

Updating or approving changes to your team's personal Information

Name Changes - NB

In order to comply with ESRs specified security clearance level (e-gif level 3); **you must see an original official document before** either changing somebody's name, or before approving the change, e.g. marriage certificate, decree nisi, deed poll.

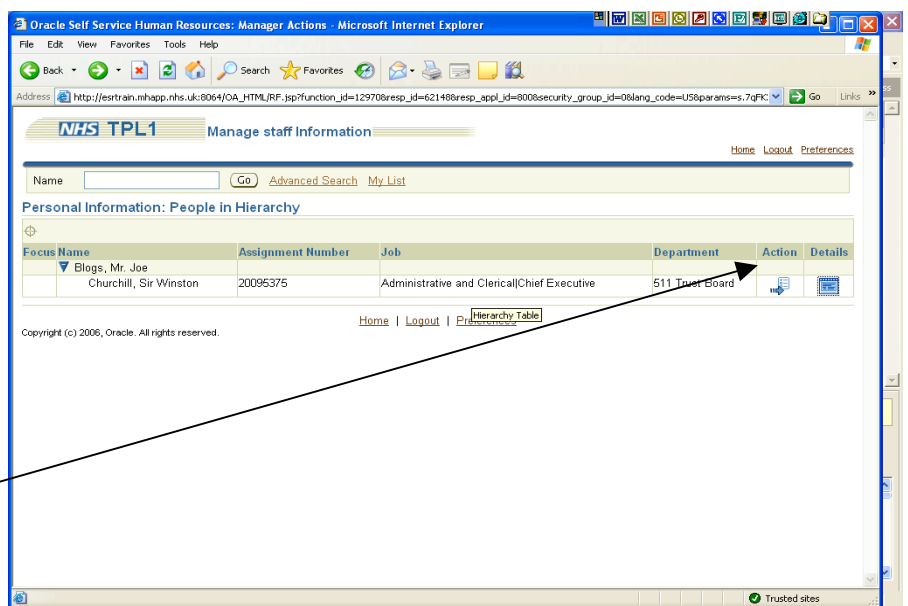
A copy of the original should be taken, signed as "original seen" and dated by the authorising manager, then placed on the personal file

An employee can also update their own details via Employee Self Service. This will prompt a workflow notification to the employee's manager, requiring the manager to approve the changes made. For name changes, again, original documentation must be seen prior to a manager approving the change.

1. To make a change

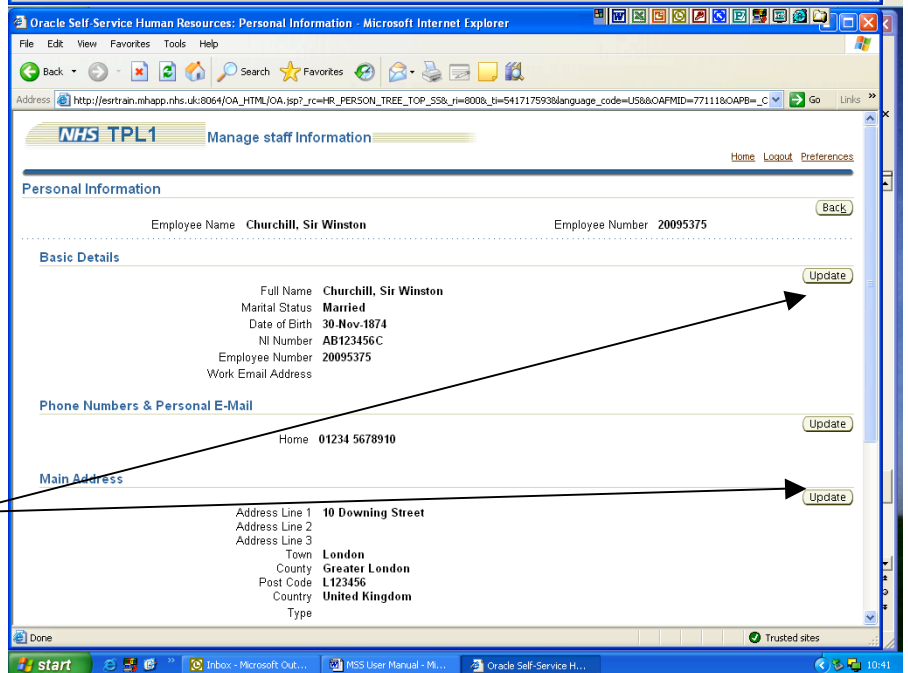
- Click in Personal Information
- Then click on **"Action"** next to the person whose record you want to update

"Action button"



- The Screen will show you all the Personal Details held for your employees

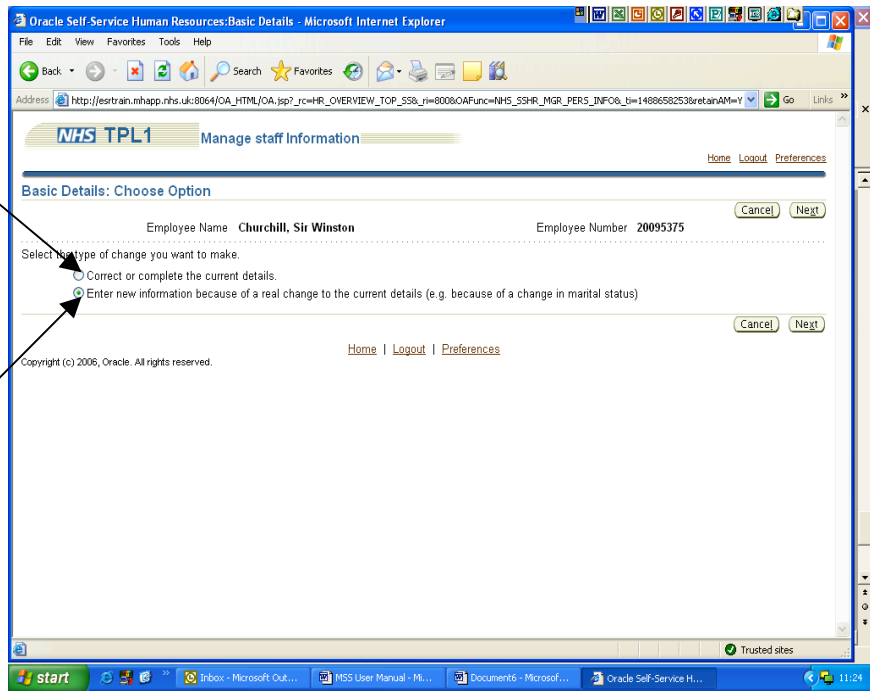
- Select the information that you need to update by clicking on the **Update** date" button.



Once you have clicked the **Update** button you'll be asked if the change that you are making is **a correction**. - Perhaps a misspelling of a name or incorrect house number. This correction overwrites all the incorrect history for this item.

Or -

An update, i.e., an actual change. Examples are house moves, getting married etc. These will have an effective date - the date the change took (or will) take place. The history with the old information is unchanged.

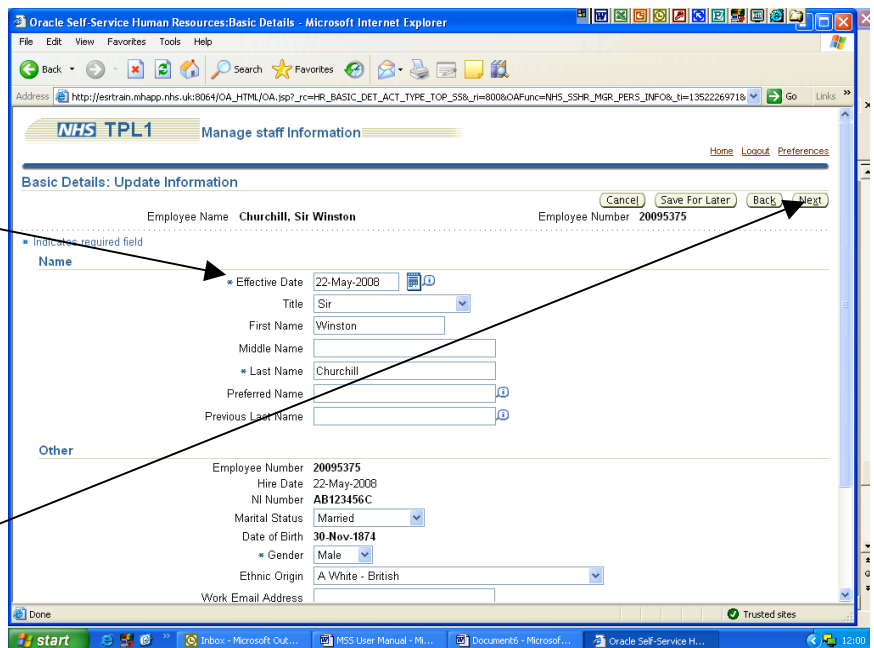


- Select whichever is applicable, then click on **Next**

- If you have selected Update you will need to enter the effective date of the change either by using the calendar or simply typing in the date

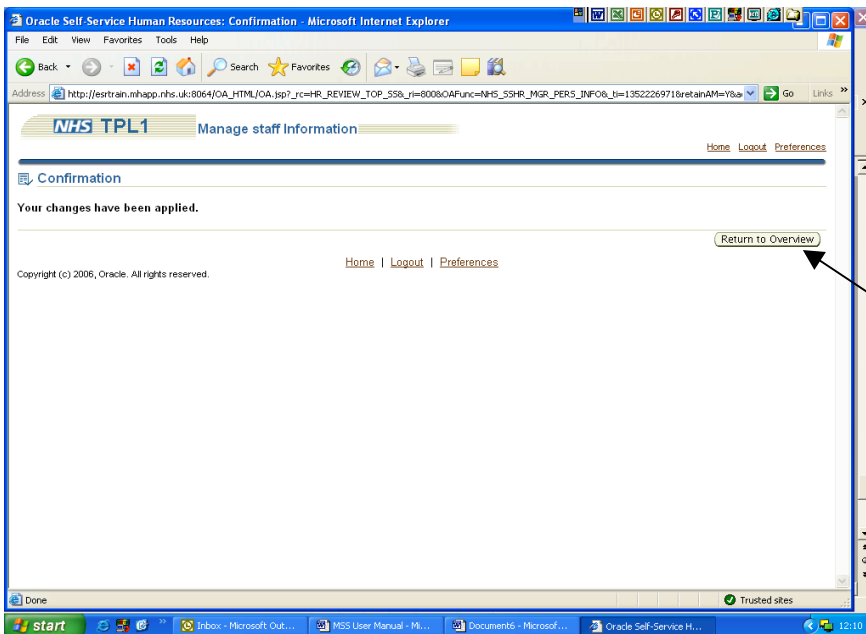
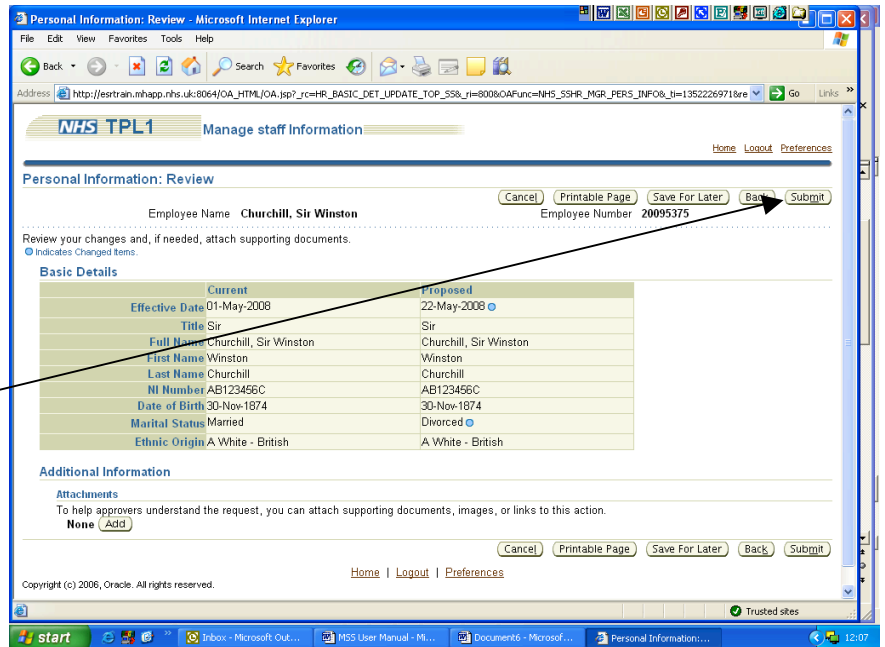
- Make the changes; don't forget to alter the marital status and title in marriage or divorce changes.

- Once all the changes have been entered Click **Next**



Don't forget that you must have sight of the original official documentation before you change a name on ESR.

- review the changes that you have made
- If unhappy click **Back**
And make any amendments
- If happy click **Submit**



- You will then receive confirmation that the changes have been applied

• Click **Return to Overview**

- You will then see your updated changes.
- You can continue to make changes to other data for this employee
- Or you can return to the main menu by clicking "Home"

