Purpose:

Outline the process for making changes in the employee records when employees have personal information changes (address, name change, dependents, etc.).

Procedure:

1) Address change
   A) Employee or HR change address in HRIS system (Bamboo)
   B) Employee or HR change address in Benefits enrollment system (Employee Navigator). This will change the address for all insurance carriers.
   C) Employee must notify their Heath Savings Account Carrier directly of their address change.
   D) HR will notify Accounting/ Payroll of address change.
      i) Payroll will notify 401(k) vendor of address change.

2) Name Change
   A) HR will confirm legality of name change (SS Card, etc.)
   B) Notify IT consultant to change email address.
   C) Request office administrator to create new nameplate for office and/or business cards.
   D) HR change name in HRIS system (Bamboo)
      i) Create new Employee ID with new name (if last name changed)

   E) HR changed name in Benefits enrollment system (Employee Navigator). This will change the name for all insurance carriers.
   F) Employee must notify their Heath Savings Account Carrier directly of their name change.
   G) HR will notify Accounting/ Payroll of name change.
      i) Accounting will notify 401(k) vendor of name change.
      ii) Notify accounting/Payroll of new employee ID if applicable.
   H) Confirm if name needs to be changed on any current company publications, social media, or web pages/materials.

3) Dependents or Beneficiaries changes/additions
   A) Employees add/change dependent or beneficiary in Benefits enrollment system (employee Navigator) Note change in Benefits Life Event SOP for steps to insure new dependent. This will change the information on beneficiaries for applicable insurance carriers.
   B) Employees will add/charge beneficiaries with 401(k) vendors on their website.
   C) Make changes to Emergency Contact if applicable based on these changes.