



Taking the Next Step with Employee Self-Service

Sondra Evans (Ramona) and Tatiana Patton (SDCOE EBS)



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Session Topics


- Welcome & Introductions **(5 min)**
- Your District's ESS Options and How to Take a "Next Step" **(15 min)**
- Guest speakers: Bill Dowler, Sharon Pacheco **(15 min)**
 - Bill Dowler (SDCOE): "Our experience with ESS after nearly 4 years"
 - Sharon Pacheco (Lemon Grove): "Our experience with additional ESS functionality after 1 month"
 - Sondra Evans (Ramona): "Motivated to move forward with view-only access"
- Roundtable Discussion **(15 min)**
 - What areas of ESS do you use or would like to implement?
 - What are some considerations or concerns associated with ESS for your district?
- The Future of ESS: "Fluid" **(5 min)**
- Wrap up & Closing **(5 min)**

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Your District's ESS Options and How to Take a "Next Step"

Updating Personal Information, Viewing Benefits, Viewing/Forecasting Absences

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PeopleSoft Employee Self-Service (ESS) is a web-based interface that allows employees to access their information in one place. ESS can be accessed remotely from any network, device and browser compatible with PeopleSoft applications.

Every district uses View Paycheck.

View Paycheck

- View Paycheck
- Compensation Split
- View W2
- Update My Profile

Your District's ESS Options

View Personal Information

Edit Personal Information

View Benefits

View Absence Balances


View Absence History

Enter Absence Requests
(and Approvals for Managers)

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OTHER PAGELETS: Travel & Expenses, Personnel Action Forms (PAFs)

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View Personal Information

Looking to take a baby step into ESS?

Consider activating "Personal Information Summary" only!


Personal Information

Personal Information
Review and update your personal information.

Personal Information Summary ← **READ ONLY**

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Personal Information Summary Expand All Collapse All



Lucille Ball
Manager - Classified
Actions ▾

↑

"VIEW ONLY" PAGE

▶ Name

▼ Home/Mailing Addresses

Addresses

Address Type	Status	As Of	Country	Address
Home	Current	10/03/1996	USA	San Diego, CA 92105 USA ← See what's entered in PeopleSoft

Change Home/Mailing Addresses

○ Phone Numbers

▶ Emergency Contacts

▶ Email Addresses

▶ Instant Message IDs

▶ Marital Status

▶ Ethnic Groups

▶ Employee Information

Contact the Human Resources department if any of your Employee Information is incorrect.

Employees can view what was entered by the HR Department ("what's on file") on a read-only page called Personal Information Summary. Made available in February 2018.

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Personal Information Pagelet

Edit Personal Information

If you are ready for employees to make edits...

Activate the Personal Information pagelet so employees can update information.

Personal Information

Personal Information
Review and update your personal information.

- Home and Mailing Address
- Phone Numbers
- Email Addresses
- Emergency Contacts
- Personal Information Summary

Phone Numbers

Phone Type	Telephone	Extension	Preferred	Delete
Business	858/555-1212	1212	<input checked="" type="checkbox"/>	🗑️
Home	619/555-0000		<input type="checkbox"/>	🗑️

Add Phone Number

Save

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Benefits Pagelet

View Benefits

If you would like employees to view benefits...

Activate the **Benefits Information** pagelet so employees can view their health care summary, dependents, and more.

Benefits

Benefits Information
Review health, insurance, savings, pension or other benefits information.

- Health Care Summary
- Savings Summary
- Savings Contribution Summary
- Benefits Enrollment

Benefits Summary

Type of Benefit	Plan Description	Coverage or Participation
Medical	Kaiser HMO	Employee + 2 or more
Dental	Delta Dental Premiere \$1500 AT	Employee + 2 or more
Vision	VSP Veba After Tax	Employee Only

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Time Reporting Pagelet

View Absence Balances

View Absence History

If your district uses PeopleSoft Absence Management and you would like employees to view absence information.....

Activate the **Time Reporting (for Absences)** pagelet so employees can view their absence balances and request history.

Time Reporting


Time Reporting
Report and review your time, schedules, request absences and more.

- Absence Request History
- Absence Balances

Absence Request History Personalize | Find | View All

Absence Name	Status	Start Date	End Date	Duration	Requested By
Vacation	Approved	08/31/2018	08/31/2018	2 Hours	Employee Absence Request
Vacation	Approved	08/27/2018	08/27/2018	8 Hours	Employee Absence Request
Vacation	Approved	08/24/2018	08/24/2018	4.5 Hours	Employee Absence Request
Personal Necessity	Approved	08/14/2018	08/14/2018	2 Hours	Employee Absence Request
Vacation	Approved	07/23/2018	07/27/2018	40 Hours	Employee Absence Request

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If you want to go big bang...

That means turning on **Absence Requests** for your district.
That is not within the scope of this session (...not "taking the next step").

For more information on turning on the full-blown Absence Request functionality, please watch the "Entering Absence Requests in PeopleSoft ESS" demo on the Third Thursday Video page at <http://crc.sdcoe.net/calendar/peoplesofttraining/thirdthursdays>.

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4. ESS Functionality *

Please respond Yes/No to indicate which ESS functionality you would like to activate for your organization. Please understand that pagelets marked "Data Entry" mean that employees would have the ability to enter data through ESS - we recommend that you communicate and train your employees prior to your Go Live date.

	No, not at this time	Yes	I don't know
Personal Information Summary Screen (Read Only)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Personal Information Pagelet (Data Entry)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Benefits Information Pagelet (Read Only)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Absence History and Balances (Read Only)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Absence Request (Data Entry and Approvals)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

5. Start Date


What is your preferred "Go Live" date to have these pagelets turned on in ESS? Please leave plenty of time for data validation, configuration, and communications within your organization (recommended 4-8 weeks based on the size of your district or charter school).

Date

mm/dd/yyyy

PeopleSoft ESS Participation Form

When you are ready to turn on any additional ESS functionality, submit the form available at <http://crc.sdcoe.net/links> in the "Requests" section.



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Guest Speaker:

“Our experience with ESS after nearly 4 years”

Bill Dowler, SDCOE, william.dowler@sdcoe.net

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Bill Dowler, SDCOE: Our experience with ESS after 3 years of turning on additional functionality

- **SDCOE has used all ESS functionality since January 2015.**
- **Functionality currently in use by all districts:**
 - We LOVE the “Forgot My Password” service – saves us a lot of time with ITS service requests. Built this into New Employee Orientation.
 - As we have continued to migrate more payroll items from Additional Pay to Multiple Components of Pay, the “Compensation Split” feature allows employees to better understand the components that make up their “Regular” wages
 - Employees value that they can access ESS from home – they can pull paycheck info (and submit absences) any time
 - Employees retain access to their check stubs and W-2s indefinitely
- **Additional functionality we enabled:**
 - Employees can update their own personal information – relieving our HR staff from manually entering on their behalf

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Guest Speaker: “Our experience with additional ESS functionality after 1 month”

Sharon Pacheco, Lemon Grove, spacheco@lemongrovesd.net

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Sharon Pacheco (Lemon Grove): Our experience with additional ESS functionality after 1 month

- **Lemon Grove decided to enable additional ESS pagelets starting 10/1/18:**
 - Personal Information
 - Benefits Viewing
 - Absence Viewing
- **A couple of reasons led us to take the next step with ESS:**
 - New Superintendent and others supportive of “tech”
 - Wanted a time-saver for open enrollment and benefits changes

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Sharon Pacheco (Lemon Grove): Our experience with additional ESS functionality after 1 month

- Piloted the new functionality for 3 weeks with about 15 people**
 - Pilot participants were both district office and site staff (some site secretaries, a health clerk).
 - Asked them to take a look at the new pagelets.
 - No challenges or problems.
- Feedback from pilot:**
 - "Love it, no complaints. I added more emergency contacts."
 - "I like it. I think it's a great feature for information to be accessed."
 - "This will be beneficial for all users. I like the ability to see days off taken."
 - "Confirms Benefits and 403 plans."
 - "Easy to update my Personal Information."
- Question that came up: How are we going to know when people change their information?**
 - Query checks personal address change. `M_HR_ADDR_UPD_BY_EE`

OUR EMAIL TO PILOT PARTICIPANTS

Good Morning,


You are receiving this email, because you were selected to pilot a new ESS feature. It should be available later today. When you login to PeopleSoft ESS, you will now see new options such as Personal Information and Benefit Information.

Please check them out and provide feedback to me. We plan on rolling this out to employees as of October 1st.

Please let me know if you have any questions.

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Sharon Pacheco (Lemon Grove): Our experience with additional ESS functionality after 1 month

- How we prepared for the transition leading up to 10/1/18:**
 - Sent out an email to all staff the week before Go Live
 - Moved the `M_SECURITY_LEVEL1` role to IT staff so they can help reset employees' passwords
 - Will have IT support the ESS functionality
- How it's been going since 10/1/18**

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“Motivated to move forward with view-only access”

Sondra Evans, Ramona, sevans@ramonausd.net

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Sondra Evans (Ramona):

“Motivated to move forward with view-only access”

- Our District has been in PeopleSoft for 2.5 years now using only view paystubs and W-2s. We are motivated to move forward and let the employees have more access even if it is just view only.
- **How we weighed the pros and cons:**
 - We watched the Thursday Demo to get more information
 - We received more information how hour employees can have the view only to monitor their information
- **Next steps:** We are now going to move forward in the next few months to view the Personal Information and possible benefits and vacation and sick leave balances. This way our employees can at least look at the screen to start learning how to access this information before we move to the next step.

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Roundtable Discussion

What areas of ESS do you use or would like to implement?
What are some considerations or concerns associated with ESS for your district?

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The Future of ESS: “Fluid”

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The Future of ESS: Fluid

- With the next PeopleSoft upgrade (targeted 2019) the look of many screens will change to “Fluid” style.
- ESS will have a different home page, where ESS categories will be grouped into “tiles” instead of pagelets.



ORACLE Employee Self Service

Time: [Icon of person and clock]

Pay: [Icon of money] Last Pay Date **12/15/2017**

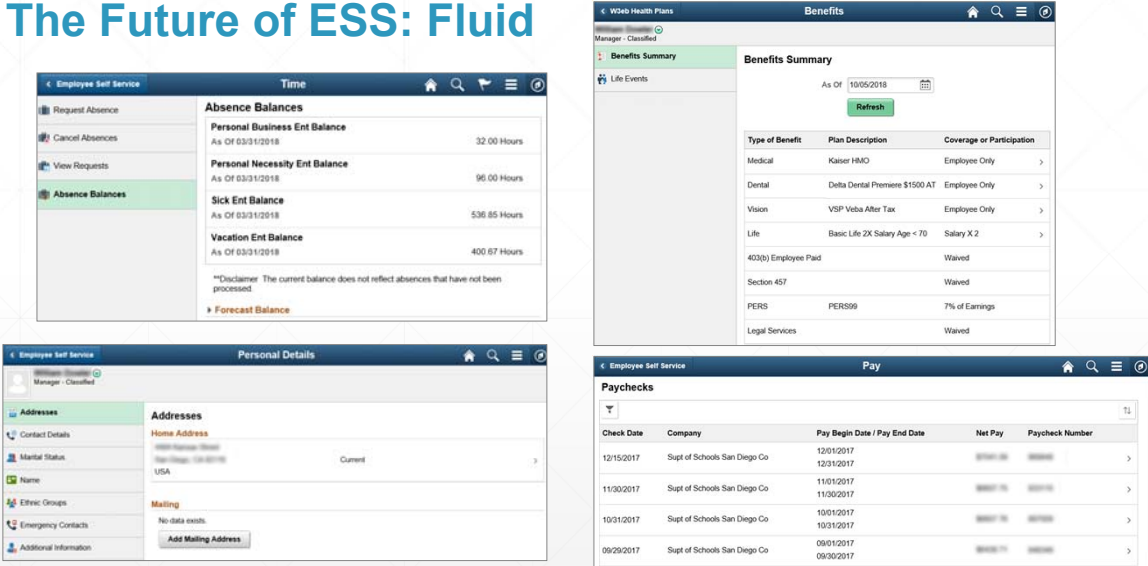
Personal Details: [Icon of person]

Benefits: [Icon of person, house, and cross]

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The Future of ESS: Fluid



Absence Balances

Personal Business Ent Balance As Of 03/31/2018	32.00 Hours
Personal Necessity Ent Balance As Of 03/31/2018	96.00 Hours
Sick Ent Balance As Of 03/31/2018	536.85 Hours
Vacation Ent Balance As Of 03/31/2018	400.67 Hours

Benefits Summary

Type of Benefit	Plan Description	Coverage or Participation
Medical	Kaiser HMO	Employee Only
Dental	Delta Dental Premier \$1500 AT	Employee Only
Vision	VSP Verba Alter Tax	Employee Only
Life	Basic Life 2X Salary Age < 70	Salary X 2
403(b) Employee Paid		Waived
Section 457		Waived
PERS	PERS99	7% of Earnings
Legal Services		Waived

Personal Details

Addresses

Home Address	Current
1234 Main Street San Diego, CA 92101 USA	

Mailing: No data exists. Add Mailing Address

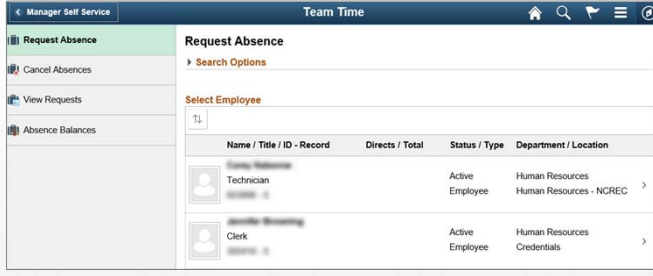
Paychecks

Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number
12/15/2017	Supt of Schools San Diego Co	12/01/2017 / 12/31/2017	\$1,234.56	000001
11/30/2017	Supt of Schools San Diego Co	11/01/2017 / 11/30/2017	\$1,234.56	000002
10/31/2017	Supt of Schools San Diego Co	10/01/2017 / 10/31/2017	\$1,234.56	000003
09/29/2017	Supt of Schools San Diego Co	09/01/2017 / 09/30/2017	\$1,234.56	000004

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The Future of ESS: Fluid

If your district implements ESS Absence Management, approvers will see the Manager Self Service option in addition to Employee Self Service on the home page.

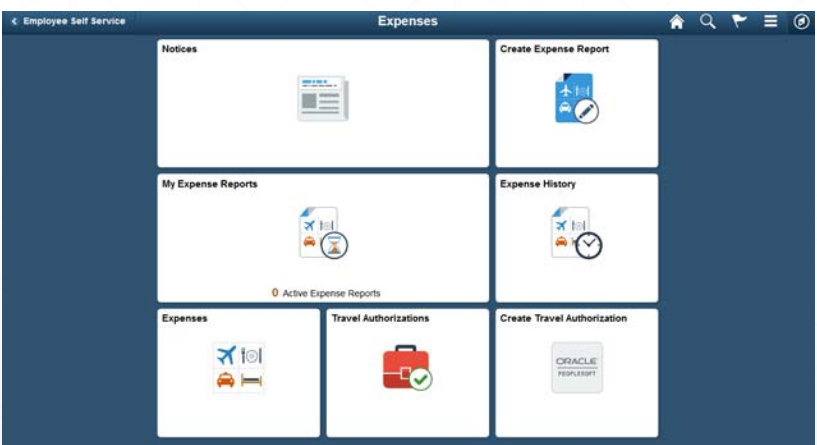


The Future of ESS: Fluid

For districts that use Travel & Expense module additional tiles will be available.

Just like in the current ESS, T&E users will be able to:

- Create and submit Travel Authorizations and Expense Reports;
- Review expense history;
- Managers will be able to approve pending transactions.



Session Notes

These slides and session notes are published on the CRC Website.
<http://crc.sdcoe.net/peoplesoftconference>