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PeopleSoft HCM 9.2: eProfile

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PeopleSoft HCM 9.2: eProfile

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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

Locally Installed Help

If you're setting up an on-premise PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. See Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	***Description***
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help
- Managing Hosted online help
- Managing locally installed PeopleSoft Online Help

Common Elements Used in this PeopleBook

administrator	Refers to PeopleSoft power users. Power users generally have access to the core PeopleSoft Human Resources (HR) Management System. Depending on the organization, any of the following system delivered roles are recognized as a power user: Benefits Administrator, Federal Self-Service Administrator, HR Administrator, HR Processor, Payroll Administrator, and Personnelist.
originator	The person who makes the initial request. For self-service transactions, this is usually an employee or manager.
reviewer	The person who either approves or denies a submitted request.

PeopleSoft HCM Application Fundamentals

The *PeopleSoft eProfile* provides you with implementation and processing information for your PeopleSoft eProfile system. Additionally, essential information describing the setup and design of your system appears in a companion volume of documentation called Application Fundamentals. Each PeopleSoft product line has its own version of this documentation.

Related Links for PeopleSoft HCM

Oracle Help Center

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

PeopleSoft Spotlight Series

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com. Please include the applications update image or PeopleTools release that you're using.

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PeopleSoft Blogs

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Chapter 1

Getting Started with eProfile

PeopleSoft eProfile Overview

eProfile is a collaborative application that enables employees to maintain their own profiles, thereby decreasing administrative time, costs and increasing data integrity. eProfile ensures that data changes comply with your organization's requirements.

With this application, employees can view, update, and request changes to their personal data, such as:

- Email address.
- Emergency contacts.
- Ethnicity.
- Home and mailing addresses.
- Instant message IDs.
- Marital status.
- Name change.
- Personal information.
- Phone numbers.
- Completing and submitting I-9 information.

For U.S. federal customers, additional transactions include:

- Checking the status of requests they have submitted.
- Requesting a leave of absence.
- Requesting a termination.

PeopleSoft eProfile Business Processes

PeopleSoft eProfile supports these business processes:

- Maintaining name, address, phone number, marital status, date of birth, and other data.
- Requesting leaves of absence or terminations (U.S. federal employees).
- Determining how workflow notifications are received.

PeopleSoft eProfile Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all sources of information about the PeopleSoft system, including installation guides, table-loading sequences, data models, and business process maps.

Refer to the *PeopleSoft HCM 9.2 - Reorganization of Component Interface Permissions* (Doc ID 2342162.1) MOS posting for a list of system-delivered CIs and their usage, the mapping of CIs and associated permission lists, and the mapping of CI permission lists and user roles.

See product documentation for *PeopleTools: Setup Manager*.

Related Links

Application Fundamentals

Chapter 2

(USF) Setting Up Approvals

Understanding Transactions and Approvals

This overview discusses:

- Approvals and the Approval Framework.
- Employee self-service transactions with approvals.
- Work in progress statuses for approval steps.
- PAR defaults for approved transactions.
- Delivered approval flows.

Approvals and the Approval Framework

The system uses the generic Approval Framework to manage approvals for federal self-service transactions. The Approval Framework is a tool for creating, running, and managing approval processes. Approval workflow is triggered when a requester submits a transaction, such as a promotion. The application hands the transaction over to the Approval Framework, which finds the appropriate approval process definition and launches the approval workflow. The approval process definition controls who must approve the transaction and in what order. Administrators have the ability to monitor the status of Approval Framework approval transactions and to perform various actions on submitted transactions.

See "Understanding Approvals" (PeopleSoft HCM 9.2: Application Fundamentals).

Employee Self-Service Transactions With Approvals

PeopleSoft eProfile includes three federal self-service transactions that include Approval Framework approval processing:

- Name change.
- Address change.
- Marital status change.

Note: The Change Phone Number transaction does not use the approval process. When the request is submitted, it automatically updates the PeopleSoft HR tables.
The Request Leave of Absence and Request Termination transactions use the USFED approval transaction definitions that write directly to the PAR tables. The USFED transaction uses PeopleSoft Workflow (and not the Approval Framework) to manage approvals

---

See "Understanding WIP Management System Setup" (PeopleSoft HCM 9.2: Application Fundamentals).

Work In Progress Statuses for Approval Steps

The federal work-in-progress (WIP) management system works in tandem with approval processing to automate the tracking and processing of personnel action requests as they move through the steps of the approval process. Each transaction is configured to use specific WIP statuses at each stage of the approval process.

Because the Approval Framework is a generic workflow approval engine, additional setup outside of the Approval Framework is necessary so that you can associated federal work in progress statuses with approval steps.

Note: When associating WIP statuses with approval steps, you manually set up the steps that represent your approval processing steps. If you modify the delivered approval process, take care to keep these step definitions in sync with the Approval Framework process definitions.

See Defining WIP Statuses for Approval Steps.

PAR Defaults for Approved Transactions

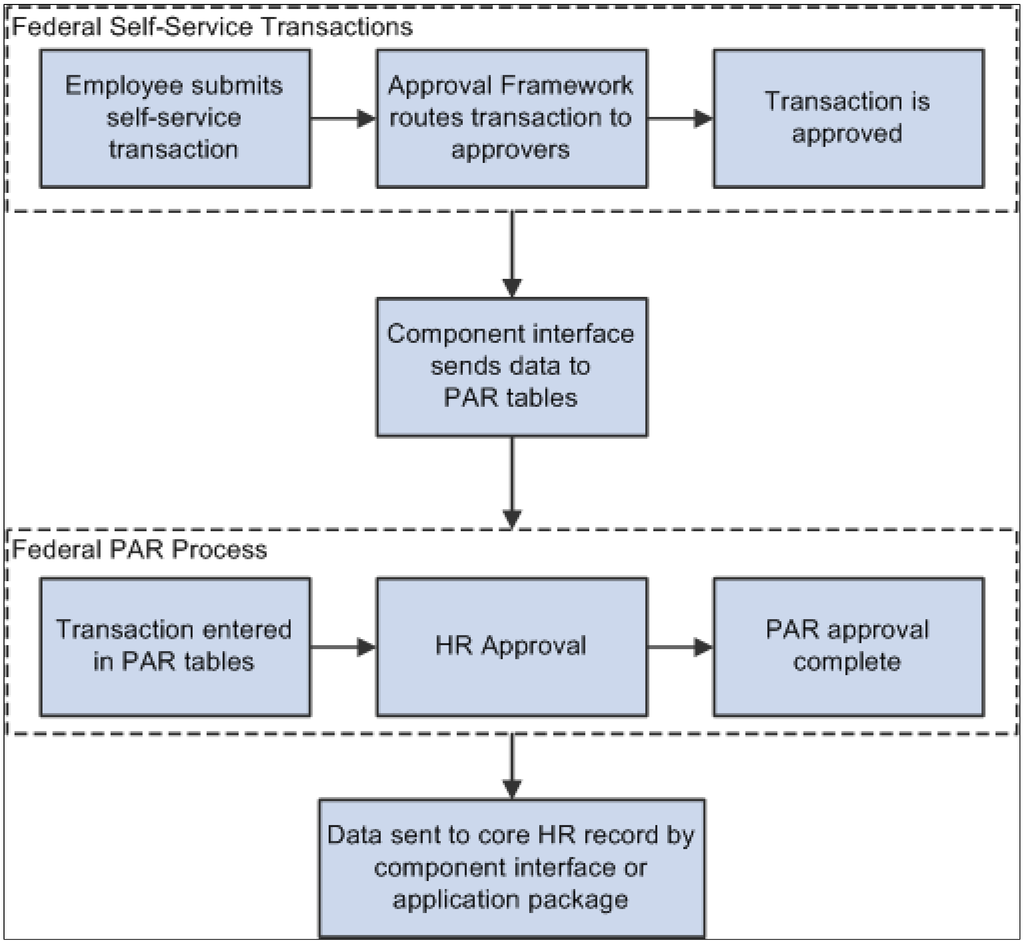
In PeopleSoft HR, the Personnel Action Request (PAR) system automatically routes a wide variety of requests to reviewing officials in human resources. PAR processing is separate from the Approval Framework approval process and occurs only after all Approval Framework approvals are complete, at which point a component interface automatically pushes the transaction data to the PAR tables.

To support the push to the PAR system, you must provide default values for certain fields that are required in the PAR tables and that are not normally entered by the employee who originates the self-service request.

See Defining PAR Tracking Data.

Image: Process flow for employee self-service transactions

This process flow diagram illustrates how employee self-service transactions first go through Approval Framework approvals, then get sent to federal PAR processing before any data changes are made to core HR tables:



Delivered Approval Flows

The Approval Framework controls the approval processes for both manager and employee transactions. PeopleSoft delivers fully configured approval processes (including WIP statuses) for all of the U.S. federal self-service transactions. As long as you use the delivered approval processes, no additional configuration is necessary, but you can use the common Approval Framework pages to review (or modify) the delivered configuration.

Approval Framework Process Definitions

These are the Approval Framework process definitions for the PeopleSoft eProfile federal transactions:

Transaction	***Approval Framework Process ID***
Name change	FederalNameChg
Address change	FederalAddrChg

Transaction	***Approval Framework Process ID***
Marital status change	FederalMarChg

Approval Framework process definitions include steps for each approver. (The initial request does not get defined as a step.) All three of the delivered process definitions provide a two-step approval process, and each approver has the option to approve or deny the transaction. If either approver denies the transaction, the system closes the request and notifies the originator of the denial.

If both approvers approve the transaction, the system updates the PAR tables (the Federal Job, Federal Personal Data, and the employee tracking tables), which in turn triggers a workflow notification to the person assigned to the Personnelist role.

Defining WIP Statuses for Approval Steps

To define WIP statuses for approval steps, use the Approval Transactions (GVT_WIP_RECORD) and Approval Flow (GVT_WIP_ACTVTY) components.

These topics provide an overview of WIP statuses and approval steps and discuss how to define WIP statuses.

Pages Used to Define WIP Statuses for Approval Steps

Page Name	***Definition Name***	***Usage***
Transaction Setup Page	GVT_WIP_RECORD1	Define statuses and status types.
Define Steps Page	GVT_WIP_ACTVTY4	Associate WIP statuses with steps in the approval process for federal self-service transactions. You cannot associate WIP statuses with approval steps for federal self-service transactions until your approval process has been defined. Use the Approval Framework to define the approval process.

Understanding WIP Statuses and Approval Steps

You define the approval steps for your self-service transactions using the Approval Framework. However, additional setup is necessary so that you can associate federal WIP statuses with approval steps.

To define the WIP statuses for approval steps, you must first set up the WIP statuses. Each self-service transaction has its own set of WIP statuses. Oracle delivers a complete set of statuses, but you can review and modify them as necessary.

After defining WIP statuses for each transaction, you need to associate the statuses with the possible actions that can be taken during specific approval steps. When you do this, you to create a row of data for each approval step in the Approval Framework process definition *and* create one additional row to represent the initial request, which does not exist as a step in the Approval Framework process definition. Then, for each approval step, you create a matrix that associates possible actions (such as request, approve, or deny) with the available WIP statuses.

Note: When associating WIP statuses with approval steps, you manually set up the steps that represent your approval processing steps. If you modify the delivered approval process, take care to keep these step definitions in sync with the Approval Framework process definitions.

Transaction Setup Page

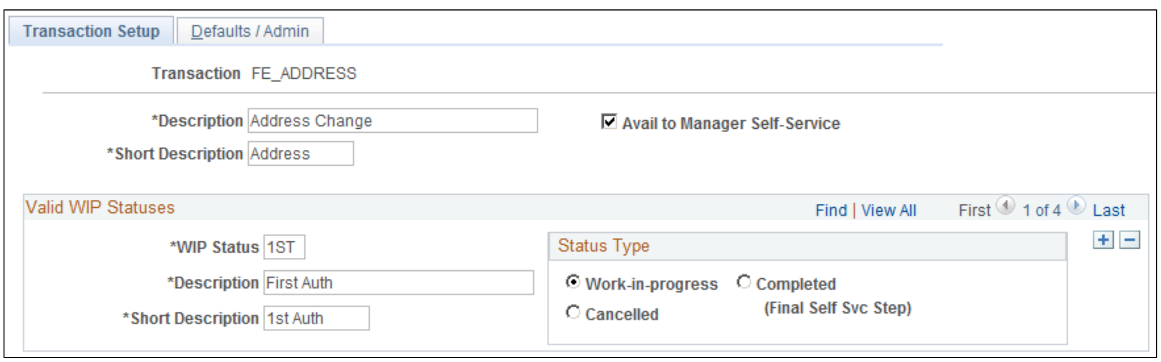
Use the Transaction Setup page (GVT_WIP_RECORD1) to define statuses and status types.

Navigation

Set Up HCM > Product Related > Workforce Administration > Workforce Data USF > Approval Transactions > Transaction Setup

Image: Transaction Setup page

This example illustrates the fields and controls on the Transaction Setup page. You can find definitions for the fields and controls later on this page.



Transaction

Displays the self-service transaction whose WIP statuses you are defining.

Avail to Manager Self-Service (available to manager self-service)

Select this option when setting up approvals for self-service transactions. It is recommended that you not change this field for the delivered self-service transactions.

Valid WIP Statuses

WIP Status (work-in-progress status)

Enter a three-character code to represent the status. Each code represents a WIP status that is available for use as the transaction goes through the approval process. Each WIP status has a status type that indicates whether the status represents work in progress, completed work, or cancelled work.

Note: These codes must be defined as valid statuses for the USFED transaction. This enables the system to process the request using the existing HR Processing USF component when the request has reached final approval in the self-service approval process.

Status Type

Select one of these values for each WIP status:

- *Work-in-progress:* The status is used for a request that is neither complete nor canceled.
- *Cancelled:* The status is used for a request that has been denied.
- *Completed (Final Self Svc Step):* The status is used for a request that has been approved.

Define Steps Page

Use the Define Steps page (GVT_WIP_ACTVTY4) to associate WIP statuses with steps in the approval process for federal self-service transactions.

You cannot associate WIP statuses with approval steps for federal self-service transactions until your approval process has been defined. Use the Approval Framework to define the approval process.

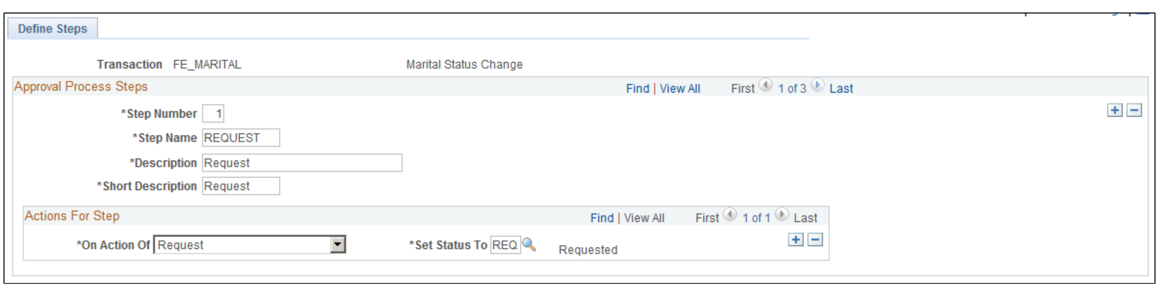
Navigation

Set Up HCM > Product Related > Workforce Administration > Workforce Data USF > Approval Flow > Define Steps

Select a transaction beginning with *FE* as the Transaction value in the search page.

Image: Define Steps page

This example illustrates the fields and controls on the Define Steps page. You can find definitions for the fields and controls later on this page.



Approval Process Steps

Step Number

Enter a number that identifies the order that the approval process will follow. The numbering of the approval steps must be sequential and begin with the number 1. Step 1 must represent the initial request, and subsequent steps must represent the approval steps as defined in the Approval Framework.

Important! For each federal self-service transaction, this page must list every approval step that was defined in the Approval Framework process definition and an additional step for the initial transaction request.

Step Name

Enter a name for this step. The name can be up to 10 characters long.

Actions For Step

On Action Of

Add or modify the action for which you are defining a WIP status. Valid actions are *Approve, Deny,* or *Request.*

For the first step (which always represents the initial request), create one row for the Request action. For subsequent steps, which represent approver actions, create one row for the Approve action and one row for the Deny action. (The other action in the drop-down list box, *Pending,* is not valid for the Approval Framework approval process, so you do not need to define a WIP status for this action for any of the approval steps.)

Set Status To

Select the WIP status to assign to the transaction when the selected action takes place. This field prompts against the transaction-specific WIP statuses that you define on the Transaction Setup page. As delivered, the transactions that you configure using this page (that is, all transactions other than USFED) have these four statuses: *1st* (first authorization), *2nd* (second authorization), *DNY* (denied), and *REQ* (requested).

Defining PAR Tracking Data

To define PAR tracking data, use the Approval Transactions (GVT_WIP_RECORD) component.

These topics provide an overview of default PAR data and describe how to enter the PAR tracking data for federal self-service transactions.

Page Used to Define PAR Tracking Data

Page Name	*Definition Name*	*Usage*
Defaults / Admin Page	GVT_WIP_RECORD3	Define PAR tracking data.

Understanding PAR Tracking Data

Self-service transactions are designed so that employees can easily enter requests to change their own personal data and managers can enter requests to change their direct reports' job data. The government requires that certain information be included with each personnel action request. However, this data would not ordinarily be known by the self-service user.

To ensure that this information is recorded accurately, the system enables you to define the appropriate action/reason codes, Notice of Action (NOA) codes, legal authorities, and PAR remarks for each transaction. This default information is automatically written to the government PAR records when the federal component interface is run at the completion of the final self-service step for the transaction.

Related Links

"Understanding the Administering PAR System" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

Defaults / Admin Page

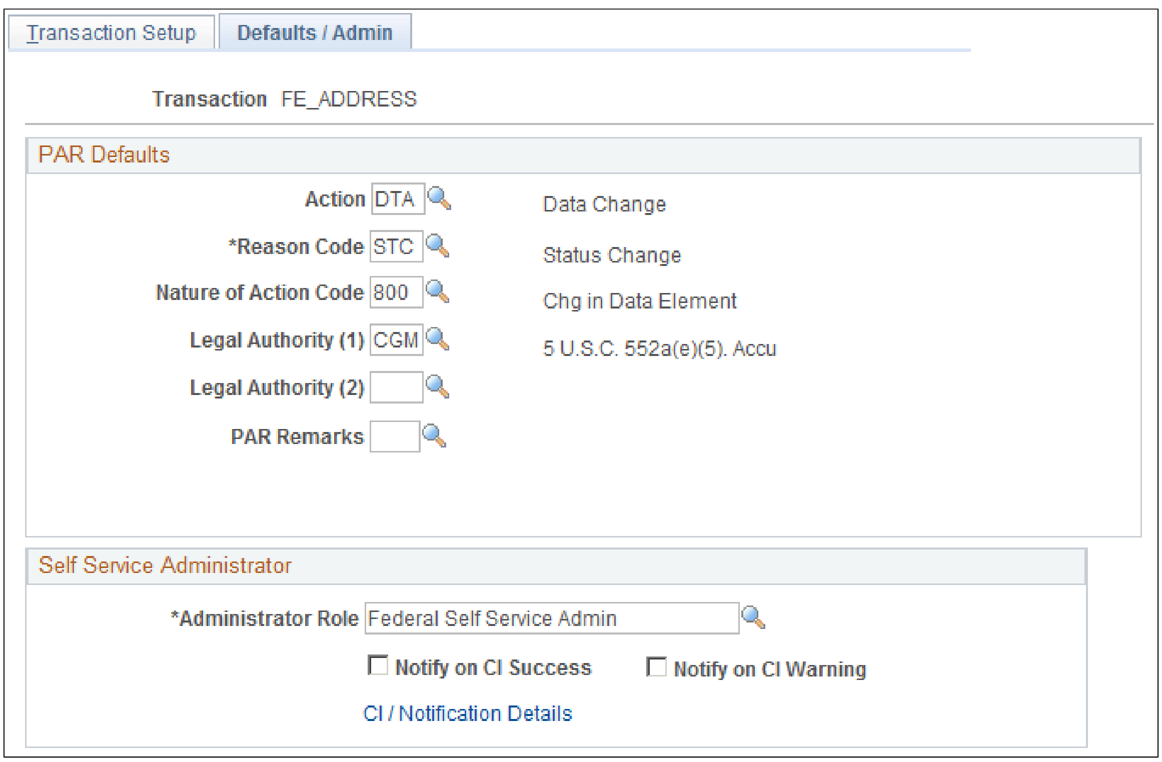
Use the Defaults / Admin page (GVT_WIP_RECORD3) to define PAR tracking data.

Navigation

Set Up HCM > Product Related > Workforce Administration > Workforce Data USF > Approval Transactions > Defaults / Admin

Image: Defaults / Admin page

This example illustrates the fields and controls on the Defaults / Admin page. You can find definitions for the fields and controls later on this page.



PAR Defaults

Action	Select the action that you want written to the government PAR tables for the transaction. These codes are defined on the Action Reasons page.

Reason Code

Select the reason code that you want written to the government PAR tables for the transaction. These codes are defined on the Action Reasons page.

Nature of Action Code

Select the nature of action code that you want written to the government PAR tables for the transaction. These codes are defined on the Nature of Action Table page.

Legal Authority (1)

Select the legal authority (1) that you want written to the government PAR tables for the transaction. These codes are defined on the Legal Authority page.

Legal Authority (2)

Select the legal authority (2) that you want written to the government PAR tables for the transaction. These codes are defined on the Legal Authority page.

PAR Remarks

Select the PAR remarks that you want written to the government PAR tables for the transaction. These codes are defined on the Personnel Action Rqst Rmks page.

Identifying Self-Service Administrators and Defining Notification Details

To identify self-service administrators and define notification details, use the Approval Transactions (GVT_WIP_RECORD) component.

These topics provide an overview of the self-service administrator's role and discuss how to identify the self-service administrator and define notification details.

Pages Used to Identify the Self-Service Administrator and Define Notification Details

Page Name	***Definition Name***	***Usage***
Defaults / Admin Page	GVT_WIP_RECORD3	Identify the self-service administrator and define PAR tracking data.
CI / Notification Details Page (component interface / notification details)	FE_CI_DETAIL	Define notification and self-service administrator details.

Understanding the Self-Service Administrator's Role

Problems may occur when the federal component interface updates the federal PAR tables. The system is designed to recognize:

- Errors
- Warnings

- Successful completions

You use the Defaults / Admin page to define the role of the person that you want to receive the notification when any of these conditions occur.

Related Links

"Configuring Self-Service Transactions" (PeopleSoft HCM 9.2: Application Fundamentals)

Defaults / Admin Page

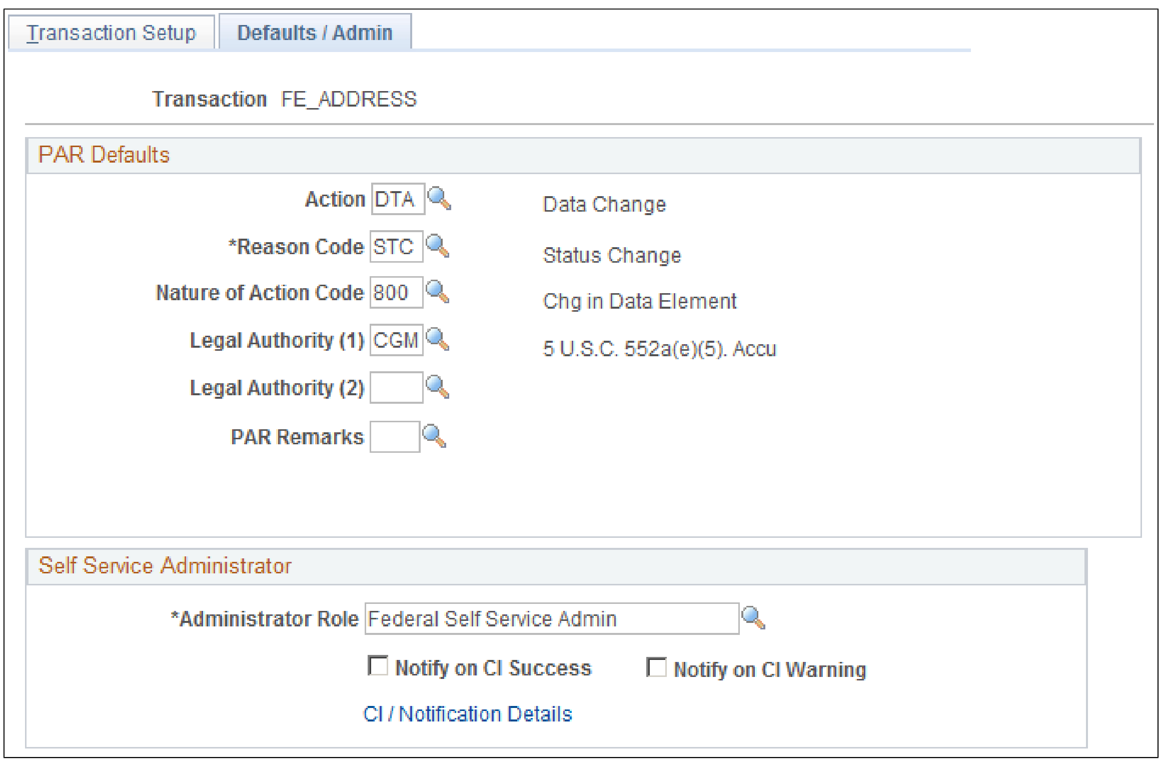
Use the Defaults / Admin page (GVT_WIP_RECORD3) to identify the self-service administrator and define PAR tracking data.

Navigation

Set Up HCM > Product Related > Workforce Administration > Workforce Data USF > Approval Transactions > Defaults / Admin

Image: Defaults / Admin page

This example illustrates the fields and controls on the Defaults / Admin page. You can find definitions for the fields and controls later on this page.



Self-Service Administrator

Administrator Role	Select the role that you want notified when an error, warning, or success occurs.

Notify on CI Success (notify on component interface success)	Select this check box to have the person who is identified in the Administrator Role field notified when the process runs successfully.
Notify on CI Warning (notify on component interface warning)	Select this check box to have the person who is identified in the Administrator Role field notified when a warning occurs during processing.
CI / Notification Details	Click this link to open the CI / Notification Details page.

CI / Notification Details Page

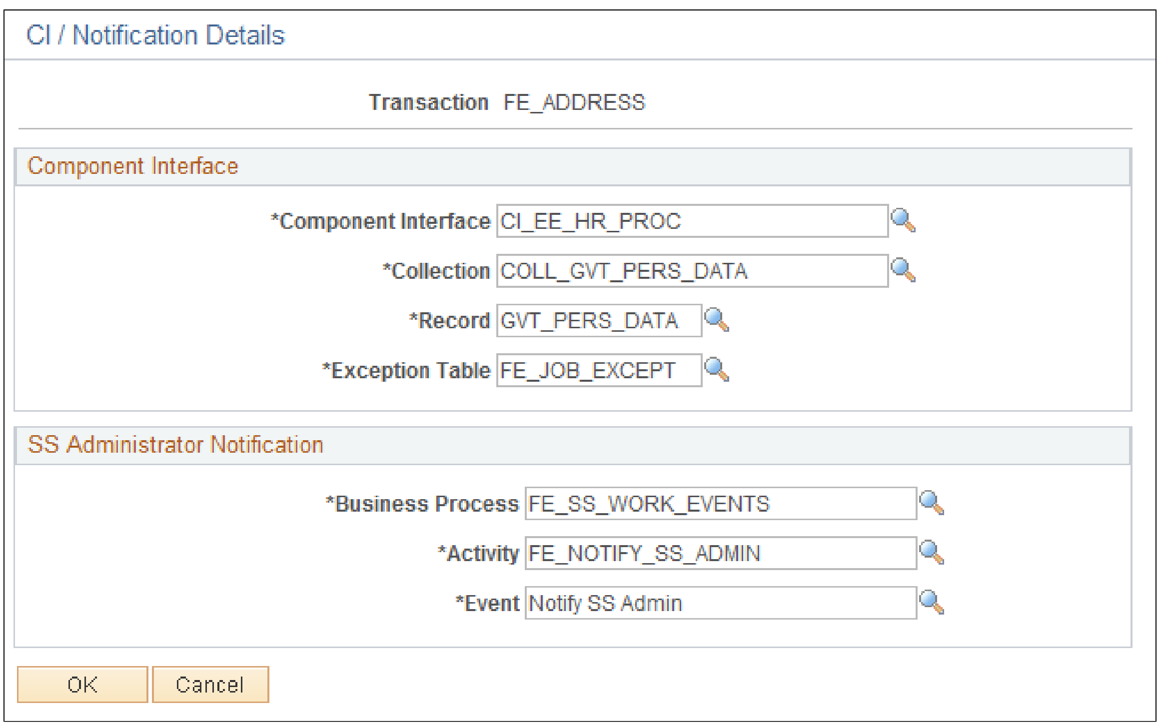
Use the CI / Notification Details (component interface / notification details) page (FE_CI_DETAIL) to define notification and self-service administrator details.

Navigation

Click the CI / Notification Details link on the Defaults / Admin page.

Image: CI / Notification Details page

This example table illustrates the fields and controls on the CI / Notification Details page. You can find definitions for the fields and controls later on this page.



Note: It is recommended that you not change the information on this page for the delivered federal self-service transactions.

Component Interface

Component Interface	Select the name of the component interface process that is used for this transaction.
Collection	Select the name collection that is used by the component interface process for this transaction.
Record	Select the name of the record that is used by the component interface process for this transaction.
Exception Table	Select the name of the exception table that is used by the component interface process to store errors and warnings for this transaction.

SS Administrator Notification

Business Process	Select the name of the business process that is triggered to send component interface notifications to the self-service administrator.
Activity	Select the name of the activity that is triggered to send component interface notifications to the self-service administrator.
Event	Select the name of the event that is triggered to send component interface notifications to the self-service administrator.

Chapter 3

Using eProfile

Prerequisites for Using eProfile

Before you can use the eProfile transactions,

1. Activate eProfile on the Installation Table.

   See "Products Page" (PeopleSoft HCM 9.2: Application Fundamentals).

2. Define position management on the HCM Options page.

   The position management setting determines whether automatic updates, by nonadministrators, are allowed for certain transactions. Automatic updates can occur only if position data is not affected.

   See "HCM Options Page" (PeopleSoft HCM 9.2: Application Fundamentals).

   See "Configuring Self-Service Transactions" (PeopleSoft HCM 9.2: Application Fundamentals).

3. Set up security.

   eProfile uses permission lists, roles, and user profiles to authorize or deny access to transactions and data. The following table lists the permissions and roles delivered with eProfile:

Permission Lists	***Roles***
HCCPSS2000	Manager
HCCPFE2000	Manager Self Service - Fed
HCCPFE1060	Personal Info-Employee - Fed

   Note: Remember to enter an email address for each user profile; otherwise, email routings that are used by workflow will not work.

   See "Understanding PeopleSoft Security" (PeopleSoft HCM 9.2: Application Fundamentals) and "Understanding Data Permission Security for HCM" (PeopleSoft HCM 9.2: Application Fundamentals).

4. Define whether a transaction automatically updates the database.

   Use the Self Service Workflow Configurations page to define whether the transaction will update the database without an administrator's intervention.

   See "Workflow Configurations Page" (PeopleSoft HCM 9.2: Application Fundamentals).

5. Define rules for workflow notifications.

Workflow can be set up to notify the administrator when a transaction successfully updates the database and when the system detects a warning with the update.

See "Admin Notification Setup Page" (PeopleSoft HCM 9.2: Application Fundamentals).

6. Set up the manager's data access to his or her direct reports.

   eProfile uses access types to control a manager's access to employee data. Normally, the manager who initiates a transaction can view only data for his or her direct reports. Access types enable the system to determine who reports to the initiating manager.

   See "Configuring Direct Reports Functionality" (PeopleSoft HCM 9.2: Application Fundamentals).

7. Configure the USFED WIP transaction.

   See "Understanding WIP Management System Setup" (PeopleSoft HCM 9.2: Application Fundamentals).

Reviewing and Updating Personal Information

These topics provide an overview of reviewing and updating personal information and list the pages that are used to review and update personal information.

Pages Used to Review and Update Personal Information

Page Name	***Definition Name***	***Usage***
Personal Information Summary Page	HR_EE_PERS_INFO	Employees view a summary of and are able to change their personal information in the PeopleSoft database. When the Allow Employee to Upload Photo option is enabled on the Installation Table - "HCM Options Page" (PeopleSoft HCM 9.2: Application Fundamentals), the Update Photo link enables you to change photo display options. For more information on uploading your own photo, see Select Photo Page. Available fields for an employee may vary by country.
Address Change Page	HR_HOME_MAILING	Initiate the address change request. You can enter only current or future effective-dated address changes to avoid processing issues with benefits and payroll.
Address Change - Submit Page	FE_ADDRESS_STS	Confirms that the request was submitted.

Page Name	***Definition Name***	***Usage***
Disability - Voluntary Self-Identification of Disability	HR_DISABILITY	Employees use this self-service page to complete and file Form CC-305 disability data electronically. When the employee submits the Voluntary Self-Identification of Disability page, the system tracks and stores the data (employee's name, user ID, date of submission, and response regarding disability) in the Section 503 Disability group box on the Disability page in the Personal Information - Disability component.
Email Addresses Page	HR_EMAIL_ADDRESSES	Employees view, add, change, and delete email addresses in the PeopleSoft database. Employees can view business emails, if available, but cannot add, change, or delete business email addresses; only the system administrator can do this.
Emergency Contacts Page	HR_EMERGENCY_CNTCT	Employees view, add, change, and delete emergency contact information in the PeopleSoft database.
Emergency Contact Detail Page	HR_EMERG_CNTCT_DET	View, add, and change emergency contact address and telephone information.
Ethnic Groups Page	HR_ETHNIC_GROUPS	Employees self-identify their ethnic groups by adding data to the Ethnic Groups grid. Non-U.S. employees always see this version of the Ethnic Groups page, but U.S. employees see this version only if the Two-Question Format (Ethnicity) check box on the Installation Table - Country Specific page is *not* selected.
Ethnic Groups (USA) Page	HR_ETHNIC_GROUPS2	U.S. Employees self-identify their ethnic groups by answering two questions about their race and ethnicity. U.S. employees see this version of the Ethnic Groups page only if the Two-Question Format (Ethnicity) check box on the Installation Table - Country Specific page is selected.
Home and Mailing Address Page	HR_HOME_MAILING	Employees view and change home and mailing addresses in the PeopleSoft database.

Page Name	***Definition Name***	***Usage***
Instant Message IDs Page	HR_IM_CHAT_IDS	Add or update your own instant message IDs through the self-service pages. When you save this page, the system updates the Contact Information page for personal data in HR. Managers can view the instant message IDs through the manager self-service pages for their employees.
Marital Start Page	W3EB_MARR_START	Employees view current marital status and can begin the process to request a change to marital status in the PeopleSoft database.
Marital Status Change Page	HR_EE_MAR_STATUS	Employees view current marital status and submit a request to change marital status in the PeopleSoft database.
Marital Status Change (USF) Page	FE_MARITAL	Submit a marital status change.
Marital Status Change Page	FE_MARITAL_STS	Confirms that the request was submitted.
Name Change Page	HR_EE_NAME	Employees submit a name change request. (USA) All name changes for USA employees must match the name provided on their social security card.
Name Change (USF) Page	FE_EE_NAME	Federal employees submit a name change request.
Name Change (USF) Page	FE_EE_NAME_STS	Confirms that the request was submitted.
Phone Numbers Page	HR_PERSONAL_PHONE	Employees view, add, change, and delete personal phone numbers in the PeopleSoft database.
Phone Number (USF) Page	FE_EE_PHONE_CHG	Submit a phone number change.
Save Confirmation Page	EO_SAVE_CONFIRM	Confirm that the phone number change was saved.
"Employment Eligibility Verification Page, Section 1" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)	HR_I9_EE	Complete the Employment Eligibility Verification form (Form I-9).

To view and update self service personal data using PeopleSoft Fluid User Interface, see Using the PeopleSoft Fluid User Interface to Review and Update Personal Information.

Understanding Reviewing and Updating Personal Information

PeopleSoft delivers the following transactions that enable employees to view, add, change, and delete personal information in the PeopleSoft database.

Commercial	***Federal***
Personal Information Summary	Personal Information Summary
Complete and Submit I-9 Form	Address Change
Disability	Email Addresses
Email Addresses	Emergency Contacts
Emergency Contacts	Ethnic Groups
Ethnic Groups	Marital Status
Home and Mailing Address	Name Change
Instant Message IDs	Phone Number Change
Marital Status	
Name Change	
Phone Numbers	

The following transactions can be configured to automatically update the database and send notifications to the administrator:

- Name change
- Marital status change
- Address change

If workflow is activated, when a user performs one of these transactions, the system automatically routes the transaction request to the appropriate person for approval. Updating your personal information becomes a two-step process:

1. The employee submits the change request.
2. The administrator finalizes the change request.

(USF) When the request has been submitted, employees can review the status of the change requests that they have submitted.

Using the PeopleSoft Fluid User Interface to Review and Update Personal Information

This topic discusses how employees use the PeopleSoft Fluid User Interface to view and update their personal information. The fluid pages discussed in this topic have classic equivalents that are discussed in the topic Reviewing and Updating Personal Information.

This video provides an overview of the PeopleSoft Fluid user interface experience:

PeopleSoft Fluid User Interface Experience in HCM

For general information about Fluid pages in PeopleSoft HCM, see "Understanding PeopleSoft Fluid User Interface Home Pages" (PeopleSoft HCM 9.2: Application Fundamentals)

Pages Use to Review and Update Personal Information Using the PeopleSoft Fluid User Interface

Page Name	***Definition Name***	***Usage***
Personal Details Tile	HC_HR_PDTL_LAUNCH_FL_GBL (this is the cref for the tile)	Access a group of fluid pages that are used to view and maintain your personal information.
Personal Details Dashboard	HC_HR_PERS_DTLS_FL_GBL (cref for the Personal Details dashboard)	View dynamic data for personal data using tiles.
Personal Details Navigation Collection	N/A	View and update personal details within the context of a multi-panel layout. When using a medium to large form factor device, the application displays a left panel navigation, which consists of page category tabs from which you select to view contextual data in the main panel. When using a small form factor, such as a smartphone, the page category items will display by default when you select the Personal Details tile. Select a page list item to access that page.
Select Photo Page	HRCD_USER_PICS_SCF	Upload or select an employee photo to display in self-service and throughout the system.
Addresses (Summary) Page	HR_EE_ADDR_FL	View your home address and mailing address.
Address (Detail) Page	ADDRESS_DFT_SCF	Update address information and view or add attachments that may support the update.

Page Name	***Definition Name***	***Usage***
Contact Details Page	HR_EE_CONTACTS_FL	Review your phone numbers, email addresses, and instant messaging IDs.
Phone Number Page	HR_CNCT_PHONE_SCF	Add, update, or delete a phone number.
Email Address Page	HR_EMAIL_ADDRS_SCF	Add, update, or delete an email address.
Instant Message Page	HR_IM_CHAT_SCF	Add, update, or delete an instant messaging ID.
Social Media (Summary) Page	HR_EE_SOC_MEDIA_FL	Review your social media accounts.
Social Media (Detail) Page	HR_SOC_MEDIA_SCF	Add, update, or delete social media accounts on your personal profile.
Marital Status Page	W3EB_SEL_EVNT_FLU (if eBenefits is active) HR_EE_MARITAL_FL (if eBenefits is not active)	Enter a marital status change.
Name (Summary) Page	HR_EE_NAME_FL	View your current name and any pending name change requests
Name (Detail) Page	NAME_DFT_SCF	Enter name change information and view or add attachments that may support the update.
Ethnic Groups Page	HR_ETHNIC_GRP_FL	View your ethnic group data.
Ethnicity Page	HR_ETHNIC_GRP2_SCF	Enter ethnicity information when the system is configured to collect the information using the two-question format.
Ethnic Group Page	HR_ETHNIC_GRP_SCF	Add, update, or delete an ethnic group from your personal data.
Emergency Contacts (Summary) Page	HR_EMERG_CNTCT_FL	View a list of your emergency contacts.
Emergency Contact (Detail) Page	HR_EMERG_CNTCT_SCF	Add, update, or delete an emergency contact.
Emergency Contact - Address Page	HR_EMERG_ADDR_SCF	Add, update, or delete an address for an emergency contact.
Emergency Contact - Phone Page	HR_EMERG_PHONE_SCF	Add, update, or delete a phone number for an emergency contact.
Additional Information Page	HR_ADDTL_INFO_FL	Review miscellaneous personal information.
Business Partners Page	HR_EE_BUS_PRTNR_FL	View your business partners and their contact information.

Page Name	***Definition Name***	***Usage***
Disability - Voluntary Self-Identification of Disability Page	HR_DISABILITY_FL	Complete and file Form CC-305 disability data electronically.
Veteran Status Page	HR_VET_STATUS_FL	Enter and update self-identification veteran information.
(USA) Form I-9 Page	HR_I9_EE_FL	Access the I-9 instructions PDF, access the Form I-9 page (HR_I9_EE) where you enter personal employee eligibility information, and review the date on which you submitted your Form I-9,
Employment Eligibility Verification Page, Section 1	HR_I9_EE	Complete the employer sections (2 and 3) of the Form I-9. See "Employment Eligibility Verification Page, Section 1" (PeopleSoft HCM 9.2: Human Resources Administer Workforce) (HR_I9_EE) and "Employment Eligibility Verification Page, Section 2 and Section 3" (PeopleSoft HCM 9.2: Human Resources Administer Workforce) (HR_I9_ ADMIN_SEC2) in your *Human Resources Administer Workforce* product documentation.
USCIS Form I-9 - Submit Confirmation Page	EO_SUBMIT_CONFIRM	View a confirmation that you have successfully submitted the Form I-9. See "(USA) Managing I-9 Information" (PeopleSoft HCM 9.2: Human Resources Administer Workforce) in your *Human Resources Administer Workforce* product documentation.

Personal Details Tile

Use the Personal Details tile to access a group of fluid pages that are used to view and maintain your personal information.

Navigation

Select Fluid Home under the main menu. On the page that appears, select *Employee Self Service.* The Personal Details tile is available on the Employee Self Service landing page.

As an employee, you can add the tile, through personalization, to a system-delivered homepage or a homepage that you create.

Image: Personal Details tile

This example illustrates the Personal Details tile.

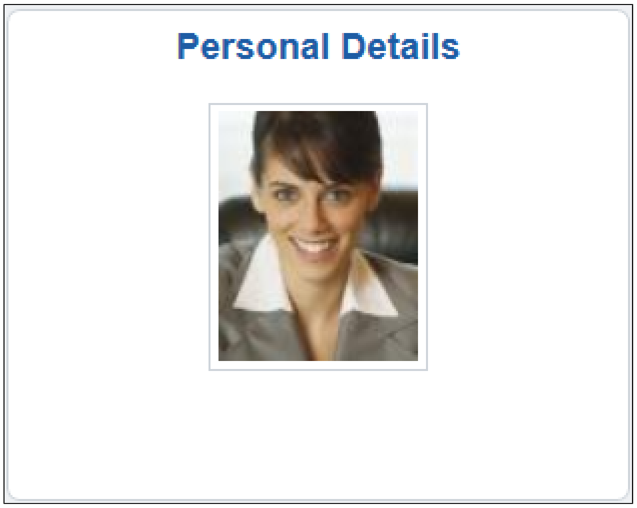
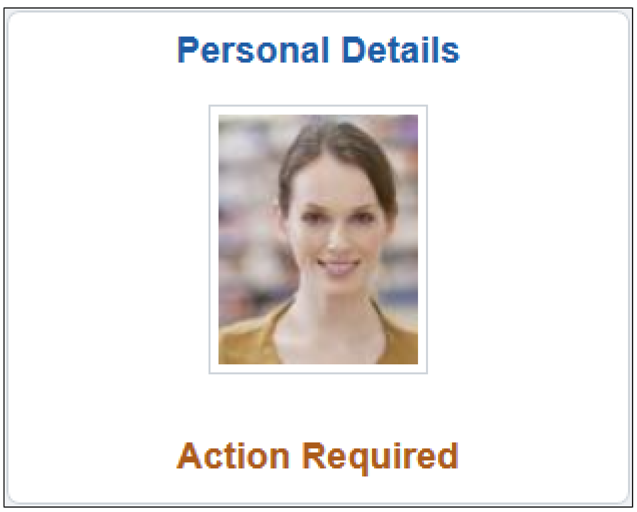


Image: (USA) Personal Details tile displaying the Action Required message

This example illustrates the Personal Details tile displaying the *Action Required* message. This message appears when an employee working in the U.S. needs to submit I-9 form information.



Depending upon the system setup and personal preferences, the picture may display a default photo.

Select the Personal Details tile to access a collection of frequently-used employee transactions easily without using traditional menu navigations. These self-service transaction pages may include:

- Select Photo Page
- Addresses (Summary) Page
- Contact Details Page
- Social Media (Summary) Page
- Marital Status Page
- Name (Summary) Page

- Ethnic Groups Page
- Emergency Contacts (Summary) Page
- Additional Information Page
- Business Partners Page
- Disability - Voluntary Self-Identification of Disability Page
- Veteran Status Page
- (USA) Form I-9 Page

Accessing Personal Details Transaction Pages

The layout and how you access the self-service transaction pages within the Personal Details component will vary based on your role security. The PeopleSoft application provides you with two Personal Details navigation methods based on user role:

- Personal Details Dashboard: This access method displays tiles on the Personal Details dashboard. The tiles contain live data that can help indicate to users if they need to perform actions. When accessing the transaction pages through the dashboard tiles, the title of the page will appear in the banner at the top of the page.

  To view this dashboard and tiles, you must be assigned the *Fluid Dashboard - Person Dtls* role.

- Personal Details Navigation Collection: This access method displays the fluid navigation collection folders and links in the left panel. When accessing the transaction pages through the navigation collection, the title of the page will appear on the content page.

  To view the navigation collection, you should *not* be assigned the *Fluid Dashboard - Person Dtls* role.

Note: Throughout this topic, the page illustrations show the individual transaction pages as it appears when accessing the pages through the navigation collection (with the page title on the page). Keep in mind that:
—When accessing the transaction pages through the dashboard, the title of the transaction does not appear on the page but rather in the banner above the page.
—When accessing the transaction pages through the navigation collection, even though the left navigation panel is not illustrated, remember that the navigation panel appears within the framework of the medium and large form factor pages.

Personal Details Dashboard

Use the Personal Details dashboard (cref HC_HR_PERS_DTLS_FL_GBL) to view dynamic data for personal details using tiles.

Navigation

Select the Personal Details tile.

Note: The Personal Details dashboard is displayed if the logged-in user is a member of the *Fluid Dashboard - Person Dtls* user role.

The Personal Details dashboard displays in a multi-tile layout and provides a two-step process to view and update personal information. This navigation type consists of the following pages and sections:

Dashboard Tiles

Displays self-service transaction tiles. Each tile lists pertinent data of the corresponding transaction for quick reference and indicates to the user if he or she needs to perform an action or the last time he or she updated the information. For example, many of the tiles display the last time a user updated the information, the number of details the user has recorded for the transaction, or if action needs to be or has been taken. Users can add, delete, or move tiles as needed using the Personalize Dashboard actions menu option. If a user does not have access to a transaction, then the tile will display a message indicating that he or she does not have access to this information.

Image: Personal Details Dashboard

This example illustrates Personal Details dashboard.

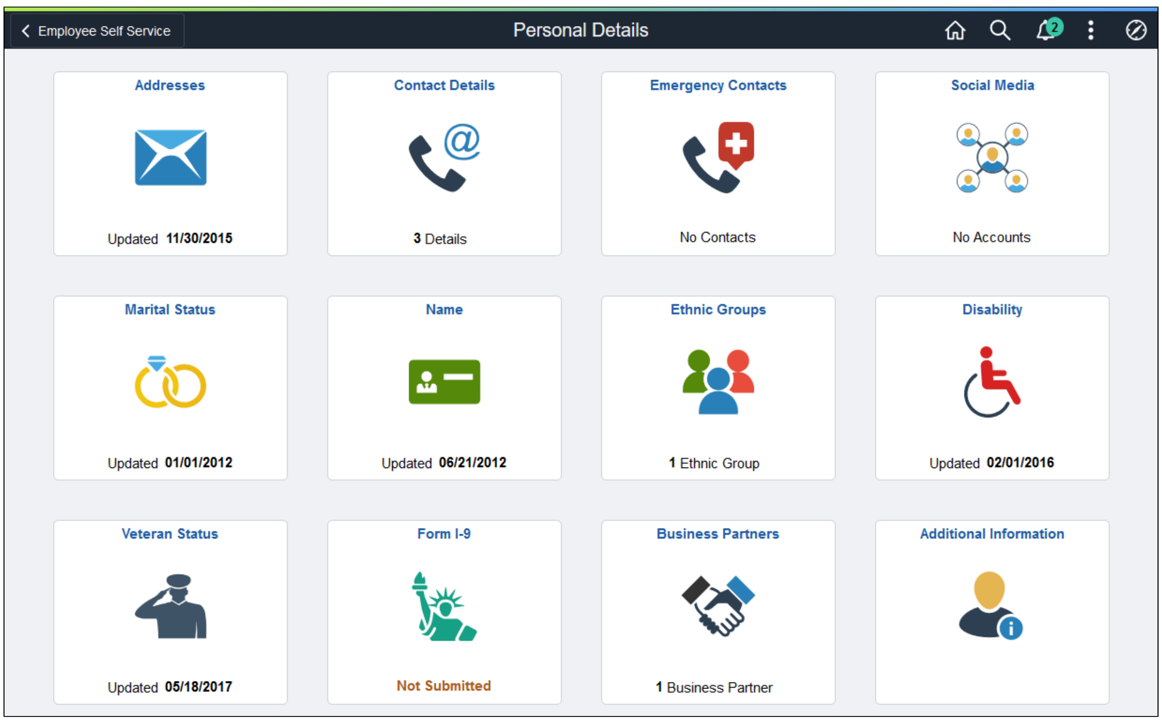


Image Highlights, PeopleSoft HCM Update Image 34: Self-Service Navigation Updates

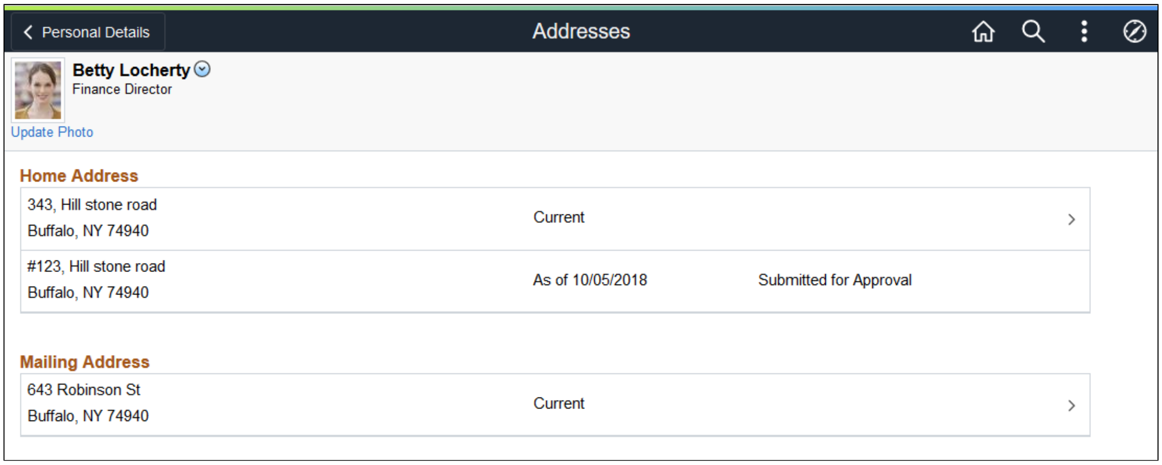
Select a tile to access the transaction page and view more details or potentially update transactional details.

Transaction Page

The Personal Details transaction pages display the employee content that corresponds to the transaction tile you selected on the dashboard and consists of the following sections:

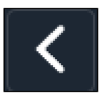
Image: Example of the Addresses Transaction Page Accessed from the Personal Details Dashboard

This example illustrates the Personal Details - Addresses page accessed from the Personal Details dashboard.



Banner and Page Title

The application displays the name of the transaction in the banner above the page after you select the tile.

 **Personal Details** Back button	Click the back button to return to the Personal Details dashboard and access other transaction tiles.

Header (Sub-Banner)

Below the banner, above the transaction content page, is the header and it includes the employee's name, job title, the Update Photo link if enabled on the Installation Table (Select Photo Page), and the Related Actions menu icon. The related actions icon provides access to additional self-service transactions, if applicable.

See "Common Header for Employee Self-Service Pages" (PeopleSoft HCM 9.2: Application Fundamentals)

Content

The page displays the employee content that corresponds to the transaction tile you selected on the dashboard.

Personal Details Navigation Collection

Use the Personal Details dashboard to view or update personal details within the context of a multi-panel layout.

Navigation

Select the Personal Details tile.

Note: The Personal Details navigation collection is displayed if the logged-in user is *NOT* a member of the *Fluid Dashboard - Person Dtls* user role.

Image: (Desktop or Tablet) Personal Details Navigation Collection and Page Layout

This example illustrates the Personal Details page layout for a larger device. The left panel navigation shows a list of pages and the content that corresponds to the current category appears in the right panel.

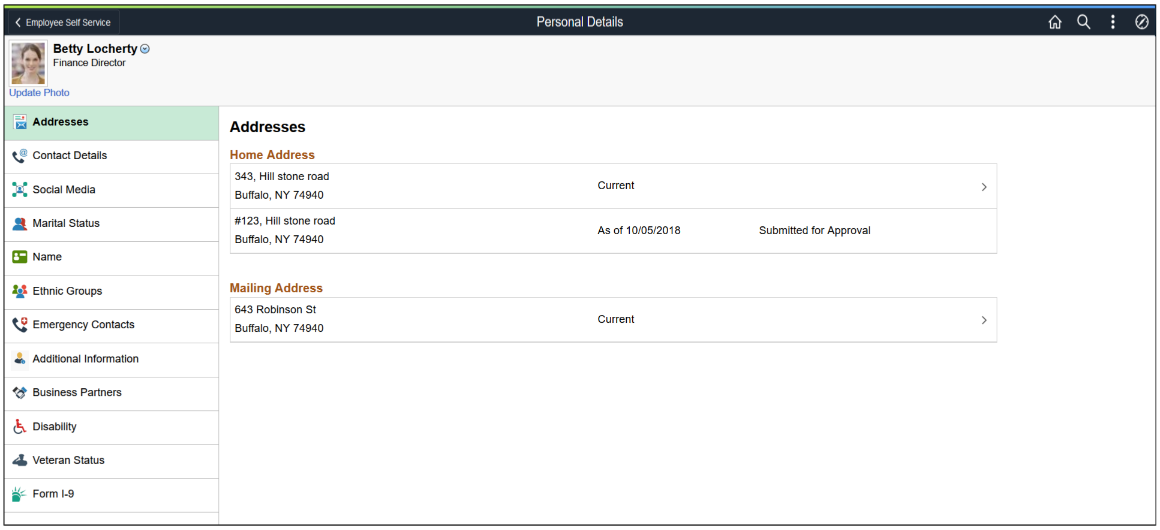
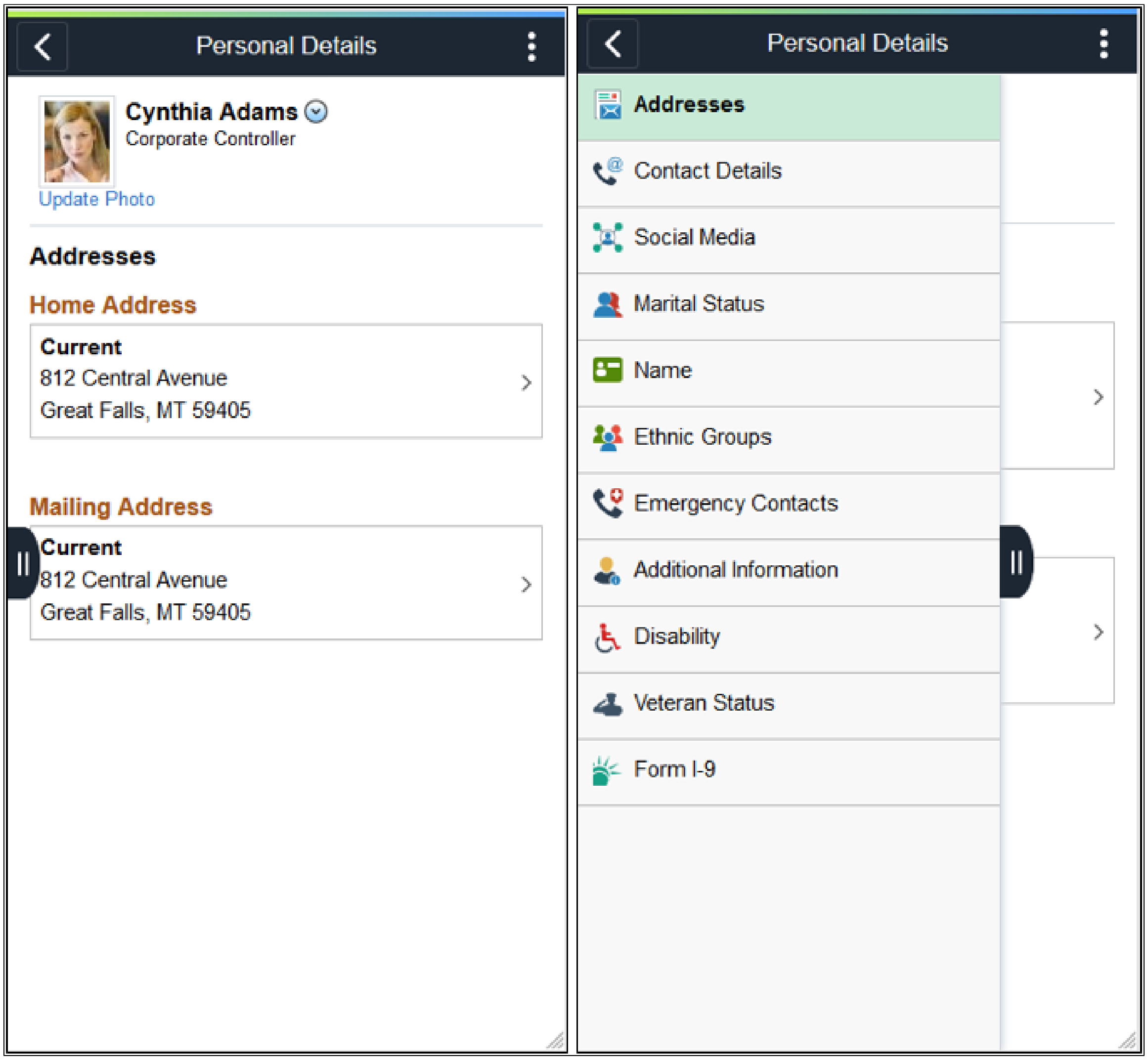


Image: (Smartphone) Personal Details Navigation Collection and Page Layout

This example illustrates the Personal Details page layout on a small form factor device. In the first image, the left panel is hidden, which is the default when you first access the Personal Details pages. In the second image, the left panel is exposed by clicking the navigation tab, which enables you to select other pages.



The Personal Details navigation collection page consists of the following panels and sections:

Header (Sub-Banner)

The top panel displays the header and includes the employee’s name, job title, if enabled on the Installation Table the Update Photo link (Select Photo Page), and the Related Actions menu icon. The related actions icon provides access to additional self-service transactions, if applicable.

See "Common Header for Employee Self-Service Pages" (PeopleSoft HCM 9.2: Application Fundamentals)

Content Navigation

You will access the panel navigation slightly differently when using a large or small form factor device:

- (Tablet or Desktop) *Left panel navigation*: When using a large form factor device, like a tablet or workstation, the Personal Details pages display a left navigation panel. This left panel lists the various page categories that make up the employee personal data. Select the navigation collection page name in the left panel to display the content in the right, or main panel. By default, the system displays the transaction page of the first navigation collection page.
- (Smartphone) *Hidden panel navigation*: When using a small form factor device, like a smartphone, select the show panel navigation tab in the middle, left of the page to expand the panel and select other Personal Details pages. The small form factor devices also show the page name in the banner. By default, the system displays the transaction page of the first navigation collection page.

 (show or hide panel navigation) tab	Select the left tab to display the navigation collection and access transaction pages.

Content Panel

The main panel displays the employee content that corresponds to the category, or transaction, you selected in the navigation panel. It is the default display when using a small device.

Select Photo Page

Use the Select Photo page to upload or select an employee photo to display in self-service and throughout the system.

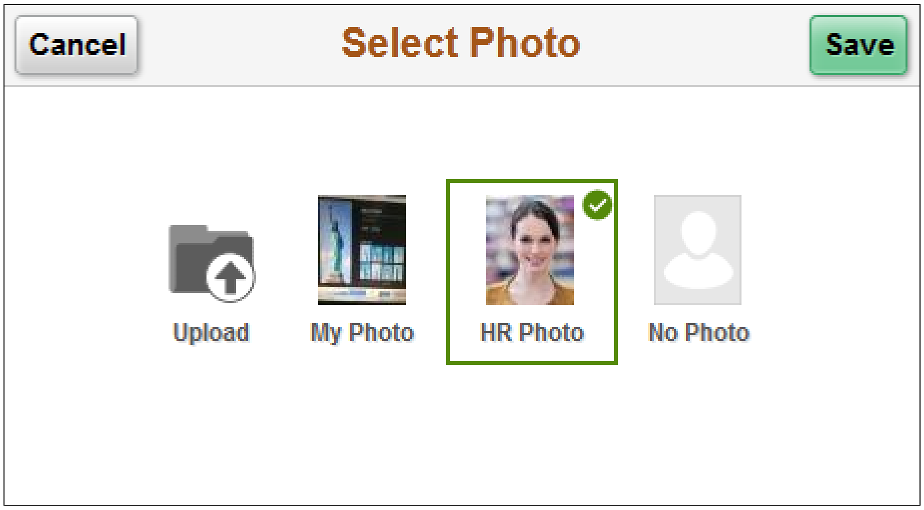
Navigation

Select the Update Photo link beneath the photo within the header of any of the Personal Details transaction pages.

Note: The Update Photo link is available only when the Allow Employee to Upload Photo option is enabled on the Installation Table - "HCM Options Page" (PeopleSoft HCM 9.2: Application Fundamentals)

Image: Select Photo page

This example illustrates the Select Photo page.



Use these option to choose the photo for pages that display an employee photo throughout the system:

Upload	Select to upload your own photo image. This image becomes the My Photo image. The photo must be a JPEG. The system will re-size photos to not exceed 256KB.
My Photo	Select this option to have the pages that display an employee photo show the latest photo image that you have uploaded. If you have not uploaded an image for yourself, this option is not available.
HR Photo	Select this option to have the pages that display an employee photo show the official HR photo image of yourself.
No Photo	Select this option to have the pages that display an employee photo show a dummy photo image.

Addresses (Summary) Page

Use the Addresses (Summary) page (HR_EE_ADDR_FL) to view your home address and mailing address.

Navigation

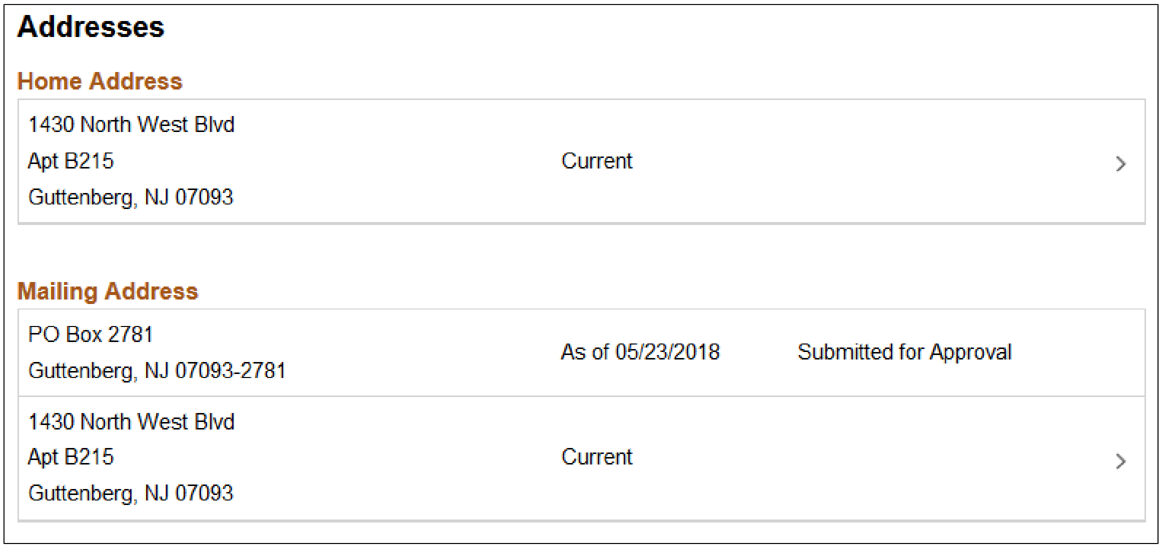
- Select the Personal Details tile on a PeopleSoft Fluid *Employee Self Service* home page.

  If you are already on a Personal Details fluid page, select the Addresses tab or tile.

- Self Service >Personal Information >Personal Details

Image: Addresses (summary) page

This example illustrates the Addresses (summary) page.



Note: The page display may vary by device and access method. For example, the transaction name appears on the content page when accessing the information from the navigation collection. When accessing the page from the Personal Details dashboard, the title of the page appears in the banner.

Select an address to view details on the Address (Detail) Page and make changes.

When using approvals (AWE) and the user submits a change request for this transaction, the row will show the current row and the proposed change request row. The change request row will show the as of date and the status that it has been sent for approval. You cannot access the address details for pending requests. If the request is approved, the new address will become the current row on the as of date, at which point the earlier address will no longer appear on the page.

For information on where to approve a request, see "Using Fluid Approvals to Approve Self Service Transaction Requests" (PeopleSoft HCM 9.2: eProfile Manager Desktop).

Address (Detail) Page

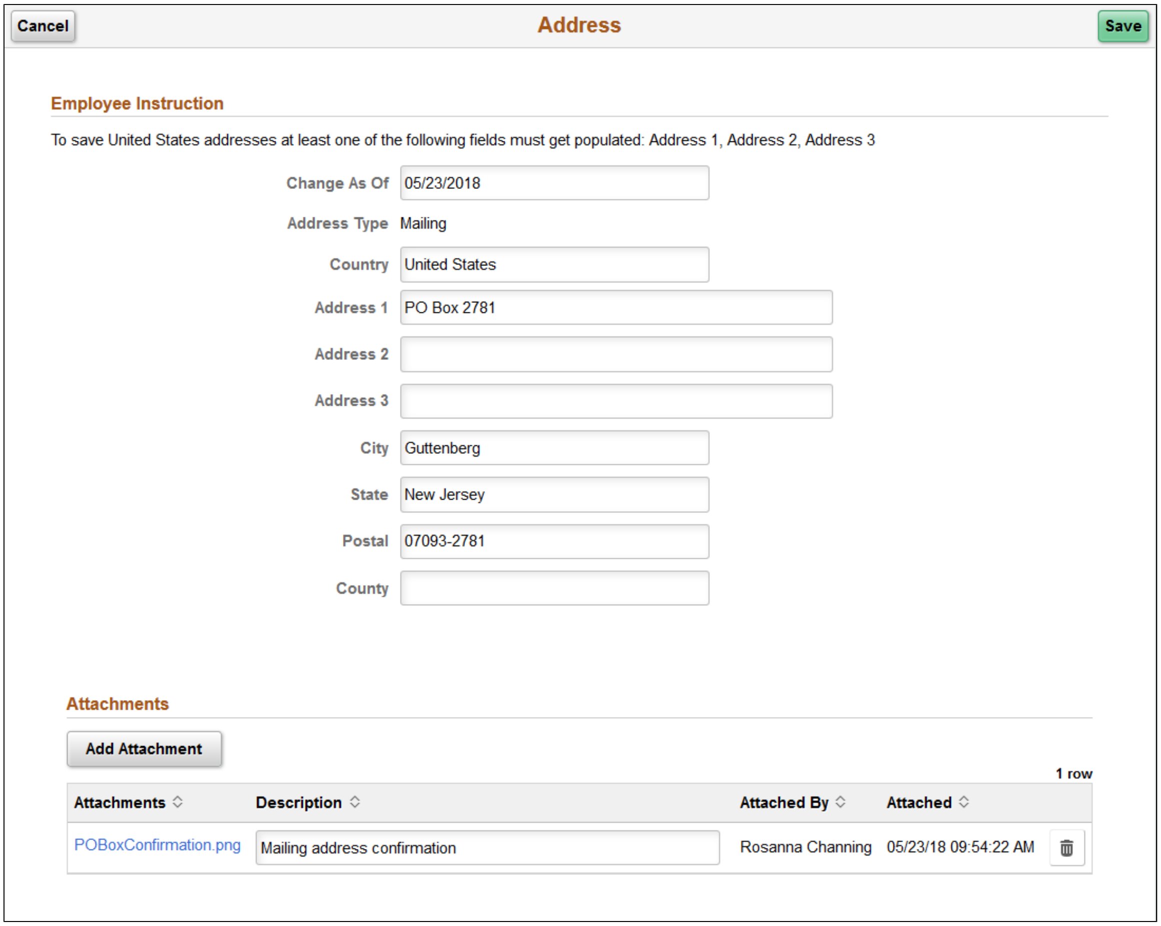
Use the Address (detail) page (ADDRESS_DFT_SCF) to update address information and view or add attachments that may support the update.

Navigation

- Select an address on the Addresses (summary) page to update an existing address.
- Select the Add Address button or icon to add a new address. This option is available for an address type (home or mailing address) only if no address currently exists.

Image: Address (detail) page

This example illustrates the Address (detail) page.



The address format varies depending on the value in the Country field.

When approvals workflow has been set up for this transaction and you select Save, the top of the page will display a confirmation that the transaction request has been sent for approval.

Attachments

Use this section to manage attachments by uploading, deleting, or updating attachments using fluid. Attachments are not accessible from the classic pages. Attachments are saved in the PS_HR_ESS_ADDR_ATT table. When a user submits an address change for approval, all attachments on this page will be sent with the request. To send an address change request without an attachment, remove the items from this section.

Add Attachment	Select this button to access the File Attachment page and upload files.
Attachments and **Description**	Select the link to download and view the attachment. Enter a description, or the field will use the attachment file name as the description upon saving the page, which you can overwrite.

(Delete) button	Select this button to remove an attachment from your personal details address page.

Managers use fluid Approvals to view attachments for an *Address Change* transaction request using the "Attachments Page" (PeopleSoft HCM 9.2: eProfile Manager Desktop).

The following videos provide an overview and demonstration of the Fluid Attachment framework:

PeopleSoft Fluid HCM Attachments

Image Highlights, PeopleSoft HCM Update Image 27: Fluid HCM Attachments Uptake for Address Transaction

Contact Details Page

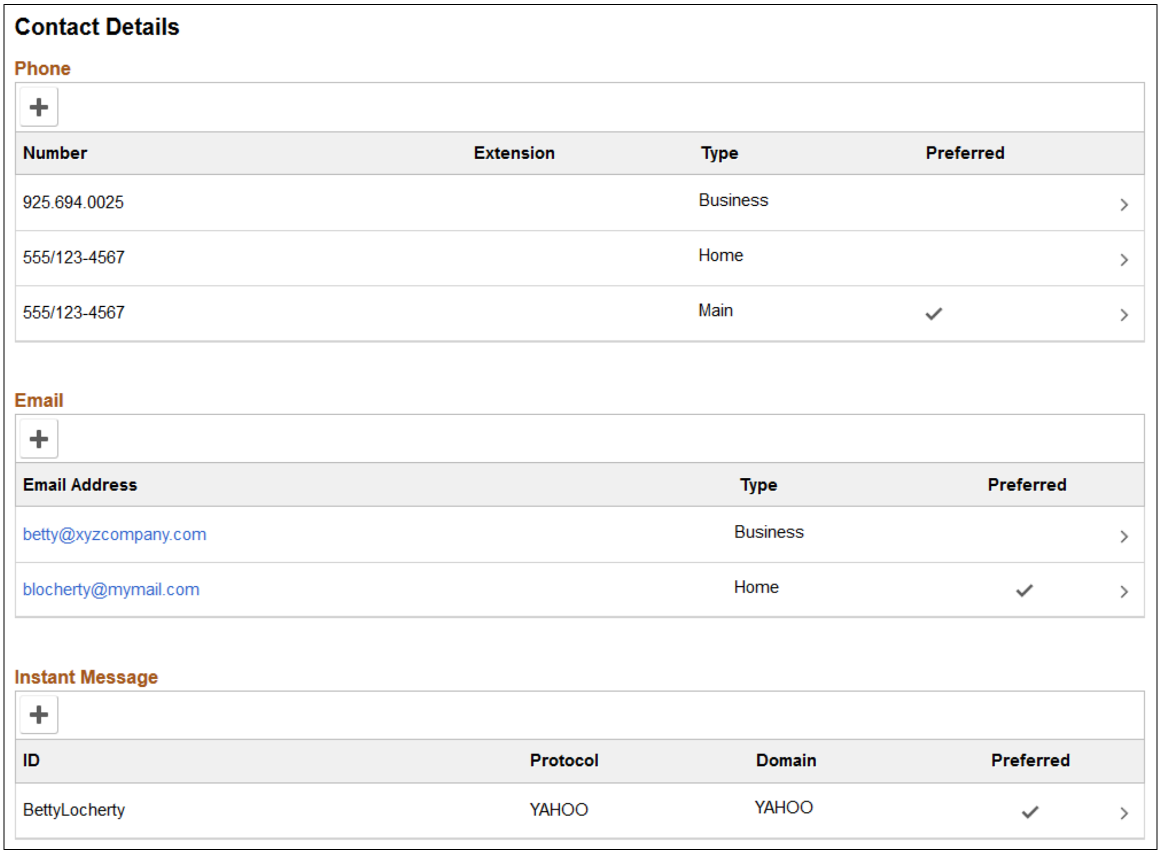
Use the Contact Details page (HR_EE_CONTACTS_FL) to review your phone numbers, email addresses, and instant messaging IDs.

Navigation

Select the Personal Details tile on a PeopleSoft Fluid *Employee Self Service* home page, then select the Contact Details tab or tile on the Personal Details page.

Image: Contact Details page

This example illustrates the Contact Details page.



Note: The page display may vary by device and access method. For example, the transaction name appears on the content page when accessing the information from the navigation collection. When accessing the page from the Personal Details dashboard, the title of the page appears in the banner.

Select a row to update or delete a contact type or select the Add button for a section to add a contact. This will take you to one of the following pages:

- Phone Number Page
- Email Address Page
- Email Address Page

Phone Number Page

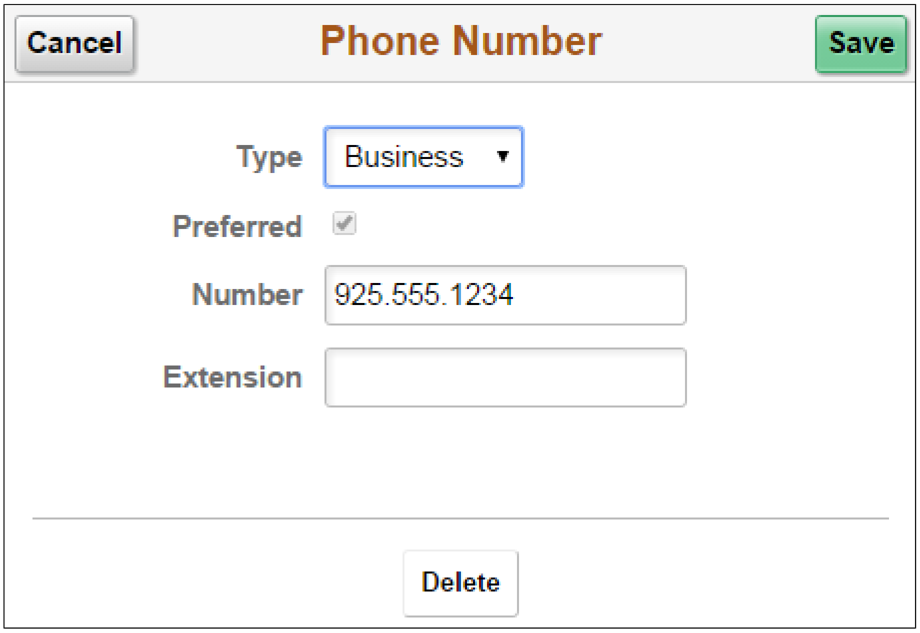
Use the Phone Number page (HR_CNCT_PHONE_SCF) to add, update, or delete a phone number

Navigation

- Select a phone number row on the Contact Details page to update or delete an existing phone number.
- Select the Add Phone Number button or icon to create a new phone number.

Image: Phone Number page

This example illustrates the Phone Number page.



Only one phone number can be preferred, so selecting the Preferred check box removes the preferred status from any other phone number.

Select the Delete button to remove the phone number. If you delete a preferred phone number, the system displays a confirmation message. If the delete is confirmed, the system automatically marks the first remaining phone number as preferred.

Email Address Page

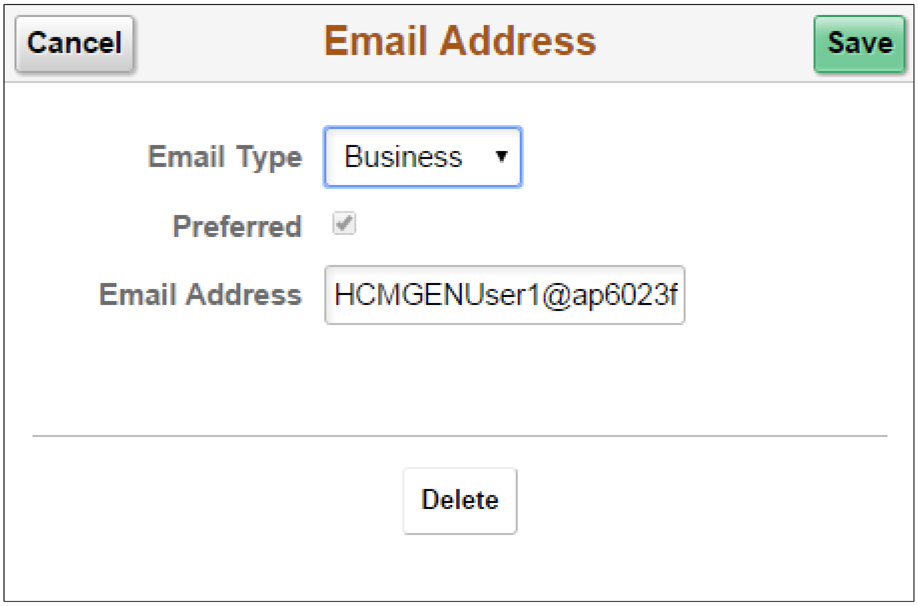
Use the Email Address page (HR_EMAIL_ADDRS_SCF) to add, update, or delete an email address.

Navigation

- Select an email address row on the Contact Details page to update or delete an existing email address.
- Select the Add Email Address button or icon to create a new email address.

Image: Email Address page

This example illustrates the Email Address page.



Only one email address can be preferred, so selecting the Preferred check box removes the preferred status from any other email address.

Select the Delete button to remove the email address. If you delete a preferred email address, the system automatically marks the first remaining email address as preferred.

Instant Message Page

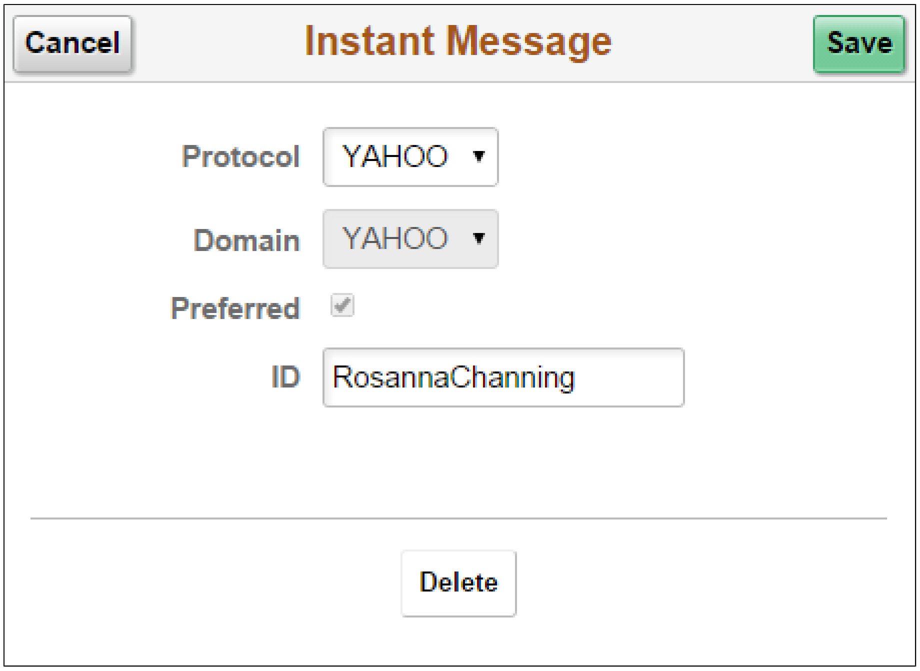
Use the Instant Message page (HR_IM_CHAT_SCF) to add, update, or delete an instant messaging ID.

Navigation

- Select an instant message ID row on the Contact Details page to update or delete an existing instant message ID.
- Select the Add Instant Message button or icon to create a new instant message ID.

Image: Instant Message page

This example illustrates the Instant Message page.



Only one instant message ID can be preferred, so selecting the Preferred check box removes the preferred status from any other instant message ID.

Select the Delete button to remove the phone number. If you delete a preferred instant message ID, the system displays a confirmation message. If the delete is confirmed, the system automatically marks the first remaining instant message ID as preferred.

Social Media (Summary) Page

Use the Social Media (Summary) page (HR_EE_SOC_MEDIA_FL) to review your social media accounts.

Navigation

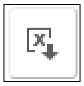
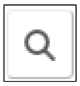
Select the Personal Details tile on a PeopleSoft Fluid *Employee Self Service* home page, then select the Social Media tab or tile on the Personal Details page.

Image: Social Media (summary) page

This example illustrates the Social Media (summary) page.

Note: The page display may vary by device and access method. For example, the transaction name appears on the content page when accessing the information from the navigation collection. When accessing the page from the Personal Details dashboard, the title of the page appears in the banner.

Select the Add (+) button to add a social media account or select a row to update or delete a social media account. Perform either of these actions to access the Social Media (Detail) Page where you maintain social media account information.

 Download to Excel Social Media button	Select this button to export the data to an Excel spreadsheet.
 Find Social Media button	Select this button to enter a search string and quickly locate a row of information.

Social Media (Detail) Page

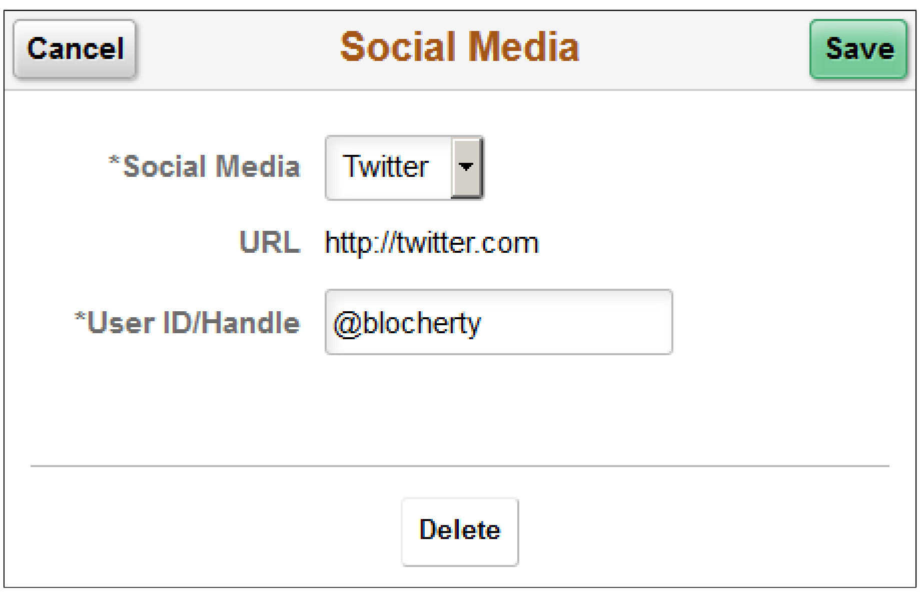
Use the Social Media (Detail) page (HR_SOC_MEDIA_SCF) to add, update, or delete social media accounts on your personal profile.

Navigation

- Select a social media row on the Social Media (Summary) page to update or delete an existing social media account.
- Select the Add Social Media button to create a new social media account.

Image: Social Media (detail) page

This example illustrates the Social Media (detail) page.



Use this page to add, update, or delete your social media accounts. Unlike other pages in the Personal Details pages, this does not update information stored in HR Personal Data pages.

Social Media and **URL**	Select a social media type. When you select a social medial type, the URL field displays. Valid social media types and their URLs are defined on the "Social Media Type Page" (PeopleSoft HCM 9.2: Application Fundamentals). You can add only one account per social media type. After you have entered information for a social media type, that type no longer appears in the drop-down list.
User ID/Handle	Enter the user ID or handle for the social media account.

Marital Status Page

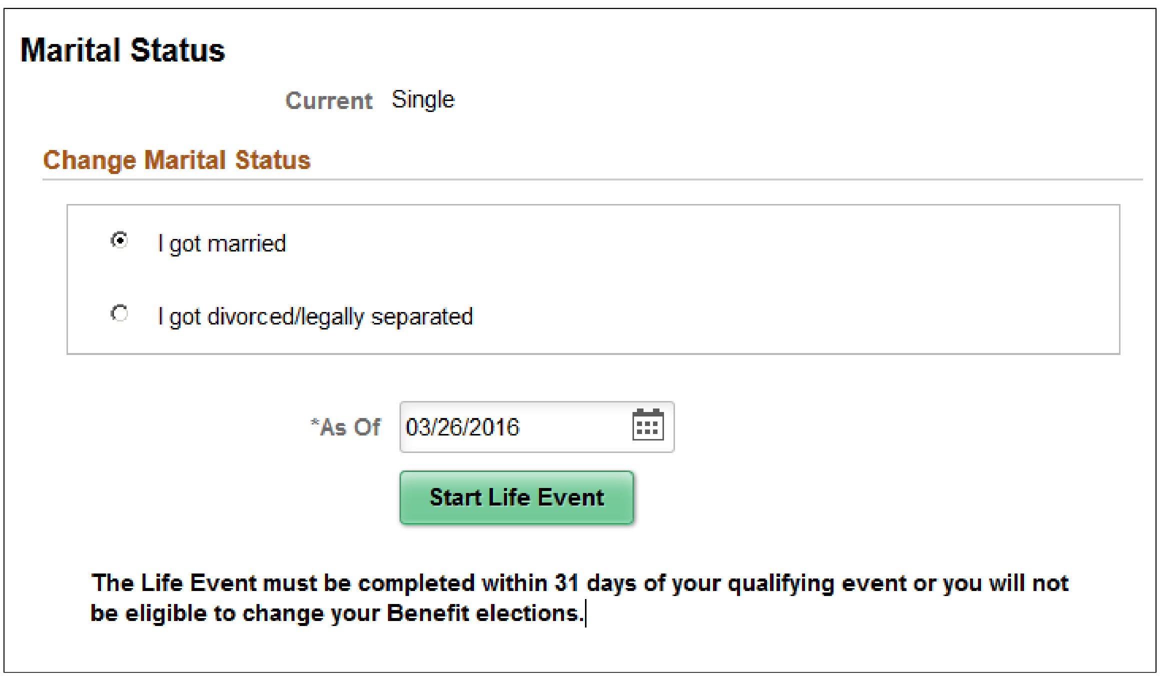
Use the Marital Status page (W3EB_SEL_EVNT_FLU) to initiate a marital status change life event.

Navigation

Select the Personal Details tile on a PeopleSoft Fluid *Employee Self Service* home page, then select the Marital Status tab or tile on the Personal Details page.

Image: Marital Status page with eBenefits

This example illustrates the Marital Status page as it appears when PeopleSoft eBenefits is selected on the Installation Table - "Products Page" (PeopleSoft HCM 9.2: Application Fundamentals).



Note: The page display may vary by device and access method. For example, the transaction name appears on the content page when accessing the information from the navigation collection. When accessing the page from the Personal Details dashboard, the title of the page appears in the banner.

When PeopleSoft eBenefits is installed, the Marital Status page lists your organization’s life event options that relate to marital status changes. As delivered, this includes the “I got married” event and the “I got divorced/legally separated event,” but these are configurable.

When you select the type of marital status change, the page displays a message with information about the time period within which the life event information must be submitted (for example, within 31 days of the event).

Next you enter the event date in the As Of field and select the Start Life Event button. The system then displays the life event pages where you complete the transaction.

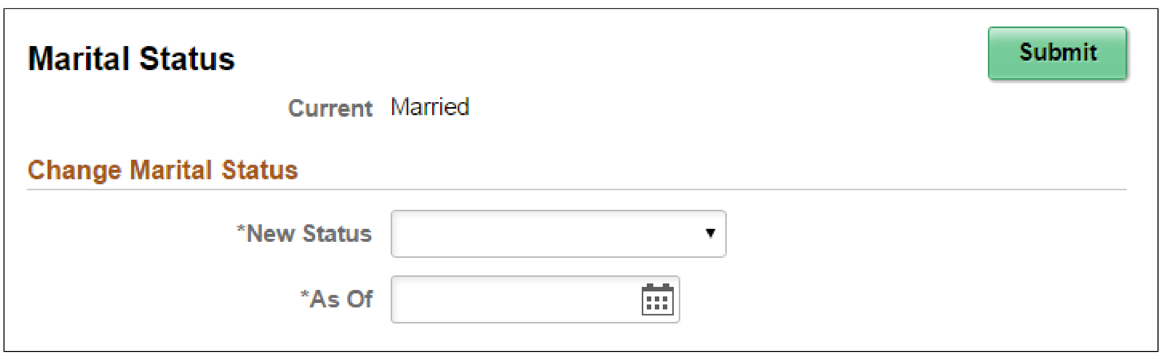
For information about the pages used for the two delivered marital status change events, see the following topics:

- "Processing the Marriage Event" (PeopleSoft HCM 9.2: eBenefits)
- "Processing the Divorce Event" (PeopleSoft HCM 9.2: eBenefits)

For information on where to approve a request, see "Using Fluid Approvals to Approve Self Service Transaction Requests" (PeopleSoft HCM 9.2: eProfile Manager Desktop) and "Pages Used to Approve Self Service Transaction Requests Using Fluid Approvals" (PeopleSoft HCM 9.2: eProfile Manager Desktop).

Image: Marital Status page without eBenefits

This example illustrates the Marital Status page as it appears when PeopleSoft eBenefits is not installed.



When PeopleSoft eBenefits is not installed, enter marital status change information and submit the changes directly on the Marital Status page.

Name (Summary) Page

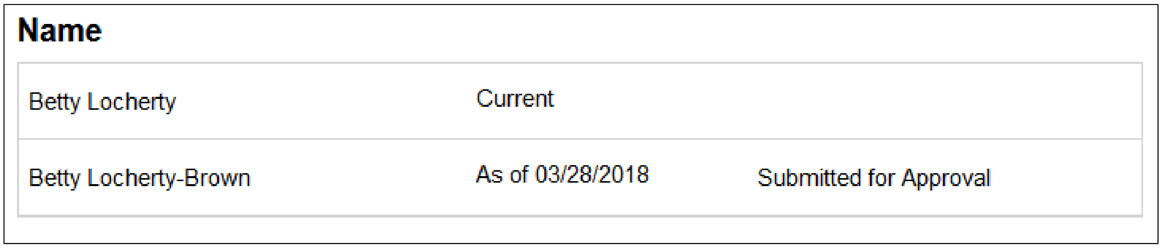
Use the Name (summary) page (HR_EE_NAME_FL) to view your current name and any pending name change requests.

Navigation

Select the Personal Details tile on a PeopleSoft Fluid *Employee Self Service* home page, then select the Name tab or tile on the Personal Details page.

Image: Name (summary) page

This example illustrates the Name (summary) page.



Note: The page display may vary by device and access method. For example, the transaction name appears on the content page when accessing the information from the navigation collection. When accessing the page from the Personal Details dashboard, the title of the page appears in the banner.

In this example, the employee has submitted a name change request. If the request is approved, the new name will become the current name on the As Of date, at which point the earlier name will no longer appear on the page.

For information on where to approve a request, see "Using Fluid Approvals to Approve Self Service Transaction Requests" (PeopleSoft HCM 9.2: eProfile Manager Desktop).

Because there is a pending name change request, selecting the names does not display the name details. When there is no pending name change request, selecting the current name displays the Name (Detail) Page.

Name (Detail) Page

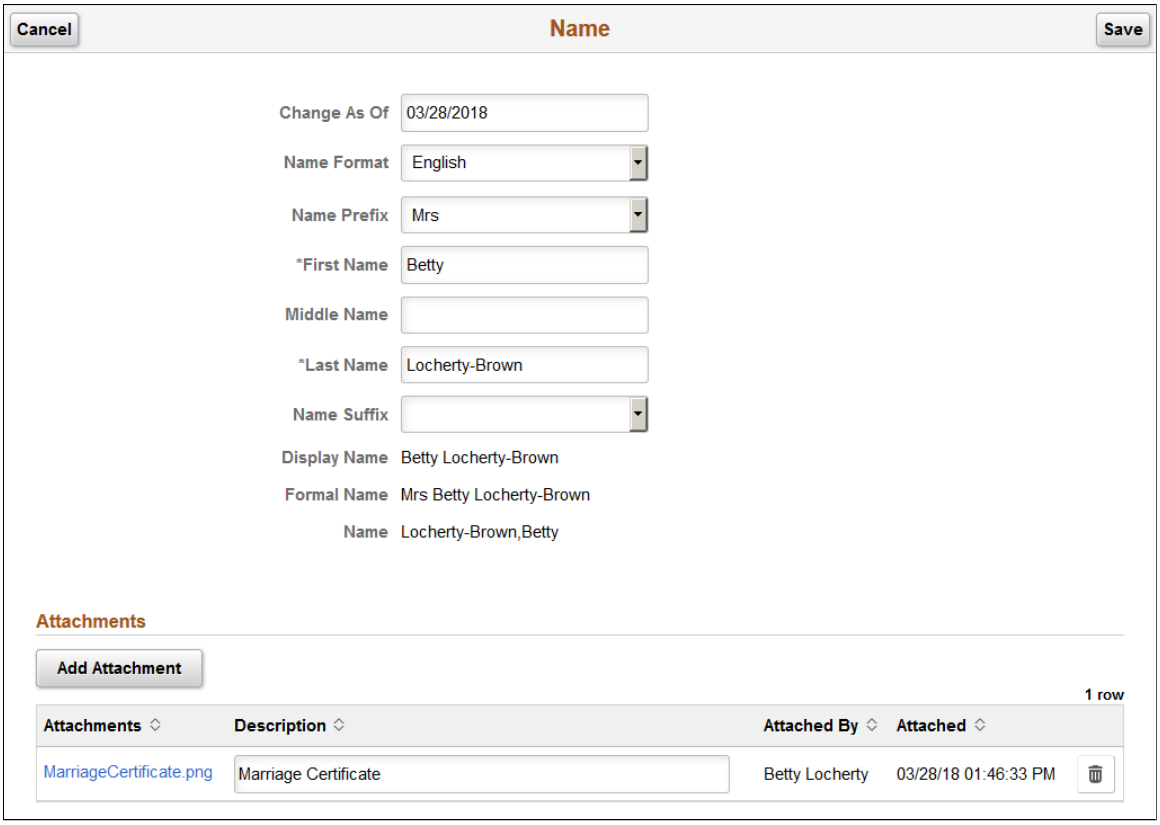
Use the Name (detail) page (NAME_DFT_SCF) to enter name change information and view or add attachments to support the change.

Navigation

Select your name on the Name (summary) page.

Image: Name (detail) page

This example illustrates the Name (detail) page.



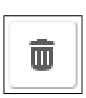
The fields on this page vary depending on the value in the Name Format field.

If approvals are required for name changes, submitting a name change request starts the approval process, and no further name changes requests are permitted until the active request is approved or denied.

Managers can use fluid Approvals to take action on a *Name Change* transaction request using the "Pending Approvals - <Transaction Name> Page" (PeopleSoft HCM 9.2: eProfile Manager Desktop).

Attachments

Use this section to manage attachments by uploading, deleting, or updating attachments. When a user submits a name change for approval, all attachments on this page will be sent with the request. To send a name change request without an attachment, remove the items from this section.

Add Attachment	Select this button to access the File Attachment page and upload files.
Attachments	Select the link to download and view the attachment. Enter a description, or the field will use the attachment file name as the description upon saving the page, which you can overwrite.
 (Delete) button	Select this button to remove an attachment from your personal details name page.

Managers use fluid Approvals to view attachments for a *Name Change* transaction request using the "Attachments Page" (PeopleSoft HCM 9.2: eProfile Manager Desktop).

The following videos provide an overview and demonstration of the Fluid Attachment framework:

PeopleSoft Fluid HCM Attachments
Image Highlights, PeopleSoft HCM Update Image 26: Fluid Attachments -- HR Core

Ethnic Groups Page

Use the Ethnic Groups page (HR_ETHNIC_GRP_FL) to view your ethnic group data.

Navigation

Select the Personal Details tile on a PeopleSoft Fluid *Employee Self Service* home page, then select the Ethnic Groups tab or tile on the Personal Details page.

Image: Ethnic Groups page: two-question format

This example illustrates the Ethnic Groups page as it appears when two-question format is activated on the USA section on the Installation Table - "Country Specific Page" (PeopleSoft HCM 9.2: Application Fundamentals).

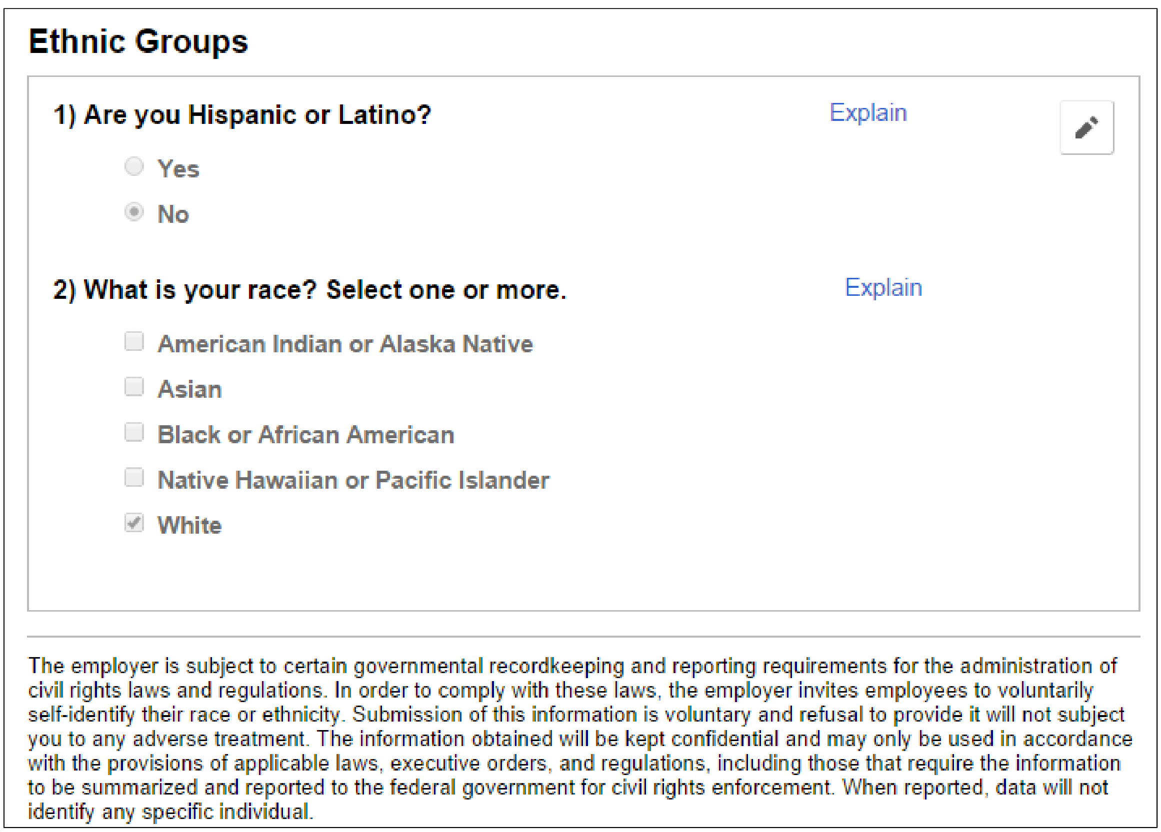
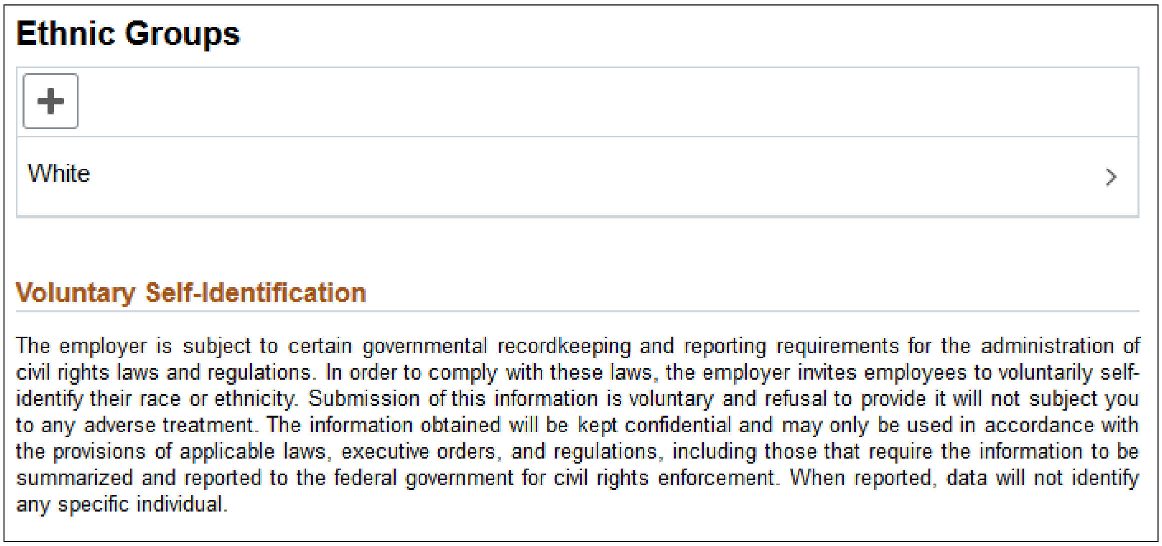


Image: Ethnic Groups page: list of ethnic groups

This example illustrates the Ethnic Groups page as it appears when the two-question format is not used. In this mode, the page lists specific ethnic groups.



Note: The page display may vary by device and access method. For example, the transaction name appears on the content page when accessing the information from the navigation collection. When accessing the page from the Personal Details dashboard, the title of the page appears in the banner.

To edit ethnicity information:

- When the page is in two-question mode, select the Edit icon (or select the questions anywhere except on the Explain links) to access the Ethnicity page.

  Select the Explain links to view definitions of the terms used in the questions.

- When the page is not in two-question mode, select an existing ethnic group to view and update it, or select the Add an Ethnic Group button or icon to add an additional ethnic group.

Ethnicity Page

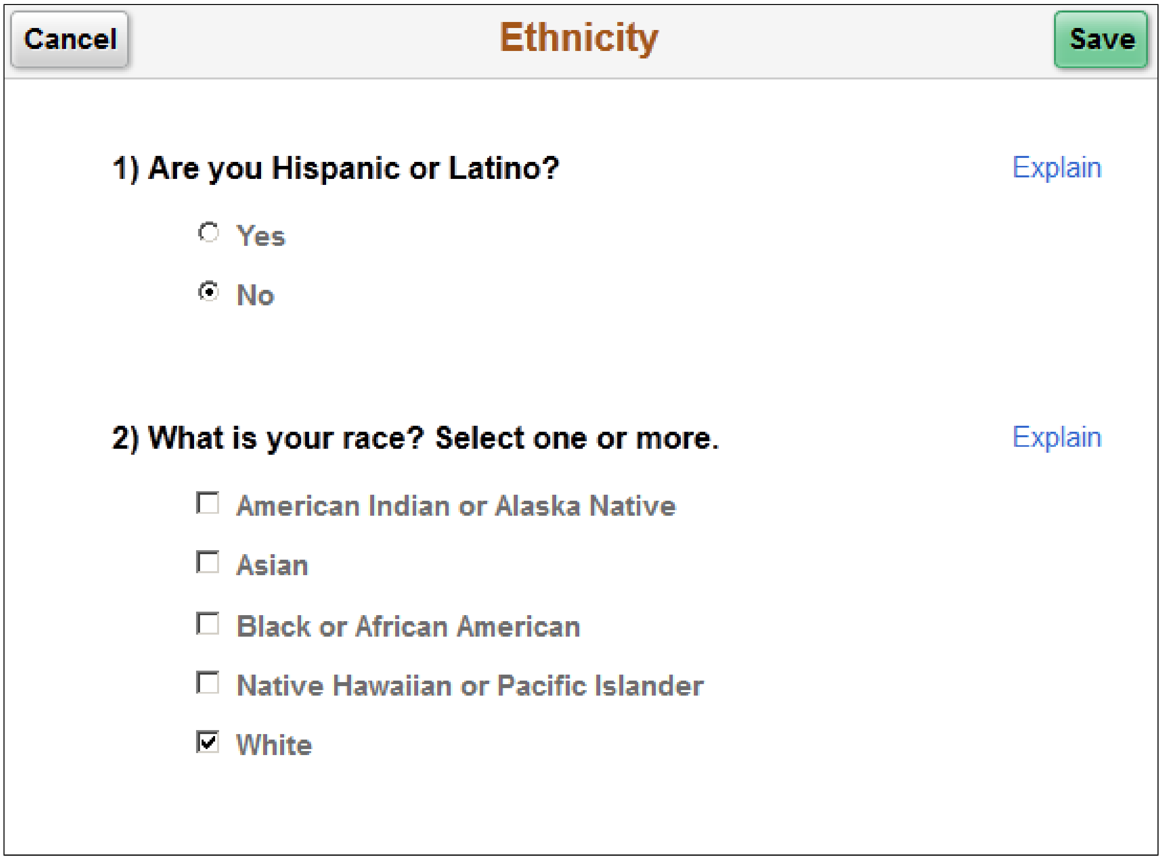
Use the Ethnicity page (HR_ETHNIC_GRP2_SCF) to enter ethnicity information when the system is configured to collect the information using the two-question format.

Navigation

Select the ethnicity information on the Ethnic Groups page when the page displays information in the two-question format.

Image: Ethnicity page

This example illustrates the Ethnicity page.



Ethnic Group Page

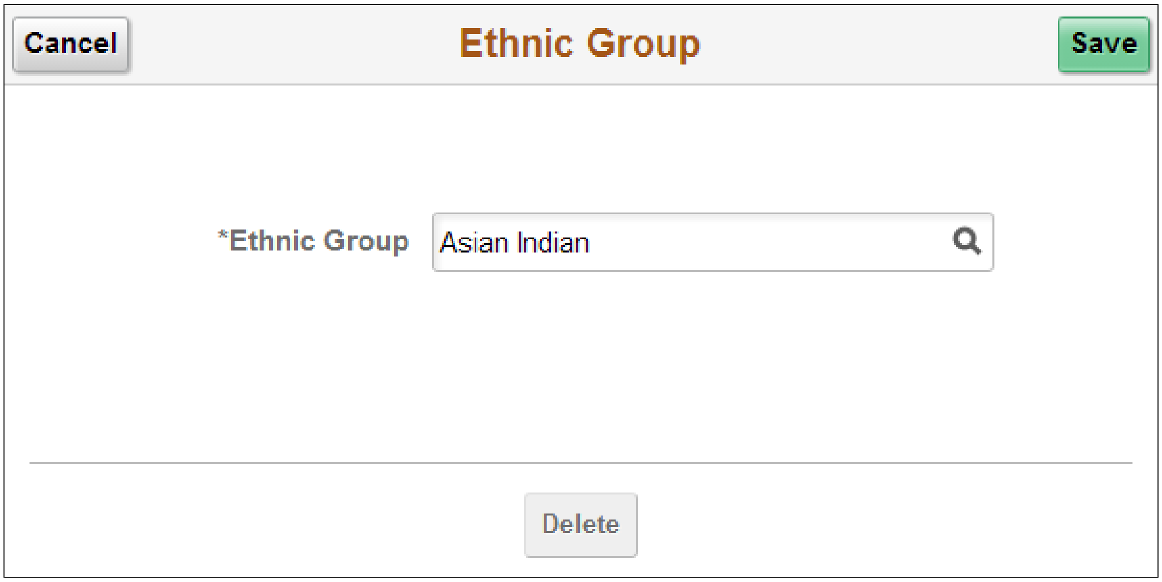
Use the Ethnic Group page (HR_ETHNIC_GRP_SCF) to add, update, or remove an ethnic group from your personal data.

Navigation

- Select an ethnic group on the Ethnic Groups page to modify or delete an existing ethnic group.
- Select the Add an Ethnic Group button or icon to add a new ethnic group.

Image: Ethnic Group page

This example illustrates the Ethnic Group page.



Select the Delete button to remove the ethnic group.

Emergency Contacts (Summary) Page

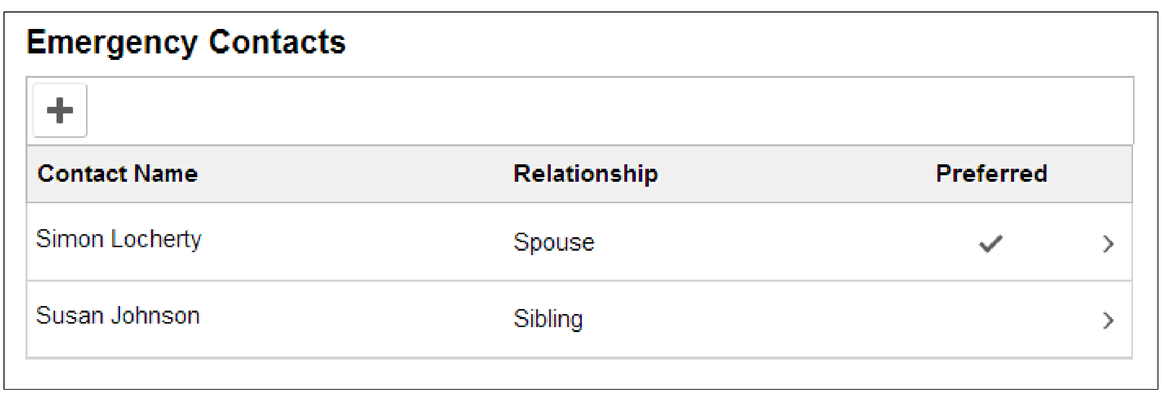
Use the Emergency Contacts (summary) page (HR_EMERG_CNTCT_FL) to view a list of your emergency contacts.

Navigation

Select the Personal Details tile on a PeopleSoft Fluid *Employee Self Service* home page, then select the Emergency Contacts tab or tile on the Personal Details page.

Image: Emergency Contacts (summary) page

This example illustrates the Emergency Contacts (summary) page.



Note: The page display may vary by device and access method. For example, the transaction name appears on the content page when accessing the information from the navigation collection. When accessing the page from the Personal Details dashboard, the title of the page appears in the banner.

Select an existing emergency contact to view and update the contact's information or to delete the contact. Select the Add an Emergency Contact icon to create a new contact.

Emergency Contact (Detail) Page

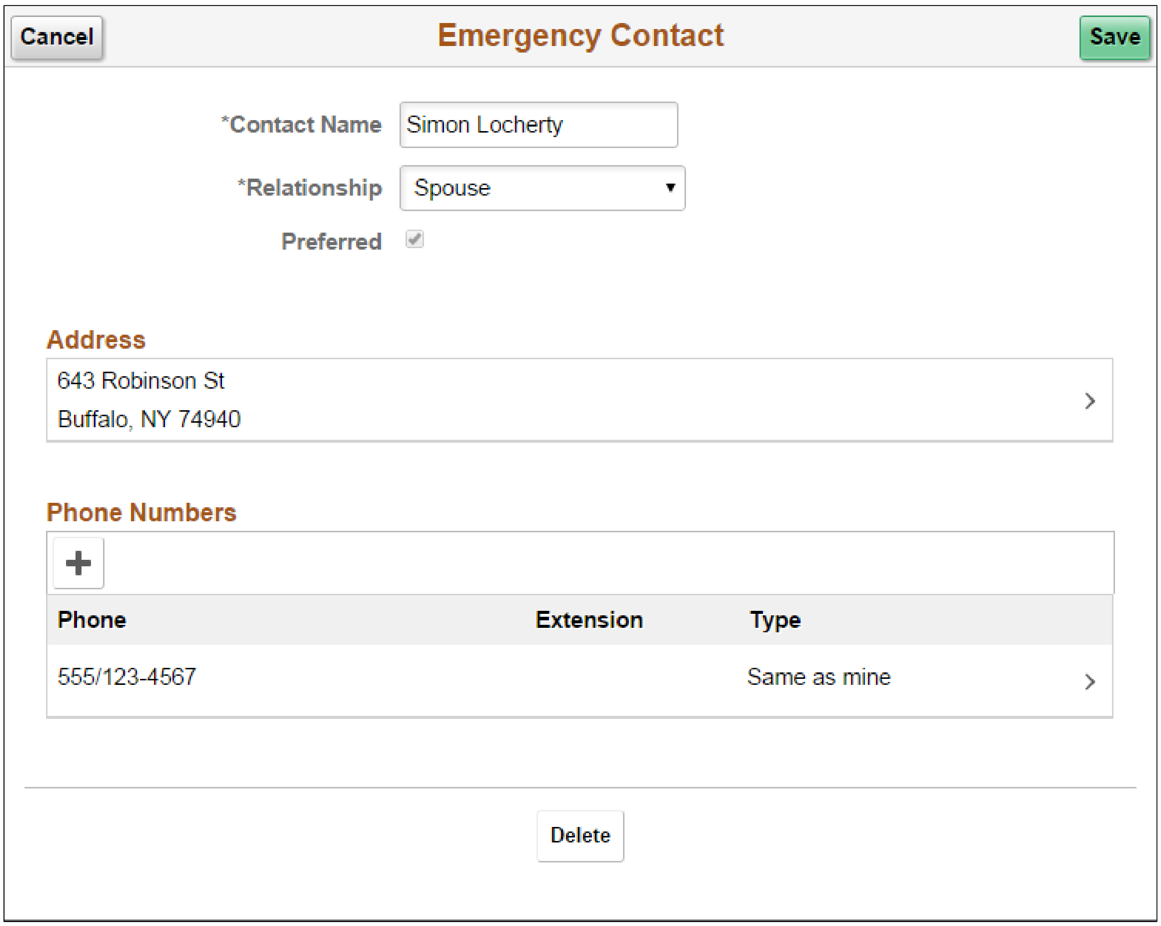
Use the Emergency Contact (detail) page (HR_EMERG_CNTCT_SCF) to add, update, or delete an emergency contact.

Navigation

Select an emergency contact on the Emergency Contacts (summary) page, or select the Add Emergency Contact button or icon.

Image: Emergency Contact (detail) page

This example illustrates the Emergency Contact (detail) page.



On this page, the contact name and relationship are enterable. Existing address and phone number information is read only. Select an existing address or phone number to edit or delete it.

You can provide multiple phone numbers for an emergency contact, but only one address.

Select the Delete button to remove the emergency contact.

Emergency Contact - Address Page

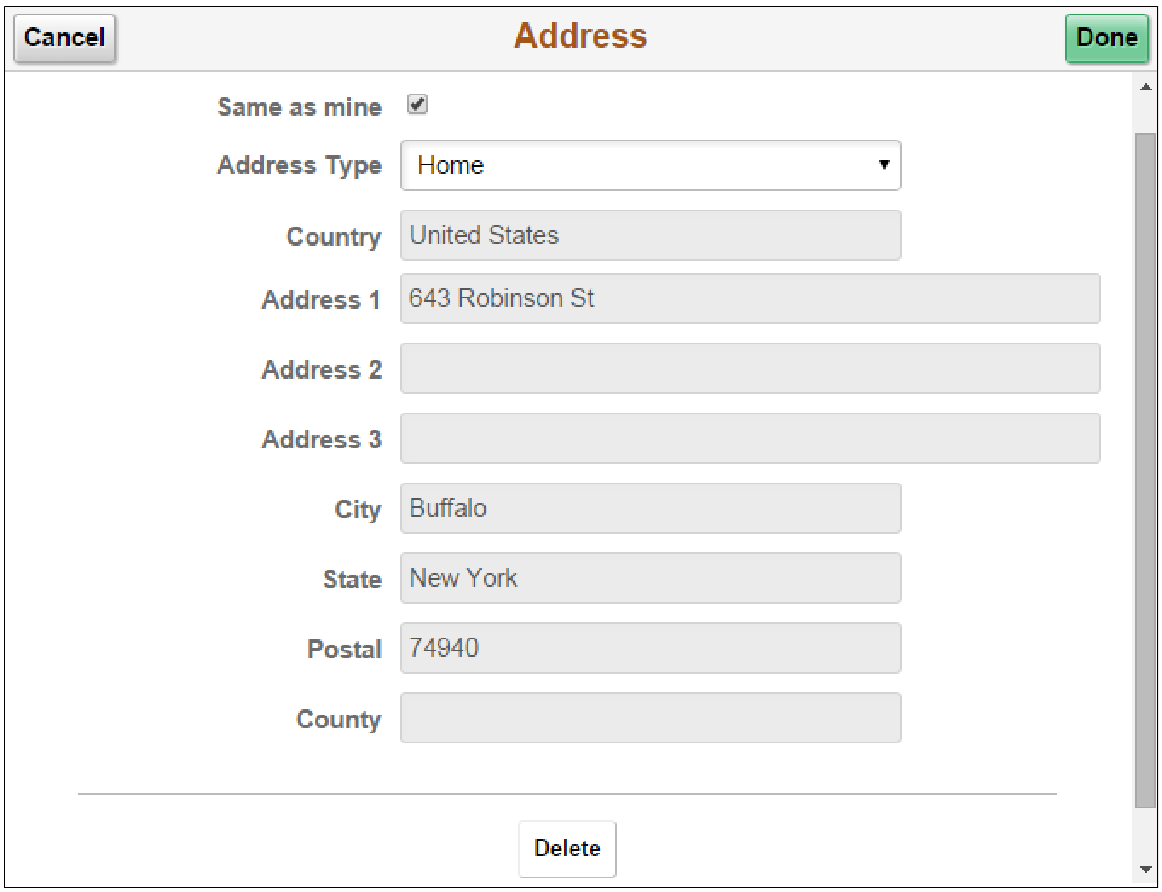
Use the Emergency Contact - Address page (HR_EMERG_ADDR_SCF) to add, update, or delete an address for an emergency contact.

Navigation

On the Emergency Contact (summary) page, select an existing address, or select the Add button that appears if no addresses exist.

Image: Emergency Contact - Address page

This example illustrates the Emergency Contact - Address page.



Users can either select the Same as Mine check box or manually enter a different address. Selecting the Same as mine check box populates the address detail fields and makes them read-only. The Address Type field remains editable regardless of whether the Same as Mine check box is selected.

The address format varies depending on the value in the Country field.

Emergency Contact - Phone Page

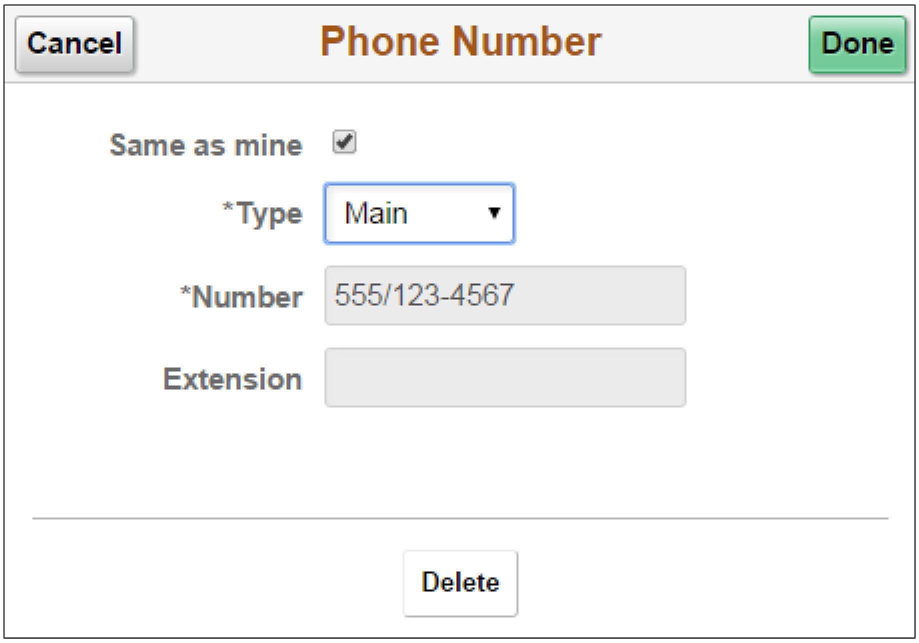
Use the Emergency Contact - Phone page (HR_EMERG_PHONE_SCF) to add, update, or delete a phone number for an emergency contact.

Navigation

On the Emergency Contact (summary) page, select an existing phone number, or select the Add Phone Number button or icon.

Image: Emergency Contact - Phone Number page

This example illustrates the Emergency Contact - Phone Number page.



Users can either select the Same as Mine check box or manually enter a different phone number. Selecting the Same as Mine check box populates the phone number detail fields and makes them read-only. The Type field remains editable regardless of whether the Same as Mine check box is selected.

Additional Information Page

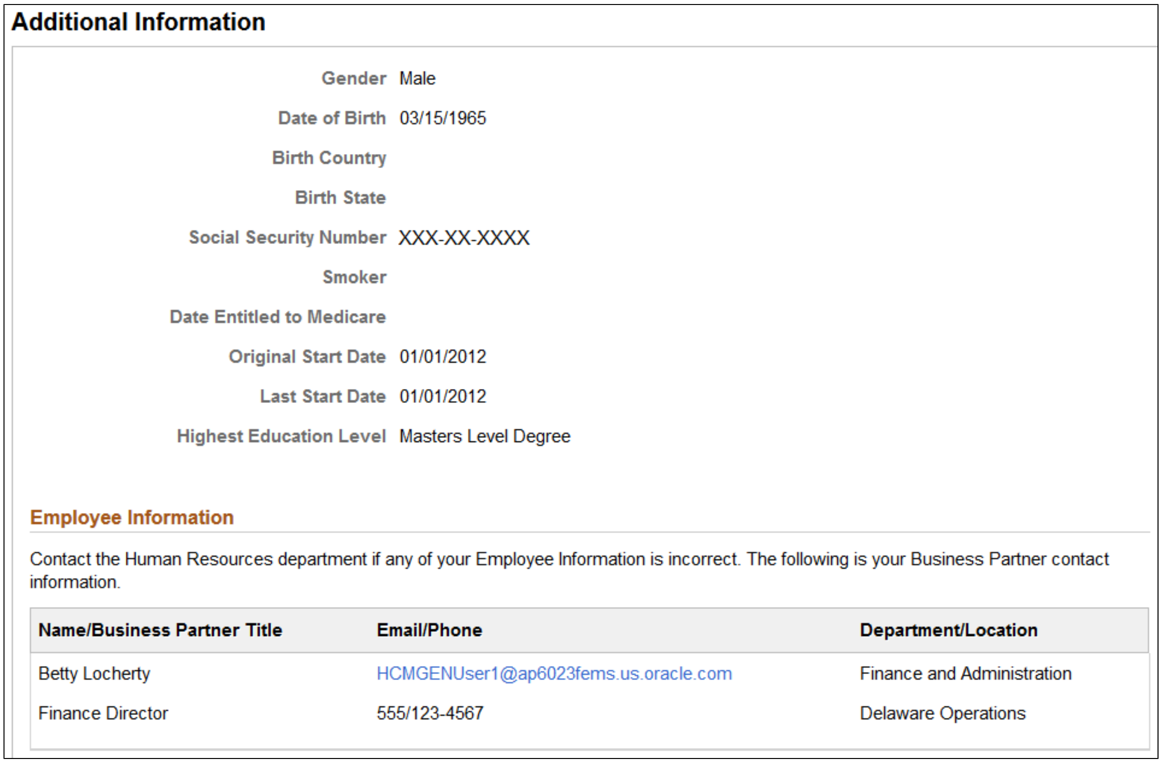
Use the Additional Information page (HR_ADDTL_INFO_FL) to review miscellaneous personal information.

Navigation

Select the Personal Details tile on a PeopleSoft Fluid *Employee Self Service* home page, then select the Additional Information tab or tile on the Personal Details page.

Image: Additional Information page

This example illustrates the Additional Information page.


Additional Information

Gender	Male
Date of Birth	03/15/1965
Birth Country	
Birth State	
Social Security Number	XXX-XX-XXXX
Smoker	
Date Entitled to Medicare	
Original Start Date	01/01/2012
Last Start Date	01/01/2012
Highest Education Level	Masters Level Degree

Employee Information

Contact the Human Resources department if any of your Employee Information is incorrect. The following is your Business Partner contact information.

Name/Business Partner Title	Email/Phone	Department/Location
Betty Locherty	HCMGENUser1@ap6023fems.us.oracle.com	Finance and Administration
Finance Director	555/123-4567	Delaware Operations

Note: The page display may vary by device and access method. For example, the transaction name appears on the content page when accessing the information from the navigation collection. When accessing the page from the Personal Details dashboard, the title of the page appears in the banner and other headings may appear on the page.

Users cannot edit the information that appears on this page. Instead, informational text directs users to contact the human resources department if information is incorrect.

Employee Information

This section will display your Human Resources business partner contact information when you are associated with a Human Resources business partner team.

When you are not part of a business partner team, this section will display a message to contact the Human Resources department if any of your employee information is incorrect.

This video demonstrates the HR Business Partners feature enhancement:

Image Highlights, PeopleSoft HCM Update Image 32: HR Business Partner Enhancements

For more information on business partners and business partner setup, see the "Configuring Business Partners" (PeopleSoft HCM 9.2: Human Resources Administer Workforce) documentation.

Business Partners Page

Use the Business Partners page (HR_EE_BUS_PRTNR_FL) to view your business partners and their contact information.

Navigation

- Select the Personal Details tile on a PeopleSoft Fluid *Employee Self Service* home page, then select the Business Partners tab or tile on the Personal Details page.
- From the "OnBoarding Dashboard" (PeopleSoft HCM 9.2: Human Resources Administer Workforce), select the "Business Partners Tile" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

  (This option is available for those workers who have an OnBoarding activity guide in progress.)

Note: The Personal Details page will not display the Business Partners tab if the person who is viewing this page is not associated with a business partner team or if the team is not configured to display on Personal Details. For configuration settings, see the "Configure Business Partner Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

Image: Business Partners page

This example illustrates the Business Partners page.

Business Partners

Name/Business Partner Title	Email/Phone	Department/Location
Jeanette Lee Human Resource Director	HCMGENUser1@ap6023fems.us.oracle.com 203/324-9873	Human Resources Corporation Headquarters
USA Benefits Group Benefits Specialist	benefits@gbi.com 555/222-1111	Benefits Corporation Headquarters

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Note: The page display may vary by device and access method. For example, the transaction name appears on the content page when accessing the information from the navigation collection. When accessing the page from the Personal Details dashboard, the title of the page appears in the banner and other headings may appear on the page.

Use this page to view your business partner contact information.

This video demonstrates the HR Business Partners feature:

Image Highlights, PeopleSoft HCM Update Image 31: HR Business Partners

Disability - Voluntary Self-Identification of Disability Page

Use the Voluntary Self-Identification of Disability page (HR_DISABILITY_FL) to complete and file Form CC-305 disability data electronically.

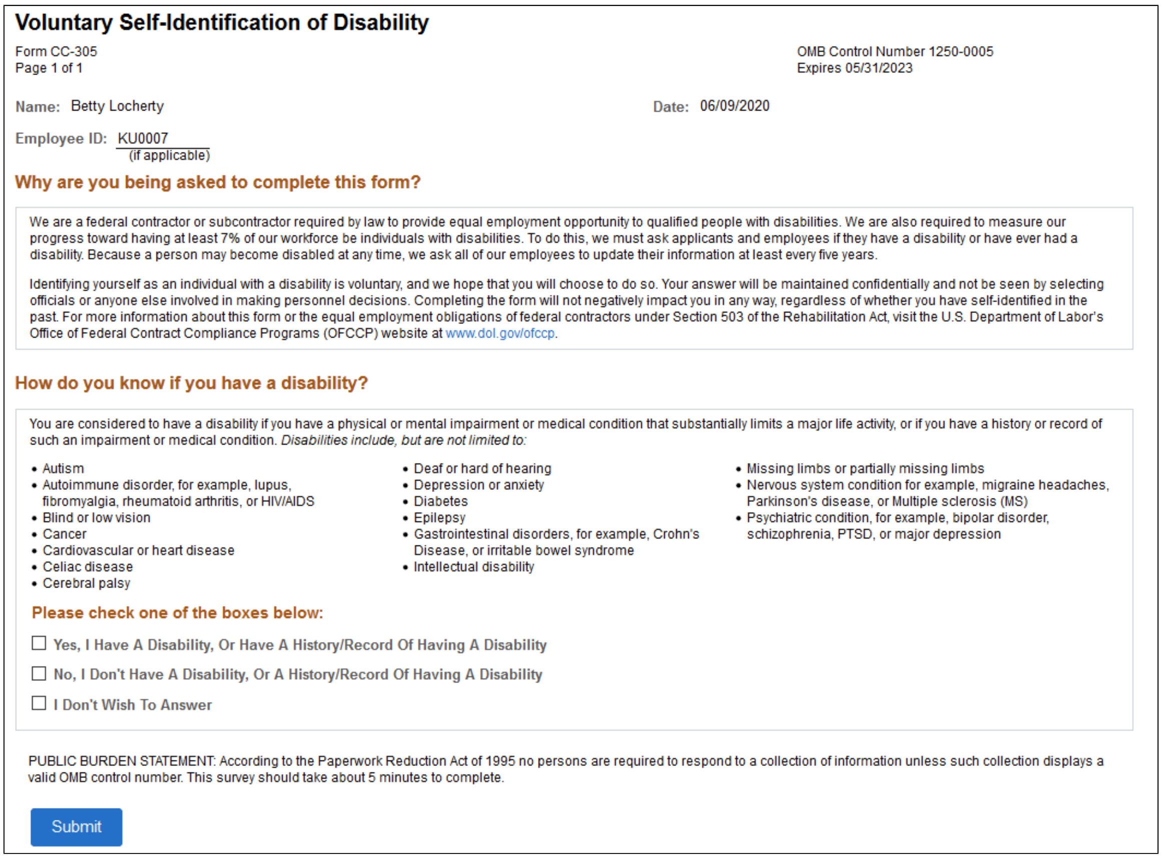
Navigation

Select the Personal Details tile on a PeopleSoft Fluid *Employee Self Service* home page, then select the Disability tab or tile on the Personal Details page.

Use PeopleTools security to grant or restrict component access for employee types based on your business needs. For example, if the page is to be accessed only by U.S. employees, you must add the page to the permission list and grant access to only those employees.

Image: Voluntary Self-Identification of Disability page

This example illustrates the Voluntary Self-Identification of Disability page.



Voluntary Self-Identification of Disability

Form CC-305
Page 1 of 1

OMB Control Number 1250-0005
Expires 05/31/2023

Name: Betty Locherty

Date: 06/09/2020

Employee ID: KU0007
(if applicable)

Why are you being asked to complete this form?

We are a federal contractor or subcontractor required by law to provide equal employment opportunity to qualified people with disabilities. We are also required to measure our progress toward having at least 7% of our workforce be individuals with disabilities. To do this, we must ask applicants and employees if they have a disability or have ever had a disability. Because a person may become disabled at any time, we ask all of our employees to update their information at least every five years.

Identifying yourself as an individual with a disability is voluntary, and we hope that you will choose to do so. Your answer will be maintained confidentially and not be seen by selecting officials or anyone else involved in making personnel decisions. Completing the form will not negatively impact you in any way, regardless of whether you have self-identified in the past. For more information about this form or the equal employment obligations of federal contractors under Section 503 of the Rehabilitation Act, visit the U.S. Department of Labor's Office of Federal Contract Compliance Programs (OFCCP) website at www.dol.gov/ofccp.

How do you know if you have a disability?

You are considered to have a disability if you have a physical or mental impairment or medical condition that substantially limits a major life activity, or if you have a history or record of such an impairment or medical condition. *Disabilities include, but are not limited to:*

- Autism
- Autoimmune disorder, for example, lupus, fibromyalgia, rheumatoid arthritis, or HIV/AIDS
- Blind or low vision
- Cancer
- Cardiovascular or heart disease
- Celiac disease
- Cerebral palsy
- Deaf or hard of hearing
- Depression or anxiety
- Diabetes
- Epilepsy
- Gastrointestinal disorders, for example, Crohn's Disease, or irritable bowel syndrome
- Intellectual disability
- Missing limbs or partially missing limbs
- Nervous system condition for example, migraine headaches, Parkinson's disease, or Multiple sclerosis (MS)
- Psychiatric condition, for example, bipolar disorder, schizophrenia, PTSD, or major depression

Please check one of the boxes below:

☐ Yes, I Have A Disability, Or Have A History/Record Of Having A Disability

☐ No, I Don't Have A Disability, Or A History/Record Of Having A Disability

☐ I Don't Wish To Answer

PUBLIC BURDEN STATEMENT: According to the Paperwork Reduction Act of 1995 no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. This survey should take about 5 minutes to complete.

Submit

Image Highlights, PeopleSoft HCM Update Image 17: Updating Disability and Veteran Status in the Fluid User Interface

Image Highlights, PeopleSoft HCM Update Image 35: Voluntary Self-Identification of Disability Form

PeopleSoft uses the Text Catalog to deliver the page with the same verbiage and layout as the current OFCCP Form CC-305. Administrators change the text as necessary if OFCCP makes changes to the verbiage.

When the employee submits the self-service Voluntary Self-Identification of Disability page, the system tracks and stores the data (employee's name, user ID, date of submission, and response regarding disability) in the Section 503 Disability group box on the "Disability Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce) in the Personal Information - Disability component.

Note: The Voluntary Self-Identification of Disability page is always blank when opened, even if the employee previously entered and saved information. Administrators can view previously entered disability information for an employee by accessing the employee's Disability page (HR_DISABILITY) and clicking the View History link to display the Disability History page (DISABILITY_USA_SEC).

Name, **Employe ID**, and **Date**	The system displays the employee's name, identification number, and the current date.

How do you know if you have a disability?

Please check one of the boxes below	Select one disabled value option. One must be selected. All options are blank by default, unless the employee or administrator has previously entered disability data, in which case that data appears.

Veteran Status Page

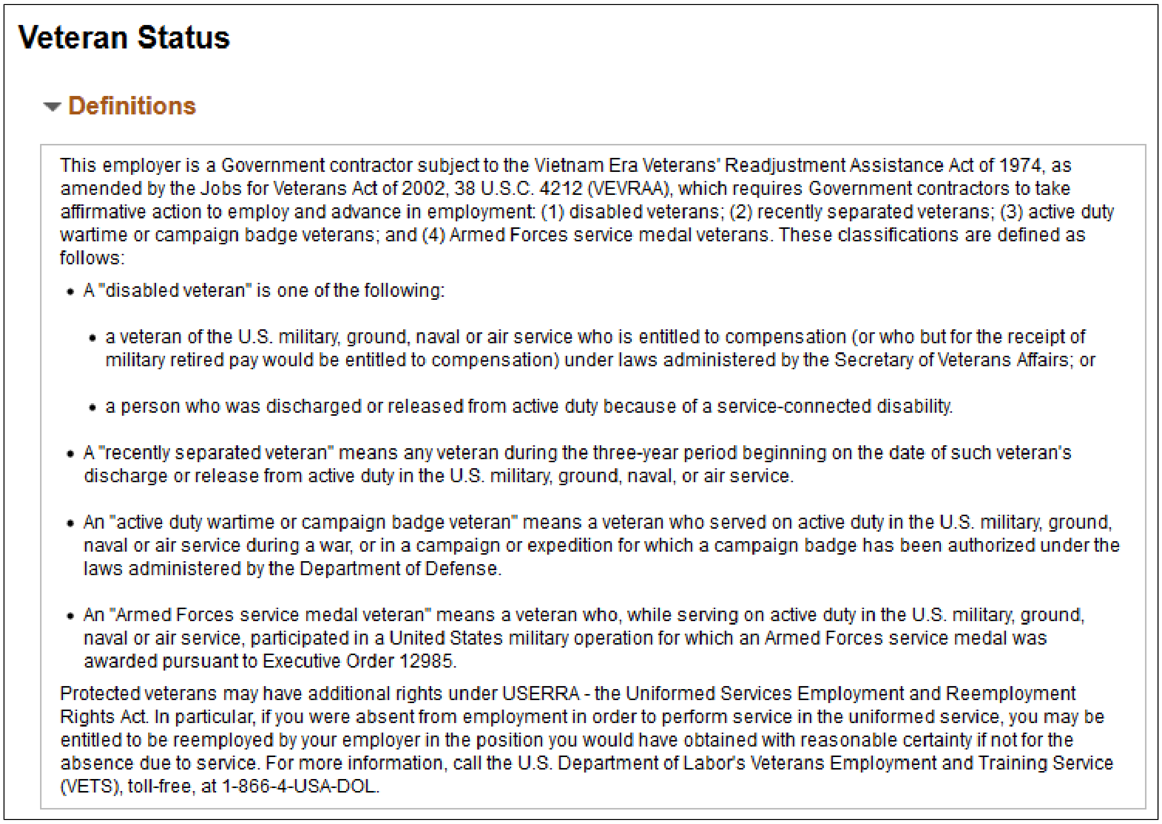
Use the Veteran Status page (HR_VET_STATUS_FL) to enter and update self-identification veteran information.

Navigation

Select the Personal Details tile on a PeopleSoft Fluid *Employee Self Service* home page, then select the Veteran Status tab or tile on the Personal Details page.

Image: Veteran Status page

This example illustrates the Veteran Status page (1 of 2).



Veteran Status

Definitions

This employer is a Government contractor subject to the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended by the Jobs for Veterans Act of 2002, 38 U.S.C. 4212 (VEVRAA), which requires Government contractors to take affirmative action to employ and advance in employment: (1) disabled veterans; (2) recently separated veterans; (3) active duty wartime or campaign badge veterans; and (4) Armed Forces service medal veterans. These classifications are defined as follows:

- A "disabled veteran" is one of the following:
  - a veteran of the U.S. military, ground, naval or air service who is entitled to compensation (or who but for the receipt of military retired pay would be entitled to compensation) under laws administered by the Secretary of Veterans Affairs; or
  - a person who was discharged or released from active duty because of a service-connected disability.
- A "recently separated veteran" means any veteran during the three-year period beginning on the date of such veteran's discharge or release from active duty in the U.S. military, ground, naval, or air service.
- An "active duty wartime or campaign badge veteran" means a veteran who served on active duty in the U.S. military, ground, naval or air service during a war, or in a campaign or expedition for which a campaign badge has been authorized under the laws administered by the Department of Defense.
- An "Armed Forces service medal veteran" means a veteran who, while serving on active duty in the U.S. military, ground, naval or air service, participated in a United States military operation for which an Armed Forces service medal was awarded pursuant to Executive Order 12985.

Protected veterans may have additional rights under USERRA - the Uniformed Services Employment and Reemployment Rights Act. In particular, if you were absent from employment in order to perform service in the uniformed service, you may be entitled to be reemployed by your employer in the position you would have obtained with reasonable certainty if not for the absence due to service. For more information, call the U.S. Department of Labor's Veterans Employment and Training Service (VETS), toll-free, at 1-866-4-USA-DOL.

Image: Veteran Status page (2 of 2)

This example illustrates the Veteran Status page (2 of 2).

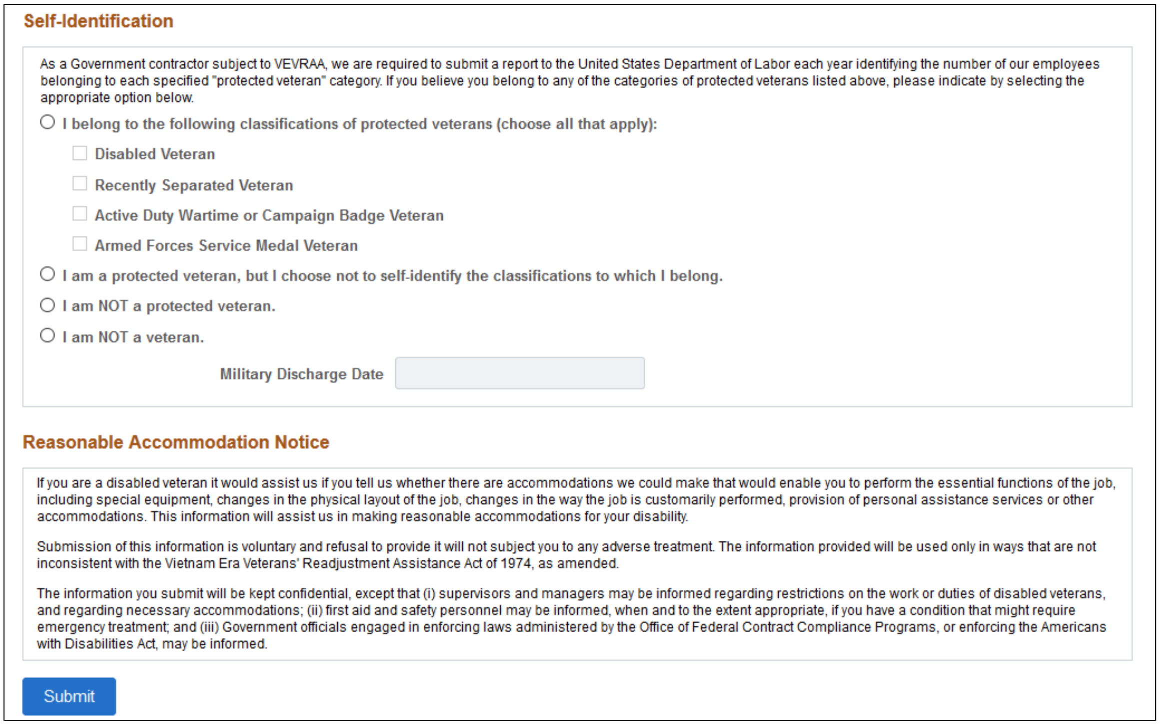


Image Highlights, PeopleSoft HCM Update Image 17: Updating Disability and Veteran Status in the Fluid User Interface

For field descriptions, see the classic self-service "Veteran Status Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce) (HR_DISABILITY) in your PeopleSoft HCM Workforce Data Management, *Human Resources Administer Workforce* documentation.

(USA) Form I-9 Page

Use the Form I-9 page (HR_I9_EE_FL) to access the I-9 instructions PDF, to access the Form I-9 page (HR_I9_EE) where you enter personal employee eligibility information, and to review the date on which you submitted your Form I-9,

Navigation

Select the Personal Details tile on a PeopleSoft Fluid *Employee Self Service* home page, then select the Form I-9 tab or tile on the Personal Details page.

Note: The Personal Details Tile tile will display the *Action Required* message when an employee working in the U.S. needs to submit I-9 form information.

Image: Form I-9 page

This example illustrates the Form I-9 page.

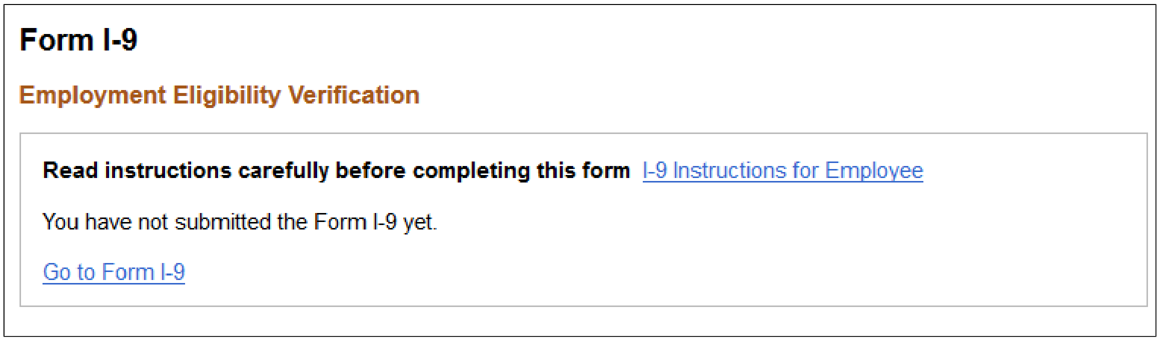


Image Highlights, PeopleSoft HCM Update Image 17: Updating Disability and Veteran Status in the Fluid User Interface

Image Highlights, PeopleSoft HCM Update Image 34: Form I-9 2020 Updates for USA

For field definitions, see the "Employment Eligibility Verification Page, Section 1" (PeopleSoft HCM 9.2: Human Resources Administer Workforce) (HR_I9_EE) documentation.

(USF) Requesting Leave of Absences

This topic lists the page that is used to request leave of absences.

Page Used to Request Leave of Absences

Page Name	***Definition Name***	***Usage***
Federal Request for Leave Page	FG_EE_LEAVE_REQ	Enter a request for leave of absence.

(USF) Requesting Termination

This topic lists the page that is used to request termination.

Page Used to Request Termination

Page Name	***Definition Name***	***Usage***
Federal Termination Request Page	FG_EE_TERMINATION	Federal employees enter a request for termination.

(USF) Reviewing Change Requests

This topic lists the page that is used to review change requests.

Page Used to Review Change Requests

Page Name	*Definition Name*	*Usage*
Select a Request Page	FE_EE_CHG_REQ_STAT	Select a change request to review.

Reviewing Workflow Inquiries

These topics provide an overview of workflow inquiries and list the pages that are used to review self-service activity.

Pages Used to Review Self-Service Activity

Page Name	*Definition Name*	*Usage*
Workflow Inquiry Page	WF_SS_STAGED	Review submitted requests and correct errors and warnings.
Workflow Inquiry Page	FE_SS_STAGED	(USF) Review submitted requests and correct errors and warnings.
Transaction Errors/Warning Page	FE_JOB_ERR_WRN_ALL	Review error and warning messages.

Understanding Workflow Inquiries

The Workflow Inquiry page enables the self-service administrator to:

- Review the status of any self-service transaction, except phone number changes.
- Review errors and warnings that occurred during the component interface processing.
- Change the workflow status of a transaction.

Reviewing the Status

Workflow Inquiry enables the self-service administrator to review a transaction for any employee for whom the self-service administrator has security. The self-service administrator searches by transaction name, request date, workflow status, or employee ID.

Reviewing Errors and Warnings

The Workflow Inquiry enables the self-service administrator to review errors or warnings that occur during the processing of the component interface. The self-service administrator must process the request using the Workflow Inquiry page.

Errors can occur when:

- The email or worklist notification fails to be generated.
- The system tried to route the transaction to the next reviewer in the approval process, but could not find that person. This means a problem occurred in the reporting structure based on what was entered in the Route To field on the Define Steps page.

If a warning occurs, the self-service administrator can be notified if the Notify on CI Warning check box is selected on the Defaults / Admin page. Warnings don't stop the tables from being updated.

Related Links

"Configuring Self-Service Transactions" (PeopleSoft HCM 9.2: Application Fundamentals)

Chapter 4

Employee Self Service Resignation and Retirement

Using the PeopleSoft Fluid Interface to Manage Resignation and Retirement Requests

PeopleSoft HCM enables employees to initiate Resignation or Retirement from single or multiple jobs through Employee Self Service. Managers and HR Administrators can review and approve employee resignation/retirement requests through Fluid Approvals.

This topic discusses the following:

- Setting up Transaction Configuration for Resignation and Retirement
- Submitting Resignation Requests
- Approving Resignation Requests
- Submitting Retirement Requests
- Approving Retirement Requests

Submitting Resignation Requests

This topic gives an overview of initiating resignation requests by an employee.

Pages Used to Submit Resignation Request

Page Name	***Definition Name***	***Usage***
Resignation page	HR_ESS_RESGN_FL	To submit resignation request for a single or multiple jobs.

Resignation Page

Use the Resignation page (HR_ESS_RESGN_FL) to submit resignation request for a single or multiple jobs.

Navigation

Click the Personal Details tile on Employee Self Service home page. Click Related Action button available on the Personal Details page.

Select Job, Submit Resignation.

Image: Resignation page — Employee having single job

This example illustrates the fields and controls on the Resignation page for an employee having single job.

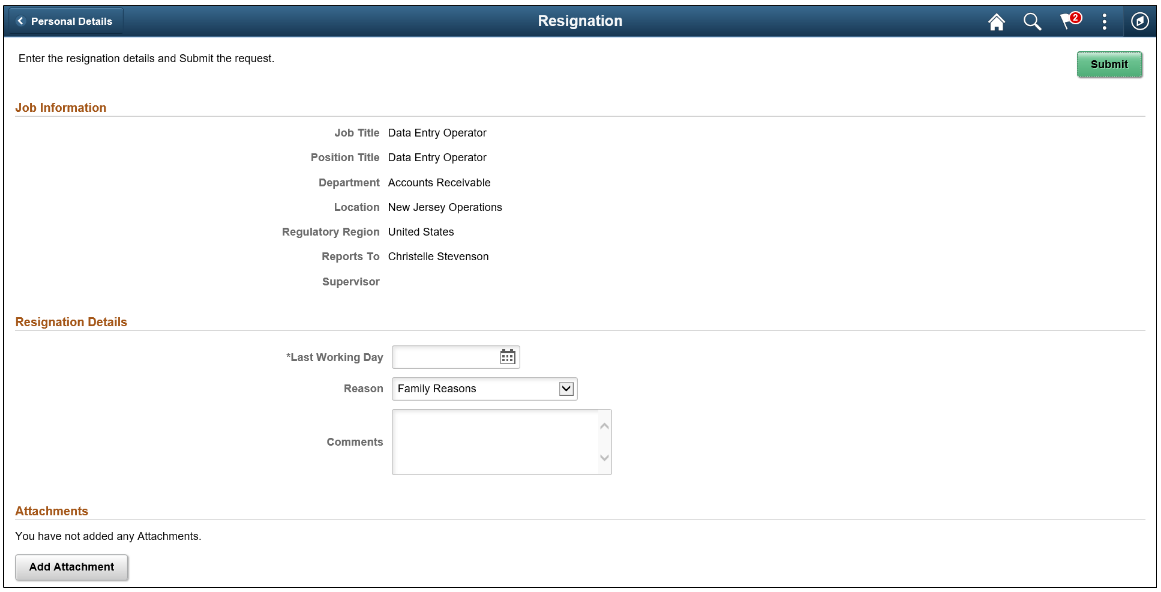
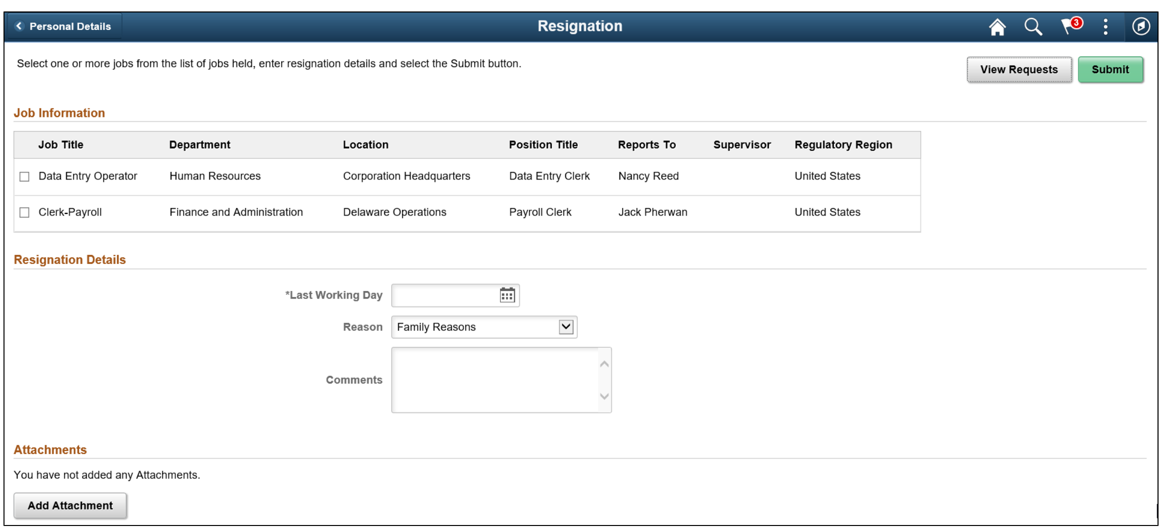


Image: Resignation page — Employee having multiple jobs

This example illustrates the fields and controls on the Resignation page for an employee having multiple jobs.



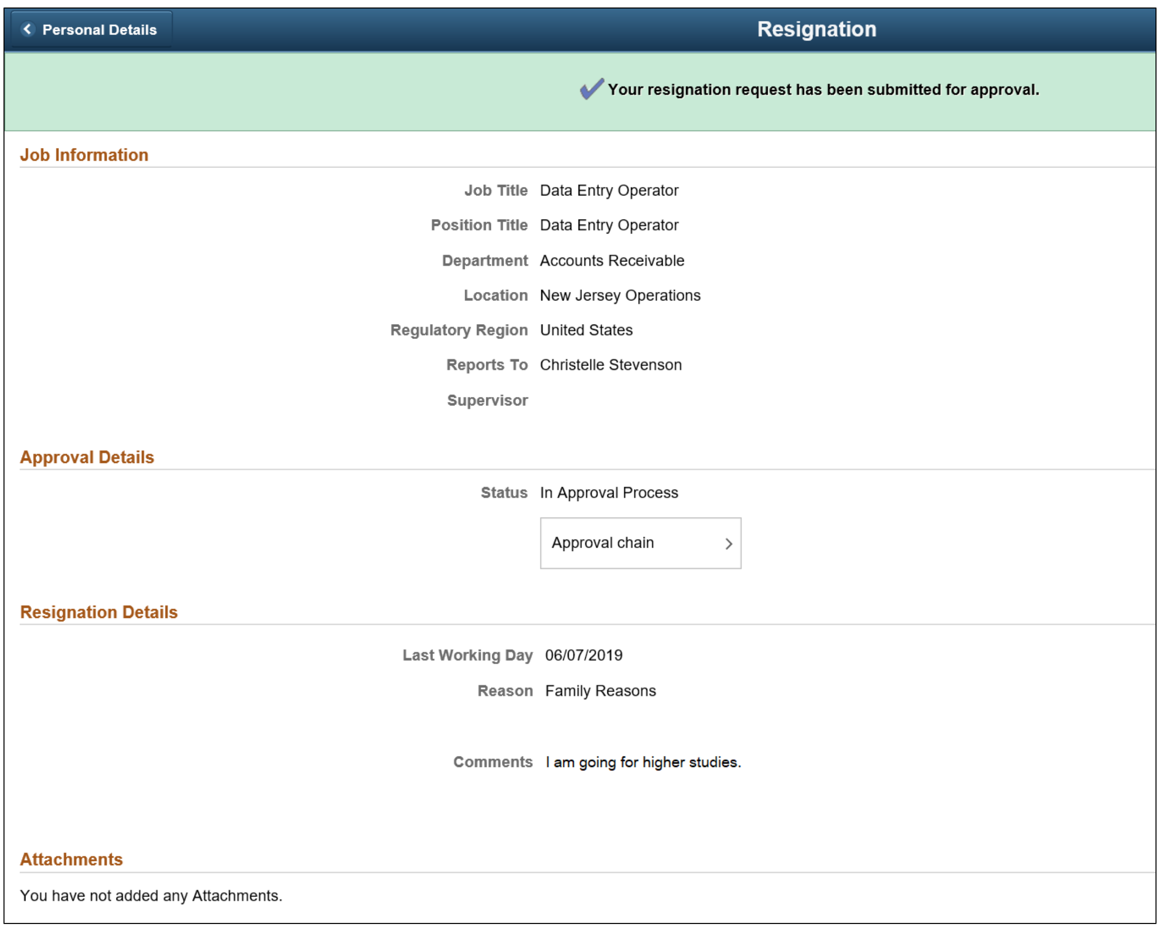
Last Working Day	Select the last working day from the calendar.
Reason	Select the reason for resignation.

Comments	Enter additional remarks of resignation, if any.
Add Attachment	Upload any supporting documents, for example, Letter of Resignation.
View Requests	You can view the requests already submitted. This button is enabled only when an employee have any submitted record.

Select the check box corresponding to the required job roles you want to resign. Click Submit button to submit the resignation request to the manager for approval. The Resignation Request Confirmation page is displayed as shown.

Image: Resignation Request Confirmation page for a Single Job

This example illustrates the Resignation Request Confirmation page when an employee submits a request for a single job.



Click Approval Chain to view the information about approvers associated with the request and approval status.

An employee having multiple jobs can resign from all of his jobs at once. Select the jobs for which you need to submit resignation requests. Enter the last working day and provide remarks, if any. Click Submit. This displays the Resignation Confirmation page as shown.

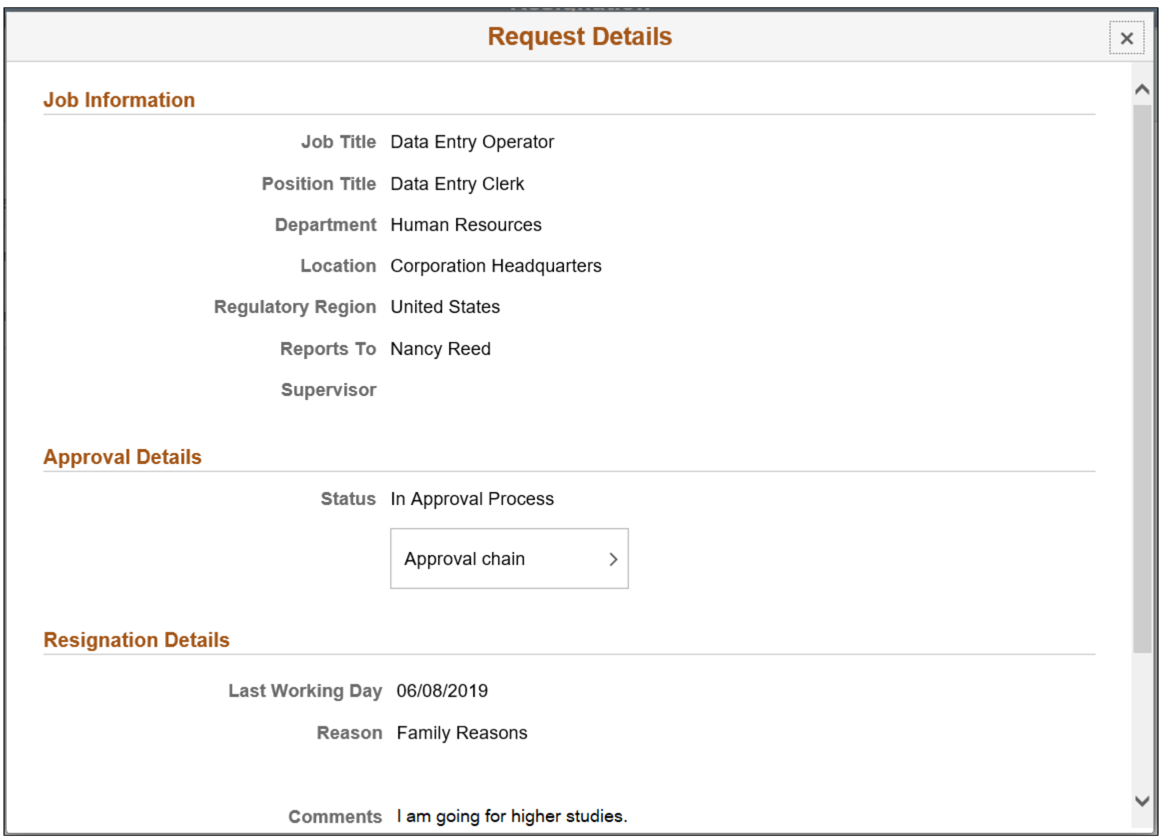
Image: Resignation Request Confirmation page for Multiple Jobs

This example illustrates the Resignation Request Confirmation page for an employee who has submitted request for multiple jobs at once.

Select a request to view the details. This displays the Request Details modal window as shown.

Image: Request Details modal window

This example illustrates the Request Details modal window.



Approving Resignation Requests

The resignation request initiated by an employee is submitted to managers for approval. Managers can approve, deny, or push back the request. The approved requests by the manager are routed to HR administrator for approval.

Pages Used to Approve Resignation Requests

Page Name	*Definition Name*	*Usage*
Pending Approvals page	EOAWMA_MAIN_FL	To view different resignation requests submitted by employees.
Employee Resignation Page	EOAWMA_TXNHDTL_FL	To approve, deny or pushback the resignation request.

Pending Approvals Page

Use the Pending Approvals page (EOAWMA_MAIN_FL) to view different resignation requests submitted by employees.

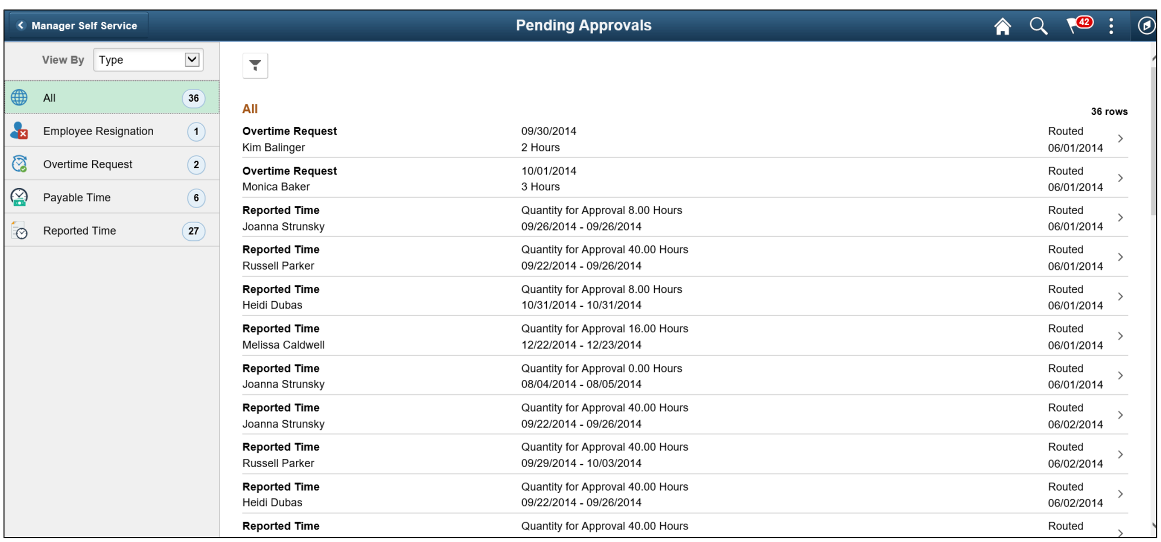
Navigation

Click the Approvals tile on the Manager Self Service home page.

You can also access Pending Approvals page by clicking Push Notifications button.

Image: Pending Approvals page

This example illustrates the Pending Approvals page for a manager.



Filter the resignation request submitted by the employee.

Employee Resignation Page

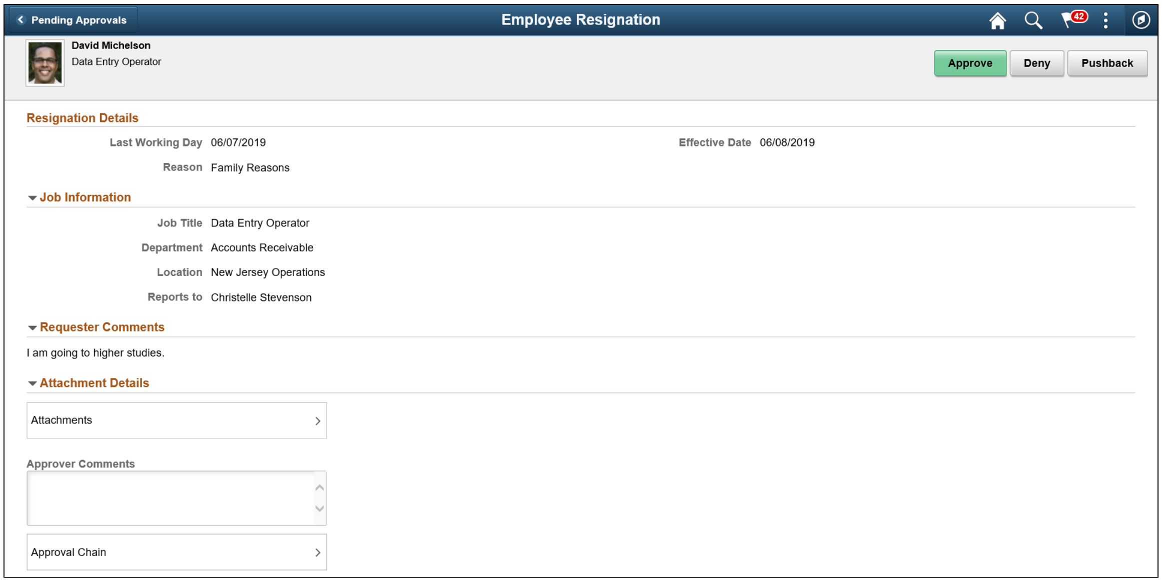
Use the Employee Resignation page (EOAWMA_TXNHDTL_FL) to approve, deny or pushback the resignation request.

Navigation

Click the Employee Resignation request on Pending Approvals page.

Image: Employee Resignation page for a Manager

This example illustrates the Employee Resignation page while logging in as a Manager.



To approve resignation request as a manager, perform the following:

1. Login as manager.
2. Access the Pending Approvals page.
3. Filter the Employee Resignation request.
4. Click the request. This displays the Employee Resignation page for a manager as shown above.

   Click Approve. This displays the Approve modal window.

   Note: Managers can also deny or pushback the request. In this case, employee gets notified and you need to update the required details and resubmit the request.

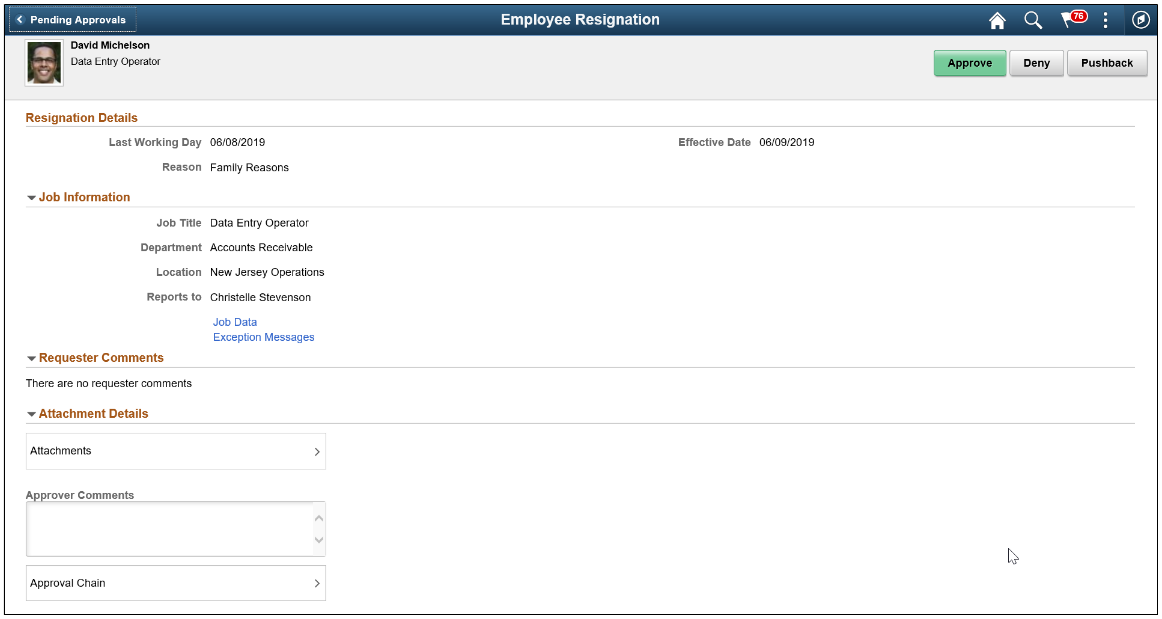
5. Enter your comments and click Submit. The request is then routed to HR Administrator for approval. HR Administrator can approve, deny, or pushback the resignation requests approved by the manager.

To approve the resignation request as a HR administrator, perform the following:

1. Login as HR Administrator.
2. Access the Pending Approvals page.
3. Filter the Employee Resignation request.
4. Click the request. This displays the Employee Resignation page as shown:

Image: Employee Resignation page

This example illustrates the Employee Resignation page for a HR Administrator.



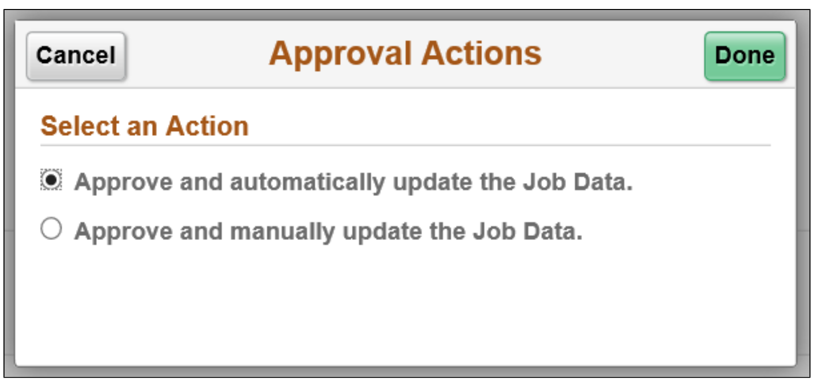
5. Click Job data link to view employee job data.

6. Click Exception Messages link to view the errors encountered while saving the transaction details.

7. Click Approve button. The Approval Actions modal window is displayed as shown.

Image: Approval Actions Modal Window

This example illustrates Approval Actions modal window.



Note: HR administrators can also deny or pushback the request. In this case, employee gets notified and you need to update the required details and resubmit the request.

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8. Select the required option to update employee's job data manually or automatically and click Done.

9. Provide your comments in the Approve modal window and click Submit.

Submitting Retirement Requests

This topic gives an overview of initiating retirement request by an employee.

Pages Used to Submit Retirement Request

Page Name	***Definition Name***	***Usage***
Retirement page	HR_ESS_RETIRE_FL	To submit retirement request for a single or multiple jobs.

Retirement Page

Use the Retirement page (HR_ESS_RETIRE_FL) to submit retirement request for single or multiple jobs.

Navigation

Click the Personal Details tile on Employee Self Service home page. Click Related Action button available on the Personal Details page.

Select Job, Submit Retirement.

Image: Retirement page — Employee having single job

This example illustrates the fields and controls on the Retirement page for an employee having single job.

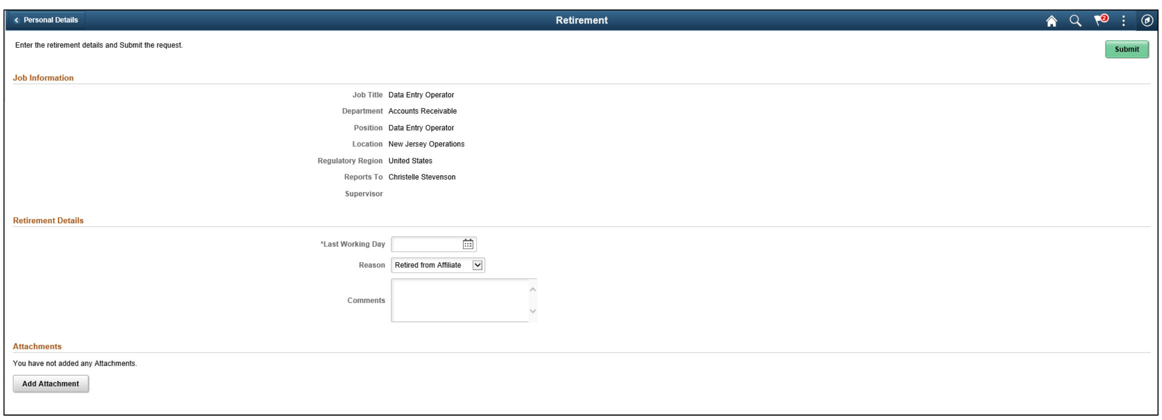
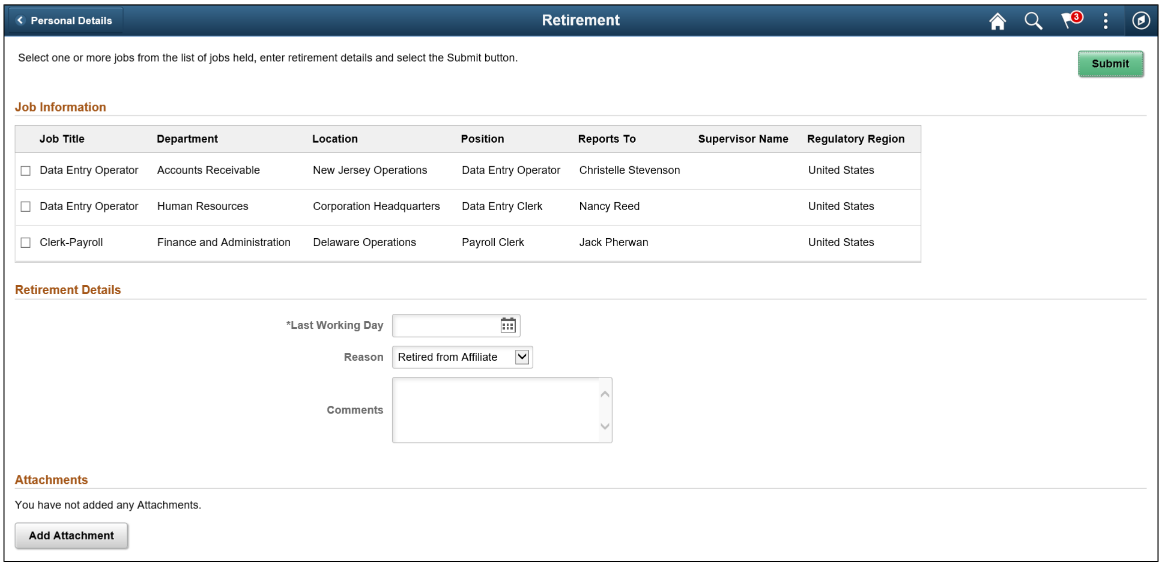


Image: Retirement page — Employee having multiple jobs

This example illustrates the fields and controls on the Retirement page for an employee having multiple jobs.



Last Working Day Select the last working day from the calendar.

Reason Select the reason for retirement.

Comments Enter additional remarks of retirement, if any.

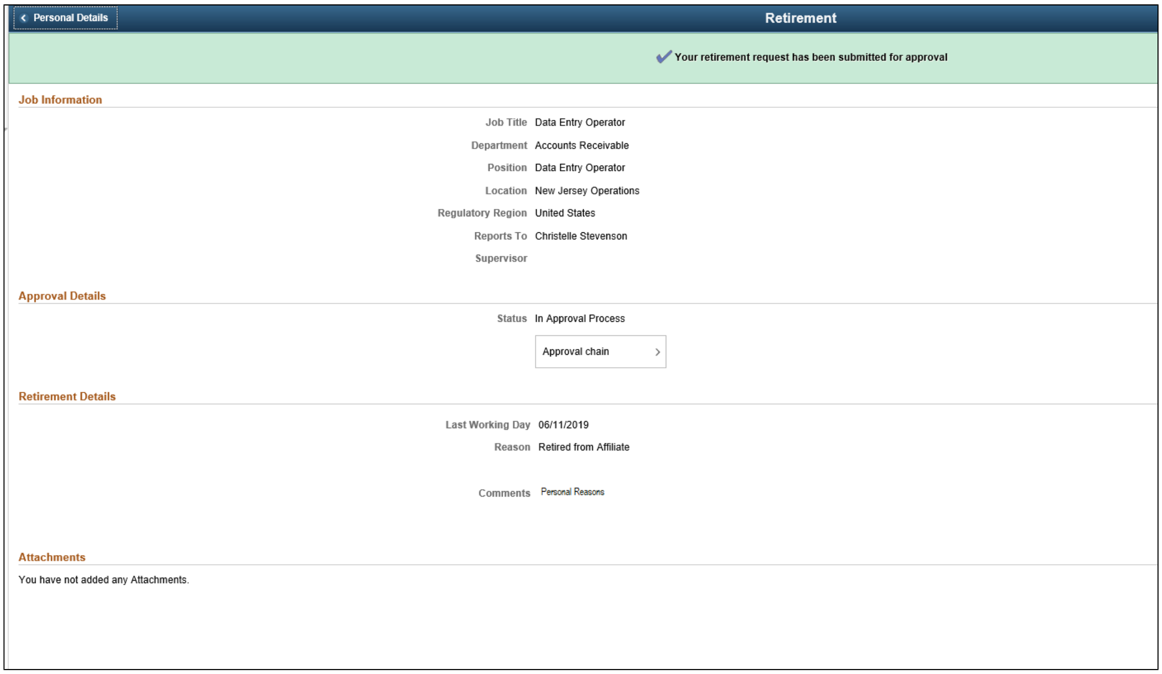
Add Attachment Upload any supporting documents.

View Requests You can view the requests already submitted. This button is enabled only when an employee have any submitted record.

Select the check box corresponding to the required job roles you want to retire. Click Submit button to submit the Retirement request to the manager for approval. The Retirement Request Confirmation page is displayed as shown.

Image: Retirement Request Confirmation page — Single Job

This example illustrates the Retirement Request Confirmation page when an employee submits a retirement request for a single job .

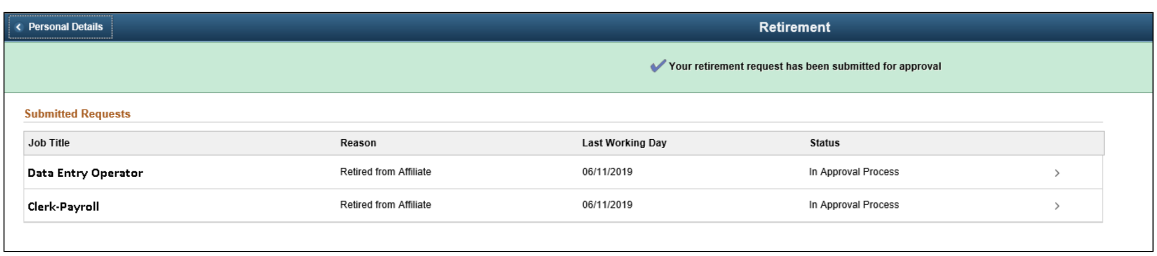


Click Approval Chain to view the information about approvers associated with the request and approval status.

An employee having multiple jobs can resign from all of his jobs at once. Select the jobs for which you need to submit retirement requests. Enter the last working day and provide remarks, if any. Click Submit. This displays the Retirement Request Confirmation page as shown.

Image: Retirement page for Multiple Jobs Employee

This example illustrates the Retirement Request Confirmation page when an employee submits a retirement request for multiple jobs at once.



Approving Retirement Requests

The retirement request initiated by an employee is submitted to managers for approval. Managers can approve, deny, or push back the request. The approved request is routed to HR administrator for approval.

Pages Used to Approve Retirement Requests

Page Name	***Definition Name***	***Usage***
Pending Approvals page	EOAWMA_MAIN_FL	To view different retirement requests submitted by employees.
Employee Retirement Page	EOAWMA_TXNHDTL_FL	To approve, deny or pushback the retirement request.

Pending Approvals Page

Use the Pending Approvals page (EOAWMA_MAIN_FL) to view different retirement requests submitted by employees.

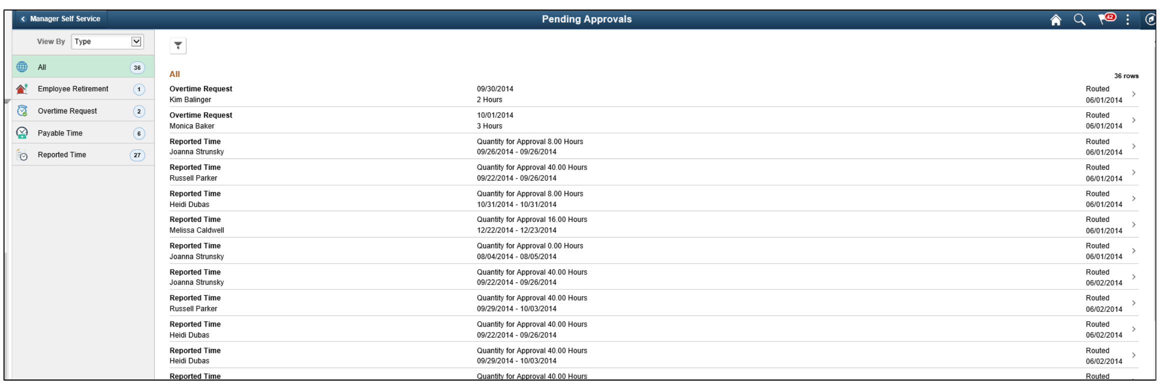
Navigation

Click the Approvals tile on the Manager Self Service home page.

You can also access Pending Approvals page by clicking Push Notifications button.

Image: Pending Approvals page

This example illustrates the Pending Approvals page for a manager.



Filter the retirement request submitted by the employee.

Employee Retirement Page

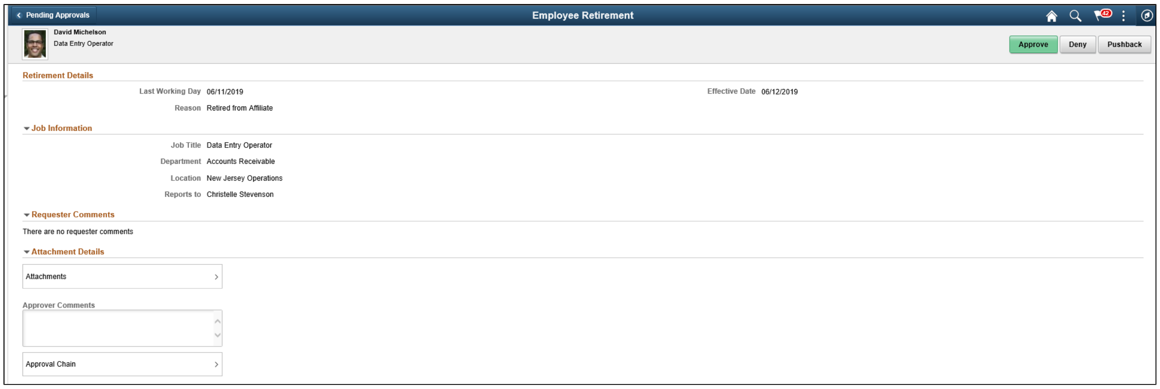
Use the Employee Resignation page (EOAWMA_TXNHDTL_FL) to approve, deny or pushback the retirement request.

Navigation

Click the Employee Retirement request on Pending Approvals page.

Image: Employee Retirement Page

This example illustrates the Employee Retirement page while logging in as a Manager.



To approve retirement request as a manager, perform the following:

1. Login as manager.
2. Access the Pending Approvals page.
3. Filter the Employee Retirement request.
4. Click the request you want to approve. This displays the Employee Retirement page as shown above.
5. Click Approve. This displays the Approve modal window.

    Note: Managers can also deny or pushback the request. In this case, employee gets notified and need to update the required details and resubmit the request.

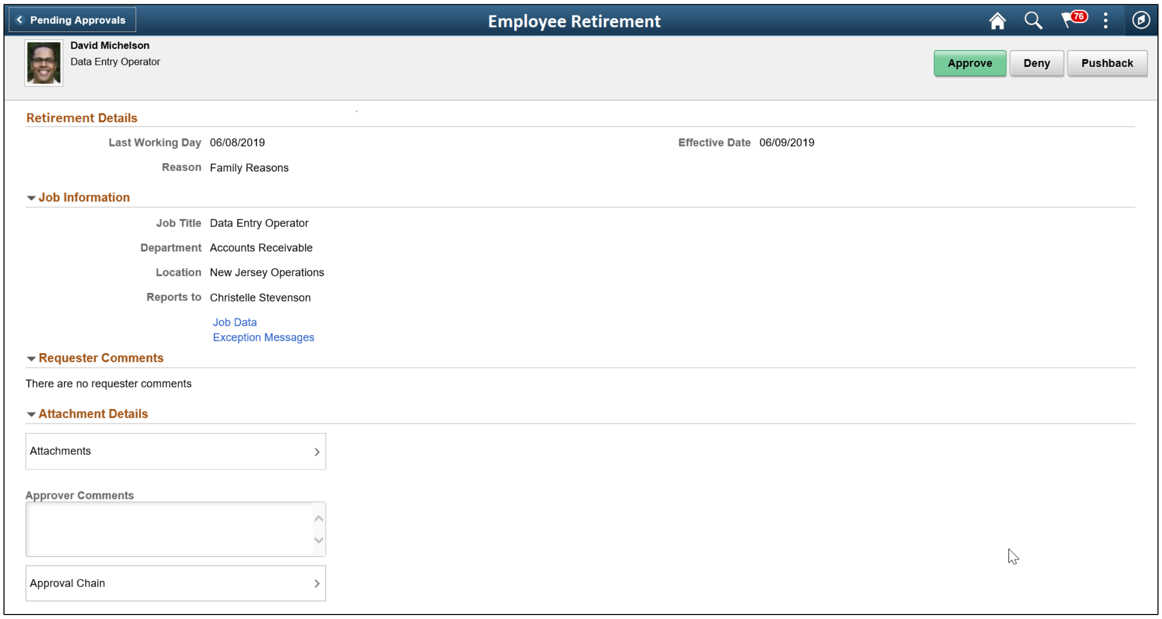
6. Enter your comments and click Submit. The request is then routed to HR Administrator for approval. HR Administrator can approve, deny, or pushback the resignation requests approved by the manager.

To approve the resignation request as a HR administrator, perform the following:

1. Login as HR Administrator.
2. Access the Pending Approvals page.
3. Filter the Employee Retirement request.
4. Click the request you want to approve. This displays the Employee Retirement page as shown:

Image: Employee Retirement page

This example illustrates the fields and controls on the Employee Retirement page.



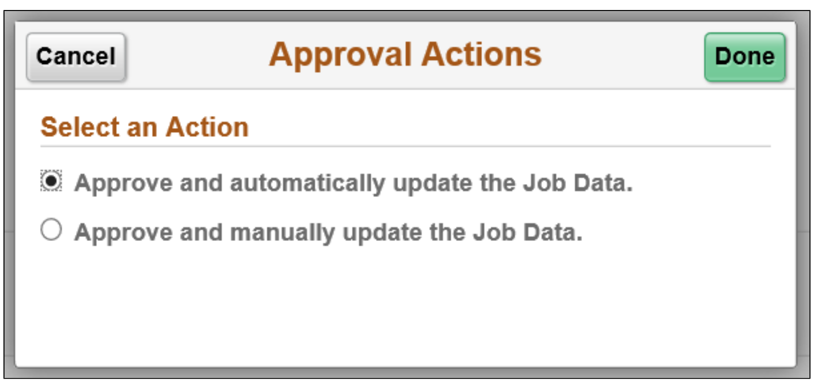
5. Click Job data link to view employee job data.

6. Click Exception Messages link to view the errors encountered while saving the transaction details.

7. Click Approve button. The Approval Actions modal window is displayed as shown.

   Image: Approval Actions Modal Window

   This example illustrates the Approval Actions modal window.



Note: HR administrators can also deny or pushback the request. In this case, employee gets notified and need to update the required details and resubmit the request.

---

8. Select the required option to update employee's job data manually or automatically and click Done.

9. Provide your comments in the Approve modal window and click Submit.

Image: Approve Modal Window

This example illustrates the Approve modal window.

Setting up Transaction Configuration for Resignation and Retirement

This topic discusses the transaction configuration set up of retirement or resignation.

Page Used to Set up Transaction Configuration for Resignation and Retirement

Page Name	***Definition Name***	***Usage***
Transaction Configuration page	HR_ESS_CT_CFG	To setup Employee Self Service Termination or Retirement feature.

Transaction Configuration Page

Use the Transaction Configuration page (HR_ESS_CT_CFG) to setup Employee Self Service Termination or Retirement feature.

Navigation

Set Up HCM > Common Definitions > Self Service >Transaction Configuration

Image: Transaction Configuration Page — Resignation

This example illustrates the fields and controls on the Transaction Configuration page for Resignation.

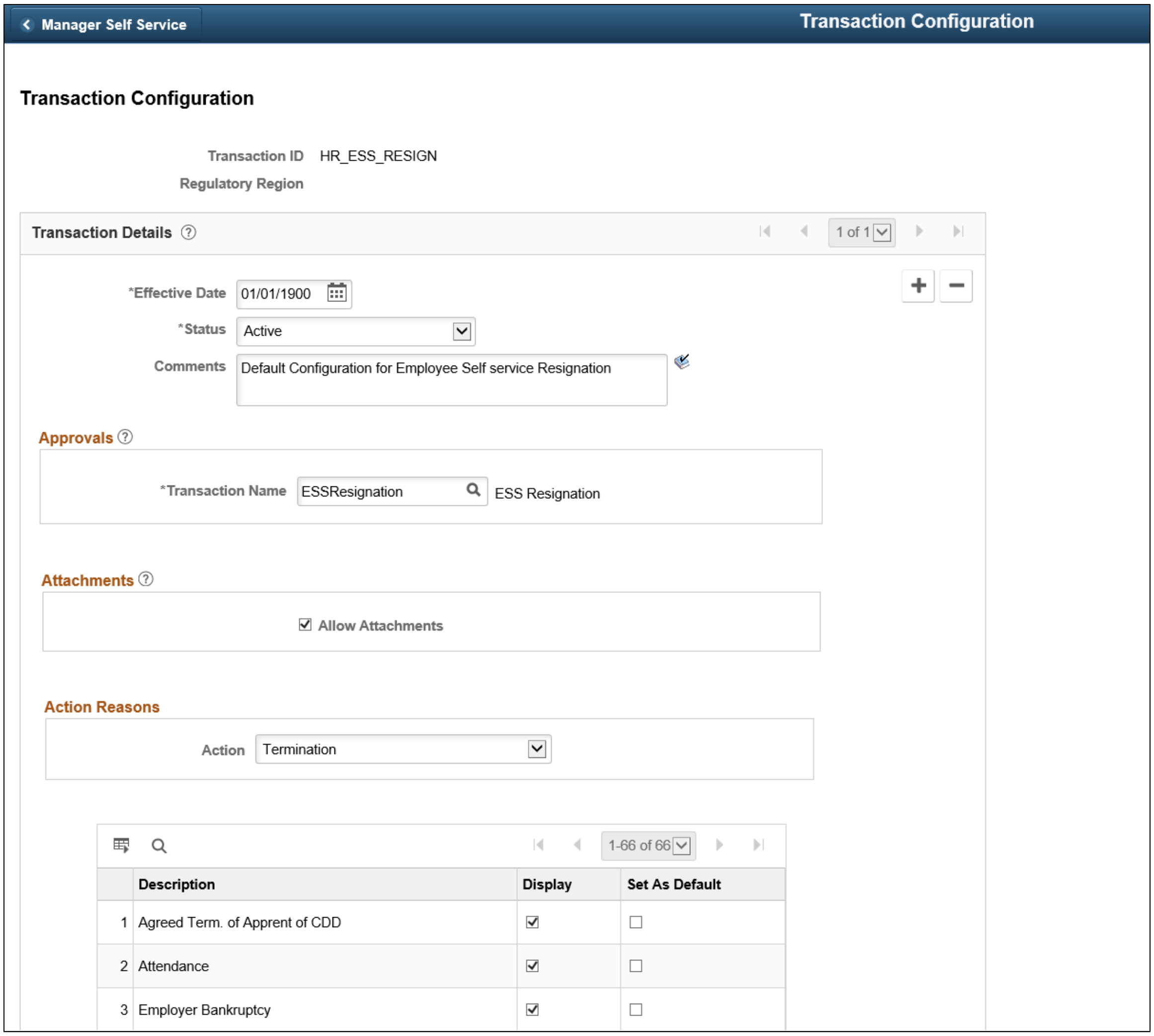
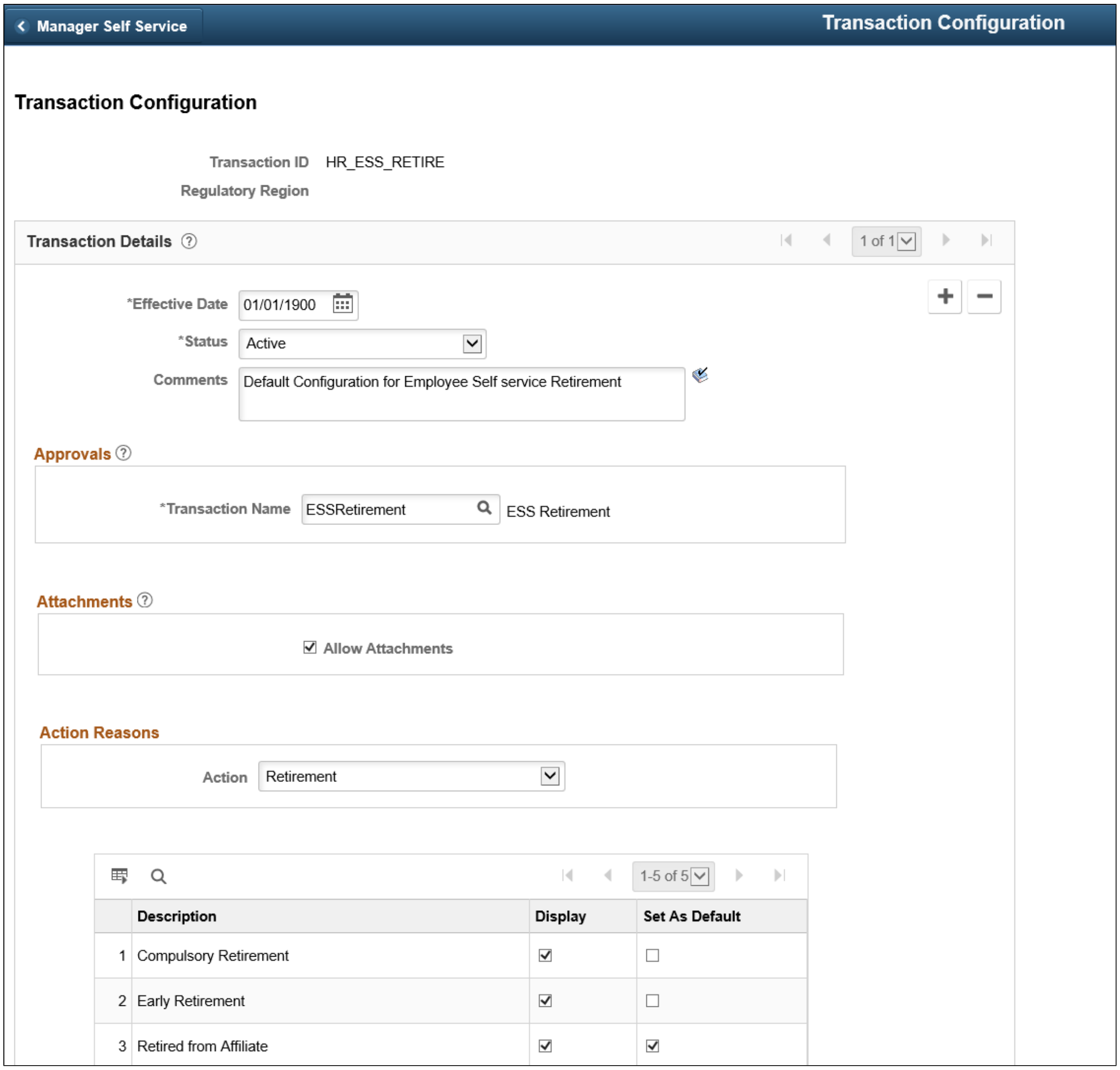


Image: Transaction Configuration Page — Retirement

This example illustrates the fields and controls on the Transaction Configuration page for Retirement.



Transaction ID

Unique identifier of the transaction. For resignation, the field displays the value 'HR_ESS_RESIGN" and for retirement, the value 'HR_ESS_RETIRE' is displayed.

Regulatory Region

Regulatory region of the job.

If the employee holds Single Job or multiple jobs where all the jobs have same regulatory region, the Resignation or Retirement page will be displayed as per the Regulatory region of the job. If the employee holds Multiple Job with each jobs having different Regulatory Region, the Resignation or Retirement page is displayed as per the default setup. When the Setup is not configured for Regulatory region of the logged in employee, the Resignation or Retirement page is displayed as per the default setup.

Note: Default Setup has empty value for Regulatory Region. If the default setup is not configured in the environment, the transaction get aborted with an error message as “This transaction is not configured for your regulatory region. Please contact your Human Resources administrator”.

Effective Date	Date from which the configuration setup is effective.
Status	Select ‘Active’, if you want to make the configuration active. Select ‘Inactive’, if you want to make the configuration inactive.
Comments	Remarks for the transaction.
Transaction Name	Displays ESSResignation for resignation setup and ESSRetirement for retirement feature setup.
Allow Attachments	Select the check box if you want to display the Attachment button in the Resignation or Retirement page.
Action	Select ‘Termination’ to setup Employee Self Service Termination feature. Select ‘Retirement’ to setup Employee Self Service Retirement feature.

Select the check box under Display field to display the actions on the Reason drop-down list of Resignation or Retirement page.

Select the check box under Set as Default field to set the default value in the Reason drop-down list in Resignation or Retirement page.

