

This task provides an overview of how to initiate a personal data 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

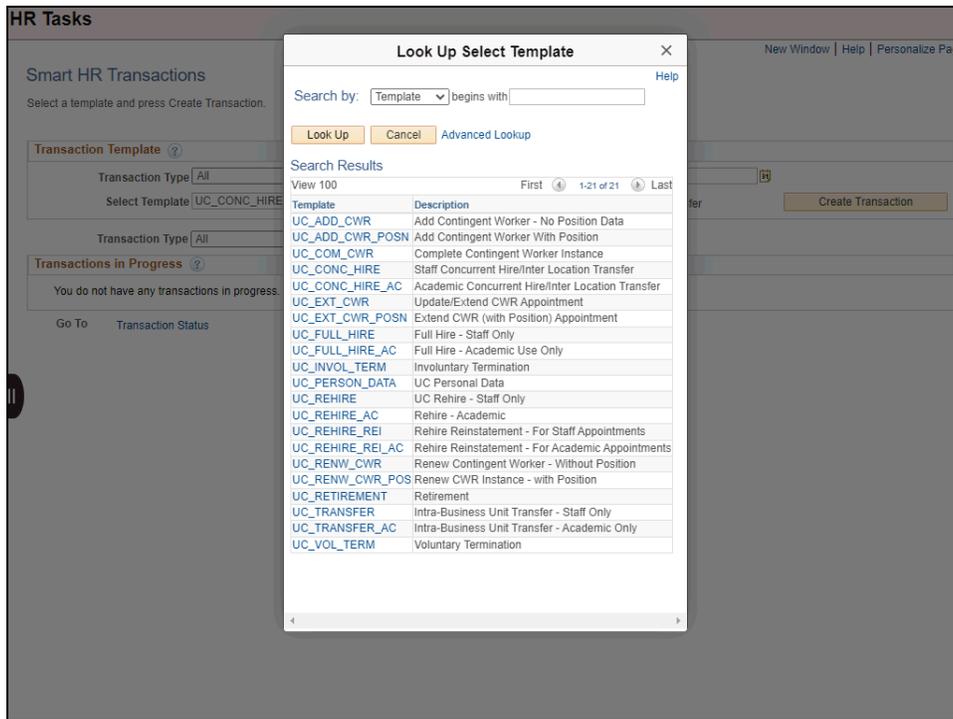
Workforce Administration (Homepage) > HR Tasks (Tile) > Smart HR Templates > **Smart HR Transactions**

Step	Action
1.	Use the <b>Smart HR Transactions</b> page to initiate a personal data change template.

The screenshot shows the 'HR Tasks' page with a sub-section for 'Smart HR Transactions'. Below the heading, there is a prompt: 'Select a template and press Create Transaction.' The form includes a 'Transaction Template' section with a 'Transaction Type' dropdown set to 'All', an 'Effective Date' field, and a 'Select Template' search box with a magnifying glass icon. A 'Create Transaction' button is visible. Below the form is a 'Refresh' button and a table titled 'Transactions in Progress'. The table has columns for 'Select', 'Transaction Type', 'Effective Date', 'Name', 'Person ID', 'Action', and 'Country'. It lists 14 transactions, including transfers and hires for various employees.

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	JOB	11/01/2018	Claire Ramirez	10005571	Transfer	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Cassandra Perry	NEW	Hire	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Gus Gonzalez	NEW	Hire	United States
<input type="checkbox"/>	JOB	09/29/2018	Grisby, Elizabeth N	10000841	Terminatn	United States
<input type="checkbox"/>	HIRE	11/01/2018	Tam Triet Ngo Duc	10008356	Hire	United States
<input type="checkbox"/>	HIRE	11/01/2018	Cheong Yankura	10087236	Hire	United States
<input type="checkbox"/>	HIRE	11/01/2018	Kirstin Bright	10000008	Hire	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Maricar Sherck	10000023	Rehire	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Randy Sacks	10000098	Rehire	United States
<input type="checkbox"/>	HIREJPM	10/01/2018	Anthony Perez	10130745	Rehire	United States
<input type="checkbox"/>	HIREJPM	09/29/2018	Taylor Baker	10130925	Rehire	United States
<input type="checkbox"/>	JOB	11/01/2018	Nitya Perry	10000063	Terminatn	United States

Step	Action
2.	Click the <b>Look up Select Template</b> button.  <b>Note:</b> The <b>Transaction Type</b> field is not used by UC. 



Step	Action
3.	<p>There is only one personal data template. This template is used for academic and staff employees.</p> <p>Click the <b>UC_PERSON_DATA</b> list item.</p> <p><a href="#">UC_PERSON_DATA</a></p>

**HR Tasks**

Smart HR Transactions  
Select a template and press Create Transaction.

**Transaction Template** ?

Transaction Type: All Effective Date:

Select Template: UC\_PERSON\_DATA x|Q UC Personal Data **Create Transaction**

Transaction Type: All Refresh

**Transactions in Progress** Personalize Find 1-18 of 18 First Last

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	JOB	11/01/2018	Claire Ramirez	10005571	Transfer	United States
<input type="checkbox"/>	HIRE.JPM	11/01/2018	Cassandra Perry	NEW	Hire	United States
<input type="checkbox"/>	HIRE.JPM	11/01/2018	Gus Gonzalez	NEW	Hire	United States
<input type="checkbox"/>	JOB	09/29/2018	Grisby, Elizabeth N	10000841	Terminatn	United States
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Step	Action
4.	<p>The <b>Effective Date</b> field is the effective date of the selected template action. The date you enter in this field automatically populates the <b>Effective Date</b> field on the <b>Enter Transaction Details</b> page.</p> <p>Click in the <b>Effective Date</b> field.</p> <input type="text"/>
5.	<p>Enter the desired information into the <b>Effective Date</b> field. For this example, enter <b>11/1/18</b>.</p>
6.	<p>Click the <b>Create Transaction</b> button.</p> <p><b>Create Transaction</b></p>

**HR Tasks**

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Smart HR Transactions

**Enter Transaction Details**

The following transaction details are required.

Template UC Personal Data

Organizational Relationship Employee

Country United States

Category Code UC Personal Data Changes

\*Employee ID

\*Effective Date 11/01/2018

\*Address Format

Step	Action
7.	<p>In the <b>Employee ID</b> 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 <b>Employee ID</b> field.</p> <div style="border: 1px solid black; width: 100px; height: 15px; margin-left: 20px;"></div>
8.	<p>Enter the desired information into the <b>Employee ID</b> field. For this example, enter <b>10020270</b>.</p>
9.	<p>The <b>Effective Date</b> 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 <b>Cancel</b> button to return to the previous page and correct the <b>Effective Date</b>.</p>

**HR Tasks**

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Smart HR Transactions

**Enter Transaction Details**

The following transaction details are required.

**Template** UC Personal Data  
**Organizational Relationship** Employee  
**Country** United States  
**Category Code** UC Personal Data Changes  
**\*Employee ID**    
**\*Effective Date**   
**\*Address Format**

Step	Action
10.	<p>The <b>Address Format</b> field defaults to <b>United States</b>. If the employee has an international address, select the <b>Global</b> option.</p> <p>For this example, the <b>Address Format</b> of <b>United States</b> is selected.</p>
11.	<p>Click the <b>Continue</b> button.</p> <div style="text-align: center; margin-top: 10px;"> <input type="button" value="Continue"/> </div>

**HR Tasks**

Smart HR Transactions

Enter Transaction Information

[Click here to Hide Header Details](#)

**Template:** UC\_PERSON\_DATA      **Name:** Yuyao Gaulitz  
**Effective Date:** 11/01/2018      **Action/Action Reason:**  
**Employee ID:** 10020270      **Employee Record:**

[Return to Enter Transaction Details Page](#)

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**Personal Data**

**Name - Legal Name/Name**

\*Legal First Name | Yuyao      Legal Middle Name |  
\*Legal Last Name | Gaulitz      Legal Suffix |  
First Name | Yuyao      Middle Name |  
Last Name | Gaulitz

**Birthday Information**

Date of Birth | 01/01/1994 |

**Diversity - United States**      Personalize | Find | View All | First 1 of 1 Last

Ethnic Group  
1

**Personal Data - United States**

Military Status |

**Person National ID United States**

\*National ID Type | PR      National ID | 622480551

Step	Action
12.	<p>The personal data template appears.</p> <p>The top of the page displays header data, which you can show/hide as needed.</p>
13.	<p>The employee's personal data automatically populates from the employee's existing personal data information. Update the information as needed.</p> <p><b>Legal Name</b> identifies a person for legal or certain official purposes. In UCPath, <b>Legal Name</b> is always labeled as “<b>Legal Name</b>”. Its presentation and use are restricted to protect confidentiality.</p> <p>The <b>Name</b> field is a self-chosen or personal and/or preferred professional name used instead of a <b>Legal Name</b>.</p> <p>This <b>Name</b> is used for university business and education whenever possible. It is the typical UCPath name field used and presented on pages and reports throughout the system.</p> <p>If no <b>Name</b> is specified, it is populated from the <b>Legal Name</b>.</p> <p>In this example, the employee's date of birth and address is updated.</p>
14.	<p>Click in the <b>Date of Birth</b> field.</p> <p><input type="text" value="01/01/1994"/></p>

Step	Action
15.	You can type over the existing data to update it.  Enter the desired information into the <b>Date of Birth</b> field. For this example, enter <b>1/11/1994</b> .
16.	Click the scroll bar.

The screenshot shows the 'HR Tasks' form with the following sections:

- Address:** \*Address Type: Home (dropdown), Address Line 1: 23499 Lake Vista Drive, Address Line 2: (empty), City: Oakland, State: CA, Postal Code: 94612.
- Person Phone Number:** Personalize | Find | View All | First 1 of 1 Last. Fields include Phone Type (dropdown), Telephone, and Preferred (checkbox).
- Person Email Address:** Personalize | Find | View All | First 1 of 1 Last. Fields include Email Type (dropdown), Email Address, and Preferred (checkbox).
- Person Education Level:** \*Highest Education Level: A.
- Comments:** A large text area for entering details.
- Buttons:** Save and Submit, Save for Later, Cancel, Supporting documents.
- Transaction ID:** NEW
- Initiator Comments:** (empty text area)
- Requester ID:** 10095340, Ima Gudadmin
- Requested:** (empty text area)

Step	Action
17.	Click in the <b>Address Line 1</b> field.  23499 Lake Vista Drive
18.	You can type over the existing data to update it.  Enter the desired information into the <b>Address Line 1</b> field. For this example, enter <b>87778 Juniper Rd</b> .
19.	The <b>Personal Phone Number</b> and <b>Person Email Address</b> sections do not display the employee's existing data. However, if you enter new information here, it will update the existing information.
20.	Use the <b>Comments</b> 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.  Click in the <b>Comments</b> field.

Step	Action
21.	Enter the desired information into the <b>Comments</b> field. For this example, enter <b>Updated DOB and Address..</b>

The screenshot shows the 'HR Tasks' interface. At the top, there are address fields: '\*Address Type' (Home), 'Address Line 1' (87778 Juniper Rd), 'Address Line 2', 'City' (Oakland), 'State' (CA), and 'Postal Code' (94612). Below this are sections for 'Person Phone Number' and 'Person Email Address', each with a table for adding entries. The 'Person Education Level' section has a dropdown for '\*Highest Education Level' (A). The 'Comments' section has a large text area. At the bottom, there are buttons for 'Save and Submit', 'Save for Later', and 'Cancel', along with a 'Supporting documents' link. Transaction details include 'Transaction ID: NEW', 'Initiator Comments' (empty field), 'Requester ID: 10095340', and 'Requester: Ima Gudadmin'.

Step	Action
22.	Use the <b>Supporting documents</b> link to attach supporting documents for the transaction.
23.	Enter comments for the Approver in the <b>Initiator Comments</b> field.  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.
24.	Click the <b>Save and Submit</b> button.  

**HR Tasks**

Smart HR Transactions

**Submit Confirmation**

 The submit was successful. The Human Resources department will review the person's data and update the HR system.

Go to the Transaction Status page to review the status of this person.



Step	Action
25.	Click the <b>OK</b> button. 

**HR Tasks**

Smart HR Transactions

Select a template and press Create Transaction.

Transaction Template 

Transaction Type:  Effective Date:

Select Template:

Transaction Type:

**Transactions in Progress** Personalize | Find |  |  | First 1-19 of 19 Last

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
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Step	Action
26.	The template transaction is routed for approval and appears in the <b>Transactions in Progress</b> section until it is processed.
27.	You have initiated a personal data change template transaction. <b>End of Procedure.</b>