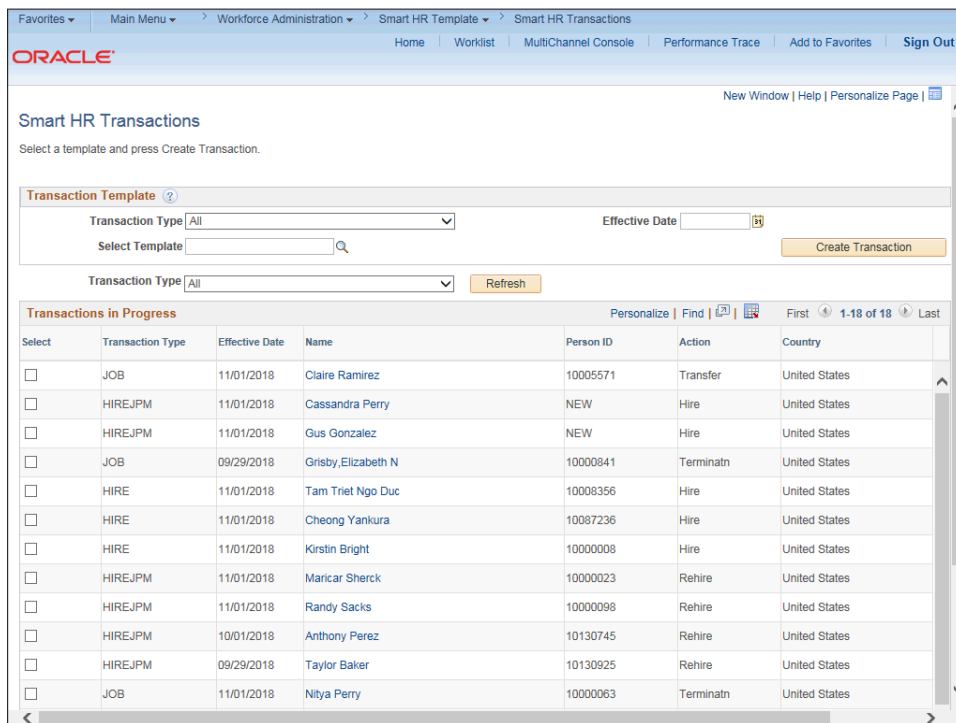



This task provides an overview of how to initiate a personal data change template transaction. This template can be used for academic and staff employees.

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

**Note:** This page also may be available in **Workcenter** depending on your security access.

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



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>
4.	<p>Click in the <b>Effective Date</b> field.</p> <p><input type="text"/></p>
5.	<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. You can update the <b>Effective Date</b> on the <b>Enter Transaction Details</b> page if needed.</p> <p>Enter the desired information into the <b>Effective Date</b> field.</p>
6.	<p>Click the <b>Create Transaction</b> button.</p> <p><a href="#">Create Transaction</a></p>

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

[Continue](#) [Cancel](#)

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. You have access only to employee records within your business unit.</p> <p>Click in the <b>Employee ID</b> field.</p> 
8.	<p>Enter the desired information into the <b>Employee ID</b> field.</p>
9.	<p>The <b>Effective Date</b> is populated based on your entry on the previous page. Ensure this is the date on which the personal data change begins.</p> <p>In this example, accept the default.</p>
10.	<p>In the <b>Address Format</b> field, accept the default of <b>United States</b> or select the <b>Global</b> option, if applicable.</p>
11.	<p>Click the <b>Continue</b> button.</p> 
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>In this example, the employee's date of birth is updated.</b></p>

UCPath Task:  
Initiate Personal Data Change Template  
Transaction (Staff/Acad)

The screenshot shows the Oracle Smart HR Transactions interface. The page title is "Enter Transaction Information". It displays the following information:


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

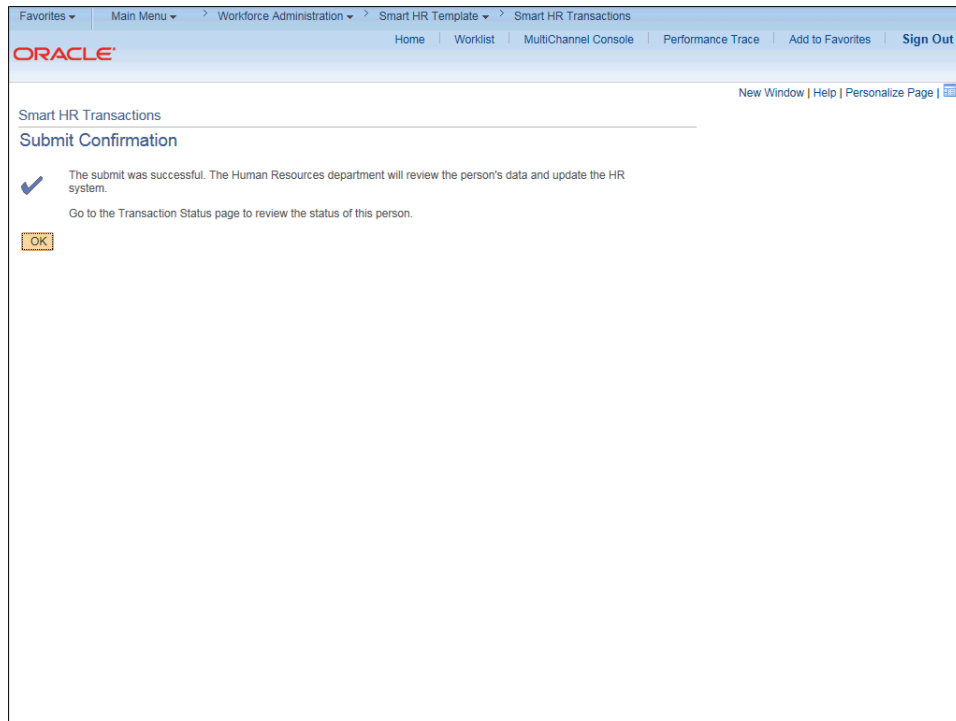
Buttons: Save and Submit, Save for Later, Cancel


Personal Data Section:

- Primary Name - English:
  - \*First Name: Yuyao
  - Middle Name: [Empty]
  - \*Last Name: Gauglitz
  - Name Suffix: [Dropdown]
- Birthday Information:
  - Date of Birth: 01/01/1994
- Diversity - United States:
  - Ethnic Group: [Table with 1 row]
- Person Gender:
  - \*Gender: Male
- Person National ID United States:
  - \*National ID Type: PR
  - National ID: 622147126

Step	Action
14.	Click in the <b>Date of Birth</b> field. <u>01/01/1994</u>
15.	You can type over the existing data to update it. Enter the desired information into the <b>Date of Birth</b> field.
16.	Click the scroll bar.
17.	Click in the <b>Address Line 1</b> field. <u>23499 Lake Vista Drive</u>
18.	You can type over the existing data to update it. Enter the desired information into the <b>Address Line 1</b> field.
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.
22.	Use the <b>Supporting documents</b> link to attach supporting documents for the transaction.
23.	Click the scroll bar.
24.	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.
25.	Click the <b>Save and Submit</b> button.  



Step	Action
26.	Click the <b>OK</b> button.  
27.	The template transaction is routed for approval and appears in the <b>Transactions in Progress</b> section until it is processed.
28.	You have initiated a personal data change template transaction. <b>End of Procedure.</b>

