Change Contact Information on Workday HTML Accessible Version

1. Entering Contact Information for the First Time

From the Home page, select the link **Related Actions.** In our example this would be the second link after the link **Jane Smith (W2005499)[C]** located at the top menu before the link **Change Password** (Replace Jane Smith with your name)**.** Link **Jane Smith (W2005499)[C]** link **Related Actions for Jane Smith (W2005499)[C]** link **Preview for Jane Smith (W2005499)[C].** Selecting the worker related actions link will display all possible actions you can perform (related to your role). Note: This screen contains a lengthy list of links.

Related Actions for Contingent Worker

Task Category 1 Business Process Task Group 1 - Business Process
Link **Manage Delegation Settings**
Link **My Delegations**
Link **Reassign Tasks**
Link **View Roles for Worker**
Link **View Security**
View **Skipped Tasks**

Organization Task Group 1 - Organization
Link **View Roles for Worker**

Payee Task Group 1 – Payee
Link **Assign Tax Authority Form Type**

Personal Data Task Group 1 - Personal Data
Link **Change Contact Information**
Link **Change Emergency Contacts**
Link **View My Emergency Contacts**
Link **View My Primary Address Changes**

Task Group 2 - Personal Data
Link **Change My Personal Information**
Link **Edit Personal Information**
Link **View My Personal Information**
Link **Change My Photo**
Link **Delete Photo**
Link **Change My Legal Name**
Link **Edit Photo**
Link **Change My Preferred Name**

Task Group 3 - Personal Data
Link **View My ID Information**

Task Group 4 - Personal Data
Link **Delete My Photo**

Talent Task Group 1 – Talent
Link **View Skills and Experience**

Workday Account Task Group 1 - Workday Account

Link **Change My Password**
Link **Manage Password Challenge Questions**

Worker History Task Group 1 - Worker History
Link **View Worker History**
Link **View Worker History by Category**

Task Group 2 - Worker History
Link **Maintain Worker Documents**
Link **View Manager History**

Task Group 3 - Worker History
Link **View My Service Dates**
Link **Edit System ID**

Task Category 2 Favorite Task Group 1 - Favorite
Link **Add**

Integration IDs Task Group 1 - Integration IDs
Link **View IDs**

Preferences Task Group 1 - Preferences
Link **View Preferences**

Task Group 2 – Preferences
Link **Edit Preferences**

Security Profile Task Group 1 - Security Profile
Link **View Workday Account**

Task Group 2 - Security Profile Assign Roles
Link **View Role Assignments**
Link **Security History for User**
Link **View Support Roles**

Select link **Change Contact Information** located under Personal Data Task Group 1 - Personal Data, this will display:

Change Contact Information
Employee Self-Service Users: If you are a State Health Benefits participant, updates entered on this page will be shared with DBM Employee Benefits Division. You do not need to submit your changes directly to DBM Employee Benefits Division. If you live in the state of Maryland, entry in the County field is required and must exactly match one of the following values: (please note, the field is case-sensitive)

Allegany
Anne Arundel
Baltimore
Baltimore City
Calvert
Caroline
Carroll
Cecil

Charles
Dorchester
Frederick
Garrett
Harford
Howard
Kent
Montgomery
Prince George's
Queen Anne's
St. Mary's
Somerset
Talbot
Washington
Wicomico
Worcester

If you live in the District of Columbia, please enter District of Columbia in the State field. No entry in County is required.
If you live in any other state, please enter your County of residence, if applicable.

Link **Jane Smith (W2005499)[C]** link **Related Actions for Jane Smith (W2005499)[C]** link **Preview for Jane Smith (W2005499)[C]**

Review your contact information and enter any changes or additions.

Home Contact Information Primary Address link **Edit Primary Address**
Additional Address link **Edit Additional Address**
Primary Phone link **Edit Primary Phone**
Additional Phone link **Edit Additional Phone**
Primary Email link **Edit Primary Email**
Additional Email link **Edit Additional Email**
Work Contact Information Business Location link **View Business Location**
Primary Work Address Usage Text link **View Primary Work Address Usage Text**
Alternate Work Location link **Edit Alternate Work Location**
Additional Address link Edit **Additional Address**
Primary Phone link **Edit Primary Phone**
Additional Phone link **Edit Additional Phone**
Primary Email link **Edit Primary Email**
Additional Email link **Edit Additional Email**
Primary Instant Messenger link **Edit Primary Instant Messenger**
Additional Instant Messenger link **Edit Additional Instant Messenger**
Primary Web Address link **Edit Primary Web Address**
Additional Web Address link **Edit Additional Web Address**

Button **Proceed to Submit Changes**

To edit any of the applicable contact information fields, select the link you wish to edit. We will use the Primary Address as an example:

Select Link **Edit Primary Address** located at the first link under the heading Home Contact Information, this will display:

Edit Primary Home Address Active View.

A table will display with Columns headers: button **Add Row**, Address, Usage, and Visibility.

Select button **Add Row**, this will display:

Add Row for Edit Primary Home Address Active View page

Address: New Address
Effective Date: text inputs **Year**, **Month**, **Day** button **Validate**
Country (required): button **Select Country**
United States of America link **Remove United States of America**

Text input **Address Line 1 (required):** button **Validate**
Text input **Address Line 2:** button **Validate**
Text input **City (required):** button **Validate**
Text input **State (required):** button **Select State**
Text input **Postal Code (required):** button **Validate**
Text input **County:** button **Validate**
Usage: button **Select Usage**
Drop-down **Visibility (required):**
Details, Text input Notes:
Buttons **OK, Cancel**

There is no need to change the Country; it is pre-populated with United State of America with a link to remove it.

* Note * You may have displayed 4 extra fields, 2 at the top of the form: text input **Address** and checkbox **False** and 2 fields at the bottom of the form checkbox **Soft Delete** and **Soft Delete Enabled**. These fields are not required, do not function and will not display after you submit the form or when you edit it later. In addition as you enter information the order the fields may move their order or position on the page.

For out example:
Enter the Effective Date (this is pre-populated with the current date, so you do not have to edit unless needed) text inputs **Year** "2015", **Month** "08", **Day** "25".
Select the button **Validate** if you changed the date.

Enter into text field **Address Line 1 (required)** "311 West Preston Street". Select the Validate button, if you do not select the button **Validate** you will receive a message window that will display: The change you made to the field 'Address Value' requires validation. Please click the 'validate' button. Button **OK** (after message), button **Close** (before message).

Enter into text field **City (required)** "Baltimore", Select the button **Validate**.
Enter into text field **Postal Code (required)** "21201", Select the button **Validate**.
Select the Usage button, this will display:
If you live in a county enter that into text input field **County**.

Select button **Usage,** this will display:

Select value for Usage

Text input **Search**, button **Search**

Allowed Usages

Checkboxes:
Mailing
Mileage Calculation
Other - Home
Paycheck
Payroll Tax Form
Permanent
Shipping

Street Address

Buttons **Add**, **Cancel**

We will select checkbox list item Mailing for this example.
Select the button **Add**.

As you add information to the form, the form will update within the form the information you have entered. Some of the fields will move to the top of the form in this update process.

Select the drop-down **Visibility**. We will select Public from the drop-down list.

You can add any notes as an option in the textbox **Notes:**

Select the button **OK**.

Once submitted this will display:

Button Add Row
Button Edit
Address: 311 West Preston Street, Baltimore, MD 21201
Usage: Mailing
Visibility: Public

Select the button **Done**.

Complete any other contact information in the same manner as the example
.
If you wish to edit any information you previously entered select the button **Edit** on the row in the view table. In our example that would be located in the Edit Primary Home Address Active View from selecting the link **Edit Primary Address** on the Change Contact Information page.

2. Submitting Contact Information

When complete select the button **Proceed to Submit Changes**, this will display:

Review This Task, Review this Task
Textbox Input Comment button **Validate**
Buttons **Submit**, **Save for Later**, **Cancel**

A comment is not required.
Select the button **Submit**, this will display (depending on how many changes you made and if errors were made):

You have submitted: link **Contact Change: Jane Smith (W2005499)[C]** link **Related Actions for Contact Change: Jane Smith (W2005499)[C]** link **Preview for Contact Change: Jane Smith (W2005499)[C]**
Page was saved successfully
Process Successfully Completed
Do Another: link **Change My Contact Information**

Details and Process
For: link **Jane Smith (W2005499)[C]** link **Related Actions for Jane Smith (W2005499)[C]** link **Preview for Jane Smith (W2005499)[C]**
Overall Process: link **Contact Change: Jane Smith (W2005499)[C]** link **Related Actions for Contact Change: Jane Smith (W2005499)[C]** link **Preview for Contact Change: Jane Smith (W2005499)[C]**
Overall Status: Successfully Completed
Due Date: 08/28/2015
Details button **View Details**
Process

Link **Export 'Process History' items to Excel**
Process History (table)
Process: link **Contact Change** link **Related Actions for Contact Change** link **Preview for Contact Change**
Step: link **Contact Change** link **Related Actions for Contact Change** link **Preview for Contact Change**
Status: Step Completed
Completed On: 08/26/2015 08:56:52 AM
Due Date: 08/28/2015
Person: link **Jane Smith (W2005499)[C]** link **Related Actions for Jane Smith (W2005499)[C]** link **Preview for Jane Smith (W2005499)[C]**
Comment: (blank)
Preview for Contact Change
Button **Done**

Select the button **Done**, this will return you to the Workday Home page.

3. How to Edit or Delete Contact Information

The process is similar to entering Contact Information for the first time, here are the steps in brief:

From the Home page, select the link **Related Actions** after you name link**,** this will take you to the Related Actions for Contingent Worker page.
Select link **Change Contact Information** located under Personal Data Task Group 1 - Personal Data
Select the information you wish to edit, if in our example we needed to correct the Primary Address, we would select the link **Edit Primary Address** located at the first link under the heading Home Contact Information
On the Edit Primary Home Address Active View page select the link **Edit Row for 311 West Preston Street, Baltimore, MD 21201.** You may also delete the record with the link **Remove Row for 311 West Preston Street, Baltimore, MD 21201** which is located after the link **Edit Row for 311 West Preston Street.**
Make your edits on the Edit Row for Edit Primary Home Address Active View page.
Select button **OK**, when complete.
Select button **Done** on the Edit Primary Home Address Active View.
This will return you to the Change Contact Information page, select button **Proceed to Submit Changes**.
The next page will be Review This Task, if you have no comment to add, Select button **Submit.**
The button Submit will take you to an Event Saved or You Have Submitted page (depending on the type of edits you did), this may have further information for and errors or steps required to complete the editing. Select the button Done. If there are issues a task will be added to your Inbox. Selecting button Done will return you to the Related Actions for Contingent Worker page.

Return to the Inbox to see the status of your changes and any actions that may be required.

Last Updated 8/27/2015