

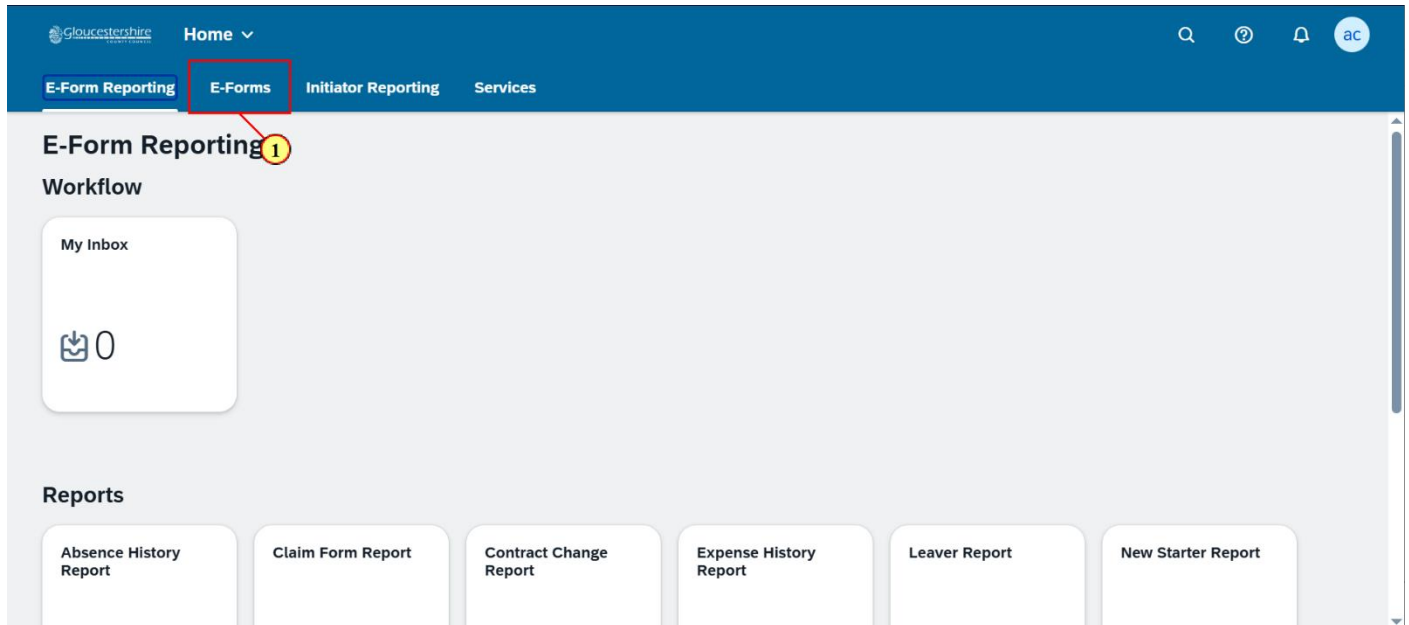


Schools OBO - Personal Details Form

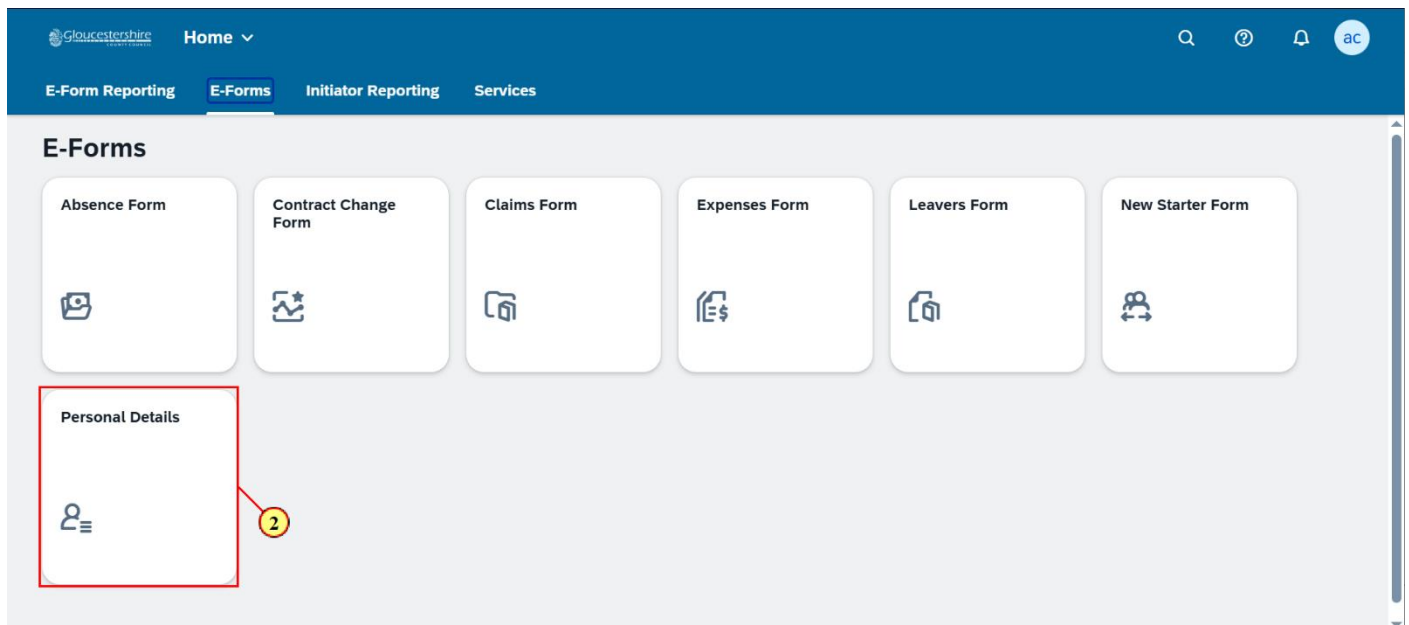
Schools OBO - Personal Details Form

In this step by step guide, you will learn how to:

- Complete the Personal Details E-Form



(1) Click on the **E-Form**stab.



(2) Click on the **Personal Details** tile to access the Personal Details E-Form.

Personal Details

Form History

Introduction

This is the form used to make changes to records for staff employed in your organisation. Upon submission of the Personal Details form, the form will upload directly into SAP. Help and guidance on completing this form can be found on our [e-Forms pages](#).

Header

Initiator: Mrs Marian Khan
 Form ID: 0000015058
 Form Creation Date: 27 Mar 2025
 Organisation name: Clearwater C/E Primary Academy (F041)

Print Cancel Delete Save as Draft **Submit**

Your details will display in the **Header** section as the initiator of the E-Form.

(3) Click on ▼ to scroll down.

Personal Details

Header

Form Creation Date: 27 Mar 2025
 Organisation name: Clearwater C/E Primary Academy (F041)

Section A - Change Details

Effective date of Change: * e.g. 31 Dec 2025 **4**
 Please select employee: *

Confirm Employee Details

Your Comments - Internal Organisation Only

Print Cancel Delete Save as Draft **Submit**

The **effective date of the change** and the **name of the Employee** are entered in **Section A**.
 Note the date can be backdated.

(4) Click on the **Calendar** button to select the effective date of the change.

The screenshot shows the 'Personal Details' form with a calendar pop-up for March 2025. The calendar is open, and a red box highlights the 'Section A - Change Details' section. A yellow circle with the number '5' points to the calendar. The form includes fields for 'Form Creation Date' (27 Mar 2025), 'Organisation name' (Clearwater C/E Primary Academy (F041)), and 'Effective date of Change' (e.g. 31 Dec 2025). A 'Please select employee' dropdown is also visible. At the bottom, there are buttons for 'Print', 'Cancel', 'Delete', 'Save as Draft', and 'Submit'.

(5) Select the **effective date** of the change.

The screenshot shows the 'Personal Details' form with the 'Effective date of Change' field set to '10 Mar 2025'. A red box highlights the 'Please select employee' dropdown, and a yellow circle with the number '6' points to it. The form includes fields for 'Form Creation Date' (27 Mar 2025) and 'Organisation name' (Clearwater C/E Primary Academy (F041)). At the bottom, there are buttons for 'Print', 'Cancel', 'Delete', 'Save as Draft', and 'Submit'.

(6) Click on **▼** to select the Employee you are making a Personal Details change on behalf of.

The screenshot shows the 'Personal Details' form with a dropdown menu open for 'Please select employee: *'. The dropdown lists several employees: Coxa Dylisa 00153346 Assistant Head, Coxa Dylisa 00167582 Class Teacher, Davies Branwen 00163934 SENCO, Davis Sara 00129920 Teaching Assistant (GRD D) (highlighted with a red box), Edwards Lynne 00135493 Teacher (marked with a yellow circle containing the number 7), Edwardsa Elaina 00196697 Teaching Assistant, and Evans Carys 00186591 Teaching Assistant. A 'Confirm Employee Details' button is visible at the bottom right of the form.

(7) In this example, we will select **Davis Sara**.

The screenshot shows the 'Personal Details' form with 'Davis Sara 00129920 Teaching Assistant (GRD D)' selected in the 'Please select employee: *' dropdown. The 'Effective date of Change: *' is set to '10 Mar 2025'. The 'Organisation name:' is 'Clearwater C/E Primary Academy (F041)'. The 'Confirm Employee Details' button is highlighted with a red box and a yellow circle containing the number 8. The 'Print', 'Cancel', 'Delete', 'Save as Draft', and 'Submit' buttons are visible at the bottom.


Before you can proceed, you need to confirm the employee's details.

(8) Click on **Confirm Employee Details** to confirm the employee.

The screenshot shows the 'Personal Details' form for Gloucestershire County Council. The header includes the form creation date (27 Mar 2025) and the organisation name (Clearwater C/E Primary Academy (F041)). Under 'Section A - Change Details', the effective date is 10 Mar 2025 and the employee is Davis Sara. A confirmation dialog box is open, asking 'You will not be able to change the selection. Are you sure you'd like to go ahead?'. The 'OK' button is highlighted with a red box and a yellow circle containing the number 9. Other buttons include 'Cancel', 'Print', 'Delete', 'Save as Draft', and 'Submit'.

(9) Click on **OK** to continue.

This screenshot shows the 'Personal Details' form after the confirmation step. The 'Effective date of Change' is 10 Mar 2025 and the employee is 'Davis Sara 00129920 Teaching Assistant (GRD D)'. A 'Confirmed' button is visible. A pink box highlights the section 'Indicate the changes you would like to make', which contains three checkboxes: 'Change Of Address', 'Change Of Bank Details', and 'Change Of Name'. The 'Change Of Address' checkbox is selected and highlighted with a red box and a yellow circle containing the number 10. The 'Print', 'Cancel', 'Delete', 'Save as Draft', and 'Submit' buttons are also visible.

	<p>There are 3 types of changes you can make to an Employee Personal Details:</p> <ol style="list-style-type: none">1. Change of Address2. Change of Bank Details3. Change of Name
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(10) Select the **Change Of Address** checkbox if you want to make a change of address.


The screenshot shows the 'Personal Details' form for Gloucestershire County Council. The header section contains 'Form Creation Date' (27 Mar 2025) and 'Organisation name' (Clearwater C/E Primary Academy (F041)). Section A, 'Change Details', includes 'Effective date of Change' (10 Mar 2025) and 'Please select employee' (Davis Sara 00129920 Teaching Assistant (GRD D)). At the bottom, there are three checkboxes: 'Change Of Address' (checked), 'Change Of Bank Details' (highlighted with a red box and a yellow circle with '11'), and 'Change Of Name' (unchecked). A 'Confirmed' button is on the right. At the bottom of the form are buttons for 'Print', 'Cancel', 'Delete', 'Save as Draft', and 'Submit'.

(11) Select the **Change Of Bank Details** checkbox if you want to change the Employee's Bank Details,

This screenshot is identical to the one above, but the 'Change Of Name' checkbox is highlighted with a red box and a yellow circle containing the number '12'. The 'Change Of Bank Details' checkbox is now unchecked.

(12) Select the **Change Of Name** checkbox if you want to change the Employee's name.

(13) Click on ▼ to scroll down.



If you selected **Change of Address** in **Section A**, a new Section (in this case **Section B**) will display.

There are 3 possible changes you can make in the **Change of Address Details** section:

1. Change to **Employee's Permanent Address**
2. Change to **Employee's First Emergency Address**
3. Change to **Employee's Second Emergency Address**

(14) Select the **Permanent Address** checkbox to change the Employee's permanent address.

Gloucestershire Personal Details

Section A - Change Details

Change Of Address Change Of Bank Details Change Of Name

Section B - Change of Address Details

Indicate the address type you would like to make change

Permanent Address First Emergency Address Second Emergency Address

Address Type Permanent Address

Current Details

Street & House No 20096 Carlton Terrace

2nd Address Line Pine Street

New Details

Street & House No*

2nd Address Line

Print Cancel Delete Save as Draft Submit

(15) Select the **First Emergency Address** checkbox to change the Employee's first emergency address.

Gloucestershire Personal Details

Section A - Change Details

Change Of Address Change Of Bank Details Change Of Name

Section B - Change of Address Details

Indicate the address type you would like to make change

Permanent Address First Emergency Address Second Emergency Address

Address Type Permanent Address

Current Details

Street & House No 20096 Carlton Terrace


2nd Address Line Pine Street

New Details

Street & House No*

2nd Address Line

Print Cancel Delete Save as Draft Submit

 You may also select the **Second Emergency Address** checkbox to change the Employee's second emergency address.

In this example, we will make a change to the Employee's permanent address and first emergency address.

(16) Click on ▼ to scroll down.

Indicate the address type you would like to make change

Permanent Address First Emergency Address Second Emergency Address

Address Type	Permanent Address		New Details
	Current Details		New Details
Street & House No	20096 Carlton Terrace		Street & House No* 131 Wood Lane
2nd Address Line	Pine Street		2nd Address Line
City	North/Cardiff		City* North/Cardiff
County	Gloucestershire		County Gloucestershire
Post Code	GL12 9NF		Post Code* GL13 8HG

Print Cancel Delete Save as Draft 17 it

Depending on which change option(s) you selected, the E-Form will display the relevant sections.

The **Current Details** are displayed on the left hand side.
 The **New Details** are displayed on the right hand side. These fields are editable so you can enter the new values.


Note in this example, the new details have already been populated to show an example of permanent address change.

(17) Click on ▼ to scroll down.

Address Type	First Emergency Address		New Details
2nd Address Line	Pine Street		2nd Address Line
City	North/Cardiff		City* North/Cardiff
County	Gloucestershire		County Gloucestershire
Post Code	GL12 9NF		Post Code* GL13 8HG
Home Telephone Number	01487939125		Home Telephone Number 01487939125
Mobile Telephone Number			Mobile Telephone Number* 07764578855
Email Address	00129920@testgloucestershire....		Email Address* 00129920@testgloucestershire....
			Confirm Email Address* 00129920@testgloucestershire....

Print Cancel Delete Save as Draft 18 it

Mandatory fields are marked with an asterisk (*).



Note if any data entries are on the wrong format, i.e phone number, the system will return an error message.

- ✘ Please re-enter the telephone number in a valid format and contact your Pay and Conditions Administrator if you have any further difficulties
- ✘ Please note that the email address should be in a correct format
- ✘ Please note that the email addresses must match. Re-enter the email addresses
- ✘ Please enter the postcode in a valid format. This should include a space in the middle


(18) Click on ▼ to scroll down.

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▼ Section B - Change of Address Details

	First Emergency Address
Address Type	Current Details
Street & House No	<input type="text" value="33 Lower Bridge Street"/>
2nd Address Line	<input type="text"/>
City	<input type="text" value="North/Cardiff"/>
County	<input type="text" value="Gloucestershire"/>
Post Code	<input type="text" value="GL14 7LF"/>
First Name	<input type="text" value="Gareth"/>
Last Name	<input type="text" value="Davis"/>

Print
Cancel
Delete
Save as Draft
19



This next screen shows you an example of a **First Emergency Address** change with the current and new details.


Note the new details have already been populated to show an example of a first emergency address change.

(19) Click on ▼ to scroll down.

Section B - Change of Address Details

2nd Address Line		2nd Address Line	
City		City*	North/Cardiff
County		County	Gloucestershire
Post Code		Post Code*	GL14 7LF
First Name		First Name*	Gareth
Last Name		Last Name*	Davis
Relationship		Relationship*	Parent
Contact Telephone Number		Contact Telephone Number*	01487084577

Buttons: Print, Cancel, Delete, Save as Draft, **20** Submit


 Mandatory fields are marked with an asterisk (*).

(20) Click on ▼ to scroll down.

Section C - Change of Bank Details


Current Details		New Details	
Sort Code	110877	Effective Month*	March 2025
Bank/Building Society	Halifax	Sort Code*	110877
Account Number	87808459	Bank/Building Society	Halifax
Building Society Ref No		Account Number*	98346678
		Building Society Ref No	

Buttons: Print, Cancel, Delete, Save as Draft, **21** Submit

 As we selected the **Change of Bank Details** option above, a new section (**Section C**) is displayed. Similarly to the change of address section, the **Current Details** are displayed on the left hand side and new editable fields (**New Details**) are displayed on the right hand side, where you can enter the new values. Note the new details have already been populated to show an example of a change of bank details.


(21) Click on ▼ to scroll down.

The screenshot shows the 'Personal Details' form with 'Section D - Change of Name' expanded. It features two columns: 'Current Details' and 'New Details'. The 'Current Details' column shows fields for Title (Mrs), Surname (Davis), Middle Name, Name (Sara), and Known As (Sara Davis). The 'New Details' column shows fields for Title* (Mrs), Surname* (Davis-Smith), Middle Name (Ann), Name* (Sara), and Known As (Sara Davis-Smith). At the bottom right, there are buttons for 'Print', 'Cancel', 'Delete', 'Save as Draft', and 'Submit' (with a '22' icon).

 As we selected the **Change of Name** option above, a new section (**Section D**) is displayed. Similarly to the change of address section, the **Current Details** are displayed on the left hand side and new editable fields (**New Details**) are displayed on the right hand side, where you can enter the new values. Note the new details have already been populated to show an example of a change of name.

(22) Click on ▼ to scroll down.

The screenshot shows the 'Personal Details' form with 'Section D - Change of Name' collapsed. Below it is the 'Your Comments - Internal Organisation Only' section, which contains a text area with the comment 'Effective 10th of March 2025.' and an 'Add Comment' button. At the bottom right, there are buttons for 'Print', 'Cancel', 'Delete', 'Save as Draft', and 'Submit'. A '23' icon is present near the 'Add Comment' button.

 You can add comments for the entire E-Form. Note these comments are for internal-use only, as shown below.

(23) Click on **Add Comment** to save your comment.

The screenshot shows the 'Personal Details' form for 'Section D - Change of Name'. Under the 'Your Comments - Internal Organisation Only' section, there is a text area for 'Your Comments' and an 'Add Comment' button. At the bottom right, there is a row of buttons: 'Print', 'Cancel', 'Delete', 'Save as', and 'Submit'. The 'Submit' button is highlighted with a red box and a yellow circle containing the number 24.

(24) Click on **Submit** to submit the E-Form.

Alternatively, you can cancel, delete or save the e-Form as a draft.

The screenshot shows the same form as above, but with a 'Warning Message' dialog box overlaid. The dialog box contains the text 'Do you want to submit?' and two buttons: 'Yes' and 'Cancel'. The 'Yes' button is highlighted with a red box and a yellow circle containing the number 25. At the bottom right, the buttons are 'Print', 'Cancel', 'Delete', 'Save as Draft', and 'Submit'.

(25) Click on **Yes**.

The screenshot shows the Gloucestershire Personal Details form. At the top, there is a navigation bar with the Gloucestershire logo, the title 'Personal Details', and search, help, and user icons. Below this is a section titled 'Section D - Change of Name'. Underneath, there is a section for 'Your Comments - Internal Organisation Only'. A message box indicates that the form '0000015140' has been submitted successfully. Below the message box is an 'Add Comment' button. At the bottom of the form, there are buttons for 'Print', 'Cancel', 'Delete', 'Save as Draft', and 'Submit'. A red box highlights the 'OK' button in the success message, with a yellow circle containing the number '26' next to it.

(26) Click on **OK**.

The screenshot shows the Gloucestershire E-Forms dashboard. At the top, there is a navigation bar with the Gloucestershire logo, the title 'Home', and search, help, and user icons. Below this is a menu with 'E-Form Reporting', 'E-Forms', 'Initiator Reporting', and 'Services'. The main content area is titled 'E-Forms' and contains several cards for different forms: 'Absence Form', 'Contract Change Form', 'Claims Form', 'Expenses Form', 'Leavers Form', 'New Starter Form', and 'Personal Details'. Each card has an icon representing the form type.

The screenshot shows an information message box. On the left, there is a blue speech bubble icon with a white 'i'. To the right of the icon, the text reads: 'You have successfully completed a **Personal Details E-Form**. Note Personal Details E-Forms do not require approval.'