

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:

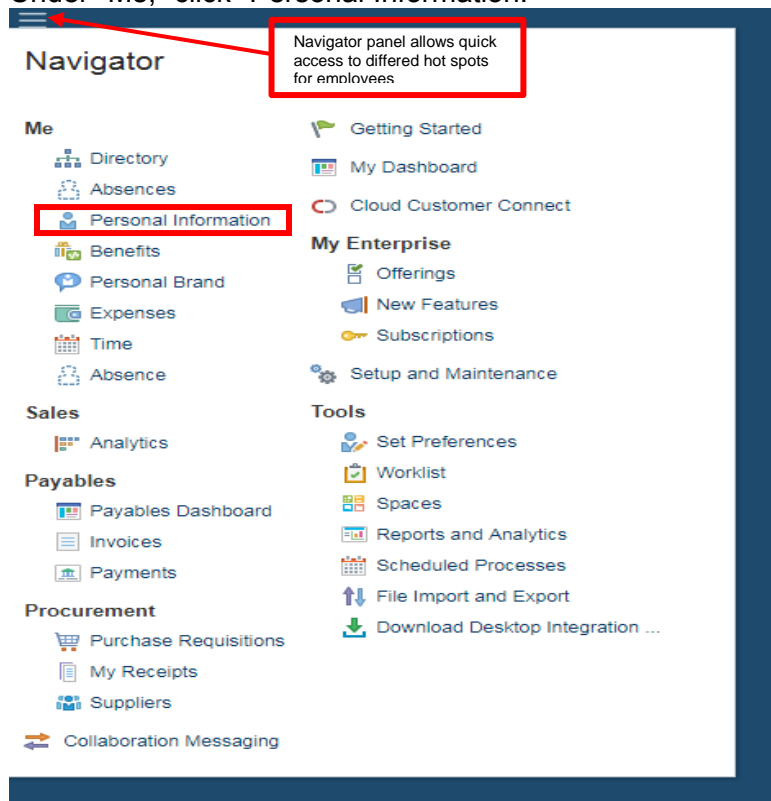
- Add new contacts,
- Edit existing contacts,
- Delete contacts, and
- Designate an emergency contact.

How to Access:

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


Click the  Icon.

Under “Me,” click “Personal Information.”

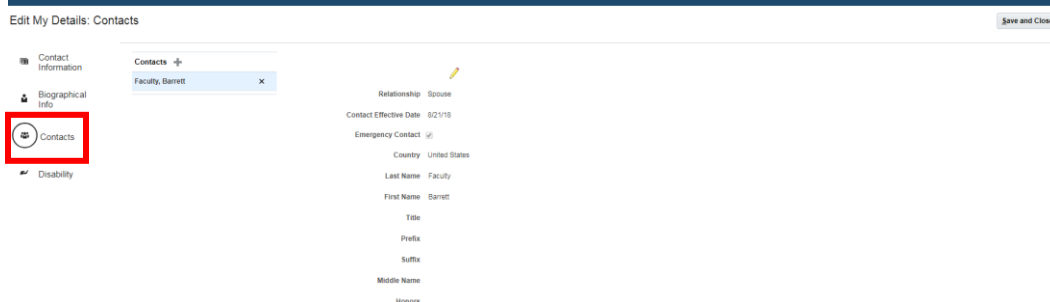


View My Details under your Personal Information



Click the  button. From this page, you can view and edit your personal information.

Click the icon on the left to access the Contacts page.



From this page, you can view and edit your contacts.

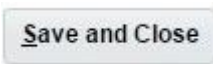


Helpful Hints:

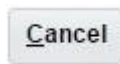
Be sure to keep in mind that...

- 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  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.

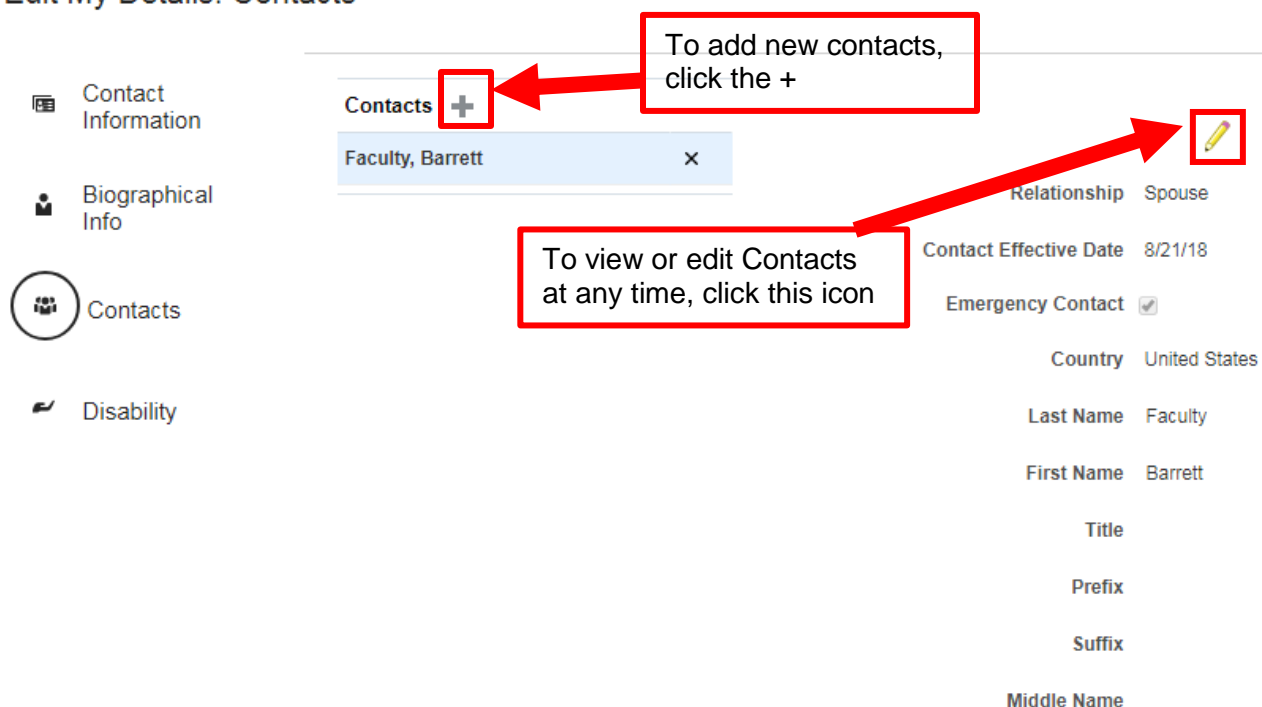


- If you wish to cancel your changes, click  to return to the Personal Information main page.

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

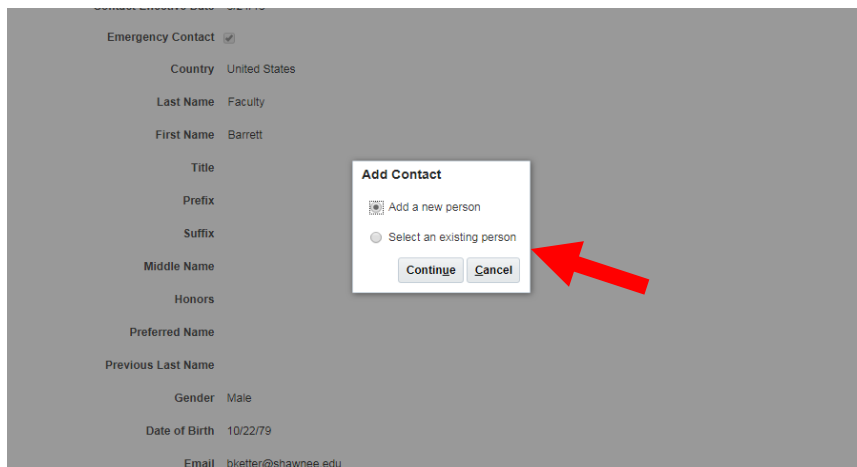
Add a New Contact

Edit My Details: Contacts



The screenshot shows the 'Edit My Details: Contacts' page. On the left is a sidebar with icons for 'Contact Information', 'Biographical Info', 'Contacts' (highlighted with a red circle), and 'Disability'. The main content area has a 'Contacts' header with a red '+' icon and a list of contacts, including 'Faculty, Barrett' with a red 'x' icon. To the right is a form for editing a contact, with fields for 'Relationship' (Spouse), 'Contact Effective Date' (8/21/18), 'Emergency Contact' (checked), 'Country' (United States), 'Last Name' (Faculty), 'First Name' (Barrett), 'Title', 'Prefix', 'Suffix', and 'Middle Name'. Red arrows and boxes highlight the '+' icon and the 'x' icon, with text boxes explaining their functions: 'To add new contacts, click the +' and 'To view or edit Contacts at any time, click this icon'.

1. Click the **+** icon to add a new contact.
2. A popup window will appear, allowing you to choose to either create a new person, or to select an existing person (i.e. an employee).



The screenshot shows the 'Add Contact' popup window. It has two radio buttons: 'Add a new person' (selected) and 'Select an existing person'. Below the radio buttons are 'Continue' and 'Cancel' buttons. A red arrow points to the 'Select an existing person' option. The background shows a partial view of the contact form from the previous screenshot.

3. To add a *new* contact that does not exist within the system, select the “Add a new person” option shown above, and click “Continue.”
4. As required, complete/review/change the following fields:

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

Field Name	Required / Optional	Description
National ID	Optional	Enter data in three fields: <ol style="list-style-type: none"> 1. Country: search and select the appropriate country 2. National ID Type: select ID types from drop down list National ID: enter the individual's National ID in appropriate format
Phone Numbers	Optional	Click the "plus" icon next to Phone Numbers. Three fields will appear: <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	Click the "plus" icon next to Address. <ol style="list-style-type: none"> 4. Complete required fields, marked by asterisks (*).

5. When finished, click

Save and Close

Edit My Details: Contacts

[Save and Close](#) [Cancel](#)

- Contact Information
- Biographical Info
- Contacts**
- Disability

Contacts +

Faculty, Barrett

Walters, Jon

Relationship Brother
Contact Effective Date 9/17/18
Emergency Contact ☐
Country United States
Last Name Walters
First Name Jon
Title
Prefix
Suffix
Middle Name
Honors
Preferred Name
Previous Last Name
Gender Male
Date of Birth 8/7/78
Email jwalters@yahoo.com
National ID
Country United States
National ID Type Social Security Number
National ID 825-79-9825

Newly added contact

Phone Numbers

Primary	Type	Number
<input checked="" type="checkbox"/>	Work Mobile Ph...	United States 1 740 000-0000

Address

Type Home Address
Effective Start Date 3/29/17
Country United States
Address Line 1 1111 Somewhere St.
Address Line 2 Apartment 404
City Portsmouth
State OH
ZIP Code 45662
Tax District
County Scioto

Newly added contact info

6. If choosing an **existing** person in the Bear Trax system,

* Relationship

* Relationship Start Date 9/17/18

Contact Effective Start Date 9/17/18

* Name

Emergency Contact ☐

Country United States

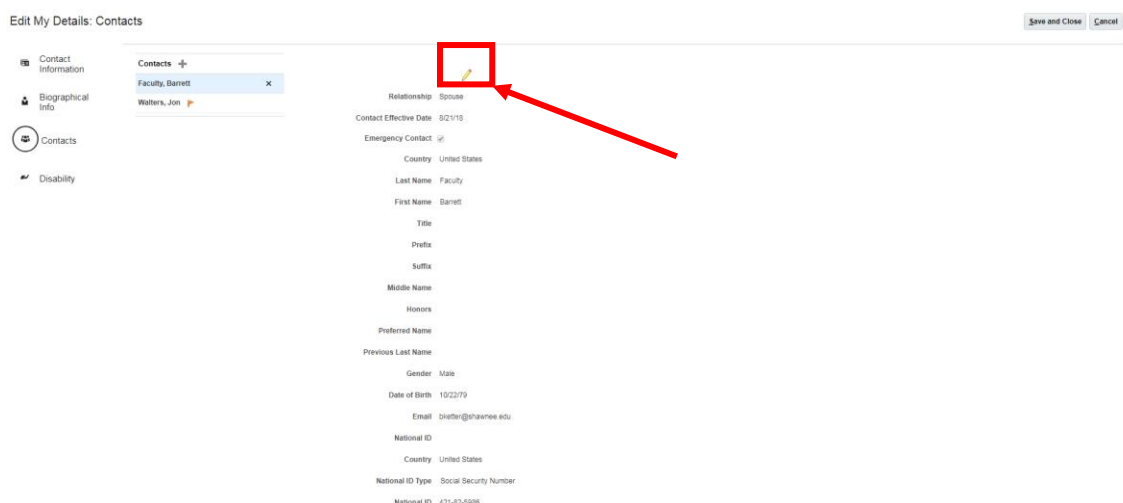
- a. Select the option and click "Continue."
- b. As required, complete/review/change the following fields:

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"> 1. Type the name to search LAST NAME, FIRST NAME or click the drop-down arrow to browse the list 2. 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.

7. When finished click

Save and Close

Edit an Existing Contact



Edit My Details: Contacts

Contacts

- Faculty, Barnett
- Walters, Jon

Relationship Spouse

Contact Effective Date 5/21/10

Emergency Contact ☐

Country United States

Last Name Faculty

First Name Barnett

Title

Prefix

Suffix

Middle Name

Honors

Preferred Name

Previous Last Name

Gender Male

Date of Birth 10/22/79

Email dbarnett@shawnee.edu


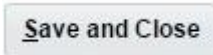
National ID

Country United States





National ID Type Social Security Number

National ID 421-62-5996



Save and Close **Cancel**


1. Click the  icon next to the person you would like to edit.
2. Make changes as necessary.
3. Once finished, click .

Delete an Existing Contact

 Contact Information
 Biographical Info
 **Contacts**
 Disability

Contacts +

Faculty, Barrett	
Walters, Jon	



Relationship Spouse

Contact Effective Date 8/21/18

Emergency Contact ☒

Country United States

Last Name Faculty

First Name Barrett


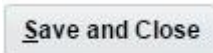
Title

Prefix

Suffix

Middle Name


Honors


1. Select the  icon next to the contact's name. Proceed to confirm deletion.
2. Once finished, click .
3. Be sure you have one contact designated as an emergency contact.


Designate an Emergency Contact


1. Check the Emergency Contact box to designate the person as your Emergency Contact.

Edit My Details: Contacts

 Contact Information

 Biographical Info

 Contacts

 Disability

Contacts +

Faculty, Barrett x

Walters, Jon

Relationship

Spouse

Contact Effective Date

8/21/18

Emergency Contact ☒

Country

United States

Last Name

Faculty

First Name

Barrett

Title

Prefix

Suffix

Middle Name

Honors

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.