Standard Operating Procedure for Marital Status/Name Change

1. **1.** Run NMS_HR_SELF_SERVICE_APPROVALS to see if there are any outstanding marital status update requests that need our attention. Navigation: Reporting Tools- Query-Query Viewer- enter the query name “NMS_HR_SELF_SERVICE_APPROVALS” in the “Search by” field.
2. Run as Excel
3. Download the Excel spreadsheet. Filter first row. Filter out the business units you need which are 21800, 21801, 21500. Filter column G for dates you are trying to audit.
4. Add column J for AOC HRD Audit Notes
5. Save as NMS_HR_SELF_SERVICE_APPROVALS_(date) to K:\AUDIT incl Exceptions\Marital Status, Name Change and Address Change Audit\2021
6. Look at the dates that the employee requested and what they are changing
7. If you find someone who has changed their marital status/ name change using the employee self-serve and they come up on the audit report then AOC HRD must confirm that they have completed the following items and submitted them to HR (look in their employee file) before sending them the forms to fill out.
8. Documents you will look for are
    1. New PERA Forms: **Beneficiary Designation Form, and Change in PERA Records Form**
    2. New Personal Data Form: updating personal contact, and address/phone, if it changed
    3. Required – a copy of the Marriage certificate or Divorce Decree
    4. Insurance Enrollment Change Form dropping or adding spouse, children, stepchildren, etc., and this is a qualifying event for the employee to make changes but they only have 31-days to do so.
    5. The Harford Beneficiary Designation change form
    6. A copy of the Driver's License unless documents sent from the employee’s NMJB email address
9. If the query shows employees who have made a change you will obtain the proper documentation or request further documentation then approve the change in SHARE.
10. Approve the change(s) in SHARE
11. Workforce Administration > Self Service Transactions > Marital Status Changes or Name Changes
12. Enter Search Criteria > Employee ID
13. Click Search
14. Click on the desired search result
15. Select > ‘Select this option to approve the transaction and automatically update the database’ radio button
16. Click > Save
17. The message ‘The following information has been saved.’ displays
18. Verify updates/changes are made to the Personal Information > Modify a Person section of SHARE.