

# **Entering and Updating Names & Addresses in PayServ**

February 2010


# During the Hire Process

- After entering the employee's Person Id:
  - Click **Hire the Person**;
  - Enter the Effective Date;
    - Future dating is not allowed during the hire process
  - Click **Add Name** hyperlink.

Name History Personal History Identity/Diversity

Person ID: 010720100

Name	Find   View All	First	1 of 1	Last
*Effective Date:	01/07/2010			
Format Using:	English			
Display Name:				<a href="#">Add Name</a>



### Edit Name


English Name Format

Prefix:

First Name:  Middle Name:

Last Name:


Suffix:

 Display Name:

Formal Name:


Name:

# Entering Names

- Complete the **Edit Name** section
  - Select **OK**
    - Not necessary to select  unless you wish to view **Display Name & Formal Name** format.

**Edit Name**

English Name Format

Prefix:	<input type="text"/>		
First Name:	<input type="text" value="KELLY"/>	Middle Name:	<input type="text" value="L."/>
Last Name:	<input type="text" value="GREEN"/>		
Suffix:	<input type="text"/>		
 Display Name:	KELLY GREEN		
Formal Name:	KELLY GREEN		
Name:	GREEN,KELLY L.		

Upon selecting **OK** you will be returned to the **Name History** page.

**Name History** | Personal History | Identity/Diversity

Person ID: 010720100

**Name** Find | View All First 1 of 1 Last

\*Effective Date: 01/07/2010 + -

Format Using: English

Display Name: KELLY GREEN [Edit Name](#)

**Biographic Information**

Date of Birth: [ ] 0 Years 0 Months

Birth Country: USA United States

Birth State: [ ]

Birth Location: [ ]

FAS Code: [ ]

New York Retiree Indicator

Waive Data Protection

**Prior SSN** First 1 of 1 Last

[ ]

**Biographical History** Find | View All First 1 of 1 Last

\*Effective Date: [ ] + -

\*Gender: Unknown


\*Highest Education Level: A-Not Indicated

\*Marital Status: Single As of: [ ]

Language Code: [ ]

## Proceed to **Personal History**

- After completing required information on the **Name History** page select the **Personal History** tab.
  - Note address type defaults to HOME
- Select the **Add Address Detail** hyperlink



[Add Address  
Detail](#)

[Name History](#) | [Personal History](#) | [Identity/Diversity](#)

Person ID: 010720100

**Current Addresses** Find | View All | First 1 of 1 Last

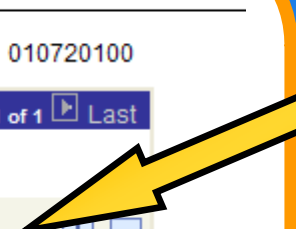
Address Type	As Of Date	Status	Address	
Home				<a href="#">Add Address Detail</a> + -

**Phone Information** Find | First 1 of 1 Last

*Phone Type	Telephone	Extension	Preferred	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	+ -

**Email Addresses** Find | First 1 of 1 Last

*Email Type	*Email Address	Preferred	
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	+ -



### Address History

Address Type: Home

**Address History** Find First 1 of 1 Last

*Effective Date	Country	Status	Address:	
<input type="text"/>	USA	A		<a href="#">Add Address</a> + -

OK Cancel Refresh

# Entering an Address

- Proceed with entering an effective date
  - Use the same effective date that was used on the **Name History** page.
  - Verify or change default Country
- Select the **Add Address** hyperlink



# Edit Address Page


- Insert required information
  - Note: County should be entered if known.

**Edit Address**

Country: United States

Address 1:

Address 2:

City:  State:   Postal:

County:

Select **OK** when completed

### Edit Address

Country: United States

Address 1:

Address 2:

City:  State:   New York Postal:

County:

Select **OK** when completed

### Address History

Address Type: Home

Address History				Find	First	1 of 1	Last
*Effective Date	Country	Status	Address:				
<input type="text" value="01/07/2010"/> <input type="button" value="B"/>	<input type="text" value="USA"/> <input type="button" value="Q"/>	A	259 Mountain View Way Castleton, NY 12033 Rensselaer	<input type="button" value="+"/> <input type="button" value="-"/> <a href="#">Add Address</a>			



Verify final address and select **OK**

# Completed Address




[Name History](#) [Personal History](#) [Identity/Diversity](#)

Person ID: 010720100

## Current Addresses Find | View All | First 1 of 1 Last

<u>Address Type</u>	<u>As Of Date</u>	<u>Status</u>	<u>Address</u>		
Home	01/07/2010	A	259 Mountain View Way Castleton, NY 12033 Rensselaer	<a href="#">Edit/View</a> <a href="#">Address Detail</a>	 

## Phone Information Find | First 1 of 1 Last

<u>*Phone Type</u>	<u>Telephone</u>	<u>Extension</u>	<u>Preferred</u>		
	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>		

## Email Addresses Find | First 1 of 1 Last

<u>*Email Type</u>	<u>*Email Address</u>	<u>Preferred</u>		
	<input type="text"/>	<input type="checkbox"/>		

**Updating  
Names & Addresses**

# Changing an employee's name

- To begin, navigate to: **Workforce Administration, Personal Information, Modify a Person**
- Enter the EmplID.
- Select **Search**

Biographical Details [Contact Information](#) [Regional](#)

Person ID: 010720100 GREEN,KELLY L.

Name	Find   View All	First	1 of 1	Last
Effective Date: 01/07/2010				<a href="#">+</a> <a href="#">-</a>
Format Using: English				
Display Name: KELLY GREEN				<a href="#">View Name</a>

Insert a new row

Biographical Details [Contact Information](#) [Regional](#)

Person ID: 010720100 GREEN,KELLY L.

Name	Find   View All	First	1 of 2	Last
*Effective Date: <input type="text"/>				<a href="#">+</a> <a href="#">-</a>
Format Using: English				
Display Name: KELLY GREEN				<a href="#">Edit Name</a>

Enter the Effective Date and click **Edit Name**

Enter changes

### Edit Name


English Name Format

Prefix:

First Name:  Middle Name:

Last Name:

Suffix:

 Display Name: KELLY GREEN

Formal Name: KELLY GREEN


Name: GREEN,KELLY L.

You can select to  display the name or proceed to click

Biographical Details Contact Information Regional

Person ID: 010720100 GREEN,KELLY L.

Name Find | View All First  Last

\*Effective Date:  

Format Using: English

Display Name: KELLY HANNAFORD [Edit Name](#)

Click

# Changing an Employee's Address

- To begin navigate to: **Workforce Administration > Personal Information > Modify a Person.**
- Enter the EmplID.
- Select **Search**
- Click the **Contact Information** tab
  - We will be changing a Home address



[Biographical Details](#) | [Contact Information](#) | [Regional](#)

GREEN,KELLY L. Person ID: 010720100

**Current Addresses** Find | View All | First 1 of 1 Last

<u>Address Type</u>	<u>As Of Date</u>	<u>Status</u>	<u>Address</u>	
Home	01/07/2010	A	259 Mountain View Way Castleton, NY 12033 Rensselaer	<a href="#">View Address Detail</a> <span style="float: right;">+ -</span>

Click **View Address Detail**.

**Address History**

Address Type: Home

**Address History** Find First 1 of 1 Last

<u>Effective Date</u>	<u>Country</u>	<u>Status</u>	<u>Address:</u>	
01/07/2010	USA	A	259 Mountain View Way Castleton, NY 12033 Rensselaer	<span style="float: right;">+ -</span>

OK Cancel Refresh

Insert a row.

**Address History**

Address Type: Home

*Effective Date	Country	*Status	Address:	
01/21/2010	USA	A	259 Mountain View Way Castleton, NY 12033 Rensselaer	<a href="#">Add Address</a>
01/07/2010	USA	A	259 Mountain View Way Castleton, NY 12033 Rensselaer	

OK Cancel Refresh

Inserted row will appear with today's effective date. Change the date to what is needed and click **Add Address**.

### Edit Address

Country: United States

Address 1:

Address 2:

City:  State:   Postal:

County:

Change information and click **OK**.

### Address History

Address Type: Home

Address History				Find	First	1-2 of 2	Last	
*Effective Date	Country	*Status	Address:					+ -
<input type="text" value="01/28/2010"/>	<input type="text" value="USA"/>	<input type="text" value="A"/>	110 State Street Albany, NY 12207 Albany					<a href="#">Add Address</a>
Effective Date								+ -
01/07/2010	USA	A	259 Mountain View Way Castleton, NY 12033 Rensselaer					

Verify and click **OK**.

[Biographical Details](#)

[Contact Information](#)

[Regional](#)

GREEN,KELLY L.

Person ID: 010720100

**Current Addresses** Find | View All | First 1 of 1 Last

Address Type	As Of Date	Status	Address	
Home	01/07/2010	A	259 Mountain View Way Castleton, NY 12033 Rensselaer	<a href="#">View Address Detail</a> + -

**Phone Information** Find | First 1 of 1 Last

*Phone Type	Telephone	Extension	Preferred
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

**Email Addresses** Find | First 1 of 1 Last

*Email Type	*Email Address	Preferred
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

[Save](#) [Return to Search](#) [Previous tab](#) [Next tab](#) [Refresh](#)

[Update/Display](#) [Include History](#) [Correct History](#)

[Biographical Details](#) | [Contact Information](#) | [Regional](#)

Click **Save**.

**Menu**

Search:

- ▷ My Favorites
- ▷ PayServ Custom
- ▷ Workforce Administration
- ▷ Benefits
- ▽ Payroll for North America
  - ▽ Employee Pay Data USA
    - ▷ Tax Information
    - ▷ Deductions
      - [Additional Pay \(Agency\)](#)
      - [Adjust Sal Withhold Balance](#)
      - [Time Entry](#)
      - [Time Entry \(OSC\)](#)
      - [Workers Comp Refund](#)
      - [Workers Compensation Data](#)
      - [Create Additional Pay](#)
      - [Request Direct Deposit](#)
      - **Update Payroll Options**
    - ▷ Payroll Processing USA
    - ▷ Retroactive Payroll
    - ▷ Payroll Distribution
    - ▷ Periodic Payroll Events USA
      - ▷ U.S. Quarterly Processing
      - ▷ U.S. Annual Processing
    - ▷ Payroll Interface
    - ▷ Organizational Development
    - ▷ Workforce Monitoring

Payroll Data 1 **Payroll Data 2**

GREEN,KELLY L.      EmplId: 010720100      Empl Rcd Nbr 0      Company: NYS

Paycheck Delivery Option     Company Distribution     Postal Service

Distribution Mail Option

Home Address     Mailing Address     Check Address    [Update Check Address](#)

Update Employee's Check Addr

**Current and Future Addresses**    Find | View All    First 1 of 1 Last

\*Effective Date:     \*Status: Active

Country:

Address: [Edit Address](#)

**Remember:** If adding or changing a Mailing Address or Check Address, go to **Payroll for North America > Employee Pay Data USA > Update Payroll Options.**