

Self Service: View And Update Your Personal Information in CMS Student/HR



All functions of CMS Student/HR for Self Service.

Review/Approval History

Date	By	Action	Pages
7 June 2005	M Galligan	Original	18
23 January 2006	M Galligan	Update to reflect software changes	18
30 January 2006	M Galligan	Update with portfolio info	29
24 April 2007	M Galligan	Update for release 8.9	25
17 May 2007	C Frakes	Added introductory table from another job aid. Added note about primary emergency contact error message for another job aid.	27
17 December 2008	C Frakes	Changed login information to MyCSUMB. Removed out-of-date note about Student Assistant Home Address on page 10. Cleaned up screen shots and Figure numbering.	1-23
29 July 2009	C Frakes	Removed login information. Changed branding to CMS Student/HR.	1-20
02 March 2012	A Marbach	Converted to new template and rebranded for v 9.0	20

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List of Self Service Functions

To use the Self Service functions in CMS Student/HR to change your own contact information, and review and enroll in training, follow these steps:

1. Login to the CMS Student/HR system.
2. From the main Menu select **MB Employee Self Service**.
3. Select the option you wish from the following list:
 - **Personal Information**
 - **Personal Information Summary**- View your personal information
 - **Names**- View and update your preferred name.
 - **Home Address**- Review and update your home and/or mailing (W-2) address.
 - **Phone Numbers**- Add or update phone numbers.
 - **Emergency Contact**- Add or update your emergency contact information.
 - **Email Address**- Add or update your email addresses.
 - **Training**
 - **Enrollment**- Enroll in a training course.
 - **Enrollment summary**- View a summary of your training information.
 - **Benefits**
 - **Healthcare Summary**- Review a summary of your healthcare enrollments.
 - **Healthcare Dependant Summary**- Review a summary of your healthcare dependents information
 - **Dependant Coverage**- Review a summary of your dependents benefits coverage.
 - **Dependant Info**- Review dependent information.
 - **Benefits Personal Data**- Update personal benefits-specific information.

NOTE: Student Assistants enter their hours worked using Time Management functionality in CMS Student/HR Self Service menu. For details about this functionality see the Job Aid titled "Student Assistant - Enter Time & Print Voucher," located at <M:\Technology Training\public\CMS HR\Student Assistant - Enter Time and Print Voucher.pdf>.

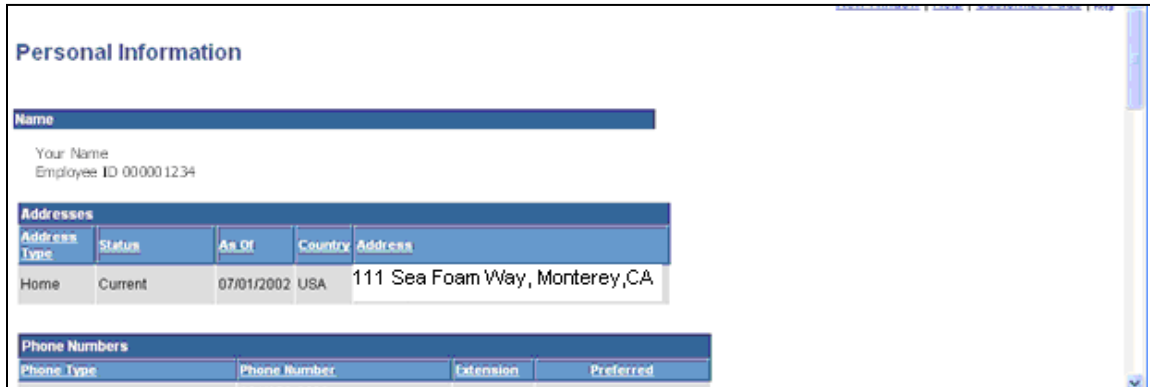
Personal Information Summary

Use Personal Information to:

- View your Employee ID
- View the Gender, Birth Date, Ethnic Group and Social Security Number stored in CMS Student/HR
- Update your address, telephone number, emergency contact information or preferred name

Navigation: MB Employee Self Service > Personal Information Summary

NOTE: Please contact University Human Resources if your gender, date of birth or social security number is wrong.



The screenshot displays a web interface titled "Personal Information". It features three main sections: "Name", "Addresses", and "Phone Numbers".

Name Section: Shows "Your Name" and "Employee ID 000001234".

Addresses Section: A table with columns: Address Type, Status, As Of, Country, and Address.

Address Type	Status	As Of	Country	Address
Home	Current	07/01/2002	USA	111 Sea Foam Way, Monterey, CA

Phone Numbers Section: A table with columns: Phone Type, Phone number, Extension, and Preferred.

Phone Type	Phone number	Extension	Preferred
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Figure 1: View Demographic Information

NOTE: Birth Country, Birth State and Citizenship data do not appear unless you are not a US citizen.

NOTE: Driver's License information does not appear unless it is a job requirement for you.

NOTE: Visa or Permit Data appears only where applicable.

Names

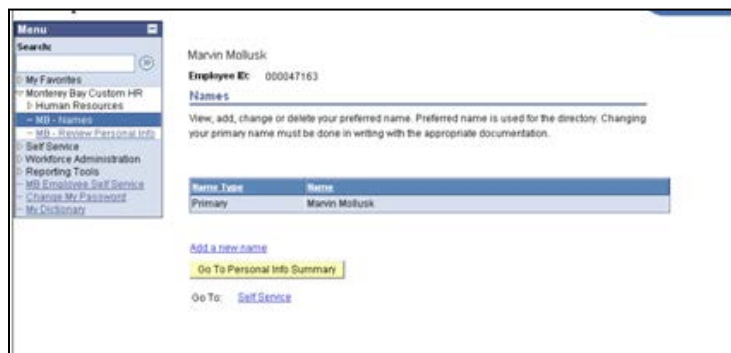


Figure 2: Current names (Primary)

Navigation: MB Employee Self Service > Personal Portfolio > Names

NOTE: Your Primary name is your name as it appears on your Social Security card. You will not have access to change your Primary name. If you need to change it, please contact Payroll staff.

1. To add a Preferred name, click on **Add a new name**.



Figure 3: Change Preferred Name

2. Change any of the fields shown on this panel:
 - **Prefix-** Ms., Mrs., Mr., Dr., etc.
 - **First Name-** Your preferred first name
 - **Middle Name-** Your preferred middle name
 - **Last Name-** Your preferred last name
 - **Suffix-** Jr., RN, etc.
 - **Date changes will take effect-** Date that new name takes effect

3. Click **Save**.

4. If you made a change, you will see the panel shown in Figure 4. Click **OK**.

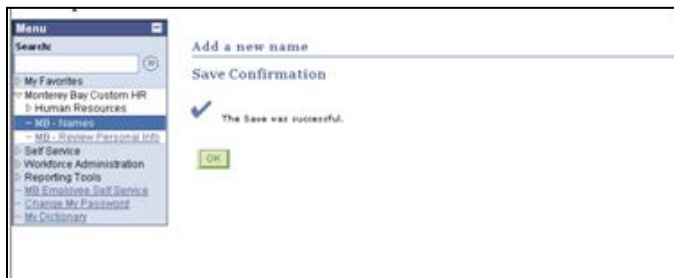


Figure 4: Confirmation of a successful save

Home Address

Home and Mailing Address

Marvin Mollusk

Address Type	Status	As Of	Country	Address	
Home	Current	02/01/2007	USA	1310 Foam Street Monterey, CA	Edit

*Address Type: [Add](#)

* Required Field

[Return to MR Employee Self Service](#)

Figure 5: Address displayed

Navigation: MB Employee Self Service > Personal Information > Home Address

All addresses on record for you will be displayed.

NOTE: Your home address is the address to which your W-2 will be sent. If this is not the correct address for your W-2 form, please email cmsquestions@csumb.edu so that your W-2 address can be updated in the system.

Change address

1. Click Edit to change your address.

[New Window](#) | [Help](#) | [Customize Page](#)

Edit Home Address

Country: United States [Change Country](#)

Address 1: 1313 Foam Street

Address 2:

Address 3:

City: Monterey State: CA California Postcode: 93940



County:

Date Change Will Take Effect:

On this date: 04/23/2007 (example: 01/31/2000)

[Save](#) [Cancel](#)

Figure 6: Make Changes and Save Address

2. Change any of the fields shown on this panel:
 - **Address 1**- Street address
 - **Address 2**- Continuation of street address or apartment number
 - **Address 2**- Continuation of street address or apartment number
 - **City**- City
 - **State**- State
 - **Postal**- ZIP code
 - **County**- County
 - **Date changes take effect**- Date that new address takes effect
3. Click .
4. If you made a change, you will see the panel shown in Figure 7. Click . If you did not make a change, click [Return to MB Employee Self Service](#)

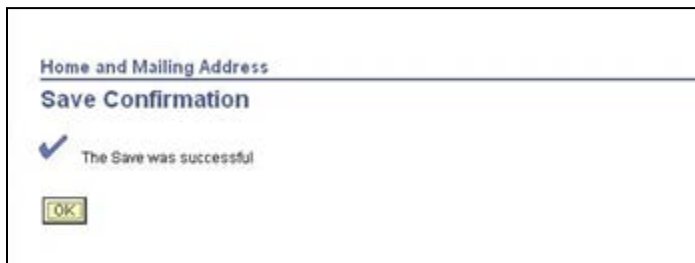


Figure7: Change confirmed

5. Click **Sign out** (in the top right corner) or a menu option.

Delete address

If you need to delete an address, email cmsquestions@csumb.edu to ask that your address be deleted. Payroll staff are able to delete your mailing address but not your home address, as the home address is the one to which your W-2 is sent.

Add address

Click Add to add a new address.

NOTE: If you add a Mailing address, you will not be able to delete it.

Phone Numbers



Figure 8: Current phone numbers

Navigation: MB Employee Self Service > Personal Portfolio > Phone Numbers

Add a phone number

1. To add a telephone number, click **Add a Phone Number**.
2. Select the Phone Type (e.g., Home)
3. Type in the telephone number, in a readable format (e.g., 831-555-5555).
4. Click the checkbox under **Preferred** if you have multiple contact numbers and this is the one you prefer to use.
5. Click **Save**.
6. Click **OK**.

Emergency Contacts



Figure 9: Add or Change Emergency Contact information

Navigation: MB Employee Self Service > Personal Portfolio > Emergency Contacts

Add an Emergency Contact

1. Click **Add an Emergency Contact** to add an Emergency Contact.

A screenshot of the 'Emergency Contact Detail' form for 'Marvin Mollusk'. The form is divided into sections: 'Address and Telephone', 'Address', 'Phone', and 'Other Telephone Numbers'. The 'Address and Telephone' section includes fields for 'Contact Name' (Molly Mollusk) and 'Relationship to Employee' (Spouse), with checkboxes for 'Contact has the same address as the employee' and 'Contact has the same telephone number as the employee'. The 'Address' section shows 'Country: United States' and 'Address: 1313 Foam Street, Monterey, CA 93940'. The 'Phone' section has a 'Telephone:' field. The 'Other Telephone Numbers' section has a table with columns 'Phone Type' and 'Phone Number', and an 'Add a Phone Number' button. A 'Save' button is at the bottom.

Figure 10: Add emergency contact information

2. Change any of the fields shown on this panel.
 - **Contact Name-** Name of emergency contact person
 - **Relationship-** Relationship to you (e.g., daughter for your daughter)
 - **Contact has the same-** Check this to fill in the contact's address and/or telephone information with your home address and/or telephone
 - **Address 1-** Street address
 - **Address 2-** Continuation of street address or apartment number
 - **Address 2-** Continuation of street address or apartment number
 - **City-** City
 - **Postal-** ZIP code
 - **State-** State
 - **Telephone-** Telephone number for Emergency Contact
3. To add more contact telephone numbers for your emergency contact, click **Add a Phone Number**.
4. When you are finished entering contact information, click **Save**.
5. If you made a change, you will see the panel shown in Figure 11. Click **OK**.



Figure 11: Confirmation of a successful save

Change existing information for an emergency contact person

Click on **Edit** to the right of an emergency contact name in order to change the name, telephone number or address information for that emergency contact person.

Delete emergency contact information

Click on **Delete** to delete an emergency contact from your list.

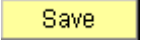
Add more emergency contacts

Click on **Add an Emergency Contact** to add another emergency contact. Complete steps 2 through 5 on page 11.

Change the primary contact

Click [Change the primary contact](#) if you wish to assign another one of your emergency contacts as the primary person to be contacted.

NOTE: If you receive an error message from the system stating “One emergency contact must be indicated as the primary contact (1000,112). Please turn on the primary checkbox for the emergency contact which is the primary contact,” do the following:

- a. On the Emergency Contacts page click the [Change the Primary Contact](#) button.
- b. Select the name of your primary emergency contact from the list.
- c. Click .

Click [Return to Emergency Contacts](#).

Training Enrollment

Navigation: MB Employee Self Service > Training > Training Enrollment

Training Enrollment
Marvin Mollusk
Please choose one of the search methods below to find a course session.

[Search by Course Name](#)

[Search by Course Number](#)

[Search by Category](#)

[Search by Date](#)

Go To: [Self Service](#)
[Learning and Development](#)
[Training Summary](#)

Figure 12: Click one of the Search options to find a course session

1. By default, the system will search for all course sessions today and in the future. Click one of the **Search** options to list future course sessions, as shown in Figure 13.

Training Enrollment
Course Search

Enter a date range and click the Search button to get a list of courses offered within that range. Leave the date fields blank to get a list of all available courses.

From: Through:

(example: 12/31/2000) (example: 12/31/2000)

Start Date	Course Description	Category	Subcategory	Course Number	
04/26/2007	MPP Orientation ProSeminar	PROFDEV	MPP	000245	View Sessions Available
04/27/2007	Purchase Requisitions	CMS	FIN	000157	View Sessions Available
05/08/2007	Teambuilding Coaching Mentor	PROFDEV	MPP	00254	View Sessions Available
05/23/2007	Succeeding in Times of Change	PROFDEV	ADMINPROF	000250	View Sessions Available
06/05/2007	Performance Management	PROFDEV	MPP	000255	View Sessions Available

Figure 13: Click the Search button to see future course sessions

2. Use From and Through to set a date range for courses you wish to see (optional). Click the Search button to see future course sessions.
3. To enroll in a session, click View Sessions Available on the line listing the course in which you wish to enroll. Alternatively, click on the Course Description to see the content and intended audience for the course.

Training Enrollment
View Available Sessions

000157 Purchase Requisitions

Click on a session number in the list below to view course session details or to enroll in the course.

04/27/2007

Session	Location	Start Time	Duration (Hours)	Open Seats	Waitlisted
0050	Information Technology	11:00AM	1.5	9	0

[Return to Course Search](#)

Figure 14: Click on Session number to enroll

Training Enrollment
Session Detail

Marvin Mollusk

Click Continue to enroll in the course.

Course: 000157 Purchase Requisitions
Session: 0050
Location: Information Technology
Start Date: 04/27/2007
Duration (Hours): 1.5
Language:
Prerequisites: None

Session Schedule

Date	Start Time	End Time
Friday 04/27/2007	11:00AM	12:30PM

If this session is full, place me on the waiting list.

[Continue](#)

[Return to Course Search](#)

Figure 15: Click Continue to enroll

- Click **Continue** to enroll in the session.

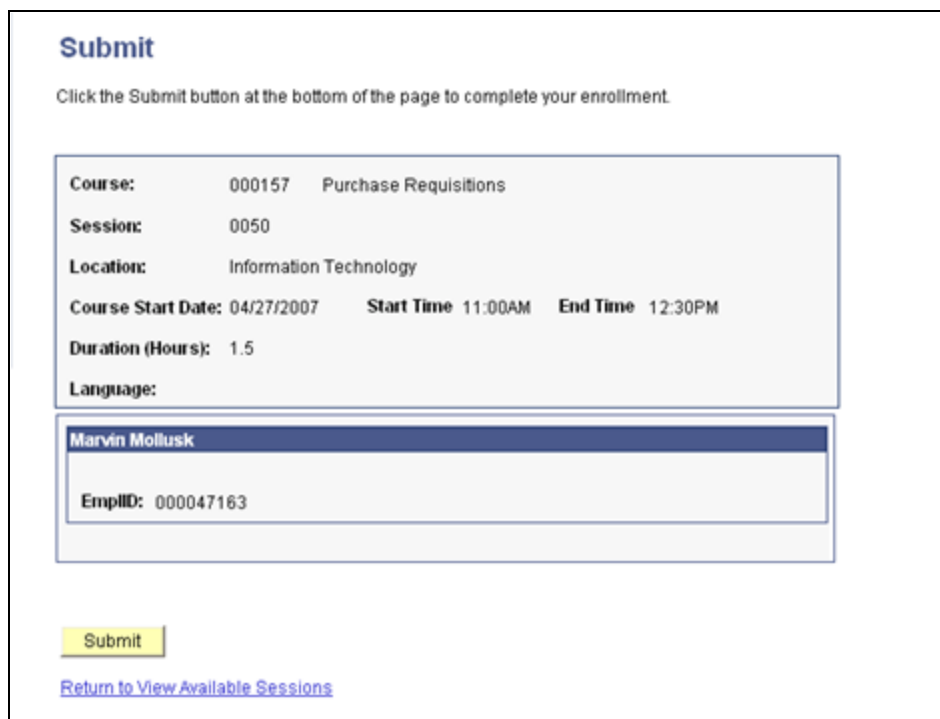


Figure 16: Click Submit

5. Click **Submit**. You will see the screen shown in Figure 17.
6. Click **OK**.



Figure 17: Click OK

7. Click **Sign out** (in the top right corner) or a menu option.

Training Summary

Navigation: MB Employee Self Service > Training > Training Summary

Internal Training				
Course Name	Course Start Date	Course End Date	Status	Drop
Purchase Requisitions	04/27/2007	04/27/2007	Enrolled	Drop
Intro to Finance 84	04/25/2007	04/25/2007	Enrolled	Drop

Other Professional Training		
Course Name	Course End Date	Facility/School

Figure 18: Summary of training completed and course sessions in which you are enrolled

1. Click on a Course Name to read its description, or click Drop to drop a course session in which you are enrolled.
2. Click **Sign out** (in the top right corner) or a menu option.

Health Care Summary

Navigation: MB Employee Self Service > Benefits > Health Care Summary

Health Care Summary

Marvin Mollusk

To view your benefits as of another date, enter the date and click Go:

You have no benefit enrollments as of the date entered.

Go to:

[Health Care Dependent Summary](#)

Figure 19: Health Care Summary

Health Care Dependent Summary

Navigation: MB Employee Self Service > Benefits > Health Care Dependent Summary

Health Care Dependent Summary

Marvin Mollusk

Click the link to view your dependents by their name or type of benefit.

To view your benefits as of another date, enter the date and click Go:

[Dependent's Summary by Name](#)

You have no benefit enrollments as of the date entered.

[Return to Health Care Summary](#)

Figure 20: Health Care Dependent Summary

Dependent Coverage

Dependent Coverage Summary shows all your dependents and what health care coverage each has.

Navigation: MB Employee Self Service > Benefits > Dependent Coverage Summary



Dependent Coverage Summary
Marvin Mollusk
To view your benefits as of another date, enter the date and click Go:

You have no benefit enrollments as of the date entered.
Go to: [Dependents Summary](#)

Figure 21: Dependent Coverage Summary

Dependent Info

Dependent Info lists your dependents.

Navigation: MB Employee Self Service > Benefits > Dependent Info

Dependent Personal Information

Marvin Mollusk

Click the Dependent's name if you would like to review. Contact the Benefits Department to make changes to your dependent's personal information.

Summary
You have no dependent/beneficiary personal information on record.

Go to: [Dependent Coverage Summary](#)

Figure 22: Dependent Coverage Summary