PeopleSoft HCM Self-Service Desk Reference Guide

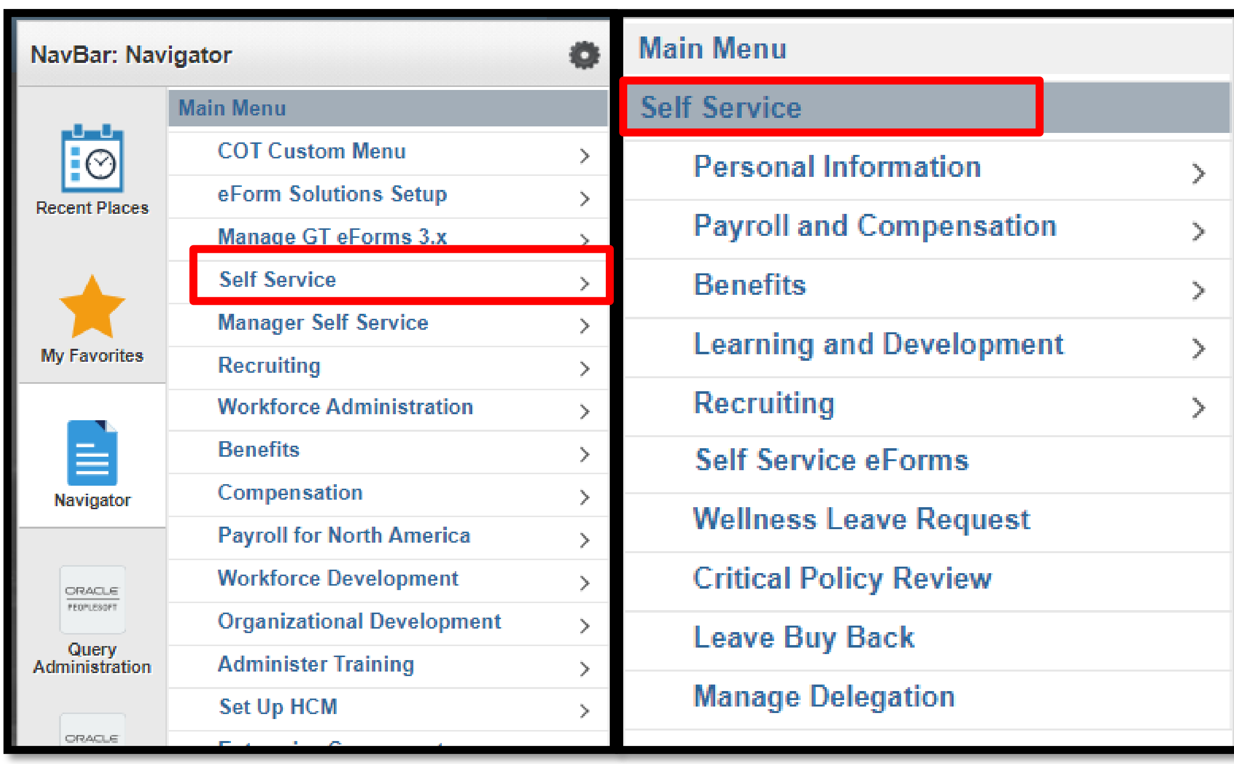
PeopleSoft HCM (Human Capital Management) Self Service is an online platform that allows employees and managers to manage and access various HR-related information and services. This includes updating personal details, managing payroll and benefits, enrolling in training programs, reviewing job profiles, and more. It provides a user-friendly interface that streamlines HR tasks, making them more accessible and efficient for both employees and HR teams.

Logging into PeopleSoft HCM

To access PeopleSoft HCM, click the following link: PeopleSoft HCM Login.
Use the login credentials provided to you by T&I or your department representative. If you have any issues logging in please contact the Service Desk at extension 8855 or submit a Service Desk Ticket at https://supportdesk.talgov.com/

Once logged in, navigate to the **NavBar** by selecting the compass icon in the upper-right corner of the screen.

A drop-down menu will appear with a list of options. Select **Self Service** to access various HR-related features.



The following is an overview of each sub-menu item/module currently available in Self Service:

- **Personal Information:** Allows employees to view and update personal details like contact information and emergency contacts.
  - **Addresses:** Update or view current and permanent address details.
  - **Contact Details:** Maintain phone numbers and email addresses for communication purposes.
  - **Social Media:** Optionally record social media handles for networking or organizational use.
  - **Marital Status:** Update marital status for tax or benefits purposes. Please contact hrbenefits@talgov.com prior to making any changes.
  - **Name:** Request changes to your legal name if necessary. Please contact hrbenefits@talgov.com prior to making any changes.
  - **Ethnic Group:** Record or update demographic information as required.
  - **Emergency Contacts:** Add or update individuals to be contacted in case of emergencies.
  - **Additional Information:** View-only details such as:
    - Original Start Date: Initial employment date.
    - Last Start Date: Most recent start date in the organization.
    - Education Level: Highest education level on file.

- **Payroll and Compensation:** Provides access to paychecks, tax forms, and tools to manage direct deposit information.
  - ***United Way Contribution:*** Set up or manage payroll deductions for United Way charitable contributions.
  - ***Coffee/Tea Deduction:*** Opt-in for deductions related to workplace coffee or tea programs.
  - ***Fire Dues Deduction:*** Manage payroll contributions for local fire union dues, if applicable.
  - ***Pay:*** View current and past paychecks and details about gross and net pay.
  - ***View Prior YTD:*** Review year-to-date payroll summaries for previous years.
  - ***Direct Deposit:*** Update or add accounts for paycheck deposits.
  - ***My Total Rewards:*** Access a detailed summary of compensation, including salary and benefits. (Not in use)
  - ***Compensation History:*** View historical changes to pay rates or salary adjustments.
  - ***W-4 Tax Information:*** Update federal tax withholding preferences.
  - ***W-2:*** Access and download annual W-2 tax forms.
  - ***W-2c Consent:*** Provide consent to receive corrected W-2 forms electronically.
  - ***COT_VIEW_W2 (2017 & Older):*** Access W-2 forms issued in 2017 and earlier for historical reference.

- **Benefits:** Enables employees to review, update, and enroll in health, retirement, and other benefit plans.
  - ***Benefits Information***
    - <u>Healthcare Summary:</u> View current healthcare plans, coverage levels, and enrolled dependents.
    - <u>Savings Summary:</u> Review details of retirement or savings plans, including account balances.
    - <u>Savings Contribution Summary:</u> Monitor contributions to savings plans such as 401(k) or other retirement accounts.
    - <u>Flexible Spending Accounts:</u> Manage contributions and view balances for healthcare or dependent care spending accounts.
  - ***Dependents and Beneficiaries***
    - <u>Dependent/Beneficiary Coverage:</u> Review the coverage provided to dependents and designated beneficiaries.
    - <u>Health Care Dependent Summary:</u> View dependents enrolled in healthcare plans and their coverage details.
    - <u>Insurance Beneficiary Summary:</u> Check assigned beneficiaries for life insurance and other applicable policies.
  - ***Retirement Planning Info:*** Access information to assist with retirement savings and planning.
  - ***COT Pension Statement:*** View detailed pension plan statements, including contributions and estimated payouts.
  - ***New Hire Benefits Enrollment:*** Enroll in benefits during your initial eligibility period as a new hire.
  - ***Pay and Benefit Summary:*** Review a comprehensive summary of salary, benefits, and total compensation.
  - ***Benefits Summary:*** View current benefit elections and coverage details.
  - ***Dependent/Beneficiary Info:*** Manage dependent details and designate beneficiaries for applicable plans.
  - ***Insurance Summary:*** Review summaries of insurance coverage, including health, life, and disability plans.

- **Learning and Development:** Supports enrollment in training programs and tracking of completed learning activities.
  - ***Faculty Event Tracking:*** Track participation in faculty events. Not available to all users
  - ***Talent Profile:*** Maintain and update a comprehensive profile of skills, experiences, and qualifications.
  - ***New Employee Orientation Checklist:*** Access and complete onboarding tasks as part of the new hire process.

- ***My Historical Profile:*** Review past roles, achievements, and qualifications.
- ***My Job Profiles:*** View job profiles associated with your current or past roles.
- ***My Interest List:*** Save profiles of roles or skills you're interested in for future opportunities.
- ***View Job Profiles:*** Access profiles of organizational roles and their requirements.
- ***Search and Compare Profiles:*** Compare job profiles to identify skills gaps or career progression opportunities.
- ***Profile Approval History:*** Review the history of approvals for updates to your talent profile.
- ***Training Summary:*** View completed training sessions and certifications.
- ***Request Training Enrollment:*** Submit requests to enroll in specific training courses.
- ***Training Request Status:*** Track the approval status of training enrollment requests.
- ***Professional Training:*** Access information on advanced training programs for professional development.
- ***Education:*** Record formal educational qualifications and degrees.
- ***Honors and Awards:*** Document any accolades or recognition received professionally or academically.
- ***Languages:*** List language proficiencies relevant to your role or career development. Not available to all users
- ***Memberships:*** Record memberships in professional organizations or associations. Not available to all users
- ***RI Development Plan:*** Create and track Research Initiative (RI) development plans. Not available to all users
- ***RI Development Review:*** Evaluate progress and achievements related to RI development plans. Not available to all users
- ***RI Observation:*** Document observations and feedback related to Research Initiatives. Not available to all users
- ***RI KPI Review:*** Review key performance indicators (KPIs) specific to Research Initiatives. Not available to all users

- **Recruiting:** Facilitates internal job applications and candidate referrals.
  - ***Careers:*** Browse and apply for internal job postings or opportunities within the organization.
  - ***Routing Response:*** Route responses to job applications to the appropriate team members for review.
  - ***Interview Evaluations:*** Record feedback and evaluations from interviews to assess candidate suitability.
  - ***Interview Calendar:*** View and manage interview schedules and availability for candidates and interviewers.
  - ***Interview Team Schedule:*** Coordinate and manage the schedule for all team members involved in candidate interviews.

- ***Evaluate Open Ended Questions:*** Review and assess responses to open-ended questions from job candidates.

- **Self Service eForms:** Digital forms for specific HR processes, such as the following:

  Outside/Dual Employment Request: Request approval for secondary employment.

- **Wellness Leave Request:** Submit and manage leave requests related to wellness or health needs.
- **Critical Policy Review/Attestation:** Review and acknowledge compliance with important City policies.
- **Leave Buy Back:** Apply to convert unused leave into monetary compensation as per policy.
- **Manage Delegation:** Assign or update authority for specific tasks or transactions to another employee.