



# CHARTER SCHOOL PEOPLESOFT TRAINING MANUAL

---

*Palm Beach County School District—HRIM Team*

## Updating Personal Information

DIVISION OF HUMAN RESOURCES

Compensation and Employee Information Services

3300 Forest Hill Blvd., Suite A-152

West Palm Beach, FL 33406

# 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

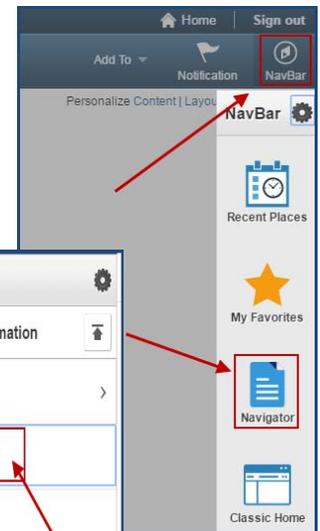
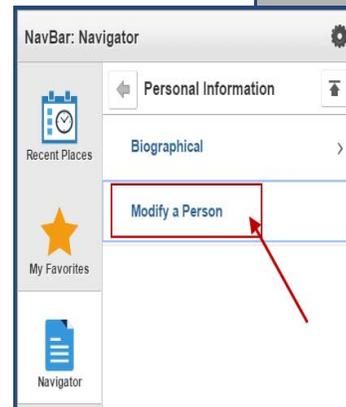
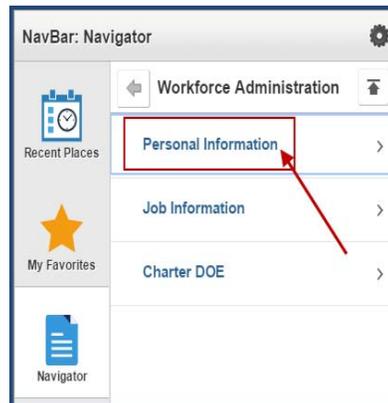
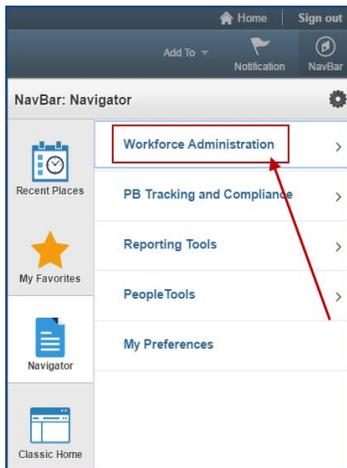
# How to Update/Change Employee Personal Information

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.

**Personal Information**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

Empl ID:	begins with	
Name:	begins with	
Last Name:	begins with	
Second Last Name:	begins with	
Alternate Character Name:	begins with	
Middle Name:	begins with	

Include History  Correct History  Case Sensitive

Search Clear Basic Search Save Search Criteria

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.

The screenshot shows the 'Biographical Details' tab for a person with ID 1234567. The 'Name' section is active, showing a table with one row. The 'Effective Date' is 02/10/2014, and the 'Format Type' is English. The 'Display Name' is Tommy, Teacher. The 'Edit Name' button is highlighted with a red box. Red arrows point to the plus sign button and the 'Effective Date' field.

### 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.

The screenshot shows the 'Biographical History' section. The 'Effective Date' is 07/17/2013, and the 'Gender' is Male. The 'Highest Education Level' is G-Bachelor's Level Degree. The 'Highest Education Level' field is highlighted with a red box. Red arrows point to the plus sign button, the 'Effective Date' field, and the 'Highest Education Level' field.

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.

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

**Teacher, Tommy** Person ID: 1234567

Address Type	As Of Date	Status	Address	
Home	11/04/2008	A	503 Tall Pine Way Loxahatchee, FL 33470	<a href="#">View Address Detail</a> + -

**Address History**

Address Type: Home

Effective Date	Address	
11/04/2008	503 Tall Pine Way Loxahatchee, FL 33470	+ -

Country: USA  
Status: A

OK Cancel Refresh

**Address History**

Address Type: Home

*Effective Date:	09/26/2014	Address:	503 Tall Pine Way Loxahatchee, FL 33470	+ -
Country:	USA			
*Status:	A			

[Add Address](#)

Effective Date:	11/04/2008	Address:	503 Tall Pine Way Loxahatchee, FL 33470	+ -
Country:	USA			
Status:	A			

OK Cancel Refresh

**Edit Address**

If editing your current address, type over the existing information you wish to change. If adding a new address, type address in boxes below. Please type in your address using Mixed Case (i.e. Correct = 23 McCormick Blvd., Incorrect = 23 MCCORMICK BOULEVARD). Click on the 'Submit' button to submit your address change.

Country: United States

Street Addr/PO Box: 503 Tall Pine Way

Apt., Suite or Unit:

City: Loxahatchee State: FL Florida Zip Code: 33470

County: Postal:

OK Cancel