Contra Costa County PeopleSoft Training

eProfile



Training Guide



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Employee Self Service--eProfile eProfile

Overview of eProfile

Overview of eProfile

The eProfile portion of PeopleSoft enables employees to complete the following tasks online:

	Description
Personal Details	 Review Personal Information Submit name change Update Address information Update phone information Review email information Update emergency contact information Update Ethnic Group self-identification Review additional Personal Information
Maintain Name Information	Submit a request to change your name
Maintain Address Information	Update your mailing and home addresses
Maintain Phone Information	 Update existing phone information Add an additional phone number Delete an existing phone number
Maintain Email Information	 Review your business email address Add a home email Review your home email Update/delete your home email
Maintain Emergency Contact Information	 Add an emergency contact Update emergency contact information Add additional emergency contacts Delete an emergency contact
Maintain Ethnicity Information	 Add an ethnic group self-identification Edit an ethnic group self-identification Delete an ethnic group self-identification



Maintain Veteran and Disability Self-Identifications	Record your disability statusRecord your military status

Changes you make to your personal information using eProfile take place immediately, with the exception of requests to change your name. Name change requests must be processed by Human Resources before they take effect.

Each of these tasks is covered in one of the lessons in the eProfile section of Employee Self Service Training:

- Working with Personal Details Page
- Submitting Name Change Requests
- Maintaining Address Information
- Maintaining Phone Information
- Maintaining Email Information
- Maintaining Emergency Contact Information
- Maintaining Ethnicity Self-Identifications
- Maintaining Veteran and Disability-Self Identifactions

Working with Personal Details Page

Working with Personal Details Page

The Employee Self Service feature of PeopleSoft 9.2 allows you to view and update your personal information online.

The **Personal Details** page allows you to review and make updates to your personal information from a single page. You can review and update your

- Name (submit a request for it to be changed in the system)
- Your Home and Mailing Addresses
- Your Phone information
- Your email addresses
- Your emergency contacts
- Your Ethnic Group Self- Identification
- View additional personal information

The steps involved in using the **Personal Details** page are covered in a single topic in this lesson:

• Using the **Personal Details** page

This topic is available for play-back through the UPK player in

- See-It! Mode—allows you to attach a "video" demonstration of the topic
- Try-It! Mode—allows you to use your mouse and keyboard to complete transactions in a simulated environment

Both See-It! And Try-It! Provide guided instructions and explanations of important features of PeopleSoft transactions. The full text of the instructions and explanations included in the UPK Payer are also available in two printed documents—a Training Guide and a Job Aid.

Here are some key points to keep in mind about using the **Personal Details** page:

- The Personal Details page can be accessed from the Employee Self-Service home page
- You can use this page to review your personal information as it is currently stored in the system
- You can use this page to change (or request changes) to your personal information
- The Additional Personal information page presents information in view only mode

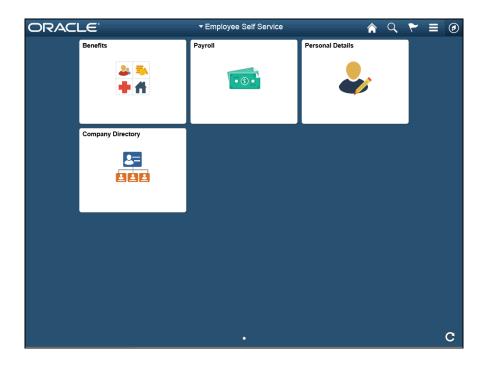
Using the Personal Details Page

The basic steps to using the Personal Details page are:

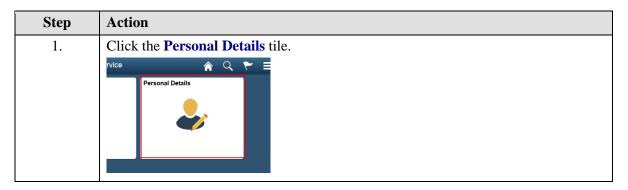
- 1. Click the **Personal Details** tile on the **Employee Self Service** home page.
- 2. Click on each of the links in the **Actions** panel.
- 3. Review information that displays in the **Information** panel

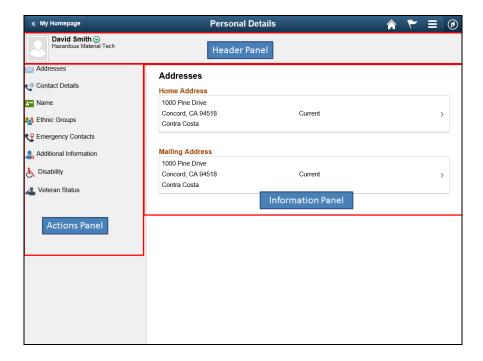
See the other topics in this course for instruction on how to add, edit, and or delete your personal information using this page.

Procedure



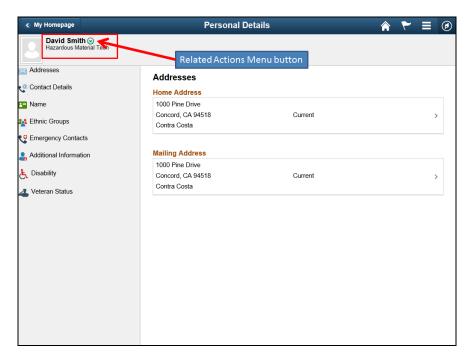






Step	Action
2.	The Personal Details page displays.
	This page contains three panels:
	Header panel Left Side Actions panel Right Side Information panel

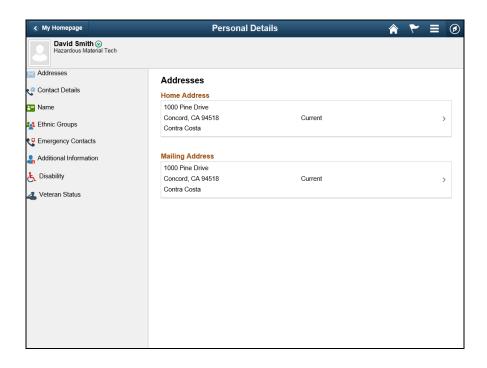




Step Action

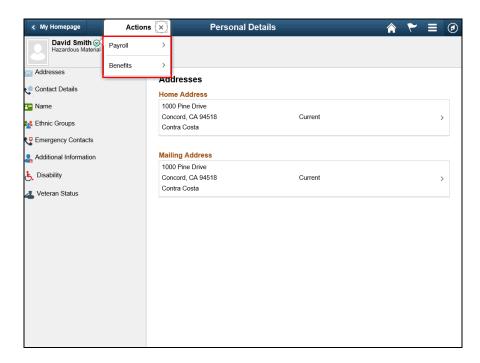
3. The Header panel displays your name and your position description.

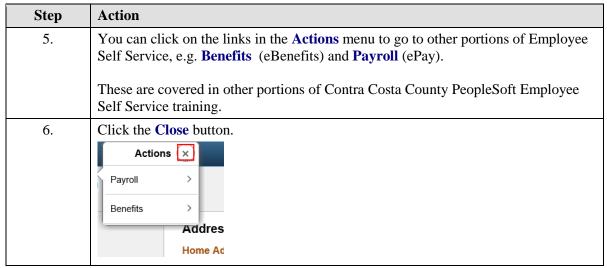
To the right of your name is the Related Actions Menu button. Use this button to access other portions of Employee Self Service.



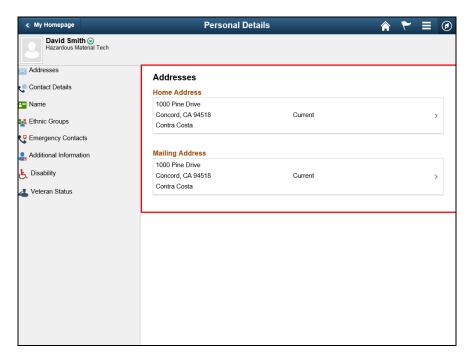


Step	Action
4.	Click the Related Action Menu button.



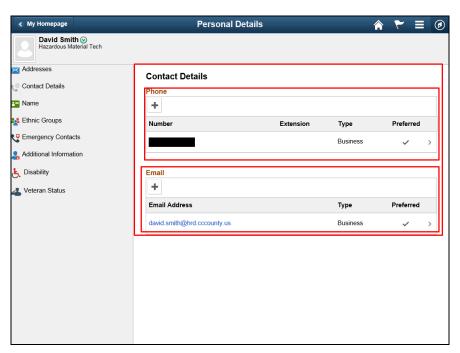






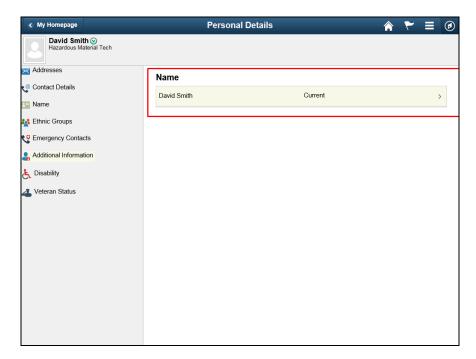
Step	Action
7.	The right side information panel displays the Addressees grids. This grid lists your current Home Address and Mailing Address .
	You can use this page to edit one or both of these addresses. Maintaining your address information is covered in another topic in the Contra Costa County Employee Self Service eProfile training.
8.	Click the Contact Details link. © Contact Details





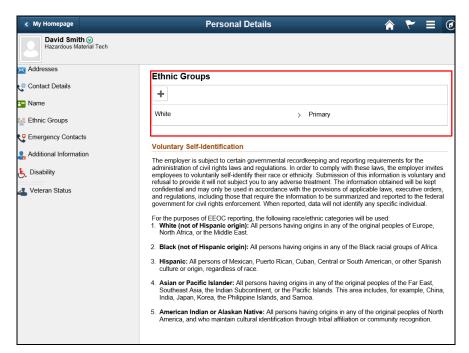
Step	Action
9.	The right side information panel now displays your Contact Details . This panel contains two grids:
	Phone : this grid lists your phone numbers as stored in the system. You can store up to 4 phone numberBusiness, Home, Cell, and Pager1.
	Email: this grid lists your email address as stored on the system. Your business email address is stored in the system. You cannot edit or delete this address. You cannot add additional email addresses.
	You can use this page to edit, add, or delete address information. These actions are covered in other topics in Contra County PeopleSoft Employee Self Service eProfile training.
10.	Click the Name link. Name





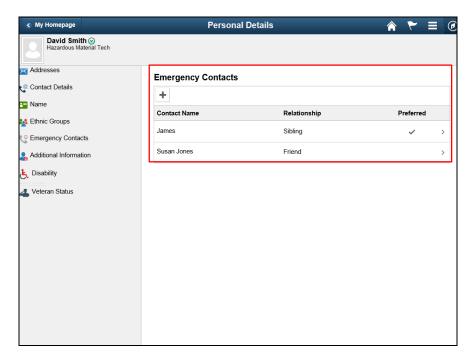
Step	Action
11.	The right side information panel now displays your current name information as stored in the system.
	You can use this page to request that your name information be changed. This action is covered in another topic in Contra Costa County PeopleSoft Employee Self Service eProfile training.
12.	Click the Ethnic Groups link. Ethnic Groups





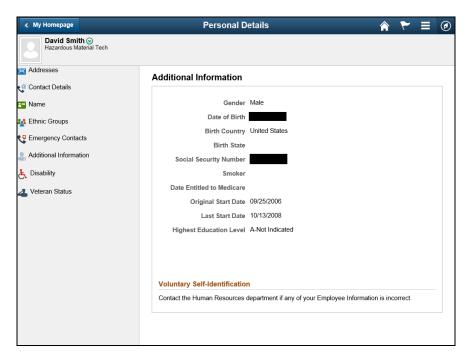
Step	Action
13.	The right side information panel now displays your current Ethnic Group Self Identification.
	You can use this page to edit, add, or delete an ethnic group self identification. These actions are covered in other topics in Contra Costa County PeopleSoft Employee Self Service eProfile training.
14.	Click the Emergency Contacts link. Emergency Contacts





Step	Action
15.	The right side information panel now displays your current emergency contact information.
	You can use this page to add, edit, and/or delete emergency contacts.
	These actions are covered in other topics in Contra Costa County PeopleSoft Employee Self Service eProfile training.
16.	Click the Additional Information link. Additional Information





Step	Action
17.	The right side information panel now displays additional information. This information is presented in view only mode. You cannot edit or delete this information. If any of this information is incorrect, you must contact Human Resources to have it
	changed.
18.	Click the Disability link. Disability
19.	The Voluntary Self-Identification of Disability page displays in the information panel. You can use this page to indicate whether or not you have a disability. Or you can decline to answer.
20.	Click the Veteran Status link. Veteran Status
21.	The Veteran Status page displays in the information panel. Use this page to indicate your status as a veteran If you are not a veteran you can also indicate that using this page.
22.	Click the My Homepage button. My Homepage

Step	Action
23.	
	End of Procedure.

Submitting Name Change Requests

Submitting Name Change Requests

The Employee Self Service feature of PeopleSoft 9.2 allows you to request a name change online.

The steps involved in requesting a name change are covered in a single topic in this lesson:

• Requesting a Name Change

This topic is available for play-back through the UPK player in

- See-It! Mode—allows you to attach a "video" demonstration of the topic
- Try-It! Mode—allows you to use your mouse and keyboard to complete transactions in a simulated environment

Both See-It! And Try-It! provide guided instructions and explanations of important features of PeopleSoft transactions. The full text of the instructions and explanations included in the UPK Payer are also available in two printed documents—a Training Guide and a Job Aid.

Here are some key points to keep in mind about requesting a name change:

- The date you enter in the **Change As Of** field indicates the date on which you want the name change to become effective
- You can enter the current date (the default value), a past date, or a future date in the **Change As Of** field.
- You may be required to supply proof of your name change to Human Resources
- Your name as stored in the system must match your name as it appears on your Social Security Card
- The Current Name section of the Name Change page will continue to display your original name until your request for a name change has been processed by Human Resources.

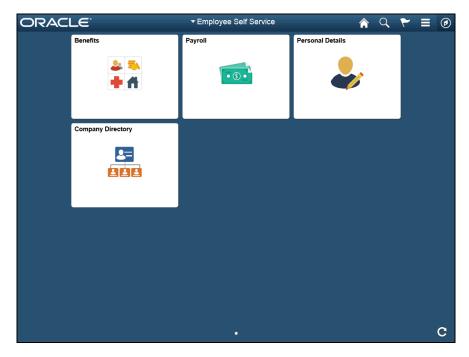
Requesting a Name Change

The basic steps to request a name change are:

- 1. Click the **Personal Details** tile on the **Employee Self Service** home page.
- 2. Click the **Name** link in the **Actions** panel.
- 3. Click on the current row in the **Information** panel.
- 4. Select/enter a date in the **Change As Of** field on the **Name** dialog page.
- 5. Edit your name information using the **Prefix**, **First Name**, **Middle Name**, **Last Name**, and **Suffix** fields.
- 6. Click the **Save** button.

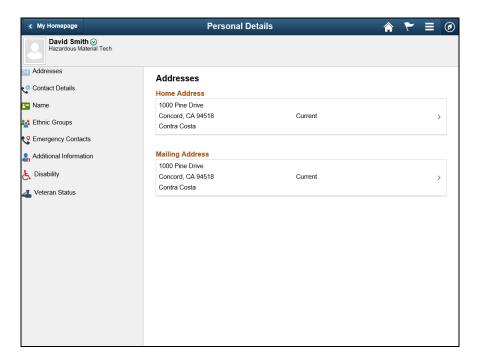


Procedure

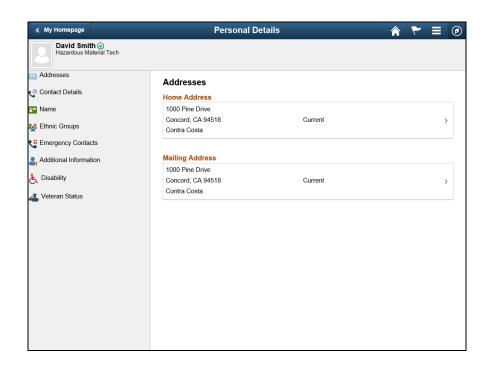




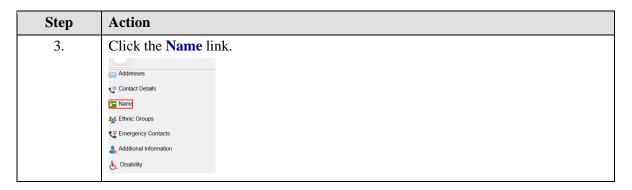


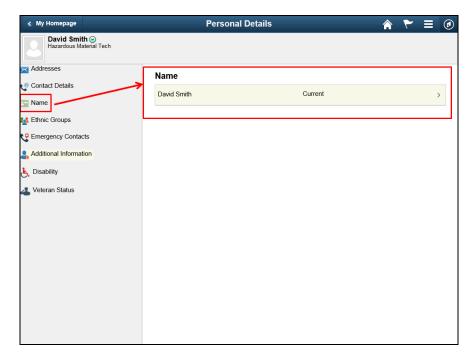


Step Action
2. The Personal Details page displays. You can use this page to view and/or change your personal information.
For this example, you will request that your name as stored in the system be changed from David Smith to David Smyth.



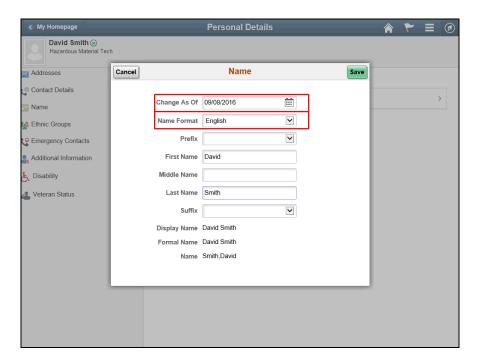


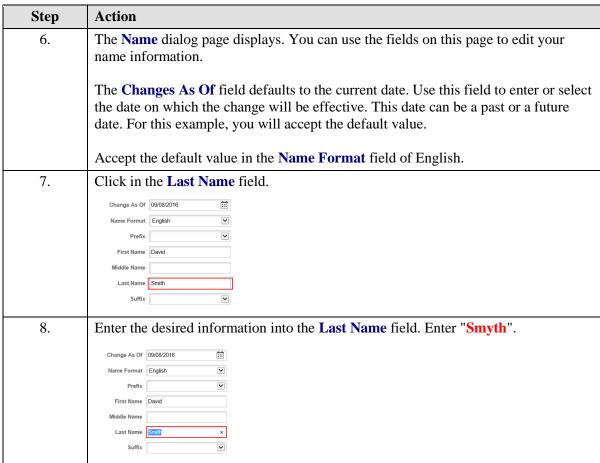




Step	Action
4.	Notice the right side panel now displays the Name grid. This grid lists your name as it is currently stored in the system.
	To edit your name information, you can click anywhere on the row displaying your name.
	In this example, you will correct the spelling of your last name. Your last name is spelled Smyth not as currently listed, Smith.
5.	Click the Current link.
	Name
	David Smith Current >

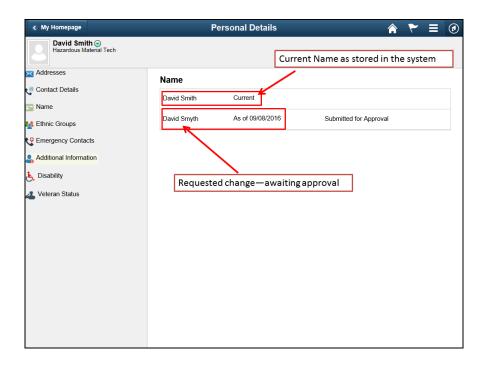












Step	Action
10.	Notice the Name grid in the right panel on the Personal Details page now displays two rows.
	The first row lists your current name as it is stored in the system.
	The second row lists the change you have requested. This row indicates that this new name is as of the current date, 9/8/2016 and that your request has been submitted for approval by Human Resources.
	Human Resources must process your request before the change you have requested will display as your current name.

Step	Action
11.	Click the My Homepage button.
	< My Homepage
	David Smith ⊙ Hazardous Material Tech
	★ Addresses ★ Add
	© Contact Details
12.	
	End of Procedure.

Maintaining Address Information

Maintaining Address Information

the Employee Self Service feature of PeopleSoft 9.2 allows you to review and update your home and mailing addresses that are stored in the system.

The steps involved in requesting a name change are covered in a single topic in this lesson:

Maintaining Home and Mailing Addresses

This topic is available for play-back through the UPK player in

- See-It! Mode—allows you to attach a "video" demonstration of the topic
- Try-It! Mode—allows you to use your mouse and keyboard to complete transactions in a simulated environment

Both See-It! And Try-It! provide guided instructions and explanations of important features of PeopleSoft transactions. The full text of the instructions and explanations included in the UPK Payer are also available in two printed documents—a Training Guide and a Job Aid.

Here are some key points to keep in mind about maintaining your address information:

- You can store two addresses in the system, a home address and a mailing address
- These addresses may be the same or they may be different
- The Change As Of field indicates the date on which the address change should take
 effective
- The Change As Of date can be the current date, a future date, or a past date

Maintaining Home and Mailing Addresses

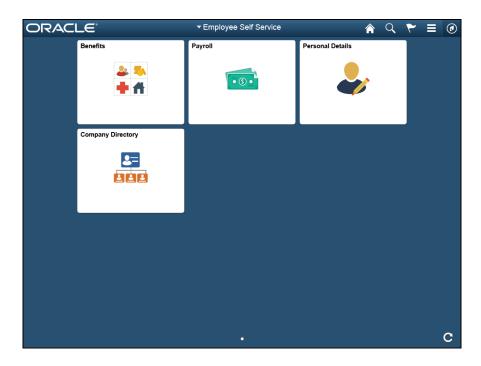
The basic steps to change your address information are:

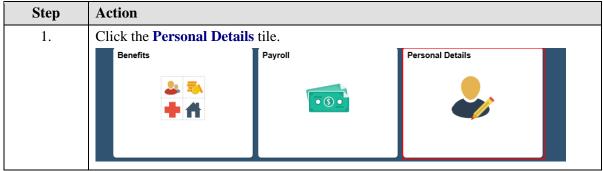
- 1. Click the **Personal Details** tile on the **Employee Self Service** home page.
- 2. Click the **Addresses** link in the **Actions** panel.
- 3. Click the current row in the Information panel for the address you want to change, i.e. Home or Mailing.
- 4. Select/enter a date in the **Change As Of** field on the **Address** dialog page.



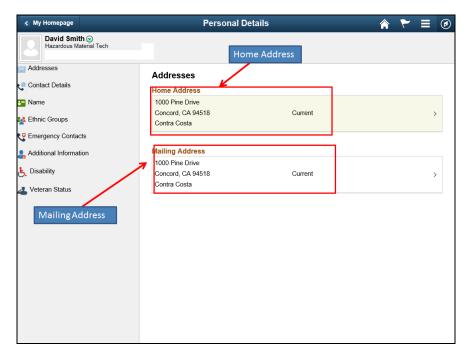
- 5. Edit your name information using the **Address 1**, **Address 2**, **Address 3**, **City**, **State**, **Postal** and **County** fields.
- 6. Click the **Save** button.

Procedure



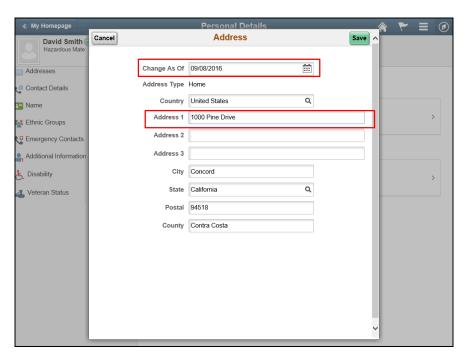


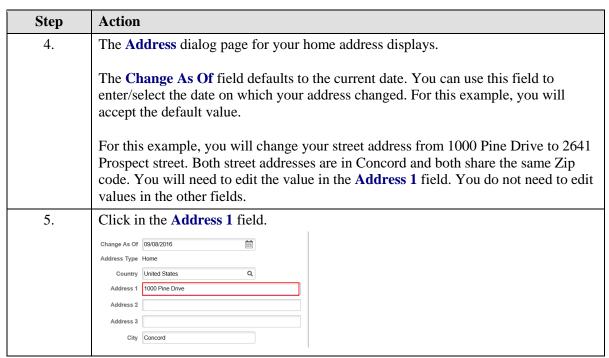




Step	Action
2.	The Information panel displays your current Home and Mailing addresses as they are stored in the system.
	You can edit either or both of these addresses.
	For this example you will edit both your Home and Mailing address. You will change both to:
	2641 Prospect Street Concord, CA 94518
	Note: your home and mailing addresses can be the same or you can have a different mailing address than you home address. Changes to your address information does not require processing by Human Resources. The changes you make are immediately effective.
3.	Click the Home Address row. Home Address
	1000 Pine Drive Concord, CA 94518 Current > Contra Costa

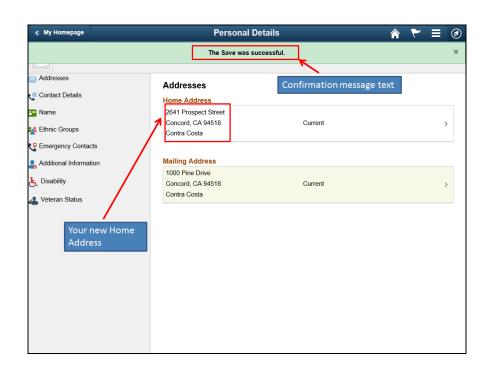






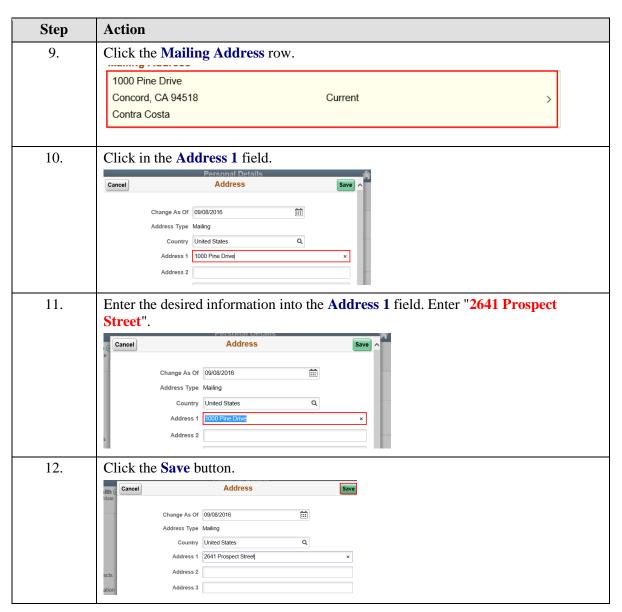


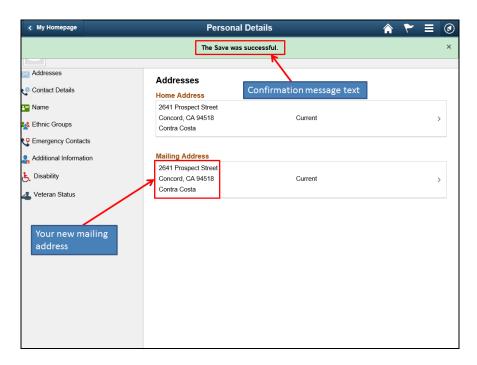
Step	Action
6.	Enter the desired information into the Address 1 field. Enter "2641 Prospect Street".
	Change As Of 09/08/2016 :::
	Address Type Home
	Country United States Q
	Address 1 1000 Pine Drive x
	Address 2
7.	Click the Save button.
	Address
	Change As Of 09/08/2016
7.	Change As Of 09/08/2016 ::: Address Type Home Country United States Q



Step	Action
8.	Notice the system displays a confirmation message indicating that the changes you just made have been successfully.
	Your current home address is now listed as 2641 Prospect Street in Concord.
	Next you will make the same change to your mailing address.









Maintaining Phone Information

Maintaining Phone Information

The Employee Self Service feature of PeopleSoft 9.2 allows you to review and update your phone numbers that are stored in the system.

The steps involved in maintaining phone information are covered in a three topics in this lesson:

- Editing an Existing Phone Number
- Adding an Additional Phone Number
- Deleting a Phone Number



This topic is available for play-back through the UPK player in

- See-It! Mode—allows you to attach a "video" demonstration of the topic
- Try-It! Mode—allows you to use your mouse and keyboard to complete transactions in a simulated environment

Both See-It! And Try-It! provide guided instructions and explanations of important features of PeopleSoft transactions. The full text of the instructions and explanations included in the UPK Payer are also available in two printed documents—a Training Guide and a Job Aid.

Here are some key points to keep in mind about maintaining your phone number information:

- The system stores four types of phone numbers—Business, Home, Pager 1 and Mobile (Cell)
- The Business phone number should always be designated as your preferred phone number
- You cannot have multiple preferred phone numbers
- You cannot have multiple Mobile phone numbers in the system
- If you already have a Mobile phone number listed in the Phone Numbers section and you use the **Add Phone Number** button you will not be able to add an additional phone number. The drop down for the **Phone Type** field will be empty. You cannot have multiple phone numbers of the same type in the system.

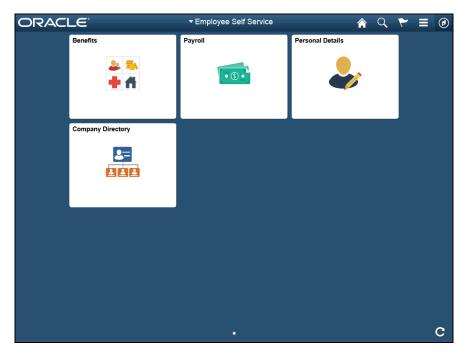
Editing an Existing Phone Number

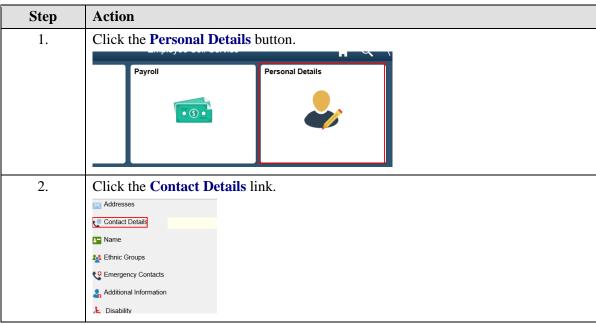
The basic steps to edit an existing phone number are:

- 1. Click the **Personal Details** tile on the **Employee Self Service** home page.
- 2. Click the **Contact Details** link in the **Actions** panel.
- 3. Click the current row in the **Information** panel **Phone** grid for the phone number you want to change
- 4. Edit your phone number information using the **Number** and **Extension** fields.
- 5. Click the **Save** button.

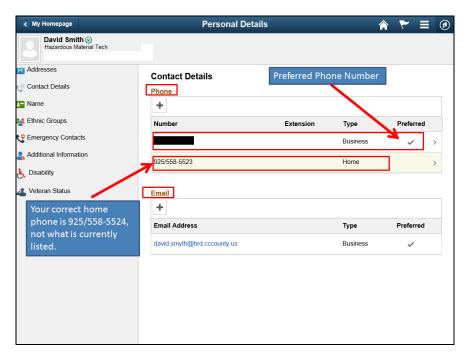
Procedure

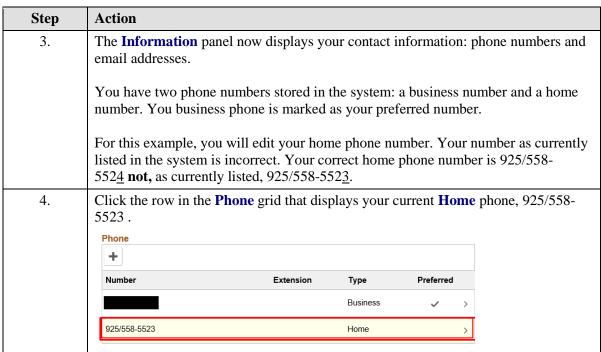




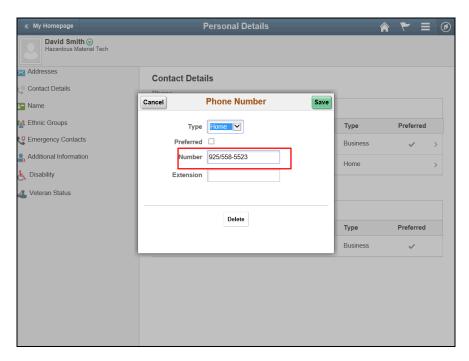


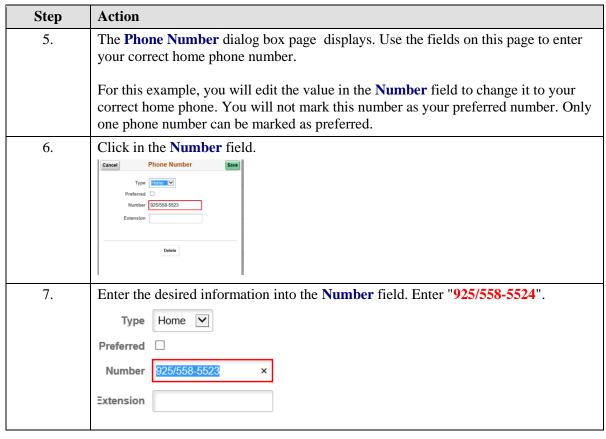




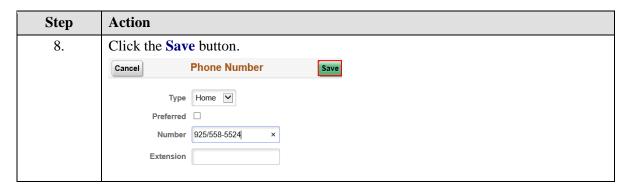


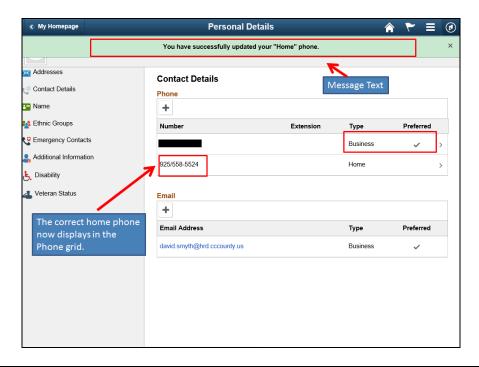












Step	Action
9.	Notice the system issues a message across the top of the page indicating that you have successfully updated your home phone. Also notice that the Phone grid now lists the correct number for your home phone and that your business number is still your preferred number.
10.	Click the My Homepage button.
	♦ My Homepage Personal Details
	David Smith ⊙ Hazardous Material Tech
11.	E. J. & D J
	End of Procedure.

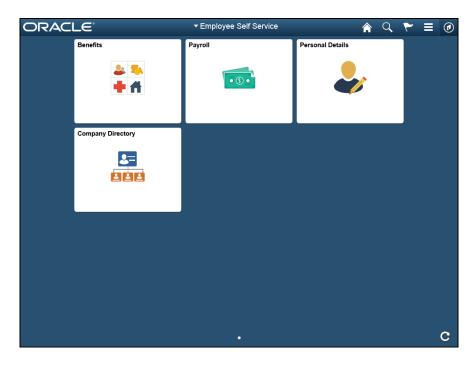


Adding an Additional Phone Number

The basic steps to adding a new phone number are:

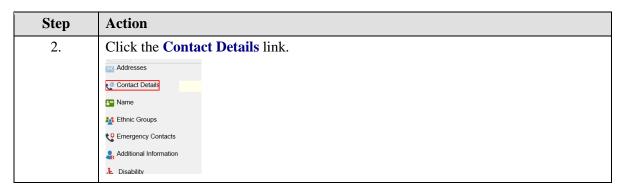
- 1. Click the **Personal Details** tile on the **Employee Self Service** home page.
- 2. Click the **Contact Details** link in the **Actions** panel.
- 3. Click the **Add Phone** button (**Plus** sign) in the **Phone** grid.
- 4. Select a type in the Type field on the **Phone Number** dialog page.
- 5. Edit your phone number information using the **Number** and **Extension** fields.
- 6. Click the **Save** button.

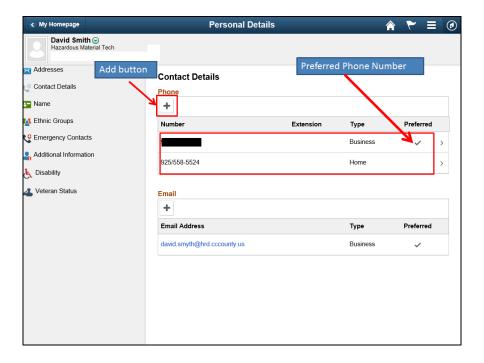
Procedure





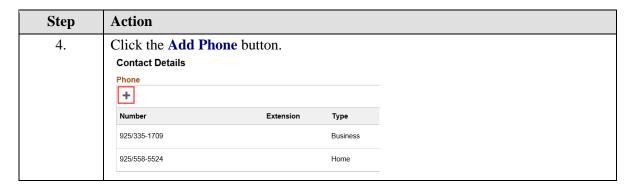


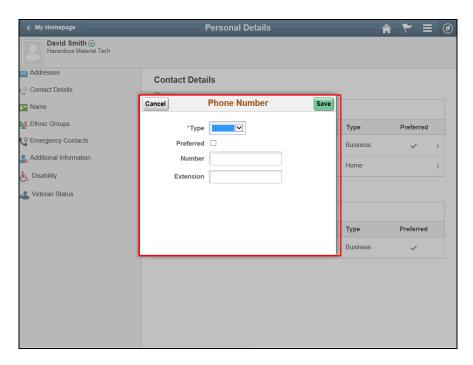


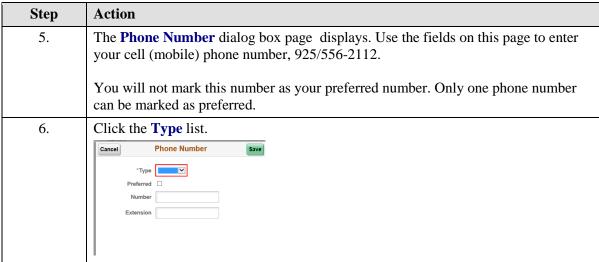


Step	Action
3.	The Information panel now displays your contact information: phone numbers and email addresses.
	You currently have two phone numbers stored in the system: a business number and a home number. Your business phone is marked as your preferred number.
	For this example, you will add your cell (mobile) phone number, 925/556-2112, to the system. You will leave the business phone as your preferred phone.

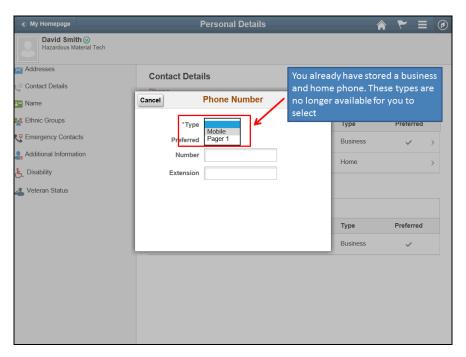






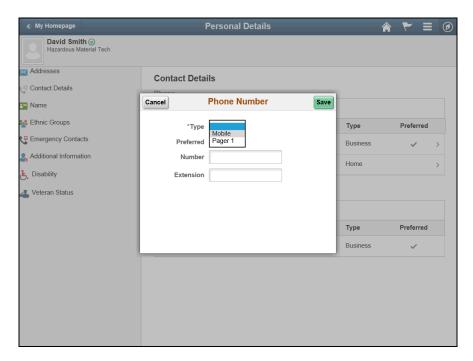


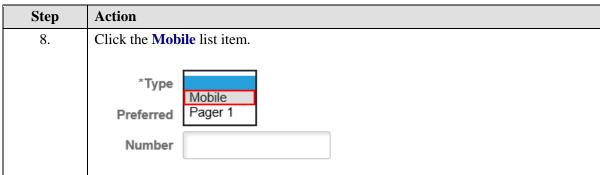




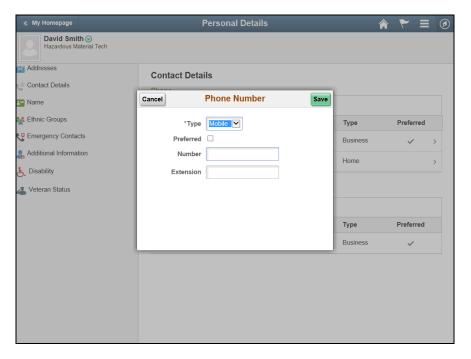
Step	Action
7.	Notice the Type field drop down lists contains only two types: Mobile and Page 1. You can store up to 4 phone numbers in the systemone of each of the following types:
	Business Home Mobile Pager 1
	You cannot simultaneously store two phone numbers of the same type in the system. The system only allows you to select phone types that are currently available to you.

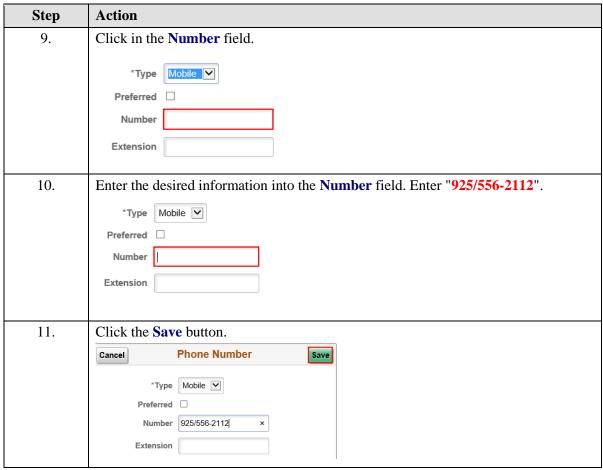




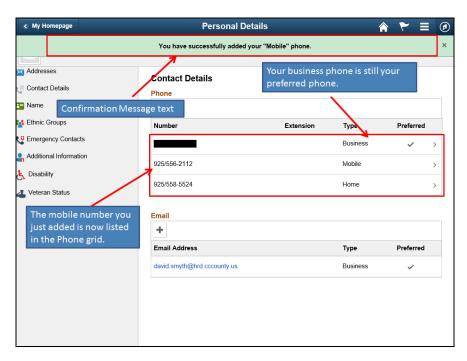












Step	Action	
12.	have successfully added your mo	now lists three phone types and that your business
13.	Click the My Homepage button.	
	∢ My Homepage	Personal Details
	David Smith → Hazardous Material Tech	
	Addresses Contact Details	Contact Details
14.		
	End of Procedure.	

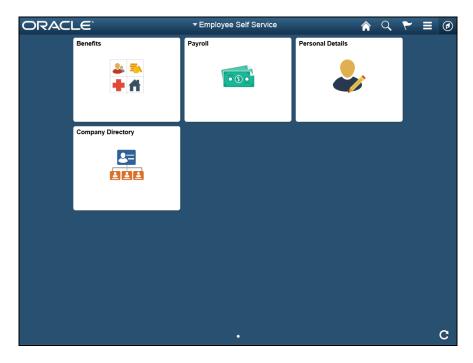
Deleting a Phone Number

The basic steps to deleting an existing phone number are:

- 1. Click the **Personal Details** tile on the **Employee Self Service** home page.
- 2. Click the **Contact Details** link in the **Actions** panel.
- 3. Click on the row on the **Phone** grid for the phone number you want to delete.
- 4. Click the **Delete** button on the **Phone Number** dialog page.
- 5. Click the **Yes** button on the **Delete Confirmation** page.

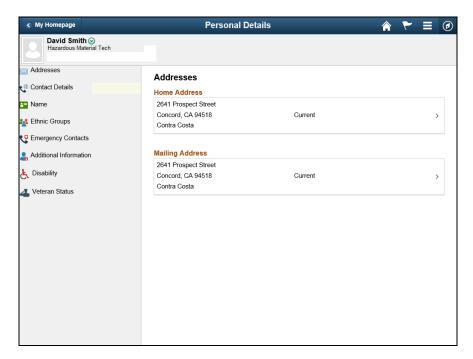


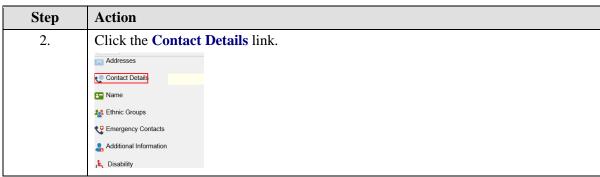
Procedure



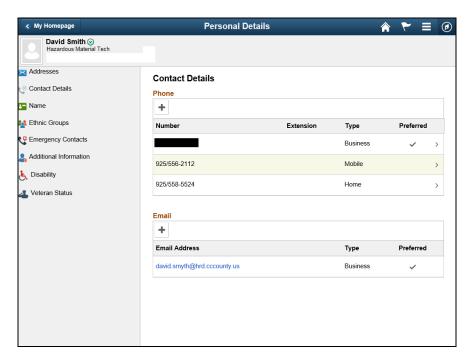


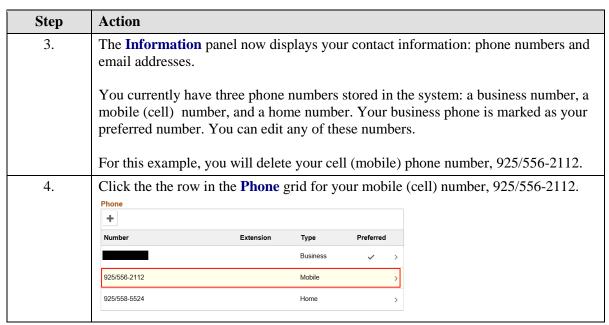




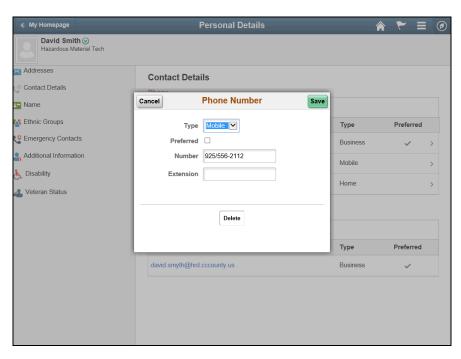


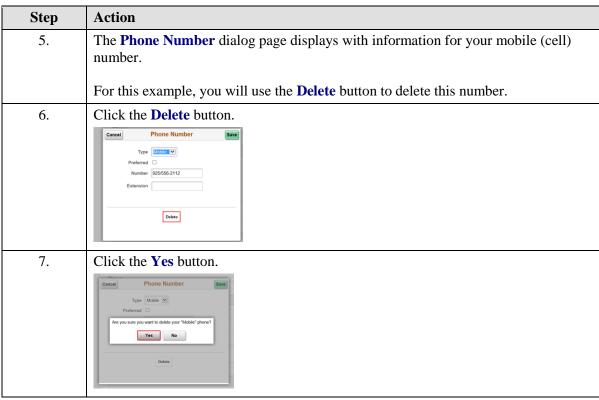




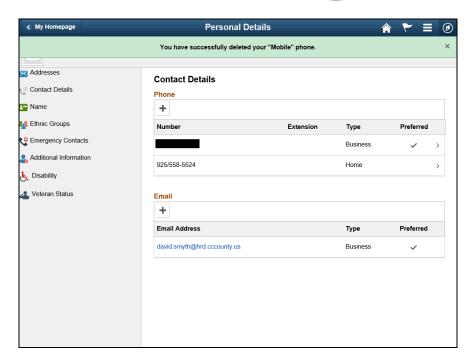


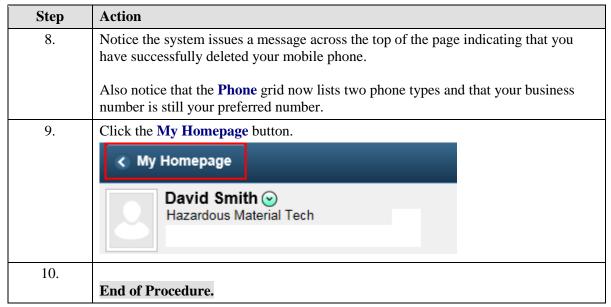












Maintaining Email Addresses

Maintaining Email Addresses

The Employee Self Service feature of PeopleSoft 9.2 allows you to review and update your email addresses that are stored in the system.

The steps involved in maintaining email addresses are covered in a three topics in this lesson:

- Adding an Email Addresses
- Editing an Email Address
- Deleting an Email Address



This topic is available for play-back through the UPK player in

- See-It! Mode—allows you to attach a "video" demonstration of the topic
- Try-It! Mode—allows you to use your mouse and keyboard to complete transactions in a simulated environment

Both See-It! And Try-It! provide guided instructions and explanations of important features of PeopleSoft transactions. The full text of the instructions and explanations included in the UPK Payer are also available in two printed documents—a Training Guide and a Job Aid.

Here are some key points to keep in mind about maintaining your email address information:

- The system stores two types of email Addresses—Business and Home
- You cannot edit or delete your Business email address
- The Business email address should always be designated as your primary email address
- You cannot have multiple primary email Addresses
- You cannot have multiple Home email addresses in the system
- If you already have a Home email address listed in the Email Addresses section and you use the **Add Email Address** button you will not be able to add an additional email address. The drop down for the **Email Type** field will be empty. You cannot have multiple email addresses of the same type in the system.

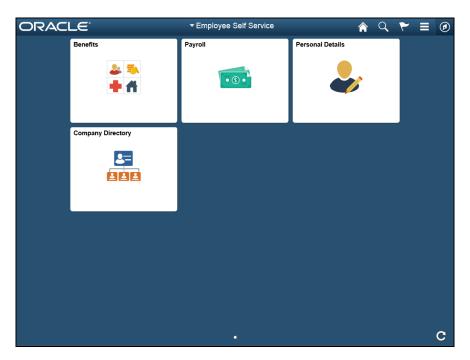
Adding an Email Address

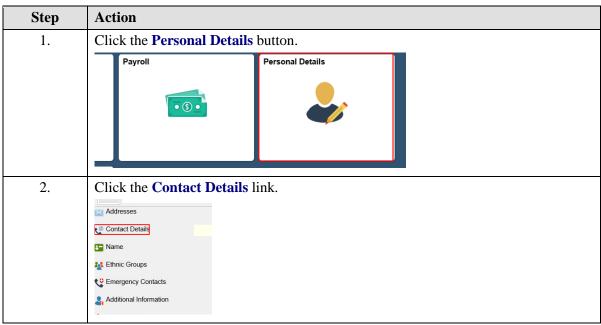
The basic steps to adding a new email address are:

- 1. Click the **Personal Details** tile on the **Employee Self Service** home page.
- 2. Click the **Contact Details** link in the **Actions** panel.
- 3. Click the **Add Email** button (**Plus** sign) in the **Email** grid.
- 4. Select a type in the **Email Type** field on the **Email Address** dialog page..
- 5. Edit your email information using the **Email Address** field.
- 6. Click the **Save** button.

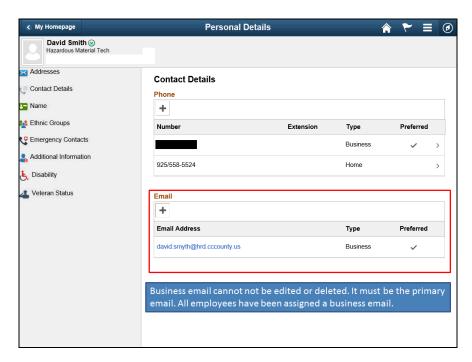
Procedure

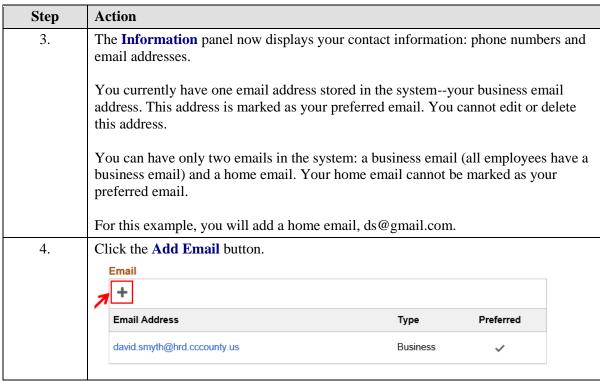




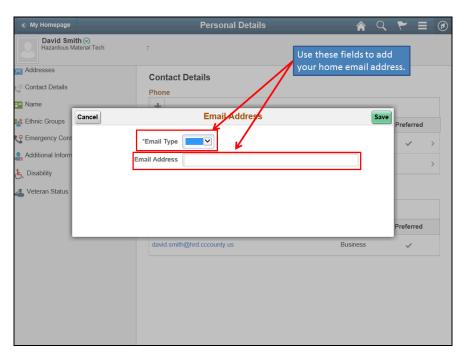






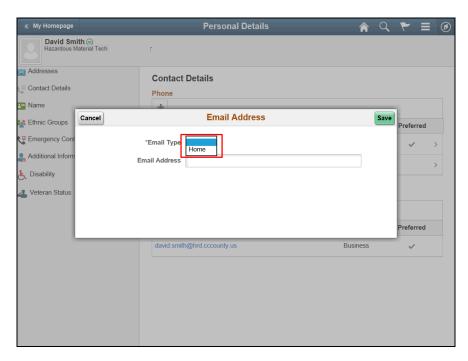




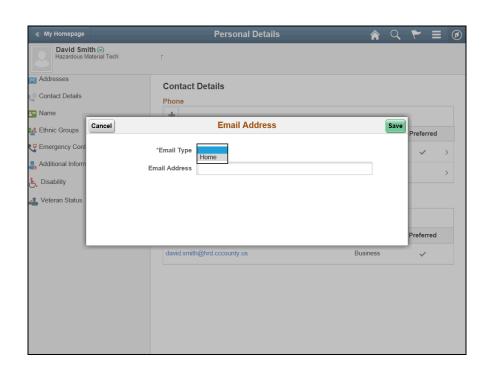


Step	Action
5.	The Email Address dialog page displays. Use the Email Type and Email Address fields to enter your home email address, ds@gmail.com.
6.	Click the Email Type list. Email Address *Email Type Email Address

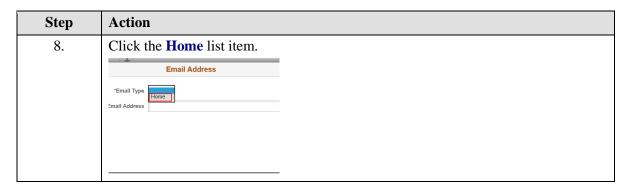


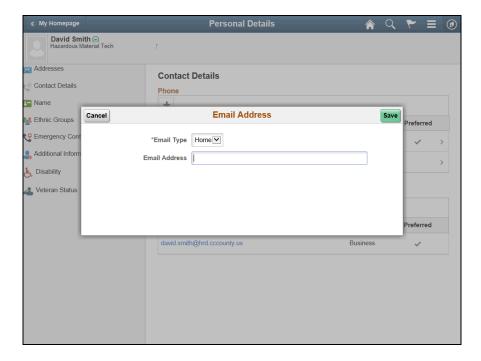


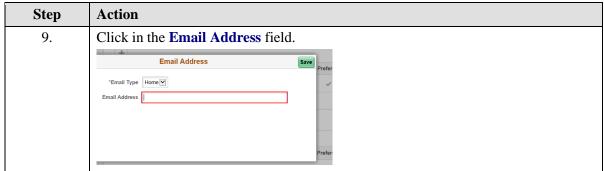
Step	Action
7.	Note you can only store two email addresses in the system, a business email (every employee has been assigned a business email) and a home email. You can list only one home email address.
	Home is the only choice available.



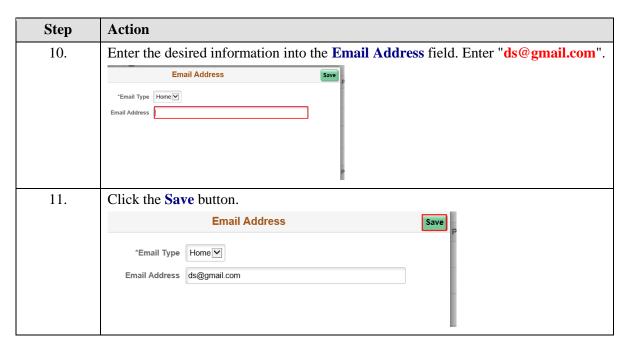


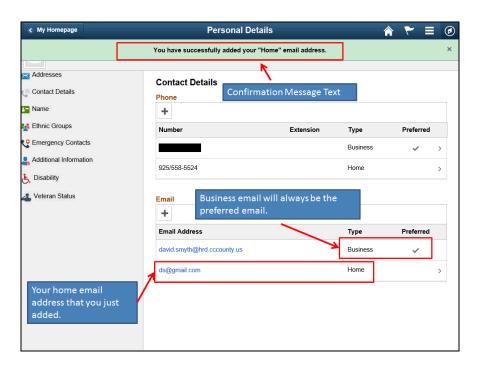












Step	Action
12.	Notice the system issues a message across the top of the page indicating that you have successfully added your home email address.
	Also notice that the Email grid now lists 2 email types and that your business number is still your preferred email address.



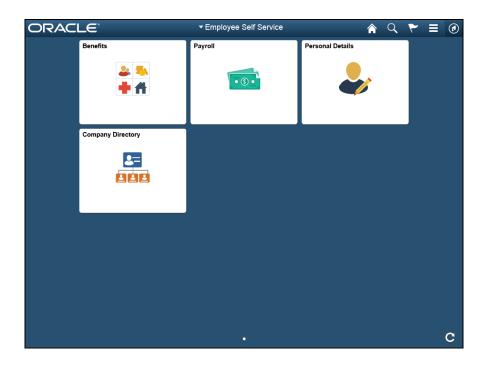


Editing Email Addresses

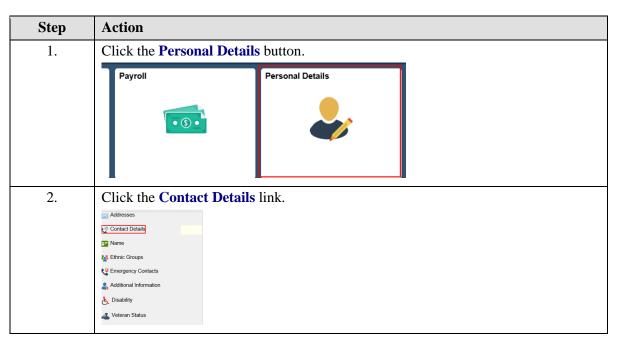
The basic steps to edit an existing email address are:

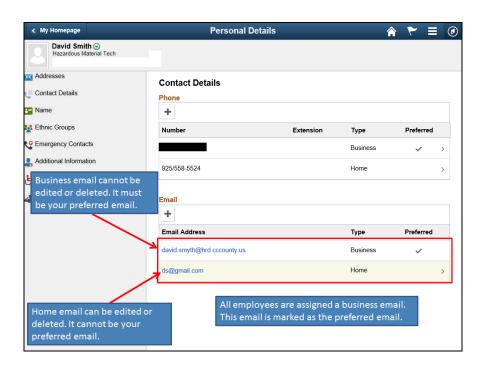
- 1. Click the **Personal Details** tile on the **Employee Self Service** home page.
- 2. Click the **Contact Details** link in the **Actions** panel.
- 3. Click the current row in the **Information** panel **Email** grid for the email address you want to change.
- 4. Edit your email address information using the **Email Address** field.
- 5. Click the **Save** button.

Procedure



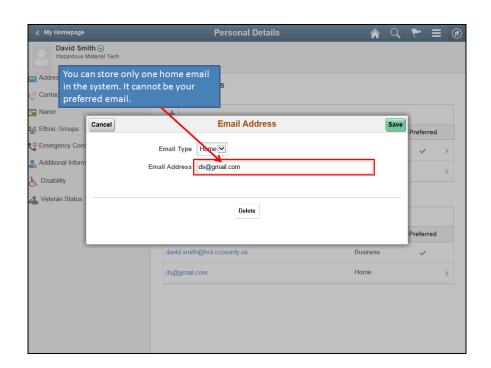




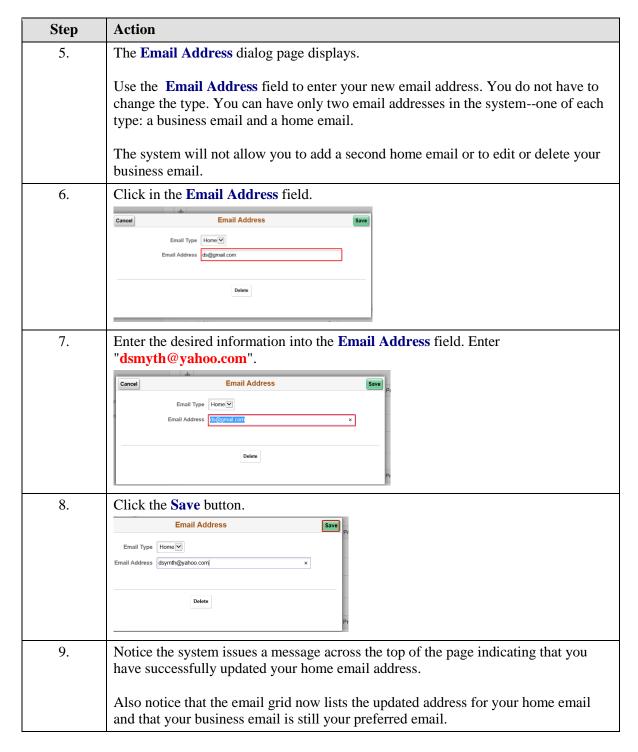




Step	Action
3.	The Information panel now displays your contact information: phone numbers and email addresses.
	You have two email addresses stored in the system: a business email and a home email. Your business email is marked as your preferred email.
	You cannot edit or delete your business email. It must be your preferred email.
	You can edit your home email.
	For this example, you will edit your home email address. You will change it from ds@gmail.com to dsmyth@yahoo.com.
4.	Click the row in the Email grid containing your home email address, ds@gmail.com. Email +
	Email Address Type Preferred
	david.smyth@hrd.cccounty.us Business
	ds@gmail.com Home >









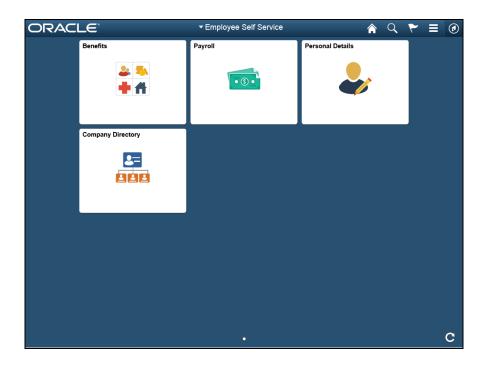
Step	Action
10.	Click the My Homepage button. My Homepage
	David Smith Hazardous Material Tech
11.	
	End of Procedure.

Deleting an Email Address

The basic steps to deleting an existing email address are:

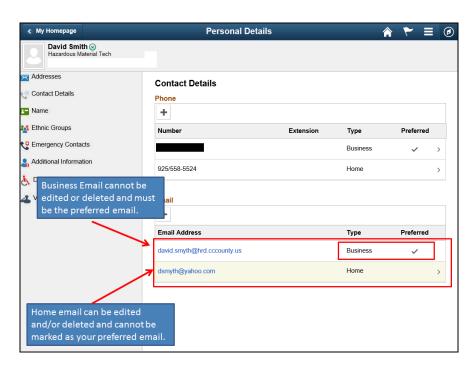
- 1. Click the **Personal Details** tile on the **Employee Self Service** home page.
- 2. Click the **Contact Details** link in the **Actions** panel.
- 3. Click on the row on the **Email** grid for the email address you want to delete.
- 4. Click the **Delete** button on the **Email address** dialog page.
- 5. Click the **Yes** button on the **Delete Confirmation** page.

Procedure



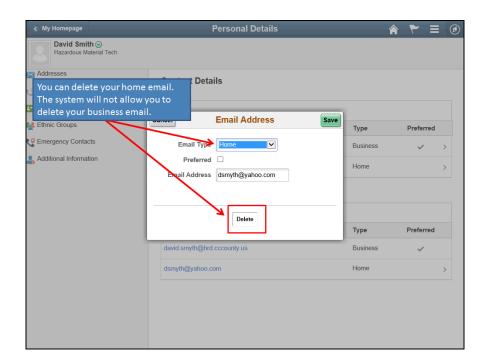






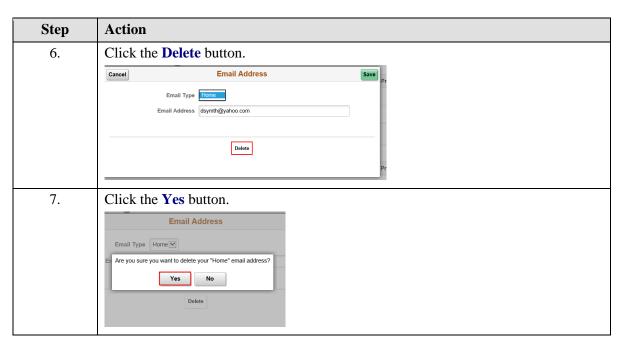


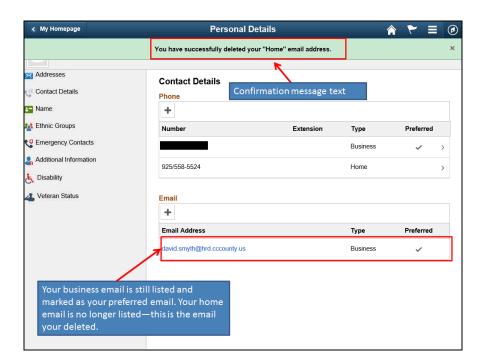
Step	Action
3.	The Information panel now displays your contact information: phone numbers and email addresses.
	You currently have 2 email addresses stored in the system: a business email and a home email. Your email is marked as your preferred email. You cannot edit or delete this email. It must be your preferred email. For this example, you will delete your home email, dsmyth@yahoo.com.
4.	Click the row in the Email grid containing your home email, dsmyth@yahoo.com.
	Email Address Type Preferred
	david.smyth@hrd.cccounty.us Business
	dsmyth@yahoo.com Home



Step	Action
5.	The Email Address dialog page displays with information for your home email address.
	For this example, you will use the Delete button to delete this address.







Step	Action
8.	Notice the system issues a message across the top of the page indicating that you have successfully deleted your home email address.
	Also notice that the Email grid now lists one emailyour business email address and that this address is marked as your preferred email address.



Step	Action
9.	Click the My Homepage button. My Homepage David Smith Hazardous Material Tech
10.	End of Procedure.

Maintaining Emergency Contact Information

Maintaining Emergency Contact Information

The Employee Self Service feature of PeopleSoft 9.2 allows you to review and update your emergency contact information that are stored in the system.

The steps involved in requesting managing emergency contact information are covered in a four topics in this lesson:

- Adding Emergency Contact Information
- Editing Emergency Contact Information
- Adding an Additional Emergency Contact
- Deleting an Emergency Contact

This topic is available for play-back through the UPK player in

- See-It! Mode—allows you to attach a "video" demonstration of the topic
- Try-It! Mode—allows you to use your mouse and keyboard to complete transactions in a simulated environment

Both See-It! And Try-It! provide guided instructions and explanations of important features of PeopleSoft transactions. The full text of the instructions and explanations included in the UPK Payer are also available in two printed documents—a Training Guide and a Job Aid.

Here are some key points to keep in mind about maintaining your emergency contact information:

- You can designate multiple emergency contacts
- There is no limit to how many emergency contacts you can add
- If you have only one emergency contact, that contact will be designated your preferred contact by default
- If you have more than one emergency contact, you must select one to be your preferred contact
- You cannot have more than one preferred emergency contact
- You cannot delete the preferred emergency contact
- If you have only one contact and want to delete that contact, you must
 - o First add a new emergency contact
 - Second make the new contact your preferred contact
 - o Third, then you will be able to delete the original contact

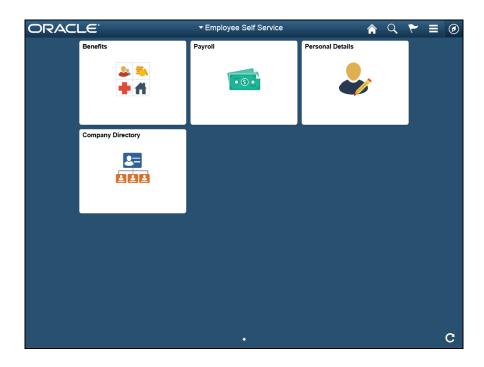


Adding Emergency Contact Information

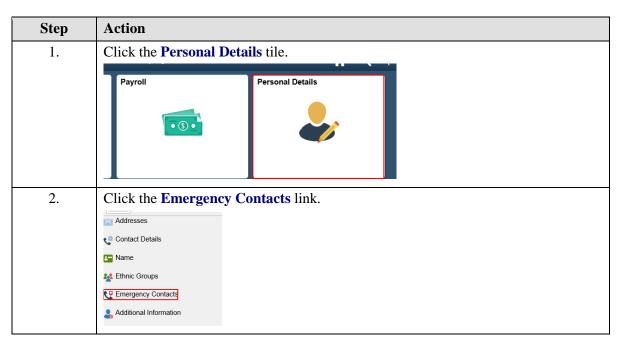
The basic steps to adding an emergency contact are:

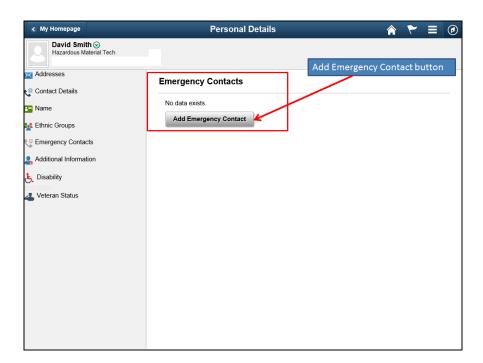
- 1. Click the **Personal Details** tile on the **Employee Self Service** home page.
- 2. Click the **Emergency Contacts** link in the **Actions** panel.
- 3. Click the Add Emergency Contact button (Plus sign) in the Emergency Contacts grid.
- 4. Enter the contact's name (first and last name) in the **Contact Name** field on the **Emergency Contact** dialog page.
- 5. Select a value in the Relationship field.
- 6. Select the **Preferred** checkbox (optional if another contact is the preferred contact)
- 7. Click the **Add Address** button.
- 8. Enter the contact's address information on the **Address** dialog page or select the **Same as** mine checkbox (and then click the **Done** button).
- 9. Click the **Done** button.
- 10. Click the **Add Phone Number** button on the **Emergency Contact** dialog page.
- 11. Select a value in the **Type** field on the **Phone Number d**ialog page or select the **Same as mine** check box (and then click the **Done** button).
- 12. Enter the contact's phone number in the **Number** field.
- 13. Enter the extension, if any, in the **Extension** field.
- 14. Click the **Done** button
- 15. Click the **Save** button.

Procedure



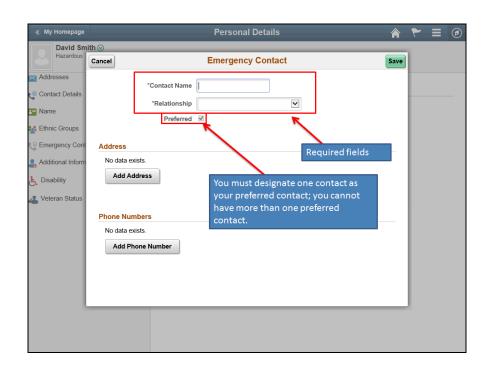




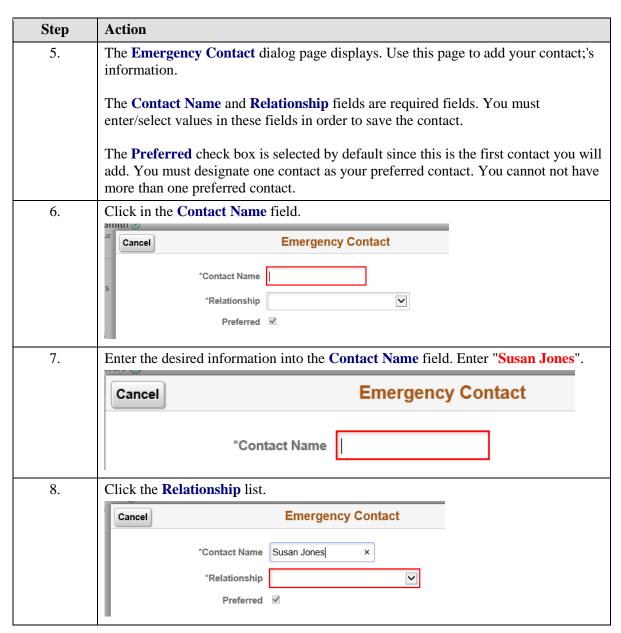




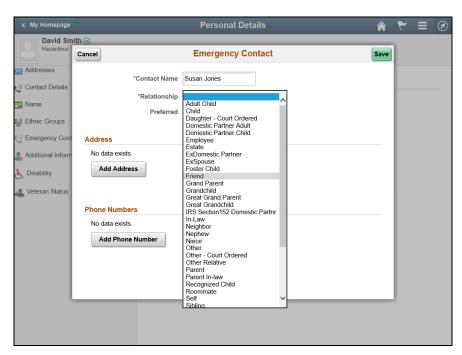
Step	Action	
3.	The Emergency Contacts page displays in the Information panel. Currently you have no emergency contacts listed in the system. Use the Add Emergency Contact button to add a contact.	
	For this example, you will add Susan Jones, a friend. Susan's contact information is: 1803 Devon Court Concord, CA 94520 510/556-4896 (cell phone)	
4.	Click the Add Emergency Contact button. David Smith ⊙ Hazardous Material Tech Addresses Emergency Contacts No data exists. No data exists. Add Emergency Contact	



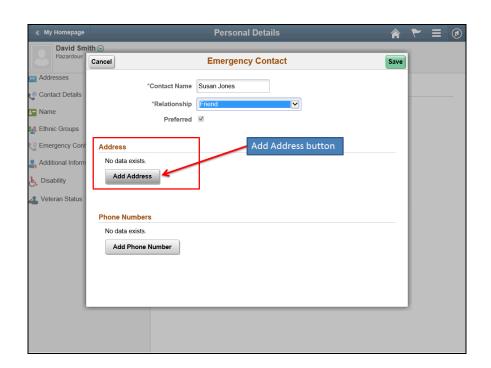






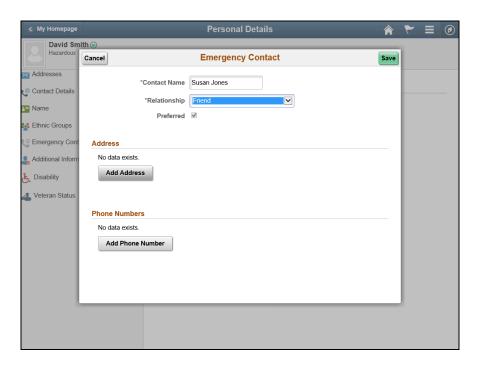


Step	Action
9.	Click the Friend list item.
	Friend



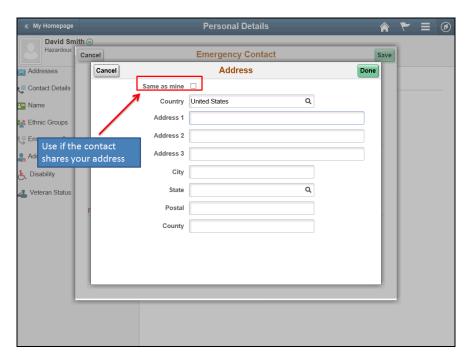


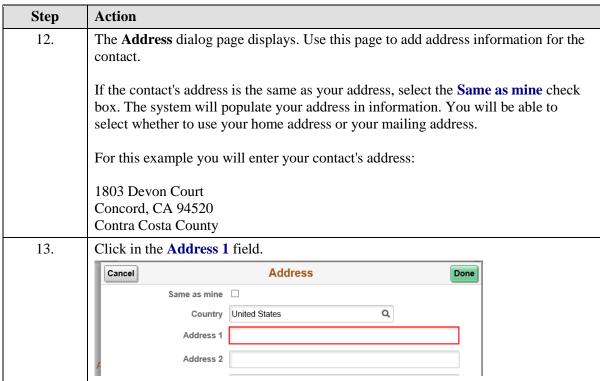
Step	Action
10.	Next, you will add address information for the contact. Address information is optional. You can save a contact without adding any address information.
	Use the Add Address button in the Address grid to begin adding address information for the contact.



Step	Action
11.	Click the Add Address button.
	Address
	No data exists.
	Add Address









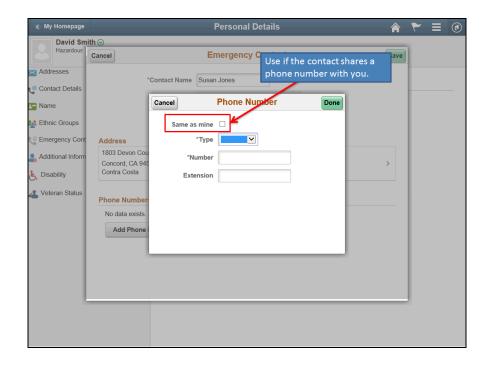
Step	Action
14.	Enter the desired information into the Address 1 field. Enter "1803 Devon Court".
	Cancel Address Done
	Same as mine
	Country United States Q
	Address 1
	Address 2
15.	Click in the City field.
	Same as mine
	Country United States Q _x
	Address 2
	Address 3
	City
	State Q
16.	Enter the desired information into the City field. Enter " Concord ".
	Address 1 1803 Devon Court
	Address 2
	Address 3
	City
	State Q
17.	Click in the State field.
	Country United States Q
	Address 1 1803 Devon Court
	Address 2
	Address 3
	City Concord
	State Q. Postal
18.	Enter the desired information into the State field. Enter "CA".
	Same as mine Country United States Q
	Address 1 1803 Devon Court
	Address 2
	Address 3
	City Concord
	State Q.
19.	Click the Ca object.
	CA California
	CA California



Step	Action
20.	Click in the Postal field.
	Address 2
	Address 3
	City Concord
	State California × Q
	Postal
	County
21.	Enter the desired information into the Postal field. Enter "94520".
	Address 1 803 Devon Court
	Address 2
	Address 3
	City Concord State California Q
	Postal
	County
22.	Click in the County field.
	Address 1 1803 Devon Court
	Address 2 Address 3
	City Concord
	State California Q
	Postal 94520 ×
	County
23.	Enter the desired information into the County field. Enter " Contra Costa ".
	City Concord
	State California Q
	Postal 94520
	County
24.	Click the Done button.
	Cancel Address Done
	Same as mine
	Country United States Q
	Address 1 1803 Devon Court
	Address 2

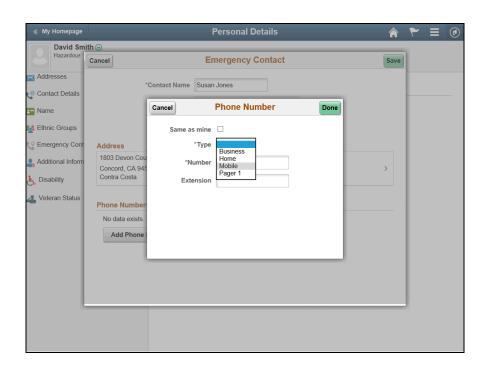


Step	Action
25.	Notice the Address grid now displays the address you just entered.
	Next, you will enter phone information for your contact. Phone information is required. You cannot save the contact without entering phone information.
	For this example, you will use your contact's cell (mobile) number:
	510/556-4896
	Use the Add Phone Number button to begin adding your contact's phone information.
26.	Click the Add Phone Number button.
	Phone Numbers
	No data exists.
	Add Phone Number

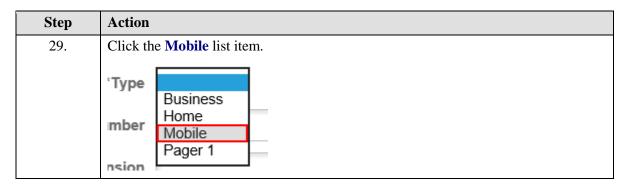


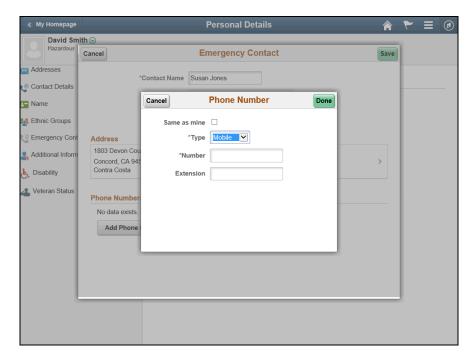


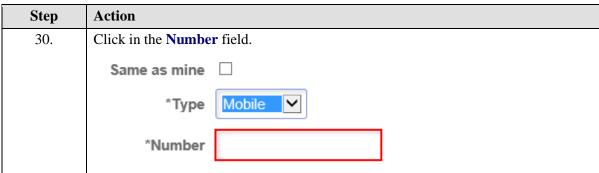
Step	Action
27.	The Phone Number dialog page displays. The Type and Number fields are required fields. You must enter/select a value in these fields in order to save the phone information.
	If your contact shares a phone with you, you can use the Same as mine checkbox. The system will populate the fields on this page with your phone information. If you have stored more than one type of phone information in the system, you can use the Type field to select the phone number you want to use for the contact. You cannot edit your phone information using this page.
	For this example, you will use your contact's cell (mobile) phone number:
	510/556-4896.
28.	Click the Type list.
	Same as mine
	*Type





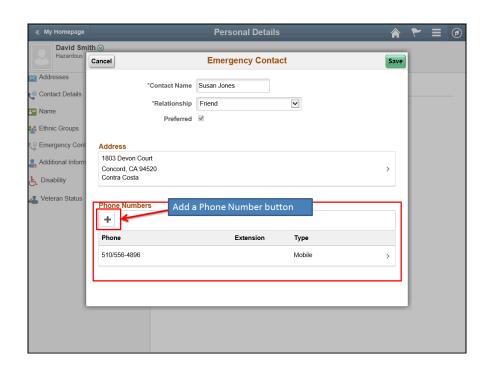






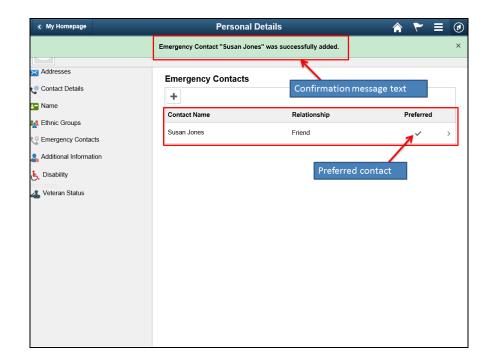


Step	Action
31.	Enter the desired information into the Number field. Enter "510/556-4896".
	Same as mine
	*Type Mobile 🔽
	*Number
32.	Click the Done button.
	Phone Number Done
	Same as mine
	*Type Mobile 🗹
	*Number 510/556-4896 ×





Step	Action	
33.	The Emergency Contact dialog page displays. The Phone Number grid now displays the phone number you just added. You can use the Add Phone Number button (the Plus sign) to additional phone numbers. You can store up to 4 phone numbers for a contact, one of each of the following types: Business Home Mobile	
	Mobile Pager 1	
	You cannot list multiple phone numbers for a type., e.g. you cannot list two business phones or two home phones, etc.	
34.	Click the Save button.	
	Emergency Contact Save	
	*Contact Name Susan Jones *Relationship Friend ✓ Preferred ✓	





Step	Action		
35.	Notice the system displays a confirmation message indicating that you successfully added an emergency contact.		
	The Emergency Contact grid now displays a single contact, Susan Jonesthe contact you just added. This contact is listed as your preferred contact.		
	You must designate one contact as your preferred contact and you can have only one contact designated as preferred.		
36.	Click the My Homepage button.		
	< My Homepage		
	David Smith Hazardous Material Tech		
37.			
	End of Procedure.		

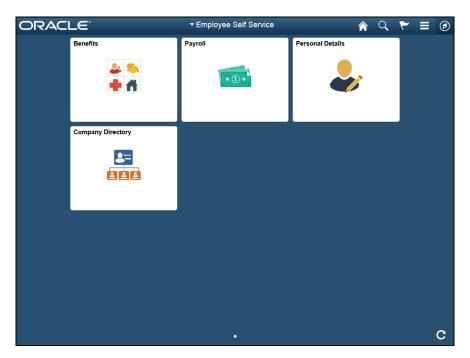
Editing Emergency Contact Information

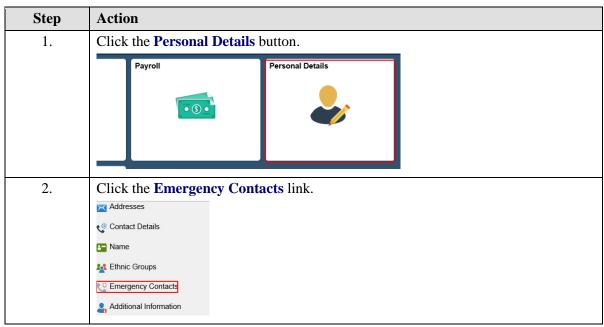
The basic steps to edit an emergency contact are:

- 1. Click the **Personal Details** tile on the **Employee Self Service** home page.
- 2. Click the **Emergency Contacts** link in the **Actions** panel.
- 3. Click on the row on the **Emergency Contacts** grid for the contact you want to edit
- 4. Edit the contact's name, address, and/or phone using the fields on **the Emergency Contact** dialog page.
- 5. Click the **Save** button.

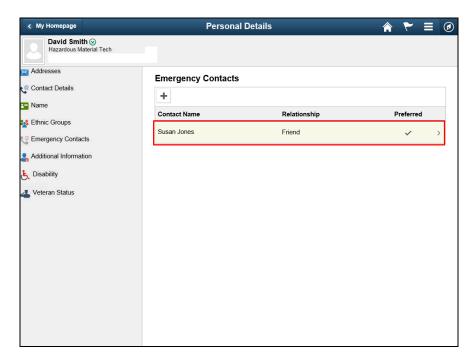
Procedure

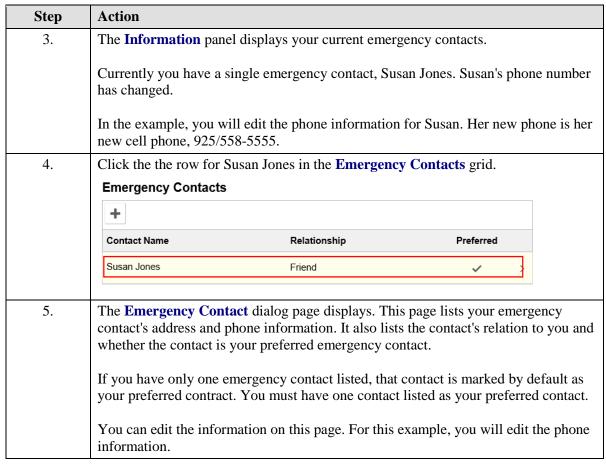






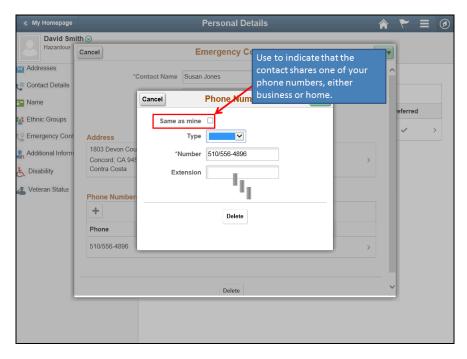








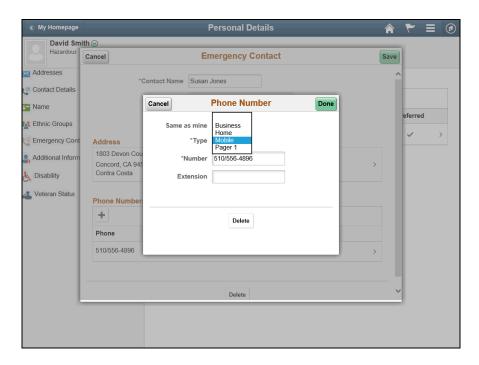
Step	Action				
6.	Click the row in the Pho this case, click the row for	•	•	ou want to e	edit. In
	Note: you can use the Pl phones for this contact. I	•	· · · · · · · · · · · · · · · · · · ·		
	Phone	Extension	Туре		
	510/556-4896		None	>	
					,



Step	Action
7. The Phone Number dialog page displays. Use this page to edit the conta information.	
	Use the Same as mine check box to indicate that the contact shares a phone with you. If you have a home and business number listed, you can select which will be associated with the contact.
	For this example, Susan does not share phone number with you.
	You will change the number listed to indicate that the new number is 925/558-5555 and that this is her Mobile phone.

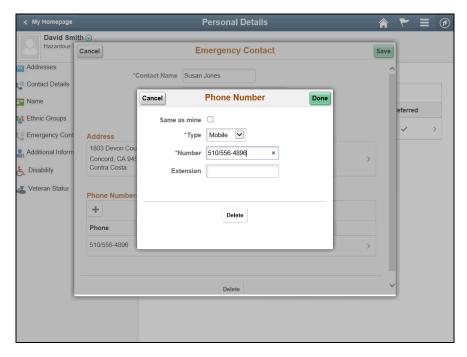


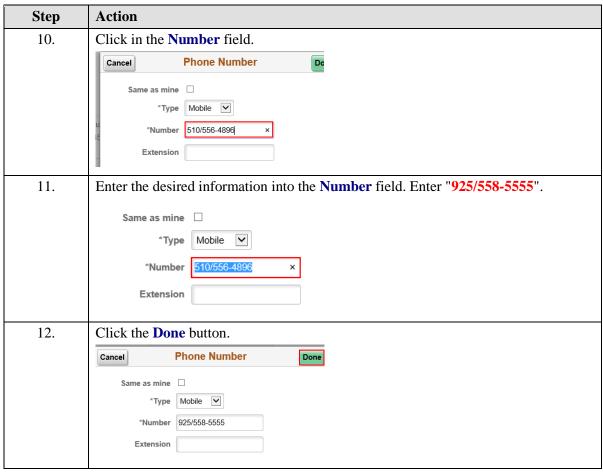




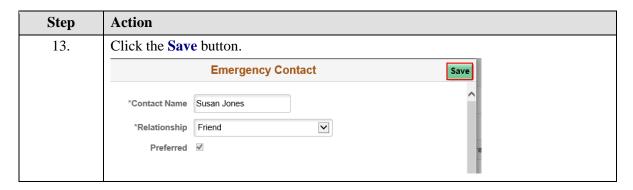
Step	Action	
9.	Click the Mobile list item.	
	Same as mine Business Home	
	*Type Mobile Pager 1	
	*Number 510/556-4896	
	Extension	

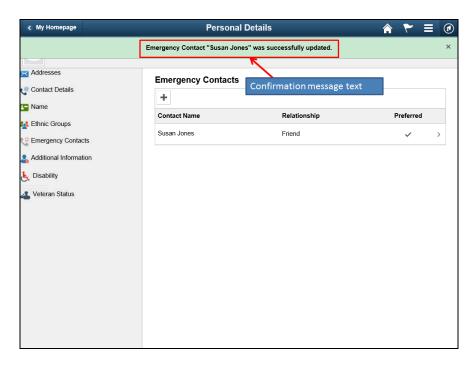












Step	Action
14.	The system displays a confirmation message indicating that the contact's information was successfully updated.
15.	Click the My Homepage button.
	∢ My Homepage
	David Smith Hazardous Material Tech
16.	
	End of Procedure.

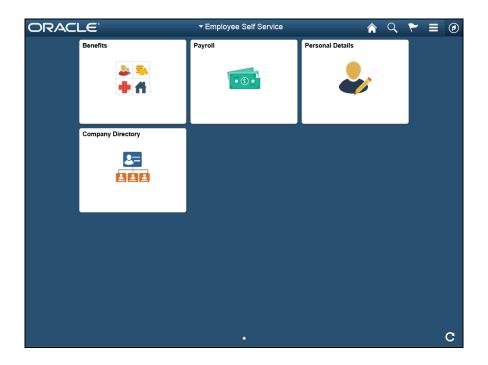


Adding an Additional Emergency Contact

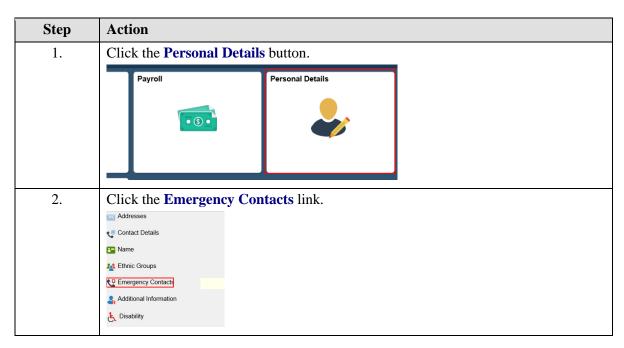
The basic steps to adding an emergency contact are:

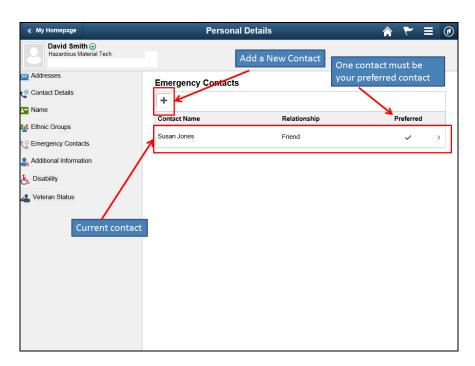
- 1. Click the **Personal Details** tile on the **Employee Self Service** home page.
- 2. Click the **Emergency Contacts** link in the **Actions** panel.
- 3. Click the Add Emergency Contact button (Plus sign) in the Emergency Contacts grid.
- 4. Enter the contact's name (first and last name) in the **Contact Name** field on the **Emergency Contact** dialog page.
- 5. Select a value in the Relationship field.
- 6. Select the Preferred checkbox (optional if another contact is the preferred contact)
- 7. Click the **Add Address** button.
- 8. Enter the contact's address information on the **Address** dialog page or select the **Same as mine** checkbox (and then click the **Done** button).
- 9. Click the **Done** button.
- 10. Click the Add Phone Number button on the Emergency Contact dialog page.
- 11. Select a value in the **Type** field on the **Phone Number d**ialog page or select the **Same as mine** check box (and then click the **Done** button).
- 12. Enter the contact's phone number in the **Number** field.
- 13. Enter the extension, if any, in the **Extension** field.
- 14. Click the **Done** button
- 15. Click the Save button.

Procedure



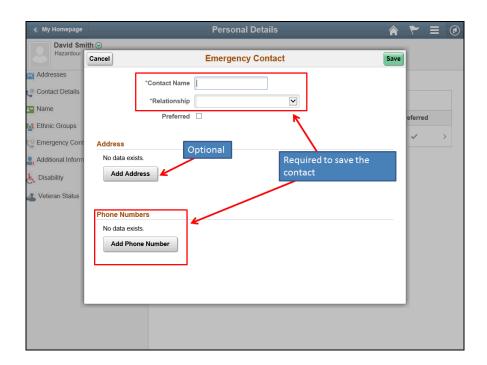




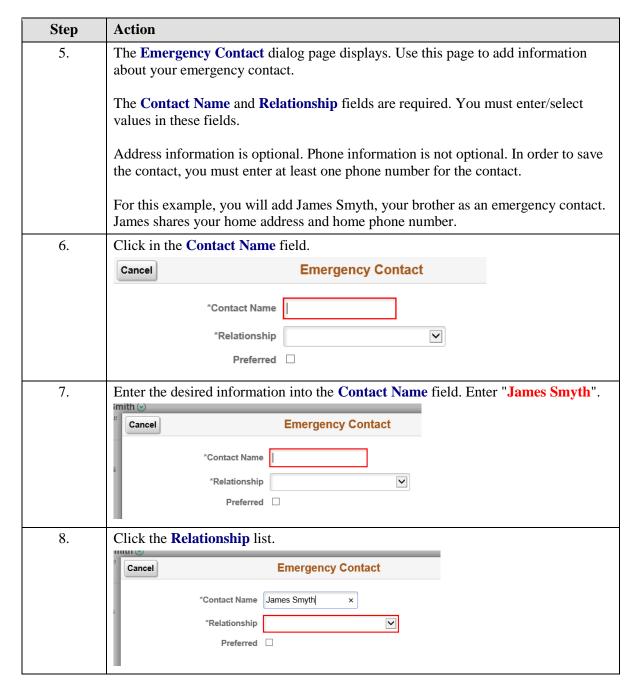




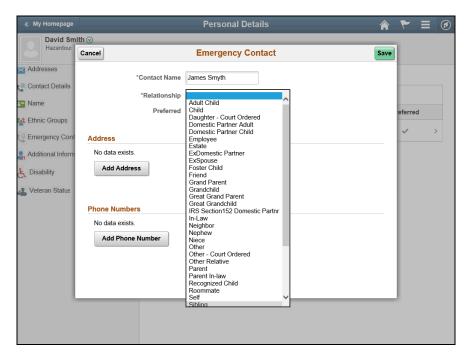
Step	Action		
3.	The Information panel displays your emergency contact information.		
	Currently you have listed a single emergency contact, Susan Jones.		
	For this example you will add an additional emergency contact, your brother James. James shares your home address and your home phone number.		
	Use the Plus (Add Emergency Contact button) to add another contact.		
4.	Click the Add Emergency Contact button.		
	Emergency Contacts		
	Contact Name Relationship		
	Susan Jones Friend		

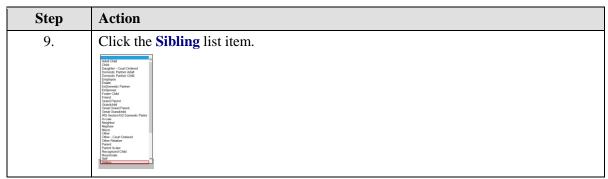




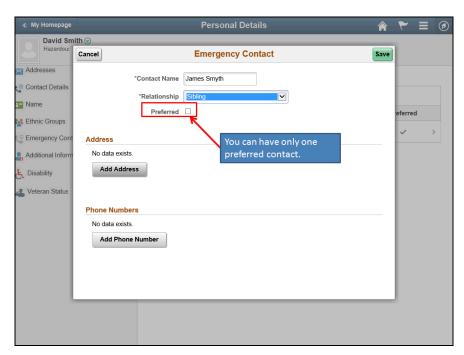




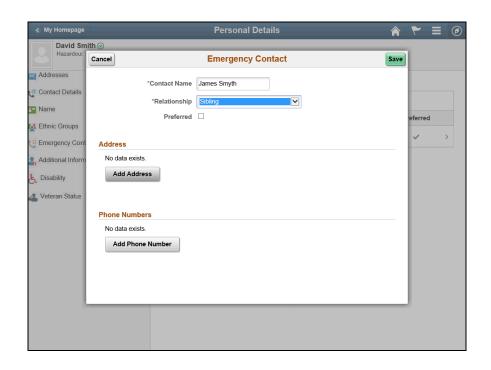




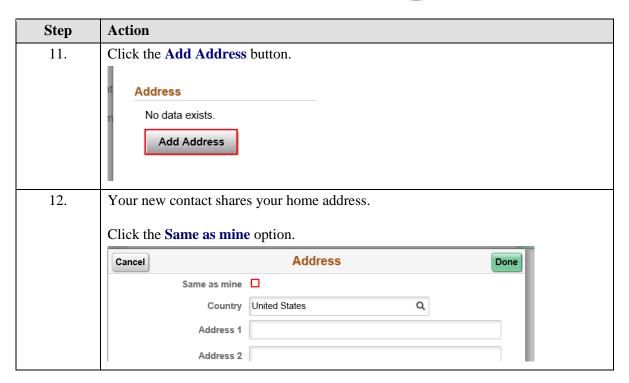


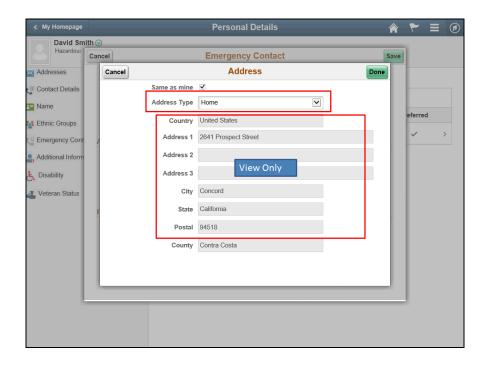


Step	Action
10.	Note, one contact must be marked as preferred contact. Currently, Susan Jones is your preferred contact.
	For this example, you will leave her as your preferred contact. You can have only one preferred contact.

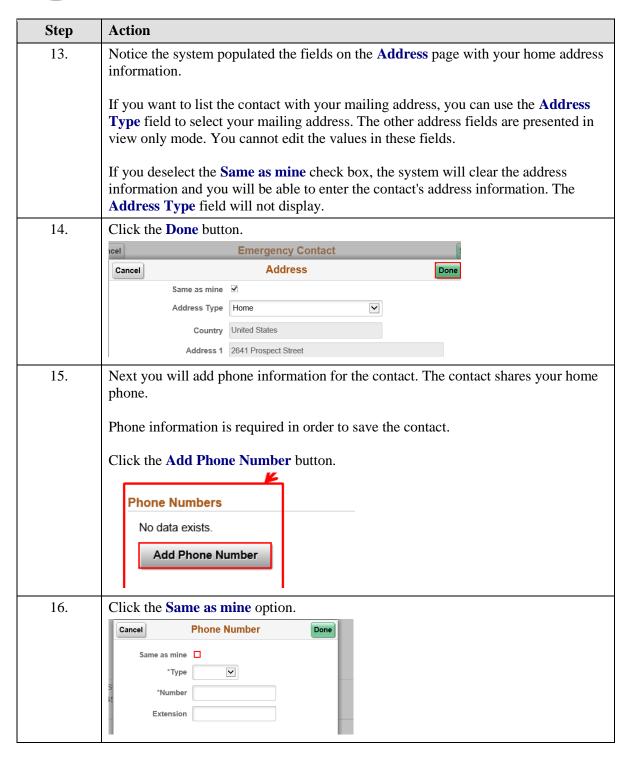




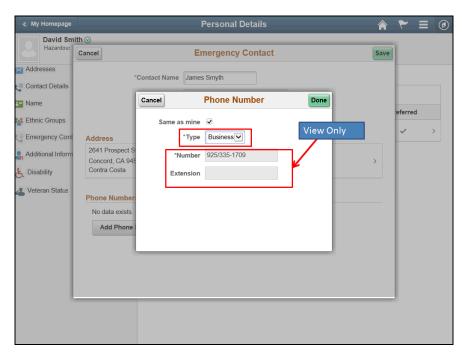


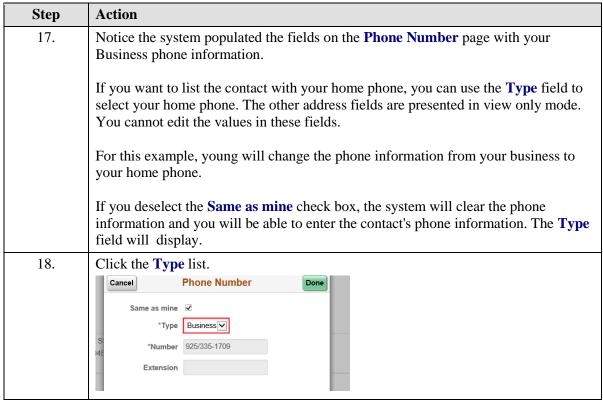




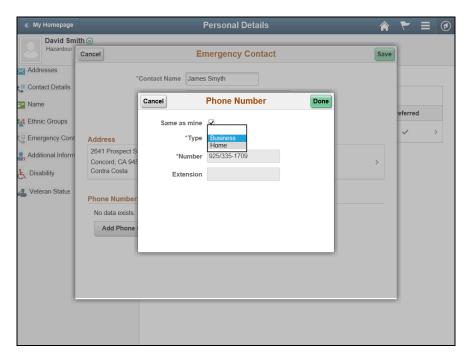


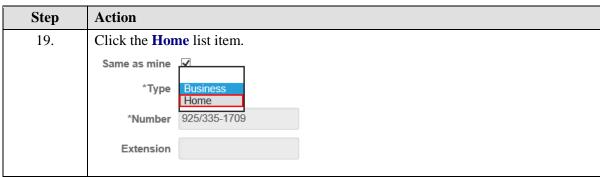




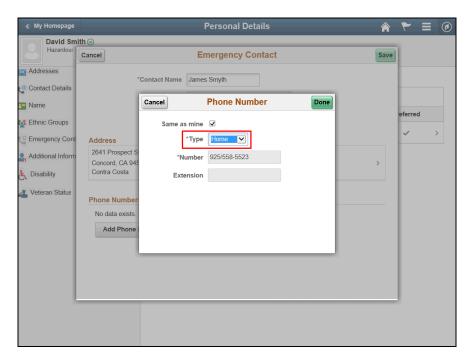




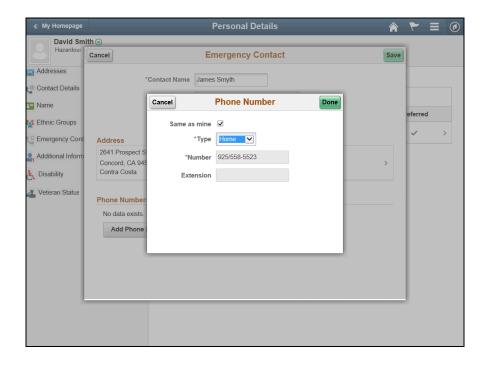






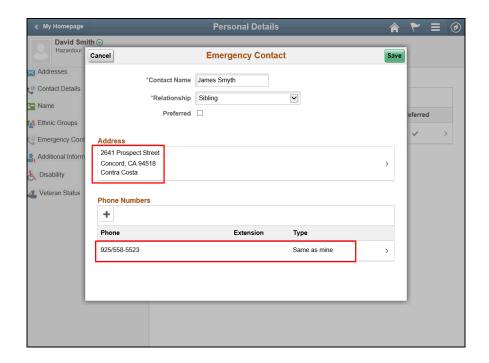


Sto	ер	Action
20	0.	Notice, the Phone Number page now displays your home phone number. You cannot edit this information on this page.



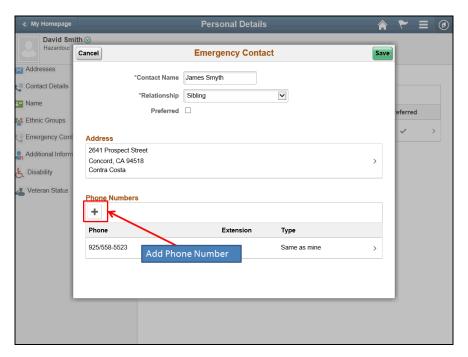






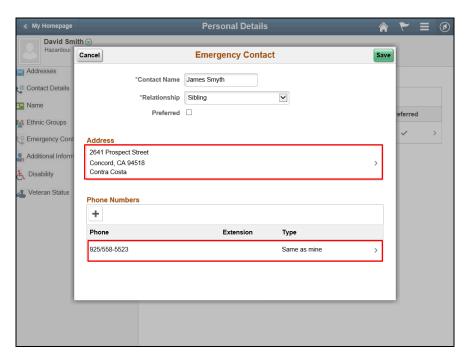
Step	Action	
22.	The Emergency Contact Page now displays the contact information you just	
	entered for the contact.	





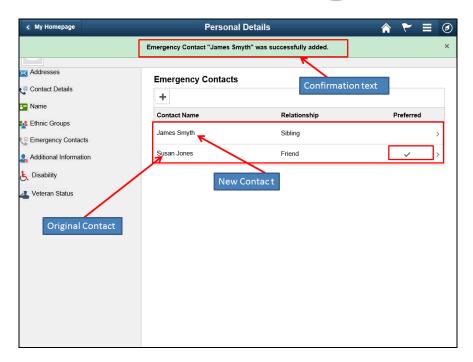
Step	Action
23.	You can user the Add a Phone Number button to add another phone number for the contact. You can store up to 5 phone numbers for a contact:
	Same as mine Home Business Mobile Pager 1
	For this example you will not add additional phone numbers.











Step	Action				
26.	The Information panel now displays a confirmation message indicating that you have successfully added an emergency contact.				
	You now have two contacts, James Smyth and Susan Jones. Susan remains your preferred contact.				
27.	Click the My Homepage button. ✓ My Homepage David Smith •				
	Hazardous Material Tech				
28.	End of Procedure.				

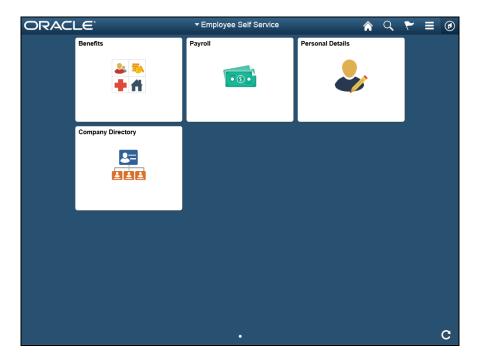
Deleting Emergency Contact Information

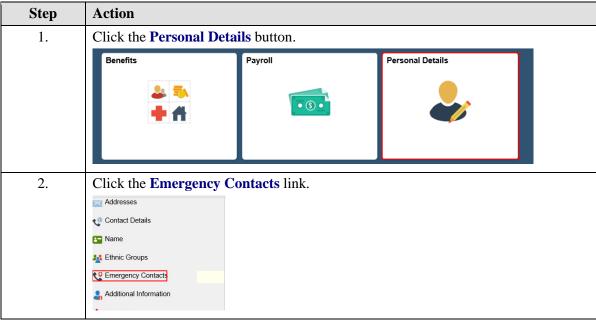
The basic steps to deleting an emergency contact are:

- 1. Click the **Personal Details** tile on the **Employee Self Service** home page.
- 2. Click the **Emergency Contacts** link in the **Actions** panel.
- 3. Click on the row on the **Emergency Contacts** grid for the contact you want to delete.
- 4. Click the **Delete** button on the **Emergency Contact** dialog page.
- 5. Click the **Yes** button on the **Delete Confirmation** page.

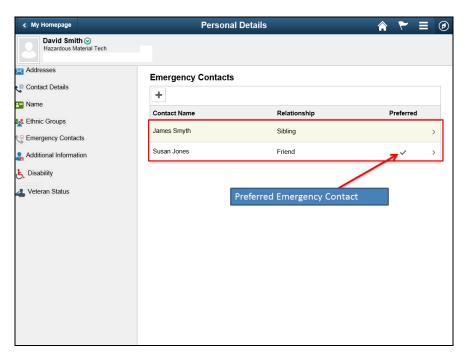


Procedure



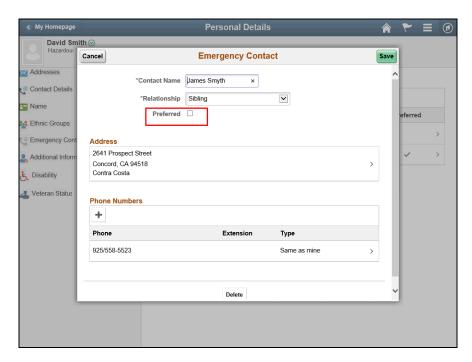


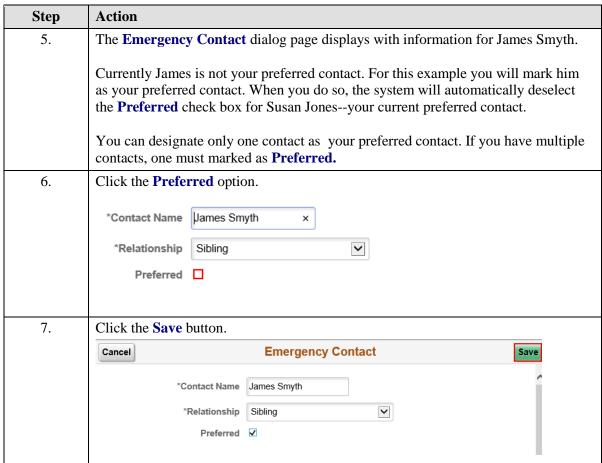




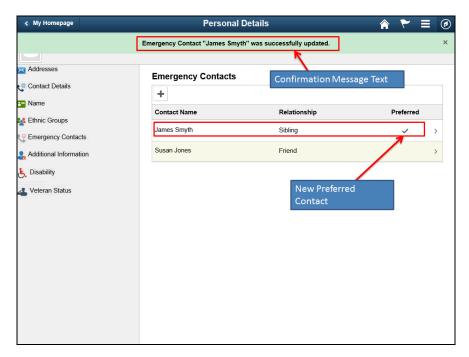
Step	Action				
3.	3. The Information panel displays your Emergency Conta			ntact information.	
	You currently have two contacts: James Smyth and Susan Jones. Susan is designated as your Preferred contact.				
		, you will delete Susa mes your Preferred	•	cy contact. Prior to doing so,	
4.	Click the row for	James Smyth in the	Emergency Co	ntacts grid.	
	Emergency Contacts				
	+				
	Contact Name	Relationship	Preferred		
	James Smyth	Sibling	>		
	Susan Jones	Friend	✓ >		





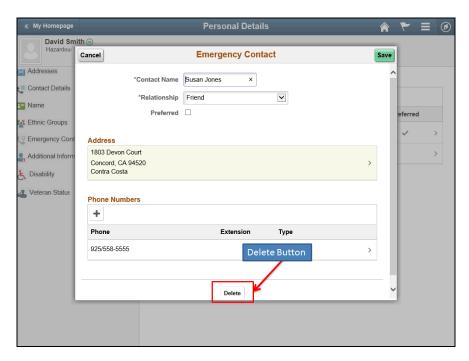


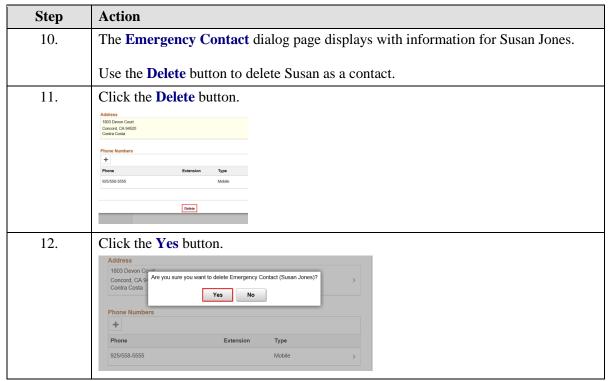




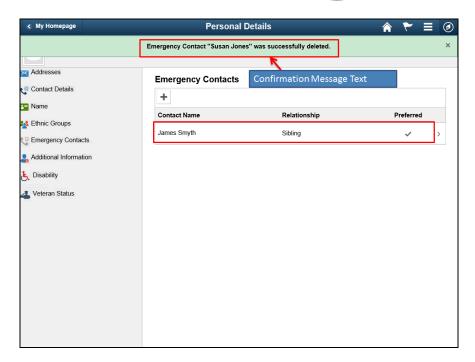
Step	Action			
8.	Notice the system displays a confirmation message indicating that you successfundated James Smyth. Also notice that James, not Susan Jones, is now your preferred contact.			
	Next, you will delete Susan Jones as an emergency contact.			
9.	Click the row for Susan Jones in the Emergency Contacts grid. Susan Jones Friend >			

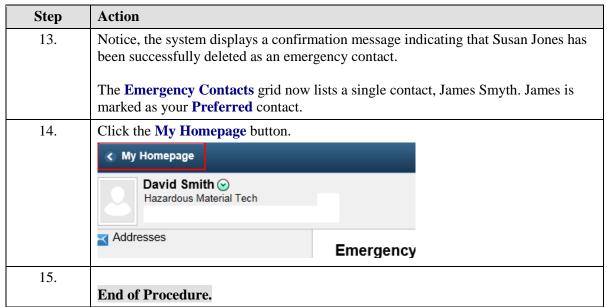












Maintaining Ethnicity Self-Identifications

Maintaining Ethnicity Self-Identifications

The Employee Self Service feature of PeopleSoft 9.2 allows you to review and update your ethnicity self-identification information that are stored in the system.

The steps involved in managing your ethnicity self-identification information are covered in a three topics in this lesson:

- Entering an Ethnicity Self-Identification
- Editing an Ethnicity Self-Identification

• Deleting an Ethnicity Self-Identification

This topic is available for play-back through the UPK player in

- See-It! Mode—allows you to attach a "video" demonstration of the topic
- Try-It! Mode—allows you to use your mouse and keyboard to complete transactions in a simulated environment

Both See-It! And Try-It! provide guided instructions and explanations of important features of PeopleSoft transactions. The full text of the instructions and explanations included in the UPK Payer are also available in two printed documents—a Training Guide and a Job Aid.

Here are some key points to keep in mind about maintaining your ethnicity self-identification information:

- Ethnicity information may not exist for you in the system
- Providing this information is voluntary
- You can self-identify with multiple ethnic groups
- One Ethnic self-identification must be marked as your primary self-identification
- The first group you enter is automatically marked as your primary self dedication
- You cannot self-identify as Hispanic/Latino and White or as Hispanic/Latino and Black

Entering an Ethnic Group Self-Identification

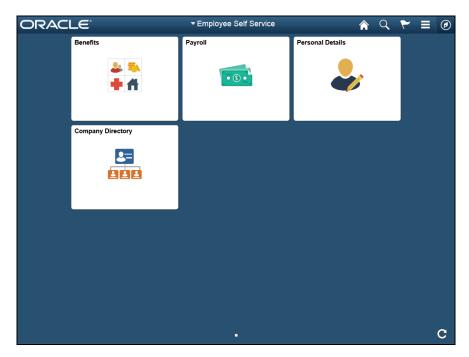
Entering an Ethnicity Self-Identification

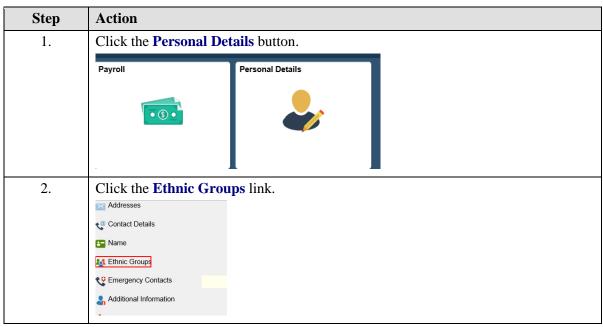
The basic steps to entering/adding an ethnicity self-identification are,

- 1. Navigate to the **Ethic Groups** page
- 2. Click the **Add an Ethic Group** button
- 3. Select a value from the **Description** field drop down list
- 4. Click the **Save** button on the **Ethic Groups** page
- 5. The **Save Confirmation** page displays
- 6. Click the **OK** button

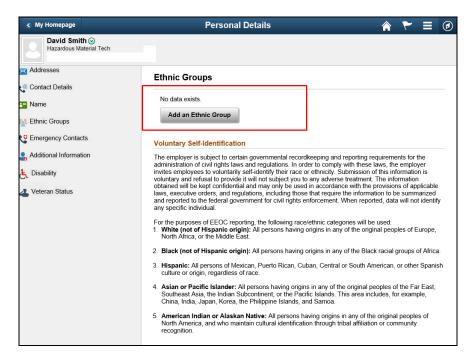
Procedure





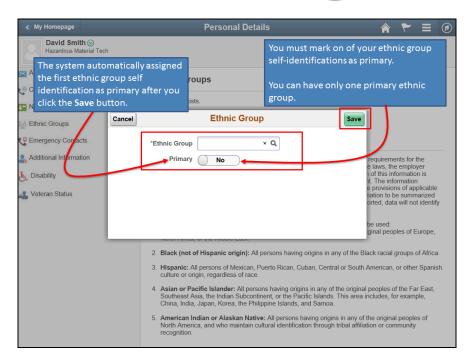


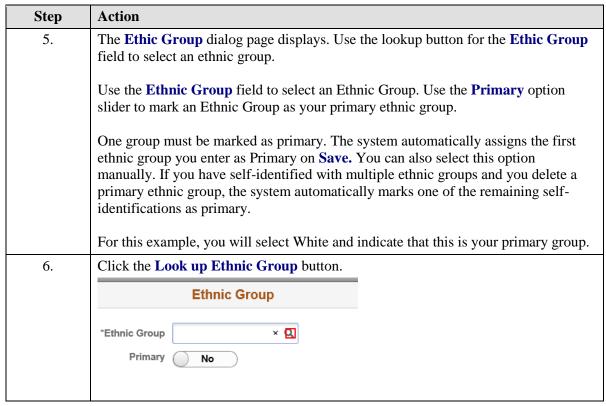




Step	Action
3.	The Ethnic Groups page displays. The Ethnic Groups grid displays the ethnic group that you self identified as.
	You can use this page to add an ethnic group self-identification.
	For this example, have no ethnic group self-identifications in the system.
	Use the Add an Ethnic Group button to add a self identification.
	For this example, you will attempt to add two self-identificationsone as White and the other as Hispanic/Latino.
4.	Click the Add an Ethnic Group button.
	Ethnic Groups No data exists. Add an Ethnic Group

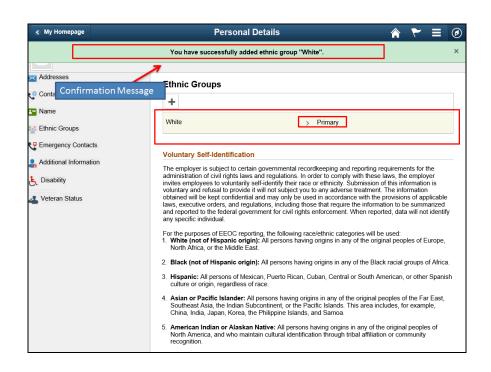




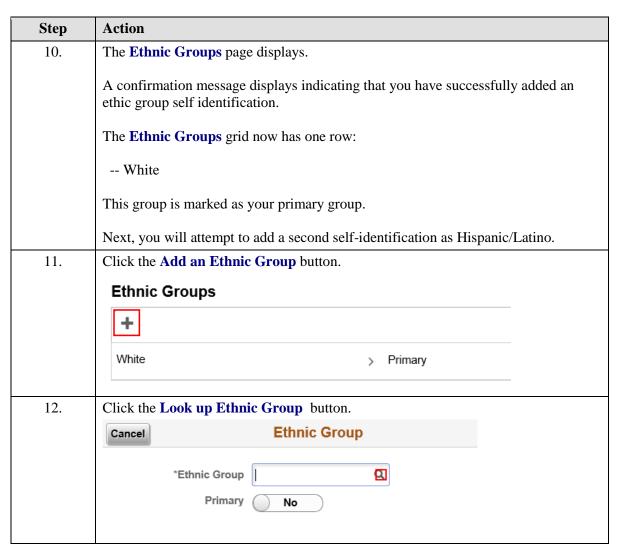




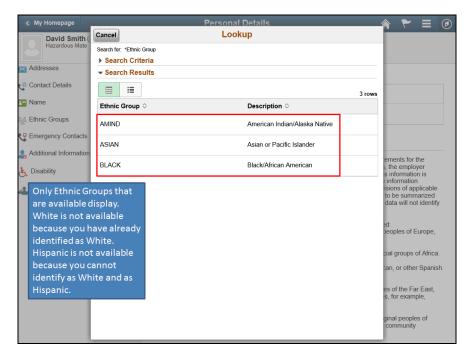
Step	Action
7.	Click the WHITE object.
	AMIND American Indian/Alaska Native
	ASIAN Asian or Pacific Islander
	BLACK Black/African American
	HISPA Hispanic/Latino
	WHITE White
8.	Click the Primary option. *Ethnic Group White
9.	Click the Save button.
	Ethnic Group Save
	*Ethnic Group White Q
	Primary Yes

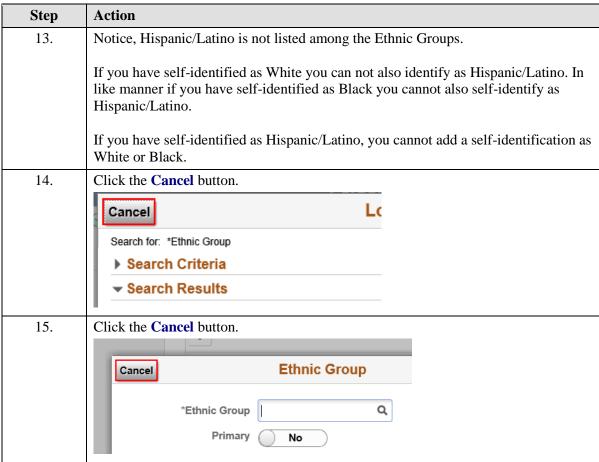














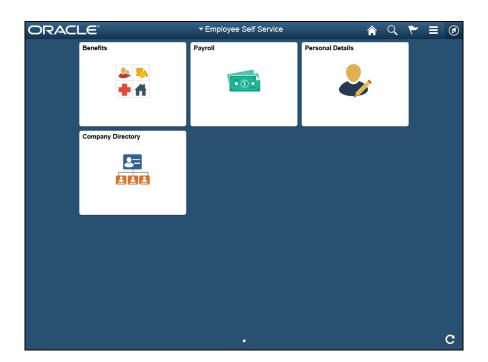
Step	Action
16.	Click the My Homepage button.
	∢ My Homepage
	David Smith Hazardous Material Tech
17.	
	End of Procedure.

Editing an Existing Ethnic Group Self-Identification

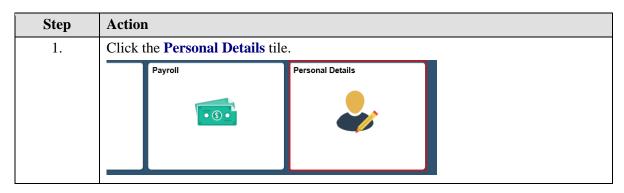
The basic steps to editing an existing ethnic group self-identification are:

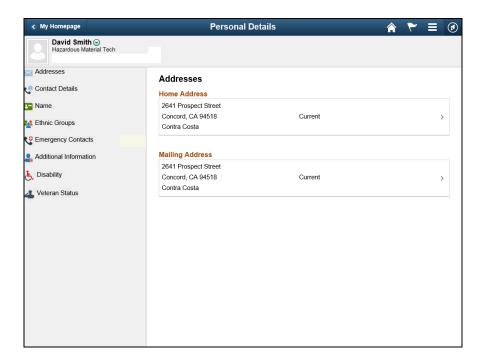
- 1. Click the **Personal Details** tile on the **Employee Self Service** home page.
- 2. Click **Ethnic Groups** link in the **Actions** panel.
- 3. Click the row to edit in the **Ethnic Groups** grid.
- 4. Click the Look Up button for the Ethnic Group field on the Ethnic Group dialog page.
- 5. Select the new ethnic group from the **Search Results**.
- 6. Click the **Save** button

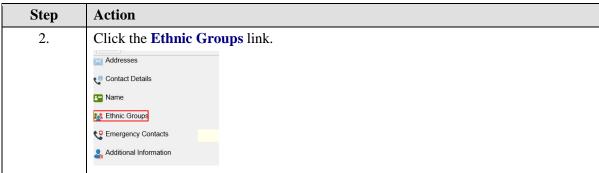
Procedure



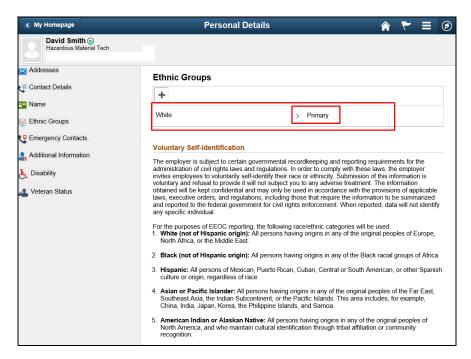


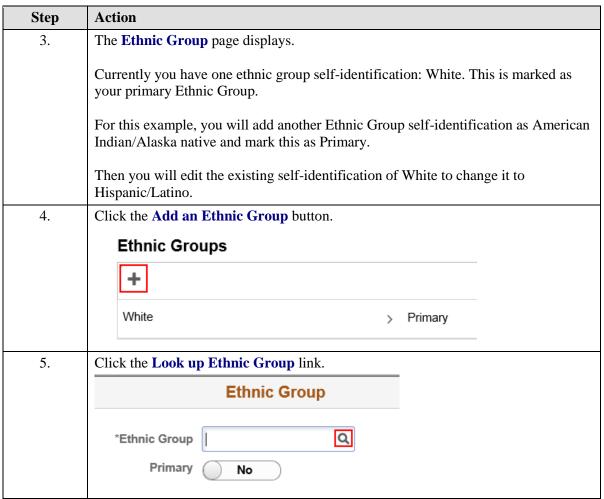




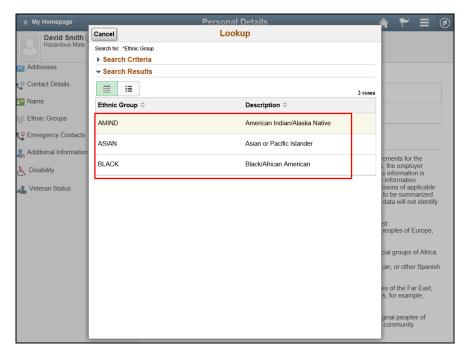






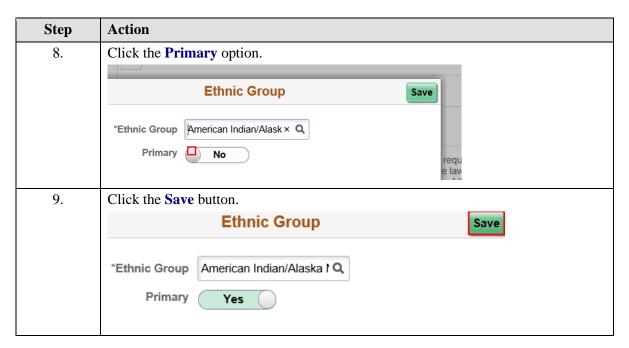


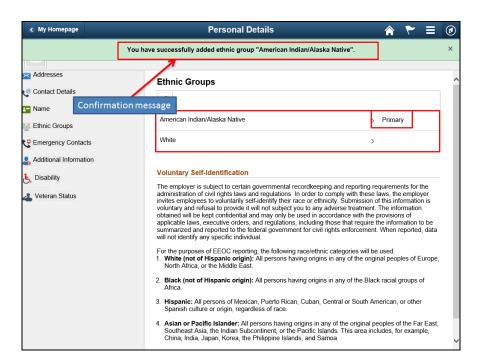




Step	Action	
6.	Notice White and Hispanic/Latino are not	
	You have already selected White. With Whas Hispanic/Latino.	inte selected, you cannot also self-identify
	The system does not permit self-identificat	ion as
	Hispanic/ Latino and White	
	Hispanic/Latino and Black	
7.	Click the AMIND object.	
	Ethnic Group \diamondsuit Description	1 ♦
	AMIND American In	dian/Alaska Native
	ASIAN Asian or Pa	cific Islander
	BLACK Black/Africa	n American



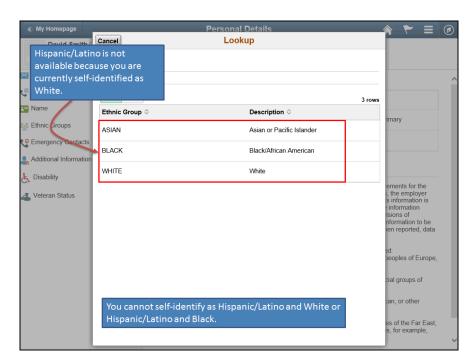




Step	Action
10.	The Ethnic Group page displays a confirmation message indicating that you have added an ethnic group.
	The Ethnic Group grid now displays two rowsone for American Indian/Alaska Native (marked as Primary) and one for White.
	Next you will edit the self-identification of White to change it to Hispanic/Latino.

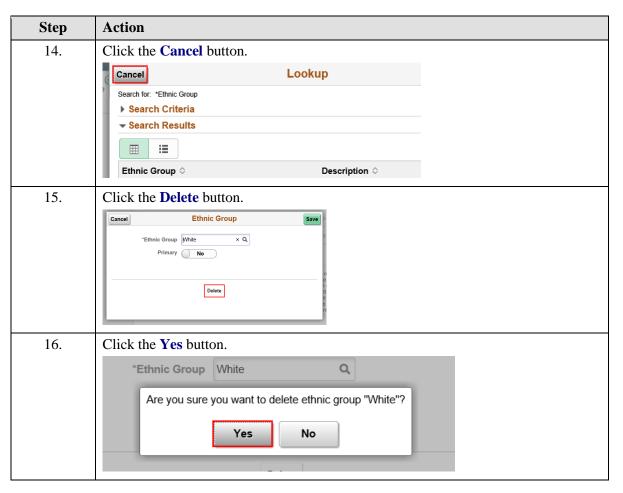


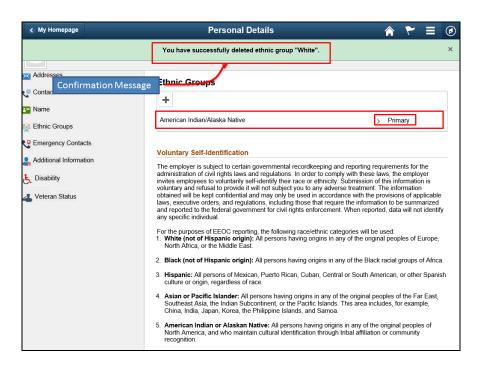




Step	Action
13.	Notice, Hispanic/Latino is not available as an option.
	You cannot select Hispanic/Latino, because you have self-identified as white.
	In order to change your self-identification from White to Hispanic/Latino, you must first delete the identification as White and then add a new identification as Hispanic/Latino.

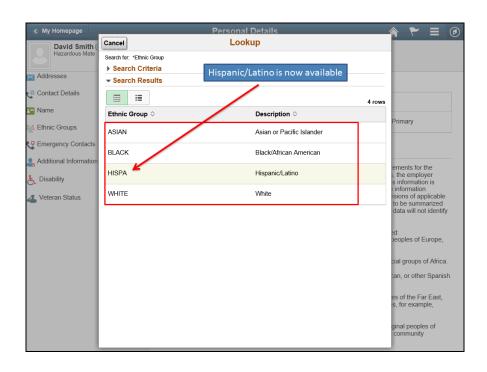






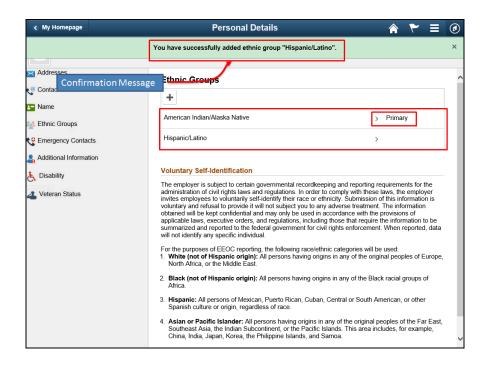


Step	Action
17.	Notice the Ethnic Groups page displays a confirmation message indicating that you have deleted your self-identification as White. Your self-identification as American Indian/Alaska native remains. It is still your primary ethnic group. Next you will add an additional self-identification as Hispanic/Latino. You will maintain American Indian/Alaska Native as your primary ethnic group.
18.	Click the Add an Ethnic Group button. Ethnic Groups + American Indian/Alaska Native
19.	Click the Look up Ethnic Group button. Ethnic Group *Ethnic Group Primary No





Step	Action
20.	Notice Hispanic/Latino is now available, because you do not have an existing self-identification as White or as Black. You can not self-identify as Hispanic/Latino and White or Hispanic/Latino and Black.
21.	Click the HISPA object. Ethnic Group \(\triangle \text{Description} \)
	Ethnic Group ♦ Description ♦ ASIAN Asian or Pacific Islander
	BLACK Black/African American
	HISPA Hispanic/Latino
	WHITE White
22.	Click the Save button.
	Ethnic Group Save
	*Ethnic Group Hispanic/Latino × Q
	Primary No



Step	Action
23.	Notice the Ethnic Groups page displays a confirmation message indicating that you have added an ethnic group of Hispanic/Latino.
	The Ethnic Group grid now lists two ethnic groups
	American Indian/Alaska Native (Primary) Hispanic/Latino
	These are listed in alphabetical order.
24.	Click the My Homepage button.
	∢ My Homepage
	David Smith Hazardous Material Tech
25.	
	End of Procedure.

Deleting an Ethnic Group Self-Identification

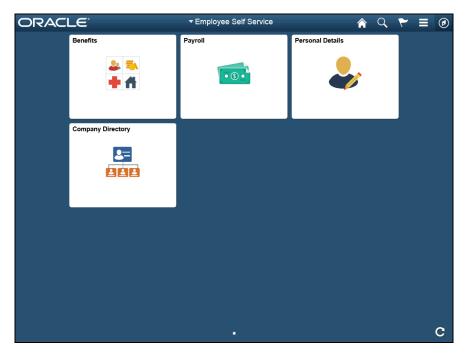
Deleting an Ethnicity Self-Identification

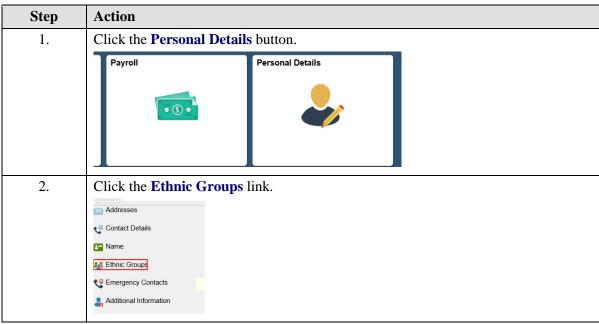
The basic steps to deleting an ethnicity self-identification are,

- 1. Navigate to the **Ethic Groups** page
- 2. Click the **Delete** button for the designation you want to delete
- 3. The **Delete Confirmation** page displays
- 4. Click the **OK** button
- 5. Click the **Save** button on the **Ethic Groups** page
- 6. The **Save Confirmation** page displays
- 7. Click the **Ok** button

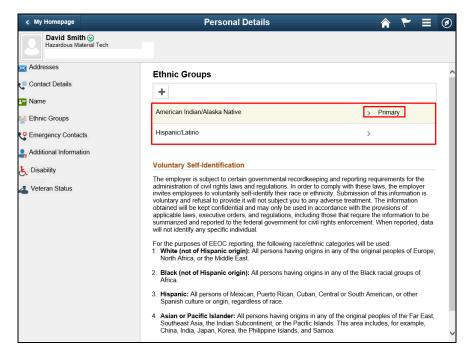
Procedure

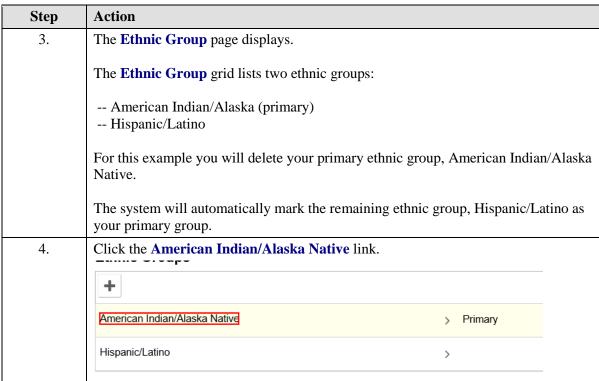




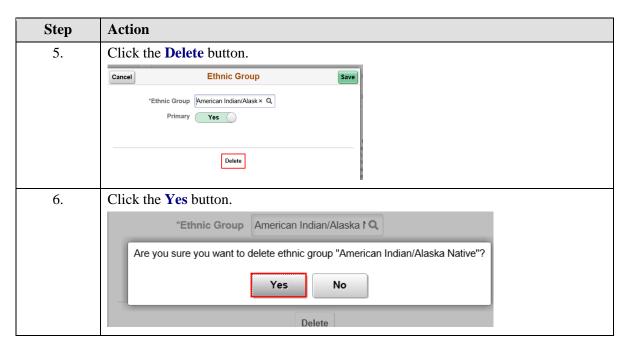


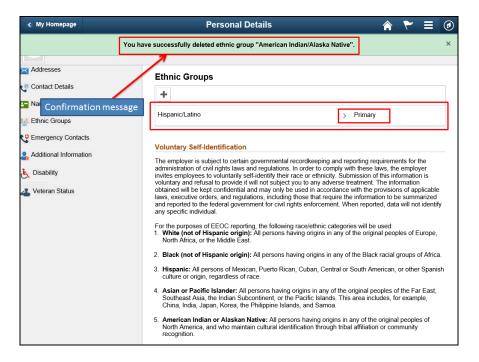












Step	Action
7.	The Ethnic Groups page displays a message indicating that you have deleted an ethnic group.
	The system has automatically assigned the Hispanic/Latino ethnic Group as your primary group.

Step	Action
8.	Click the My Homepage button.
	∢ My Homepage
	David Smith Hazardous Material Tech
9.	
	End of Procedure.

Maintaining Disability and Veteran Self-Identifications

Maintaining Disability and Veteran Self- Identifications

The Employee Self Service feature of PeopleSoft 9.2 allows you to review and update your Disability and Military self-identification information that are stored in the system.

The steps involved in managing your disability and military self-identification information are covered in a two topics in this lesson:

- Updating Disability Self- Identification
- Updating Veteran Self- Identification

This topic is available for play-back through the UPK player in

- See-It! Mode—allows you to attach a "video" demonstration of the topic
- Try-It! Mode—allows you to use your mouse and keyboard to complete transactions in a simulated environment

Both See-It! And Try-It! provide guided instructions and explanations of important features of PeopleSoft transactions. The full text of the instructions and explanations included in the UPK Payer are also available in two printed documents—a Training Guide and a Job Aid.

Here are some key points to keep in mind about maintaining your disability and military status self-identifications:

- Providing this information is voluntary
- You must update your disability self-identification every five years
- If you are disabled and/or a disabled veteran, you are entitled to reasonable accommodations
- Reasonable accommodations include: making a change to the application process or work
 procedures, providing documents in an alternate format, using a sign language interpreter,
 or using specialized equipment.

Updating Disability Self-Identification

Updating Disability Self-Identification

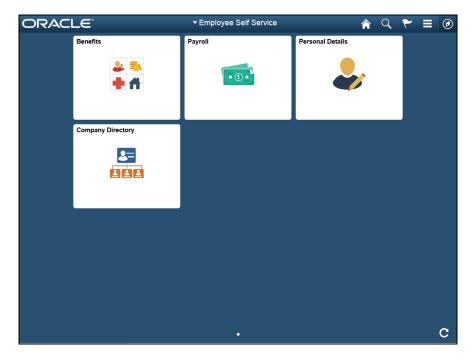
The basic steps to your disability self-identification are,

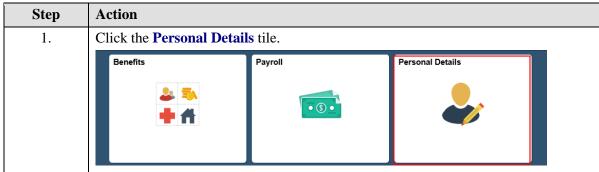


- 1. Navigate to the Voluntary Self- Identification of Disability page
- 2. Review information on the page
- 3. Select one of the options to indicate if you have a disability, do not have a disability, or chose not to provide this information
- 4. Click the **Submit** button
- 5. Click the **OK** button on the **Submit Confirmation** page

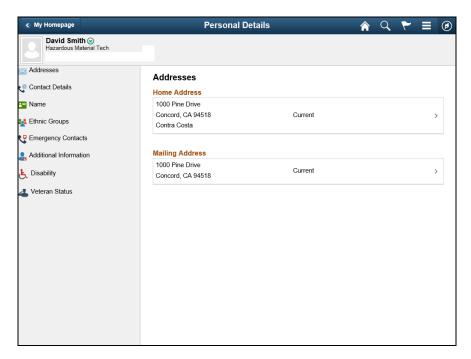
Procedure

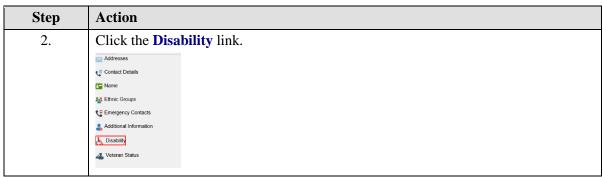
Navigation: Employee Self Service Home page > Personal Details tile



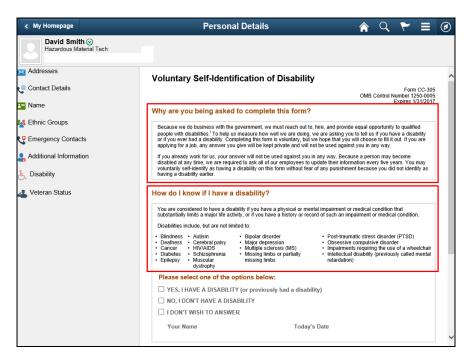








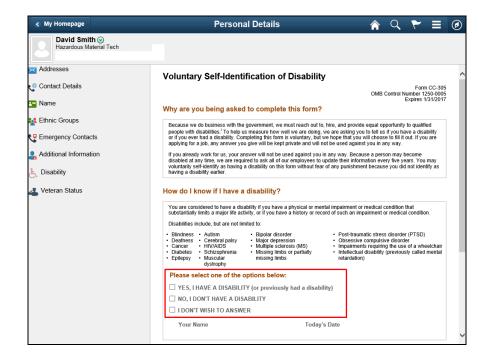




Step Action

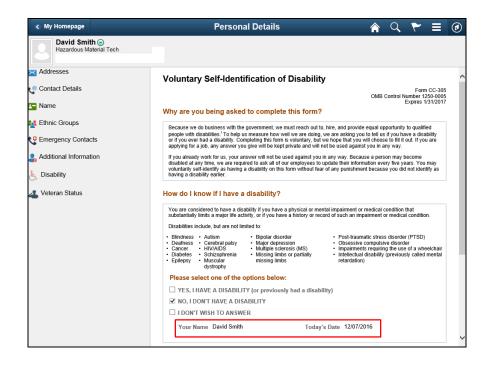
3. The Voluntary Self- Identification of Disability page displays.

The text in the Why are you being asked to complete this form? and the How do I know if I have a disability? sections.



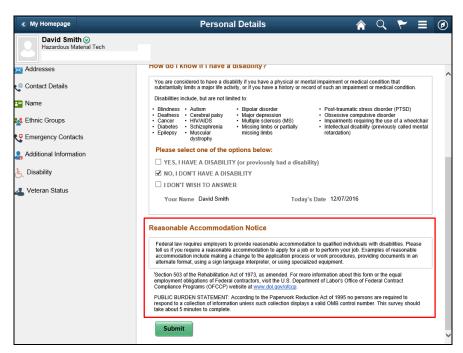


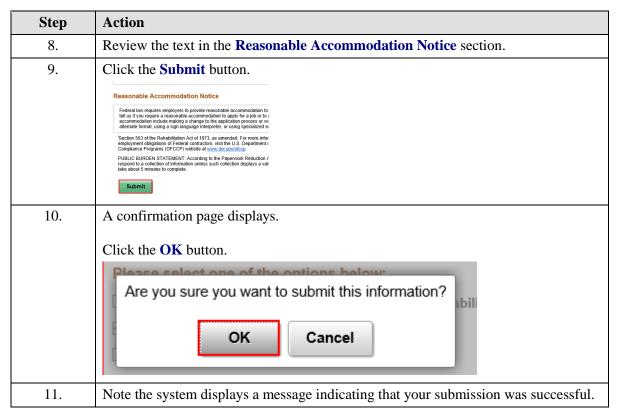
Step	Action	
4.	Select one of the options in the Please select one of the options below section.	
5.	Click the No, I DON''T HAVEA DISABILITY option.	
	dystrophy	
	Please select one of the options below:	
	☐ YES, I HAVE A DISABILITY (or previously had a disability)	
	□ NO, I DON'T HAVE A DISABILITY	
	☐ I DON'T WISH TO ANSWER	



Step	Action
6.	Notice the system populates the Your Name field with you name as it is stored in the system and the Today's Date field with the current date.
	You cannot edit the values in these fields.
7.	Click the scrollbar.







Step	Action
12.	Click the My Homepage button.
	∢ My Homepage
	David Smith Hazardous Material Tech
13.	
	End of Procedure.

Updating Veteran Self-Identification

Updating Veteran Self- Identification

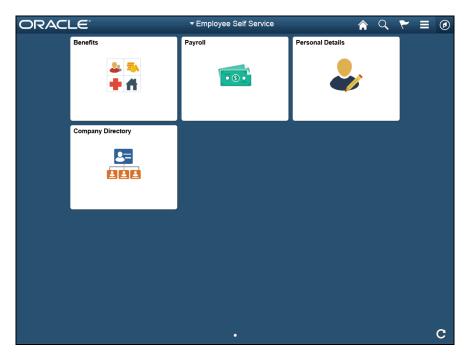
The basic steps to your Veteran self-identification are,

- 1. Navigate to the **Veteran** page
- 2. Review information on the page
- 3. Select one of the options to indicate your veteran status
 - 1. A Protected Veteran (and class)
 - 2. A Protected Veteran but choose not to identify the class
 - 3. A veteran, but not a protected Veteran
 - 4. Not a veteran
- 4. If you indicated that you are a veteran, enter your discharge date in the **Military Discharge Date** field
- 5. Click the **Submit** button
- 6. Click the **OK** button on the **Submit Confirmation** page

Procedure

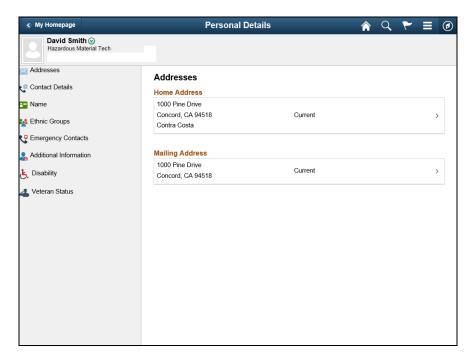
Navigation: Employee Self Service Home page > Personal Details tile

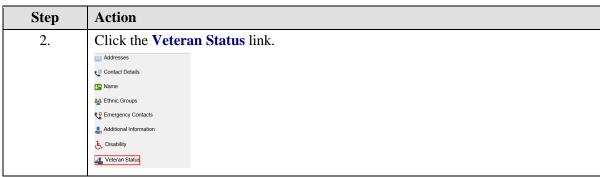




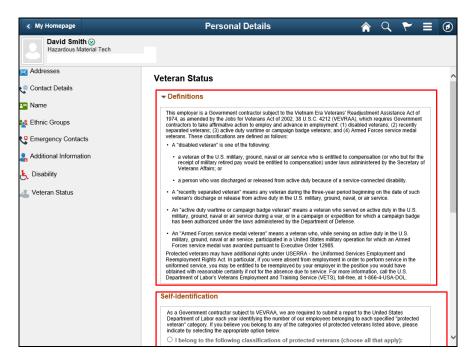




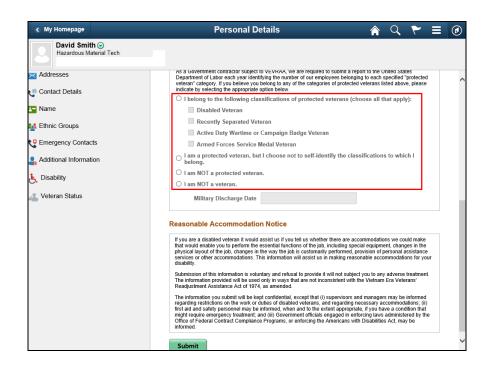






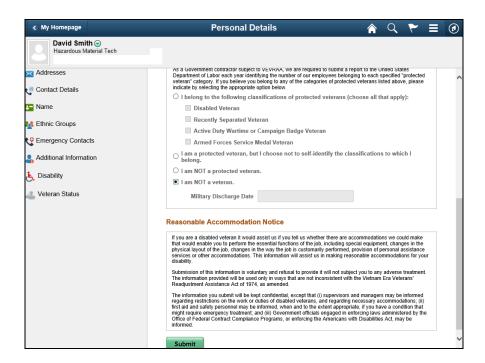


Step	Action
3.	The Veteran Status page displays.
	Review the text in the Definitions and Self- Identification sections.
4.	Click the scrollbar.



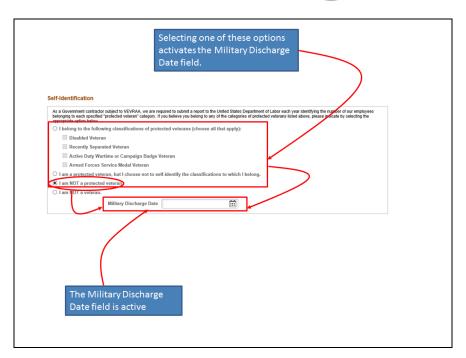


Step	Action
5.	Select one of the options in the Self- Identification section.
6.	Click the I am NOT a veteran. option.
	☐ I am NOT a veteran.

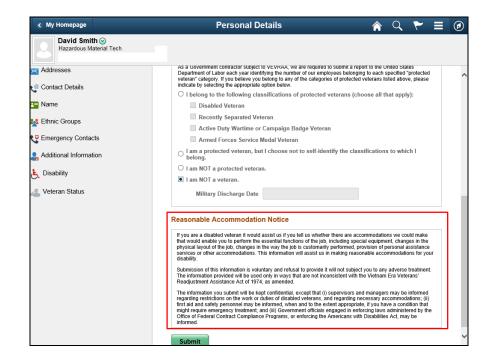


Step	Action
7.	If you select the I am NOT a veteran . option, the Military Discharge Date field becomes inactive.





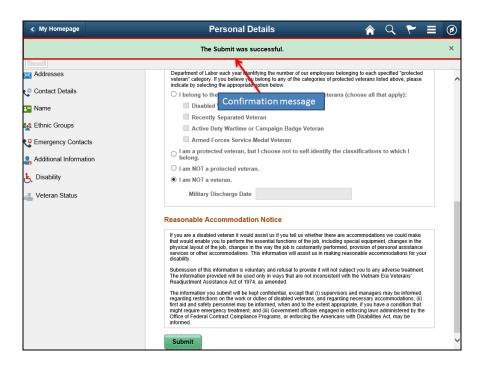
Step	Action
8.	If you select one of the other options, you must enter or select a value in the Military Discharge Date field. The filed will be active.



Step	Action
9.	Review the text in the Reasonable Accommodation Notice section.



Step	Action
10.	Click the Submit button.
	Submit
11.	Click the OK button.
	ОК



Step	Action
12.	The system displays a submit confirmation message indicating that your submission was successful.
13.	Click the My Homepage button.
	My Homepage
14.	
	End of Procedure.