate, contact your agency's Human Resources Office for assistance.
27.	The last section, **Additional Information** is *view only*. To make changes to the information in this section, contact your agency's Human Resources Office for assistance.
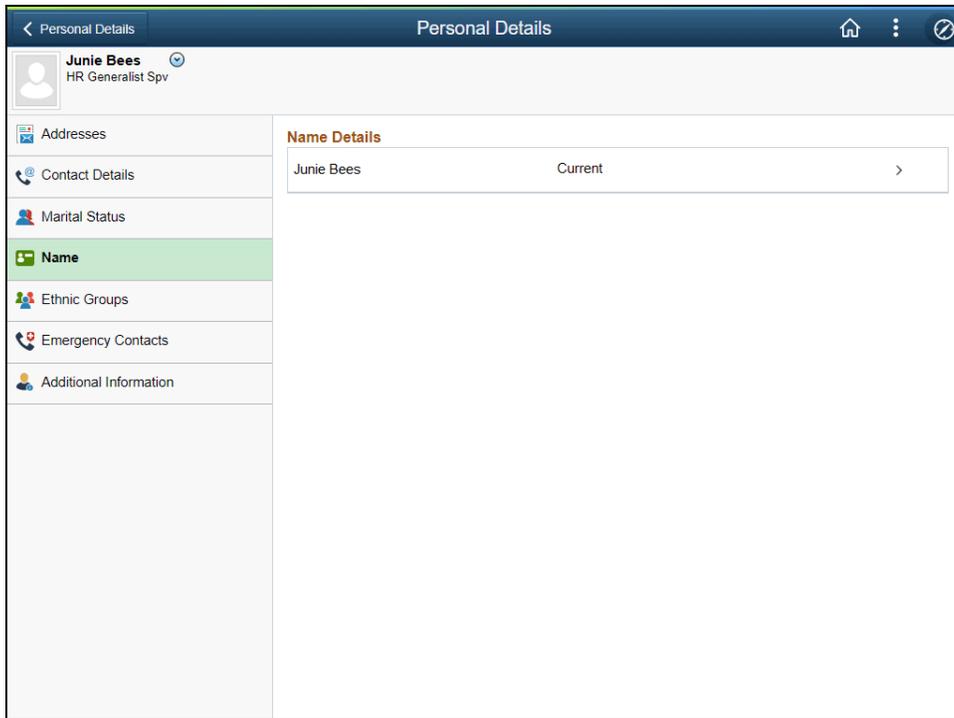
Step	Action
28.	Click **here** (https://www.surveymonkey.com/r/25KG2HH) to take a quick survey.

Step	Action
29.	**Congratulations!** You completed **Reviewing the Personal Information Summary - ESS** page. **End of Procedure.**