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

All functions of CMS Student/HR for Self Service.

### Review/Approval History

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<thead>
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<th>Date</th>
<th>By</th>
<th>Action</th>
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<td>7 June 2005</td>
<td>M Galligan</td>
<td>Original</td>
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<td>23 January 2006</td>
<td>M Galligan</td>
<td>Update to reflect software changes</td>
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<td>30 January 2006</td>
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<td>17 May 2007</td>
<td>C Frakes</td>
<td>Added introductory table from another job aid. Added note about primary emergency contact error message for another job aid.</td>
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<td>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 Removed out-of-date note about Student Assistant Home Address on page 10.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.</td>
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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.

**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](image)
Home Address

**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.

**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 3**: 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 **Save**.

4. If you made a change, you will see the panel shown in Figure 7. Click **OK**. If you did not make a change, click **Return to MB Employee Self Service**.

![Figure 7: Change confirmed](image)

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

![Image of Emergency Contacts screen]

**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.

![Image of Emergency Contact form]

**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](image)

**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 **Save**.

Click **Return to Emergency Contacts**.
Training Enrollment

Navigation: MB Employee Self Service > Training > Training Enrollment

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.

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.
Figure 14: Click on Session number to enroll

4. 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

![Training Summary](image)

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:

04/25/2007 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

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**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:

04/25/2007  

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**Dependent's Summary by Name**

You have no benefit enrollments as of the date entered.

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**Return to Health Care Summary**

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*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](image)

You have no benefit enrollments as of the date entered.

Go to: Dependent Summary

*Figure 21: Dependent Coverage Summary*
**Dependent Info**

Dependent Info lists your dependents.

**Navigation:** MB Employee Self Service > Benefits > Dependent Info

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**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

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**Figure 22: Dependent Coverage Summary**