





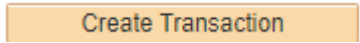
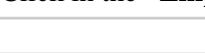
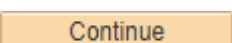
This task provides an overview of how to initiate a personal data POI change template transaction. This template can be used for academic and staff employees.


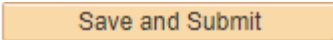

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

or

Workforce Administration (Homepage) > HR Tasks (Tile) > Smart HR Templates > **Smart HR Transactions**

Step	Action
1.	<p>Click the look up Select Template button.</p> <p>Note: The Transaction Type field is not used by UC.</p> 
2.	<p>There is only one personal data POI template. This template is used for academic and staff employees.</p> <p>Click the UC_PERSON_DATA_POI list item.</p> 

Step	Action
3.	<p>The Effective Date field is the effective date of the selected template action. The date you enter in this field automatically populates the Effective Date field on the Enter Transaction Details page.</p> <p>Click in the Effective Date field.</p> 
4.	<p>Select the desired information for the Effective Date</p> <p>Click the Calendar list.</p> 
5.	<p>Click the Create Transaction button.</p> 
6.	<p>In the *Emp ID field, enter the employee's ID number or use the lookup to search for and select it. Access is limited to employee records within your business unit.</p> <p>Click in the *Emp ID field.</p> 
7.	<p>Enter the desired information into the *Empl ID field. For this example, enter 10464864.</p>
8.	<p>The Effective Date is populated based on your entry on the previous page. Ensure that this is the date on which the personal data change begins.</p> <p>If necessary, click the Cancel button to return to the previous page and correct the Effective Date.</p>
9.	<p>The Address Format field defaults to United States. If the employee has an international address, select the Global option.</p> <p>For this example, the Address Format of United States is selected.</p>
10.	<p>Click the Continue button.</p> 
11.	<p>The personal data template appears.</p> <p>The top of the page displays header data, which you can show/hide as needed.</p>

Step	Action
12.	<p>The employee's personal data automatically populates from the employee's existing personal data information. Update the information as needed.</p> <p>Legal Name is a name appearing on an official government-issued document. Lived Name is a self-chosen or personal and/or preferred professional name used instead of a legal name.</p> <p>In UCPath, Legal Name is always labeled as “Legal Name”. Its presentation and use are restricted to protect confidentiality.</p> <p>If no Name is specified, it is populated from the Legal Name.</p> <p>In this example, the employee's Legal Name and Name are populated.</p>
13.	<p>Click in the Date of Birth field.</p> 
14.	<p>Enter the desired information into the Date of Birth field. For this example, enter 01/01/1994.</p>
15.	<p>You can type over the existing data to update it.</p> <p>Click in the Address Line 1 field.</p>
16.	<p>Enter the desired information into the Address Line 1 field. For this example, enter 555 Meridian Prkwy.</p>
17.	<p>Click the scroll bar.</p>
18.	<p>The Personal Phone Number and Person Email Address sections do not display the employee's existing data. However, if you enter new information here, it will update the existing information.</p>
19.	<p>Use the Comments field to enter specific details or an explanation regarding the transaction. This field is referenced by UCPC WFA Production to assist with the processing of the transaction.</p>
20.	<p>Use the Supporting documents link to attach supporting documents for the transaction.</p>
21.	<p>Enter comments for the Approver in the Initiator Comments field.</p> <p>Comments you enter here appear only with the request; they do not display on the employee's record after the transaction is processed to completion.</p>
22.	<p>Click the Save and Submit button.</p> 
23.	<p>Click the OK button.</p> 
24.	<p>The template transaction is routed for approval and appears in the Transactions in Progress section until it is processed.</p>

Step	Action
25.	You have initiated a personal data POI change template transaction. End of Procedure.