

Name Change – Personal Data (0002)

PA30

**Purpose** Use this procedure to change an employee’s name in the *Personal Data* (0002) infotype.

**Trigger** • Employee’s name has changed due to the following: married, divorced, etc.

**Prerequisites** • Follow your agency’s business policy on employee name changes.  
• Gather any required documents.

**End User Roles** In order to perform this transaction you must be assigned the following role:  
Personnel Administration Processor

| Change History |   |
|----------------|---|
| Date           | Change Description  |
| 11/18/2010     | New procedure created.  |
| 02/21/2013     | Updated screen first screen shot of Personal Data. Start date now hire date, not the employees date of birth. |

**Menu Path** Human Resources → Personnel Management → Administration → HR Master Data → Maintain

**Transaction Code** PA30

|                             |   |
|-----------------------------|---|
| <p><b>Helpful Hints</b></p> | <ul style="list-style-type: none"> <li>• An employee’s name is initially created when employee is hired; see OLQR User Procedure, <a href="#">New Hire Action</a> (PA40).</li> <li>• The Agency needs to determine if the employee’s name change needs to be tracked or not.             <ul style="list-style-type: none"> <li>○ If name change isn’t tracked, the current name can be CHANGED  (for example, a capitalization, misspelling, spacing or punctuation correction). The employee name is changed in the current <i>Personal Data</i> (0002) infotype record. Changing the current record, will not cause a payroll retro calculation.</li> <li>○ If a name change needs to be tracked, it’s suggested the agency COPY  the current <i>Personal Data</i> (0002) infotype record and enter the updated name with the date it was changed. Doing this will automatically end date the prior <i>Personal Data</i> (0002) infotype record. Using the COPY function is typically used when a name is changed, for example, when an employee is married or divorced. You also have the option to add a ‘note’ to the infotype record. See OLQR User Procedure, <a href="#">Infotype Messages</a>.</li> </ul> </li> </ul> |
| <p><b>Related OLQR</b></p>  | <p>When making changes with an effective date prior to current payroll period, see</p>  |

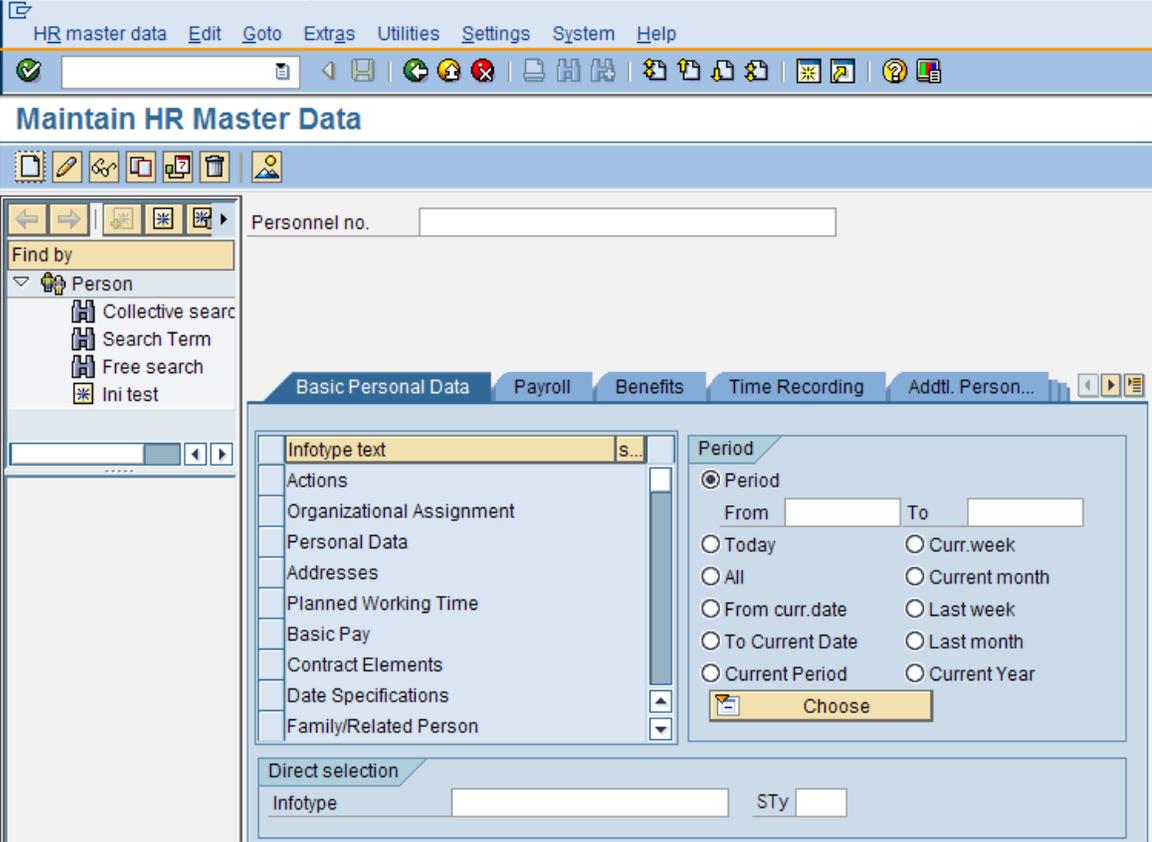
|                   |   |
|-------------------|---|
| <b>Procedures</b> | OLQR Procedure, <a href="#">Payroll Status Updating</a> . |
|-------------------|---|

The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

| Message Type  | Description  |
|---|--|
| <b>Error</b><br>   | <b>Example:</b>  Make an entry in all required fields.<br><b>Action:</b> Fix the problem(s) and then click  (Enter) to validate and proceed.   |
| <b>Warning</b><br>   | <b>Example:</b>  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end.<br><b>Action:</b> If an action is required, perform the action. Otherwise, click  (Enter) to validate and proceed. |
| <b>Confirmation</b><br> or  | <b>Example:</b>  Save your entries.<br><b>Action:</b> Perform the required action to proceed.   |

**Procedure**

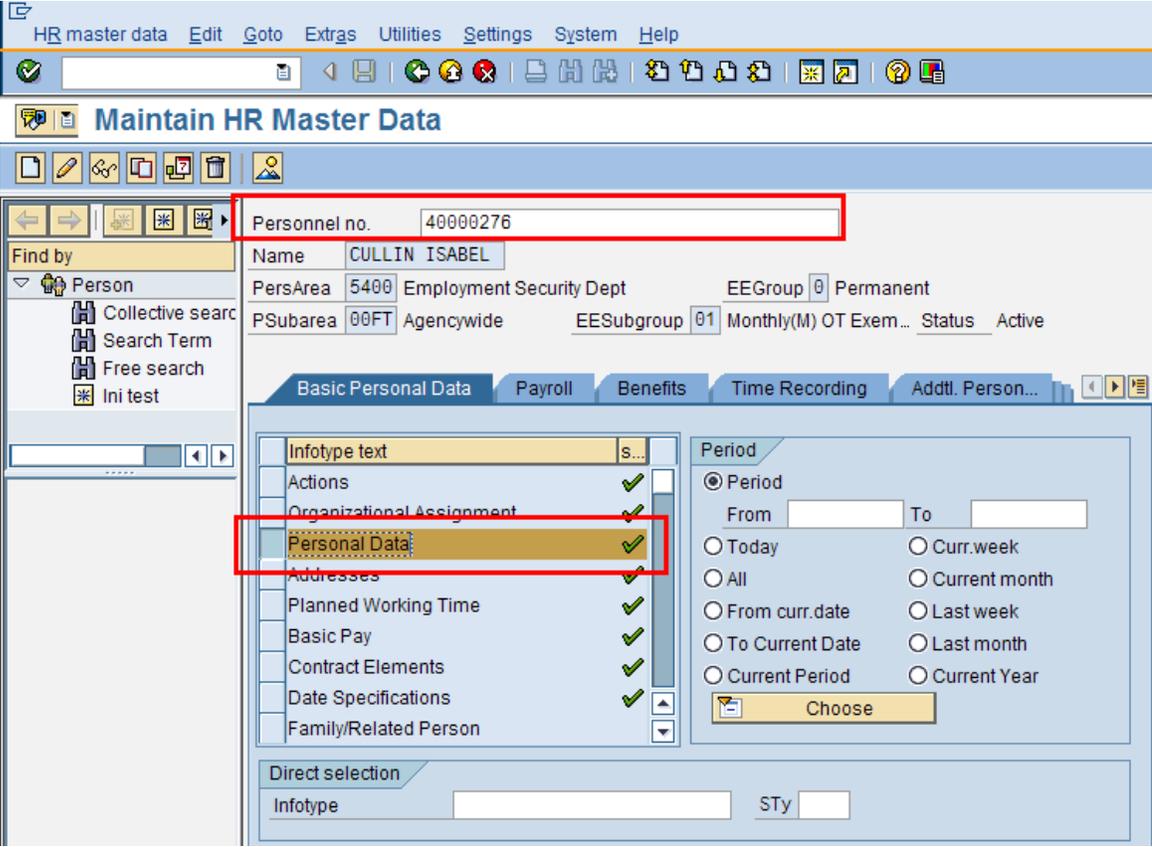
1. Start the transaction using the above menu path or transaction code **PA30**.



2. Complete the following fields:

| R=Required Entry O=Optional Entry C=Conditional Entry |       |   |
|---|-------|---|
| Field Name  | R/O/C | Description   |
| Personnel no.   | R     | The employee’s unique identifying number.<br><b>Example:</b> 40000276 |

3. Click (Enter) to validate the information.
4. Click the box to the left of **Personal Data** to select.



- 5. Click  (Copy) to copy and continue.

6. Complete the following fields:

| R=Required Entry O=Optional Entry C=Conditional Entry |       |  |
|---|-------|--|
| Field Name  | R/O/C | Description  |
| Start   | R     | This is the date on which a record begins.<br><b>Example:</b> 11/16/2010   |
| Last Name   | C     | This is the legal last name of an employee as indicated on the social security card.<br><b>Example:</b> Swan   |
| First Name  | C     | This is the legal first name of an employee as indicated on the social security card.<br><b>Example:</b> Isabel  |
| Marital Status  | O     | This is the marital status of the employee, i.e. single, married, divorced, etc.<br> Click the drop-down menu to open the selection list. |

|       |   |  |
|-------|---|--|
|       |   | <b>Example:</b> Married  |
| Since | 0 | This is the date on which something started, such as the employee’s date of new ID issued or marriage. |

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- 7. Click  (Enter) to validate the information.
- 8. Click  (Save) to save.
- 9. You have completed this transaction.

|  |
|--|
| <b>Results</b>                                     |
| You have successfully updated the employee’s name. |
| <b>Comments</b>                                    |
| None.  |