How to…
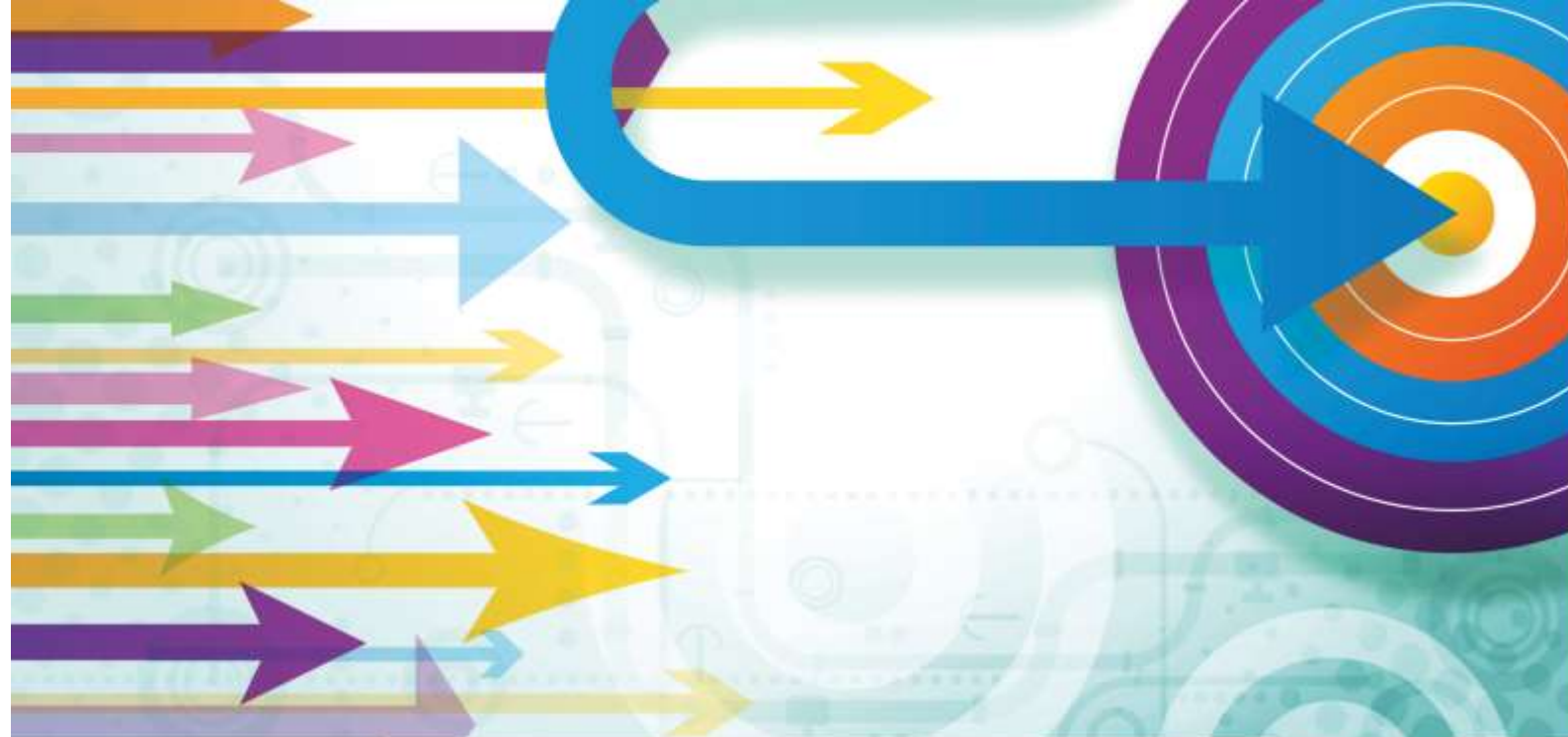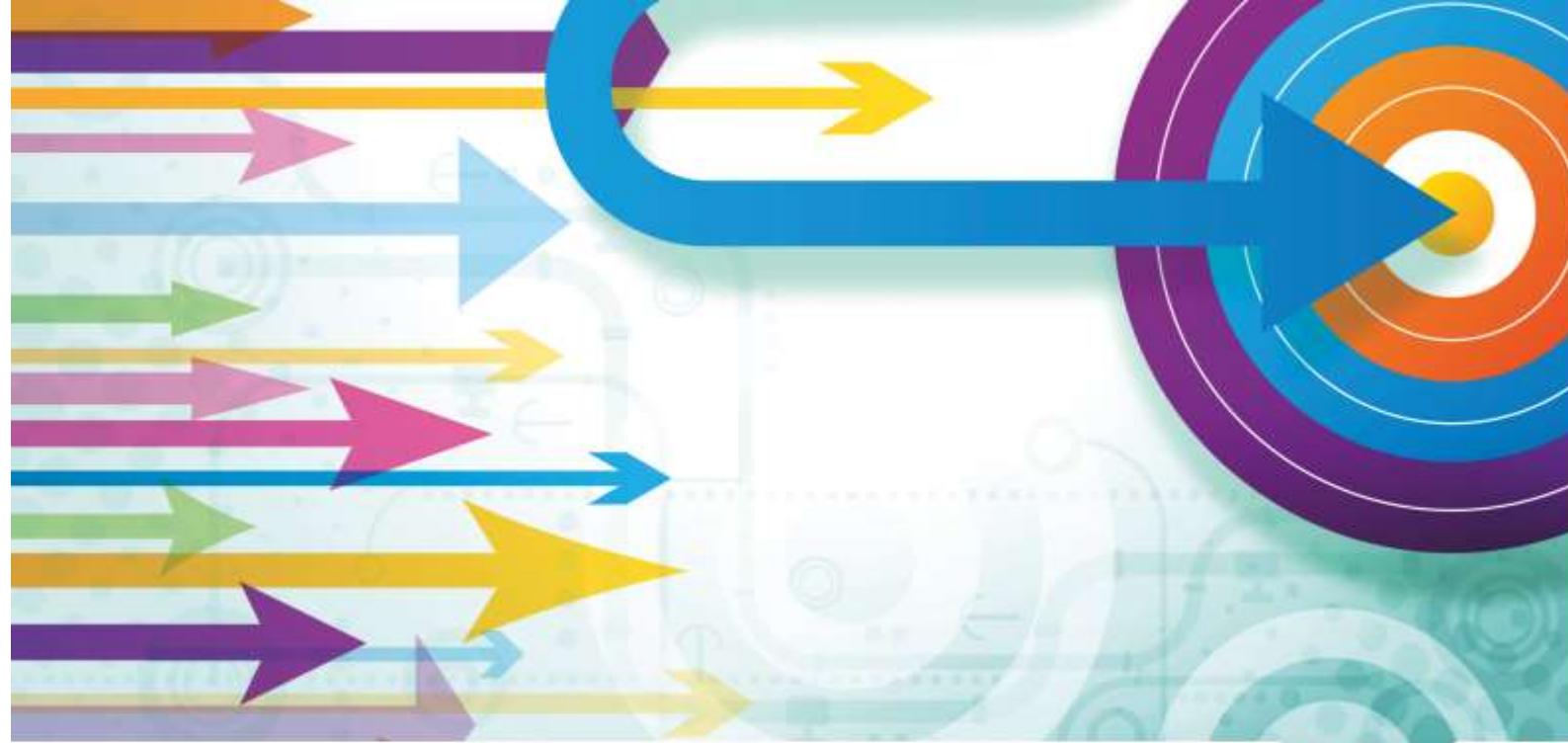
Update personal details in SuccessFactors

This guide applies to all individuals with a record (profile) in SuccessFactors.

This guide details how individuals (University employees, temporary/variable workers, sessional teachers and honorary/visiting associates) can update their personal details (including bank details) in SuccessFactors. It also sets out the actions that line manager/STP teams and central HR administrators need to take in relation to certain changes.
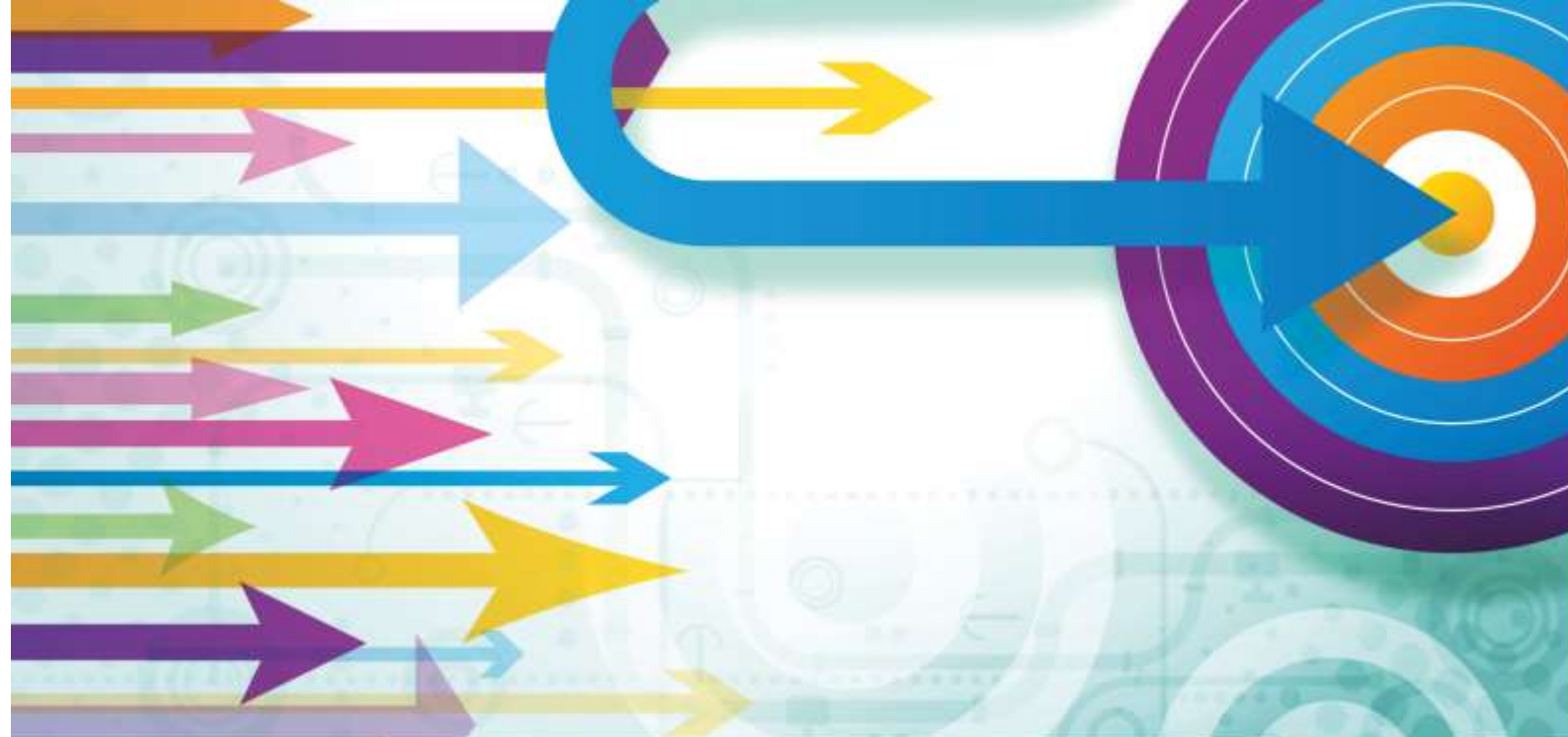
Please note that changes to legal name(s) will generate a workflow (an in-system approval), which goes to the individual's line manager/STP team or, in the case of a sessional teacher, to the STP team. This is because certain changes to these fields require supporting documentation to be provided to and reviewed by the person's line manager/STP team/STP team before the requested change can take effect. Further details are provided within the relevant sections.

This guide should be used in conjunction with the process map for a change of personal details (where documentary evidence is required) and/or the process map for a change of bank details, which can be found on the HR web pages.

Contents

Version History

Version	Date Published	Authored By	Summary of Key Changes
1.0	17/09/19	Emma Shield, Brigitte Hatfield and Liz Timperley-Preece	N/A – first publication
1.1.	01/10/19	Brigitte Hatfield	Addition of Payroll as second approver to name changes
1.2	15/11/19	Brigitte Hatfield	Change in advice within bank details section
2.1	28/02/20	Brigitte Hatfield	Inclusion of Sessional Teachers
2.2	29/04/20	Brigitte Hatfield	Removal of workflow for salutation

Section A – Individual Guidance
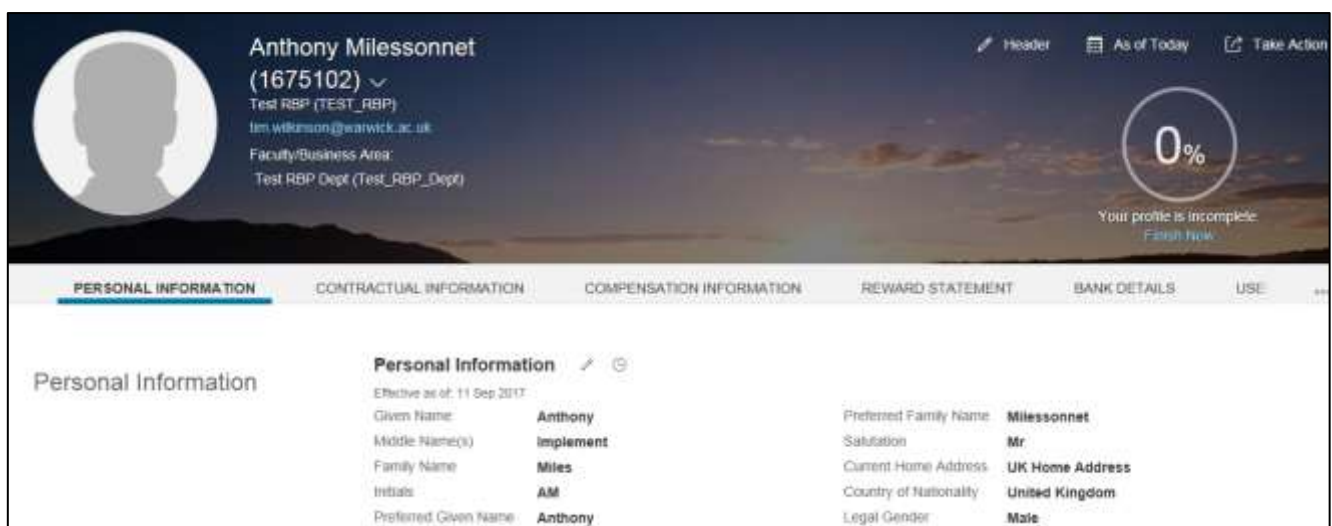
Introduction

Individuals working for or associated with the University who have a person profile in SuccessFactors are responsible for keeping certain information about themselves up-to-date within the system.

This section explains how individuals are able to update the following areas of their person profile:

- Personal Information (including salutation, name(s), gender and equal opportunities information)
- Address Information
- Contact Information (telephone numbers)
- Emergency Contact
- Bank Details
- Profile information

Reviewing your details – an overview

1. Log in to SuccessFactors.

2. On your home screen, click on the **'My Profile'** tile (found in the **'My Info'** section). You will be taken to the following screen:

3. Go to the section that you wish to review by using the up/down scroll bar on the right hand side of the screen, or by clicking on the relevant tab (heading) at the top of your profile.

    - **Editing details –** in the sections that you are permitted to edit yourself, you will see a pencil icon (circled in red within the screenshot below). Click on the pencil icon to begin making a required change; you will be taken to a pop up screen where you will be able to amend your data.

Personal Information ✎ 🕐

Effective as of: 11 Sep 2017

Given Name	Anthony
Middle Name(s)	Implement
Family Name	Miles
Initials	AM
Preferred Given Name	Anthony
Formal Name	Anthony Milessonnet

For certain changes, you will need to enter the date that the changes are to take effect from. The date will default to today's date. When selecting a date, you should be aware of the cut-off dates for updating information that impacts on payroll processing. If you miss the cut-off date for a particular month, your existing details will be used for that month and your new details will be used the following month.

Tip: If you click on the calendar in any field requiring a date, a pop-up calendar will appear on screen for you to find the appropriate date. When you click on the appropriate date, the field will be populated for you. Alternatively, you can enter the date manually in the format shown within the field (DD/MM/YYYY).

• **Viewing history –** where the history of changes (including future-dated changes) made in a particular section is available for you to view, you will see a clock icon (circled in red within the screenshot below).

Personal Information ✎ 🕐

Effective as of: 11 Sep 2017

Given Name	Anthony
Middle Name(s)	Implement
Family Name	Miles
Initials	AM
Preferred Given Name	Anthony
Formal Name	Anthony Milessonnet

Click on the clock icon and a pop-up window will appear on screen. On the left hand side of the window, click on the summary details of the change that you wish to review (underneath 'Change History') and the full details will be shown on the right-hand side.

Updating your Personal Information section

Background

The Personal Information section of your person profile includes a number of different data fields, including salutation, name(s), gender and equal opportunities information. Many of the fields are editable by you and, where they are, you are responsible for updating them as and when required.

Certain changes that you make in this section will:

- Require you to show your line manager/STP team original evidence that a change has taken place (e.g. a copy of a marriage or deed poll certificate would be appropriate evidence of a change in 'Family Name').
- Require you to upload a copy of the evidence into the Personal Information attachment field.
- Generate a workflow (in-system approval) for your line manager/STP team and the payroll department to review and confirm before the changes you have made are live in the system.
- Send an email notification to your department administrator, local HR administrator and central HR to highlight that you have made a change in your personal details and that this should be reflected in their records (e.g. your central HR personal file).

Please see Appendix 1 for full details of the fields found in the Personal Information section of your person profile, what they mean and if you can edit them. It also sets out which changes require supporting evidence and generate a workflow - and why this is this case.
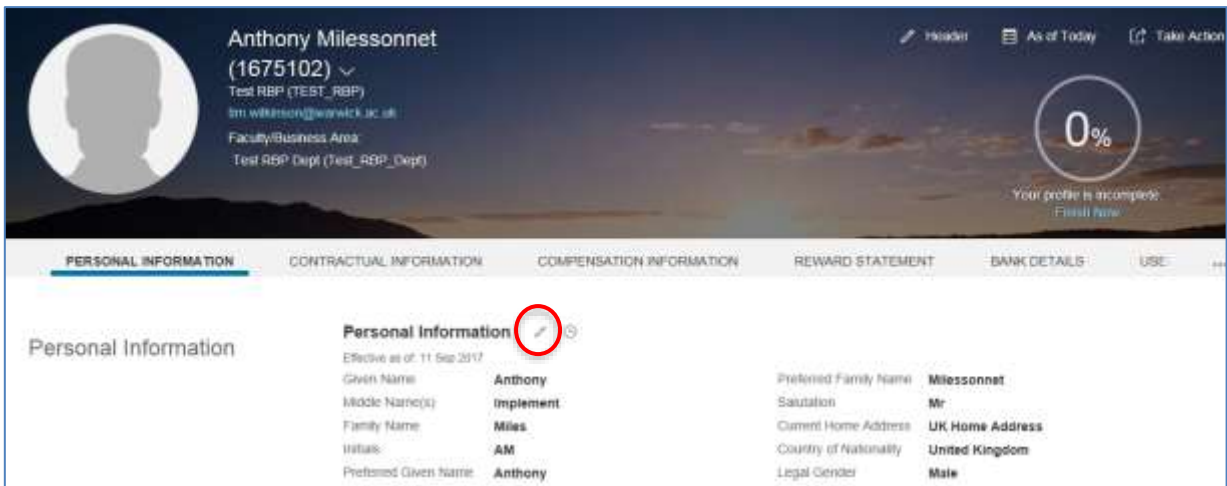
Note: If you are in receipt of a gender recognition certificate or other proof of a legal change of gender (passport, birth certificate), arrangements can be made with central HR via the Equality, Diversity & Inclusion team to have your record amended in such a way that any historical records showing your gender assigned at birth are removed. Please see Appendix 1 for further details.

Please note that certain fields will not exist in some person profiles (e.g. if you are an honorary or visiting associate, we do not need to gather certain details from you that we need for employees and those who conduct paid work with us).

Appendix 2 provides further details about how some of the more sensitive details in your Personal Information section are used and who can see them.

How to edit
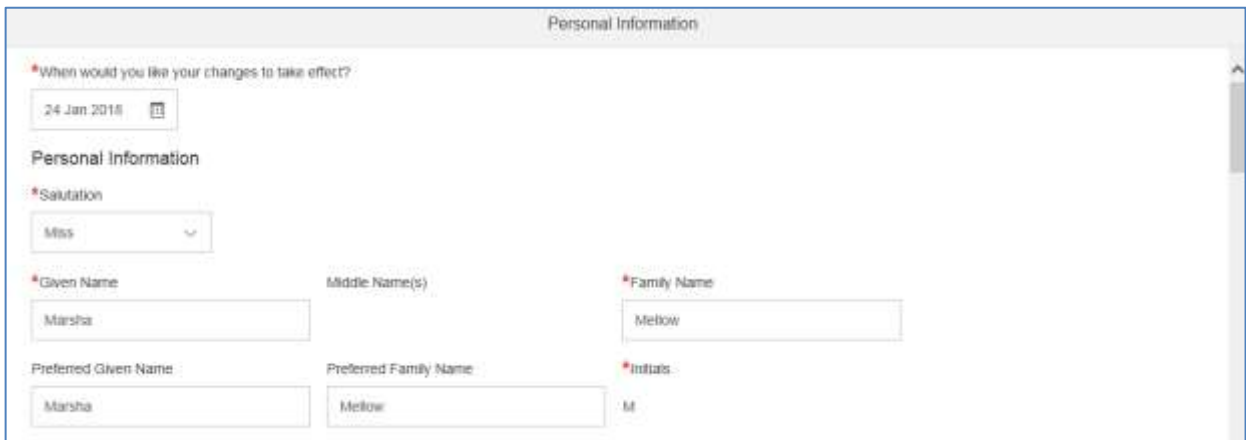
1. Before making any changes to your Personal Information, please review Appendix 1 and check whether the details you wish to edit:
   - Require you to show any original supporting evidence of the change to your line manager/STP team (it is recommended that you do this before initiating the change in the system);
   - Upload a copy of supporting evidence of the change into the system (you will need to have scanned this and saved an electronic copy before making the relevant change within the system); and
   - Require your line manager/STP team and payroll to confirm a workflow (in-system approval) before the change is live in the system.

2. Log in to SuccessFactors.

3. On your home screen, click on the **'My Profile'** tile (found in the **'My Info'** section). You will find the **'Personal Information'** section at the top of your SuccessFactors profile page.

4. Click on the pencil icon:

5. The following pop up window will appear:

Enter the date that the changes are to take effect from at the top of the pop-up window. The date will default to today's date (see step 3 in the **'Reviewing your details – an overview'** section of this guide for further details on selecting/entering dates in SuccessFactors.) When entering/selecting a date, you should be aware of the cut-off dates for updating information that impacts on payroll processing. If you miss the cut-off date for a particular month, your existing details will be used for that month and your new details will be used the following month.

> Note: Not all fields show on screen automatically. Click on the **'Show 9 more fields'** link to see them all.

6. Update the information you wish to change by clicking in the relevant field, deleting the value that is there and entering the new details.

> Note: If you are a Research Assistant and you have been awarded your PhD, changing your salutation to 'Dr' in the system will not automatically trigger a request to appoint you as a Research Fellow. Your department will need to submit a separate change request for this. Please see the 'How to… amend positions and appointments in SuccessFactors' guide for further details.

7. If you are updating details in the system yourself where evidence of the change is required (i.e. given name, family name), you must scan the supporting documentation concerned (e.g. marriage certificate, deed poll certificate for a family name change) and upload it into the system.

a) Scroll down within the pop-up window, until you see the **'Documentation'** sub-section shown below.

b) Click on the plus icon ('+') to the top right-hand side of the **'Documentation'** sub-section. This will open a pop-up window of your device's drives:
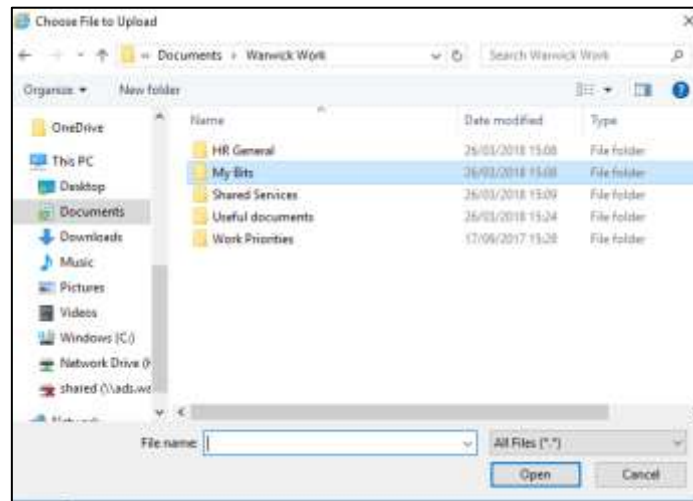
c) Navigate to where you have saved the copy of your supporting evidence. Double-click on the relevant file, which will upload it into the system.

 Note: Please ensure that you show your line manager/STP team the original copy of the supporting documentation that you upload into the system, if you have not done so already. They will need to see this before they confirm the workflow (in-system approval) that they receive and the payroll department will decline any requests that do not contain this documentary evidence as an attachment.

8. Once you have finished updating your information, click on **'Save'** in the bottom right hand corner.

9. If the information you have changed doesn't need confirmation by your line manager/STP team and payroll (see Appendix 1 for details), the new values you have entered will be live in the system from the date you have specified. If the effective date of the change is today or before today, you will be able to see the changes on screen immediately. If the changes are in the future, you will be able to check them by clicking on the clock icon (see step 3 in the 'Reviewing your details – an overview' section for further information on the clock icon).

If the data you have changed requires review and confirmation by your line manager/STP team and payroll via a workflow (in-system approval), there will be further steps in the process, as described below.

10. The following pop up message will appear:

If you want to add any message to your line manager/STP team/payroll who will be approving the change, you can use the free text box to type in a message. Otherwise, leave the text box blank.

11. Click on **'Confirm'** in the bottom right hand corner. A notification email will then be sent automatically to your line manager/STP team, instructing them to review and confirm the change within the system (once they have seen your original documentary evidence).

12. Your line manager/STP team will then review the information submitted and either approve or send the request back to you if further information or amendments are required.

   a) If your line manager/STP team **'Sends back'** your change request, you will receive a notification email to inform you of this. You will also see an item in your **'Approve Requests'** tile in SuccessFactors (which appears in the **'To Do'** section of your home page when you have in-system actions known as workflows to review).
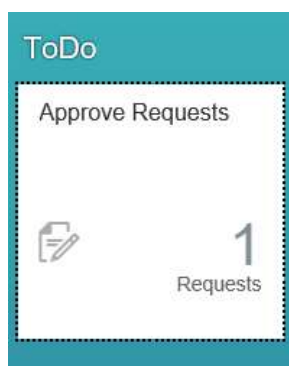
   Click on the **'Approve Requests'** tile and you will be taken to the workflow relating to the change you made in your personal information. You can either **'Update'**, **'Withdraw'** or **'Re-submit'** the request by clicking on the relevant button at the bottom of the screen. Clicking on **'Update'** will take you back to step 1 in this section, where you can make further changes as appropriate (e.g. in the event of a spelling mistake).
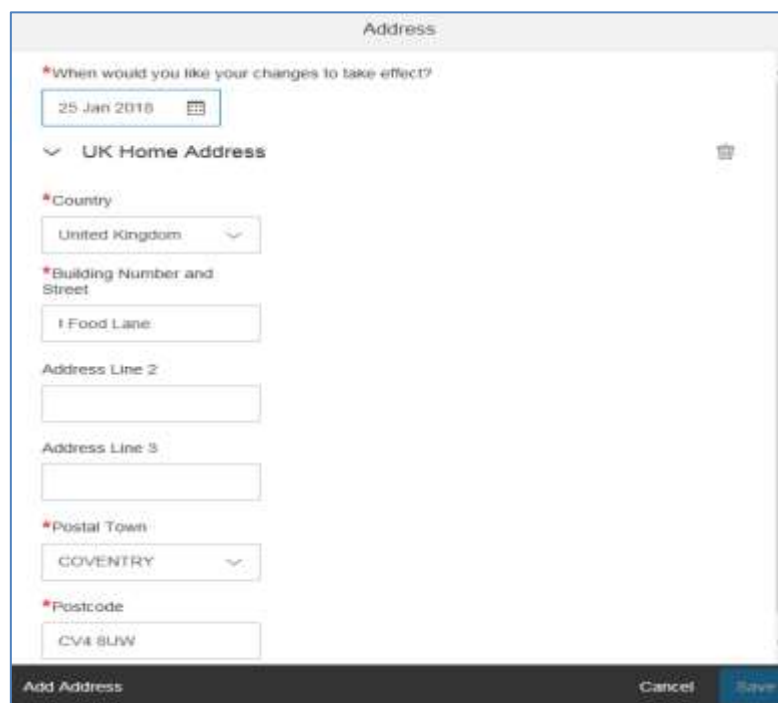
   b) Once your line manager/STP team has reviewed and confirmed the change you have made by approving the workflow that they have received, a further workflow will trigger to the Payroll department and you will receive a notification email to inform you of this. Your updated details will be live in SuccessFactors from the effective date that you specified only when a member of the Payroll department has verified the supporting documentation.

   Note: Your department administrator and local HR administrator will receive an email notification to highlight to them when a change in personal information that required your line manager/STP team and payroll's approval has taken place. This will enable them to update your department's records.

Updating your Address Information section

1. Log in to SuccessFactors.

2. On your home screen, click on the **'My Profile'** tile (found in the **'My Info'** section). Scroll down to the **'Address Information'** section'.

3. Click on the pencil icon. The following pop up screen will appear:

Note: You will see an option of **'Add Address'** at the bottom left-hand side of the pop-up window, which allows you to enter another address whilst retaining the one already saved in the system. In most circumstances, you should not use this as you will be replacing old address details. In addition, the University only needs to hold one address for you (your primary UK residence), unless your main residence is overseas (in which case, we will need to hold the details of where you reside when you are in the UK as well as your overseas address, if applicable).

4. Enter the date that the changes are to take effect from. The date will default to today's date (see step 3 in the **'Reviewing your details – an overview'** section of this guide for further details on entering the date). When entering/selecting a date, you should be aware of the cut-off dates for updating information that impacts on payroll processing. If you miss the cut-off date for a particular month, your existing details will be used for that month and your new details will be used the following month.

5. Update your address information as required, either by clicking on the rubbish bin icon and entering your new details into blank fields from scratch or by clicking in the relevant fields that need updating, deleting the elements of your address that need updating and adding in new information. You may wish to use the latter option if some of your address details are remaining the same (e.g. postal town).

> **Note:** Do not use any special characters in the address fields (including commas and apostrophes) and ensure there is a space in the postcode to separate the two parts of the postcode.

6. Click on **'Save'** in the bottom right hand corner. A message will appear briefly on screen confirming that the changes have been made successfully.

7. Your updated details will be live in SuccessFactors from the effective date that you specified. The updated details will also be transferred automatically to the University's payroll system (where required), although there may be a short delay in this happening if the payroll system is locked for editing during the monthly payrun process.
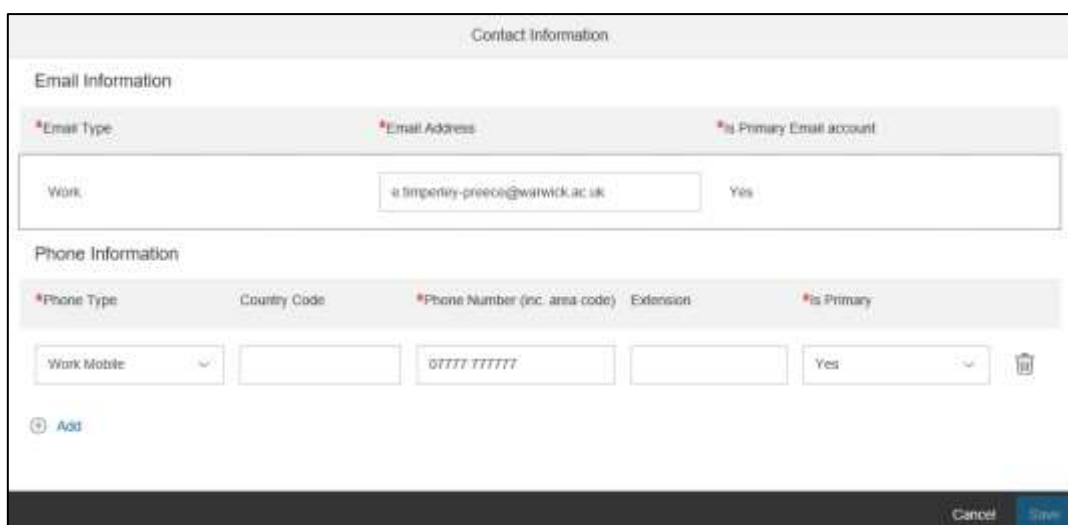
Updating details in the Contact Information section

Background
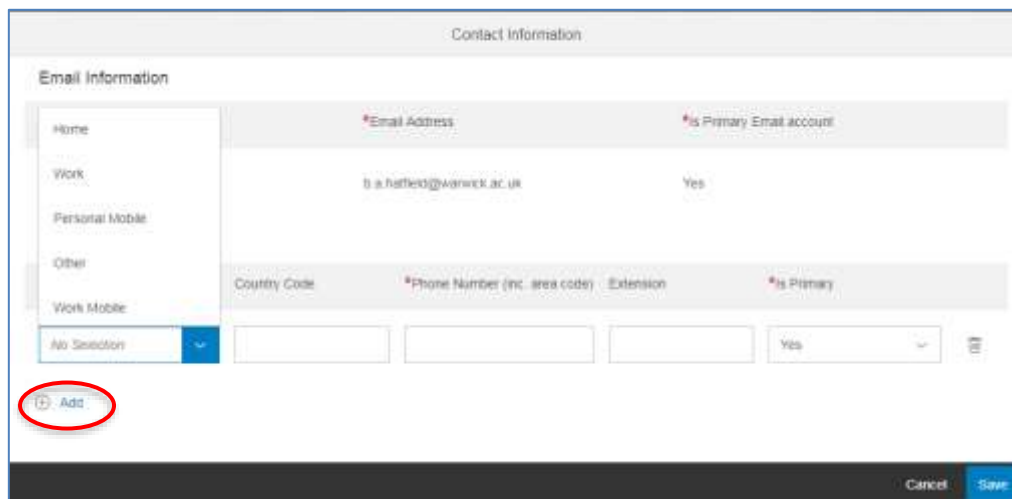
You are only able to edit or add telephone numbers in the Contact Information section. You cannot change your email address details because the system will already hold your Warwick email address and we do not typically require your personal email address details to be held in SuccessFactors (unless you are a Tier 2 visa holder, in which case personal email addresses will be held). Once you have started work the University, will only communicate with you via email using your Warwick email address. This is vital for enabling compliance with data protection legislation and the University's data protection policy.

How to edit your telephone numbers

1. Log in to SuccessFactors.

2. On your home screen, click on the **'My Profile'** tile (found in the **'My Info'** section). Scroll down to the **'Contact Information'** section'.

3. Click on the pencil icon. The following pop up screen will appear:

4. If you wish to add a telephone number click on the **'+ Add'** icon and complete the information accordingly. Please ensure that you enter a **'Country Code'** if you are recording a non-UK number. Mandatory fields are indicated with a red asterisk.

📋 Note: If you add a 'Work' telephone number to SuccessFactors, this will display in the banner of your person profile and will be visible by colleagues across the University.

5. If you wish to edit any existing telephone numbers held in the system, click in the field(s) requiring an update. Select the value needed from the dropdown menu or delete the current values using the rubbish bin icon and type in the new ones, as applicable. Please ensure that you enter the **'Country Code'** if you are recording a non-UK number and update which number is the primary entry, if required.

6. Once you have finished adding or updating your phone information, click on **'Save'** in the bottom right hand corner. A message will appear briefly on screen confirming that the changes have been successfully made.

7. Your updated telephone details will be live in SuccessFactors.

Updating your Emergency Contact information

1. Log in to SuccessFactors.

2. On your home screen, click on the **'My Profile'** tile (found in the **'My Info'** section). Scroll down to the **'Emergency Contact'** section'.

3. Click on the pencil icon. The following pop up screen will appear:

4. If you wish to change any details already held, click in the field(s) requiring an update. Select the value needed from the dropdown menu or delete the current values and type in the new ones, as applicable. You do not need to click on **'Edit details'**. If you wish to delete an emergency contact completely, click on the rubbish bin icon.

5. If you wish to add an additional emergency contact, click on **'Add Emergency Contact'** at the bottom left-hand side of the pop-up window and complete the information accordingly.

6. Once you have finished updating your information, click on **'Save'** in the bottom right hand corner. A message will appear briefly on screen confirming that the changes have been successfully made.

7. Your updated emergency contact details will be live in SuccessFactors.

Updating your Bank Details section

1. Log in to SuccessFactors.

2. On your home screen, click on the **'My Profile'** tile (found in the **'My Info'** section).

3. Click on the **'Bank Details'** tab within your profile, or scroll down to this section.

4. Click on the pencil icon. The following pop up screen will appear:

You will be asked to select/enter the date you would like your changes to take effect from and the date will be defaulted to today's date.

Note: You **must** change this date to the date you started working at the University if you did not provide bank details when accepting your offer of work and this is the first set of bank details being added to your record. Do not be concerned if you didn't open your bank account until after your start date with the University – this won't cause any issues with your bank – it will just ensure that our payroll system has bank details for the whole time you have worked with us and can make payments to you effectively.

If you are changing your existing bank details, please select the date from which you would like your amendment to take effect. However, you should be aware of the cut-off dates for updating information that impacts on payroll processing. If you miss the cut-off date for a particular month, your existing bank details will be used for that month and your new bank details will be used the following month. Please also note that your salary can only be paid into one bank account in any given month so if you change your details part way through a month but before the cut-off date, your whole salary for that month will be paid into your new account. **You should not close down your old bank account until you have received payment into your new account.**

Please see step 3 in the **'Reviewing your details – an overview'** section of this guide for further details on how to select or enter a date in SuccessFactors.
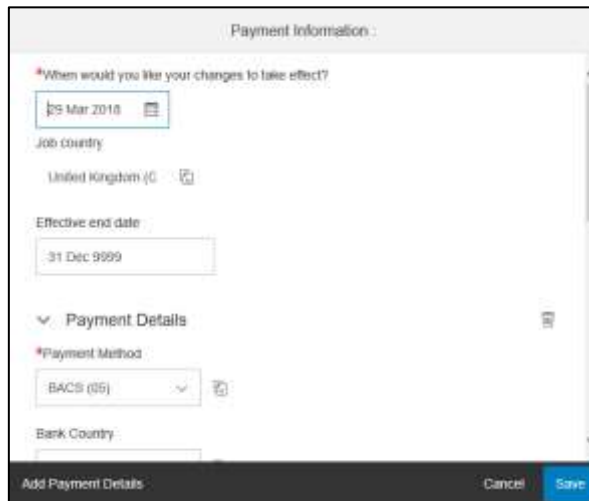
5. If you wish to amend a typographical error only, click in the field(s) requiring an update. Select the value needed from the dropdown menu or delete the current values and type in the new ones, as applicable. Skip to step 11 below.

If you are completely changing your bank details, click on the rubbish bin icon to and follow the steps below. You will also need to click on this icon if you are adding your bank details for the first time and need to delete the placeholder information in your record (i.e. your profile will show a payment method of 'No automatic payments' to indicate that we don't yet have UK bank details that we can use for payments to you; this will need to be deleted before you can add your UK bank details).

6. If you have used the rubbish bin icon, click on **'Add Payment Details'** in the bottom left hand corner of the pop-up window.

7. For **'Payment method'**, select **'BACS'**. BACS is a widely-used service which enables the University and other organisations to make electronic payments directly into a bank or building society account.

   Note: The option of **'No Automatic Payments'** must only be used if your salary is to be paid into a foreign bank account and only when you have submitted a foreign bank account details form to the HR Expenses team. The Bank Country field will auto-populate to 'United Kingdom' and must not be changed. If you have an account from another country, you must fill in the foreign bank account details form instead of entering your details into SuccessFactors.

8. Do not complete any other fields yet. Scroll down to the **'Bank'** field and enter your sort code. This will filter the results to the correct bank branch; click on the correct entry when it appears. This will result in the **'Sort Code'** field being prefilled for you.

9. Scroll back up in the pop-up window to complete the **'Account Owner'** name and the **'Account Number'** fields. You only need to complete the **'Building Society Roll Number'** field if you have a building society account. You do not need to complete the **'Business Identifier Code'** field.

10. Click on **'Save'** in the bottom right hand corner. A message will appear briefly on screen confirming that the changes have been made successfully.

11. You will receive an email confirming that changes have been made to your bank account details. Your updated details will be live in SuccessFactors from the effective date that you specified. The updated details will also be transferred automatically to the University's payroll system (where required), although there may be a short delay in this happening if the payroll system is locked for editing during the monthly payrun process.

   Note: If you make changes to your bank details after the monthly cut-off date and when the payroll system is locked for editing, your salary instalment for the current month will be paid into your existing bank account. The new bank account details will be used from the following month.

12. If you hold more than one contract/assignment, you will need to update your bank details on each of your other contracts/assignments. To do this, you will see the following symbol to the right of your main search box in the top right hand corner of your home screen:

Indicates multiple contracts/assignments

Click on the person icon and you will see a pop up window that gives you the option to switch between contracts/assignments. Once you have switched to another contract/assignment, you will need to repeat the above process from step 2 onwards. Please ensure you do this for each contract/assignment.

Section B – Line manager/STP team Guidance

People reporting to you are able to update many of their personal details themselves within SuccessFactors. Some of these changes do not require approval (e.g. changes of address, emergency contact details, telephone numbers). However, amendments to certain personal details (i.e. changes of legal names and salutation) will trigger an in-system approval (workflow) being sent to you.

Please see Appendix 1 for full details of which changes require supporting evidence and generate a workflow for your approval - and why this is this case.

You are expected to have seen original evidence of the change in most cases and to check that a copy of this evidence has been uploaded into SuccessFactors before approving any such change. This next section explains step-by-step how you should approve such changes.

Approving changes in personal details
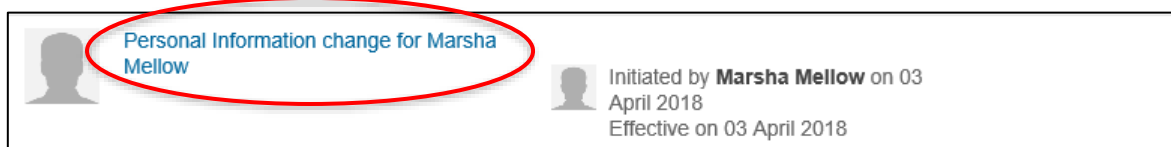
1. When an individual who reports to you has updated their legal name (i.e. their given name and/or family name) or salutation within the **'Personal Details'** section of SuccessFactors, you will receive a notification email, such as the one shown below, informing you that a workflow (in-system approval) is awaiting your review:

2. Log in to SuccessFactors and, on your home page, click on the **'Approve Requests'** tile in your **'To Do'** section:
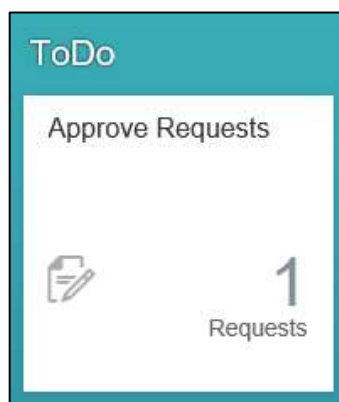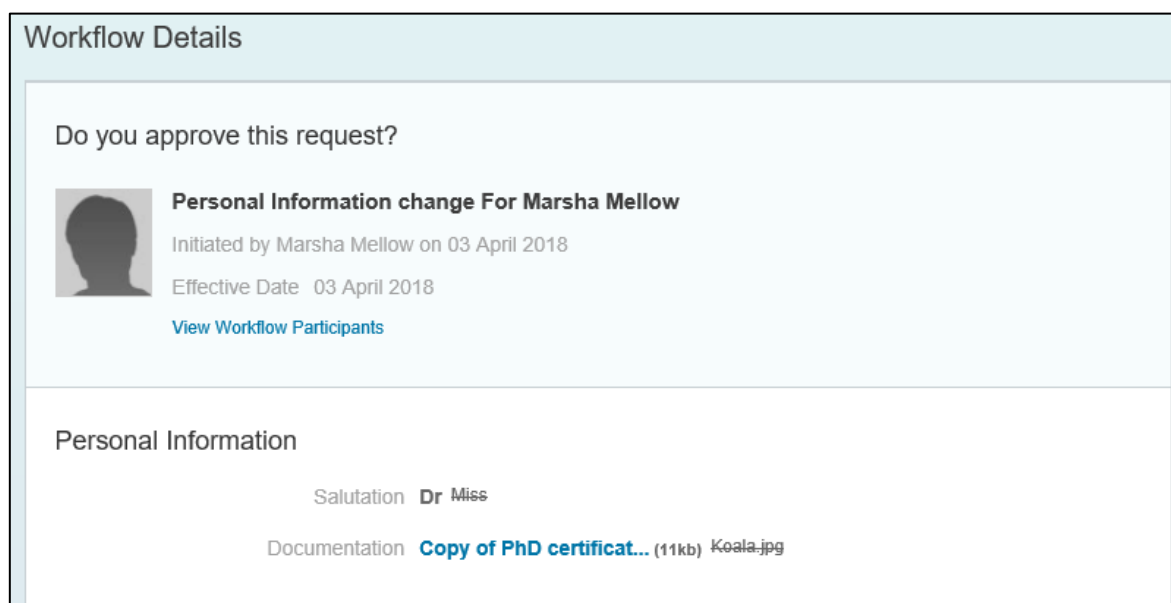
3. You may have more than one workflow listed on your screen if there are other approval requests that you have not reviewed and actioned yet. You can view the details of the relevant personal information change workflow by clicking on the blue hyperlink entitled **'Personal Information change for….'** (circled in red below):

4. You will have been routed to the **'Workflow Details'** screen, where you can see which information has been changed by your direct report. Here, you will also be able to see a copy of the supporting evidence for the change that the individual has uploaded (where required). You can open the document by clicking on the name of the file in the **'Documentation'** field:

Note: Please review Appendix 1 for details of the changes that require supporting evidence to be provided and the types of evidence that are accepted. Before you approve a change that requires supporting evidence, you are responsible for ensuring that you have:
- Seen the original supporting evidence; and
- Checked that a copy of this evidence has been uploaded into SuccessFactors (you will be able to see this as part of the workflow you have received).

5. Type into the comment box that you have seen and checked the original documentary evidence then click on the **'Post'** button to add your comment to the workflow. Your comments will appear on the right hand side of the screen, forming part of the audit trail of the workflow, as shown below:

Workflow Details

Do you approve this request?

Personal Information change For Marsha Mellow

Initiated by Marsha Mellow on 03 April 2018

Effective Date 03 April 2018

View Workflow Participants

Personal Information

Salutation   Dr   Miss

Documentation   **Copy of PhD certificat...** (11kb) Koala.jpg

Comment

Write a comment

Post

Marsha Mellow
Receptionist
Snail Studies (SNAIL)
No Direct Subordinates

Activity

Commented by Liz Timperley-Preece on behalf of Jason Gale on 03 April 2018:

"I confirm that I have seen the original copy of Marsha's PhD certificate, a copy of which has been uploaded into SuccessFactors by Marsha (as seen within this workflow)."

Commented by Liz Timperley-Preece on behalf of Jason Gale on 03 April 2018:

"Congratulations on the award of your PhD, Dr Mellow - very well deserved."

Initiated by Liz Timperley-Preece on behalf of Marsha Mellow on 03 April 2018.

The individual who has made changes to their personal details will receive an email to inform them that a comment has been posted that they may wish to review.

6.   Once you have reviewed the requested change in personal details and any associated supporting evidence, you need to decide whether to approve it, send it back (decline it) or delegate it to someone else to make a decision on. You do this by clicking on the relevant button at the bottom of the screen, although you may wish to add some comments to explain your decision first, particularly if you are doing anything other than approving the request. You should only send back the request where an error has been made (e.g. the change made does not match the supporting evidence provided) or the required supporting evidence has not been uploaded to the system.

a)   If you choose to delegate the request by clicking on the **'Delegate'** button, this will open a new window where you will need to select the person to whom you wish to delegate the request, before clicking on the **'Send'** button.

Delegate Request

Please select a person to whom you want to delegate this request.

Show more information...

No Selection

Joshua Hanks (167540...
Departmental Administr...

Cancel   Send

Both the person you have delegated to, and the person who made the request, will receive an email to notify them about the delegation.

Note: When you use the **'Delegate'** function, the person you are delegating to will be able to see all details contained within the request you have sent to them, regardless of the permissions that they have in the system. They will not, however, have the same access as you outside of the request concerned (unless they do so normally). You are responsible for ensuring that you only delegate workflow requests to a colleague for whom it is appropriate to see the personal data of your direct report and the type of request that they are making. This is vital for enabling compliance with data protection legislation and the University's data protection policy.

b) If you click on **'Approve'** or **'Send back'**, a pop-up message will appear briefly on screen to confirm that you have approved/sent back the request. You will then be routed back to your home page and the request will have disappeared from your **'To Do'** list.

If you have approved a change in an individual's details, a further workflow will be triggered to the Payroll department who will review the request along with the supporting documentary evidence and only when they have approved the workflow will the changes be live in SuccessFactors from the effective date that they specified.

Note: The individual who made the request will receive a notification email to inform them that their request has been approved or sent back. Your department administrator and your local HR administrator will also receive an email notification to highlight what has taken place.
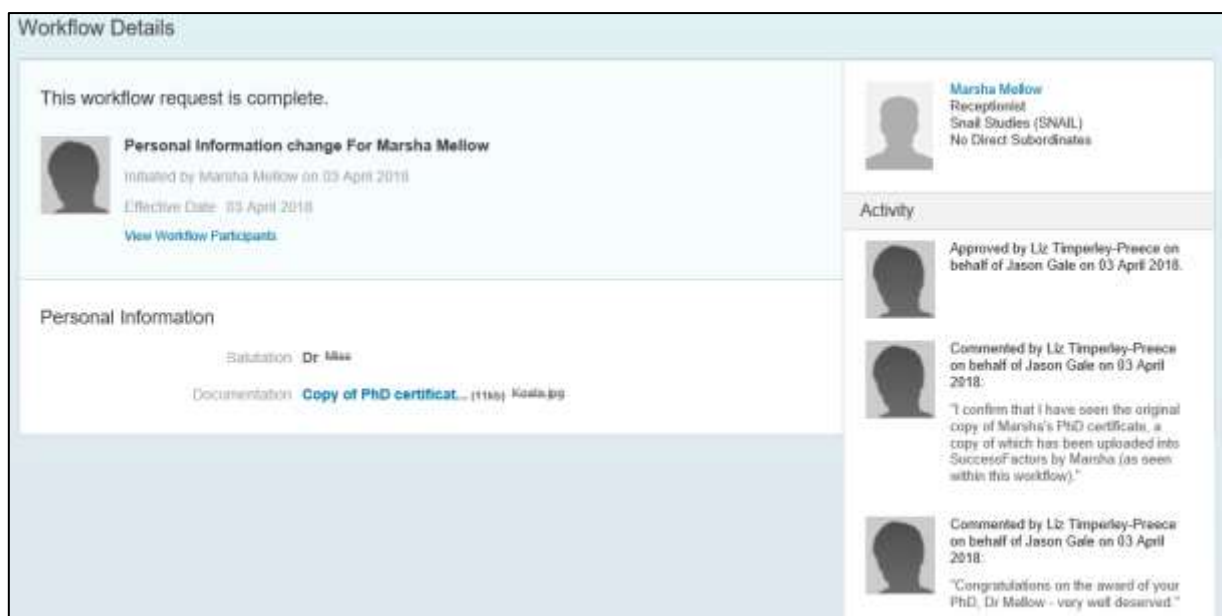
7. If the individual edits their personal details again, or if they further edit and resubmit a change after it has been sent back, you will receive another email to notify you that you have a personal information change awaiting your review (i.e. the process will start again from step 1 in this section).

Section C – Department Administrator and Local HR Administrator Guidance

1. When someone has submitted a change to their given name, family name or salutation in SuccessFactors and their line manager/STP team has approved the change, you will receive a notification email like the one shown below so that you can initiate a change in any local records, as appropriate/necessary:
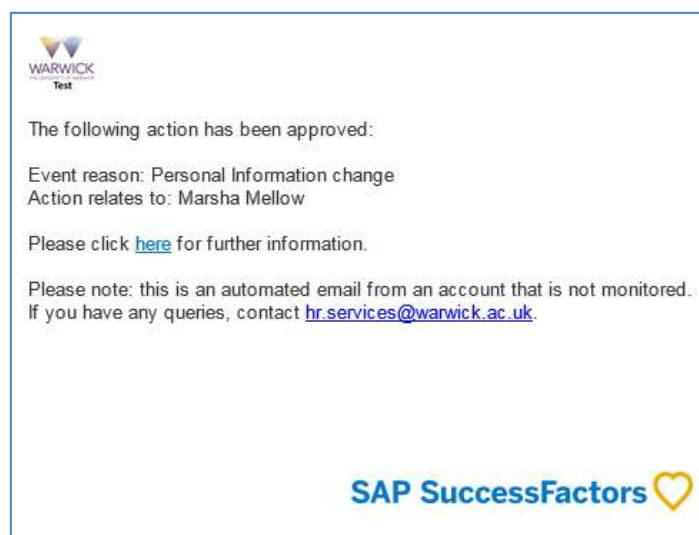
2. Ensure that you are logged in to SuccessFactors before clicking on the hyperlinked word 'here' in the email notification. You will be redirected to the 'Workflow Details' screen, where you will be able to see the details of what has changed and who approved the change:

Note: If supporting documentation has not been uploaded to SuccessFactors (i.e. it is not visible within the **'Documentation'** field shown in the workflow), double-check in Appendix 1 whether this should have been provided before the change was approved by the line manager/STP team. Of all the changes that trigger workflows, it is only certain types of change to salutation that do not need supporting evidence. Where evidence should have been provided but has not been uploaded, please contact the line manager/STP team of the individual to highlight the issue, to request that they arrange for corrective action to be taken and to confirm to you when this has happened.

Appendix 1 – Personal Information Fields in SuccessFactors

Field Name	Description	To be updated by individual in the system?	Supporting evidence needed for a change made in this field?	Does the change trigger a workflow to the line manager/STP team for 'approval'?	Additional information
Salutation	Often known as someone's 'title' (e.g. Dr, Miss, Mr, Mrs, Ms, Mx, Prof).	Yes	No	No	Documentary evidence is not needed for a change to a social salutation (e.g. Miss, Mr, Mrs, Ms, Mx) in line with the advice of the Deed Poll Office. If you wish to change your salutation in a way that may indicate that you have changed your gender identity or legal gender and you have any concerns about this then please contact the Equality, Diversity and Inclusion team via equality@warwick.ac.uk before proceeding further.
Given name	Often known as someone's first name in the UK. Part of your **legal** name.	Yes	Yes	Yes	If you have changed your given name, you will need to show your line manager/STP team an original document that provides evidence of this change (e.g. deed poll certificate, new birth certificate). You should also upload a copy of the document into the system when you edit your given name. Such approval and evidence checking is required because this is a legal change in your identity. If you wish to change your given name in a way that may indicate that you have changed your legal gender and you have any concerns about this (e.g. your line manager/STP team receiving a workflow) then please contact the Equality, Diversity and Inclusion team via equality@warwick.ac.uk before proceeding further.

Field Name	Description	To be updated by individual in the system?	Supporting evidence needed for a change made in this field?	Does the change trigger a workflow to the line manager/STP team for 'approval'?	Additional information
Middle name(s)	Optional field where the individual has additional names that are part of your **legal** name.	Yes	Yes	N/A	If you have changed your middle name, you will need to show your line manager/STP team an original document that provides evidence of this change (e.g. deed poll certificate, new birth certificate). You also need to upload a copy of the document into the system. Such approval and evidence checking is required because this is a legal change in your identity. If you wish to change your middle name(s) in a way that may indicate that you have changed your legal gender and you have any concerns about discussing this with your line manager/STP team then please contact the Equality, Diversity and Inclusion team via equality@warwick.ac.uk before proceeding further.
Family name	Often known as someone's last name or surname in the UK. Part of your **legal** name.	Yes	Yes	Yes	If you have changed your family name, you will need to show your line manager/STP team an original copy of a document that provides evidence of this change (e.g. deed poll certificate, marriage certificate). You also need to upload a copy of the document into the system. Such approval and evidence checking is required because this is a legal change in your identity.
Preferred given name	You can choose to be known as something different from their given name (e.g. Alex rather than Alexandra). This field will otherwise be defaulted to the same as your given name.	Yes	No	No	The header of your profile within SuccessFactors will show your preferred given name. It will also be used when people are looking for you via the search bar on the SuccessFactors home page.
Preferred family name	Individuals can choose to be known as something different from your family name (e.g. where you use your maiden name for professional purposes). This field will otherwise be defaulted to the same as your family name.	Yes	No	No	The header of your profile within SuccessFactors will show your preferred family name. It will also be used when people are looking for you via the search bar on the SuccessFactors home page.

Field Name	Description	To be updated by individual in the system?	Supporting evidence needed for a change made in this field?	Does the change trigger a workflow to the line manager/STP team for 'approval'?	Additional information
Initials	The first letter of your given name and any middle names; used by the University membership system (e.g. for use on your University card).	Yes	Yes	N/A	If you change your 'Given Name' and/or 'Middle Name', you need to update the initials field. This must contain only the first letter of your (legal) given name, not preferred given name, and any middle names. There should be a space between each letter but no punctuation. For example, someone called John Alan Smith would have the initials of 'J A', even if he has a preferred name of Alan.
Country of nationality	The country of which you are a national.	No	Yes	N/A	If you need to change the entry in this field (e.g. because you have now obtained British citizenship), please contact the HR Immigration Team via hr.immigration@warwick.ac.uk.
Legal gender	As there are currently only two legally recognised genders in the UK, this field can only contain male or female.	No	Yes	No	We must hold this information and provide it to HM Revenue and Customs as part of the payroll data we are required to share with them. If you are in receipt of a gender recognition certificate or other proof of a legal change of gender (passport, birth certificate), please contact the Equality, Diversity and Inclusion (ED&I) team (equality@warwick.ac.uk) who will arrange with HR to have your record amended so that any historical records showing your gender assigned at birth are removed[1]. If you have any questions about this process or who will see this information, please contact ED&I.
Gender identity*	Expresses whether or not the gender that you identify with (within the gender choice field) is different from the gender that you were assigned at birth.	Yes	No	No	Please see Appendix 2 for details of how the information recorded in these fields is used and the very limited number of people who can see it other than you.

If you don't want this information to be held, please use the option of 'Prefer not to say'. |
| Gender choice* | The gender that you identify with. This may or may not be different from your legal gender. | Yes | No | No | |
| Sexual orientation* | How you choose to identify your sexual orientation. | Yes | No | No | |

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[1] Note for Central HR Administrators – this can be done via the clock function in the Personal Information section. Please ensure that you edit each of the records shown within the history panel on the left hand-side.

Field Name	Description	To be updated by individual in the system?	Supporting evidence needed for a change made in this field?	Does the change trigger a workflow to the line manager/STP team for 'approval'?	Additional information
Marital status*	How you define your marital status.	Yes	No	No	
Formal name	This controls how your name will appear in the results shown in the search bar at the top of the SuccessFactors home page. It defaults to your preferred given name and preferred family name.	Yes	No	N/A	This field should not be edited; it should be left as the default value (preferred given name and preferred family name).
Date appointed at UoW	The date that your current employment/work-related relationship or association with the University started.	No	N/A	N/A	You cannot and should not need to change this date.
Previous employment*	The type of employment or activity you were undertaking before coming to Warwick.	Yes	No	No	You will have provided this information when you joined the University. You will only need to update it if the field is blank or the value held is incorrect. Please see Appendix 2 for details of how the information recorded in this field is used.
Previous higher education	Where applicable, the name of any higher education institution you worked at before coming to Warwick.	No	No	N/A	This field is not currently being used by the University in SuccessFactors and, therefore, you don't need to update it.
Equal Opportunities sub-section					
Country	This field will always say 'United Kingdom' as we only collect equal opportunities information for the UK.	No	N/A	N/A	This field should not be changed by individuals.
Ethnicity*	How you define your ethnic background.	Yes	No	No	Please see Appendix 2 for details of how the information recorded in this field is used and the very limited number of people who can see it other than you. If you don't want this information to be held, please use the option of 'Prefer not to say'. Please note: if you
Religion/beliefs*	How you identify your religion or beliefs, if any.	Yes	No	No	

Disability?*	Whether you regard yourself as disabled and how you define your disability.	Yes	No	No	record a new disability or a change to your disability, this will not be automatically notified to anyone (including HR). Please see the row below for details of how to inform HR of a disability you are adding/amending.
Field Name	**Description**	**To be updated by individual in the system?**	**Supporting evidence needed for a change made in this field?**	**Does the change trigger a workflow to the line manager/STP team for 'approval'?**	**Additional information**
Share disability details with HR Adviser?	Indicates whether you have asked for the central HR Adviser for your department to be actively informed of any disability that you may have. Please note: your HR Adviser will be able to see your disability information when they look at your record; this field is about recording whether you have specifically asked for them to be informed of your disability so that they can discuss possible support you may need with you.	No	N/A	N/A	It is not currently possible for you to edit this field. If you want the central HR Adviser for your department to be notified of a disability that you have and for this field to be updated, please raise a ticket via the AskHR portal on your SuccessFactors home page (guidance on how to do this is found on the SuccessFactors webpages).

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* Please see Appendix 2 for details of why we collect this information, how it is used and who can see it.

Appendix 2 – Why We Collect Sensitive Personal Information and How We Use It

We invite University employees and those who carry out work for us on a temporary basis to provide certain sensitive personal information about themselves when they join us – these are indicated with an asterisk in Appendix 1. These details are held in within the Personal Information section of the person profile in SuccessFactors and can be accessed and updated by individuals themselves as and when required.

Date of birth is also collected when individuals join us, although this is held in the Biographical Information section of the person profile and cannot be edited by the individual.

The Higher Education Statistics Agency (HESA) tells us what categories we have to use when we collect data. Our use of these categories does not necessarily mean that the University thinks that they are the most appropriate. There is an option for individuals to select "Prefer not to say" for certain sensitive questions.

Why we collect this information and how it is used

We collect these details:

- As the collection of equality monitoring data provides information on how Warwick is meeting the responsibilities set out in the Equality Act 2010. Warwick is committed to tackling discrimination and providing equal opportunities for everybody, striving to create a positive working environment of mutual respect and dignity.

- To ensure appropriate support mechanisms are in place for staff and any requirements for temporary/permanent reasonable adjustments are discussed with individuals.

- As Warwick is a diverse community and takes diversity seriously, this is a key component in recruitment and retention to ensure all staff are valued and able to work in an environment where everyone can be their absolute self.

- As we are required to provide much of this information to HESA without the individual's name being associated with it. HESA gathers information from publicly funded higher education institutions at the request of various government bodies. For information about how this data is used by HESA, please see the HESA Staff Collection Notice page.

- For other legal and/or operational reasons – for example, we are required to hold date of birth details by HM Revenue and Customs and to provide these details to them with the payroll data that has to be shared with them via real-time information (RTI). Further examples can be found in Appendix 1.

The sensitive information indicated with an asterisk in Appendix 1 is used by the University to generate anonymised and aggregated statistics. It will never be reported or published in a form that allows individuals to be identified (except where Marital Status information is required by the pension provider of any scheme of which you are a member or where we are legally required to share it, such as sharing dates of birth with HM Revenue and Customs).

Who can see this information

Access to the sensitive information indicated with an asterisk in Appendix 1 is tightly controlled and only a limited number of individuals in Human Resources can view this where it is necessary as part of their job, and they will treat it with the strictest confidence.