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PeopleSoft HCM 9.2: PeopleSoft eProfile

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Contents

Preface

Understanding the PeopleSoft Online Help and PeopleBooks

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

Hosted PeopleSoft Online Help

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

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

Locally Installed 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.
	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" (Application Fundamentals)

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) article on My Oracle Support 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:
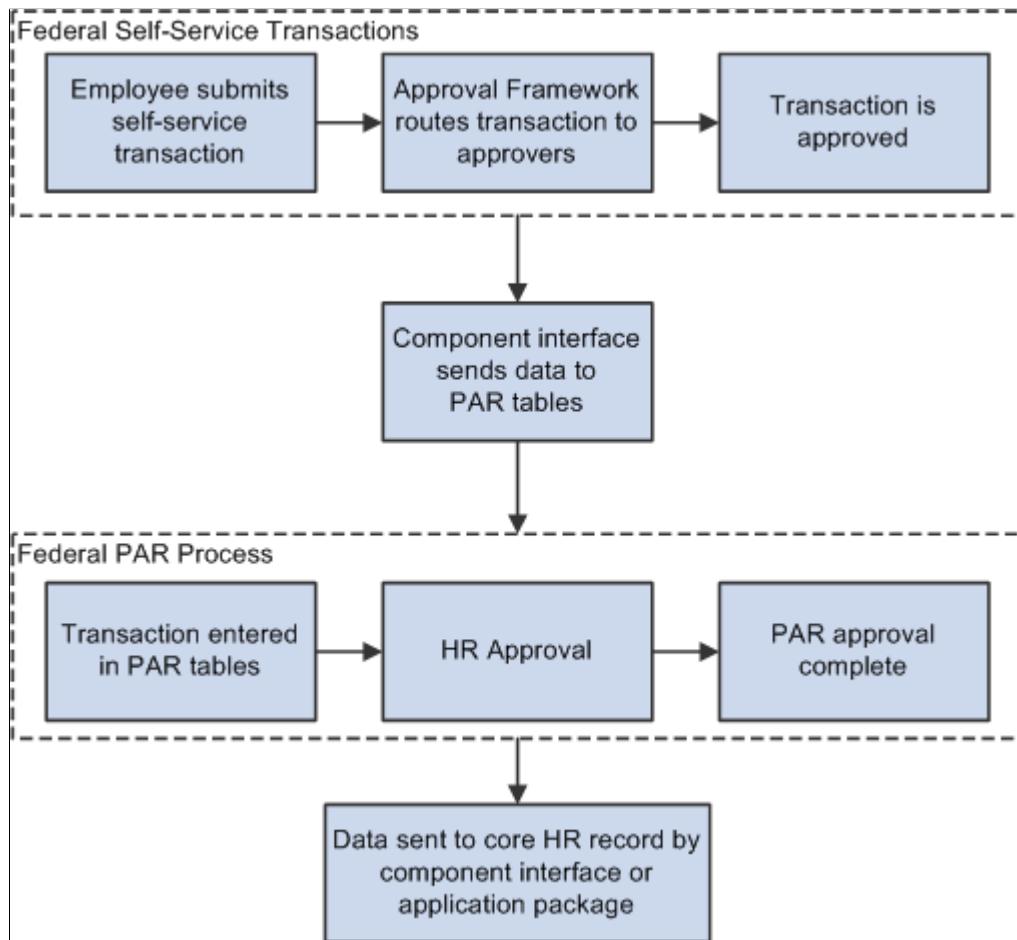
Delivered Approval Flows

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

Understanding WIP Statuses and Approval Steps

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

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

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

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

Transaction Setup Page

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

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data USF** > **Approval 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. **Note:** These codes must be defined as valid statuses for the USFED transaction. This enables the system to process the request using the existing HR Processing USF component when the request has reached final approval in the self-service approval process.
Status Type	Select one of these values for each WIP status: • *Work-in-progress:* The status is used for a request that is neither complete nor canceled. • *Cancelled:* The status is used for a request that has been denied. • *Completed (Final Self Svc Step):* The status is used for a request that has been approved.

Define Steps Page

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

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

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data USF** > **Approval Flow 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. **Important!** For each federal self-service transaction, this page must list every approval step that was defined in the Approval Framework process definition and an additional step for the initial transaction request.
Step Name, **Description** and **Short Description**	Enter a name for this step and appropriate descriptions. 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* • *Pushback* For the first step (which always represents the initial request), create one row for the Request action. For subsequent steps, which represent approver actions, create one row for the Approve action and one row for the Deny action. (The other action in the drop-down list box, *Pending,* is not valid for the Approval Framework approval process, so you do not need to define a WIP status for this action for any of the approval steps.)
Set Status To	Select the WIP status to assign to the transaction when the selected action takes place. This field prompts against the transaction-specific WIP statuses that you define on the Transaction Setup page. As delivered, the transactions that you configure using this page (that is, all transactions other than USFED) have these four statuses: *1st* (first authorization), *2nd* (second authorization), *DNY* (denied), and *REQ* (requested).

Defining PAR Tracking Data

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

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

Page Used to Define PAR Tracking Data

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

Understanding PAR Tracking Data

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

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

Related Links

"Understanding the Administering PAR System" (PeopleSoft 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.
Reason Code	Select the reason code that you want written to the government PAR tables for the transaction. These codes are defined on the Action Reasons page.
Nature of Action Code	Select the nature of action code that you want written to the government PAR tables for the transaction. These codes are defined on the Nature of Action Table page.
Legal Authority (1)	Select the legal authority (1) that you want written to the government PAR tables for the transaction. These codes are defined on the Legal Authority page.
Legal Authority (2)	Select the legal authority (2) that you want written to the government PAR tables for the transaction. These codes are defined on the Legal Authority page.
PAR Remarks	Select the PAR remarks that you want written to the government PAR tables for the transaction. These codes are defined on the Personnel Action Rqst Rmks page.

Identifying Self-Service Administrators and Defining Notification Details

To identify self-service administrators and define notification details, use the Approval 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.
Notify on CI Success (notify on component interface success)	Select this check box to have the person who is identified in the **Administrator Role** field notified when the process runs successfully.
Notify on CI Warning (notify on component interface warning)	Select this check box to have the person who is identified in the **Administrator Role** field notified when a warning occurs during processing.
CI / Notification Details	Click this link to open the CI / Notification Details page.

CI / Notification Details Page

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

Navigation:

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

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

SS Administrator Notification

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

Chapter 3

Using eProfile

Prerequisites for Using eProfile

Before you can use the eProfile transactions,

1. Activate eProfile on the Installation Table.

   See "Products Page" (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. Available fields for an employee may vary by country.
Address Change Page	HR_HOME_MAILING	Initiate the address change request. You can enter only current or future effective-dated address changes to avoid processing issues with benefits and payroll.

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

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.
(Employee) Employment Eligibility Verification Page, Section 1. Employee Information and Attestation	HR_I9_EE	(Employee) Complete the Section 1: Employee Information and Attestation section for self identification and employment authorization for Form I-9. If you are a person that assisted the employee in the completion of the Form I-9 information, enter your name and address in the Preparer and/or Translator Certification section of this page.
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.

Page Name	Definition Name	Usage
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.

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.

(Employee) Employment Eligibility Verification Page, Section 1. Employee Information and Attestation

Employees use the Employment Eligibility Verification page (HR_I9_EE), Section 1: Employee Information and Attestation to complete self identification and employment authorization for Form I-9. If you are a person that assisted the employee in the completion of the Form I-9 information, enter your the name and address in the Preparer and/or Translator Certification section of this page.

Navigation:

Self Service > **Personal Information** > **Form I-9** > **Employment Eligibility Verification**

This example illustrates the fields and controls on the Employment Eligibility Verification page, Section 1. Employee Information and Attestation (1 of 3).

This example illustrates the fields and controls on the Employment Eligibility Verification page, Section 1. Employee Information and Attestation (2 of 3).

This example illustrates a portion of the fields and controls on the Employment Eligibility Verification page, Supplement A, Preparer and/or Translator Certification for Section 1 (3 of 3). Although not shown here, you can add up to four preparers and/or translators.

Employees, preparers, or translators use this page to complete and submit the Section 1 information of the Form I-9 for the employee. Employees can complete and submit more than one Form I-9 but cannot modify the Form I-9 after submission and can view the most recent submission only.

Fields and links on this page are editable only when you are entering or completing a Form I-9. If the Form I-9 has been submitted into the system, this page is display only but contains a link to the I-9 instructions for the employee. However, if the form has already been completed and submitted, the page displays a **Select** button that you select to open up the fields and complete a new form.

Note: The information you enter on this page is for I-9 purposes only and does not update other HR data stored in the system.

Field or Control	Description
Start Over button	Select this button to clear all the fields on this page and start over.
Instructions link	Click this link to open a new browser window that contains a PDF of the instructions for completing the Form I-9.
Select	This button is available when you have already submitted I-9 verification data. Select this button to enable the page for data entry and submit a new Form I-9.

Section 1. Employee Information And Attestation

Use this section to enter the employee's name, address, birth date, U.S. social security number, and contact information.

Field or Control	Description
Other Last Names Used (if any)	Enter the maiden or other names, if applicable. When more than one name exists, separate the names by a semicolon (;).
Employee's E-mail Address and **Employee's Telephone Number**	Enter the appropriate contact information.
Citizenship or immigration status group box	Select the option for your eligibility type. You must select one of the options and provide any additional data that is associated with the selected option. Options are: 1. **A citizen of the United States**: Select this option if you are a citizen of the United States. 2. **A noncitizen national of the United States (See Instructions)**: Select this option if you are a noncitizen national of the United States. 3. **A lawful permanent resident**: Select this option if you are a conditional resident and have received legal permanent residency in the United States. By selecting this option, the **(Enter USCIS or A-Number.)** field within this group box becomes available for entry. 4. **An alien authorized to work until (exp. date, if any)**: Select this option when you are noncitizen but have been granted authorization to work in the United States and enter the date that your employment authorization expires, if any. By selecting this option, the remaining fields within this group box become available for entry. **Note:** Noncitizens authorized to work *must enter one* of the following to complete Section 1: 1. USCIS A-Number 2. Form I-94 Admission Number 3. Foreign Passport Number and the Country of Issuance
(Enter USCIS or A-Number.)	Enter your lawful permanent resident number or USCIS number. This field is mandatory if you select the option stating that you are a lawful permanent resident.

Field or Control	*Description*
until (expiration date, if applicable, mm/dd/yyyy) (month/day/year)	This field is available when you select that you are an noncitizen authorized to work. Enter the date until which you are authorized to work. There are certain types of work authorizations that do not expire - e. g. refugees or asylees. Therefore, if the expiration date does not apply, leave this field blank. **Note:** The printed form will display *N/A* in this field when the value is left blank.

Field or Control	*Description*
Signature of Employee	Select a signature type. Options include: • *<employee's name>*: The name is derived from the values entered in the Last Name, First Name, and Middle Initial fields. • *Minor Under Age 18* • *Special Placement*

Supplement A, Preparer and/or Translator Certification

The system requires this information only if you selected *Minor Under Age 18* or *Special Placement* in the **Signature of Employee** field.

Note: This section must be completed if any preparer and/or translator assists an employee in completing Section 1 of Form I-9. You can add up to four preparers and/or translators.

Field or Control	*Description*
Signature of Preparer of Translator	Enter the preparer's signature.
Last Name (Family Name) and **First Name (Given Name)**	Enter the preparer's first and last name in these fields. These fields are required.
Address (Street Number and Name), City or Town, State, and **Zip Code**	Enter the preparer's address information in these fields. These fields are required.

Field or Control	Description
Submit button	Select this button to save and submit this form, trigger appropriate workflow notifications to the administrator, and generate the confirmation page. When you select this button, the system will prompt you to perform a check. Select **Yes** to perform the check.

(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 details:

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

Video: Image Highlights, PeopleSoft HCM Update Image 49: Preferred Name

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

For information on setting up and working with approvals, see "Understanding Approvals" (Application Fundamentals) and "Setup Process Definitions Page" (Approval Framework).

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. 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 or update 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 or update your list of 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.

Page Name	Definition Name	Usage
Social Media (Summary) Page	HR_EE_SOC_MEDIA_FL	Review or update your social media accounts.
Social Media (Detail) Page	HR_SOC_MEDIA_SCF	Add, update, or delete social media accounts on your personal profile.
Marital Status Page	W3EB_SEL_EVNT_FLU (if eBenefits is active) HR_EE_MARITAL_FL (if eBenefits is not active)	Enter a marital status change.
Name (Summary) Page	HR_EE_NAME_FL	View your current name and any pending name change requests
Name (Detail) Page	NAME_DFT_SCF	Enter name change information and view or add attachments that may support the update.
Gender Identity Page	HR_EE_GENDER_FL	View a summary or initiate an update to 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 or update 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, or review the date on which you submitted your Form I-9.

Page Name	Definition Name	Usage
(USA) Employment Eligibility Verification Page, Section 1. Employee Information and Attestation	HR_I9_SEC1_FL	Complete the Section 1: Employee Information and Attestation section for self identification and employment authorization of the Form I-9 using Fluid.
USCIS Form I-9 - Submit Confirmation Page	EO_SUBMIT_CONFIRM	View a confirmation that you have successfully submitted the Form I-9. See "(USA) Managing I-9 Information Using Fluid" (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.
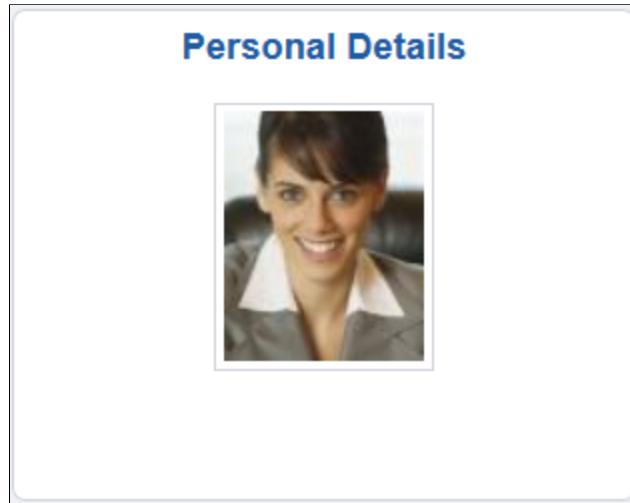
This example illustrates the Personal Details tile displaying the *Action Required* message. This message appears when an employee working in the U.S. needs to submit I-9 form information.
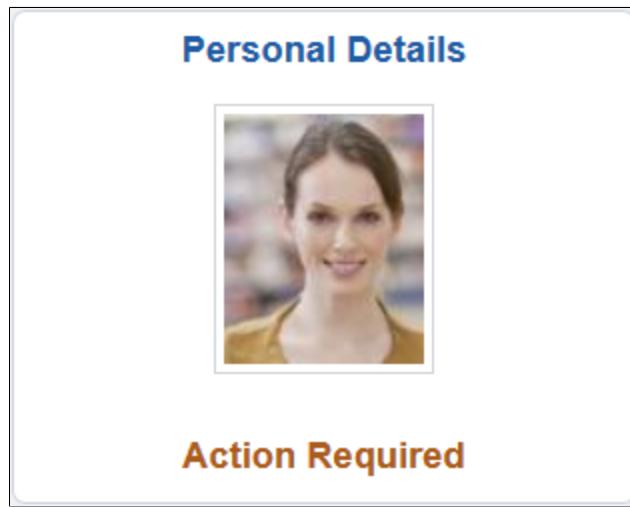
Depending upon the system setup and personal preferences, the picture may display a default photo.

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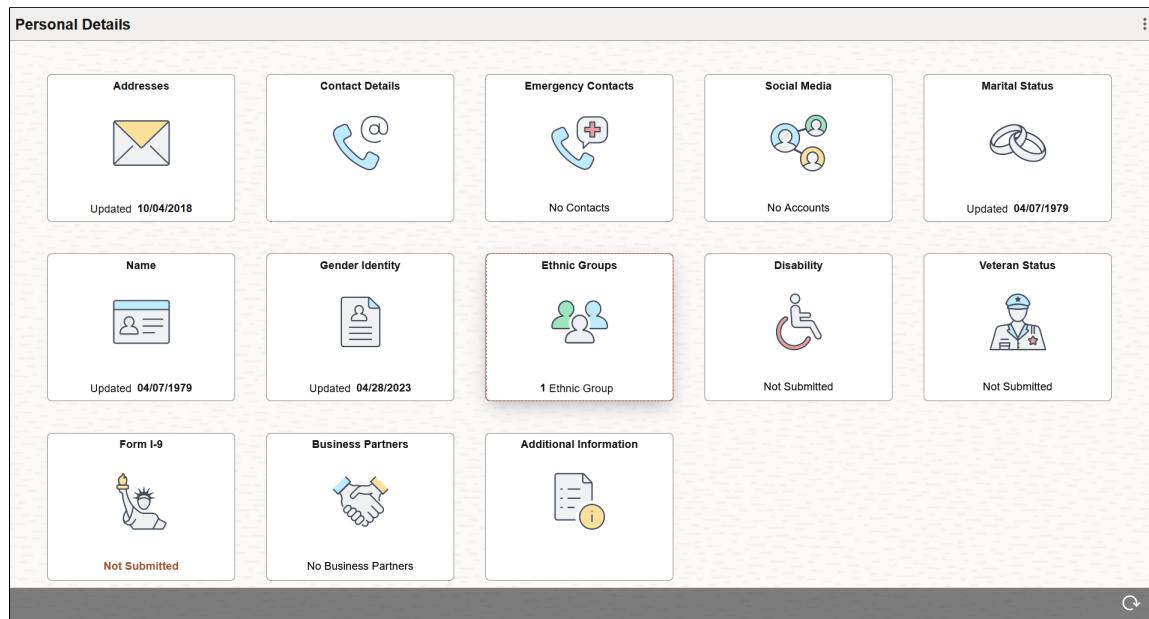
Video: Image Highlights, PeopleSoft HCM Update Image 34: Self-Service Navigation Updates

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 Buffalo, NY 74940	Current		›
Mailing Address			
643 Robinson St 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.
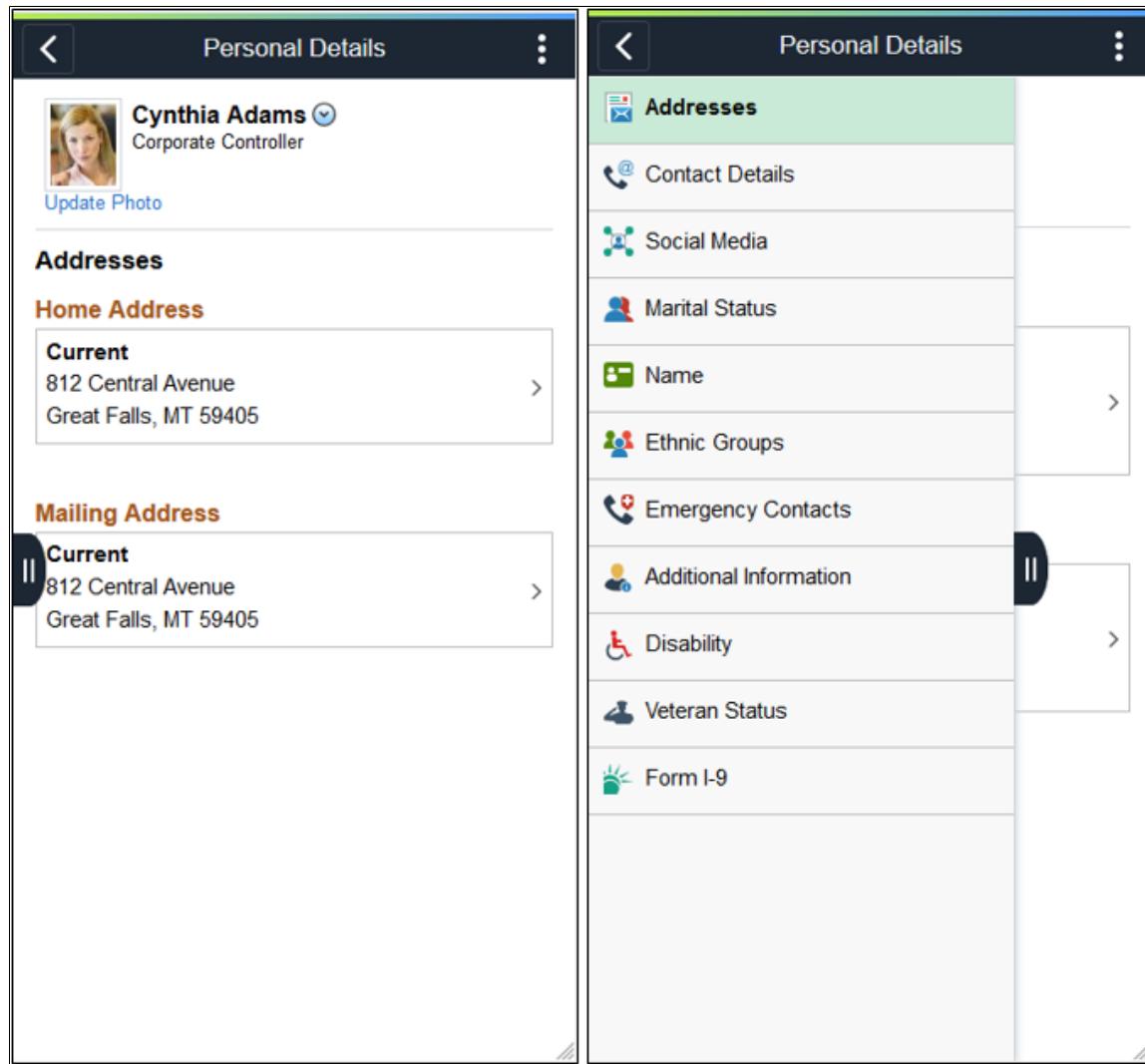
The Personal Details navigation collection page consists of the following panels and sections:

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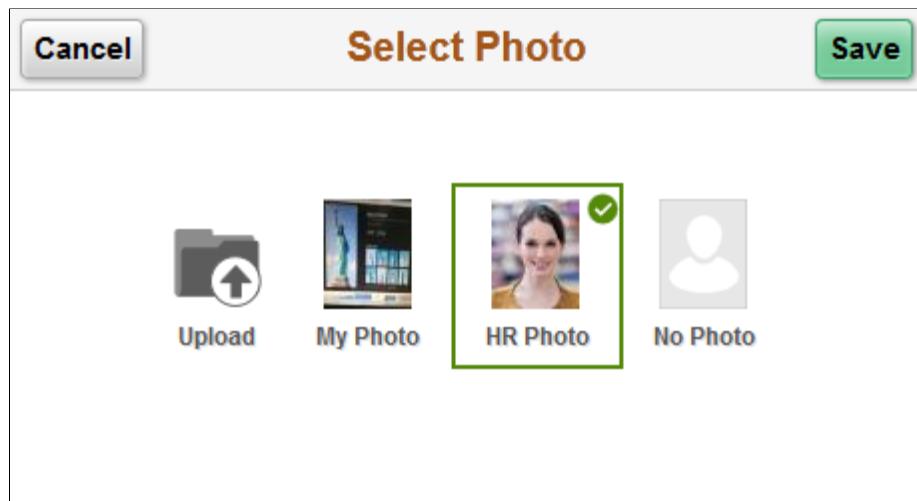
Use these option to choose the photo for pages that display an employee photo throughout the system:

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 Great Falls, MT 59405	Current		›
1962 Harrison St Great Falls, MT 59405	As of 04/28/2023	Submitted for Approval	
Mailing Address			
812 Central Avenue Great Falls, MT 59405	Current		›
Business Address			
4500 Corporate Lane 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. 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. 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.

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 or update 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.

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

Social Media (Detail) Page

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

Navigation:

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

- Select the **Add Social Media** button to create a new social media account.

This example illustrates the Social Media (detail) page.
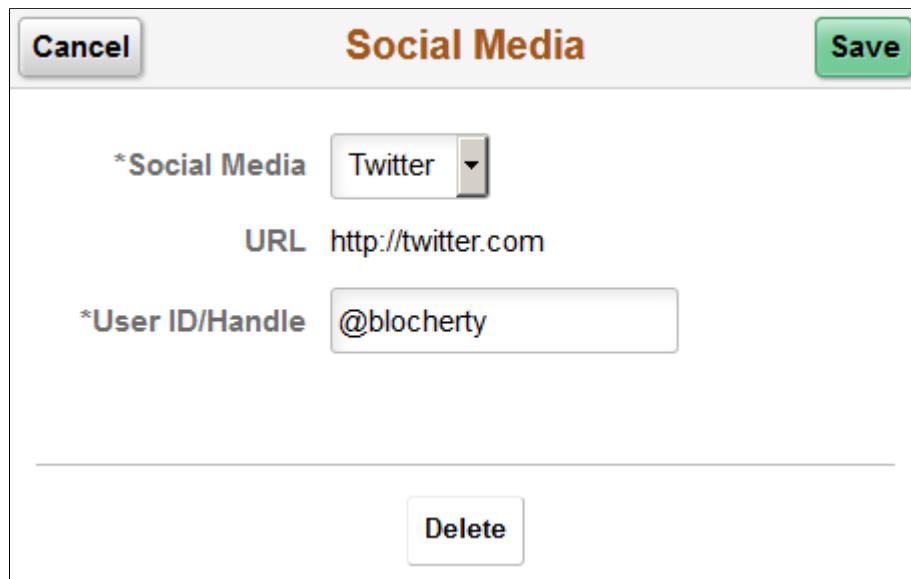
Use this page to add, update, or delete your social media accounts. Unlike other pages in the Personal Details pages, this does not update information stored in HR Personal Data pages.

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). 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 using 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 <u>Name (Detail) Page</u>.

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 <u>Name (Summary) Page</u>.

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 or initiate update to 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.

‹ Personal Details		Gender Identity			🏠 🔍 ⋮ ⊘

Mei Lee
Accountant

Gender Details

Gender	Birth Sex	Pronoun	Sexual Orientation	Gender Identity	Status	Approval Status	
Female	Male	Ze/Zir/Zirs	Pansexual	Non Binary	Current		›

These videos provide an overview of the gender identity functionality:

Video: <u>Image Highlights, PeoleSoft HCM Update Image 41: Gender Identity and Expression</u>

Video: <u>PeopleSoft Gender Identity and Expression</u>

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. **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. 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 <u>Gender Details Page</u> to update and submit updated information about your gender identity. **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.
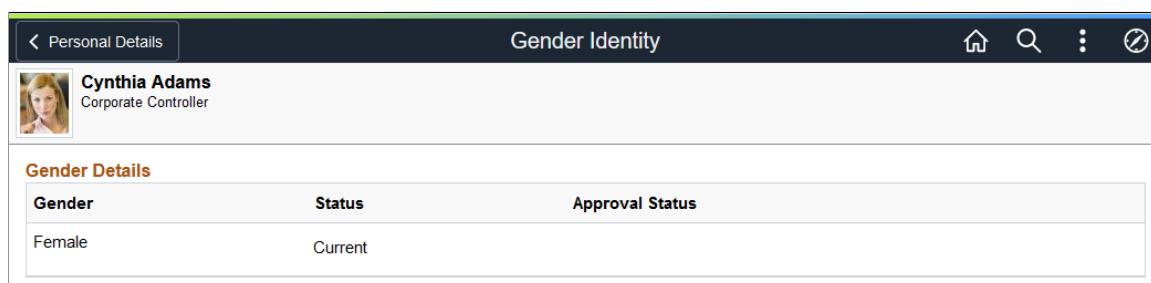
Gender Details Page

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 Gender Identity Page.

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. 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. 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
 <gender field label> List Information icon	Select this icon to access the "<Gender Field Label> Values Page" (PeopleSoft Human Resources Administer Workforce) and view descriptions of values for gender-related fields. **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. 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)). 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. 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. 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 or update 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).

Ethnic Groups

1) Are you Hispanic or Latino?   Explain

    ○ Yes

    ◉ No

2) What is your race? Select one or more.   Explain

    ☐ American Indian or Alaska Native

    ☐ Asian

    ☐ Black or African American

    ☐ Native Hawaiian or Pacific Islander

    ☑ White

The employer is subject to certain governmental recordkeeping and reporting requirements for the administration of civil rights laws and regulations. In order to comply with these laws, the employer invites employees to voluntarily self-identify their race or ethnicity. Submission of this information is voluntary and refusal to provide it will not subject you to any adverse treatment. The information obtained will be kept confidential and may only be used in accordance with the provisions of applicable laws, executive orders, and regulations, including those that require the information to be summarized and reported to the federal government for civil rights enforcement. When reported, data will not identify any specific individual.

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.

Ethnic Groups

    +

White   >

Voluntary Self-Identification

The employer is subject to certain governmental recordkeeping and reporting requirements for the administration of civil rights laws and regulations. In order to comply with these laws, the employer invites employees to voluntarily self-identify their race or ethnicity. Submission of this information is voluntary and refusal to provide it will not subject you to any adverse treatment. The information obtained will be kept confidential and may only be used in accordance with the provisions of applicable laws, executive orders, and regulations, including those that require the information to be summarized and reported to the federal government for civil rights enforcement. When reported, data will not identify any specific individual.

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:

75

• 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. 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.

How Do You Know if You Are a Veteran Protected by VEVRAA?

This section includes a set of options to identify if you are a protected veteran or not by selecting one of the radio button options. To understand the options, select the **"Am I a Protected Veteran"** link in the text at the top of this section or view the **What Categories of Veterans Are "Protected" by VEVRAA?** section that follows.

The system will automatically enter your name and today's date.

When you submit the veteran status information, the system updates the military status data in Person Data - "(USA and USF) Work Status Page" (PeopleSoft Human Resources Administer Workforce).

What Categories of Veterans Are "Protected" by VEVRAA?

This section provides explanatory text to help understand the different categories of protected veteran.

(USA) Form I-9 Page

Use the Form I-9 page (HR_I9_EE_FL) to access the I-9 instructions PDF, access the Form I-9 page (HR_I9_EE) where you enter personal employee eligibility information, or 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 may display various statuses indicating if action needs to be taken or the status of the I-9.

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 and approval is required.

This example illustrates the Form I-9 page when you have already submitted the form and approval is not required.

This example illustrates the Form I-9 page the day after you have already submitted the form when Approvals is not enabled.

Note: When using Approvals, if an I-9 request is pushed back, this page will display a warning that you need to select the Edit Form I-9 link and correct your entries.

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	This is available when you need to submit the Form I-9. Select to access the (USA) Employment Eligibility Verification Page, Section 1. Employee Information and Attestation to enter and submit I-9 information as the employee.
View Form I-9	This is available when you have already submitted I-9 verification data. Select to view the Employment Eligibility Verification page in another browser window as a display only PDF.
Edit Form I-9	This is available the same day you have submitted I-9 verification data and Approvals is not enabled. Select to access the Employment Eligibility Verification page to make corrections to the I-9 and resubmit the form.

Field or Control	Description
Submit New Form I-9	This is available after you entered your I-9 information previously or, when Approvals is enabled, after a form has been approved. Select to enter and submit new I-9 information.
View Approval Chain	This is available when Approvals is enabled and it is awaiting approval. Select to view the approval status.

(USA) Employment Eligibility Verification Page, Section 1. Employee Information and Attestation

Employees use the Employment Eligibility Verification page (HR_I9_EE_FL), Section 1: Employee Information and Attestation to complete self identification and employment authorization for Form I-9.

If you are a person that assisted the employee in the completion of the Form I-9 information, enter your the name and address in the **Preparer and/or Translator Certification** section of this page.

Navigation:

Employee Self Service homepage > **Personal Details tile**, then select the **Submit Form I-9**, **Edit Form I-9**, or **Submit New Form I-9** option on the (USA) Form I-9 Page.

This example illustrates the fields and controls on the Fluid Employment Eligibility Verification page, Section 1. Employee Information and Attestation (1 of 3).

This example illustrates the fields and controls on the Fluid Employment Eligibility Verification page, Section 1. Employee Information and Attestation (2 of 3).

This example illustrates a portion of the fields and controls on the Fluid Employment Eligibility Verification page, Supplement A, Preparer and/or Translator Certification for Section 1 (3 of 3).

Employees, preparers, or translators use this page to complete and submit the Section 1 information of the Form I-9 for the employee.

Note: The information you enter on this page is for I-9 purposes only and does not update other HR data stored in the system.

Field or Control	Description
Start Over button	Select this button to clear all the fields on this page and start over.
Instructions link	Select this link to open a new browser window that contains a PDF of the instructions for completing the Form I-9.

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Section 1. Employee Information And Attestation:

Use this section to enter the employee's name, address, birth date, U.S. social security number, and contact information.

Field or Control	Description
Other Last Names Used (if any)	Enter the maiden or other names, if applicable. When more than one name exists, separate the names by a semicolon (;).
Employee's E-mail Address and **Employee's Telephone Number**	Enter the appropriate contact information.

Employee Attestation

Field or Control	Description
Citizenship or immigration status group box	Select the option for your eligibility type. You must select one of the options and provide any additional data that is associated with the selected option. Options are: 1. **A citizen of the United States**: Select this option if you are a citizen of the United States. 2. **A noncitizen national of the United States (See Instructions)**: Select this option if you are a noncitizen national of the United States. 3. **A lawful permanent resident**: Select this option if you are a conditional resident and have received legal permanent residency in the United States. By selecting this option, the **Alien Registration Number** field within this group box becomes available for entry. 4. **An alien authorized to work until (exp. date, if any)**: Select this option when you are noncitizen but have been granted authorization to work in the United States and enter the date that your employment authorization expires, if any. By selecting this option, additional fields within this group box become available for entry.

Field or Control	Description
Alien Authorization Date	This field is available when you select that you are an alien authorized to work. Enter the date until which you are authorized to work. There are certain types of work authorizations that do not expire - e. g. refugees or asylees. Therefore, if the expiration date does not apply, leave this field blank. **Note:** The printed form will display *N/A* in this field when the value is left blank.
Identification	This field is available when you select the noncitizen option. Noncitizens authorized to work *must enter one* of the options to complete Section 1: -- *Foreign Passport Number and the Country of Issuance* -- *Form I-94 Admission Number* -- *USCIS A-Number* When you select one of the options, an additional field is available for entry. Enter the corresponding information that related to the identification you specified.
Signature of Employee	Select a signature type. Options include: • *<employee's name>*: The name is derived from the values entered in the Last Name, First Name, and Middle Initial fields. • *Minor Under Age 18* • *Special Placement*

Attachments

Use this section to upload supporting documentation for the I-9.

Preparer and/or Translator Certification - Supplement A

The system requires this information only if you selected *Minor Under Age 18* or *Special Placement* in the **Signature of Employee** field.

Note: This section must be completed if any preparer and/or translator assists an employee in completing Section 1 of Form I-9. You can add up to four preparers and/or translators.

Field or Control	Description
I did not use a preparer or translator	Select to indicate that you completed the Form I-9 without assistance. Deselect this option if you used a preparer or translator. The remaining fields in this section must be completed if any preparer and/or translator assists an employee in completing Section 1 of Form I-9.
A preparer(s) and/or translator(s) assisted the employee in completing Section 1.	Select this option to indicate the number of preparers or translators that assisted. This opens the remaining fields in this section for entry.
How Many	This field appears when you select the **A preparer(s) and/or translator(s) assisted the employee in completing Section 1.** option. You can add up to four (4) preparers and/or translators.
Signature of Preparer of Translator	Enter the preparer's signature.
Last Name (Family Name) and **First Name (Given Name)**	Enter the preparer's first and last name in these fields. These fields are required.
Address (Street Number and Name), City or Town, State, and **Zip Code**	Enter the preparer's address information in these fields. These fields are required.
Submit button	Select this button to save and submit this form, trigger appropriate workflow notifications to the administrator, and generate the confirmation page. When you select this button, the system will prompt you to perform a check. Select **Yes** to perform the check.

Submit

Field or Control	Description
Submit button	Select this button to save and submit this form, trigger appropriate workflow notifications to the administrator [see "Verify/Reverify Form I9 Page - Section 2. Employer Review and Verification " (PeopleSoft Human Resources Administer Workforce)"Verify/Reverify Form I9 Page - Supplement B, Reverification and Rehire (formerly Section 3)" (PeopleSoft Human Resources Administer Workforce)].

Related Links

"(USA) Managing I-9 Information Using Fluid" (PeopleSoft Human Resources Administer Workforce)

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.

(Fluid) Managing Remote Worker Requests as an Employee

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

Video: Image Highlights, PeopleSoft HCM Update Image 51: Restrict Remote Worker Type by Job Code/ Position and Limit Retroactive Requests

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.

Page Name	Definition Name	Usage
(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.
(Employee) Home Address or Mailing Address Page (see <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*
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. Navigating to another page saves the data you entered on that page. The button is not visible on the first step in the request.
Next ❯ Next button	Click this button to navigate to the next page. Navigating to another page saves the data you entered on that page. 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" (PeopleSoft Human Resources Administer Workforce) only. **Note:** Your request will remain in *Draft* status until you click the **Submit** button. 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" (PeopleSoft Human Resources Administer Workforce) to take action on a request. This video provides an overview of Fluid Approvals: 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 you meet the remote work eligibility rules for your job, position, or override settings.

For more information on eligibility rules, see"Understanding Remote Work Eligibility for Employee Requests" (PeopleSoft Human Resources Administer Workforce).

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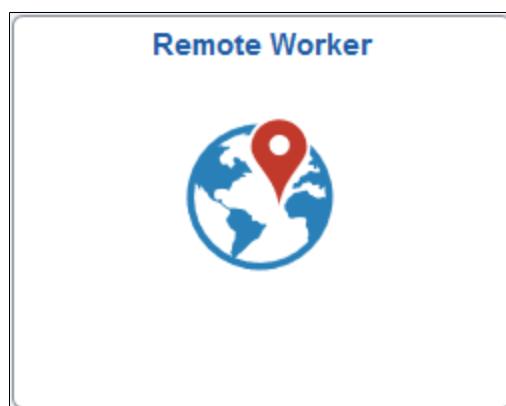
Select this tile to access the "Remote Worker Request Page" (PeopleSoft Human Resources Administer Workforce) in fluid and review or initiate a remote worker request for yourself.

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

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 for Fluid" (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 Wilmington, DE 19880	Current	>
Mailing Address		
801 N. King Street 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.
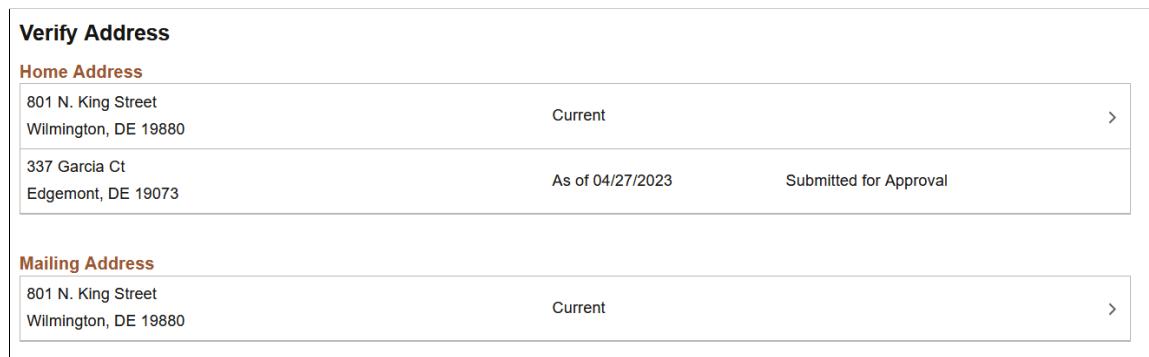
Verify Address			
Home Address			
801 N. King Street Wilmington, DE 19880	Current		>
337 Garcia Ct Edgemont, DE 19073	As of 04/27/2023	Submitted for Approval	
Mailing Address			
801 N. King Street Wilmington, DE 19880	Current		>

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. Select a row to open the <u>\<Type\> Address (Detail) Page</u> and enter a new home or mailing address. <hr> **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 <u>(Fluid) Reviewing and Updating Personal Information</u>).

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 for Fluid" (PeopleSoft Human Resources Administer Workforce)

(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

Viewing Career Snapshot

Understanding and Accessing the Career Snapshot Pages and Tiles

The employee Career Snapshot feature provides employees a comprehensive view of their career and talent data using dashboards and tiles within the PeopleSoft Fluid User Interface pages. With Career Snapshot, employees have access to this data from one location instead of accessing several components separately. As delivered, employees can access the Career Snapshot dashboards and pages from the Career Snapshot tile.

This video demonstrates the Fluid Career Snapshot feature:

Video: Image Highlight, PeopleSoft HCM Update Image 52: Career Snapshot in Employee Self Service

These topics give an overview of configuring and accessing the Career Snapshot tile and dashboards and discusses accessing Career Snapshot.

Pages Used to Access the Career Snapshot Pages and Tiles

Page Name	Definition Name	Usage
Career Snapshot Tile	HC_HCTS_CAREERSNAP (this is the cref for the tile)	Access a group of dashboards and tiles to see a comprehensive view of your talent data.
Career Snapshot Layout	N/A	View dashboards that display your employment and talent data.
View Another Job Page	HCTS_JOBS_SEL_FL	Select the job for which you want to view career snapshot data.

Configuring and Accessing Career Snapshot

While Career Snapshot is delivered ready to use, the PeopleSoft system enables administrators to determine items and date ranges for displaying snapshot data. This includes displays for dashboard content as well as configuring profiles, projects, documents, and other career data.

For more information on configuring Career Snapshot, see the "Managing Snapshot Dashboards and Tiles" (PeopleSoft eProfile Manager Desktop) and "Configuring Snapshot Content Displays" (PeopleSoft eProfile Manager Desktop) topics.

Understanding Security Access to the Dashboards and Tiles

The Career Snapshot tile is an optional tile users can add to their Employee Self Service homepage, or any other homepage, using the Personalize Homepage option.

To add and access this tile, users must be assigned the *Talent Summary Employee Fluid* role.

Career Snapshot Tile

Use the Career Snapshot tile to access a group of dashboards and tiles to see a comprehensive view of your talent data.

Navigation:

The Career Snapshot tile is not delivered to appear on a homepage. You can add the tile, through personalization, to a homepage of your choice.

Note: You must be assigned the *Talent Summary Employee Fluid* role to add and access this tile.

This example illustrates the Career Snapshot tile.
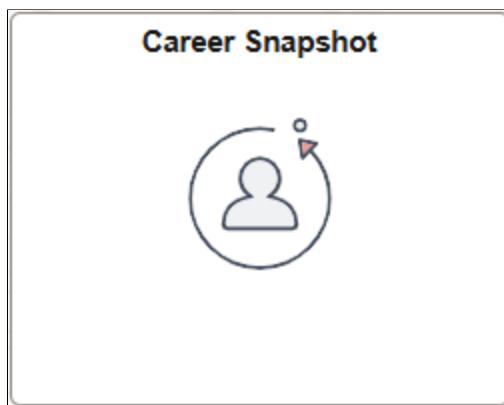
Select this tile to access the Career Snapshot dashboards.

Career Snapshot Layout

Use Career Snapshot to view dashboards that display your employment and talent data.

Navigation:

Select the Career Snapshot Tile from the homepage you added the tile.

This example illustrate the Career Snapshot layout and content.
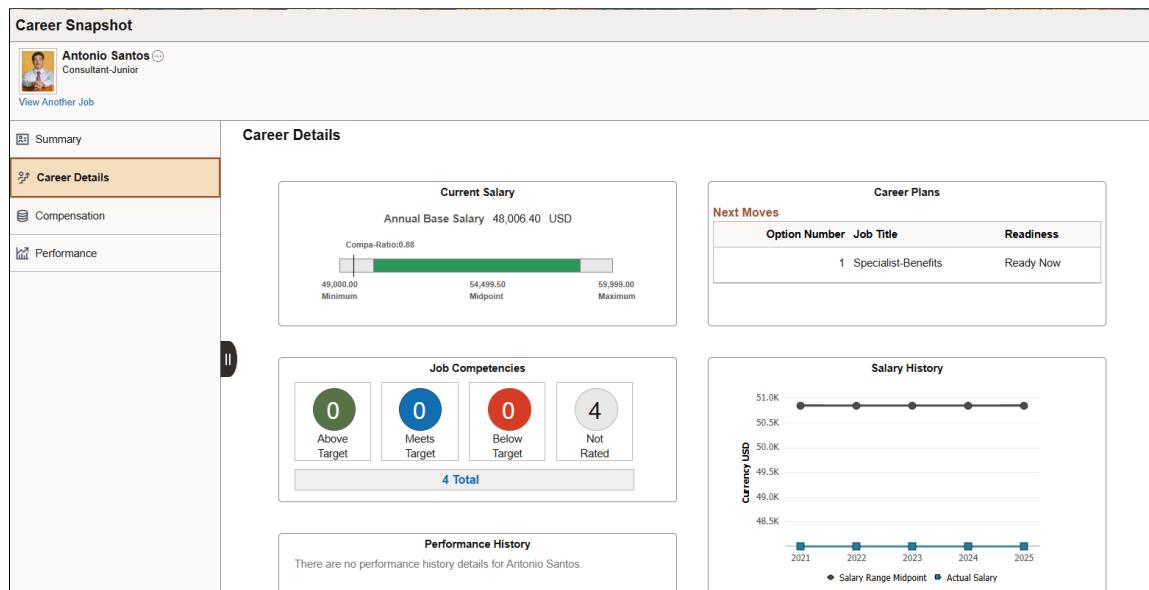
Career Snapshot Layout

The Career Snapshot page appears in a three panel layout.

- The top panel displays the header and includes the user's name, job title, and the Related Actions menu icon, where you can access other self service transactions for yourself, if applicable.

    If you work multiple jobs, the page will display the **View Another Job** link to access the View Another Job Page to review snapshot data related to one of your jobs.

- The left panel lists the various dashboard categories delivered with Career Snapshot. When using a small form factor, such as a phone, this panel is collapsed when you view Career Snapshot dashboards. Select the tab to open the category list and change dashboard views.

- The right main panel displays the employee content dashboard. Fluid dashboards are PeopleSoft pages that aggregate and display tiles that share a common or similar purpose. These dashboard pages provide quick access to useful information by presenting concise but feature-rich tiles. These tiles can vary in function and complexity, enabling you to see not only an overview, but to drill into your data to access detailed information.

Delivered Career Snapshot Dashboards and Tiles

The PeopleSoft HCM application delivers these Career Snapshot dashboards and tiles, to manage and analyze information about your talent data:

Dashboard	Description	Tiles
Career Snapshot - Summary Dashboard	See a high level overview of data related to your work and skills.	• Performance • Compensation • Job Details • Job Competencies • Personal Competencies • Licenses and Certifications • Responsibilities • Honors and Awards • Job Interests • Education • Career Plans • Recognitions
Career Snapshot - Career Details Dashboard	Review details about your career, such as career plans.	• Current Salary • Career Plans • Job Competencies • Salary History • Performance History • Job Interests • Personal Competencies • Job History
Career Snapshot - Compensation Dashboard	Review your compensation data.	• Current Salary • Bonus Earnings • Salary History • Performance History • Total Rewards

Dashboard	Description	Tiles
Career Snapshot - Performance Dashboard	View your talent-related information and overall performance.	• Performance History • Responsibilities • Special Projects • E&G Special Projects • Personal Competencies • Licenses and Certifications • Job Competencies • Recognitions

View Another Job Page

Use the View Another Job page (HCTS_JOBS_SEL_FL) to select the job for which you want to view career snapshot data.

Note: This page is available only for employees that hold multiple jobs.

Navigation:

Select the **View Another Job** link from the Career Snapshot dashboards.

This example illustrates the fields and controls on the View Another Job page.

This page lists all the multiple jobs held by an employee. Use this page to select a job and switch the career snapshot view to examine data related to that job.

Viewing the Career Snapshot - Summary Tiles and Pages

When employees access the Career Snapshot, the system displays the Summary dashboard by default. The Summary dashboard displays tiles with a variety of high level information you can quickly review in regards to your professional career and skills.

This topic discusses and lists the Career Snapshot - Summary tiles and pages for the employee.

Pages Used to View the Career Snapshot - Summary Tiles and Pages

Page Name	Definition Name	Usage
Career Snapshot - Summary Dashboard	PT_LANDINGPAGE	Access a variety of high level summary tiles about your employment and career.
"Performance (Summary) Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_PERF_SUM1_FL	View your overall rating from the last performance period.
"Performance History Page" (PeopleSoft eProfile Manager Desktop)	HCTS_PERFHIST_FL HCTS_PERFHIST_SCF	Review the overall ratings for your past performance periods using either a chart or table grid.
"Compensation (Summary) Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_CMP_SAL1_FL	View your current base salary and when it was last changed.
"Compensation: Current Salary Page" (PeopleSoft eProfile Manager Desktop)	HCTS_COMP_SALRY_FL	View your salary range for your job and where you fall within that range.
"Compensation: Salary History Page" (PeopleSoft eProfile Manager Desktop)	HCTS_COMP_SALRY_FL	View a quick summary of your compensation history.
"Compensation History Page" (PeopleSoft eProfile Manager Desktop)	HCTS_COMP_HIST_SCF	Review or verify your compensation history.
"Salary Change Details Page" (PeopleSoft eProfile Manager Desktop)	HCTS_COMP_VC_SCF	View details of a specific salary change.
"Compensation: Total Rewards Page" (PeopleSoft eProfile Manager Desktop)	HCTS_COMP_SALRY_FL HCTS_CMP_TRW_SBF	Review your total rewards data.
"Total Rewards Page" (PeopleSoft Human Resources Administer Compensation)	TRW_SS_STMT_FL	Review your earnings, benefits, and other compensation information for a select review period.
"Job Details (Summary) Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_JOBDTL_SUM_FL	View your years of service and time in the current job.
"Job Details: Job Information Page" (PeopleSoft eProfile Manager Desktop)	HCTS_JOBDTL_SUM_FL	Review detailed information about your current job.
"Job Details: Job History Page" (PeopleSoft eProfile Manager Desktop)	HCTS_JOB_DTLS_FL	View a summary of your job history.

Page Name	Definition Name	Usage
"Job Competencies (Summary) Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_JOBCOMP1_FL	Note the number of competencies where your profile rating is above or below the target for the your job
"Job Competencies Page" (PeopleSoft eProfile Manager Desktop)	HCTS_JOBCOMPDT_FL HCTS_JOBCOMPDTL_FL	Review a list of competencies associated with your job (non-person) profile compared to the your (person) profile.
"Job Competency Details Page" (PeopleSoft eProfile Manager Desktop)	JPM_ITM_DTL_FL	View the details of your rating for a job competency.
"Personal Competencies (Summary) Tile" (PeopleSoft eProfile Manager Desktop)	HC_HCTS_PERS_COMP1_FL	View the total number of competencies associated with your (person) profile, but not your job (non-person) profile.
"Personal Competencies Page" (PeopleSoft eProfile Manager Desktop)	HCTS_PERS_COMP_FL	View a complete list of competencies associated with your profile, but not your job (non-person) profile.
"Personal Competency Details Page" (PeopleSoft eProfile Manager Desktop)	JPM_ITM_DTL_FL	View additional details about your competency ratings.
Talent Profile Page (see "Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers)" (PeopleSoft eDevelopment))	JPM_PERS_PROFL_FLU	View and update your talent profile data in fluid.
"Licenses and Certifications (Summary) Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_LICENSE_FL	View the number of current, expiring, or missing licenses and certifications you hold.
"Licenses and Certifications Page" (PeopleSoft eProfile Manager Desktop)	HCTS_LICENSE1_FL HCTS_LICENSE_SCF	View your licenses and certifications.
"Licenses and Certifications Details Page" (PeopleSoft eProfile Manager Desktop)	JPM_ITM_DTL_FL	View additional details about a license or certification your hold.
"Responsibilities (Summary) Tile" (PeopleSoft eProfile Manager Desktop)	HC_HCTS_RESP_SUM1_FL	Note the number of responsibilities you have been assigned.
"Responsibilities Page" (PeopleSoft eProfile Manager Desktop)	HCTS_RESP1_FL HCTS_RESP_FL	Review a list of responsibilities you have been assigned.

Page Name	Definition Name	Usage
"Responsibilities Details Page" (PeopleSoft eProfile Manager Desktop)	JPM_ITM_DTL_FL	View additional details about your assigned responsibilities.
"Honors and Awards (Summary) Tile" (PeopleSoft eProfile Manager Desktop)	HC_HCTS_HONAW_SUM1_FL	View the total number of honors and awards you have recorded.
"Honors and Awards Page" (PeopleSoft eProfile Manager Desktop)	HCTS_HONORS_FL	Review a list of recorded honors and awards you have received.
"Honors and Awards Details Page" (PeopleSoft eProfile Manager Desktop)	JPM_ITM_DTL_FL	View additional details about one of your honors or awards.
"Job Interests (Summary) Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_JOBIN_SUM1_FL	See a job, as well as a count of the number of jobs, in which you have expressed interest.
"Job Interests Page" (PeopleSoft eProfile Manager Desktop)	HCTS_JOB_INT1_FL	Review a list of jobs in which you have expressed interest.
Job Profile Page [see "My Job Profiles Page (for Employees), View Job Profiles Page (for Employees), and Maintain Job Profiles Page (for Managers)" (PeopleSoft eDevelopment)]	JPM_NPERS_PROFL_FL	Review or update a job profile using the Profile Management system.
"Education Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_EDUCATION1_FL_GBL	See the most recent education level you have recorded and a number count of all your other degrees and school levels.
"Education Page" (PeopleSoft eProfile Manager Desktop)	HCTS_EDUCATION_FL	See the school education levels attended and degrees you've completed.
"Education Details Page" (PeopleSoft eProfile Manager Desktop)	JPM_ITM_DTL_FL	View details about your education level or degrees obtained.
"Career Plans (Summary) Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_CAREERPLN1_FL_GBL	View the next step in your career path. The tile will also list the number of other specified career path options.
"Career Plans Page" (PeopleSoft eProfile Manager Desktop)	HCTS_CAREERPLN_FL	Review a list of all career path options defined for you.
"Career Move Details Page" (PeopleSoft eProfile Manager Desktop)	HCTS_CP_ADMPTH_SCF	View additional details about a career move.

Page Name	Definition Name	Usage
"Career Progression Chart Page" (PeopleSoft Human Resources Plan Careers and Successions)	HR_CP_PRO_CHART	View a graphical representation of your career paths and perform a competency gap/fit analysis.
"Recognitions (Summary) Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_RECOG_SUM_FL	View the number of recognitions you have received over the last 12 months.
"Recognitions Page" (PeopleSoft eProfile Manager Desktop)	HCTS_RECOG_LIST_FL	Review details of recognitions you have received.

Note: These pages and tiles are similar to those on the manager and administrator Employee Snapshots - Summary dashboard. For further information on these tiles and pages, see the "Viewing the Snapshot - Summary Tiles and Pages" (PeopleSoft eProfile Manager Desktop) documentation.

Career Snapshot - Summary Dashboard

Employees use the Career Snapshot - Summary dashboard (PT_LANDINGPAGE) to access a variety of high level summary tiles about their employment and career.

Navigation:

Select the Career Snapshot Tile from the homepage you added the tile.

Note: You must be assigned the *Talent Summary Employee Fluid* role to access the Career Snapshot dashboards.

This example illustrates the fields and controls on the Career Snapshot - Summary dashboard.
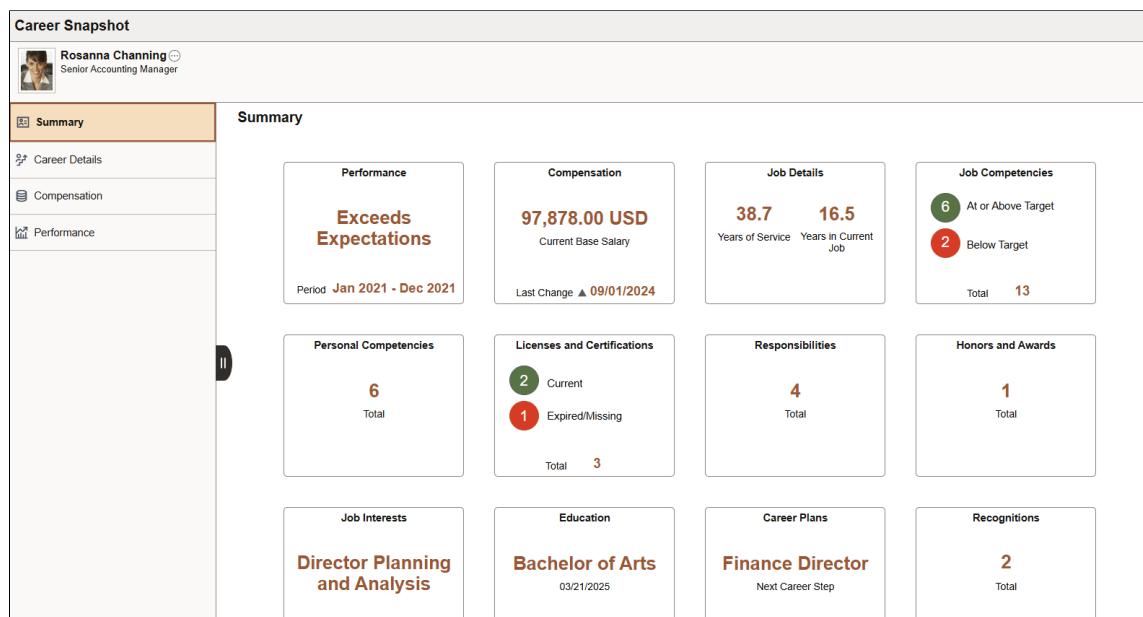
This example illustrates the fields and controls on the Career Snapshot - Summary dashboard for a person with multiple jobs.

These tiles are delivered by default with the **Summary** dashboard.

- "Performance (Summary) Tile" (PeopleSoft eProfile Manager Desktop)

- "Compensation (Summary) Tile" (PeopleSoft eProfile Manager Desktop)

- "Job Details (Summary) Tile" (PeopleSoft eProfile Manager Desktop)

- "Job Competencies (Summary) Tile" (PeopleSoft eProfile Manager Desktop)

- "Personal Competencies (Summary) Tile" (PeopleSoft eProfile Manager Desktop)

- "Licenses and Certifications (Summary) Tile" (PeopleSoft eProfile Manager Desktop)

- "Responsibilities (Summary) Tile" (PeopleSoft eProfile Manager Desktop)

- "Honors and Awards (Summary) Tile" (PeopleSoft eProfile Manager Desktop)

- "Job Interests (Summary) Tile" (PeopleSoft eProfile Manager Desktop)

- "Education Tile" (PeopleSoft eProfile Manager Desktop)

- "Career Plans (Summary) Tile" (PeopleSoft eProfile Manager Desktop)

- "Recognitions (Summary) Tile" (PeopleSoft eProfile Manager Desktop)

Note: These tiles are delivered by default to appear on the **Summary** dashboard page of Career Snapshot; however, the administrator can move the tiles to appear on other Career Snapshot dashboard folders. The navigation in the corresponding topics references the delivered navigation.

Field or Control	Description
View Another Job link	This link is available when you have multiple jobs. Select this link to access the <u>View Another Job Page</u> and change the Career Snapshot view to examine data related to another one of your jobs.

Viewing the Career Snapshot - Career Details Tiles and Pages

Employees use the Career Snapshot - Career Details dashboard to view tiles and pages that can aid in determining their career plans and progression.

This topic discusses and lists the Career Snapshot - Career Details tiles and pages for the employee.

Pages Used to View Career Snapshot - Career Details Tiles and Pages

Page Name	Definition Name	Usage
<u>Career Snapshot - Career Details Dashboard</u>	PT_LANDINGPAGE	Employees access tiles related to their promotion readiness and career planning.
"Current Salary Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_CMP_SALCUR_FL	View the salary range for your job and where you fall within that range.
"Compensation History Page (Fluid Employee View)" (PeopleSoft eCompensation Manager Desktop)	HR_EC_HIST_SS_FL	Review your own compensation history.
"Career Plans Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_CAREERPLN2_FL_GBL	View the next move in your career path.
"Career Plans Page" (PeopleSoft eProfile Manager Desktop)	HCTS_CAREERPLN_SCF	Review a list of all your defined career path options.
"Job Competencies Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_JOBCOMPSUM_FL	View a summary graphic of how your (primary person) profile matches the competencies associated with your job (primary non-person) profile.
"Job Competencies Page" (PeopleSoft eProfile Manager Desktop)	HCTS_JOBCOMPDTL_FL	Review a list of competencies associated with your job (non-person) profile compared to the your (person) profile.
"Job Competency Details Page" (PeopleSoft eProfile Manager Desktop)	JPM_ITM_DTL_FL	View the details of your rating for a job competency.

Page Name	Definition Name	Usage
"Salary History Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_CMP_SALHST_FL	View your compensation history in a graph.
"Salary History Details Page" (PeopleSoft eProfile Manager Desktop)	HCTS_CMP_SALHS_SCF	View your compensation history in a grid format.
"Performance History Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_PERFHIST2_FL	View a summary of current and historical performance documents.
"Performance History Page" (PeopleSoft eProfile Manager Desktop)	HCTS_PERFHIST_SCF	Review your overall ratings from past performance periods using a table grid.
"Job Interests Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_JOB_INT2_FL_GBL	View the job profiles in which you may have an interest.
"Personal Competencies Tile" (PeopleSoft eProfile Manager Desktop)	HC_HCTS_PERS_COMP2_FL	View a list of competencies associated with your (person) profile, that are not part of your job (non-person) profile.
"Personal Competencies Page" (PeopleSoft eProfile Manager Desktop)	HCTS_PERS_COMP_FL	View a complete list of competencies associated with your (person) profile, but not your job (non-person) profile.
"Personal Competency Details Page" (PeopleSoft eProfile Manager Desktop)	JPM_ITM_DTL_FL	View additional details about your competency rating for an item.
"Job History Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_JOB_HIST_FL	See the last two jobs you held.
"Job History Page" (PeopleSoft eProfile Manager Desktop)	HCTS_JOBHST_MDL_FL	View a complete list of your job history.

Note: These pages and tiles are similar to those on the (Manager and Administrator) Employee Snapshots - Promotion Readiness and Performance Review dashboards. For further information on these tiles and pages, see the corresponding documentation.

Related Links

"Viewing the Promotion Readiness and Career Details Tiles and Pages" (PeopleSoft eProfile Manager Desktop)
"Viewing the Career Planning Tiles and Pages" (PeopleSoft eProfile Manager Desktop)

Career Snapshot - Career Details Dashboard

Employees use the Career Snapshot - Career Details dashboard to access tiles related to their promotion readiness and career planning.

Navigation:

Select the Career Snapshot Tile from the homepage you added the tile and select the **Career Details** tab.

Note: You must be assigned the *Talent Summary Employee Fluid* role to access the Career Snapshot dashboards.

This example illustrates the Career Snapshot - Career Details dashboard.
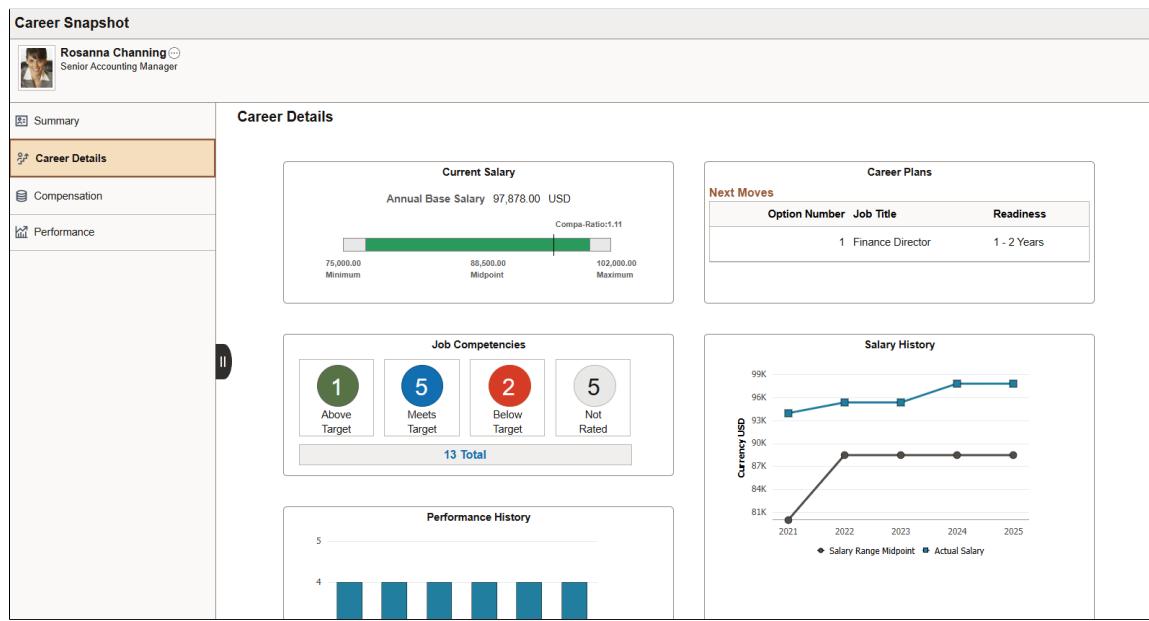
These tiles are delivered by default with the **Career Details** dashboard:

- "Current Salary Tile" (PeopleSoft eProfile Manager Desktop)

- "Career Plans Tile" (PeopleSoft eProfile Manager Desktop)

- "Job Competencies Tile" (PeopleSoft eProfile Manager Desktop)

- "Salary History Tile" (PeopleSoft eProfile Manager Desktop)

- "Performance History Tile" (PeopleSoft eProfile Manager Desktop)

- "Job Interests Tile" (PeopleSoft eProfile Manager Desktop)

- "Personal Competencies Tile" (PeopleSoft eProfile Manager Desktop)

- "Job History Tile" (PeopleSoft eProfile Manager Desktop)

Note: These tiles are delivered by default to appear on the **Career Details** dashboard page of Career Snapshot; however, the administrator can move the tiles to appear on other Career Snapshot dashboard folders. The navigation in the corresponding topics references the delivered navigation.

Field or Control	Description
View Another Job link	This link is available when you have multiple jobs. Select this link to access the <u>View Another Job Page</u> and change the Career Snapshot view to examine data related to another one of your jobs.

Viewing the Career Snapshot - Compensation Tiles and Pages

Employees use the Career Snapshot - Compensation dashboard to view tiles and pages that show data related to their compensation and aid in understanding how they are compensated.

This topic discusses and lists the Career Snapshot - Compensation tiles and pages for the employee.

Pages Used to View Career Snapshot - Compensation Tiles and Pages

Page Name	Definition Name	Usage
<u>Career Snapshot - Compensation Dashboard</u>	PT_LANDINGPAGE	Employees can access a variety of high level tiles about their compensation.
"Current Salary Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_CMP_SALCUR_FL	View the salary range for your job and where you fall within that range.
"Compensation History Page (Fluid Employee View)" (PeopleSoft eCompensation Manager Desktop)	HR_EC_HIST_SS_FL	Review your compensation history.
"Bonus Earnings Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_BONUS2_FL	View a history of bonus amounts you have received over the past few years.
"Salary History Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_CMP_SALHST_FL	View your compensation history in a grid format.
"Salary History Details Page" (PeopleSoft eProfile Manager Desktop)	HCTS_CMP_SALHS_SCF	View you compensation history in a grid format.
"Performance History Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_PERFHIST2_FL	View a summary of your current and historical performance documents.
"Performance History Page" (PeopleSoft eProfile Manager Desktop)	HCTS_PERFHIST_SCF	Review your overall ratings from past performance periods using a table grid.

Page Name	Definition Name	Usage
"Total Rewards Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_CMP_TRW_FL	View your most recent total rewards statement to review earnings, benefits, and other compensation information in a chart format.
"Total Rewards Details Page" (PeopleSoft eProfile Manager Desktop)	HCTS_CMP_TRGRD_SCF	View the list of reward items that make up your total rewards.

Note: These pages and tiles are similar to those on the (Manager and Administrator) Employee Snapshots - Compensation Review dashboard. For further information on these tiles and pages, see the "Viewing the Compensation Review Tiles and Pages" (PeopleSoft eProfile Manager Desktop) documentation.

Career Snapshot - Compensation Dashboard

Employees use the Career Snapshot - Compensation dashboard to access a variety of high level tiles about their compensation.

Navigation:

Select the Career Snapshot Tile from the homepage you added the tile and select the **Compensation** tab.

Note: You must be assigned the *Talent Summary Employee Fluid* role to access the Career Snapshot dashboards.

This example illustrates the Career Snapshot - Compensation dashboard.
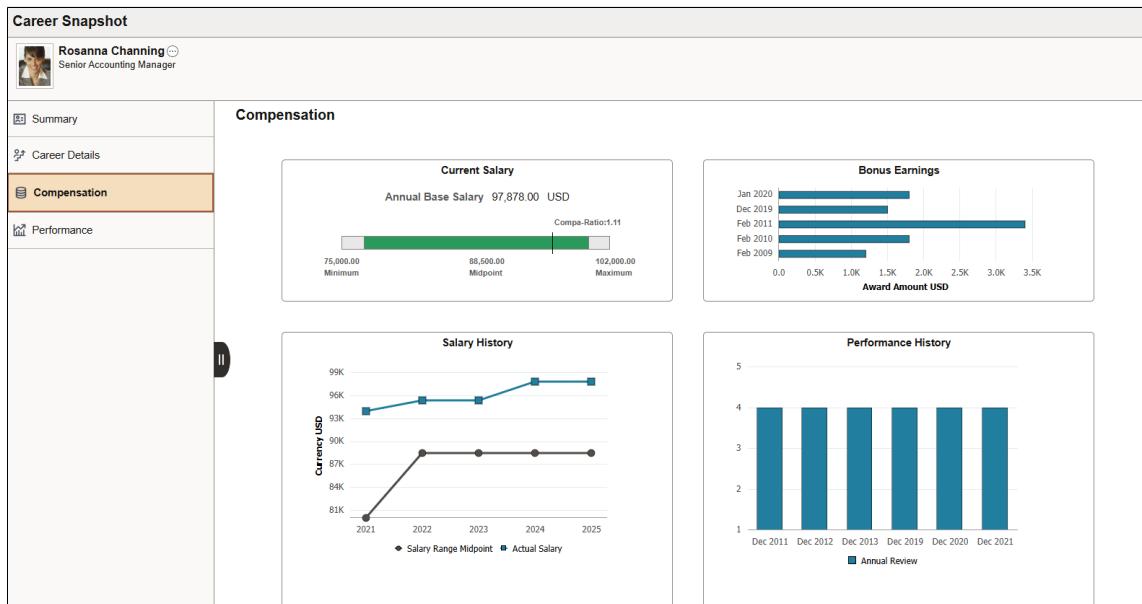
These tiles are delivered by default with the **Compensation** dashboard:

• "Current Salary Tile" (PeopleSoft eProfile Manager Desktop)

- "Bonus Earnings Tile" (PeopleSoft eProfile Manager Desktop)

- "Salary History Tile" (PeopleSoft eProfile Manager Desktop)

- "Performance History Tile" (PeopleSoft eProfile Manager Desktop)

- "Total Rewards Tile" (PeopleSoft eProfile Manager Desktop)

Note: These tiles are delivered by default to appear on the **Compensation** dashboard page of Career Snapshot; however, the administrator can move the tiles to appear on other Career Snapshot dashboard folders. The navigation in the corresponding topics references the delivered navigation.

Field or Control	Description
View Another Job link	This link is available when you have multiple jobs. Select this link to access the View Another Job Page and change the Career Snapshot view to examine data related to another one of your jobs.

Viewing the Career Snapshot - Performance Tiles and Pages

Employees use the Career Snapshot - Performance dashboard and pages to view data related to their performance, such as reviews, responsibilities, and certifications.

This topic discusses and lists the Career Snapshot - Performance tiles and pages for the employee.

Pages Used to View Career Snapshot - Performance Tiles and Pages

Page Name	Definition Name	Usage
Career Snapshot - Performance Dashboard	PT_LANDINGPAGE	View tiles related to your performance
"Performance History Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_PERFHIST2_FL	View a summary of your current and historical performance documents.
"Performance History Page" (PeopleSoft eProfile Manager Desktop)	HCTS_PERFHIST_SCF	Review the overall rating of your past performance periods using a table grid.
"Responsibilities Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_RESP_CMP_FL	View a list of your responsibilities.
"Responsibilities Details Page" (PeopleSoft eProfile Manager Desktop)	JPM_ITM_DTL_FL	View additional information about your assigned responsibilities.

Page Name	Definition Name	Usage
"Special Projects Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_PROJECTS_FL	View a short list of your assigned projects.
"Special Projects Page" (PeopleSoft eProfile Manager Desktop)	HCTS_PROJECTS_SCF	View a complete list of projects assigned to you.
"Special Projects Details Page" (PeopleSoft eProfile Manager Desktop)	JPM_ITM_DTL_FL	View additional details about a project assigned to you.
"Personal Competencies Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_PERS_COMP2_FL	View a list of competencies associated with your profile, but not your job (non-person) profile.
"Job Competencies Page" (PeopleSoft eProfile Manager Desktop)	HCTS_PERS_COMP_FL	View a complete list of competencies associated with your person profile, but not your job (non-person) profile.
"Job Competency Details Page" (PeopleSoft eProfile Manager Desktop)	JPM_ITM_DTL_FL	View additional details about a competency rating.
"Licenses and Certifications Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_LICENSE_FL	View the number of current, expiring, or missing licenses and certifications you hold.
"Licenses and Certifications Page" (PeopleSoft eProfile Manager Desktop)	HCTS_LICENSE_SCF	View the licenses and certifications you hold.
"Licenses and Certifications Details Page" (PeopleSoft eProfile Manager Desktop)	JPM_ITM_DTL_FL	View additional details about a license or certification.
"Job Competencies Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_JOBCOMPSUM_FL	View a summary graphic of how your (primary person) profile matches the competencies associated with your job (primary non-person) profile.
"Job Competencies Page" (PeopleSoft eProfile Manager Desktop)	HCTS_JOBCOMPDTL_FL	Review a list of competencies associated with your job (non-person) profile compared to your (person) profile.
"Recognitions Tile" (PeopleSoft eProfile Manager Desktop)	HCTS_RECOG_GRID_FL	View the number of recognitions you have received over the last 12 months.
"View Recognitions Page" (PeopleSoft eProfile Manager Desktop)	HRRC_VIEW_RECOG_FL	View a list of recognitions and their details that you have received over time.

Note: These pages and tiles are similar to those on the (Manager and Administrator) Employee Snapshots - Performance Review dashboard. For further information on these tiles and pages, see the "Viewing the Promotion Readiness and Career Details Tiles and Pages" (PeopleSoft eProfile Manager Desktop) and "Viewing the Performance Review Tiles and Pages" (PeopleSoft eProfile Manager Desktop) documentation.

Career Snapshot - Performance Dashboard

Use the Career Snapshot - Performance dashboard to view tiles related to your performance.

Navigation:

Select the Career Snapshot Tile from the homepage you added the tile and select the **Performance** tab.

Note: You must be assigned the *Talent Summary Employee Fluid* role to access the Career Snapshot dashboards.

This example illustrates the Career Snapshot - Performance dashboard.

These tiles are delivered by default with the **Performance** dashboard:

• "Performance History Tile" (PeopleSoft eProfile Manager Desktop)

• "Responsibilities Tile" (PeopleSoft eProfile Manager Desktop)

• "Special Projects Tile" (PeopleSoft eProfile Manager Desktop)

• "Personal Competencies Tile" (PeopleSoft eProfile Manager Desktop)

• "Licenses and Certifications Tile" (PeopleSoft eProfile Manager Desktop)

• "Job Competencies Tile" (PeopleSoft eProfile Manager Desktop)

• "Recognitions Tile" (PeopleSoft eProfile Manager Desktop)

Note: These tiles are delivered by default to appear on the **Performance** dashboard page of Career Snapshot; however, the administrator can move the tiles to appear on other Career Snapshot dashboard folders. The navigation in these topics references the delivered navigation.

Field or Control	*Description*
View Another Job link	This link is available when you have multiple jobs. Select this link to access the View Another Job Page and change the Career Snapshot view to examine data related to another one of your jobs.

Chapter 5

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.
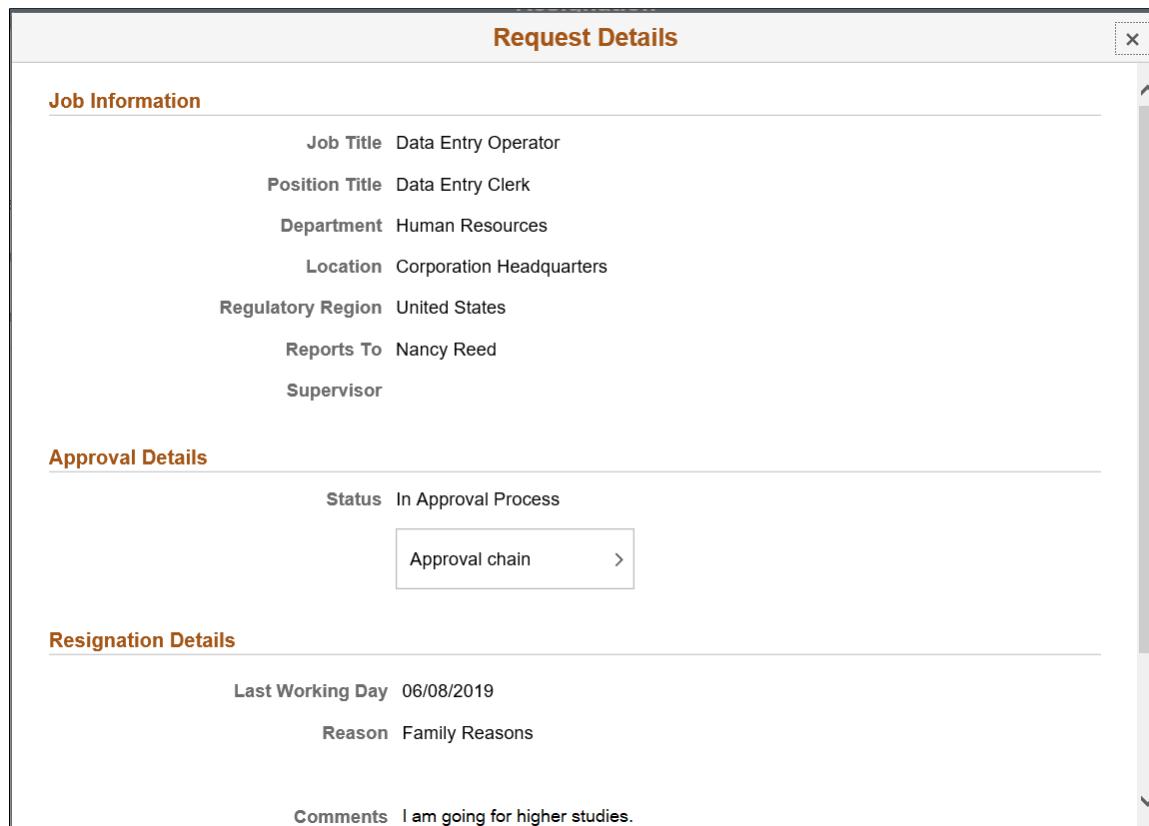
Approving Resignation Requests

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.

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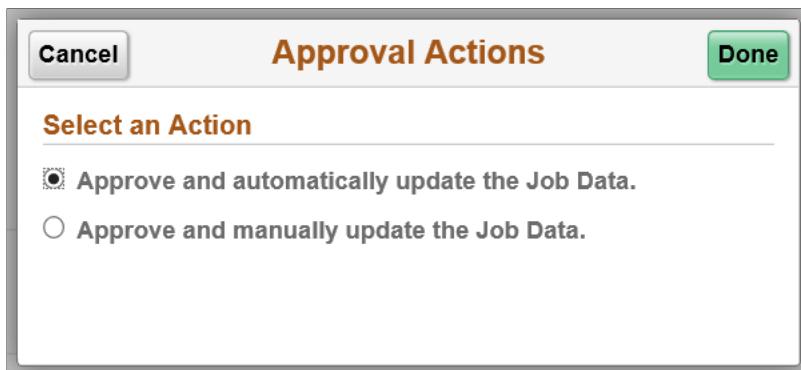
Note: HR administrators can also deny or pushback the request. In this case, employee gets notified and you need to update the required details and resubmit the request.

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.

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.
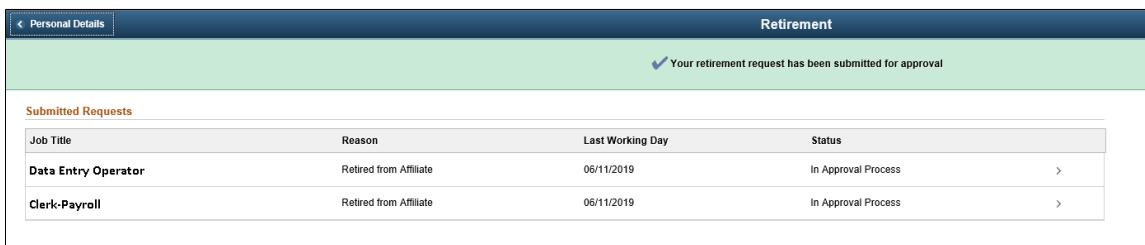
Approving Retirement Requests

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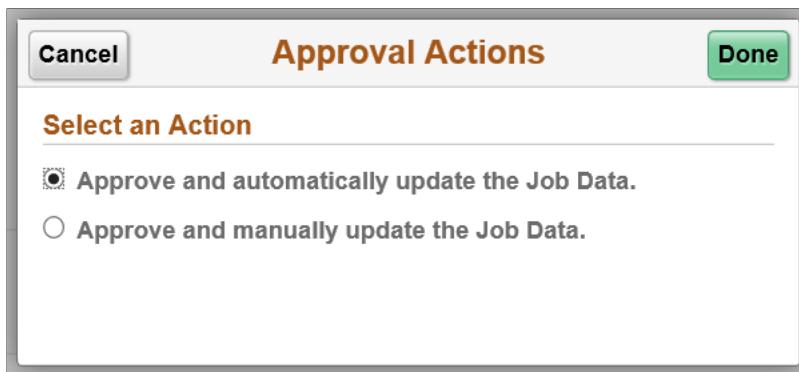
Note: HR administrators can also deny or pushback the request. In this case, employee gets notified and need to update the required details and resubmit the request.

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.
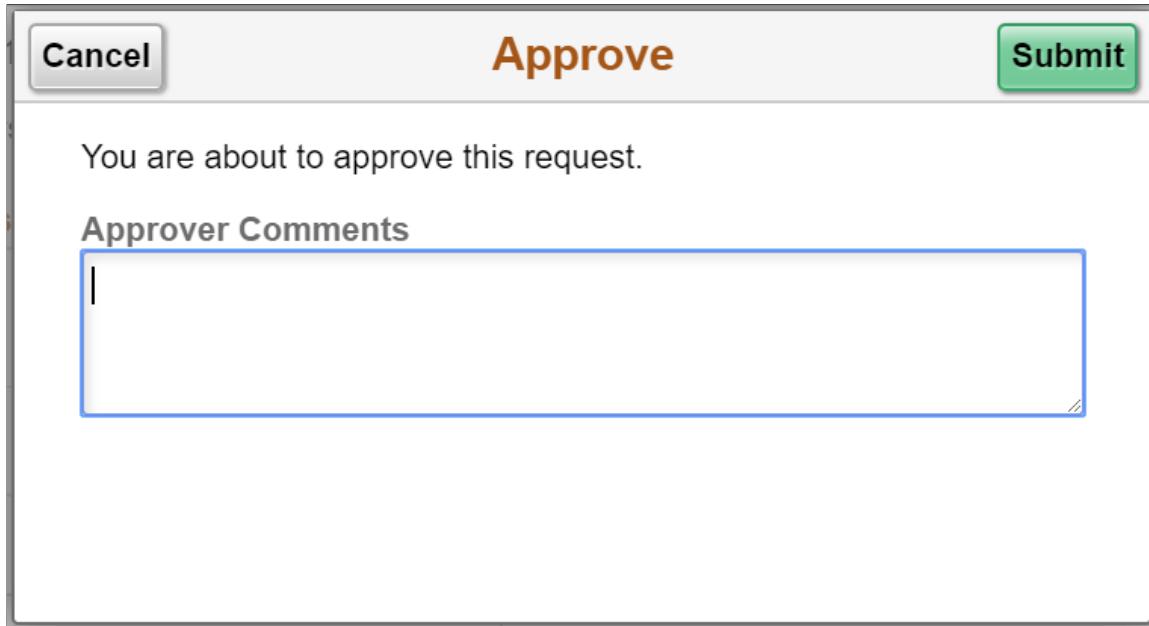
Setting up Transaction Configuration for Resignation and Retirement

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.