

# Viewing and Changing Personal Information in UltiPro

The **Personal** section in **UltiPro** contains personal information - name, address, telephone, and key employee dates. You can view all the information here and submit changes to name, address, and telephone.

#### UltiPro Home page

Click *Menu* to display the entire list of information tabs and pages available to you.

MENU	a starter and		Jeff Skipper ▼   To Do   Help   Logout
			Find
<b>Jeff Skipper</b> Func Business Analyst	To Do There are no to dos.	Inbox Name, Adad and Tele	ddress, Income Tax
		Pay He	story Direct Deposit

MENU	MYSELF		Main Menu
Home	Personal Employee Summary Name, Address, and Telephone Status/Key Dates Private Info My Company Company Info Electronic Forms Organization Chart UltimateSoftware.com Jobs Job Summary Compensation Pay Current Pay Statement Pay History YTD Summary Direct Deposit Income Tax	Time & Attendance Benefits Gurrent Benefits Beneficiaries/Dependants PTO Plans Links Documents Employee Documents	To go to the <b>Personal</b> area click <b>Personal</b> , or click one of the subpages to go directly to a page within <b>Personal</b> . For this demonstration we will click <b>Personal</b> .



## Personal Tab - Employee Summary

The first page on the **Personal** tab – **Employee Summary** – is displayed. This page is a summary of all your personal information – name, employee number, home address, division, location, seniority, last hired date, job name, pay group, employee type and supervisor.

MENU Myself ▼ Personal	THE THE AVERAGE	Jeff Skipper ▼   To Do   Help   Logout
Employee Summary Name, Address, and Telephone	Status/Key Dates Private Info	Find
Jeff Skipper Func Business Analyst (416) 111-1111		B C C Things I Can Do FOR THES TAB SET Change Name, Address, or Telephone Add Alternate Phone Number
Personal Information		Quick Tours and Tips
Name Jeff Skipper Preferred	Corporate e-mail Alternate e-mail	UltiPro Navigation Overview Personal Section Overview Human Resources – Resources for Employees
Jeff Employee number 0000007	Mailstop Home Phone (416) 111-1111	
Time clock Address	Work Phone (403) 555-5555	

- 1. The Personal pages you can access are listed in the navigation bar at the top. The black area indicates we are on the **Employment Summary** page.
- 2. Scroll down to see more of the **Employee Summary** page.
- 3. Things I Can Do describes actions you can take in this tab area or this particular page. Click an action to go directly to that change area.
- 4. Quick Tours and Tips shows documents to help you use the UltiPro site. Note that these are not specific to the Salvation Army use of UltiPro.



# Personal Tab - Name, Address, and Telephone

On the menu bar, click **Name, Address and Telephone** to display your name, personal address, personal telephone number and alternate phone numbers.

Employee Summary	Name, Address, and Telephone	Status/Key Dates	Private Info			
Name, Addı	ress, and Telephone	2			edit   E	) help
Name	Jeff Skipper		Home Phone	(416) 111-1111 (Private)		
Preferred	Jeff		Work Phone	(403) 555-5555		
Marital status	None		Work extension			
Address	2 48th St.SW Calgary, AB T3T 1T1 Canada		Corporate e-mail			
Alternate Phone Num	bers					
Туре 🐣	Phone	Extension	Country	Country Prefix	Private	¥
Home	(403) 555-5556		Canada		$\checkmark$	

1. You can print the document or select **Edit** to make changes.

Employee Summary	Name, Address, and Telephone	Status/Key Dates	Private Info			
Change Nar	ne, Address, or Tele	ephone			save cancel pr	rint help
Effective	12/13/2016 🛗 🛁		Preferred first	Jeff		~
Prefix	$\checkmark$		Marital status	None 🗸		
First	• Jeff					- 11
Middle						- 41
Last	Skipper					
Address						
Quick Address Search 📀						
Country	• Canada 🗸					
Address	• 2 48th St.SW					

When **Edit** is selected the fields open for editing. Scroll down to see all fields. Once all changes are made, click **Save**. This action will show in your **Inbox** (To Do list) as a pending action waiting for approval from Human Resources.



# Personal Tab - Status/Key Dates

Click **Status/Key Dates**. This page displays your employment status, payroll status, employment dates, retirement dates, and benefit seniority dates.

Employee Summary	Name, Address, and Telephone	Status/Key Dates	Private Info		
Status and K	ey Dates				print help >
					^
Employment Stat	tus		Payroll Status		
Status	Active		Pay suspended	No	
As of	10/20/2016		Start		
			End		•
Employment Date	28				
Original hire	10/20/2016				
Last hire	10/20/2016				
Job start	10/20/2016				
Seniority	10/20/2016				

## Personal Tab - Private Information

Click **Private Info**. This page lists personal information - SIN, date of birth, age and gender.



When you have finished with the pages of the Personal tab:

- 1. Click *menu* to select another tab or page to work on.
- 2. Click the *Salvation Army* logo to return to the **home** page.
- 3. Click *Logout* to exit the UltiPro system.