City of Minneapolis

PeopleSoft HCM/ELM v9.2 Upgrade

HUMAN RESOURCES SELF-SERVICE:
STEP-BY-STEP INSTRUCTIONS

Human Resources

Created on 8/24/2015 9:53:00 AM

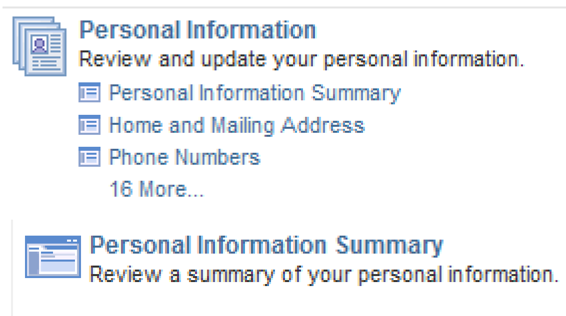
Table of Contents

Human Resources

Personal Information

Name Change

The Personal Information Summary page allows you to update your name, address, phone numbers, emergency contacts, email address, marital status, smoker status and disability status. You can also view your gender, birthday, military status, hire date and ethnic group. If there is a discrepancy with any view, contact your Department HR/Payroll representative to request any corrections.



Menu Path: *Click Employee Self Service tab > Personal Information link > Personal Information Summary link > Change Name button*

Note: You may be required to send proof of the name change to Human Resources. All name changes must match the name provided on your Social Security card

Procedure

Step	Action
1.	Click the **Personal Information** link. Personal Information
2.	Click the **Personal Information Summary** link. Personal Information Summary
3.	Click the **Change Name** button. Change Name
4.	You can select the date of effect for the name change. Optionally, you can enter the date manually. Click the **Choose a date (Alt+5)** button.
5.	Click the desired date. 15

Step	Action
6.	The Name Format field defaults to English. Click the **Name Format** list. English
7.	Click the **English** list item. English
8.	The new name can be modified. Click the **Edit Name** button. Edit Name
9.	The Edit Name screen is where updates to the employee name can be made. Click the **OK** button. OK
10.	The Name Change screen appears. Once submitted, the name will actually be changed after the Personnel Administrator approves. Click the **Submit** button. Submit
11.	Click the **Return to Personal Information** link. Return to Personal Information
12.	**End of Procedure.**

Home/Mailing Address Change

Home and Mailing Address
Review and update your home and mailing addresses.

Menu Path: *Click Employee Self Service tab > Personal Information link > Personal Information Summary link > Change Home/Mailing Addresses button*

▿ Home/Mailing Addresses

Addresses

Address Type	Status	As Of	Country	Address
Home	Current	05/26/2015	USA	123 1st Ave N Mpls, MN 55415
Mailing	Current	05/26/2015	USA	123 1st Ave N Mpls, MN 55415

Change Home/Mailing Addresses

Notes:

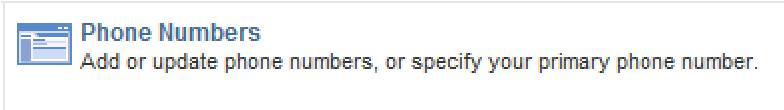
1. If you are unable to access paycheck data online and are receiving a check advice or actual paycheck in the mail, Central Payroll should be notified of any special mailing address requirements. Only Central Payroll (612-673-2079) can redirect paycheck information to a mailing address.
2. When changing the date, keep in mind the new effective date when the paycheck/pay advice will be mailed to the new address.

Procedure

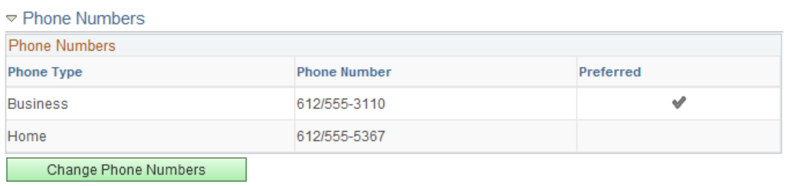
Step	Action
1.	Click the **Self Service** link. Self Service
2.	Click the **Personal Information** link. Personal Information
3.	Click the **Personal Information Summary** link. Personal Information Summary
4.	Click the **Change Home/Mailing Addresses** button. Change Home/Mailing Addresses
5.	The Home Address can be changed. Click the **Edit** button.

Step	Action
6.	The Edit Home Address screen appears where changes can be entered. Optionally, you can enter the date manually. Click the **Choose a date (Alt+5)** button.
7.	Click the desired date.
8.	Enter the desired information into the **Address 1** field.
9.	Click the **Save** button.
10.	Click the **OK** button.
11.	The Mailing Address can be changed. Click the **Edit** button.
12.	The Edit Mailing Address screen appears where changes can be entered. Optionally, you can enter the date manually. Click the **Choose a date (Alt+5)** button.
13.	Click the desired date.
14.	Click the **Save** button.
15.	Click the **OK** button.
16.	Click the **Return to Personal Information** link.
17.	Click the scrollbar.
18.	**End of Procedure.**

Phone Number Change



Menu Path: *Click Employee Self Service tab > Personal Information link > Personal Information Summary link > Change Phone Numbers button*

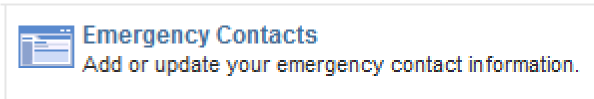


Procedure

Step	Action
1.	Click the **Phone Numbers** link. Phone Numbers
2.	Phone numbers are listed in the Phone Numbers section. Click the **Add Phone Number** button. Add Phone Number
3.	**NOTE:** When adding a new phone number, you cannot have two phone numbers of the same 'Phone Type'. Click the **Phone Type** list.
4.	Click the **Home** list item. Home
5.	Click in the **Telephone** field.
6.	Enter the desired information into the **Telephone** field.
7.	Before saving, ensure that at least one phone number is selected as the as the 'Preferred' phone number. Click the **Save** button. Save
8.	Click the **OK** button. OK

Step	Action
9.	Click the **Return to Personal Information** link. Return to Personal Information
10.	**End of Procedure.**

Emergency Contacts



Menu Path: *Click Employee Self Service tab > Personal Information link > Personal Information Summary link > Change Emergency Contacts button*

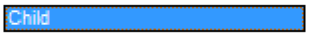

Emergency Contacts

Name	Relationship to Employee	Primary Contact
Frohman Jr, Abe	Son	
Frohman, Sally	Daugher	✔

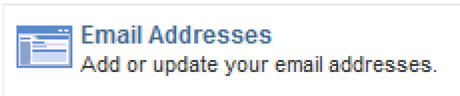
Change Emergency Contacts

Procedure

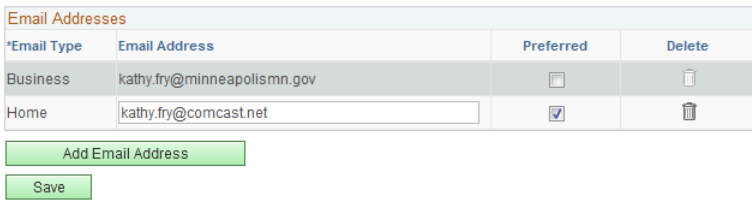
Step	Action
1.	Click the **Self Service** link. Self Service
2.	Click the **Personal Information** link. Personal Information
3.	Click the **Emergency Contacts** link. Emergency Contacts
4.	The Emergency Contacts screen displays. Click the **Edit** button.
5.	The Emergency Contact Detail screen appears. Enter any changes to the Emergency Contact information. Click the **Save** button. Save
6.	Click the **OK** button. OK
7.	Click the **Add Emergency Contact** button. Add Emergency Contact
8.	Be sure to enter the contact name in "Last Name,First Name" format. (Add a comma between Last Name & First Name, but no space). Enter the desired information into the **Contact Name Required** field.

Step	Action
9.	Click the **Relationship to Employee** list. Select the appropriate relationship to the employee. 
10.	Click the list.
11.	Select the appropriate relationship to the employee. Click the **Child** list item. 
12.	Click the **Contact has the same address as the employee** option. (if applicable) 
13.	Click the **Contact has the same telephone number as the employee** option. (if applicable). Otherwise, enter the emergency contact's phone number below. Phone number is required for emergency contact. 
14.	Click the **Save** button. 
15.	Click the **OK** button. 
16.	Click the **OK** button. 
17.	One contact has to be marked as the 'Primary Contact'. Click the **Return to Personal Information** link. 
18.	Click the **Home** link. 
19.	 **End of Procedure.**

Email Address



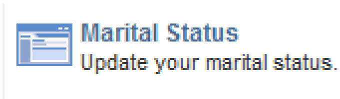
Menu Path: *Click Employee Self Service tab > Personal Information link > Personal Information Summary link > Change Email Addresses button*



Procedure

Step	Action
1.	Click the **Add Email Address** button. Add Email Address
2.	Click the **Email Type** list.
3.	Click the **Home** list item. Home
4.	Click in the **Email Address** field.
5.	Enter the desired information into the **Email Address** field.
6.	Click the **Save** button. Save
7.	Click the **OK** button. OK
8.	Click the **Return to Personal Information** link. Return to Personal Information
9.	**End of Procedure.**

Marital Status



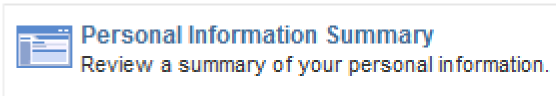
Menu Path: *Click Employee Self Service tab > Personal Information link > Personal Information Summary link*

Notes: Marital Status is display only on the Personal Information Summary Screen and is changed in the eBenefits section. For further information on Marital Status changes, contact Benefits Administration at benefits@minneapolismn.gov.

Procedure

Step	Action
1.	Click the **Personal Information Summary** link. Personal Information Summary
2.	Scroll down to the section **Marital Status**. Marital Status is display only on the Personal Information Summary screen.
3.	Click the **Return to Personal Information** link. Return to Personal Information
4.	**End of Procedure.**

Smoker Status



Menu Path: *Click Employee Self Service tab > Personal Information link > Personal Information Summary link > Change Smoker Status button*

Notes:

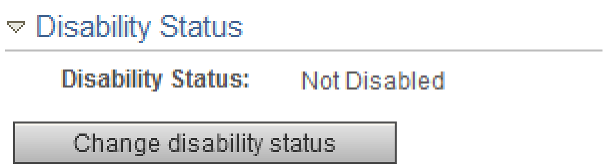
1. It is important that the correct status be recorded <u>online</u> if you enrolled in the Optional Life Plan. Smoker rates are slightly higher per $1,000 of coverage. However, in the event of a death directly attributed to smoking and the smoker status online is not correct, claim payments may be affected.
2. The following steps show how to change a Smoker Status to 'enabled. The default for a non-smoker is a 'blank' value'. If the employee is not a smoker, then this information does not require an update.

Procedure

Step	Action
1.	Click the **Personal Information Summary** link. Personal Information Summary
2.	Scroll down to the **Smoker Status** section.
3.	Click the **Change smoker status** button. Change smoker status
4.	If you are a smoker, select the Smoker checkbox. Click the **Smoker** option.
5.	Click the **Save** button. Save
6.	Click the **OK** button. OK
7.	Click the **Return to Personal Information** link. Return to Personal Information
8.	**End of Procedure.**

Disability Status

Menu Path: *Click Employee Self Service tab > Personal Information link > Personal Information Summary link > Change Disability Status button*

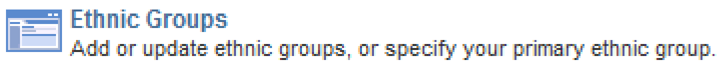


Notes: The following steps show how to change a Disability Status to 'disabled'. If the employee is 'Not Disabled', then this information does not require an update.

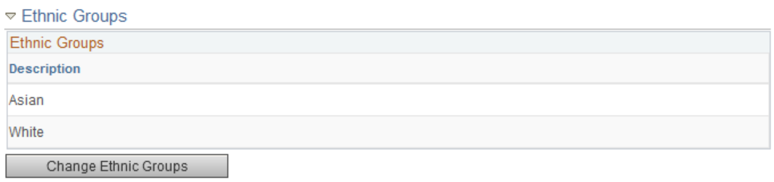
Procedure

Step	Action
1.	Click the **Change disability status** button. Change disability status
2.	The disabled box is usually unchecked. Only check the Disabled box if this is your correct status. Click the **Disabled** option.
3.	Disability Status Change needs to be saved. Click the **Save** button. Save
4.	Click the **OK** button. OK
5.	Click the **Return to Personal Information** link. Return to Personal Information
6.	**End of Procedure.**

Ethnic Groups



Menu Path: *Click Employee Self Service tab > Personal Information link > Personal Information Summary link*



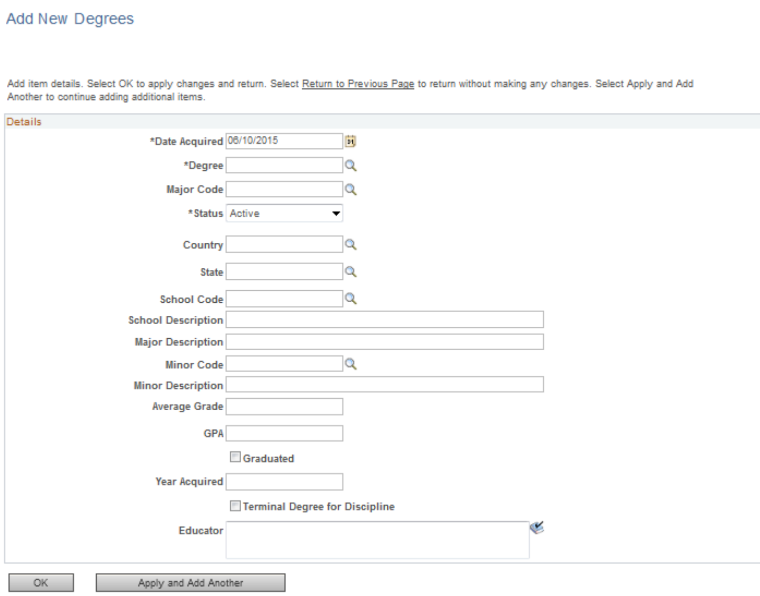
Procedure

Step	Action
1.	Click on the **Ethnic Groups** link. Ethnic Groups
2.	Your current ethnicity will be stated on the page. You can change or 'Add' to your current ethnicity by clicking the 'Add an Ethnic Group' button and the drop down to view and select an additional ethnicity. You can continue this process and select as many ethnicities as applicable. Click the **Add an Ethnic Group** button. Add an Ethnic Group
3.	Click the **Description** list.
4.	Click the **Asian** list item.
5.	Click the **Save** button. Save
6.	Click the **OK** button. OK
7.	Click the **Return to Personal Information** link. Return to Personal Information
8.	**End of Procedure.**

Profile Management

Add New Degree

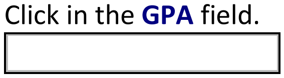
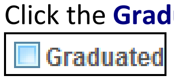
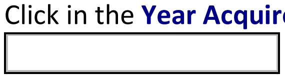
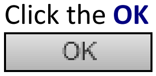
Menu Path: *Click Employee Self Service tab > Career Planning link > My Profile link*



Procedure

Step	Action
1.	Click the **Self Service** object.
2.	Click the **Career Planning** link. Career Planning
3.	Click the **My Profile** link. My Profile
4.	Click the **Education** link. Education
5.	Click the **Add New Degrees** button.

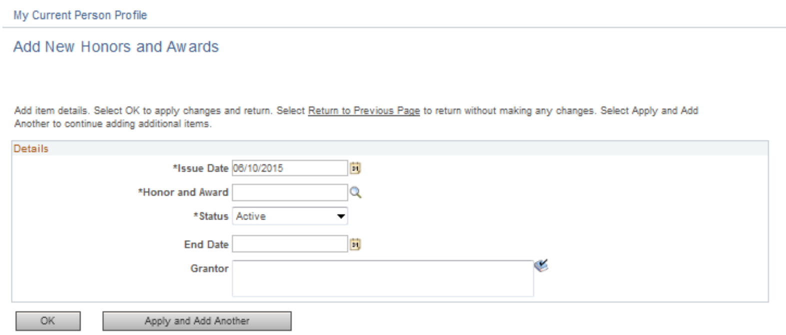
Step	Action
6.	A date must be entered for the Date Acquired Field. Click the **Date Acquired Field or Calendar** button.
7.	Select or enter the **Date Acquired.** Do not enter a future date. Click the desired date. 28
8.	Click the **Look up Degree** button.
9.	Select the appropriate **Degree.** Click the **Bachelor of Engineering** link. Bachelor of Engineering
10.	Click the **Look up Major Code** button.
11.	Select the appropriate **Major Code.** Click the **01000** link. 01000
12.	Click the **Status** list. Active
13.	The default **Status** is 'Active'. Click the **Active** list item. Active
14.	Click the **Country** button.
15.	Click in the **begins with** field.
16.	Enter the desired information into the **begins with** field.
17.	Press **[Enter]**.
18.	Click the **USA** link. USA
19.	Click the **State** button.
20.	Click in the **begins with** field.

Step	Action
21.	Enter the desired information into the **begins with** field.
22.	Press **[Enter]**.
23.	Click the **MN** link. 
24.	Click the **School Code** button. 
25.	Select the appropriate **School Code**. Click the **UM-TWINCTY** link. 
26.	Click the **Minor Code** button. 
27.	Select the appropriate **Minor Code**. Click the **00460** link. 
28.	**Average Grade** is an optional field, and entry is not required. Click in the **Average Grade** field. 
29.	**GPA** is an optional field, and entry is not required. Click in the **GPA** field. 
30.	Click the **Graduated** option. 
31.	Click in the **Year Acquired** field. 
32.	Enter the desired information into the **Year Acquired** field.
33.	Click the **OK** button. 
34.	Click the **Save** button. 

Step	Action
35.	Under the **Degrees** section - once a degree has been entered, the degree is listed below. Information regarding the degree can be updated by clicking on the **Edit** button. Click the **Edit** button. 
36.	Click the **OK** button. OK
37.	Click the **Save** button. Save
38.	Click the **Home** link. Home
39.	**End of Procedure.**

Add New Honors and Awards

Menu Path: *Click Employee Self Service tab > Career Planning link > My Profile link*



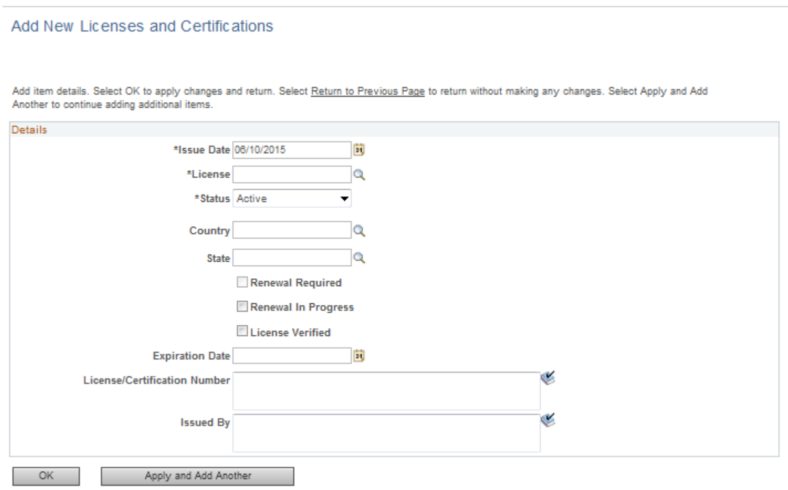
Procedure

Step	Action
1.	Click the **Self Service** link. Self Service
2.	Click the **Career Planning** link. Career Planning
3.	Click the **My Profile** link. My Profile
4.	Click the **Qualifications** object. Qualifications
5.	Click the **Add New Honors and Awards** button.
6.	Enter a date into the **Issue Date** field or select the date using the Calendar. Do not enter a future date. Click in the **Issue Date** field. 06/30/2015
7.	Click the **Look up Honor and Award** button.

Step	Action
8.	Select the appropriate **Honor or Award.** Click the **Award of Excellence** link. Award of Excellence
9.	**Status** defaults to 'Active'. Click the **Status** list. Active
10.	Click the **Active** list item. Active
11.	Click in the **End Date** field. Enter an End Date for the Honor or Award (if applicable).
12.	Enter a date into the **End Date** field or select the date using the Calendar function. Click the **Choose a date** button.
13.	Click the desired date. 28
14.	Click in the **Grantor** field. Enter any information in the Grantor field (if applicable).
15.	Click the **OK** button. OK
16.	Click the **Save** button. Save
17.	Click the **Home** link. Home
18.	**End of Procedure.**

Add New Licenses and Certifications

Menu Path: *Click Employee Self Service tab > Career Planning link > My Profile link*



Note: Do not use the Licenses and Certification self-service page to record or enter driver's license information. All driver's license information, including CDL's and endorsements, must be verified and recorded by a Department HRIS Administrator.

Procedure

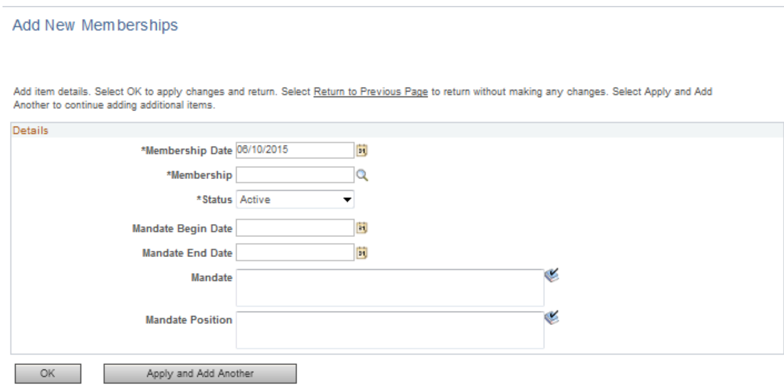
Step	Action
1.	Click the **Self Service** link. Self Service
2.	Click the **Career Planning** link. Career Planning
3.	Click the **My Profile** link. My Profile
4.	Click the **Qualifications** object. Qualifications
5.	Click the **Add New Licenses and Certifications** button.

Step	Action
6.	Enter a date into the **Issue Date field** or select the date using the Calendar. Click the **Choose a date** button.
7.	Do not enter a future date. Click the desired date. 28
8.	Click the **Look up License** button.
9.	Select the appropriate license. Click the **Assessor, Minnesota, Certified** link. Assessor, Minnesota, Certified
10.	The **Status** defaults to **'Active'.** Click the **Status** list. Active
11.	Click the **Active** list item. Active
12.	Click the **Country** button.
13.	Click in the **begins with** field.
14.	Enter the desired information into the **begins with** field.
15.	Click the **Look Up** button. Look Up
16.	Click the **USA** link. USA
17.	Click the **State** button.
18.	Click in the **begins with** field.
19.	Enter the desired information into the **begins with** field.
20.	Click the **Look Up** button. Look Up
21.	Click the **MN** link. MN

Step	Action
22.	Click the **Renewal In Progress** option. (if applicable) Renewal In Progress
23.	(if applicable) Click the **License Verified** option. License Verified
24.	Enter an **Expiration Date** (if applicable). Depending on the type of license, the **Expiration Date** field may be auto-populated with a date. Click in the **Expiration Date** field. 06/28/2019
25.	Click the **Assessor, Minnesota, Certified** link. Assessor, Minnesota, Certified
26.	The **Renewal Length/Period** is set to 4 years for this type of certification/license, so the **Effective Date** is automatically set to 4 years from the **Issue Date**. Click the **Close** button. Close
27.	Click in the **License/Certification Number** field. Enter any information (if applicable).
28.	Click in the **Issued By** field. Enter any information (if applicable).
29.	Click the **OK** button. OK
30.	Click the **Save** button. Save
31.	Click the **Home** link. Home
32.	**End of Procedure.**

Add New Membership

Menu Path: *Click Employee Self Service tab > Career Planning link > My Profile link*



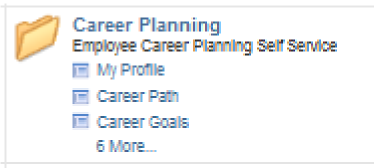
Procedure

Step	Action
1.	Click the **Self Service** link. Self Service
2.	Click the **Career Planning** link. Career Planning
3.	Click the **My Profile** link. My Profile
4.	Click the **Qualifications** object. Qualifications
5.	Click the **Add New Memberships** button.
6.	Click in the **Membership Date** field. Enter a valid **Membership Date** or select a date using the Calendar function. 06/30/2015
7.	Click the **Look up Membership** button.

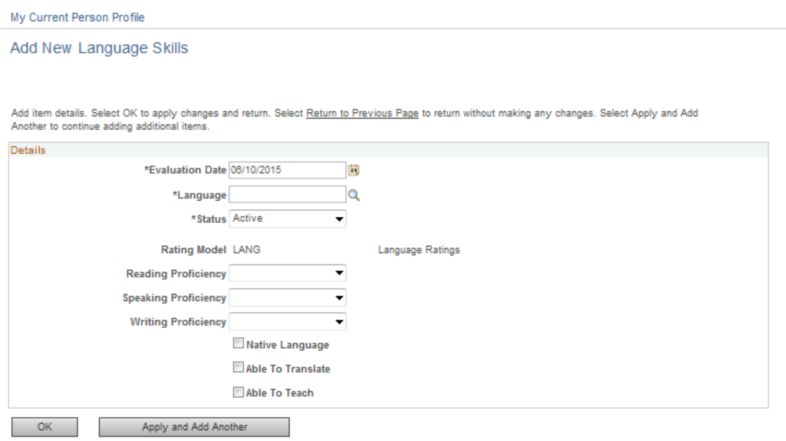
Step	Action
8.	Select the appropriate **Membership.** Click the **Amer Society Civil Engineers** link. Amer Society Civil Engineers
9.	The membership description selected is displayed next to the **Membership** value. Click the **Amer Society Civil Engineers** link. Amer Society Civil Engineers
10.	The **Content Item Details** pop-up displays. This pop-up shows additional details for selected membership. Click the **Close** button. Close
11.	The default **Status** is 'Active'. Click the **Status** list. Active
12.	Click the **Active** list item. Active
13.	Click in the **Mandate Begin Date** field. Enter a **Mandate Begin Date** (if applicable).
14.	Click in the **Mandate End Date** field. Enter a **Mandate End Date** (if applicable).
15.	Click in the **Mandate** field. Enter a **Mandate** (if applicable).
16.	Click in the **Mandate Position** field. Enter a **Mandate Position** (if applicable).
17.	Click the **OK** button. OK
18.	Click the **Save** button. Save
19.	Click the **Home** link. Home

Step	Action
20.	**End of Procedure.**

Add New Language Skills



Menu Path: *Click Employee Self Service tab > Career Planning link > My Profile link*



Procedure

Step	Action
1.	Click the **Self Service** link. Self Service
2.	Click the **Career Planning** link. Career Planning
3.	Click the **My Profile** link. My Profile
4.	Click the **Qualifications** object. Qualifications
5.	If current Language Skills have been entered, those skills are listed in the **Language Skills** section. Click the **Add New Language Skills** button. +

Step	Action
6.	Click in the **Evaluation Date** field. Enter the **Evaluation Date** or select a date using the Calendar function. Do not use a future date. 06/30/2015
7.	Click the **Look up Language** button.
8.	Select the appropriate **Language.** Click the **Czech** link. Czech
9.	Select the language description (to the right of the **Language**). Click the **Czech** link. Czech
10.	The **Content Item Details** pop-up displays. Additional information about the selected language is displayed. Click the **Close** button. Close
11.	Click the **Status** list. The default **Status** is 'Active'. Active
12.	Click the **Active** list item. Active
13.	Click the **Reading Proficiency** list.
14.	Enter the appropriate **Reading Proficiency.** Click the **3 - High** list item. 3 - High
15.	Click the **Speaking Proficiency** list.
16.	Enter the appropriate **Speaking Proficiency.** Click the **3 - High** list item. 3 - High
17.	Click the **Writing Proficiency** list.

Step	Action
18.	Enter the appropriate **Writing Proficiency.** Click the **3 - High** list item. 3 - High
19.	Click the **Native Language** option. (if applicable) Native Language
20.	Click the **Able To Translate** option. (if applicable) Able To Translate
21.	Click the **Able To Teach** option. (if applicable) Able To Teach
22.	Click the **OK** button. OK
23.	Click the **Save** button. Save
24.	Click the **Home** link. Home
25.	**End of Procedure.**