

Personal Information: Edit Contacts Using Bear Trax

All Employees

Introduction

Purpose:

The purpose of this task is to view or manage your Contacts information in Bear Trax so that you can:

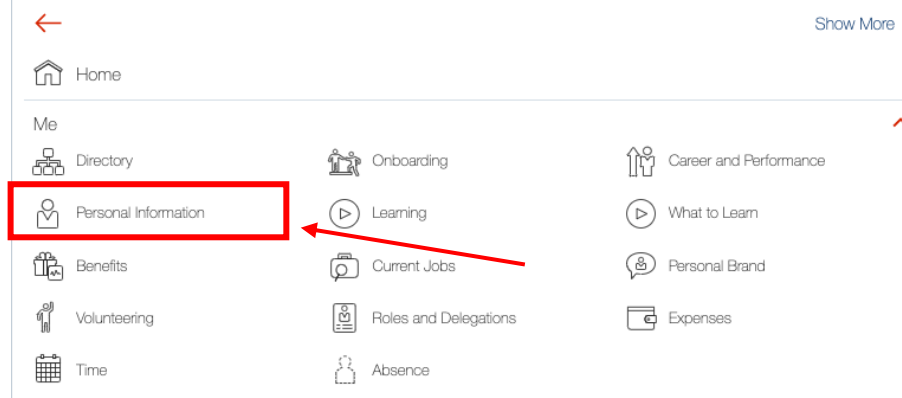
- Add new contacts,
- Edit existing contacts,
- Delete contacts, and
- Designate an emergency contact.

How to Access:

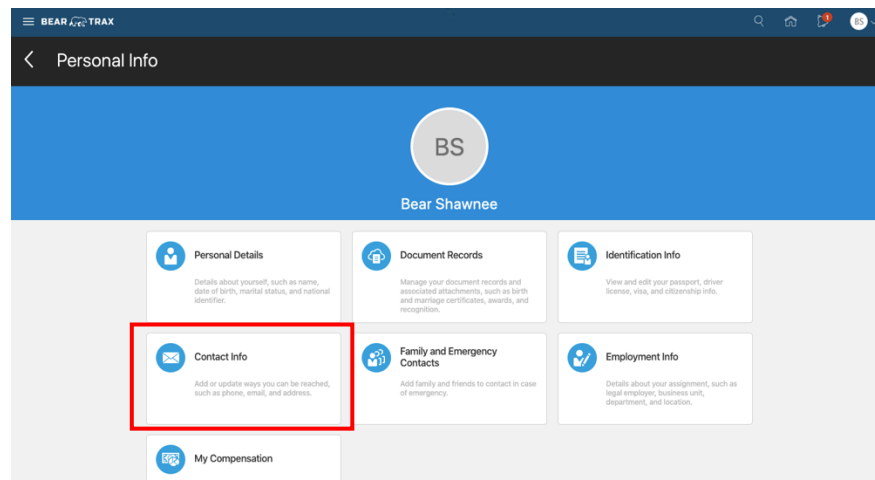
Go to the [Home Page](#) by clicking the  icon.

Click the  Icon.

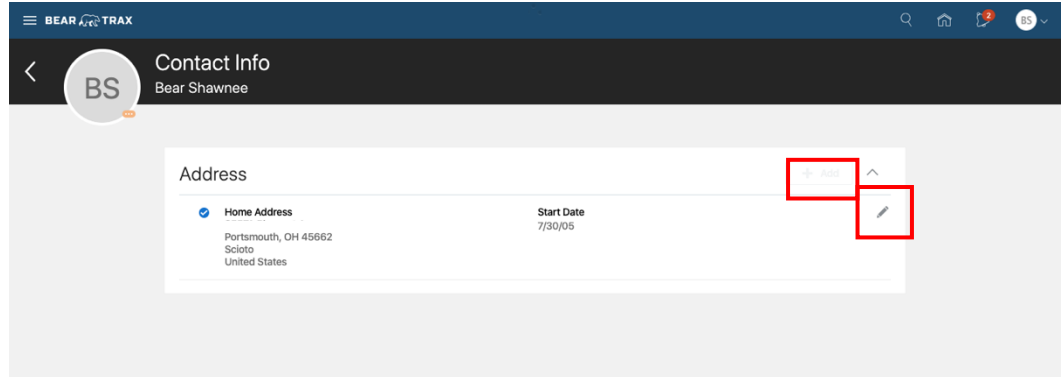
Under “Me,” click “Personal Information.”



Click **Contact Info**.



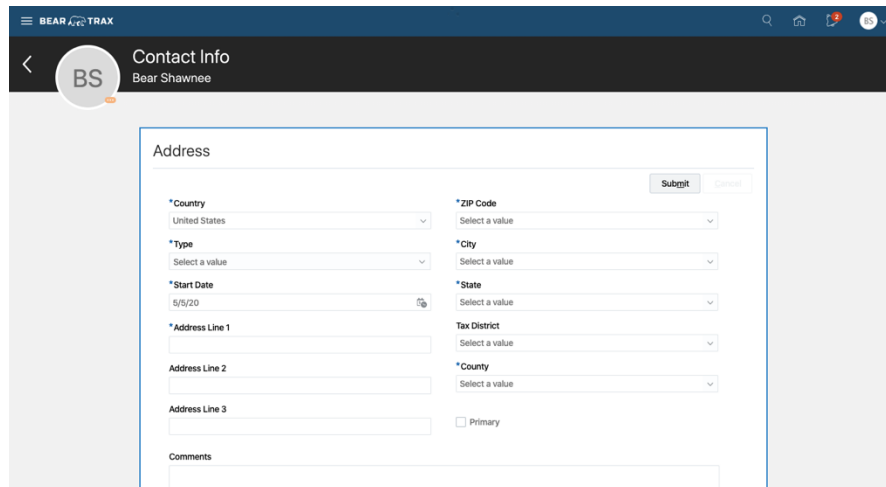
At this screen you can update your current Address or can add a new address for your account.



The screenshot shows the 'Contact Info' page for 'Bear Shawnee'. Under the 'Address' section, there is one entry: 'Home Address' with a start date of '7/30/05'. The address details are 'Portsmouth, OH 45662', 'Scioto', and 'United States'. A red box highlights the 'Add' button (a small upward arrow) and another red box highlights the pencil icon used for editing.

Note: The Add button will appear to be dimmed, once your cursor hovers over it, it is available to click on.

If you're making any changes to your current address, select the pencil icon and make any necessary changes. Once finished click **Submit**.



The screenshot shows the 'Contact Info' page with the address edit form open. The form includes fields for:

- *Country: United States
- *Type: Select a value
- *Start Date: 5/5/20
- *Address Line 1, 2, 3
- *ZIP Code: Select a value
- *City: Select a value
- *State: Select a value
- Tax District: Select a value
- *County: Select a value
- Primary:
- Comments

 Buttons for 'Submit' and 'Cancel' are visible at the top right of the form.

After selecting Add, fill in the necessary fields and select **Submit** to add your new address. Your new address will now appear under Contact Info.

Helpful Hints:

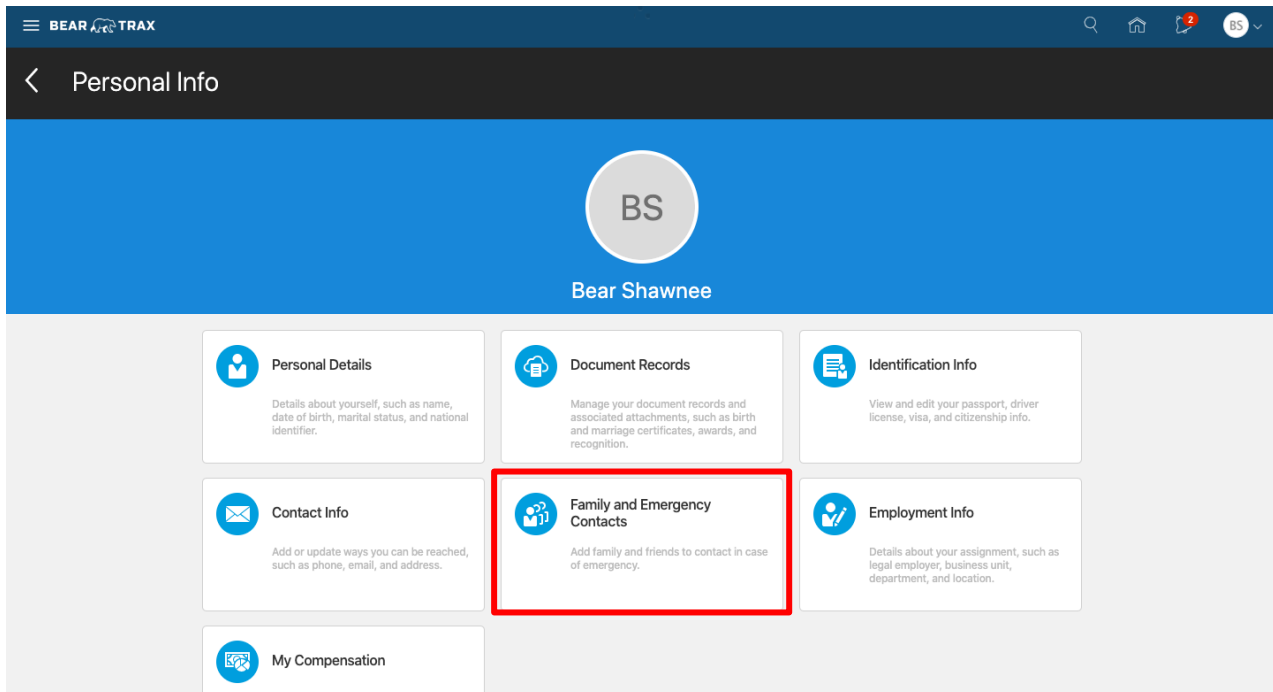
Be sure to keep in mind that...

- A Contact in Bear Trax includes dependents, beneficiaries and/or an emergency contact. From this page you can change information regarding your contacts (including edit current contacts, add new contacts, delete old contacts, designate an emergency contact).
- During Benefits Open Enrollment you will be able to designate contacts to be covered under benefit plans.
- You can select existing personnel in the system as contacts and emergency contacts.
- Always click Submit before exiting the editing page, or your changes will not be saved.
- After changes are made, some may follow a workflow requiring manager or HR approval.
- If you wish to cancel your changes, click Cancel to return to the Personal Information main page.

Procedure: Here are the steps to edit your contacts from the Contacts page:

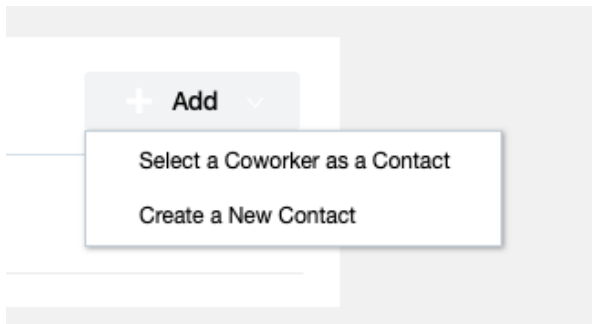
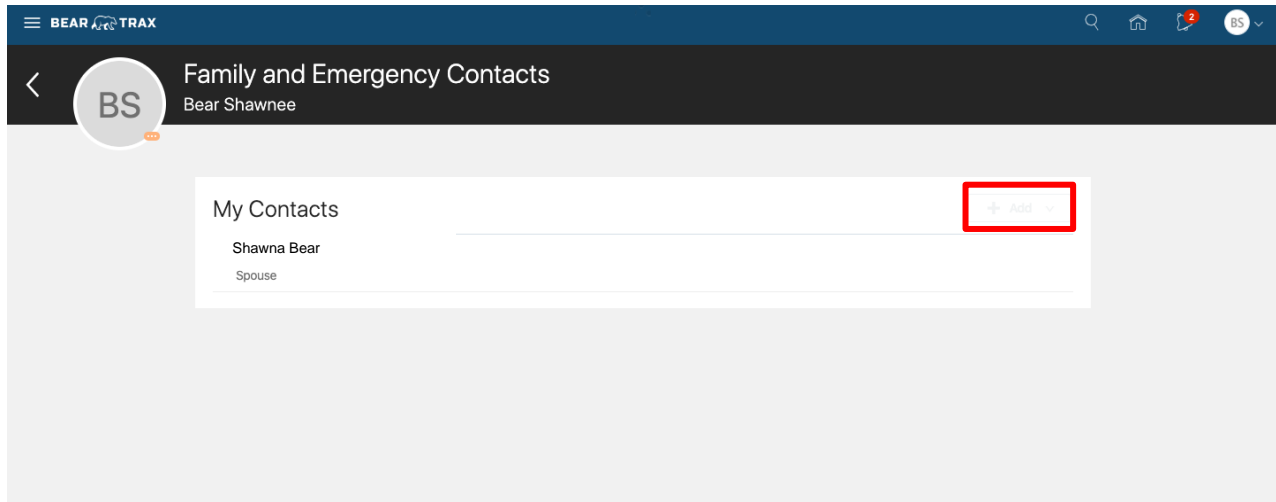
Add a New Contact

Navigate back to the Personal Info page. Select **Family and Emergency Contacts**.



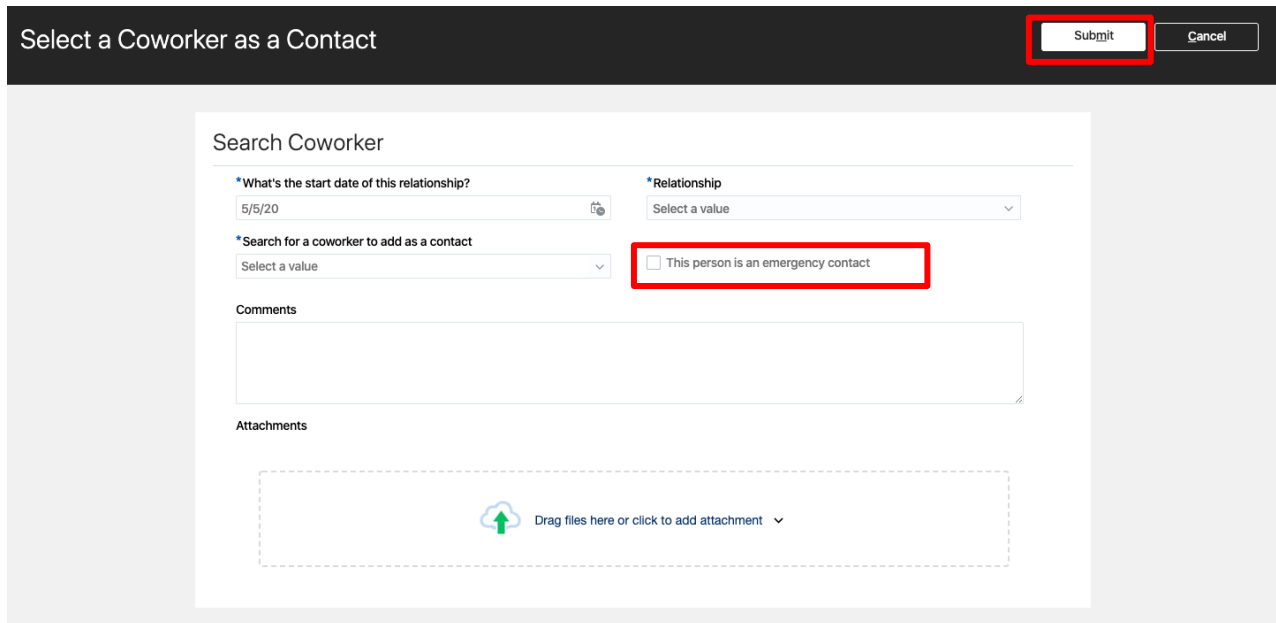
The screenshot shows the 'Personal Info' page in the Bear Trax system. The user is identified as 'Bear Shawnee' with initials 'BS'. The page features several menu items: Personal Details, Document Records, Identification Info, Contact Info, Family and Emergency Contacts (highlighted with a red box), Employment Info, and My Compensation. The 'Family and Emergency Contacts' option includes the description: 'Add family and friends to contact in case of emergency.'

From this page you can see your current contacts. To add a new contact click **Add**.



Note: When you click Add, two drop downs will appear. Select **Create a New Contact** if your new contact isn't an employee of Shawnee State University.

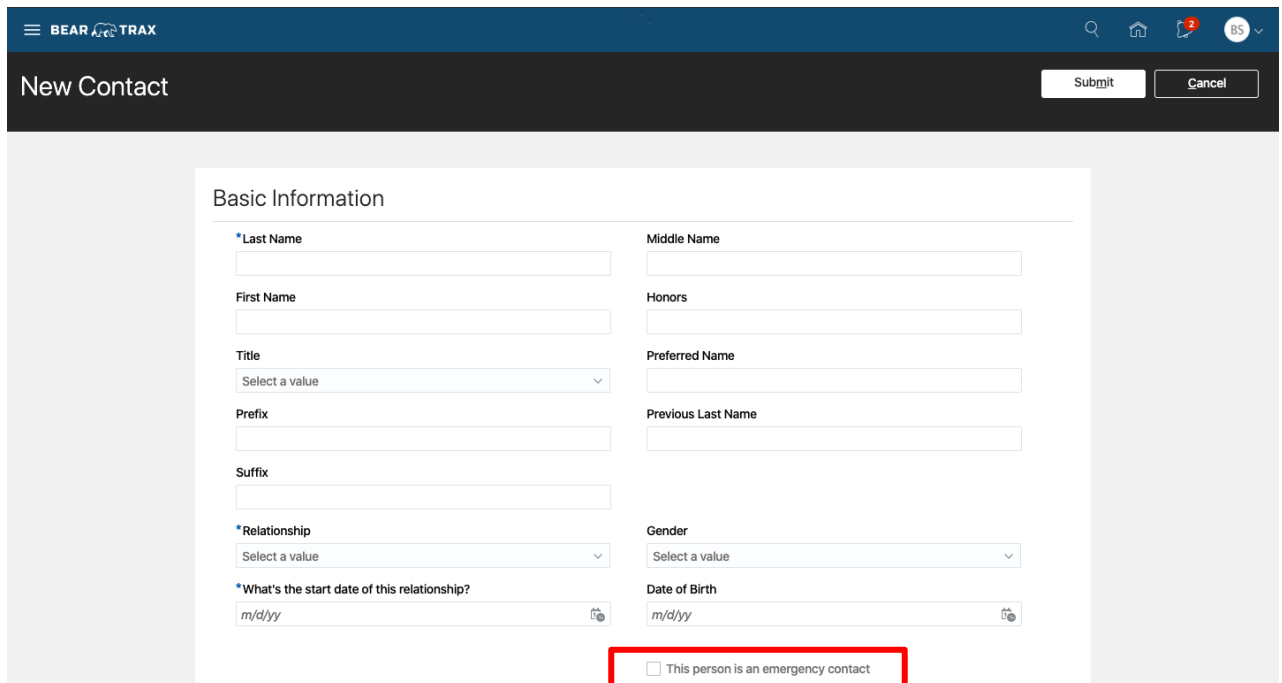
1. If your new contact is an employee of SSU, choose **Select a Coworker as a Contract**. Fill out the necessary fields and select **Submit**.



Note: To designate a contact as an emergency contact, select the box next to *This person is an emergency contact*.

| Field Name | Required / Optional | Description |
|------------------------------|---------------------|--|
| Relationship | Required | Select the relationship of the contact. |
| Relationship Start Date | Required | Select the date this person became a contact. |
| Contact Effective Start Date | Not Editable | Unable to be edited. |
| Name | Required | <ol style="list-style-type: none"> Type the name to search LAST NAME, FIRST NAME or click the drop-down arrow to browse the list Select the individual you would like to add |
| Emergency Contact* | Optional | Check this box to identify this person as an Emergency Contact |
| Country | Not Editable | Unable to edit. |

To add a new who isn't in the system, select **Create a New Contact**.



BEAR TRAX

New Contact Submit Cancel

Basic Information

*Last Name Middle Name

First Name Honors

Title Preferred Name

Prefix Previous Last Name

Suffix

*Relationship Gender

*What's the start date of this relationship? Date of Birth

This person is an emergency contact

Note: To designate a contact as an emergency contact, select the box next to *This person is an emergency contact*.

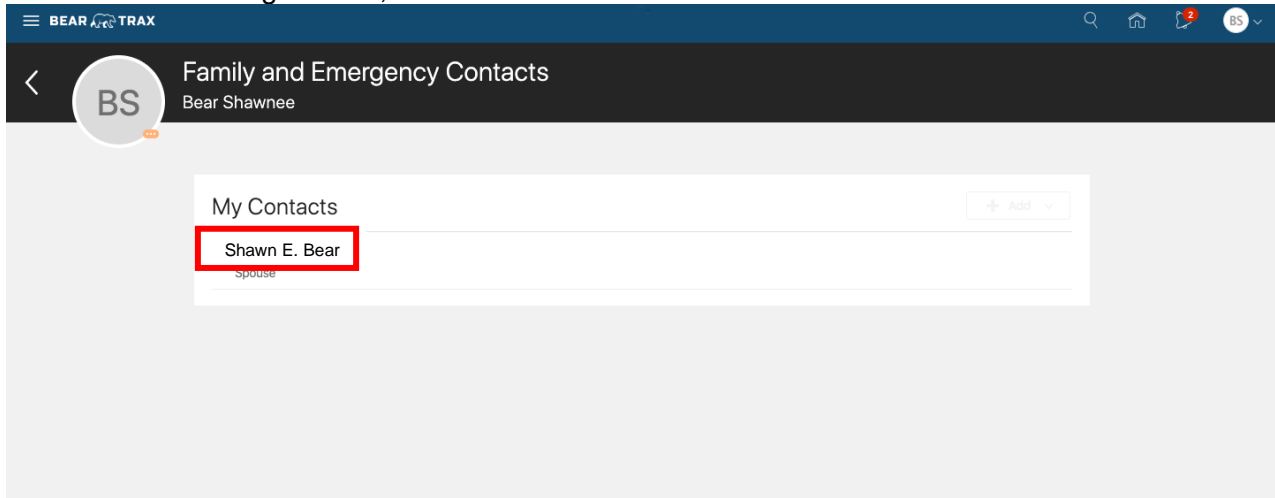
1. Enter the required information and select **Submit**.

| Field Name | Required / Optional | Description |
|------------------------------|---------------------|---|
| Relationship | Required | Click drop-down menu to select the person's relationship to you. |
| Relationship Start Date | Required | Select the date from which the person will be considered a contact |
| Contact Effective Start Date | Not Editable | Unable to be edited |
| Emergency Contact | Optional | Check this box to identify this person as an Emergency Contact |
| Country | Not Editable | Unable to be edited |
| Global-Name Language | Not Editable | Unable to be edited |
| Last Name | Required | Enter full legal last name |
| First Name | Optional | Enter full legal first name |
| Title | Optional | Preferred title of individual, drop-down menu |
| Prefix | Optional | Preferred prefix |
| Suffix | Optional | Preferred suffix |
| Middle Name | Optional | Enter full middle name |
| Honors | Optional | Fill in any obtained honors |
| Preferred Name | Optional | Enter full preferred first name or nickname |
| Previous Last Name | Optional | Enter full preferred last name |
| Gender | Optional | Select from drop-down menu. Required for dependents covered under benefit plans |
| Date of Birth | Optional | Enter birthdate or select from calendar. Required for dependents covered under benefit plans |
| E-Mail | Optional | Enter person's email address |
| National ID | Optional | Enter data in three fields: <ol style="list-style-type: none"> Country: search and select the appropriate country National ID Type: select ID types from drop down list National ID: enter the individual's National ID in appropriate format |

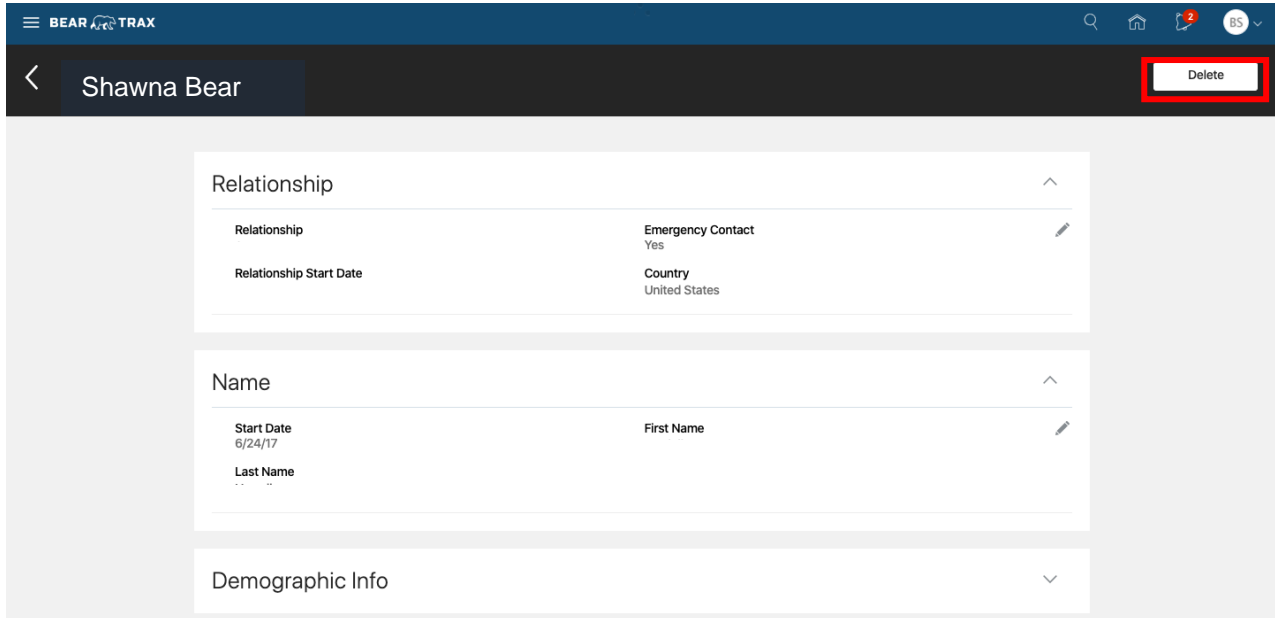
| Field Name | Required / Optional | Description |
|---------------|---------------------|---|
| Phone Numbers | Optional | <p>Click the “plus” icon next to Phone Numbers. Three fields will appear:</p> <ol style="list-style-type: none"> 1. Check the Primary checkbox to designate the person as a primary contact 2. Select option from drop-down menu for Type of phone number 3. Enter Number 3. Select country code, then area code, and the last seven digits of the phone number |
| Address | Optional | <p>Click the “plus” icon next to Address.</p> <ol style="list-style-type: none"> 4. Complete required fields, marked by asterisks (*). |

Delete an Existing Contact

To delete an existing contact, select the same of the contact from the list. Then select **Delete**.



The screenshot shows the BEAR TRAX mobile application interface. At the top, there is a navigation bar with the BEAR TRAX logo and user profile information (BS). Below this is a header for 'Family and Emergency Contacts' for 'Bear Shawnee'. The main content area displays 'My Contacts' with an 'Add' button. A single contact, 'Shawn E. Bear', is listed with the relationship 'Spouse' indicated below the name. The name 'Shawn E. Bear' is highlighted with a red rectangular box.



BEAR TRAX

Shawna Bear Delete

| Relationship | |
|-------------------------|--------------------------|
| Relationship | Emergency Contact Yes |
| Relationship Start Date | Country United States |

| Name | |
|-----------------------|------------|
| Start Date 6/24/17 | First Name |
| Last Name | |

Demographic Info

NOTE: Be sure you have one contact designated as an emergency contact.

Final Notes

By following these steps, you have made changes to your contacts. All new changes are displayed on the main Personal Information page and the Contacts information page.