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PeopleSoft

# PeopleSoft HCM 9.2: PeopleSoft eProfile

**May 2024**

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# Contents

# Preface

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## 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 PeopleSoft Online Help

If you're setting up an on-premises 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. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the Oracle Software Delivery Cloud.

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, 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.<br><br>Ampersands also precede all PeopleCode variables. |

| *Typographical Convention* | *Description* |
|---|---|
| ⇒ | 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.

# PeopleSoft HCM Related Links

Oracle Help Center

PeopleSoft Online Help Home

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

HCM Abbreviations

PeopleSoft Spotlight Series

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Please include the applications update image or PeopleTools release that you're using.

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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" (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" (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.

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:
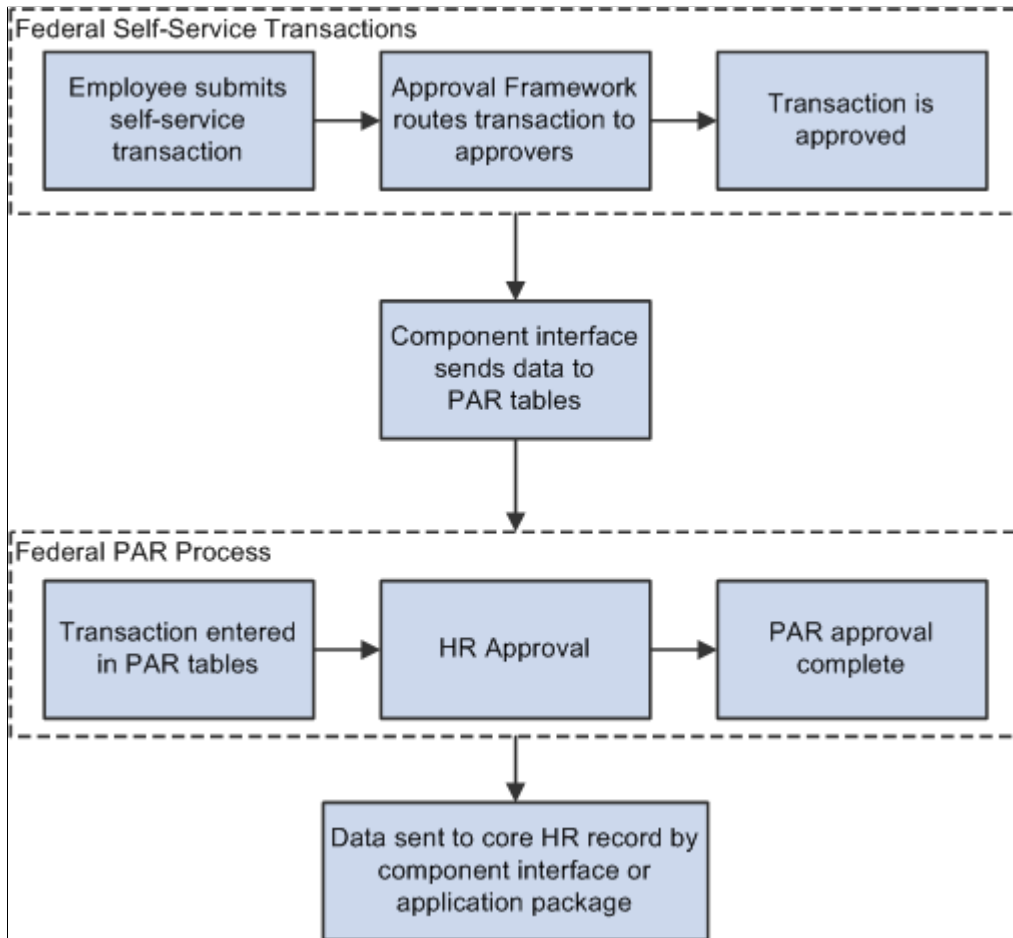


## Delivered Approval Flows

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 Transaction setup (GVT_WIP_RECORD) and Approval Flow Setup USF (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.<br><br>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.

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**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.

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## 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 Transaction setup** > **Transaction Setup**

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.



| Field or Control | Description |
|---|---|
| **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

| Field or Control | Description |
|---|---|
| **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. <br><br> **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: <br><br> • *Work-in-progress:* The status is used for a request that is neither complete nor canceled. <br><br> • *Cancelled:* The status is used for a request that has been denied. <br><br> • *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 Setup USF** > **Define Steps**

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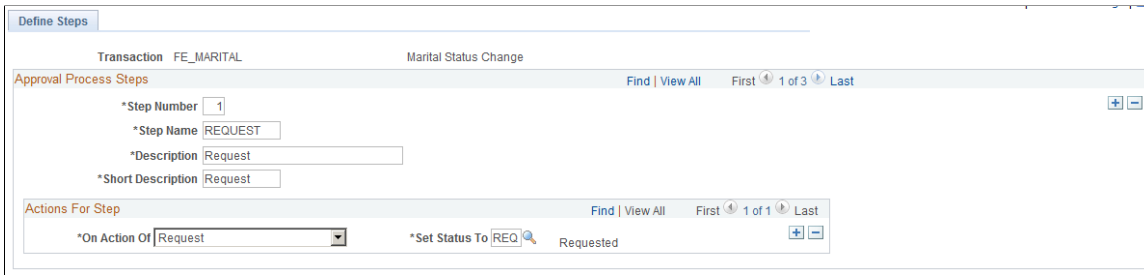


## Approval Process Steps

| Field or Control | Description |
| --- | --- |
| **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.<br><br>**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. |

| Field or Control | Description |
| --- | --- |
| **Step Name** | Enter a name for this step. The name can be up to 10 characters long. |

### Actions For Step

| Field or Control | Description |
|---|---|
| On Action Of | Add or modify the action for which you are defining a WIP status. Valid actions are *Approve, Deny,* or *Request.*<br><br>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.) |

| Field or Control | Description |
|---|---|
| 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 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 Transaction setup** > **Defaults / Admin**

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

| Field or Control | Description |
| --- | --- |
| **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. |

| Field or Control | Description |
| --- | --- |
| **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. |

| Field or Control | Description |
| --- | --- |
| **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. |

| Field or Control | Description |
| --- | --- |
| **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. |

| Field or Control | Description |
| --- | --- |
| **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. |

| Field or Control | Description |
| --- | --- |
| **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 Transaction setup (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.

**Note:** Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see "Understanding Notification Composer" (Enterprise Components).

## 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" (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 Transaction setup** > **Defaults / Admin**

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

| Field or Control | Description |
| --- | --- |
| **Administrator Role** | Select the role that you want notified when an error, warning, or success occurs. |

| Field or Control | Description |
| --- | --- |
| **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. |

| Field or Control | Description |
|---|---|
| **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. |

| Field or Control | Description |
|---|---|
| **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.

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

| Field or Control | Description |
|---|---|
| Component Interface | Select the name of the component interface process that is used for this transaction. |

| Field or Control | Description |
|---|---|
| Collection | Select the name collection that is used by the component interface process for this transaction. |

| Field or Control | Description |
|---|---|
| Record | Select the name of the record that is used by the component interface process for this transaction. |

| Field or Control | Description |
|---|---|
| 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

| Field or Control | Description |
|---|---|
| Business Process | Select the name of the business process that is triggered to send component interface notifications to the self-service administrator. |

| Field or Control | Description |
|---|---|
| Activity | Select the name of the activity that is triggered to send component interface notifications to the self-service administrator. |

| Field or Control | Description |
|---|---|
| **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" (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" (Application Fundamentals).

    See "Configuring Self-Service Transactions" (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" (Application Fundamentals) and "Understanding Data Permission Security for HCM" (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" (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" (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" (Application Fundamentals).

7. Configure the USFED WIP transaction.

See "Understanding WIP Management System Setup" (Application Fundamentals).

# (Classic) 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.

**Note:** This feature has been replaced by Personal Details in Fluid. For more information, see (Fluid) Reviewing and Updating 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" (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. <br><br> Available fields for an employee may vary by country. |
| Address Change Page | HR_HOME_MAILING | Initiate the address change request. <br><br> You can enter only current or future effective-dated address changes to avoid processing issues with benefits and payroll. |

| Page Name | Definition Name | Usage |
|---|---|---|
| Address Change - Submit Page | FE_ADDRESS_STS | Confirms that the request was submitted. |
| Disability - Voluntary Self-Identification of Disability | HR_DISABILITY | Employees use this self-service page to complete and file Form CC-305 disability data electronically.<br><br>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.<br><br>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.<br><br>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. |

| Page Name | Definition Name | Usage |
|---|---|---|
| Home and Mailing Address Page | HR_HOME_MAILING | Employees view and change home and mailing addresses in the PeopleSoft database. |
| 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. |

| Page Name | Definition Name | Usage |
|---|---|---|
| "(Employee) Employment Eligibility Verification Page, Section 1. Employee Information and Attestation" (PeopleSoft Human Resources Administer Workforce) | HR_I9_EE | Complete the Employment Eligibility Verification form (Form I-9). |

## 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.

# (Fluid) Reviewing and Updating 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 (Classic) Reviewing and Updating Personal Information.

These videos provide an overview of the PeopleSoft Fluid user interface experience and updating personal data:

Video: PeopleSoft Fluid User Interface Experience in HCM

Video: Image Highlights, PeopleSoft HCM Update Image 37: Validations and Formatting for Phone Numbers and Emails

Video: Image Highlights, PeopleSoft HCM Update Image 46: Employee Self-Service Address Configurability

Video: Image Highlights, PeopleSoft HCM Update Image 46: Remote Worker Home Address Edit

For general information about Fluid pages in PeopleSoft HCM, see "Understanding PeopleSoft Fluid User Interface Homepages" (Application Fundamentals)

## Pages Used 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. |

| Page Name | Definition Name | Usage |
|---|---|---|
| Personal Details Navigation Collection | N/A | View and update personal details within the context of a multi-panel layout.<br><br>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. |
| <Type> Address (Detail) Page | ADDRESS_DFT_SCF | Update address information and view or add attachments that may support the update. |
| 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. |
| 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. |
| Social Media (Summary) Page | HR_EE_SOC_MEDIA_FL | Review your social media accounts. |

| Page Name | Definition Name | Usage |
|---|---|---|
| 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)<br><br>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. |
| Gender Identity Page | HR_EE_GENDER_FL | View a summary of your gender identity and expression details. |
| Gender Details Page | GENDER_EDIT_SCF | View or enter gender identity and expression details. |
| 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. |
| 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, |

| Page Name | Definition Name | Usage |
|-----------|-----------------|-------|
| Employment Eligibility Verification Page, Section 1 | HR_I9_EE | Complete the employer sections (2 and 3) of the Form I-9.<br><br>See "(Employee) Employment Eligibility Verification Page, Section 1. Employee Information and Attestation" (PeopleSoft Human Resources Administer Workforce) (HR_I9_EE) and "(Employer) Employment Eligibility Verification Page, Section 2. Employer Review and Verification" (PeopleSoft 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.<br><br>See "(USA) Managing I-9 Information" (PeopleSoft Human Resources Administer Workforce) in your *Human Resources Administer Workforce* product documentation. |
| Business Partners Page | HR_EE_BUS_PRTNR_FL | View your business partners and their contact information. |
| Additional Information Page | HR_ADDTL_INFO_FL | Review miscellaneous personal information. |

## 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.

This example illustrates the Personal Details tile.
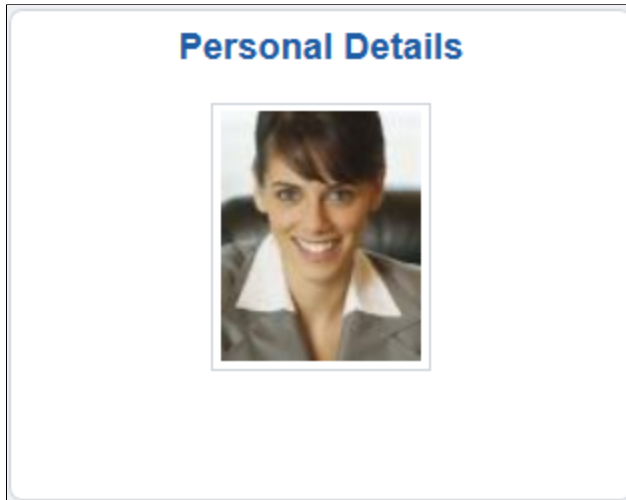


This example illustrates the Personal Details tile displaying the *Action Required* message. This message appears when an employee working in the U.S. needs to submit I-9 form information.
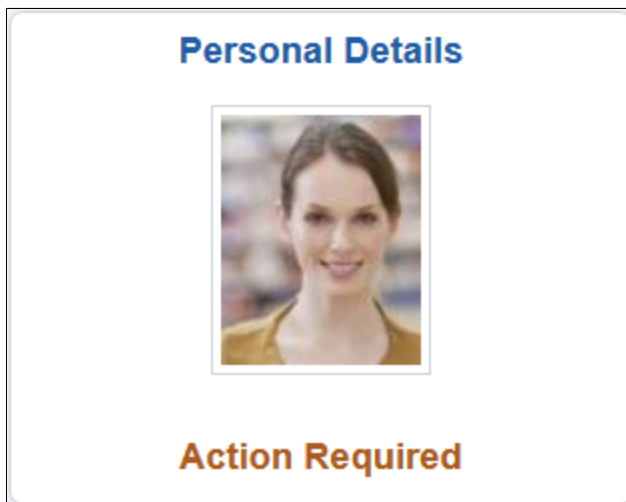


Depending upon the system setup and personal preferences, the picture may display a default photo.

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:

• Addresses (Summary) Page

• Contact Details Page

• Emergency Contacts (Summary) Page

• Social Media (Summary) Page

• Marital Status Page

• Name (Summary) Page

• Gender Identity Page (This page is not available from the navigation collection)

- Ethnic Groups Page

- Disability - Voluntary Self-Identification of Disability Page

- Veteran Status Page

- (USA) Form I-9 Page

- Business Partners Page

- Additional Information Page

When enabled, the **Update Photo** link will appear beneath the photo within the header of any of the Personal Details transaction pages and grant you access to the Select Photo 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 header (sub-banner) above the page content.

  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 appear in the sub-banner above the employee name.
—When accessing the transaction pages through the navigation collection, even though the left navigation panel is not illustrated in the examples in this topic, the navigation panel is part of the framework of the medium and large form factor pages in the system.

## Personal Details Dashboard

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

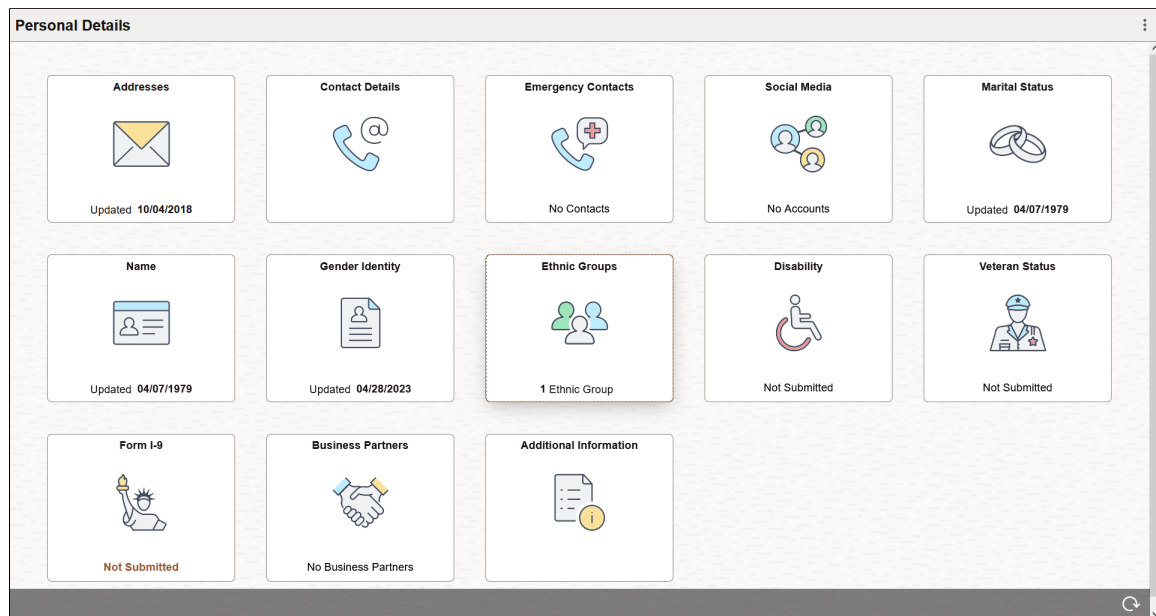Navigation:

Select the Personal Details Tile.

**Note:** The Personal Details dashboard displays 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.

This example illustrates Personal Details dashboard.



Video: 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.

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

| Addresses |
|---|

**Betty Locherty** ⌄
Finance Director
Update Photo

**Home Address**

| 343, Hill stone road<br>Buffalo, NY 74940 | Current | ⟩ |
|---|---|---|

**Mailing Address**

| 643 Robinson St<br>Buffalo, NY 74940 | Current | ⟩ |
|---|---|---|

The page layout consists of the following parts:

**Header (Sub-Banner)**

Below the banner, above the transaction content page, is the header and it includes the title of the page, 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" (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 on a PeopleSoft Fluid "Employee Self Service Homepage" (Application Fundamentals).

**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.

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.

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.
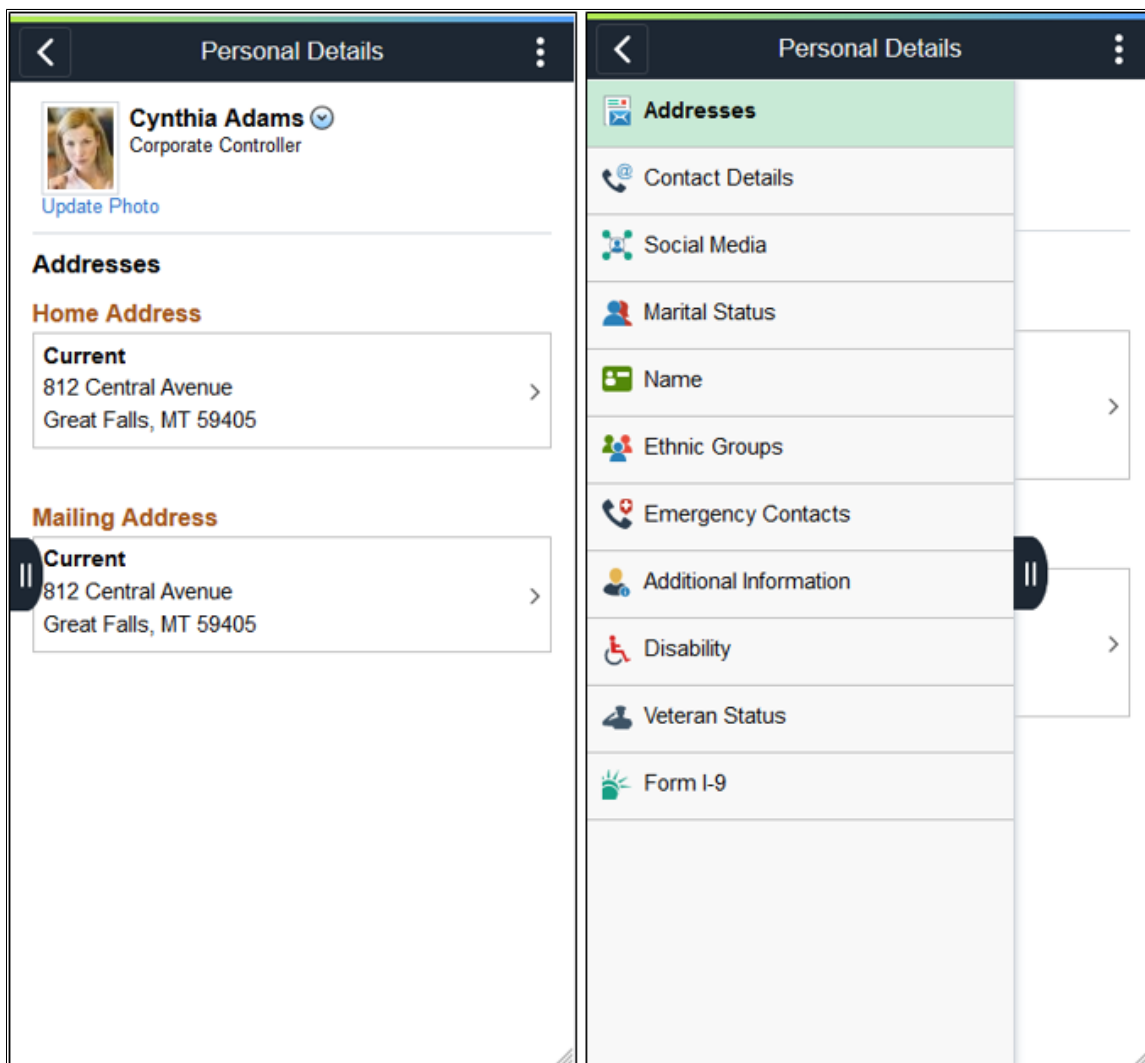


The Personal Details navigation collection page consists of the following panels and sections:

## Header (Sub-Banner)

The top panel displays the header and includes the employee's name, job title, 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" (Application Fundamentals)

## Content Navigation (Left Panel 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.

| Field or Control | Description |
|---|---|
|  (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" (Application Fundamentals).

---

This example illustrates the Select Photo page.
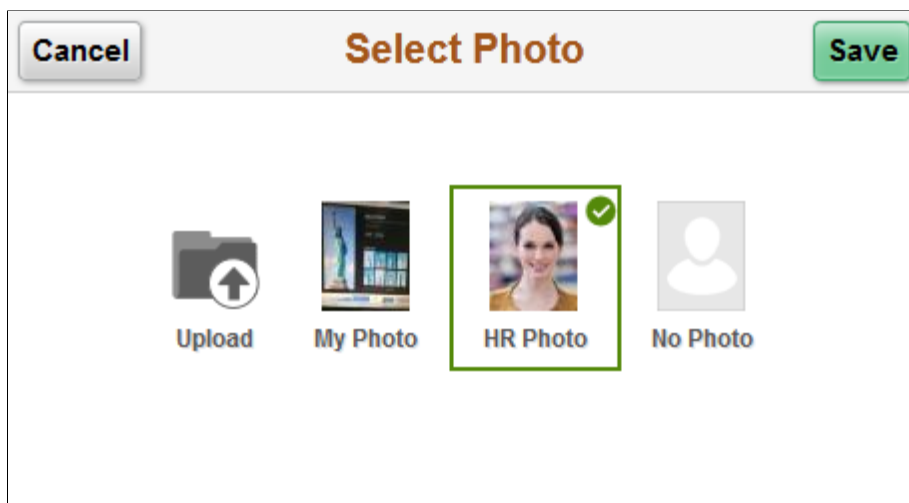
Use these option to choose the photo for pages that display an employee photo throughout the system:

| Field or Control | Description |
|---|---|
| **Upload** | Select to upload your own photo image. This image becomes the **My Photo** image. The photo must be a JPEG and the photo upload size is determined by the photo settings on the "HCM Options Page" (Application Fundamentals). |
| **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 Homepage" (Application Fundamentals), then select the Addresses tab or tile.

- **Self Service** > **Personal Information** > **Personal Details**

- (Employee) Navigate to the (Employee) Remote Worker Request - Verify Address Page and select the add button or a row.

This example illustrates the Addresses (summary) page.

**Addresses**

**Home Address**

| 812 Central Avenue<br>Great Falls, MT 59405 | Current | | > |
| 1962 Harrison St<br>Great Falls, MT 59405 | As of 04/28/2023 | Submitted for Approval | |

**Mailing Address**

| 812 Central Avenue<br>Great Falls, MT 59405 | Current | > |

**Business Address**

| 4500 Corporate Lane<br>Pleasanton, CA 94588 | Current | > |

**Other Address**

No Other Address exists.

[ Add Other Address ]

**Note:** The page display may vary by device, access method, and setup configuration. 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 header.

**Important!** Available address types and whether you can add, update, delete, or view as display only are configured on the "Address Type Control Page" (Application Fundamentals).

| Field or Control | Description |
| --- | --- |
| **<Type> Address** sections | **Note:** Where <Type> indicates what sort of address details you are accessing, such as Home Address.<br><br>Select an address row to access the <u><Type> Address (Detail) Page</u> and view, update, or delete your address details. |
| **Add <Type> Address** button | This button appears when you have not defined the address type and you have been granted edit ability.<br><br>Select to add an address type. |

## When Using Approvals

When using approvals (AWE) and the employee 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 was 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.

**Note:** Managers will use the "Pending Approvals - <Transaction Name> Page" (PeopleSoft eProfile Manager Desktop) for an *Address Change* transaction request to approve and address change.

### Related Links

"Using Fluid Approvals to Approve Self Service Transaction Requests" (PeopleSoft eProfile Manager Desktop)
"Configuring Address and Contact Types for Fluid Self Service" (Application Fundamentals)

## <Type> Address (Detail) Page

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

**Note:** Where <Type> indicates what sort of address details you are accessing, such as *Home Address*.

Navigation:

- Select an address on the Addresses (summary) page to update an existing address.

- Select the **Add Address** button or icon on the Addresses (summary) page.

- (Employee) Navigate to the (Employee) Remote Worker Request - Verify Address Page and select the add button or a row.

This example illustrates the <Type> Address (Detail) page that was configured as Full Edit, allowing the employee to edit or event delete the address.

| Cancel | **Other Address** | Save |
|---|---|---|

**Instructions**

To save United States addresses at least one of the following fields must get populated: Address 1, Address 2, Address 3

| | |
|---|---|
| Change As Of | 04/28/2023 |
| Address Type | Other |
| *Country | United States |
| Address 1 | 169 Travis Hill |
| Address 2 | |
| Address 3 | |
| City | Tahoe |
| State | California |
| Postal | 96150 |
| County | |

**Attachments**

You have not added any Attachments.

Add Attachment

Delete

**Note:** The page layout and options vary depending on the value in the **Country** field and the address type configuration. The "Address Type Control Page" (Application Fundamentals) configuration determines whether you can add, update, delete, or only view an address type.

## 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.

| *Field or Control* | *Description* |
|---|---|
| **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 Pending Approvals - "Attachments Page" (PeopleSoft eProfile Manager Desktop). After a request with an attachment is approved, administrators can view the attachments when accessing the Modify Person component from the "Modify Person Tile" (PeopleSoft Human Resources Administer Workforce).

Administrators can view attachments employees uploaded from this self service page using the Modify Person component (see "Add (or Edit) Address Page" (PeopleSoft Human Resources Administer Workforce)).

See also "(Fluid) Pages Used to Update Personal Data" (PeopleSoft Human Resources Administer Workforce) and "Modify Person Tile" (PeopleSoft Human Resources Administer Workforce).

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

Video: PeopleSoft Fluid HCM Attachments

Video: Image Highlights, PeopleSoft HCM Update Image 27: Fluid HCM Attachments Uptake for Address Transaction"Understanding Country Codes" (Application Fundamentals)

## Using Approvals

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.

**Note:** Managers will use the "Pending Approvals - <Transaction Name> Page" (PeopleSoft eProfile Manager Desktop) for an *Address Change* transaction request to approve and address change.

### Related Links

"Administering Country Codes" (Application Fundamentals)
"Configuring Address and Contact Types for Fluid Self Service" (Application Fundamentals)

## 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 Homepage" (Application Fundamentals), then select the **Contact Details** tab or tile on the Personal Details page.

This example illustrates the Contact Details page.

**Contact Details**

**Phone**

➕

| Number | Extension | Type | Preferred | |
|--------|-----------|------|-----------|---|
| 925.694.0025 | | Business | | ⟩ |
| 555/123-4567 | | Home | | ⟩ |
| 555/123-4567 | | Main | ✓ | ⟩ |

**Email**

➕

| Email Address | Type | Preferred | |
|---------------|------|-----------|---|
| betty@xyzcompany.com | Business | | ⟩ |
| blocherty@mymail.com | Home | ✓ | ⟩ |

**Instant Message**

➕

| ID | Protocol | Domain | Preferred | |
|----|----------|--------|-----------|---|
| BettyLocherty | YAHOO | YAHOO | ✓ | ⟩ |

**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 header.

Select a row to view, 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

- Instant Message Page

**Related Links**
"Configuring Address and Contact Types for Fluid Self Service" (Application Fundamentals)

# 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.

This example illustrates the Phone Number page configured as Full Edit and allows the employee to edit and delete the phone number.



**Note:** The page layout and options vary depending on the "Phone Type Control Page" (Application Fundamentals) configuration settings and determines whether you can add, update, delete, or only view a phone type.

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, if available, 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.

**Related Links**

"Configuring Address and Contact Types for Fluid Self Service" (Application Fundamentals)

# 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.

This example illustrates the Email Address page.



**Note:** The page layout and options vary depending on the "Email Type Control Page" (Application Fundamentals) configuration settings and determines whether you can add, update, delete, or only view an email type.

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, if available, to remove the email address. If you delete a preferred email address, the system automatically marks the first remaining email address as preferred.

**Related Links**

"Configuring Address and Contact Types for Fluid Self Service" (Application Fundamentals)

# 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.

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.

## 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 Homepage" (Application Fundamentals), then select the Emergency Contacts tab or tile on the Personal Details 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.

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.

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.

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.

## 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 Homepage" (Application Fundamentals), then select the Social Media tab or tile on the Personal Details 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.

| Field or Control | Description |
|---|---|
| [Excel icon] Download to Excel Social Media button | Select this button to export the data to an Excel spreadsheet. |
| [Magnifying glass icon] 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.

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.

| Field or Control | Description |
|---|---|
| **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" (Application Fundamentals).<br><br>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 Homepage" (Application Fundamentals), then select the Marital Status tab or tile on the Personal Details page.

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

- "Processing the Divorce Event" (PeopleSoft eBenefits)

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

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 Homepage" (Application Fundamentals), then select the Name tab or tile on the Personal Details page.

This example illustrates the Name (summary) page when name groups are not enabled for the name format type.



This example illustrates the Name (summary) page when name groups are enabled for the name format type.



**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.

The page initially shows a summary of both the **Formal Name** and **Display Name** by default (these labels can be modified via the Name Format Types - "Format Name Fields Page" (Application Fundamentals) so you can display other labels such as Legal Name or Chosen Name). Select **Details** to expand the section to show additional information.

Fields and layout in the **Details** section will vary based on the Name Format Types component settings (see "Setting Up Additional Name Information" (Application Fundamentals)). When the **Use Formal and**

**Display Name Groups** setting is enabled on the setup table, **Formal Name** and **Display Name** act as column headers, listing the fields that correspond to the formal and display field configuration

If an employee has submitted a name change request and approvals are enabled, both the current row and the pending row will appear. When 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 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 row on the Name (Summary) Page.

This example illustrates the Name (detail) page when name groups are not enabled for the name format type.

This example illustrates the Name (detail) page when name groups are enabled for the name format type.



The layout and fields on this page vary depending on the Name Format Types component setup (see "Setting Up Additional Name Information" (Application Fundamentals)). Available fields vary by name format type, such as *English* or *Chinese*. Also, when the **Use Formal and Display Name Groups** configuration setting is enabled on the "Name Format Type Page" (Application Fundamentals), the page will display the following group box sections:

- **Formal Name**: Use these name fields to enter your legal name. These names will be used for official purposes, such as government documents.

- **Preferred Name** (also known as Display Name): Use these name fields to enter the name you wish to be known by. These names will appear on most transaction pages, headers, and reports.

**Note:** The name group labels are configurable and may vary from what is shown here.

When groups are not enabled for a name format type, the system will use the preferred field names.

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 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.

| Field or Control | Description |
|---|---|
| **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 eProfile Manager Desktop).

Administrators can view attachments employees uploaded from this self service page using the Modify Person component (see "Name Page" (PeopleSoft Human Resources Administer Workforce)).

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

Video: PeopleSoft Fluid HCM Attachments

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

# Gender Identity Page

Use the Gender Identity page (HR_EE_GENDER_FL) to view a summary of your gender identity and expression details.

Navigation:

Select the Personal Details Tile on a PeopleSoft Fluid "Employee Self Service Homepage" (Application Fundamentals), then select the Gender Identity tile on the Personal Details dashboard.

**Important! Enable Gender Identity** must be enabled on the Installation Table - "HCM Options Page" (Application Fundamentals) for employees to be able to access this page from the tile.

**Note:** This page is not available from the Personal Details Navigation Collection.

This example illustrates the Gender Identity page when the employee is assigned to a region configured for gender identification.
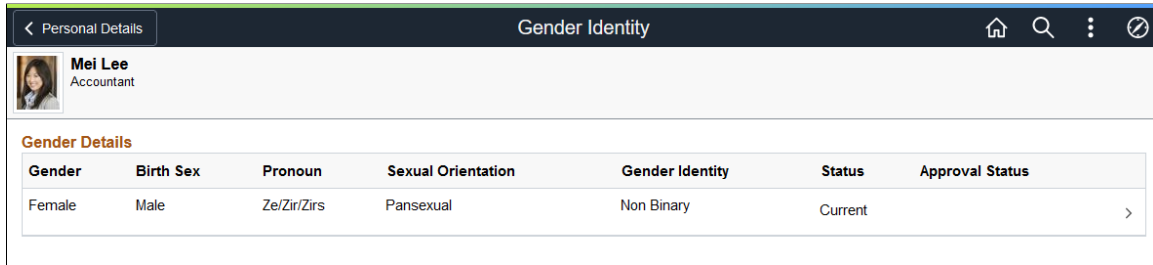


These videos provide an overview of the gender identity functionality:

Video: Image Highlights, PeoleSoft HCM Update Image 41: Gender Identity and Expression

Video: PeopleSoft Gender Identity and Expression

**Note:** The page will not display historical gender identity rows for the employee. It will display the current row, future rows, and those pending approval. However, the administrator can use the "Biographical Details Page" (PeopleSoft Human Resources Administer Workforce) to view historical information for a person.

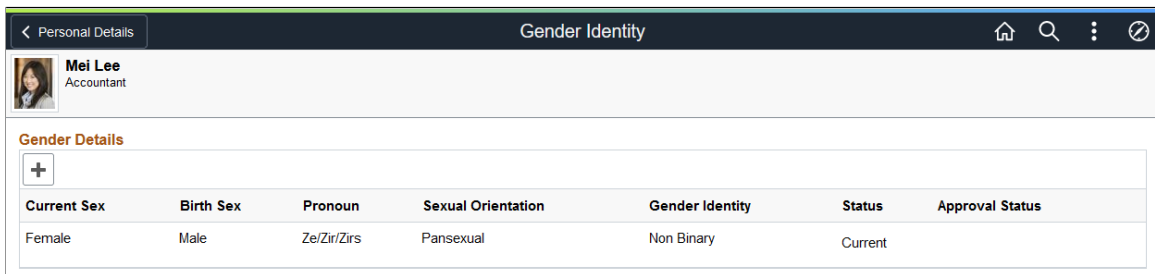| *Field or Control* | *Description* |
|---|---|
| **Gender** or **Current Sex** | Displays the current sex that is defined in your Personal Data pages. <br><br> **Note:** This field label is configurable and may vary. **Gender** displays by default, and **Current Sex** is delivered as the configurable new label, but these can be overwritten. See the "Gender Configuration Page" (Application Fundamentals) on information on how to change the label. |
| **Status** | Displays if a row is current or the date when it will become current. |
| **Approval Status** | Displays if the row has been submitted for approval. Rows that have been approved will be blank. <br><br> You can have only one pending (*Submitted for Approval*) row at a time. When a pending approval row exists, you cannot update gender details. |
| > Gender Details Edit arrow icon | Select the row with the Gender Details Edit arrow > icon to access the Gender Details Page to update and submit updated information about your gender identity. <br><br> **Note:** If your job data lists a region that is not configured for and participating in the gender identity functionality, this page will not display the edit arrow >. |

## Working with Regions and Recording Gender Identity Information

Since gender information is driven by region, there are situations that will impact what you can access on the Gender Identity pages.

Assuming all setup has been done to enter gender details, consider the following scenarios in regards to the regulatory region you are assigned on the Job Data - "Work Location Page" (PeopleSoft Human Resources Administer Workforce):

• An employee transfers from one region (set up for gender identification) to another region (set up for gender identification). The Gender Identity page will display an Add button for the employee to enter gender details, since values may vary by region.

  This example illustrates the Gender Identity page when you move to a new regulatory region and need to enter gender information specific to that region by using the Add + button.



| Field or Control | Description |
|---|---|
|  Add button | Displays this button when you change regions and you need to update gender information to reflect that region's specifications. |

• An employee's primary job is associated with a region that is not configured for gender identification. In this case, the fields on the Gender Identity page will only display the **Gender** (or **Current Sex**) field and you cannot access the Gender Details page to enter additional information.

  This example illustrates the Gender Identity page when you moved to a new regulatory region and the region is not set up to track gender identity information.
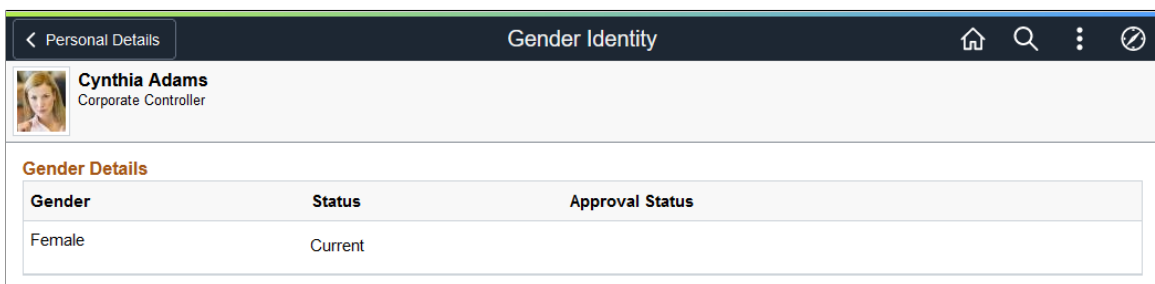


# Gender Details Page

Use the Gender Details page (GENDER_EDIT_SCF) to view or enter gender identity and expression details.

Navigation:

Select a row or the Add button from the <u>Gender Identity Page</u>.

This example illustrates the Gender Details page.



Use this page to view or enter gender identity information that you want to provide to your Human Resources department to be stored in your Personal Data. Enter only those fields you wish to record, with the exception of **Gender** (or **Current Sex**), which is a required field.

This information will only be available to the HR administrator accessing Personal Data, with the exception of **Gender** (or **Current Sex**) and pronouns. **Gender** (or **Current Sex**) is a common field used throughout the HCM application, such as on the benefits pages, and only viewable to you and HR. Pronouns will appear on the company directory, if configured to display.

| *Field or Control* | *Description* |
|---|---|
| **Change As Of** | Enter the date that you want to make updates to your gender identity information. When you submit this information and it is approved, the system will use this date to insert a row in the **Biographical History** section of the "Biographical Details Page" (PeopleSoft Human Resources Administer Workforce) in Personal Data.<br><br>If you use the same date for a row that already exists in Personal Data, the system will correct the information for that row with the new details you enter here. |

| Field or Control | Description |
|---|---|
| **Region** | Displays the regulatory region you are assigned on the Job Data - "Work Location Page" (PeopleSoft Human Resources Administer Workforce). The regulatory region controls the valid values for the gender-related fields. |

The setup for the following field is defined on the "Gender Configuration Page" (Application Fundamentals). The setup determines the following:

- The name of the field label. This label is configurable, where **Gender** is the label provided by default and **Current Sex** is delivered as the configurable new label, but these can be overwritten.

- If the **Gender** (**Current Sex**) field should be display only or editable. If it is display only, you will need to contact your HR administrator to update the information.

| Field or Control | Description |
|---|---|
| **Gender** or **Current Sex** | Displays your current sex defined in Personal Data. <br><br> If this field is available, enter your current sex. When you update this information, the system triggers the approval process. After this gender change request has been approved, the system will update the Personal Data pages with the new **Gender** (**Current Sex**) value as of the specified date. |

The setup on the "Gender Details Page" (Application Fundamentals) determines if the following fields are available for edit and their valid values. When fields are shown as display only, you will need to contact your HR administrator to update the information.

| Field or Control | Description |
|---|---|
| 🛈 <br><br> &lt;gender field label&gt; List Information icon | Select this icon to access the "&lt;Gender Field Label&gt; Values Page" (PeopleSoft Human Resources Administer Workforce) and view descriptions of values for gender-related fields. <br><br> **Note:** Field value definitions are defined by region. |
| **Birth Sex** | View or enter the sex you were assigned at birth. |

| Field or Control | Description |
|---|---|
| **Pronoun** | View or select the pronouns you want people to use when addressing you.<br><br>When you provide this information, and the system is configured to show pronouns, they will display next to your name on the Company Directory Profile pages in fluid (see "Using the PeopleSoft Fluid User Interface for the Company Directory" (PeopleSoft Human Resources Administer Workforce)).<br><br>To configure the Company Directory to display pronouns in fluid, see the "Chart and Profile Settings - Profile Content Page" (PeopleSoft Human Resources Administer Workforce). |
| **Sexual Orientation** | View or enter what you would describe as your inherent attraction to a sexual partner. |
| **Gender Identity** | View or enter what you would describe as your inner sense or self perception of being male, female, a blend of both, or neither. Your gender identity can be the same or different from the sex assigned at birth or your current sex. |
| **Save** button | Click to save and submit your changes.<br><br>Changes to the **Gender** (**Current Sex**) field, trigger the approval process, since this field is used by other applications in the system. Approvers can take action on these requests through the "Pending Approvals - Gender Identity Change Page" (PeopleSoft eProfile Manager Desktop). Upon approval, the information is written to Personal Data using the **Change As Of** value as the effective date.<br><br>When you make changes to other fields on this page, the system automatically updates this and the Personal Data pages without needing approval. |

## Attachments

Use this section to manage attachments by uploading, deleting, or updating attachments.

The setup on the "Gender Details Page" (Application Fundamentals) determines if the following fields are available for edit. When fields not available, you will need to contact your HR administrator to display the information.

| Field or Control | Description |
|---|---|
| **Add Attachment** button | If enabled and available, select to access the File Attachment page and upload supporting documents. |

| Field or Control | Description |
|---|---|
| **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 this page. |

Administrators can view attachments employees uploaded from this self service page using the Modify Person component (see "Biographical Details Page" (PeopleSoft Human Resources Administer Workforce)).

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

Video: PeopleSoft Fluid HCM Attachments

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

### Voluntary Self-Identification

The setup on the "Gender Details Page" (Application Fundamentals) determines if the following field is available. When not available, you will need to contact your HR administrator to display the information.

| Field or Control | Description |
|---|---|
| **I agree to self identify** | Select to indicate that you agree with the gender attribute details you provided. This is required to save the data you entered on this page. |

## 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 Homepage" (Application Fundamentals), then select the Ethnic Groups tab or tile on the Personal Details page.

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" (Application Fundamentals).



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.

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.

This example illustrates the Ethnic Group page.



Select the Delete button to remove the ethnic group.

## 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 Homepage" (Application Fundamentals), 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.

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



**Disability**

**Betty Locherty** ⌄
Finance Director

**Voluntary Self-Identification of Disability**

Form CC-305                                                                OMB Control Number 1250-0005
Page 1 of 1                                                                Expires 04/30/2026

Name:  Betty Locherty                                         Date:  08/11/2023

Employee ID:  KU0007
                        (if applicable)

**Why are you being asked to complete this form?**

We are a federal contractor or subcontractor. The law requires us to provide equal employment opportunity to qualified people with disabilities. We have a goal of having at least 7% of our workers as people with disabilities. The law says we must measure our progress towards this goal. To do this, we must ask applicants and employees if they have a disability or have ever had one. People can become disabled, so we need to ask this question at least every five years.

Completing this form is voluntary, and we hope that you will choose to do so. Your answer is confidential. No one who makes hiring decisions will see it. Your decision to complete the form and your answer will not harm you in any way. If you want to learn more about the law or this form, 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?**

A disability is a condition that substantially limits one or more of your "major life activities." If you have or have ever had such a condition, you are a person with a disability. **Disabilities include, but are not limited to:**

- Alcohol or other substance use disorder (not currently using drugs illegally)
- Autoimmune disorder, for example, lupus, fibromyalgia, rheumatoid arthritis, HIV/AIDS
- Blind or low vision
- Cancer (past or present)
- Cardiovascular or heart disease
- Celiac disease
- Cerebral palsy
- Deaf or serious difficulty hearing
- Diabetes

- Disfigurement, for example, disfigurement caused by burns, wounds, accidents, or congenital disorders
- Epilepsy or other seizure disorder
- Gastrointestinal disorders, for example, Crohn's Disease, irritable bowel syndrome
- Intellectual or developmental disability
- Mental health conditions, for example, depression, bipolar disorder, anxiety disorder, schizophrenia, PTSD
- Missing limbs or partially missing limbs
- Mobility impairment, benefiting from the use of a wheelchair, scooter, walker, leg brace(s) and/or other supports

- Nervous system condition, for example, migraine headaches, Parkinson's disease, multiple sclerosis (MS)
- Neurodivergence, for example, attention-deficit/hyperactivity disorder (ADHD), autism spectrum disorder, dyslexia, dyspraxia, other learning disabilities
- Partial or complete paralysis (any cause)
- Pulmonary or respiratory conditions, for example, tuberculosis, asthma, emphysema
- Short stature (dwarfism)
- Traumatic brain injury

**Please check one of the boxes below:**

☐ Yes, I have a disability, or have had one in the past

☐ No, I do not have a disability and have not had one in the past

☐ I do not want 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 ]

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

Video: 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 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).

| Field or Control | Description |
| --- | --- |
| **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?

| Field or Control | Description |
| --- | --- |
| **Please check one of the boxes below** | Select one disabled value option. One must be selected.<br><br>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 Homepage" (Application Fundamentals), then select the Veteran Status tab or tile on the Personal Details 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.

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

### Self-Identification

As a Government contractor subject to VEVRAA, we are required to submit a report to the United States Department of Labor each year identifying the number of our employees belonging to each specified "protected veteran" category. If you believe you belong to any of the categories of protected veterans listed above, please indicate by selecting the appropriate option below.

○ I belong to the following classifications of protected veterans (choose all that apply):

☐ Disabled Veteran

☐ Recently Separated Veteran

☐ Active Duty Wartime or Campaign Badge Veteran

☐ Armed Forces Service Medal Veteran

○ I am a protected veteran, but I choose not to self-identify the classifications to which I belong.

○ I am NOT a protected veteran.

○ I am NOT a veteran.

Military Discharge Date [            ]

### Reasonable Accommodation Notice

If you are a disabled veteran it would assist us if you tell us whether there are accommodations we could make that would enable you to perform the essential functions of the job, including special equipment, changes in the physical layout of the job, changes in the way the job is customarily performed, provision of personal assistance services or other accommodations. This information will assist us in making reasonable accommodations for your disability.

Submission of this information is voluntary and refusal to provide it will not subject you to any adverse treatment. The information provided will be used only in ways that are not inconsistent with the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended.

The information you submit will be kept confidential, except that (i) supervisors and managers may be informed regarding restrictions on the work or duties of disabled veterans, and regarding necessary accommodations; (ii) first aid and safety personnel may be informed, when and to the extent appropriate, if you have a condition that might require emergency treatment; and (iii) Government officials engaged in enforcing laws administered by the Office of Federal Contract Compliance Programs, or enforcing the Americans with Disabilities Act, may be informed.

[Submit]

Video: 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 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 Homepage" (Application Fundamentals), 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.

This example illustrates the Form I-9 page when you still need to submit the form.

This example illustrates the Form I-9 page when you have already submitted the form.



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

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

| Field or Control | Description |
|---|---|
| I-9 Instructions for Employee link | Select this link to open a new browser window and review instructions on how to complete Form I-9. |
| Submit Form I-9 button | This button is available when you need to submit the Form I-9. Select to access the "(Employee) Employment Eligibility Verification Page, Section 1. Employee Information and Attestation" (PeopleSoft Human Resources Administer Workforce) to enter and submit I-9 information as the employee. |
| View Form I-9 button | This button is available when you have already submitted I-9 verification data. Select to view the Employment Eligibility Verification page in display only mode. |
| Edit Form I-9 button | This button is available when you have already submitted I-9 verification data. Select to access the Employment Eligibility Verification page to make corrections to the I-9 and resubmit the form. |

To access the form and see field definitions for the I-9, see the "(Employee) Employment Eligibility Verification Page, Section 1. Employee Information and Attestation" (PeopleSoft Human Resources Administer Workforce) (HR_I9_EE) 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 Homepage" (Application Fundamentals), then select the Business Partners tab or tile on the Personal Details page.

- From the "OnBoarding Dashboard" (PeopleSoft Human Resources Administer Workforce), select the "Business Partners Tile" (PeopleSoft 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 Human Resources Administer Workforce).

This example illustrates the Business Partners page.

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

**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:

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

# 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 Homepage" (Application Fundamentals), then select the Additional Information tab or tile on the Personal Details 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:

Video: 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 Human Resources Administer Workforce) documentation.

# Managing Remote Worker Requests as an Employee using Fluid

With an increased number of employees working outside the traditional office setting, you can record and track this time using PeopleSoft HCM. As an employee, you can submit remote worker requests using the Remote Worker tile and pages. When approvals are enabled, you can then submit your request for approvals.

These videos provide an overview of the Fluid Remote Worker feature:

Video: Image Highlight, PeopleSoft HCM Update Image 40: Remote Worker

Video: PeopleSoft Remote Worker

Video: Image Highlights, PeopleSoft HCM Update Image 46: Remote Worker Home Address Edit

Video: Image Highlight, PeopleSoft HCM Update Image 48: Remote Worker Request Update Enhancement

This topic provides and overview of the Remote Worker Request page layout for the employee and lists the pages employees use to enter remote worker requests for themselves.

## Pages Used to Enter Remote Worker Requests as an Employee Using Fluid

| Page Name | Definition Name | Usage |
|---|---|---|
| Remote Worker Tile (for Employees) | HC_HR_REMOTE_WORKER_FL (This is the cref for this tile) | Enter and review your remote worker requests using fluid pages. |
| "Remote Worker Request Page" (PeopleSoft Human Resources Administer Workforce) | HR_RW_LANDING_FL | Initiate a remote worker request. |
| "Add Remote Work Request (or Edit Request) Page" (PeopleSoft Human Resources Administer Workforce) | HR_RW_ADD_RQST_FL | Initiate a remote worker request. |
| "Remote Worker Request - Guidelines Page" (PeopleSoft Human Resources Administer Workforce) | AGC_INFO_FL | Review any institution policies or guidelines to work remote. |
| (Employee) Remote Worker Request - Acknowledgement Page | HR_RW_ACK_FL | Employees use this page to acknowledge their agreement to the terms and conditions of working remote. |
| (Employee) Remote Worker Request - Verify Address Page | HR_EE_ADDR_FL | Employees use this page to review their home and mailing address without having to leave the Remote Worker Request pages.

See also Addresses (Summary) Page. |

| Page Name | Definition Name | Usage |
|---|---|---|
| (Employee) <Type> Address (Detail) Page | ADDRESS_DFT_SCF | Update address information and view or add attachments that may support the update. |
| "Remote Worker Request - Request Details Page" (PeopleSoft Human Resources Administer Workforce) | HR_RW_RQST_DTL_FL | Enter the specifics of the remote work request. |
| "Remote Worker Request - Attachments Page" (PeopleSoft Human Resources Administer Workforce) | HR_RW_SS_ATTACH_FL | Add or view attachments and notes for a request. |
| (Employee) Remote Worker Request - Workplace Support Page | EOQF_QSTNR_PRVW_FL | Employees use this page to enter equipment details, internet access, and acknowledge other agreements needed to create a successful workplace environment. |
| "Remote Worker Request - Review and Submit Page" (PeopleSoft Human Resources Administer Workforce) | HR_RW_REVIEW_FL | Review a summary of the request and submit it for approvals. |
| "Remote Worker Confirmation Page" (PeopleSoft Human Resources Administer Workforce) | HR_RW_SUB_CNF_FL | Confirm that your request has been submitted successfully. |
| "Request Details Page" (PeopleSoft Human Resources Administer Workforce) | HR_RW_REVIEW_FL | View a complete summary of the remote work details for that start date. |

**Note:** This topic discusses the pages specific to the employee remote worker request pages. For common pages used by all remote worker users (administrator, manager, and employee), follow the links listed in the preceding table, or see the "(Fluid) Managing Remote Worker Information" (PeopleSoft Human Resources Administer Workforce) topic.

## The Activity Guide Composer Framework for the Remote Worker Request Component for Employees

In fluid, the Remote Worker Request component pages appear within the context of the Activity Guide Composer. The PeopleSoft HCM application delivers the *RWORKER* Remote Worker Request templates for the *Fluid Remote Worker Employee* pages and contains these steps from the *HR_RWORK* Remote Worker Category:

| Page | HR_RWORK Category Step |
|---|---|
| Guidelines | *INSTRUCTIONS* |

| Page | HR_RWORK Category Step |
| --- | --- |
| Acknowledgement | *RW_ACKNOWLEDGE* |
| Verify Address | *EE_ADDR* |
| Request Details | *REQUEST_DTL* |
| Attachments | *ATTACH* |
| Workplace Support | *WRKSUPPORT* |
| Review and Submit | *REVIEW* |

(Employee view) This example illustrates the layout for the Remote Worker Request pages for an employee.



The activity guide shows a list of remote worker request pages (steps) in the left panel and the page that corresponds to the current selected page, or step, in the right panel. The activity guide also provides navigation buttons for navigating through and saving the page steps.

**Note:** Throughout this topic, the page illustrations show sections of the remote worker process without the context of the left panel activity guide step list. Even though the framework is not illustrated, remember that all steps appear within that framework.

## Remote Worker Request Page Header (Sub-Banner)

A gray area under the main page banner displays the component title *Remote Worker Request* and contextual information that is specific to the remote worker request, including the person's name and job title, as well as actions buttons.

| Field or Control | Description |
|---|---|
| **< Previous**  Previous button | Click this button to navigate to the previous page.<br><br>Navigating to another page saves the data you entered on that page.<br><br>The button is not visible on the first step in the request. |
| **Next >**  Next button | Click this button to navigate to the next page.<br><br>Navigating to another page saves the data you entered on that page.<br><br>The Review and Submit page does not display the **Next** button, it displays a **Submit** button instead. |
| **Submit**  Submit button | This button appears on the Remote Worker Request - Review and Submit Page only.<br><br>**Note:** Your request will remain in *Draft* status until you click the **Submit** button.<br><br>When approvals are required for updating or creating requests, it will be sent to the approving managers or administrators, where they will use the Pending Approvals - Remote Worker Page to take action on a request.<br><br>This video provides an overview of Fluid Approvals:<br><br>Video: PeopleSoft HCM Fluid Approvals |

## Left Panel Navigation

The page framework includes a left panel that lists the page tabs in the remote worker request process. Each step displays a status, which is either *Not Started* or *Visited*. Required steps will show as *In Progress* until you complete the step or move away from the page. When you complete a required step and move on, the status changes to *Complete*. Users can navigate to steps by clicking the page tab or using the navigation buttons in the header (sub-banner). In the Remote Worker Request activity guide, selecting or moving to another page triggers a save process for the page you are leaving. The process will remain in draft status until you submit the request.

## Pages

The main, right panel displays the page for the current step in the transaction.

**Note:** For the discussion of the transaction page topics that follow, the page illustrations show the individual Remote Worker Request pages without the context of the activity guide step list, although the system will display the left panel step navigation.

| Field or Control | Description |
|---|---|
| **\<Title Text\>** | Displays a page title that includes the step name and corresponds to the tab in the left navigation. |

### Related Links
"Understanding the Activity Guide Composer" (Enterprise Components)

## Remote Worker Tile (for Employees)

Employees use the Remote Worker tile from the Employee Self Service home page to enter and review your remote worker requests using fluid pages.

Navigation:

The Remote Worker tile will display as part of the fluid "Employee Self Service Homepage" (Application Fundamentals) when you have been granted the *Fluid Remote Worker Employee* role and either your job or position allows remote work, or the remote worker installation setting overrides the job and position settings.

This example illustrates the fields and controls on the Remote Worker page.
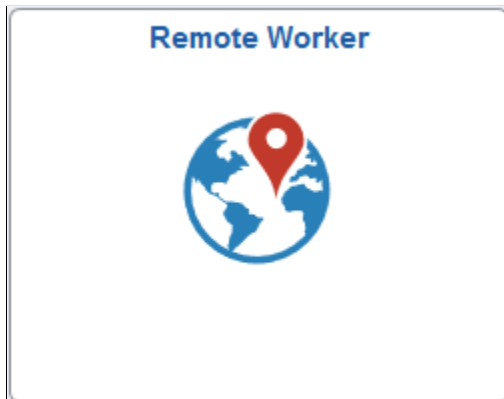


Select this tile to access the "Remote Worker Request Page" (PeopleSoft Human Resources Administer Workforce) in fluid and review or initiate a remote worker request for yourself.

See the "(Fluid) Managing Remote Worker Information" (PeopleSoft Human Resources Administer Workforce) topic for information on the common Remote Worker Request component pages.

## (Employee) Remote Worker Request - Acknowledgement Page

Use the Remote Worker Request - Acknowledgement page (HR_RW_ACK_FL) to acknowledge agreement to the terms and conditions of working remote.

**Note:** This page is available to the employee only. It is not available from the manager or administrator pages.

Navigation:

After accessing the Remote Worker Request component, click the **Next** or **Previous** button or select the **Acknowledgement** tab from the left panel navigation steps.

This example illustrates the fields and controls on the Remote Worker Request - Acknowledgement page.

**Acknowledgement**

By Selecting the "I Agree" checkbox you indicate that you have read and understood the details and acknowledge your agreement.

Terms and Conditions

☑ I Agree

The Acknowledgement page is delivered as a required step and employees must agree to the terms and conditions to fulfill the requirements of this component. The page will show an *In Progress* status while on the page, but will return to *Not Started* if you do not select the check box. Select the check box to change the page status to *Visited*.

**Note:** Once you agree to the terms and conditions and move to another page, this step is locked and no longer accessible.

| Field or Control | Description |
|---|---|
| I Agree | Select this check box to acknowledge you understand the requirements of working remote. |

### Related Links
"Understanding the Acknowledgement Framework" (Enterprise Components)
"Setting Up Remote Worker Configurations" (PeopleSoft Human Resources Administer Workforce)

## (Employee) Remote Worker Request - Verify Address Page

Use the Remote Worker Request - Verify Address page (HR_EE_ADDR_FL) to review your home address and mailing address without having to leave the Remote Worker Request pages.

**Note:** This page is available to the employee only. It is not available from the manager or administrator pages.

Navigation:

After accessing the Remote Worker Request component, click the **Next** or **Previous** button or select the **Verify Address** tab from the left panel navigation steps.

This example illustrates the fields and controls on the Remote Worker Request - Verify Address page.

| Verify Address | | |
|---|---|---|
| **Home Address** | | |
| 801 N. King Street<br>Wilmington, DE 19880 | Current | > |
| **Mailing Address** | | |
| 801 N. King Street<br>Wilmington, DE 19880 | Current | > |

This example illustrates the Remote Worker Request - Verify Address page when an employee has entered a home address change that is pending approval.

| Verify Address | | | |
|---|---|---|---|
| **Home Address** | | | |
| 801 N. King Street<br>Wilmington, DE 19880 | Current | | > |
| 337 Garcia Ct<br>Edgemont, DE 19073 | As of 04/27/2023 | Submitted for Approval | |
| **Mailing Address** | | | |
| 801 N. King Street<br>Wilmington, DE 19880 | Current | | > |

**Note:** This page is the same as the Employee Self Service, Personal Details - Addresses (Summary) Page but only shows the **Home Address** and **Mailing Address** sections.

| Field or Control | Description |
|---|---|
| **Home Address** and **Mailing Address** | Displays the person's home or mailing addresses.<br><br>Select a row to open the <Type> Address (Detail) Page and enter a new home or mailing address.<br><br>**Note:** Employees can submit an address change from Personal Details as well as the Remote Worker Request self-service pages. When an employee enters a new home address from either of these pages and approvals are required, the **Proposed Address** field will appear on many of the Remote Worker pages (see (Fluid) Reviewing and Updating Personal Information). |

**Important!** Managers will use the "Pending Approvals - <Transaction Name> Page" (PeopleSoft eProfile Manager Desktop) for an *Address Change* transaction to approve the address. Approving a remote work request when an address change is pending will not approve the address.

## Related Links

"Understanding the Acknowledgement Framework" (Enterprise Components)

"Setting Up Remote Worker Configurations" (PeopleSoft Human Resources Administer Workforce)

# Remote Worker Request - Request Details Page

Use the Remote Worker Request - Request Details page (HR_RW_RQST_DTL_FL) to enter the specifics of the remote work request.

Navigation:

After accessing the Remote Worker Request component, click the **Next** or **Previous** button or select the **Request Details** tab from the left panel navigation steps.

(Employee View)This example illustrates the Remote Worker Request - Request Details page when an employee has an address change pending.

**Request Details**

| Start Date | 04/24/2023 | | End Date | 05/05/2023 |

**Details**

| | |
|---|---|
| *Remote Worker Type | Fully Remote ⌄ |
| Remote Work Reason | COVID-19 ⌄ |
| Remote Location | Home ⌄ |
| Address | 801 N. King Street Wilmington, DE 19880 |
| Proposed Address | 337 Garcia Ct Edgemont, DE 19073 |

## Details

| Field or Control | Description |
|---|---|
| **Remote Worker Type** | Select one of the following translate values:<br><br>• *Fully Remote*: Employee will be 100 percent remote.<br><br>• *Hybrid*: Employee will work part-time remote and part-time in the office. |
| **Remote Work Reason** | Select the reason for requesting to work remotely. Valid values are defined on the Remote Worker Configuration Page. |

| Field or Control | Description |
|---|---|
| **Remote Location** | Select the location type from which the person will be working remote. Valid values include:<br><br>• *Home*: Displays the person's home address stored in Personal Data in the **Address** field.<br><br>• *Other*: Displays the Add Address button where you can manually add an address.<br><br>• *Workplace*: Displays the Location Name field, where you can enter a company location. |
| **Location Name** | This field appears when you select *Workplace* for the **Remote Location** field.<br><br>Enter a company location name. |
| **Add Address** button | This field appears when you select *Other* for the **Remote Location** field.<br><br>Click this button to access the Address page and enter the address details. |
| **Address** | Displays the current home address where the person will be working remotely.<br><br>**Note:** While the full address appears for the employee, the manager and administrator will only see the state for the employee's home address. |
| **Proposed Address** | This field appears when an employee has submitted a home address change that is pending.<br><br>Displays the new home address from which the employee will be working remotely.<br><br>**Note:** While the full address appears for the employee, the manager and administrator will only see the state of the employee's home address.<br><br>**Note:** Managers will use the "Pending Approvals - <Transaction Name> Page" (PeopleSoft eProfile Manager Desktop) for *Address Change* to approve the address. Approving a remote work request when an address change is pending will not approve the address. |

| Field or Control | Description |
|---|---|
| **Percentage** | This field appears when you select *Hybrid* for the **Remote Worker Type** field.<br><br>Enter the percentage of time this person will be working remotely. This number will be used in the Remote Worker analytics but does not validate against the days a person selects for remote working days.<br><br>See also Remote Worker Insights Dashboard (for Administrators). |
| **Remote Days** | This field appears when you select *Hybrid* for the **Remote Worker Type** field.<br><br>Chose from the following valid values:<br><br>• *Average Days Per Month*<br><br>• *Average Days Per Week*<br><br>• *Specific Days Per Week* |
| **Average Days/Month** (average days per month) | This field appears when you select *Average Days Per Month* for the **Remote Days** field.<br><br>Enter the estimated number of days this person will be working remote over a month's time. |
| **Average Days/Week** (average days per week) | This field appears when you select *Average Days Per Week* for the **Remote Days** field.<br><br>Enter the estimated number of days this person will be working remote over a week's time. |

### Select Days

This section is available when you have indicated a *Hybrid* schedule and selected the *Specific Days Per Week* option for the **Remote Days** field.

Select the days that you will be working remote.

## (Employee) Remote Worker Request - Workplace Support Page

Use the Remote Worker Request - Workplace Support page (EOQF_QSTNR_PRVW_FL) to enter equipment details, internet access, and acknowledge other agreements needed to create a successful workplace environment.

**Note:** This page is available to the employee only. It is not available from the manager or administrator pages.

Navigation:

After accessing the Remote Worker Request component, click the **Next** or **Previous** button or select the **Workplace Support** tab from the left panel navigation steps.

This example illustrates the fields and controls on the Remote Worker Request - Workplace Support page (1 of 2).

This example illustrates the fields and controls on the Remote Worker Request - Workplace Support page (2 of 2).



This pages uses the Questionnaire Framework to gather additional information about the workplace environment.

| Field or Control | Description |
| --- | --- |
| **Save Answers** button | Select this button to save the responses to the questions. |

### Related Links
"Understanding Questionnaire Framework" (Enterprise Components)

# (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.

---

**Note:** Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see "Understanding Notification Composer" (Enterprise Components).

---

## Related Links
"Configuring Self-Service Transactions" (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.

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



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



| Field or Control | Description |
|---|---|
| **Last Working Day** | Select the last working day from the calendar. |
| **Reason** | Select the reason for resignation. |

| Field or Control | Description |
|---|---|
| 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.

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.

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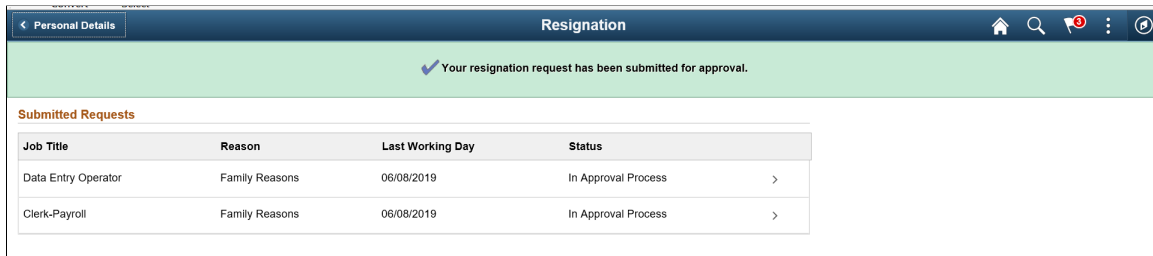


Select a request to view the details. This displays the Request Details modal window as shown.

This example illustrates the Request Details modal window.
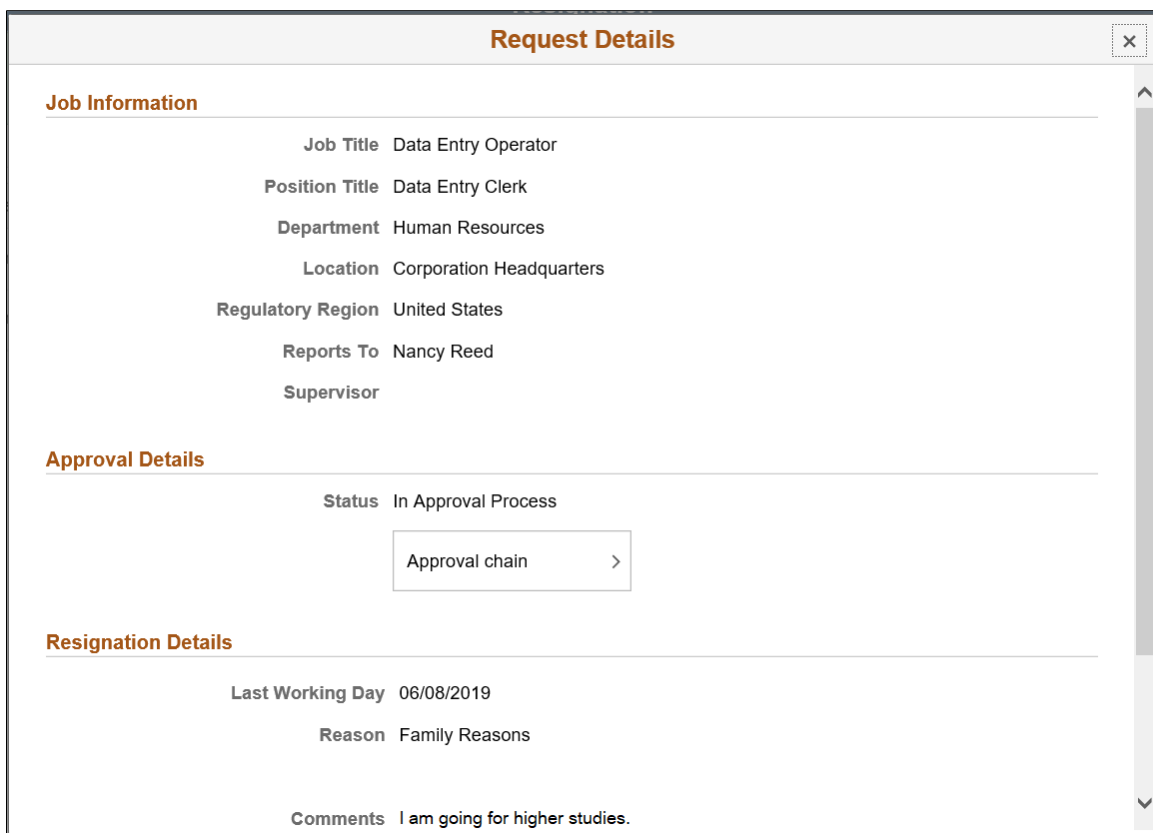


# Approving Resignation Requests

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.

**Note:** Managers can only see the details with approvals.

## 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.

This example illustrates the Pending Approvals page for a manager.
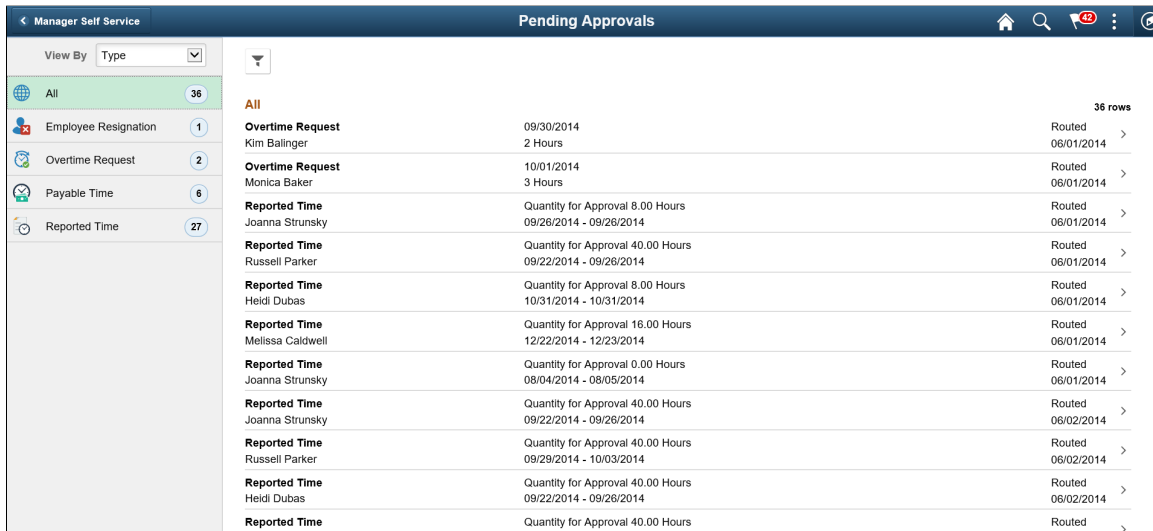


Filter the resignation request submitted by the employee.

## 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.

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.

**Note:** Managers can only see the details with approvals.

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:

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.

    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.

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.

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

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



| Field or Control | Description |
|---|---|
| **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.

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

| Personal Details | Retirement |
| --- | --- |

✔ Your retirement request has been submitted for approval

**Job Information**

| | |
| --- | --- |
| Job Title | Data Entry Operator |
| Department | Accounts Receivable |
| Position | Data Entry Operator |
| Location | New Jersey Operations |
| Regulatory Region | United States |
| Reports To | Christelle Stevenson |
| Supervisor | |

**Approval Details**

| | |
| --- | --- |
| Status | In Approval Process |
| | Approval chain > |

**Retirement Details**

| | |
| --- | --- |
| Last Working Day | 06/11/2019 |
| Reason | Retired from Affiliate |
| Comments | Personal Reasons |

**Attachments**

You have not added any Attachments.

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.

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

| Personal Details | Retirement |
| --- | --- |

✔ Your retirement request has been submitted for approval

**Submitted Requests**

| Job Title | Reason | Last Working Day | Status | |
| --- | --- | --- | --- | --- |
| Data Entry Operator | Retired from Affiliate | 06/11/2019 | In Approval Process | > |
| Clerk-Payroll | Retired from Affiliate | 06/11/2019 | In Approval Process | > |

# 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.

**Note:** Managers can only see the details with approvals.

## 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.

This example illustrates the Pending Approvals page for a manager.
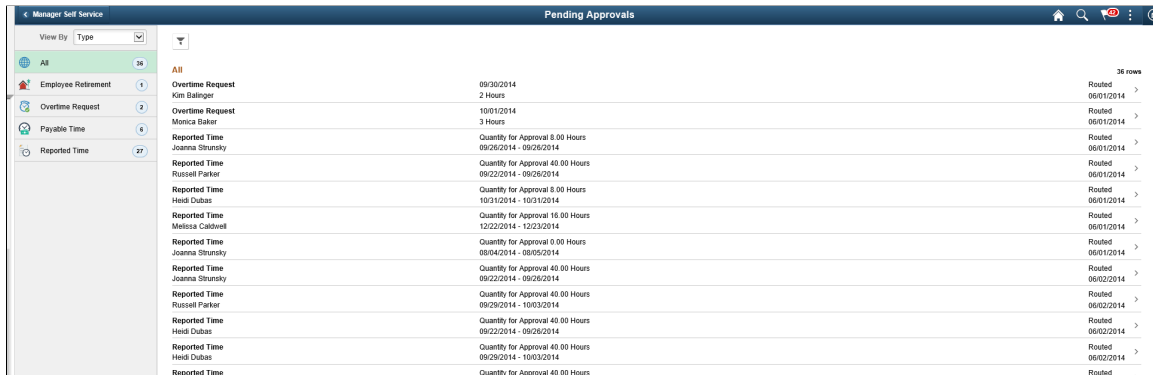


Filter the retirement request submitted by the employee.

## 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.

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.

**Note:** Managers can only see the details with approvals.

To approve the resignation request as a HR administrator, perform the following:
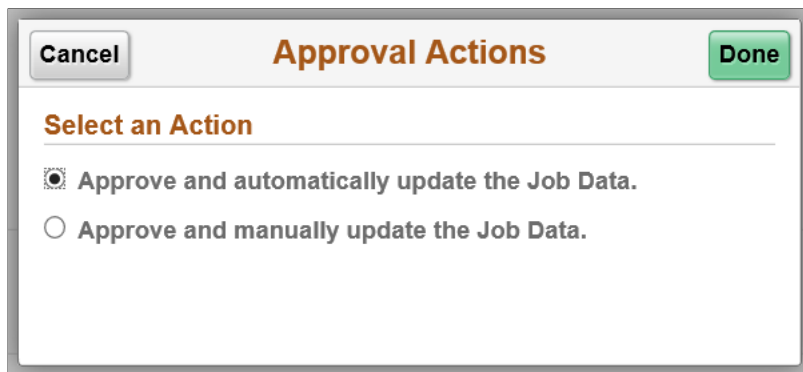
1. Login as HR Administrator.

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:

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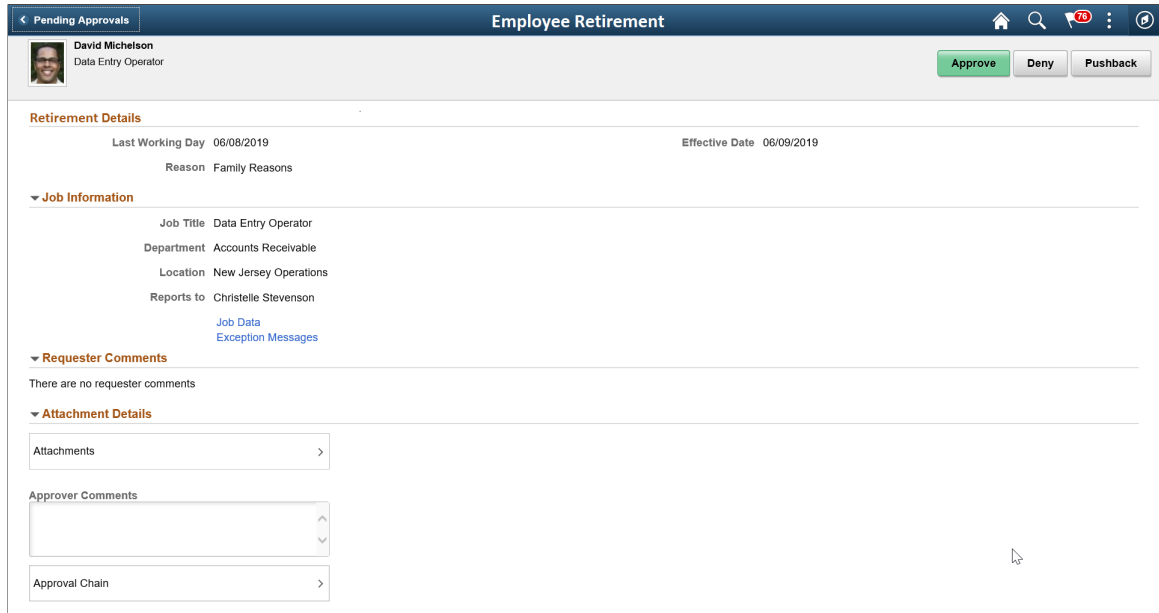


5. Click Job data link to view employee job data.

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.

   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.

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**

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

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



| Field or Control | Description |
|---|---|
| **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. |

| Field or Control | Description |
|---|---|
| **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.