

Personal Information, update, add and view

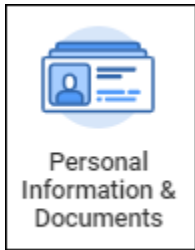
This job aid will provide step by step instructions on how to update, add and view personal information using the Personal Information & Documents worklet.



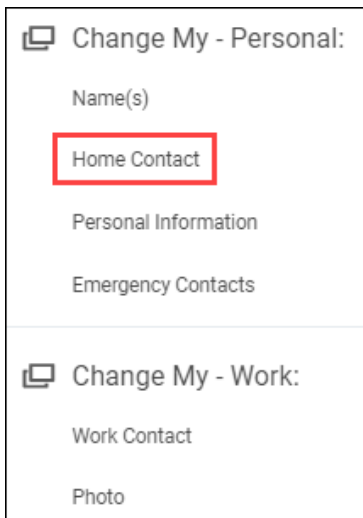
Employees designated as a Protected Worker, or employees needing that designation, should contact their HR Partner prior to making changes in Workday. This includes name(s), address and work location changes.

Update and View Personal Information:

Step 1: Click the **Personal Information & Documents** worklet on your Homepage. Your personal information will populate for you to review.



Step 2: Click on the area you want to update. For this example, we have selected **Change My Home Contact**.



Step 3: Click on the pencil icon in the upper right hand corner of the section you need to **Edit**.



Step 4: The **Effective Date** will be the current date (1). The **Country** field will default to United States (2). Use **Address Line 1** (3), **City** (4), **State** (5), **Postal Code** (6), and **County** (7) fields to enter the address information. Once complete, click the check box (8) at the top right corner to save the address information. Required fields are marked with a red asterisk.

The screenshot shows a form for adding or updating an address. The form is titled "Address" and contains the following fields and controls:

- Address:** 1177 Center St. NE, Salem, OR 97304. A checkmark icon in the top right corner is highlighted with a red box and labeled with a red circle containing the number 8.
- Effective Date:** 12 / 24 / 2019. A calendar icon is present. A red circle with the number 1 is next to the date field.
- Primary:** A checked checkbox.
- Country *:** United States of America. A red circle with the number 2 is next to the field.
- Address Line 1 *:** 1177 Center St. NE. A red circle with the number 3 is next to the field.
- Address Line 2:** (Empty field)
- City *:** Salem. A red circle with the number 4 is next to the field.
- State *:** Oregon. A red circle with the number 5 is next to the field.
- Postal Code *:** 97304. A red circle with the number 6 is next to the field.
- County:** Marion. A red circle with the number 7 is next to the field.

Step 5: Edit additional home contact information as needed. When complete click **Submit** and **Done**.

The screenshot shows the bottom of the form with three buttons:

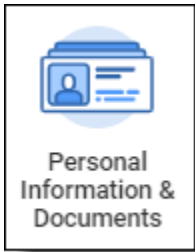
- Submit:** A blue button with white text, highlighted with a red box.
- Save for Later:** A light gray button with dark gray text.
- Cancel:** A light gray button with dark gray text.

Add Personal Information:

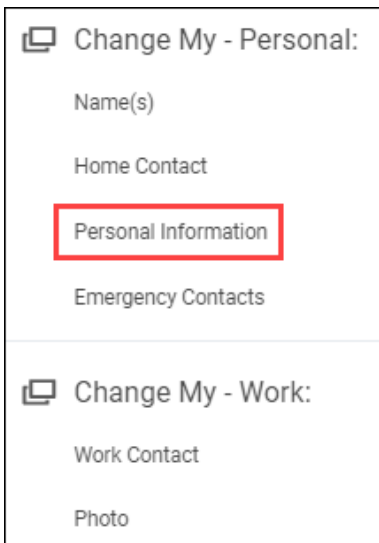


Note: Select *Change My Personal Information* to change your gender, date of birth, race/ethnicity, gender identity and to add a disability or military status.

Step 1: Click the **Personal Information & Documents** worklet on your Homepage. Your personal information will populate for you to review.



Step 2: Click on the area you want to add information. For this example, we have selected **Change My - Personal Information**.



Step 3: Click on the pencil icon or the **Add** button in each section to make updates.

The screenshot shows a form with several sections: Gender, Date of Birth, Age, Race/Ethnicity, Gender Identity, Disability, and Military Service. Each section has a pencil icon for editing. Callouts show dropdown menus for 'Gender' (with options Female and Male) and 'Gender Identity' (with options Female, Male, and Nonbinary/Other). A text box notes that Oregon requires reporting gender for federal demographic information.

Gender (Federally Required)
Gender Identity (Optional)

Note: The state of Oregon is required to report to the Federal government demographic information, which includes gender for employees.

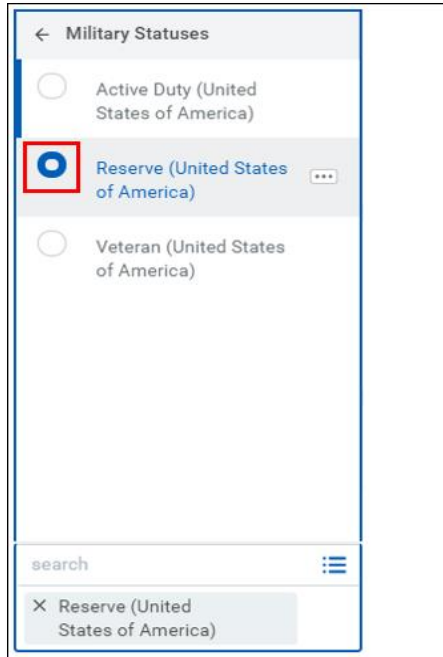
Step 4: For this example, we'll click the **Add** button under the *Military Service* field to add military status.

Military Service
Add

Step 5: Click the menu prompt to select from a list of military status options.

Military Status *
search [Menu Icon]
Military Discharge Date
MM / DD / YYYY [Calendar Icon]
> Details

Step 6: Click the radio button corresponding to the appropriate military status.



Step 7: Enter the **Military Discharge Date** (1). Click the check box when complete (2).



Step 8: Click **Submit** to save the changes. Once submitted, you will be routed to the below screen, indicating your change has been successfully submitted and the process is complete.

