

## Instructions for Updating Personal Profile Information in SAP Self-Services

The Personal Profile link in Self-Services is where you enter your addresses for mailing and tax purposes as well as you enter your family member/dependents information for health (medical, dental and vision) insurance coverage or to enter the beneficiary information for life insurance and savings plans. You need to enter your family member/dependent information **first** before they can be selected as eligible dependent or beneficiary.

Before you begin entering your family member/dependent information through Self-Services, please have the following **required** information on hand. This will save you time in going through this process.

- Family Member/Dependent Full Name (First, Middle Initial, Last and Suffix).
- Gender
- Birth Date
- Social Security Number (9 digits) – required by insurance companies for eligibility and identification
- Address – if **different** from employee
- Telephone Number – if **different** from employee
- Medical Doctor's Name and Office Number
- Dental Doctor's Name and Office Number

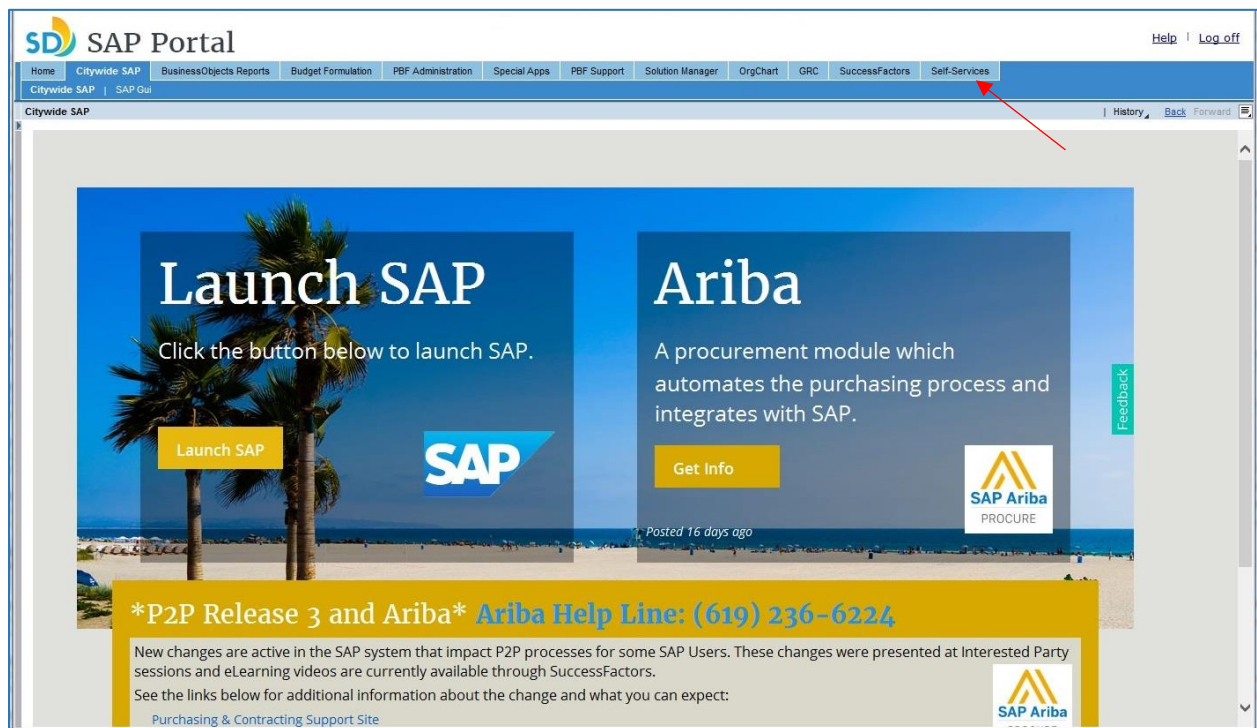
The City requires documents when covering these dependents for **health and life** insurance coverage:

- Spouse – Marriage Certificate
- Domestic Partner – State Registration or Notarized Affidavit of Domestic Partner Relationship
- Children – Birth Certificate
- Children of Domestic Partner – Birth Certificate
- Adopted Child – Birth Certificate and Adoption Papers
- Grandchildren – Birth Certificate and Court Ordered legal document for insurance purpose

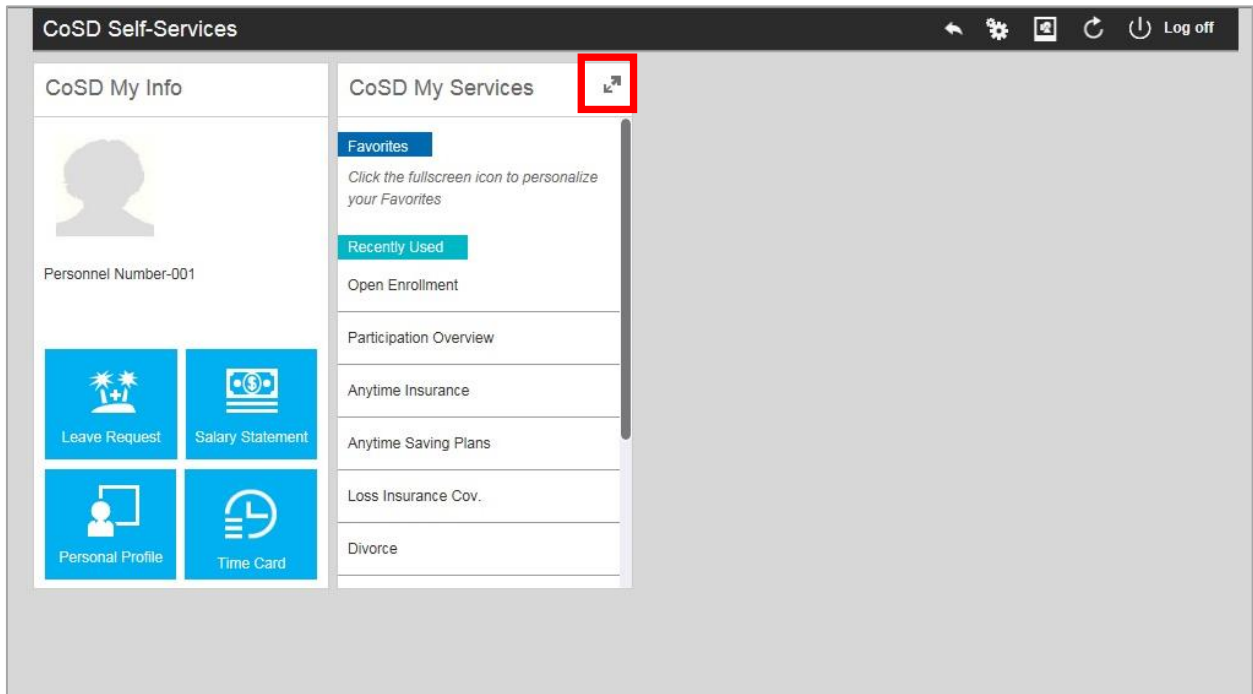
**REMINDER: To ENROLL your dependents after open enrollment due to a qualifying event, you need to contact Risk Management/Benefits Staff at (619) 236-5924. Adding your dependents on the Personal Profile link does NOT enroll your dependent(s) to your health benefits. If you failed to contact Benefits staff within 30 days from qualifying event, your dependents cannot be added until next open enrollment period.**

## To access the Personal Profile link:

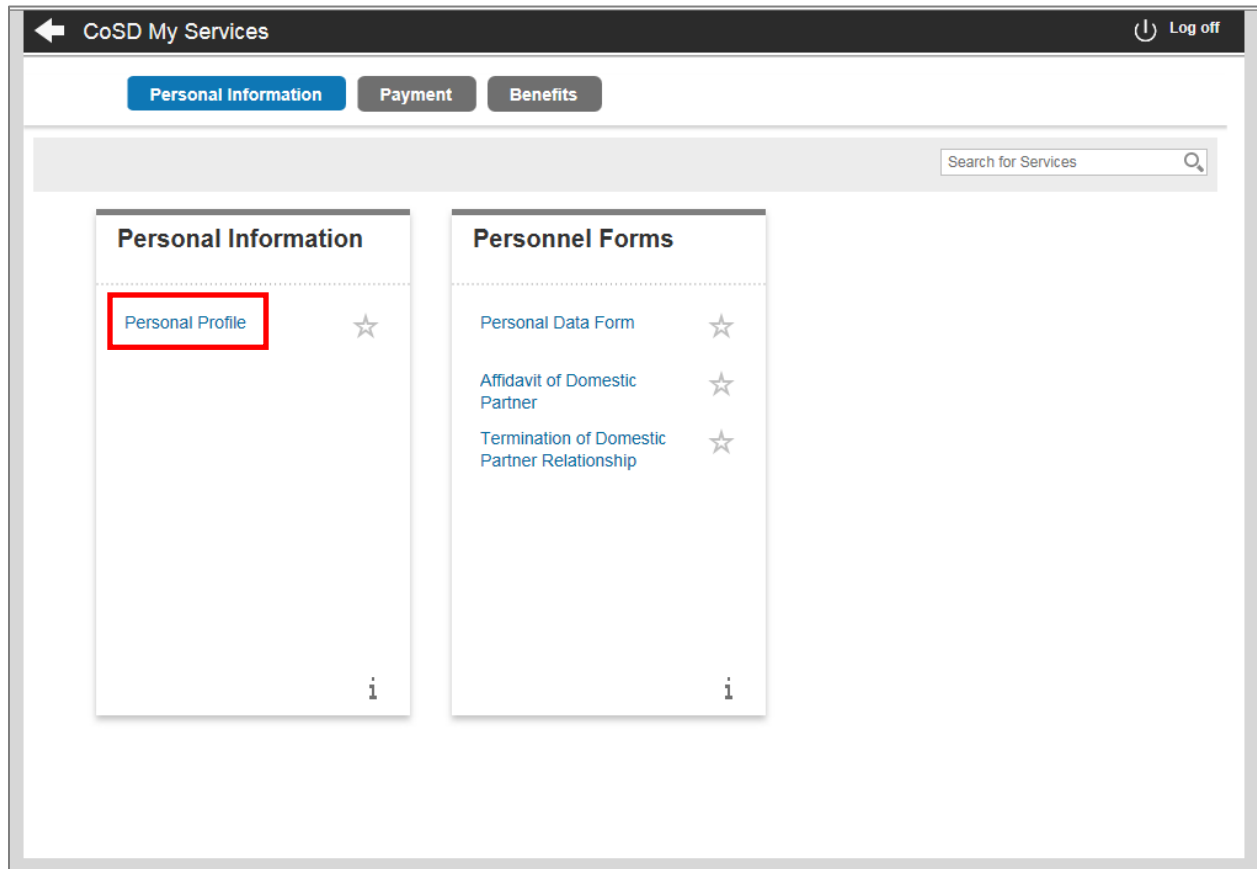
1. Click on the Self-Services tab in the SAP Portal.



2. Click on the double-arrows on the “CoSD My Services” tile (shown in the red box below) to switch to full screen mode.



3. Once in the CoSD My Services expanded page, click on the Personal Profile link shown below.



## To add a Family Member/Dependent:

1. Once on the Personal Profile screen, you click on the “Add” button to add a Family Member/Dependent, as shown in the screenshot below. This will populate the relationship menu.

The screenshot displays the 'Personal Profile' interface. On the left, there are sections for 'Addresses' (with sub-sections for Permanent residence, Benefits address, and Mailing address), 'Communication' (showing 'No data available'), and 'Personal Data' (with fields for Full name and SSN). On the right, the 'Family Members / Dependents' section is active, featuring a red-bordered 'Add' button. Below this button, there are three categories: 'Spouse', 'Child', and 'Other Beneficiary', each with fields for Name, Date of Birth, and Valid From. At the bottom right, the 'Bank Information' section is visible, including a 'Main bank' entry with fields for Payee, Bank name, and Bank Account.

2. From the drop-down menu, select the appropriate relationship.

Impact Training SAP Portal QE1-600 DE1-302

Page Safety Tools

**Family Members / Dependents** Add

	Name:	Date of Birth:	Valid From:
<b>Spouse</b>			
<b>Child</b>			
<b>Other Beneficiary</b>			

Spouse  
Divorced spouse  
Father  
Mother  
Domestic Partner  
Child of Domestic Partner  
Registered Partner  
**Child**  
Legal guardian  
Dependent of a Minor Dependent  
Ward of Legal Guardian  
Stepchild  
Grandchild  
Other Beneficiary  
Living Trust

**NOTE:**

- Use "Other Beneficiary" for brother, sister, aunt, uncle, friend, or any association not in the drop-down, in order to name them as beneficiary.
- When designating "Living Trust", enter the Living Trust document name as shown on your Living Trust.

3. Enter the family member/dependent's information:
  - i. First Name
  - ii. Last Name if Different from Employee's Last Name
  - iii. If dependent has a suffix, please choose from the drop down button in the "Title" field
  - iv. Date of Birth
  - v. Address
  - vi. Social Security Number – 9 digits – **Required for dependents to be enrolled for health and life insurance benefits.** Dependents without social security number will be denied benefits. Newborns will be allowed to be added without social security #. However, you have to apply for a social security number for your dependent(s) and enter the social security information in Self-Services once acquired.
  - vii. Validity Date

**Add Child**

Save and Back Save Cancel

**Name**

\* First Name: John

\* Last Name: Smith

Title: [v]

**Physicians**

Physician 1: Dr. Jane Doe

ID Number: 70414

Physician 2: [v]

ID Number: [v]

**Challenge**

Challenge: [v]

Disability Date: [v]

Notification Date: [v]

**Status**

Student: [v]

Medicare: [v]

Smoker: [v]

Military Service: [v]

Financially Independent: [v]

**Validity**

☒ Valid as of Today

☐ Valid From [v] [v]

☐ Valid From/To [v] [v]

**Data At Birth**

Date Of Birth: 5/11/2017 [v]

Gender: ☐ Female ☒ Male ☐ Undeclared

**Address**

Country: USA [v]

House Number And Street: 1111 Main Street

Address Line 2: [v]

City: San Diego

State: California [v]


ZIP Code: 92101

Telephone: [v] [v]

**Other Personal Data**

Social Security Number: 555-55-5555

Reference Personnel Number: [v]

Once information entry is complete, hit either the "Save" button or "Save and Back" button to save entries. Green check mark will appear in top left of screen if saved successfully.  Data saved successfully

4. Newly added information will now populate on the Personal Profile screen.

Personal Profile

✓ Data saved successfully

Addresses

Permanent residence (For Income Tax Use)

Street Name:  
City:  
Telephone Number:

Benefits address (Req for HMO Plans)

Street Name:  
City:  
Telephone Number:

Mailing address (For Official City mail)

Street Name:  
City:  
Telephone Number:

Communication

No data available

Family Members / Dependents

Add

Spouse

Name:  
Date of Birth:  
Valid From:

Child

Name:  
Date of Birth:  
Valid From:

Name: Smith John  
Date of Birth: 05/11/2017  
Valid From: Today

Other Beneficiary

Name:  
Date of Birth:  
Valid From:

Name:  
Date of Birth:  
Valid From:

Personal Profile Instructions

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## To modify a Family Member/Dependent's information:

1. From the Personal Profile screen, click on the "edit" button next to the Family Member/Dependent you need to make changes to, as shown in the screenshot below. This will launch the edit screen.

**Personal Profile**

**Addresses**

**Permanent residence (For Income Tax Use)**

Street Name: 1234 Main Street  
City: San Diego  
Telephone Number: 5555551234  
Valid From: Today

**Benefits address (Req for HMO Plans)**

Street Name: 1234 Main Street  
City: San Diego  
Telephone Number: 5555551234  
Valid From: Today

**Mailing address (For Official City mail)**

Street Name: 1234 Main Street  
City: San Diego  
Telephone Number: 5555551234  
Valid From: Today

**Family Members / Dependents**

**Spouse**

Name: Smith John  
Date of Birth: 02/21/1966  
Valid From: 06/23/2010

**Mother**

Name: Doe Jane  
Date of Birth: 06/12/1941  
Valid From: 06/23/2010

**Bank Information**

**Main bank**

Payee: Jane Smith  
Bank name: SAN DIEGO METROPOLITAN CREDIT UNION  
Bank Account: 0000000055555555

**Benefits Medical Information**

No data available

**Personal Data**

No data available

2. Edit the applicable information in the edit screen.

### Edit Spouse

Save and Back
 Save
 Cancel

#### Name

\* First Name:

\* Last Name:

Title:

#### Physicians

Physician 1:

ID Number:

Physician 2:

ID Number:

#### Challenge

Challenge: ☐

Disability Date:

Notification Date:

#### Status

Student: ☐

#### Data At Birth

Date Of Birth:

Gender:

#### Address

Country:

House Number And Street:

Address Line 2:

City:

State:

ZIP Code:

Telephone:

#### Other Personal Data

Social Security Num:

Reference Personnel Num:

Once information entry is complete, hit either the “Save” button or “Save and Back” button to save entries. Green check mark will appear in top left of screen if saved successfully. Data saved successfully

3. Newly edited information will now populate on the Personal Profile screen.

**Personal Profile**

✓ Data saved successfully

**Addresses**

**Permanent residence (For Income Tax Use)**

Street Name: 1234 Main Street  
City: San Diego  
Telephone Number: 5555551234  
Valid From: Today

**Benefits address (Req for HMO Plans)**

Street Name: 1234 Main Street  
City: San Diego  
Telephone Number: 5555551234  
Valid From: Today

**Mailing address (For Official City mail)**

Street Name: 1234 Main Street  
City: San Diego  
Telephone Number: 5555551234  
Valid From: Today

**Communication**

No data available

**Family Members / Dependents**

**Spouse**

Name: Smith James  
Date of Birth: 02/21/1966  
Valid From: 06/23/2010

**Mother**

Name: Doe Jane  
Date of Birth: 06/12/1941  
Valid From: 06/23/2010

**Bank Information**

**Main bank**

Payee: Jane Smith  
Bank name: SAN DIEGO METROPOLITAN CREDIT UNION  
Bank Account: 0000000055555555

**Benefits Medical Information**

No data available

## To modify your address:

1. From the Personal Profile screen, click on the “edit” button next to address to be edited, as shown in the screenshot below. This will launch the edit screen.


The screenshot displays the 'Personal Profile' interface. On the left, under the 'Addresses' section, there are three entries: 'Permanent residence (For Income Tax Use)', 'Benefits address (Req for HMO Plans)', and 'Mailing address (For Official City mail)'. Each entry shows the same address: '1234 Main Street, San Diego, 5555551234'. A red box highlights the edit icon (a blue pencil) next to the 'Permanent residence' entry. On the right, the 'Family Members / Dependents' section shows 'Spouse' (Smith John) and 'Mother' (Doe Jane), both with edit icons. Below that, the 'Bank Information' section shows 'Main bank' (Jane Smith, SAN DIEGO METROPOLITAN CREDIT UNION) with an edit icon. At the bottom, the 'Communication' and 'Benefits Medical Information' sections both show 'No data available'.

Section	Item	Details	Action
Addresses	Permanent residence (For Income Tax Use)	Street Name: 1234 Main Street City: San Diego Telephone Number: 5555551234 Valid From: Today	Edit
	Benefits address (Req for HMO Plans)	Street Name: 1234 Main Street City: San Diego Telephone Number: 5555551234 Valid From: Today	Edit
	Mailing address (For Official City mail)	Street Name: 1234 Main Street City: San Diego Telephone Number: 5555551234 Valid From: Today	Edit
Family Members / Dependents	Spouse	Name: Smith John Date of Birth: 02/21/1966 Valid From: 06/23/2010	Edit
	Mother	Name: Doe Jane Date of Birth: 06/12/1941 Valid From: 06/23/2010	Edit, Delete
Bank Information	Main bank	Payee: Jane Smith Bank name: SAN DIEGO METROPOLITAN CREDIT UNION Bank Account: 0000000055555555	Edit
Communication	No data available		
Benefits Medical Information	No data available		

2. Edit the applicable information in the edit screen.

The screenshot shows a web form titled "Edit Permanent residence (For Income Tax Use)". At the top, there are three buttons: "Save and Back" (with a green checkmark icon), "Save" (with a floppy disk icon), and "Cancel" (with a red X icon). Below the buttons, the form contains several fields:

- \* Country: USA
- Address**
  - C/O: [empty field]
  - \* House Number And Street: 1234 Third Street (a red arrow points to this field)
  - Second Address Line: [empty field]
  - \* City: San Diego
  - County: [empty field]
  - \* State: California (dropdown menu)
  - \* ZIP Code: 92120
  - Telephone: 555 [empty field] 555-1234 [empty field]
- Validity**
  - ☒ Valid as of Today
  - ☐ Valid From [empty field]

Once information entry is complete, hit either the "Save" button or "Save and Back" button to save entries. Green check mark will appear in top left of screen if saved successfully.  Data saved successfully

- Newly edited information will now populate on the Personal Profile screen.

### Personal Profile

✓ Data saved successfully

Addresses

**Permanent residence (For Income Tax Use)**

Street Name: 1234 Third Street

City: San Diego

Telephone Number: 5555551234

Valid From: Today

**Benefits address (Req for HMO Plans)**

Street Name: 1234 Main Street

City: San Diego

Telephone Number: 5555551234

Valid From: Today

**Mailing address (For Official City mail)**

Street Name: 1234 Main Street

City: San Diego

Telephone Number: 5555551234

Valid From: Today

Communication

No data available

Personal Data

No data available

Family Members / Dependents

**Spouse**

Name: Smith James

Date of Birth: 02/21/1966

Valid From: 06/23/2010

**Mother**

Name: Doe Jane

Date of Birth: 06/12/1941

Valid From: 06/23/2010

Bank Information

**Main bank**

Payee: Jane Smith

Bank name: SAN DIEGO METROPOLITAN CREDIT UNION

Bank Account: 0000000055555555

Benefits Medical Information

No data available