



<b>File Name</b>	Name Change_BUSPROC.doc
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## Name Change

### Concept

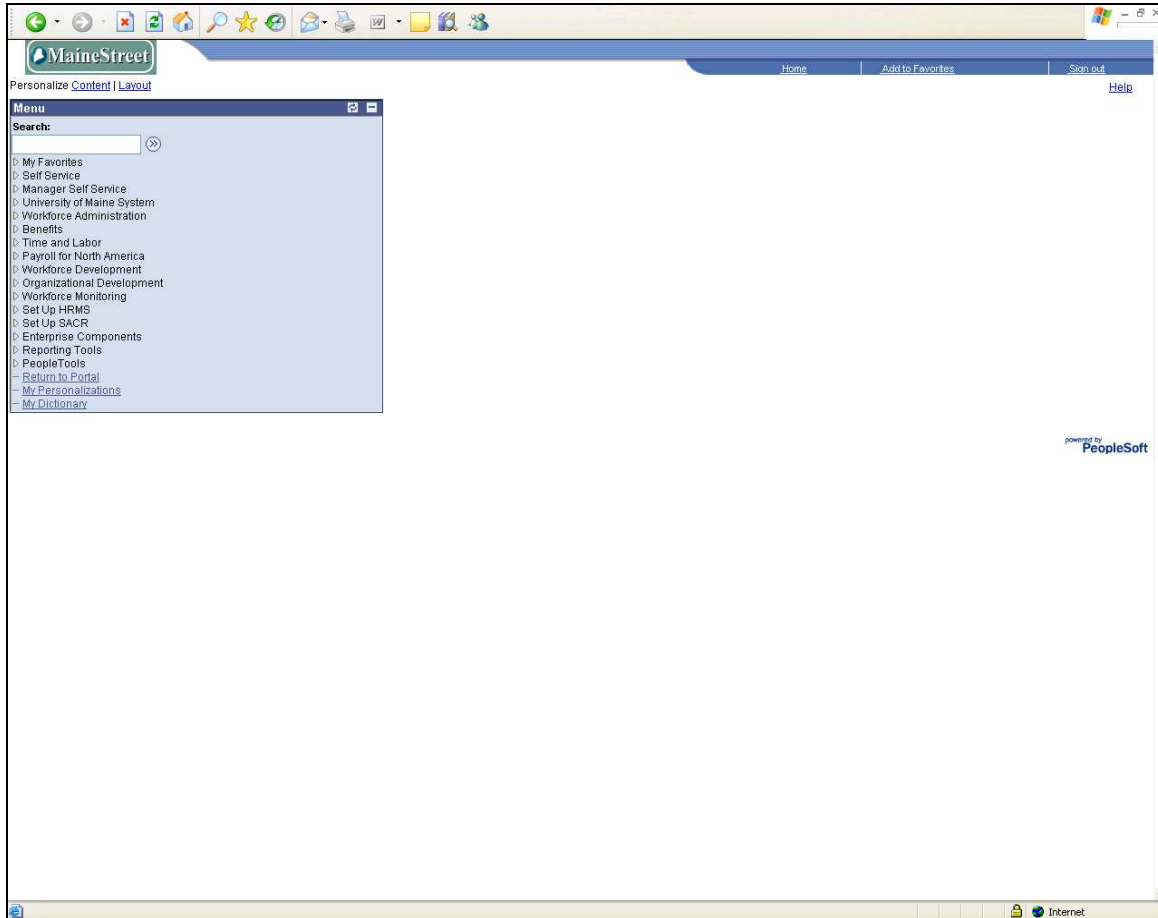
**Description:**

Employees must submit name changes to the Human Resources office. Changes are effective-dated and involve inserting a new row of data.

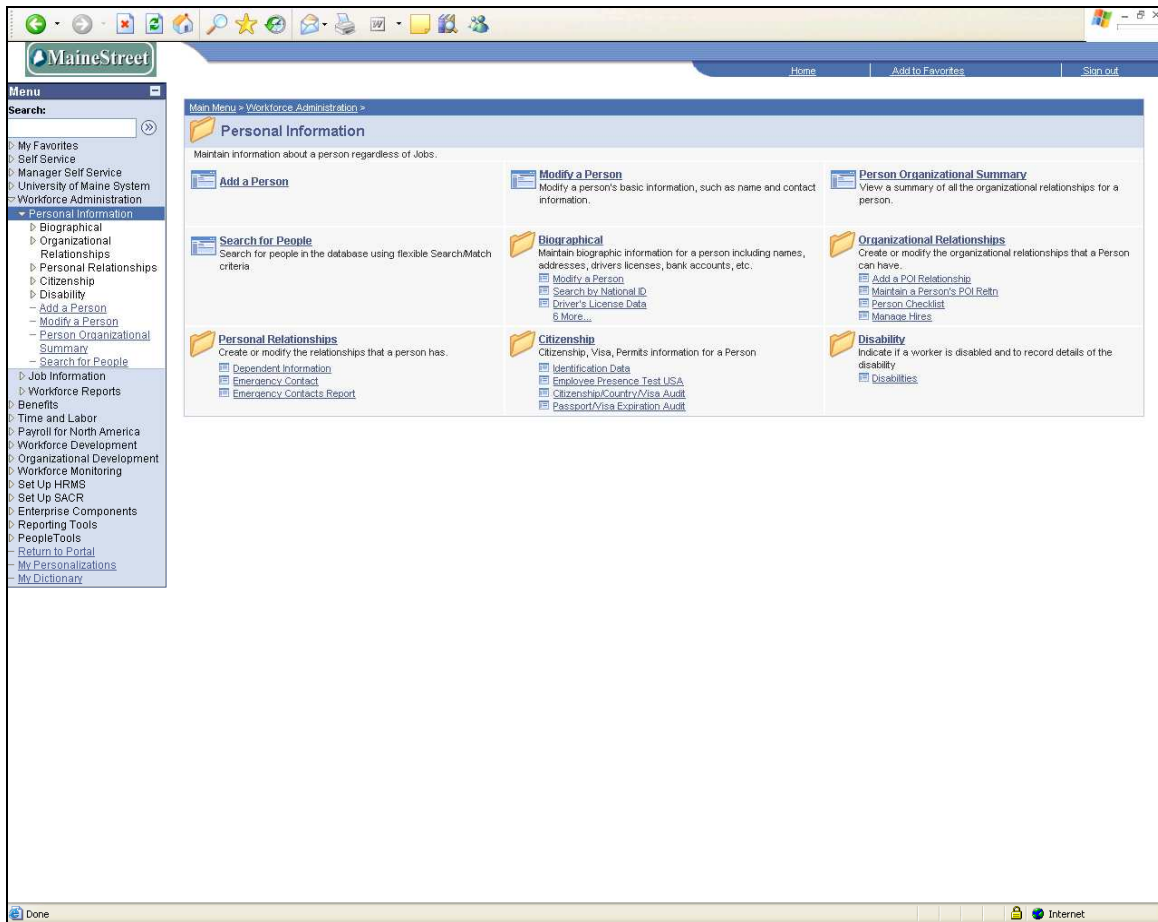
**NOTE:Employee are required to submit appropriate documentation before a name change is entered into the system.**

Please refer to: <http://www.maine.edu/pdf/UsingUPK.pdf>

## Navigation:

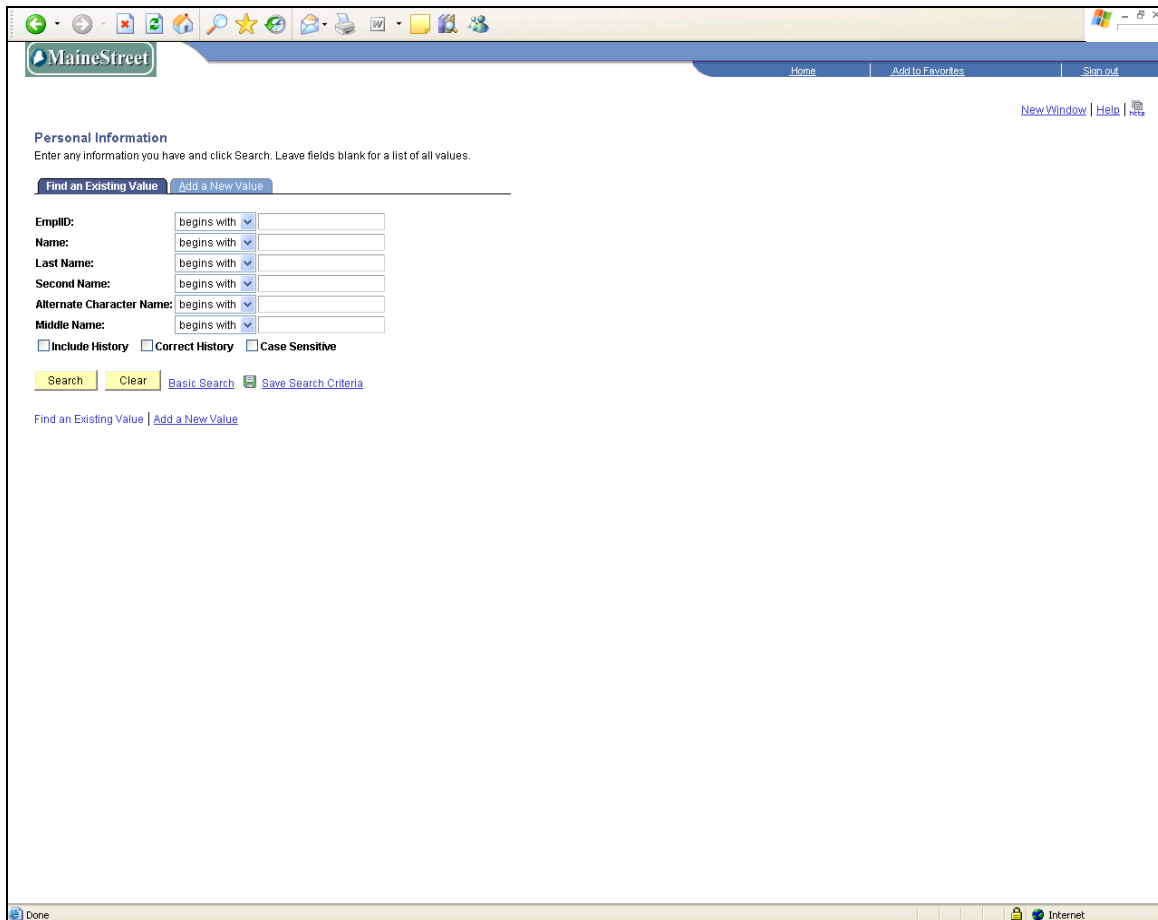


Step	Action
1.	Click the <b>Workforce Administration</b> link. 
2.	Click the <b>Personal Information</b> link. 



- | Step | Action                                 |
|------|--|
| 3.   | Click the <b>Modify a Person</b> link. |

### Procedure:



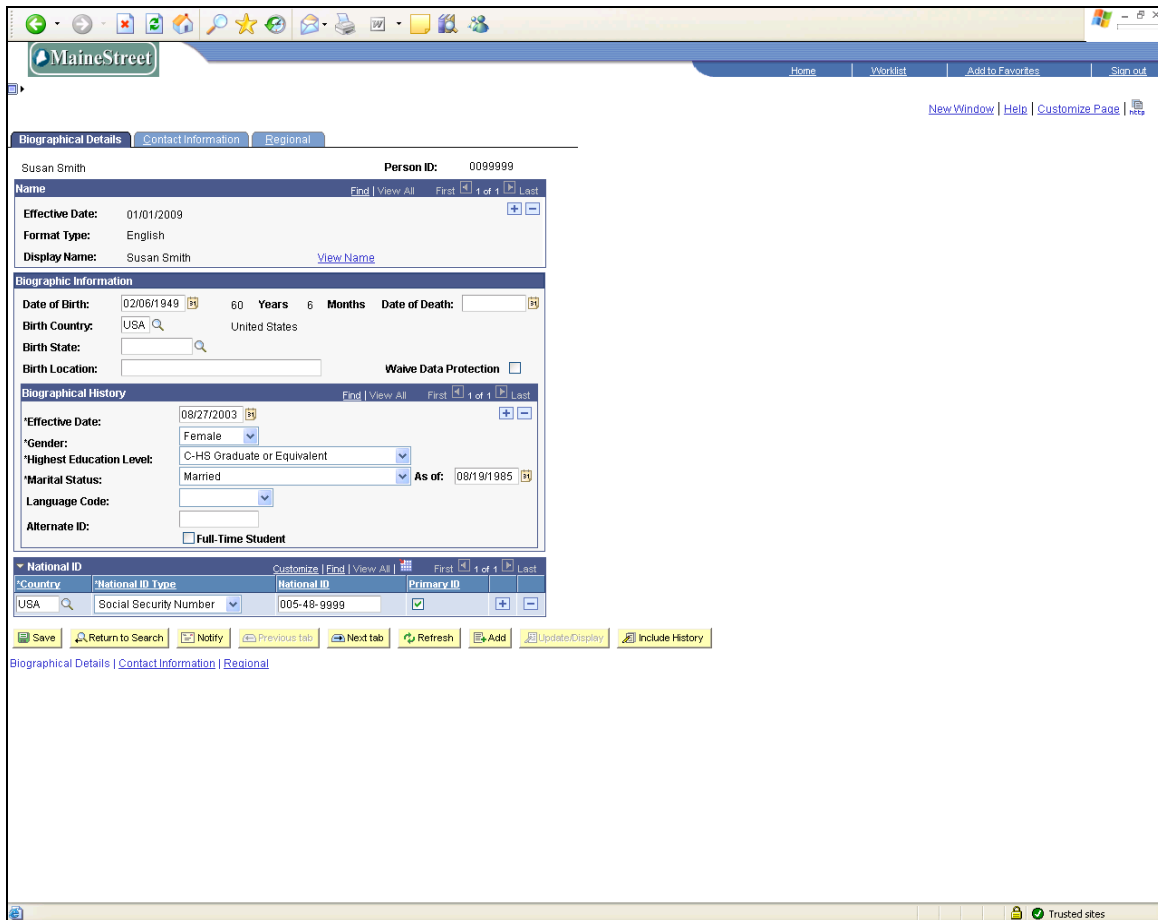
The screenshot shows a web browser window displaying the MaineStreet HRMS search page. The page has a blue header with the MaineStreet logo and navigation links: Home, Add to Favorites, and Sign out. Below the header, there are links for New Window, Help, and HRMS. The main content area is titled "Personal Information" and includes a search instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values." There are two tabs: "Find an Existing Value" (selected) and "Add a New Value". The search form contains several fields with dropdown menus: "EmplID:", "Name:", "Last Name:", "Second Name:", "Alternate Character Name:", and "Middle Name:". Each dropdown menu is currently set to "begins with". Below the fields are three checkboxes: "Include History", "Correct History", and "Case Sensitive". At the bottom of the form are buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria". At the very bottom of the page, there are links for "Find an Existing Value" and "Add a New Value".

Step	Action
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- |    |  |
|----|--|
| 4. | Enter EmplID, Name, or Last Name. Drop down menus can be used to select 'begins with', 'contains', etc. to assist in locating an employee. The more information that is entered, the narrower the search and the shorter the search results list for review. |
| 5. | Click the <b>Search</b> button.  |

If multiple employee records are listed, click on the appropriate employee record.

**Search**



The screenshot shows a web browser window displaying the HRMS interface. The page title is "MaineStreet". The user is logged in as "Susan Smith" with a "Person ID" of "0099999". The page has tabs for "Biographical Details", "Contact Information", and "Regional". The "Biographical Details" tab is active, showing the following information:

- Name:** Susan Smith (Person ID: 0099999)
- Effective Date:** 01/01/2009
- Format Type:** English
- Display Name:** Susan Smith (with a "View Name" link)

Below the name section is the "Biographic Information" section:

- Date of Birth:** 02/06/1949 (60 Years 6 Months)
- Birth Country:** USA (United States)
- Birth State:** (empty)
- Birth Location:** (empty)
- Waive Data Protection:** (checkbox)

Below that is the "Biographical History" section:





- Effective Date:** 08/27/2003
- Gender:** Female
- Highest Education Level:** C-HS Graduate or Equivalent
- Marital Status:** Married (As of: 08/19/1985)
- Language Code:** (empty)
- Alternate ID:** (empty)
- Full-Time Student:** (checkbox)

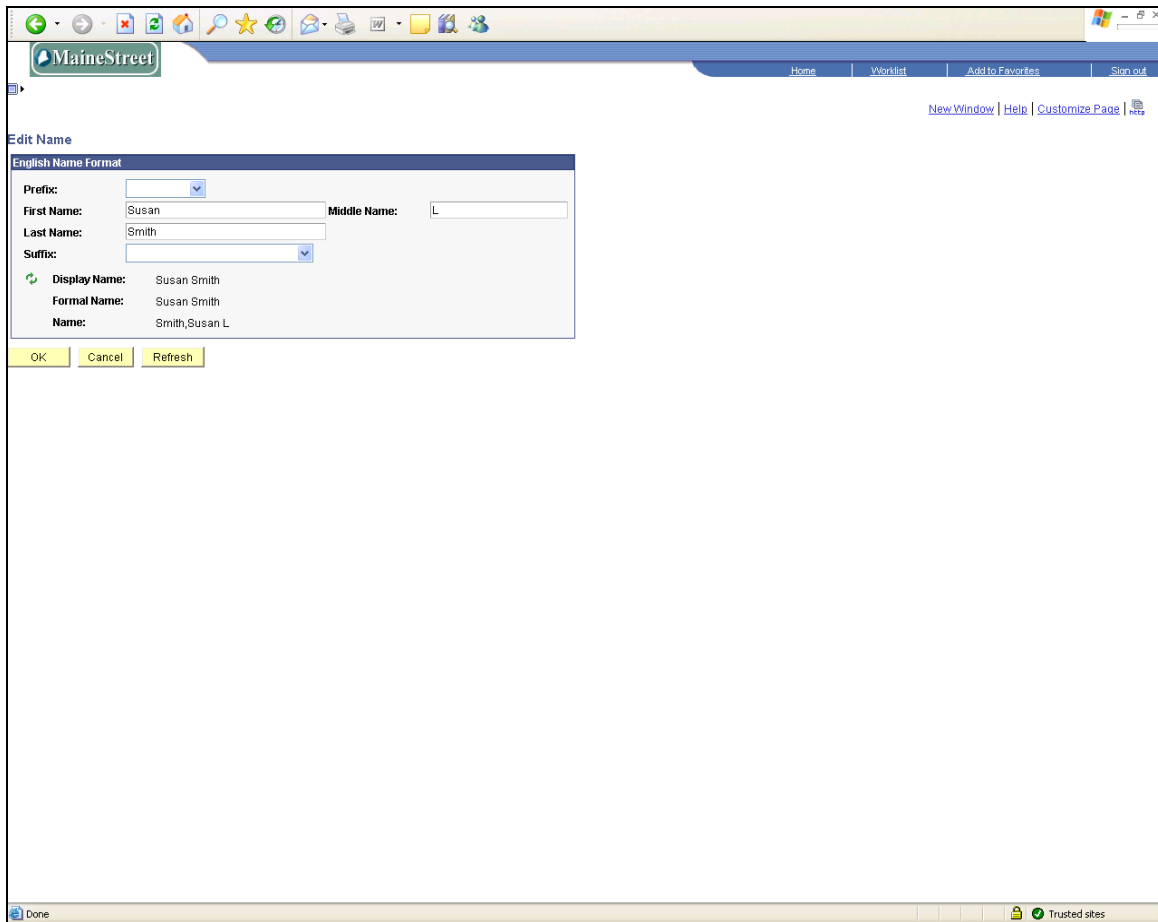
At the bottom, there is a "National ID" table:

Country	National ID Type	National ID	Primary ID
USA	Social Security Number	005-48-9999	<input checked="" type="checkbox"/>

Navigation buttons include Save, Return to Search, Notify, Previous tab, Next tab, Refresh, Add, Update/Display, and Include History.

Step	Action
------	--------

- |     |   |
|-----|---|
| 6.  | Click the <b>Plus (+) key</b> in the <b>Name</b> section to add a new row.<br> |
| 7.  | Enter the effective date of the change into the <b>Effective Date</b> field.  |
| 8.  | Click the drop down arrow to select from the <b>Format Type</b> list.<br>      |
| 9.  | Click the <b>English</b> list item.<br>  |
| 10. | Click the <b>Edit Name</b> link.<br>   |



English Name Format

Prefix:

First Name: Susan Middle Name: L

Last Name: Smith

Suffix:

Display Name: Susan Smith

Formal Name: Susan Smith

Name: Smith,Susan L

OK Cancel Refresh

Step	Action
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11.	Click the drop down arrow to select from the <b>Prefix</b> list.
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12.	Click the appropriate item in the <b>Prefix</b> list
-----	--

Mrs

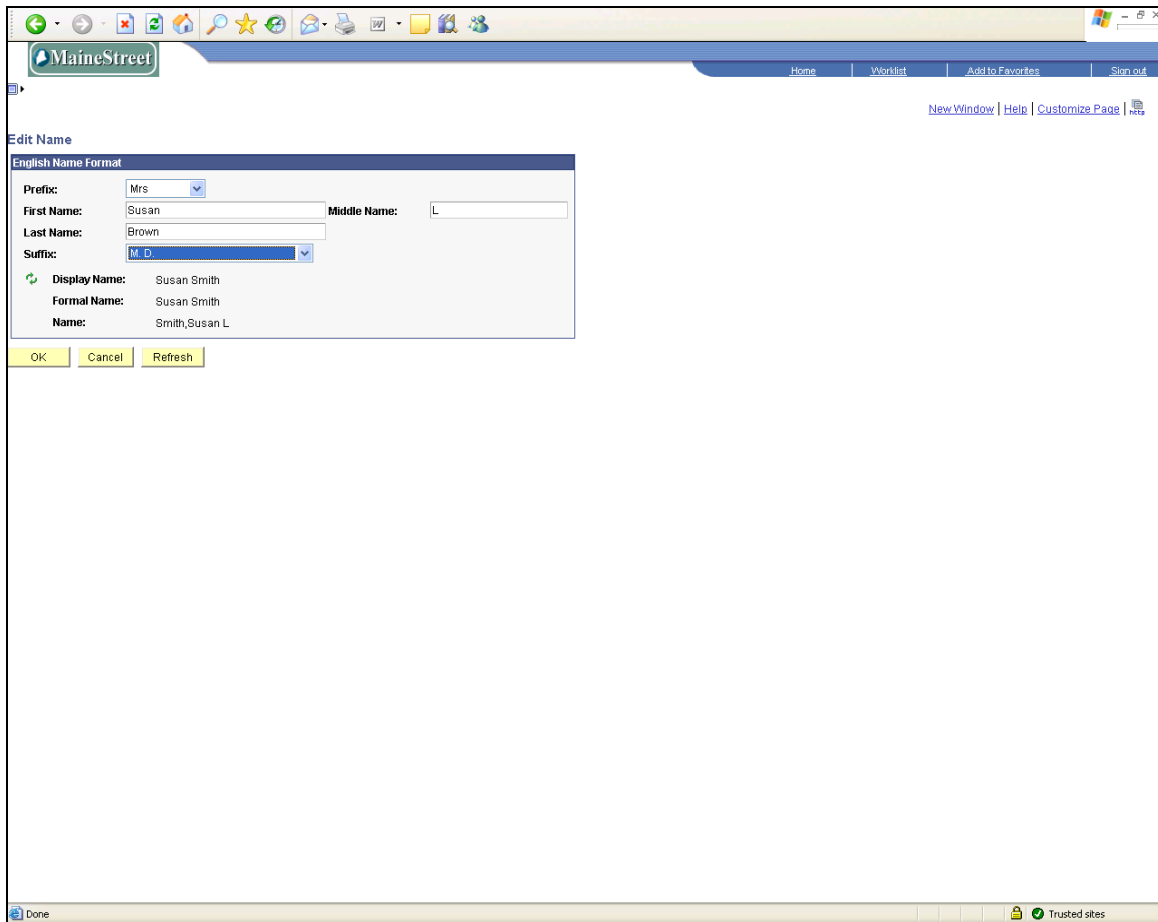
13.	Enter the new last name into the <b>Last Name</b> field.
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14.	Click the drop down arrow to select from the <b>Suffix</b> list.
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15.	Click the appropriate item from the <b>Suffix</b> list.
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M. D.



**Edit Name**

English Name Format

Prefix: Mrs

First Name: Susan Middle Name: L

Last Name: Brown

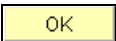
Suffix: M. D.

Display Name: Susan Smith

Formal Name: Susan Smith

Name: Smith,Susan L

OK Cancel Refresh

- | Step | Action                      |
|------|-----------------------------|
| 16.  | Click the <b>OK</b> button. |
- 

# Process Document HRMS: Name Change



The screenshot shows the MaineStreet HRMS interface. At the top, there is a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below this, there are tabs for 'Biographical Details', 'Contact Information', and 'Regional'. The main content area displays the following information:

**Name:** Susan Brown **Person ID:** 0099999

**Effective Date:** 08/01/2009 **Format Type:** English **Display Name:** Susan Brown [Edit Name](#)

**Biographic Information:**

**Date of Birth:** 02/06/1949 **60 Years 6 Months** **Date of Death:**

**Birth Country:** USA **United States**

**Birth State:**

**Birth Location:**  **Waive Data Protection:**

**Biographical History:**

**Effective Date:** 08/27/2003 **Gender:** Female **Highest Education Level:** C-HS Graduate or Equivalent **Marital Status:** Married **As of:** 08/19/1985

**Language Code:**  **Alternate ID:**   **Full-Time Student**

**National ID:**

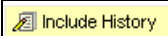
Country	National ID Type	National ID	Primary ID
USA	Social Security Number	005-48-9999	<input checked="" type="checkbox"/>

Buttons: [Save](#), [Return to Search](#), [Notify](#), [Previous tab](#), [Next tab](#), [Refresh](#), [Add](#), [Update/Display](#), [Include History](#)

## Step

## Action

17. To review Name History, Click the **Include History** button.



18. To review Name History, Click the **View All** link.





# Process Document HRMS: Name Change

The screenshot shows a web application interface for 'MaineStreet'. The main content area is titled 'Biographical Details' and contains the following information:

- Person ID:** 0099999
- Name Section:** A table with 3 rows. Each row has columns for 'Effective Date', 'Format Type', and 'Display Name'.
  - Row 1: Effective Date: 08/01/2009, Format Type: English, Display Name: Susan Brown. Includes a 'View Name' link.
  - Row 2: Effective Date: 01/01/2009, Format Type: English, Display Name: Susan Smith. Includes a 'View Name' link.
  - Row 3: Effective Date: 08/19/1985, Format Type: English, Display Name: Susan Jones. Includes a 'View Name' link.
- Biographic Information:** Fields for Date of Birth (02/08/1949), Birth Country (USA), Birth State, Birth Location, and Wave Data Protection.
- Biographical History:** Fields for Effective Date (08/27/2003), Gender (Female), Highest Education Level (C-HS Graduate or Equivalent), Marital Status (Married), As of (08/19/1985), Language Code, and Alternate ID.
- National ID Table:**

Country	National ID Type	National ID	Primary ID
USA	Social Security Number	005-48-9999	<input checked="" type="checkbox"/>

Navigation buttons at the bottom include Save, Return to Search, Notify, Previous tab, Next tab, Refresh, Add, Update/Display, and Include History.

## Step Action

19. Click the **View 1** link to collapse the **Name** section.

[view 1](#)

# Process Document

## HRMS: Name Change



[Home](#) | [Worklist](#) | [Add to Favorites](#) | [Sign out](#)  
[New Window](#) | [Help](#) | [Customize Page](#)

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

Susan Brown Person ID: 0012709

**Name** Find | View All | First 1 of 1 | Last  
 Effective Date: 08/01/2009  
 Format Type: English  
 Display Name: Susan Brown [View Name](#)


**Biographic Information**  
 Date of Birth: 02/06/1949 60 Years 6 Months Date of Death:  
 Birth Country: USA United States  
 Birth State:  
 Birth Location:   Waive Data Protection

**Biographical History** Find | View All | First 1 of 1 | Last  
 Effective Date: 08/27/2003  
 Gender: Female  
 Highest Education Level: C-HS Graduate or Equivalent  
 Marital Status: Married As of: 08/19/1985  
 Language Code:  
 Alternate ID:  Full-Time Student

Country	National ID Type	National ID	Primary ID
USA	Social Security Number	005-48-9999	<input checked="" type="checkbox"/>

[Save](#) [Return to Search](#) [Notify](#) [Previous tab](#) [Next tab](#) [Refresh](#) [Add](#) [Update/Display](#) [Include History](#)

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

- | Step | Action   |
|------|--|
| 20.  | Click the <b>Save</b> button.<br> |
| 21.  | <b>End of Procedure.</b>   |