

## NAME CHANGE FOR CLASSIFIED STAFF WORK INSTRUCTIONS (CLS-W005)

### 1.0 SCOPE

- 1.1 This work instruction outlines the process of entering a requested name change.

The online version of this work instruction is official. Therefore, all printed versions of this document are unofficial copies.

### 2.0 RESPONSIBILITY

- 2.1 Classified Employment Representative

### 3.0 APPROVAL AUTHORITY

- 3.1 Human Resources Director

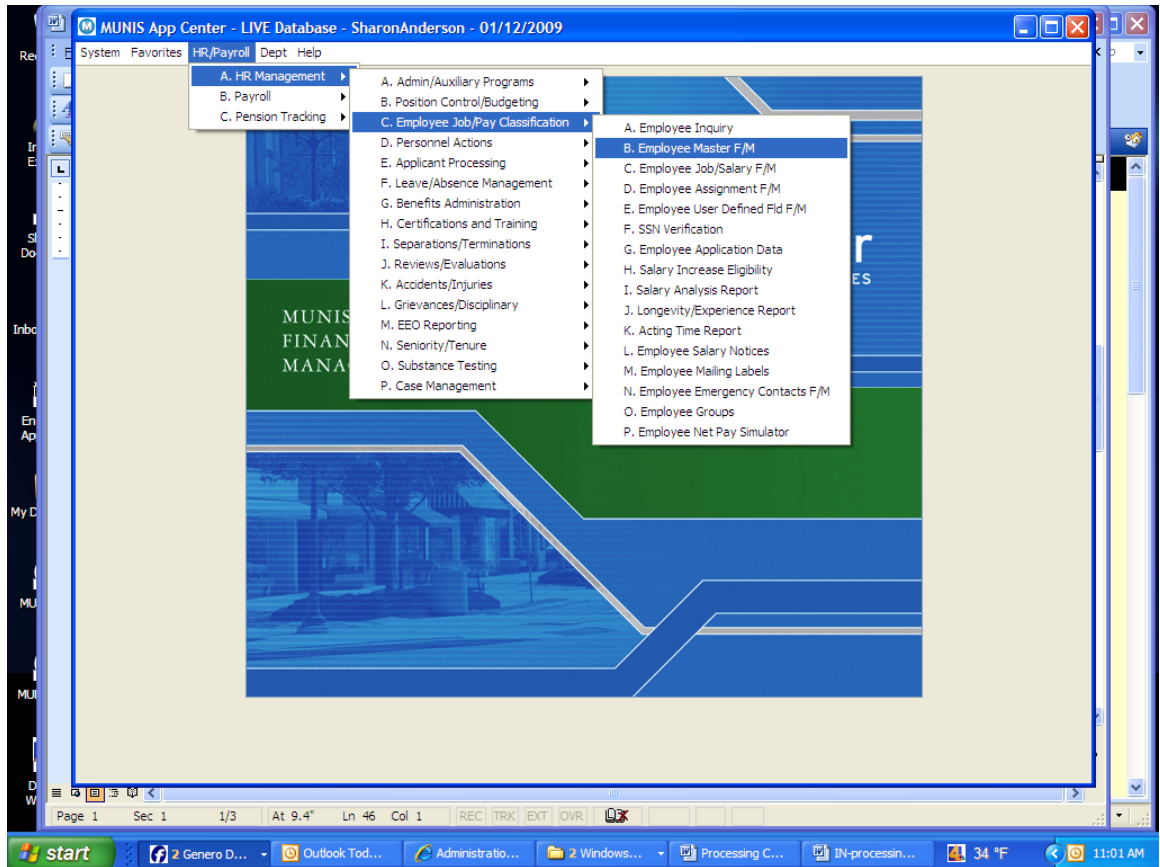
### 4.0 DEFINITIONS

- 4.1 MUNIS – Database

### 5.0 WORK INSTRUCTION: The workflow of processing a name change.

1. Classified employee provides the Classified Employment Representative a copy of the new social security card reflecting the new name
2. Copy the new social security card for the personnel file
3. Change the name in MUNIS under the address tab of the Employee Master
4. From your desktop, click on the MUNIS icon.
5. Enter your username you were provided in the first dialog box.
6. Enter your password you were provided in the second dialog box.
7. Once your username and password has been authenticated, the main application menu will be displayed.
8. Click on **HR/Payroll**. Choose **HR Management**, then **Employee Job/Pay Classification**, then **Employee Master F/M**.

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9. The Employee Master F/M screen will be displayed.

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The screenshot displays the 'Employee Master F/M - MUNIS [LIVE Database]' application window. The 'Address' tab is selected, showing fields for 'Line 1', 'Line 2', 'City', 'State', 'Zip', 'City Code', 'Home Phone', 'Email', 'Alt Email', 'Prior Name', 'FOIA Exempt', 'Supervisor', and 'Spouse'. The 'Employee' field at the top contains '...', 'SSN' contains '...', 'Last Name' contains '...', and 'First Name' contains '...'. The 'M' field is empty, 'Suffix' contains '...', and 'Status' contains '...'. The interface includes a menu bar (File, Edit, Tools, Help), a toolbar with various icons, and a sidebar with buttons like 'Detail', 'Terminate', 'Text', 'Reporting Empe', 'Org Chart', 'Supervisor', 'View History', and 'G/L Acct. Find'. The Windows taskbar at the bottom shows the Start button, several open applications, and the system tray with the date and time (10:25 AM).

10. Select the **binoculars** to search the person's last name or the employee number.
11. One the appropriate employee is located select the **Address Tab in the File Master**
12. Select the **pen and paper** to update.
13. Enter new last name and change *Address, City, State, Zip Code, and Home Phone*, if necessary
14. Add the old name to **Prior Name** area within the address tab
15. Update the contacts information if necessary
16. Click on Green Check in upper left hand corner.
17. Scan the new card and attach to the employee's MUNIS Employee Master (see Scanning and Attached to MUNIS File Master work instruction)
18. Select the red "X" in the upper right hand corner to exit out of the Employee Master
19. Make a new ID badge to reflect the new name and exchange it with the old badge (see Making an ID Badge work instruction)

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20. Send an e-mail to the Systems Administrator in the Technology Department of the name change (old name and new name) of a permanent employee so that the necessary changes can be made for e-mail purposes.
21. Send an e-mail to the benefits office to notify them of a address change if necessary, if they are a permanent employee
22. Refer the employee to the benefits office to make any necessary beneficiaries changes, if they are a permanent employee
23. Put a new label on the employee file to reflect the new name
24. File the personnel file alphabetically by the new last name in the active classified employee's files in the HR file room.

### 6.0 ASSOCIATED DOCUMENTS

1. New Social Security Card
2. ID badge
3. Personnel file

### 7.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
1/12/09		Initial Release
6/25/09	A	Add new 20 and renumber.

**\*\*\* End of Instruction \*\*\***