How to Enter Emergency Contact with the Workday HTML Accessible Version

1. **Entering Emergency Contact for the First Time**

From the Home page, select the link **Personal Information** under the heading Home**.**
Select the link **Emergency Contacts** under the heading Change.

If this is your first time on this page, the following text will be displayed:

My Emergency Contacts: Jane Smith (W2005499)[C] **Link Related Actions for Jane Smith (W2005499)[C]** Link **Preview for Jane S Smith (W2005499)[C]** button **Add** (none entered)

Select the button **Add located** before none entered. Once selected you will have the following displayed:

Change My Emergency Contacts
Link **Jane Smith (W2005499)[C]** link **Related Actions for Jane Smith (W2005499)[C]** link **Preview for Jan Smith (W2005499)[C]**

Heading Primary Emergency Contact
Legal Name link **View Legal Name**
Relationship link **View Relationship**
Preferred Language link **View Preferred Language**
Primary Address link **View Primary 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 **View Primary Instant Messenger**
Primary Web Address link **View Primary Web Address**
Heading Alternate Emergency Contacts
Alternate Emergency Contacts link **Edit Alternate Emergency Contacts**
Button **Proceed to Submit Changes**

In each of the fields that apply enter the information by way of this example of entering the Legal Name:

Select the first link **View Legal Name** under the heading Primary Emergency Contact**.** The following will display:

Edit Legal Name for Role Active View
Your attention is required.
The issues below need to be fixed to prevent data entry errors.
• Severity:
Critical
Problem/Solution: Name is required
Button **Legal Name**

Select the button **Edit Row for Item 1,** the following screen will display:

Edit Row for Edit Legal Name for Role Active View page
Name: (blank)
Country (required): Button **Select Country**
United States of America link **Remove United States of America**

Prefix: button **Select Prefix**

Text Input field **First Name (required):** button **Validate**

Text Input field **Middle Name:** {text Input Field} button **Validate**

Text Input field Last Name (required): button **Validate**

Suffix: button **Select Suffix**

Details

Buttons **OK, Cancel**

The Country field is pre-filled with "United States of America", so select button **Prefix**, the screen will display:

Select Value for Select

Text input Search and button **Search**

All

Radio buttons for each item follows:

Dr.

Fr.

H.

Miss

Mr.

Mrs.

Ms.

Prof.

In this example radio button "Dr." was selected.

Once a Prefix selection is made, select button **Add** from the buttons **Add** and **Cancel** located after the list of radio button prefix choices. This will return you to the Edit Row for Edit Legal Name for Role Active View page.

"Dr." will be added to the screen display following the button **Prefix. "Dr."** will be followed by link **Remove Dr.**

Enter "John" into the text input field **First Name.** Select the button **Validate** which follows the First Name field.

* Note: If you exit the First Name field and do not immediately select the Validate button, you will get a pop-up message: "The change you made to the field 'Person Name Value' requires validation. Please click the 'validate' button." You may close this window with the buttons **Close** (before the message) or **OK** (after the message)**.** This will be true for any field that has a Validate button.

Enter "Sully" into the text input field **Middle Name.** Select the button **Validate** which follows the Middle Name field.

Enter "Smith" into the text input field **Last Name.** Select the button **Validate** which follows the Last Name field.

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

Select Value for Select

Text input Search and button **Search**

All

Radio buttons for each item follows:

I

II

III

IV

Jr.

Sr.

V

VI

In this example radio button "Jr." was selected.

Once a Suffix selection is made, select button **Add** from the buttons **Add** and **Cancel** located after the list of radio button Suffix choices. This will return you to the Edit Row for Edit Legal Name for Role Active View page.

"Jr." will be added to the screen display following the button **Suffix.** "Jr." will be followed by link **Remove Jr.**

You have completed the Legal Name fields, to submit the form select the button **OK** or the button **Cancel** to cancel the entire form. When the button **OK** is selected it will display:

Edit Legal Name for Role Active View
(The legal name will be formatted in a table)
Legal Name
Button **Edit Row for John Smith**
John Smith
Button **Done**

You can edit the name again to make any corrections by selecting the Button **Edit Row for John Smith** or you can select the button **Done,** this will display the Change My Emergency Contacts page. You may return to the Button **Edit Row for John Smith** by selecting the link **View Legal Name** under the heading Primary Emergency Contact again if you wish to make any changes.

Do these actions for each applicable item in the Primary Emergency Contact and the Alternate Emergency Contacts

When all applicable fields are completed 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, and Cancel

A comment is not required.
Select the button **Submit,** this will display:

You have submitted: Change Emergency Contacts: Jane S. Smith (W2005499) - DJS Analyst link **Related Actions for Change Emergency Contacts: Jane S. Smith (W2005499) - DJS Analyst** Link **Preview for Jane S Smith (W2005499)[C]**
Page was saved successfully

Process Successfully Completed

Do Another: link **Change My Emergency Contacts**

Details and Process
For:
Link **Jane S. Smith (W2005499) - DJS Analyst** link **Related Actions for Change Emergency Contacts: Jane S. Smith (W2005499) - DJS Analyst** Link **Preview for Jane S Smith (W2005499)[C]**

Overall Process:

Change Emergency Contacts: Jane S. Smith (W2005499) - DJS Analyst link **Related Actions for Change Emergency Contacts: Jane S. Smith (W2005499) - DJS Analyst** Link **Preview for Jane S Smith (W2005499)[C]**
Overall Status: Successfully Completed
Details
Button **View Details**

Process
Link **Export 'Process History' items to Excel**
Process History (table)
Process: Change Emergency Contacts link **Related Actions for Change Emergency Contacts**
Step: Change Emergency Contacts link **Related Actions for Change Emergency Contacts**
Status: Step Completed
Completed On: 08/24/2015 02:08:54 PM
Due Date: (blank)
Person: Link **Jane S. Smith (W2005499) - DJS Analyst** link **Related Actions for Change Emergency Contacts: Jane S. Smith (W2005499) - DJS Analyst** Link **Preview for Jane S Smith (W2005499)[C]**
Comment: (blank)

Button **Done**.

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

2. Editing Existing Emergency Contact Information

From the Home page, select the link **Personal Information** under the Home heading.
Select the link **Emergency Contacts** under the Change heading, this will display (using our example):

My Emergency Contacts: Link **Jane S. Smith (W2005499) - DJS Analyst** link **Related Actions for Change Emergency Contacts: Jane S. Smith (W2005499) - DJS Analyst** Link **Preview for Jane S Smith (W2005499)[C]**

Button **Edit**
Link **Export 'Process History' items to Excel**
(Contact list is in table format, some columns are blank as we only completed the legal name in our example)

Priority: 1
Emergency Contact: link **John Smith** link **Related Actions for John Smith** Link **Preview for John Smith**
Relationship: (blank)
Preferred language: (blank)
Primary Contact Information: (blank)
Alternate Contact Information: (blank)

Use the **Edit** button to edit an existing Emergency Contact. To edit an existing Emergency Contact such as our example John Smith, select the button **Edit**, this will display the Change My Emergency Contacts page.

To Change the Legal Name that we entered in our Example "John Smith", Select the link **View Legal Name**, the first link under the heading Primary Emergency Contact, this will display:

Edit Legal Name for Role Active View.
(The legal name will be formatted in a table)
Legal Name
Button **Edit Row for John Smith**
John Smith
Button **Done**

Selecting the Button **Edit Row for John Smith,** this will display the Edit Row for Edit Legal Name for Role Active View page. This is the screen where you can change: Country, Prefix, First Name, Middle Name, Last Name, and Suffix.
When you are done editing, Select the button **OK** or button **Cancel.**

3. Saving For Later

From the Home page, select the link **Personal Information** under the Home heading**.**
Select the link **Emergency Contacts** under the Change heading, this will display My Emergency Contact page.

Select the button **Edit,** this will display the Change My Emergency Contacts page.

Edit or Add to any of the fields

When finished editing, select the button Proceed to Submit Changes, this will display the Review This Task page where you can add a comment and Submit the changes.

Select the button **Save for Later** located after the **Submit** button at the bottom of the page, this will display:

Event saved. Awaiting submission: Change Emergency Contacts: Jane S. Smith (W2005499) - DJS Analyst link **Related Actions for Change Emergency Contacts: Jane S. Smith (W2005499) - DJS Analyst**

Page was saved successfully

Next Steps

Button **Revise**

Detail: Revise Emergency Contact Event For: Link **Jane S. Smith (W2005499) - DJS Analyst** link **Related Actions for Change Emergency Contacts: Jane S. Smith (W2005499) - DJS Analyst** Link **Preview for Jane S Smith (W2005499)[C]**

Do Another: link **Change My Emergency Contacts**

Details and Process

For: Link **Jane S. Smith (W2005499) - DJS Analyst** link **Related Actions for Change Emergency Contacts: Jane S. Smith (W2005499) - DJS Analyst** Link **Preview for Jane S Smith (W2005499)[C]**

Overall Process:

Change Emergency Contacts: Link **Jane S. Smith (W2005499) - DJS Analyst** link **Related Actions for Change Emergency Contacts: Jane S. Smith (W2005499) - DJS Analyst**

Overall Status: In Progress

Details

Button **View Details**

Process

Link **Export 'Process History' items to Excel**

Process History (table)

Process: Change Emergency Contacts Link **Related Actions for Change Emergency Contacts**

Step: Change Emergency Contacts Link **Related Actions for Change Emergency Contacts**

Status: Saved for Later

Completed On: 08/25/2015 07:49:33 AM

Due Date: (blank)

Person: Link **Jane S. Smith (W2005499) - DJS Analyst** link **Related Actions for Change Emergency Contacts: Jane S. Smith (W2005499) - DJS Analyst** Link **Preview for Jane S Smith (W2005499)[C]**

Comment: (blank)

Button **Done**.

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

To continue editing your Emergency Contact that was Saved for Later, select your link **Inbox** located in the top navigation menu.

* Note *   If you try to use the step in heading 2, Editing Existing Emergency Contact Information and select the **Edit** to attempt continue editing your Emergency Contact, the Change My Emergency Contacts page will have a message on the screen: "You cannot initiate this action because there are other pending or completed actions for the person that conflict with this one. Close or cancel the pending actions or rescind the completed actions listed below. This edits cannot be executed from here you must return to the Inbox to Revise the Emergency Contact."

In your Inbox there is a My Tasks table as the first table on the page, this table will contain for our example 1 task:

Awaiting Me: Button **Revise**
Business Process: Change Emergency Contacts: Jane S. Smith (W2005499) - DJS Analyst link **Related Actions for Change Emergency Contacts: Jane S. Smith (W2005499) - DJS Analyst**
Subject: Link **Jane S. Smith (W2005499) - DJS Analyst** link **Related Actions for Jane S. Smith (W2005499) - DJS Analyst** Link **Preview for Jane S Smith (W2005499)[C]**
Due Date: (blank)
Date Received: 08/25/2015 07:49:33 AM
Button: **Delete**

Select the **Revise** button, this will display:

Revise Emergency Contact Event
Change Emergency Contacts: Jane S. Smith (W2005499) - DJS Analyst link **Related Actions for Change Emergency Contacts: Jane S. Smith (W2005499) - DJS Analyst**

From here you can edit any Emergency Contact information.

4. Deletions

If you wish to delete an Emergency Contact there is no direct method.at this time, however there is workaround to achieve deletion of the information contained in the Emergency Contact.

The Edit Method:
If you have a different Emergency Contact, you can edit the existing Emergency Contact and type over any of the information. Once saved that will replace the original record information you wanted to delete. Note that you cannot leave the required fields blank.

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