

MANAGE PERSONAL INFORMATION

Introduction to Employee Self Service All SHARE Users



Manage Personal Information

By the end of this lesson, you will be able to:



- Access the Personal Information section
- Modify your personal details: Address, Contact Details, Ethnic Group and Emergency Contacts
- Submit a request to your Human Resources (HR) Administrator to modify your Name and/or Marital Status

Highlights of This Section

Here are the new and exciting features of Personal Information!



- **Quick access to personal information and benefits:** you can view your address, contact information, emergency contact, as well as your benefits and dependents' information with just one click.
- **Edit personal information:** in SHARE 9.2 you can edit some personal information including your address, contact details, personal email, emergency contact, and more! You can also request a name and marital status change, but need to submit the proper documentation to your HR Administrator.

Access: Personal Information

You can view and modify some of your personal information through SHARE 9.2. You can access your personal details through the **Personal Details** tile or the **Navigator**.



OR




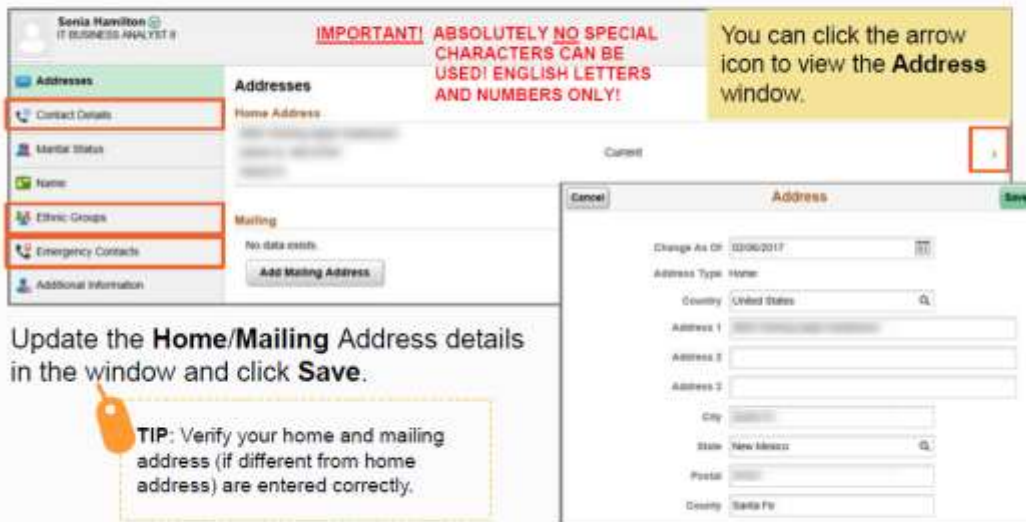
TIP: Access your personal details through the icon to save time!



Click > **NavBar**
> **Navigator**
> **Self Service**
> **Personal Information**

Manage Personal Information: Address

Modify your **Home/Mailing** address in the **Home Address** section. You can click  to make your updates.



IMPORTANT! ABSOLUTELY NO SPECIAL CHARACTERS CAN BE USED! ENGLISH LETTERS AND NUMBERS ONLY!

You can click the arrow icon to view the **Address** window.

Update the **Home/Mailing** Address details in the window and click **Save**.

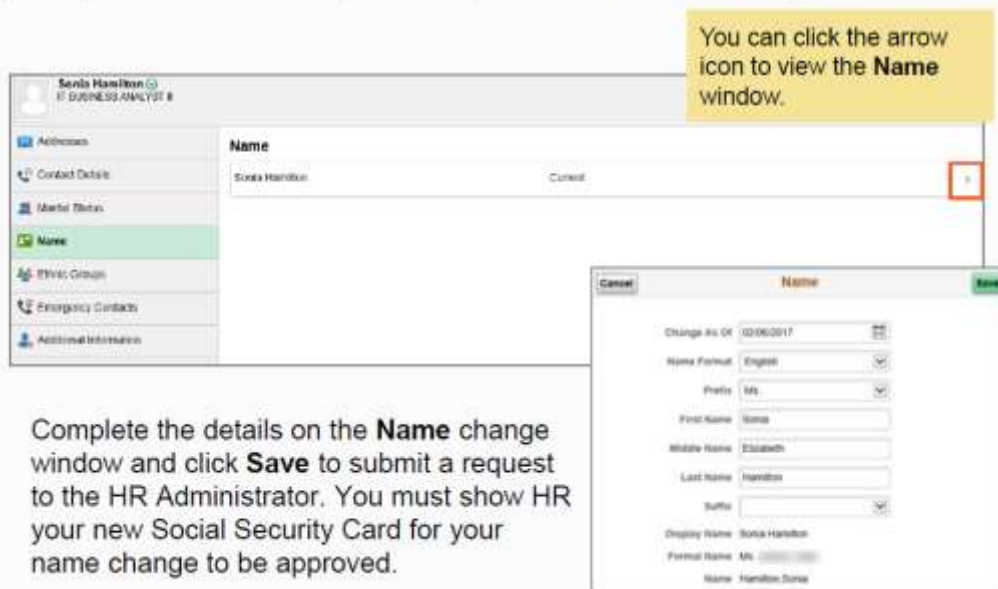
TIP: Verify your home and mailing address (if different from home address) are entered correctly.

Note: SHARE 9.2 allows you to modify your **Address**, **Contact Details**, **Ethnic Group**, and **Emergency Contact** details.

The screenshot shows a user profile for Senia Hamilton, IT BUSINESS ANALYST II. The left sidebar contains navigation links: Addresses, Contact Details, Marital Status, Name, Ethnic Groups, Emergency Contacts, and Additional Information. The main content area is divided into 'Addresses' and 'Mailing' sections. The 'Addresses' section shows a 'Home Address' with a 'Current' status and an arrow icon. The 'Mailing' section shows 'No data exists' and an 'Add Mailing Address' button. A modal window titled 'Address' is open, showing fields for 'Change As Of' (02/06/2017), 'Address Type' (Home), 'Country' (United States), 'Address 1', 'Address 2', 'Address 3', 'City', 'State' (New Mexico), 'Postal', and 'County' (Santa Fe). The modal has 'Cancel' and 'Save' buttons.

Request for Update: Personal Information

Submit a request to modify your **Name** and **Marital Status**. You must provide a copy of your updated Social Security Card to your HR Administrator for approval.



You can click the arrow icon to view the **Name** window.

Complete the details on the **Name** change window and click **Save** to submit a request to the HR Administrator. You must show HR your new Social Security Card for your name change to be approved.

The screenshot shows the same user profile for Senia Hamilton. The left sidebar is the same. The main content area is divided into 'Name' and 'Marital Status' sections. The 'Name' section shows 'Senia Hamilton' with a 'Current' status and an arrow icon. A modal window titled 'Name' is open, showing fields for 'Change As Of' (02/06/2017), 'Name Format' (English), 'Prefix' (Ms), 'First Name' (Senia), 'Middle Name' (Elizabeth), 'Last Name' (Hamilton), 'Suffix', 'Display Name' (Senia Hamilton), 'Formal Name' (Ms Elizabeth Hamilton), and 'Name' (Hamilton, Senia). The modal has 'Cancel' and 'Save' buttons.

Additional Information

Additional Information displays your **Gender**, **Date of Birth**, **Birth Country**, **Birth State**, **Social Security Number**, **Start Date**, and other personal information.



Sonia Hamilton
IT BUSINESS ANALYST

Additional Information

Gender	Female
Date of Birth	██████████
Birth Country	United States
Birth State	Arizona
Social Security Number	██████████
Smoker	
Date Entitled to Medicare	
Original Start Date	05/15/2006
Last Start Date	05/15/2006
Highest Education Level	Master's Level Degree



Note: The State of New Mexico does not track employees' smoker history.

Manage Personal Information Summary

In this lesson we learned:



- ✓ SHARE 9.2 allows you to modify your Address, Contact Details, Ethnic Group, and Emergency Contact Details
- ✓ SHARE 9.2 allows you to submit a request for Name change and Marital Status change

VIEW YOUR BENEFITS

View Benefits

By the end of this lesson, you will be able to:



- Access the Benefits section
- View your Benefits Summary
- View your Dependent/Beneficiary Information

Access: Benefits Section

Follow the navigation path below to access the **Benefits** section.



Click > **NavBar** > **Navigator** > **Self Service** > **Benefits**



View your **Healthcare
Dependent Summary.**

View your **Benefits.**

View your **Dependent
and Beneficiary
Information.**

Health Care Dependent Summary: View List of Dependents

View your dependents by **Name** and **Type of Benefit** under the **HealthCare Dependent Summary** section. The **HealthCare Dependent Summary** displays benefits plans and allows you to view your covered dependent details under each plan.



Click > **NavBar** > **Navigator** > **Self Service** > **Benefits** > **Dependents and Beneficiaries** > **Health Care Dependent Summary**

Follow the steps below to view your **Health Care Dependent Summary**:

1. Select > **Date**
2. Click > **Go**

Health Care Dependent Summary

Sonia Hamilton

Use the link to view your dependents by their name or type of benefit.

To view you **1** as of and **2**, enter the date and select Go.

02/04/2017

Dependent's Summary by Name

Type of Benefit	Description	Name	Relationship
Medical	Presbyterian Pre-Tax	Leah Hamilton	Child
		Eric Hamilton	Child
Dental	Delta Dental Pre-Tax	Eric Hamilton	Child
		Leah Hamilton	Child
Vision	Davis Vision Pre-Tax	Eric Hamilton	Child
		Leah Hamilton	Child

View Benefits Summary

The **Benefit Summary** section provides information on your benefits with **Plan Description** and **Coverage** details.



Click > **NavBar** > **Navigator** > **Self Service** > **Benefits** > **Benefits Summary**

This section allows you to view plans you and your dependents/beneficiaries are enrolled in.

Follow the steps below to view your **Benefits Summary**:

1. Select > **Date**
2. Select > **Go**

Benefits Summary

Sonia Hamilton

To view you **1** as of and **2**, enter the date and select Go.

02/04/2017

Type of Benefit	Plan Description	Coverage or Participation
Medical	Presbyterian Pre-Tax	Employee + Children
Dental	Delta Dental Pre-Tax	Employee + Children
Vision	Davis Vision Pre-Tax	Employee + Children
Employee Assistance Program	New Mexico CAP	Employee Only
CEBRMCO Administrative Fee	Administrative Fee	02/21/2010 Admin Fee
Basic Life/AD&D	Basic Life & AD&D	\$50,000
Short-Term Disability	Short-Term Disability	90% at salary
Sick	Sick Leave	
Vacation	Classified Vacation Leave	
Disaster Sick	Disaster Sick Rights	
Disaster Leave	Disaster Leave Rights	
Pre-Spending Health - U.S.	FSA Medical	\$1,300 Pledge
Pre-Spending Dependent Care	FSA Dependent - Family	\$1,300 Pledge
FSA Parking		None
FSA Meal Allowance		None

View Dependent/Beneficiary Information

SHARE 9.2 allows you to view your dependents and their benefit plans. Follow the navigation path below to access the **Dependent/Beneficiary Information** section:



Click > **NavBar** > **Navigator** > **Self Service** > **Benefits** > **Dependent/Beneficiary Information**

Dependent and Beneficiary Information

Sort by (optional)

The system allows you to update the Benefit Coverage. Select a name to view or modify personal information.

Dependent and Beneficiary Information

Name	Relationship to Employee	Date of Birth	Marital Status	Married (Y/N)	State	Enrolled	Dependent	Beneficiary
Leah Frazier	Child	08/20/2011	Single	08/20/2011	IN	Yes	Yes	Yes
Eric Hamilton	Child	08/20/2011	Single	08/20/2011	IN	Yes	Yes	Yes

View your **Dependent and Beneficiary Information** here. Click a name to display the **Dependent/Beneficiary Personal Information**.

Dependent/Beneficiary Personal Information

Display Information

Dependent/Beneficiary personal information as of 09/23/2017. Use the Edit button on this page to update this information.

Personal Information

First Name: Leah
Middle Name: M
Last Name: Frazier
Name Prefix:
Name Suffix:
Date of Birth: 08/20/2011
Gender: Female
SSN: 123-4567890
Social Security Number:
Relationship to Employee: Child

Marital Information

Marital Status: Single
Married On:
Divorced On:
Spouse: Eric Hamilton

Address and Telephone

Home Address as Employee
Country: United States
Address:
City:
State:
Zip:
Phone: (0000) 000-0000

Work Address as Employee
Phone: (0000) 000-0000

View your **Dependent/Beneficiary personal details**.

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View Benefits Summary

In this lesson we learned:



- ✓ How to navigate to the Benefits Section and its components

- ✓ The HealthCare Dependent Summary displays benefits plans and allows you to view your covered dependent details under each plan

- ✓ The Benefits Summary section allows you to view plans you and your dependents/beneficiaries are enrolled in