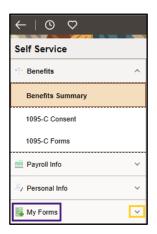
Create a Personal Data Change

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.