

# Workday Job Aid

## Personal Information Worklet

Use this job aid to change your personal information, including:

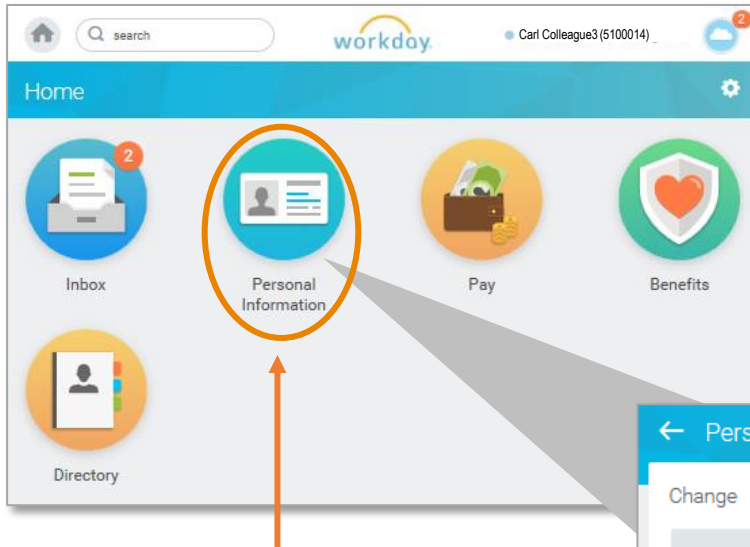
- **Contact Information:** Such as personal or business address, phone, and email
- **Personal Information:** Such as marital status, citizenship status, and disability
- **Emergency Contacts:** Person(s) Trinity Health should contact in case of emergency
- **Photo:** Picture shown for you within Workday
- **Legal Name:** Name used on official documents, such as your payslip, W-2, etc.
- **Preferred Name:** Nickname that shows within Workday

**NOTE:** You may be required to provide documentation.

To learn more about Workday, find job aids and videos at <http://workday.trinity-health.org>.

For additional assistance, contact your Tier 1 resource, as noted on the Workday website <http://workday.trinity-health.org>.

# Personal Information Worklet



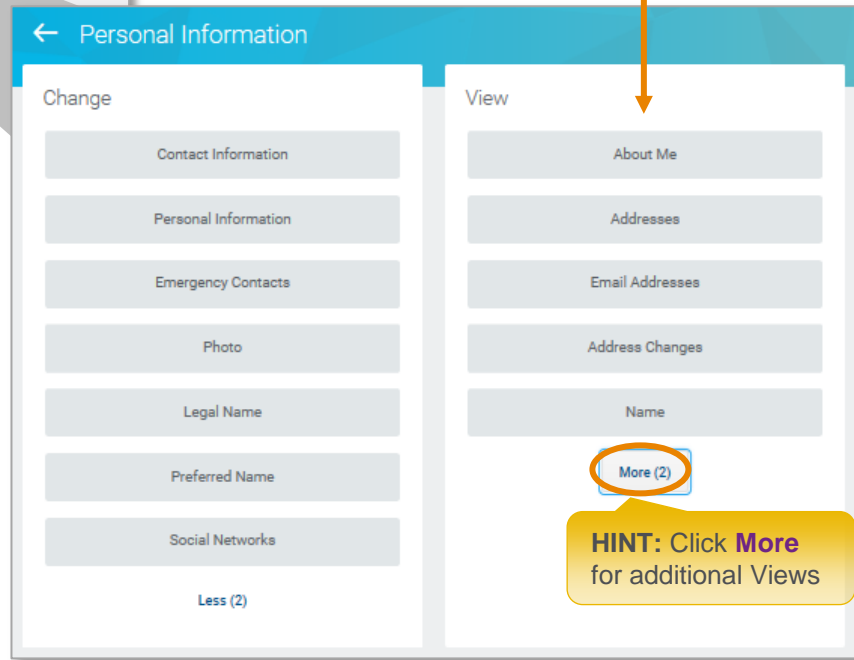
**NOTE:** You may need to provide proof of change.

**VIEW**  
Click an item to **view** your personal information

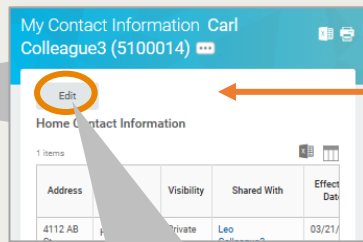
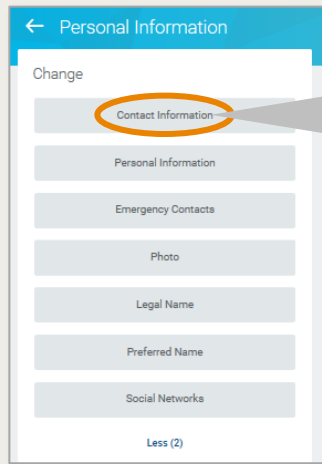
Log in to Workday and click the **Personal Information** worklet

Click the item you wish to **change** — see the following pages for further instructions on:

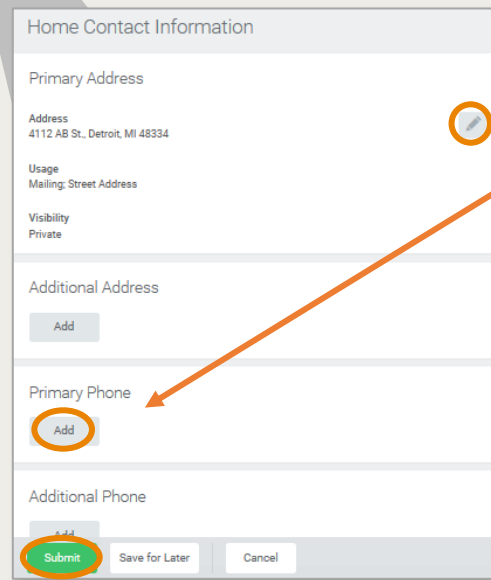
- **Page 3:** Contact Information
- **Page 4:** Personal Information
- **Page 5:** Emergency Contacts
- **Page 6:** Photo
- **Page 7:** Legal Name
- **Page 8:** Preferred Name



# Contact Information Change



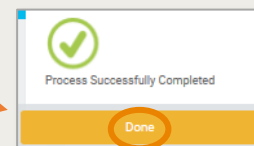
1. Click **Edit**



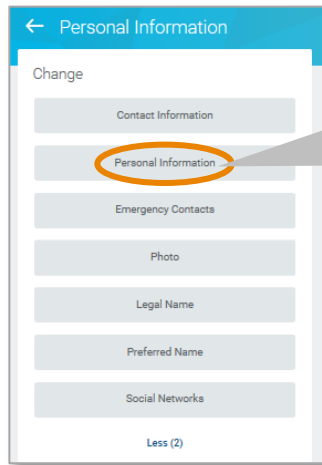
2. Click the **edit icon** or **Add** to make changes to your personal or business:

- Address
- Phone
- Email
- Instant Messenger
- Web Address

3. Click **Submit** when complete; then click **Done**

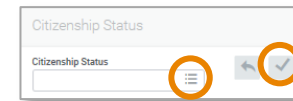


# Personal Information Change

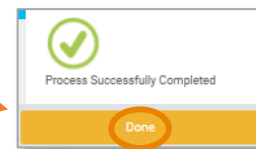


1. Click the **edit icon** to add/change your:
- Gender
  - Date of Birth
  - Marital Status
  - Race/Ethnicity
  - Citizenship Status
  - Disability
  - Military Service

**HINT:** Click the **prompt icon** for a menu of options and the **checkmark icon** to accept changes



2. Click **Submit** when complete; then click **Done**



Your personal information change request will be forwarded to HR for approval and processing

# Emergency Contacts Change

Personal Information

- Contact Information
- Personal Information
- Emergency Contacts**
- Photo
- Legal Name
- Preferred Name
- Social Networks
- Less (2)

My Emergency Contacts Carl Colleague3

1 items

Priority	Emergency Contact	Relationship	Pre Lan
1	Mary Colleague3	Spouse	

1. Click **Edit**

**NOTE:** You must provide at least one form of contact information (e.g., phone, email).

Change My Emergency Contacts Carl Colleague3 (5100014)

Primary Emergency Contact

Legal Name

Legal Name \*  
Mary Colleague3

Relationship

Relationship \*  
Spouse

Preferred Language

2. Click the **edit icon** to change the following information for your emergency contact (\* indicates required information):

- Legal Name\*
- Relationship\*
- Preferred Language
- Address
- Phone
- Email
- Instant Messenger
- Web Address

Relationship

Relationship \*

X Spouse

**HINT:** Click the **prompt icon** for a menu of options and the **checkmark icon** to accept changes

Alternate Emergency Contacts

Alternate Emergency Contacts

Add

Submit Save for Later Cancel

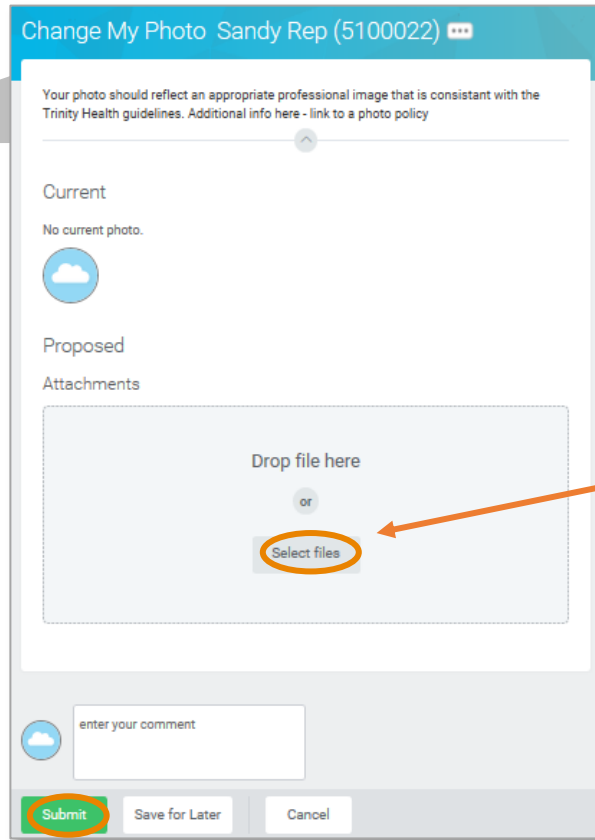
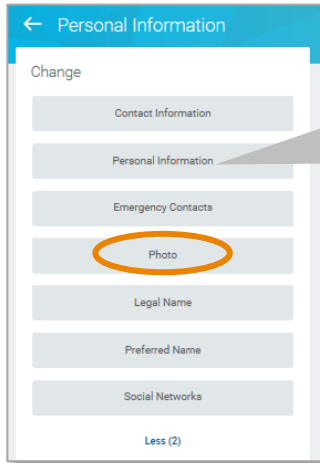
3. To add an alternate emergency contact, scroll down and click **Add**

4. Click **Submit** when complete; then click **Done**

Process Successfully Completed

Done

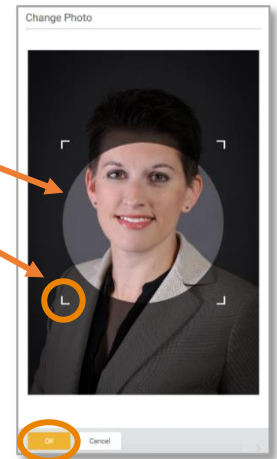
# Photo



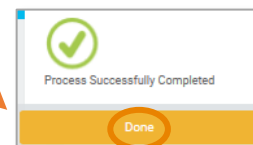
## NOTE: Photo Guidelines:

- An individual head shot -shoulders and above
- Clear, of good quality
- Appropriate business/business casual attire
- Caricatures, group, vacation, sports/hobby photos, etc., DO NOT meet guidelines.
- Requires manager approval
- Photos should be Jpeg (.JPG) files
- Workday allows you to crop photos that you upload. However, when the photo is transferred to Outlook, the application only recognizes the source file. If you upload a group photo, for example, that is what will appear in Outlook, even if you crop it in Workday.

1. Click **Select files** to upload a picture
2. Drag **the circle** to center over the part of the picture you want
3. Click and drag **a corner** to make the circle smaller or larger
4. Click **OK**



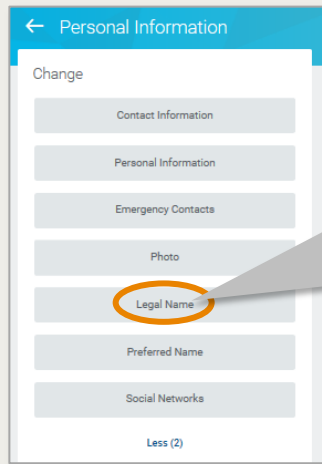
5. Click **Submit** when complete; then click **Done**



Your photo request will be forwarded to your Manager for approval

# Legal Name Change

**NOTE:** You must provide proof of name change.



The main form titled 'Change My Legal Name Carl Colleague3'. It contains the following fields:

- Country: United States of America (with a red asterisk)
- Prefix: (empty)
- First Name: Carlos (with a red asterisk)
- Middle Name: (empty)
- Last Name: Colleague3 (with a red asterisk)
- Suffix: Sr. (with a red asterisk)
- enter your comment: (text input)
- Attachments: Drop files here area with a 'Select files' button circled in orange.
- Submit: (green button, circled in orange)
- More: (dropdown menu)

1. Make changes, as appropriate (\* indicates required information)
2. Type any **comments**
3. Click **Select files** to upload required documentation (e.g., marriage license, divorce decree)

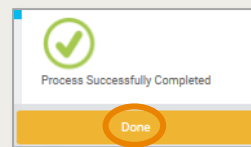
An inset form for an attachment titled 'TestAttachment.pdf'. It has a 'Description' text input and a 'Category' dropdown menu with a red asterisk. An orange arrow points to the 'Category' field.

Add a description and choose **Legal Name Change** from the category list

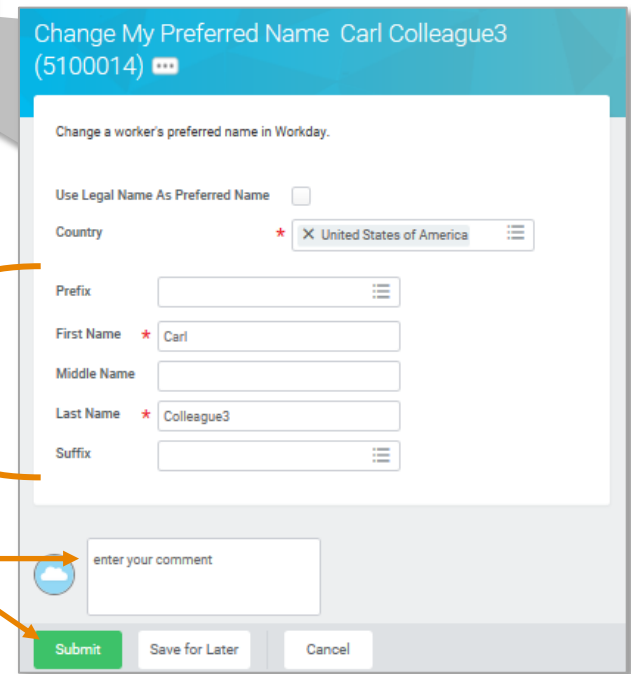
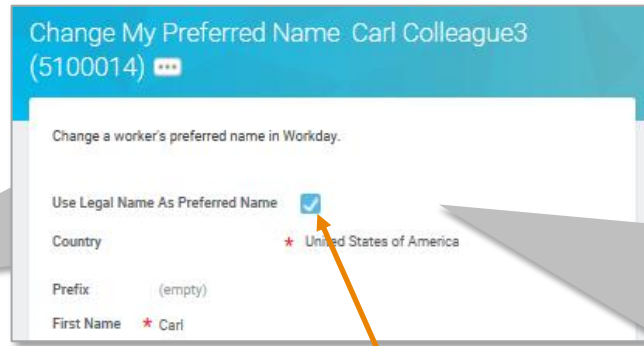
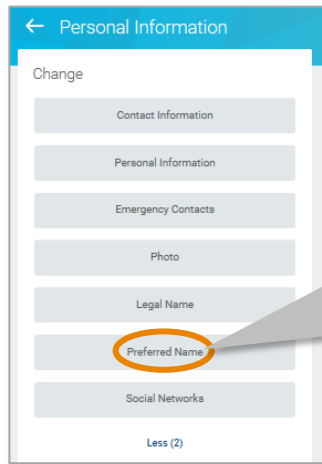
**HINT:** Click **Upload** to add more documents

Your legal name change request will be forwarded to HR for approval and processing

5. Click **Submit** when complete; then click **Done**



# Preferred Name Change



1. Uncheck the **box** to make edits to your preferred name
2. Make changes, as appropriate (\*indicates required information)
3. Type any **comments** and click **Submit**
4. Click **Done**

