PeopleSoft HR/Pay 9.1
Employee Self Service (ESS)

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Human Resources

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Agenda

- Employee Responsibilities
- What Can an Employee Do in ESS
- Who Uses What (T/L & AM)
- What If …
- Conversion 7.6 to 9.1
- Key Points of Knowledge Center (UPK)
- Time Frame and Resources
- Questions
- Terminology Appendix
Employee Responsibilities

- Sign up for KU Online ID if you do not have one ([https://myidentity.ku.edu/setup/login](https://myidentity.ku.edu/setup/login))

- Time and Labor
  - Report accurate work hours
  - Report hours worked timely

- Absence Management
  - Process request accurately and timely

- Proximity Card Users
  - Do not write on or punch holes (will inactivate)
  - Turn in upon resignation/retirement
Employee Responsibilities

• Update Personal Data when change occurs
  • Home Address and Phone
  • Bank Account(s) – Payroll

• Monitor Worklist for Absence Responses

• Timesheet-Regular Hourly Employees
  • Not eligible for Premium Pay (no call back, shift or standby)
  • Enter actual hours worked
  • Select the correct Time Reporting Code (TRC)
  • Enter hours worked weekly (minimum)
Employee Responsibilities

- Time Collection Device (TCD) or Web Clock – Regular Premium Pay and Temporary Hourly Employees
  - Select the correct Punch Type
    - In – start the work day
    - Temp Out – anytime you leave for unpaid time during the work day
    - Out – when have completed your work day

- Select the correct Time Reporting Code (TRC)
  - Listing of codes will be provided
    - Regular
    - Call back etc.

- For those eligible - Shift will be added by the Time and Labor Rules
What Can an Employee Do in ESS (ESS– Employee Self-Service)

- Change Personal Information (*Self Service>Personal Information*)
  - Home and Mailing Addresses, Phone Numbers, Emergency Contacts, Email Addresses, Martial Status, Ethnic Groups, Submit Federal I-9 Form

- Payroll and Compensation (*Self Service>Payroll and Compensation*)
  - View Paycheck, Direct Deposit, Compensation History, W-4 Tax Information

- Benefits (*Self Service>Benefits>Benefits Information*)
  - Benefits Summary
What Can an Employee Do in ESS

(ESS – Employee Self-Service)

• Learning and Development (*Self Service>*Learning and Development)
  • Training Summary (As Recorded in HR)

• Recruiting Activities (*Self-Service>*Recruiting Activities>*Careers)
  • Search and Apply for Vacancies
  • Upload Application Information

• KU Review Rating (*Self Service>*KU Review Rating)
  • Enter Employee Record Number – most will be 0, if multiple jobs may enter 1, 2, etc.
What Can an Employee Do in ESS (ESS– Employee Self-Service)

- Review Transactions *(Self Service>Review Transactions)*
  - Workflow Transaction history

- Manage Delegation *(Self Service>Manage Delegations)*
  - Delegate approval authority – supervisor use

- Time Reporting *(Self Service>Time Reporting)*
  - Report Time (Based on employee type)
    - Web Clock, Timesheet, or Absence Request
  - View Time History, Absence Request History, Absence Balances
<table>
<thead>
<tr>
<th>Type of Employee</th>
<th>Type</th>
<th>Time &amp; Labor</th>
<th>Absence Mgmt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular Staff (USS, UPS etc.)</td>
<td>Hourly</td>
<td>Timesheet</td>
<td>Yes</td>
</tr>
<tr>
<td>Regular Staff (USS, UPS) Premium Pay</td>
<td>Hourly</td>
<td>WebClock/TCD</td>
<td>Yes</td>
</tr>
<tr>
<td>Temporary (USS, UPS, Students etc.)</td>
<td>Hourly</td>
<td>WebClock/TCD</td>
<td>No</td>
</tr>
<tr>
<td>Regular Staff (USS, UPS etc.)</td>
<td>Salaried</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Regular Faculty</td>
<td>Salaried</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Temporary Faculty</td>
<td>Salaried</td>
<td>No</td>
<td>Yes (LWOP)</td>
</tr>
<tr>
<td>Temporary Students (GA, GTA, GRA)</td>
<td>Salaried</td>
<td>No</td>
<td>Yes (LWOP)</td>
</tr>
</tbody>
</table>

- Hourly employees report worked hours and leave taken.
- Salaried employees report leave taken or leave without pay.
- USS - University Support Staff
- UPS - Unclassified Professional Staff
- GA – Graduate Assistant
- GTA – Graduate Teaching Assistant
- GRA - Graduate Research Assistant
What if …

• Hourly Employee
  • TCD (Time Collection Device) or Web Clock User
    • I select an incorrect Time Reporting Code (TRC) or an incorrect Punch Type? – Contact Supervisor or Time Reviewer.
    • I forget to Clock in or Out (Missed Punch)? – Contact Supervisor or Time Reviewer.
    • I forget my Proximity Card (Badge)? – Use the Web Clock or Contact Supervisor.

• Timesheet User
  • I do not enter my hours? – there are no default hours – you won’t receive a paycheck.
What if …

• Leave Eligible Employees
  • I am home sick?– contact Supervisor to report absence and then upon your return submit Sick Request through Absence Management.
  • I have submitted an Absence Request and my plans change?
    • If the request has not been approved, ask you Supervisor to return the workflow (Deny).
    • If the request has been approved, HR will need to make an adjustment.
  • I need to submit an Absence Request after the fact is this okay?
    • Yes, but it should be entered timely for accurate pay and recording.
Conversion 7.6 to 9.1

- Last payroll period in current system (7.6)
  - 9/16 to 9/29 paid 10/12
- First payroll period in new system (9.1)
  - 9/30 to 10/13 paid 10/26
    - Split time tracking for hourly. (we need to finish calc in 7.6)
  - Temporary and Premium Pay employees must write down actual clock times in and out beginning 9/30 and until notified the new system is available.
    - Time Reviewers (or Supervisors) will need to enter this data into the 9.1 “punch” timesheet.
- Timesheet users should make note of total hours worked per day and then enter in 9.1.
Key Points of Knowledge Center (UPK)

You learn how to:

✓ Save Favorites
✓ Find your Worklist
✓ Ask the Expert

• UPK will always be available
• New employees are currently enrolled for access on a weekly basis.
• ROC (Recruiting and Onboarding Center) will notify hires about the training.
Time Frame and Resources

Go Live
• 9.1 HR/Pay Projected Availability – 10/8/2012

Where to get Information:
• Project Website: www.hrpay.ku.edu
  • Time Device – Building List
  • Project Team
  • Training Schedule and Methods
• Drop In 10/8/2012-10/19/2012 (M-F)
  • 7:00 am to 6:00 pm – Rooms 31 and 103B Carruth
Time Frame and Resources

Contact Information:

- Help Desk 864-0600 (Functional)
- Help Desk 864-8080 (Technical)
- Project Management Team email: apex-pmo@ku.edu
- Project Email: hrpay@ku.edu
Questions

Thank you for attending.
# Terminology Appendix

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AM</td>
<td>Absence Management – A module in PeopleSoft where leave requests are entered and are approved. Leave taken, entitlements, and balances are stored in AM.</td>
</tr>
<tr>
<td>Absence</td>
<td>Leave request (vacation, sick, compensatory time usage, etc.)</td>
</tr>
<tr>
<td>Candidate Gateway</td>
<td>Applicant entrance to apply for and manage job searches within the PeopleSoft system.</td>
</tr>
<tr>
<td>Combination Code</td>
<td>A value assigned to a string of chartfields used for funding payroll costs. (Prior name was Account Code)</td>
</tr>
<tr>
<td>Entitlement</td>
<td>Accrual</td>
</tr>
<tr>
<td>ESS</td>
<td>Employee Self Service</td>
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<td>MSS</td>
<td>Manager Self Service</td>
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## Terminology Appendix

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<td>Takes</td>
<td>Absence usage</td>
</tr>
<tr>
<td>TAM</td>
<td>Talent Acquisition Management – A module in PeopleSoft for Recruitment also know as Recruiting Solutions.</td>
</tr>
<tr>
<td>TCD</td>
<td>Time Collection Device – a physical device outside PeopleSoft used to clock-in/out via proximity cards or biometrics.</td>
</tr>
<tr>
<td>Time Collection Method</td>
<td>Ways to report hours worked or absence via Time Collection Device, timesheet, or web clock.</td>
</tr>
<tr>
<td>Time Reviewer</td>
<td>Departmental, Area or Business Service Center Staff Member with job responsibilities to assist with the completion of worked time and absence approvals.</td>
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<td>T&amp;L or T/L</td>
<td>Time and Labor – A module in PeopleSoft where hours worked are loaded by a time collection method, processed and stored. Absences are also loaded and stored.</td>
</tr>
<tr>
<td>TRC</td>
<td>Time Reporting Code – a code used to determine the type of hours worked or leave taken (e.g., REG, CME, SCK, etc.)</td>
</tr>
<tr>
<td>UPK</td>
<td>User Productivity Kit – Additional Oracle Product for end user training and online reference/tutorial and can do online testing.</td>
</tr>
<tr>
<td>Workflow</td>
<td>System process that routes approval or notifications via electronic system determined by fields or roles and may use email to notify.</td>
</tr>
<tr>
<td>Worklist</td>
<td>Page in the PeopleSoft system of items awaiting action – a To Do list or items sent via workflow. Action items such as approve timesheet or absence are located here.</td>
</tr>
</tbody>
</table>