University of Houston System

PeopleSoft Employee Self-Service Guide

Contents

Accessing Employee Self-Service (PASS)

What's New?

The University of Houston System is upgrading our PeopleSoft HR environments with the latest technology released by Oracle. When you log in, you will see the Employee Self-Service homepage with tiles. Each of the tiles is interactive, making it easy for you to access and navigate the system. Many of the existing functions have been upgraded to be mobile-friendly. (Many more are coming soon!) For example, employees can submit absence requests from their phones, and managers can approve from their phone (or any mobile device).

Instructions in this document are based on accessing the system via a laptop or desktop computer. Accessing the application through a mobile device may change the layout of the tiles and pages.

Here's a legend for the tools you see on the header, top right:

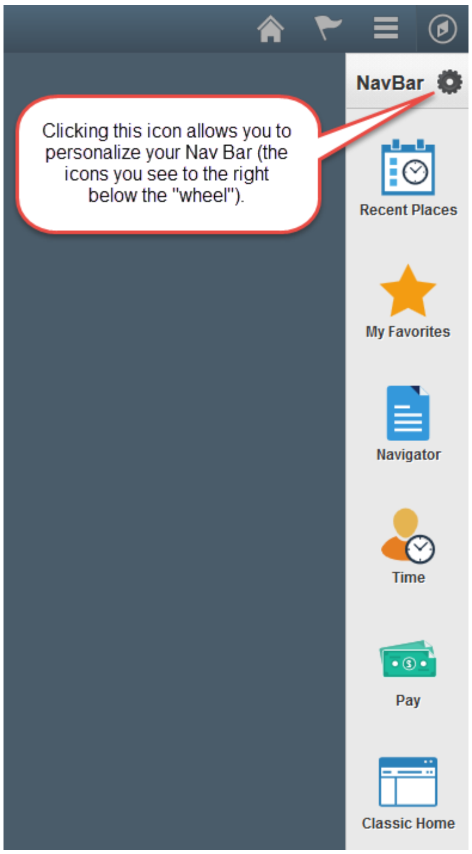
 (***Home***) Tap to return to the main PeopleSoft Home page

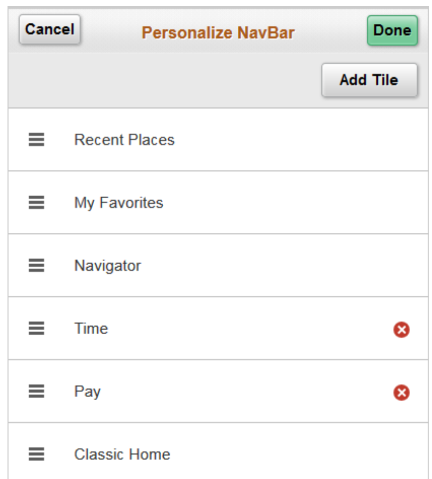
 (***Notifications***) Tap to view actions and alerts in a notifications window

 (***Actions List***) Frequently called "the hamburger," tap to see a list of available actions for the current window. The Sign Out command is always available under this menu, as are context-appropriate personalization options.

 (***Nav Bar***) Tap to use the Navigation Bar (Nav Bar). The Nav Bar provides handy navigation options such as Recent Places, My Favorites, Navigator (which expands to show the classic menu hierarchy), and Classic Home. Users can also add and remove fluid tiles from the Nav Bar using personalization options found here.

Navigation Bar





Recent Places

When you click this icon you will see the most recent places you have navigated.

My Favorites

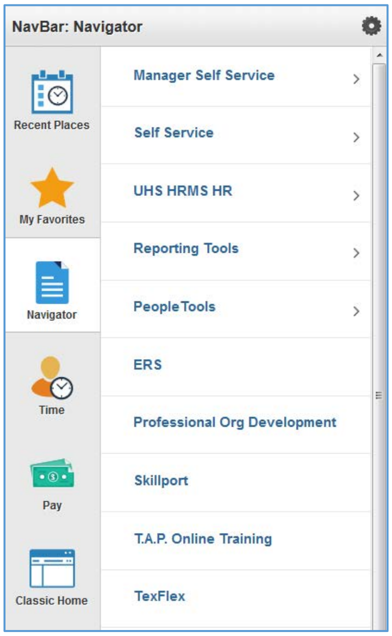
This configurable icon allows you to determine your favorites to display here. Favorites that you have saved prior to this update will be accessible here.

Classic Home

Clicking on this icon will take you to the “Classic” home, as used in prior versions of PS. If you run reports, work with eForms, or do other transaction tasks within PeopleSoft, you can use the Classic Home to navigate through the system.

Navigator

Clicking on this icon will present the main menu in a linear layout.

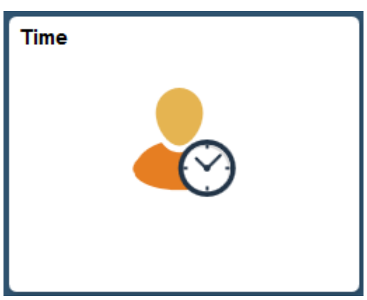


Tiles

Tiles found on the Employee Self Service home page can also be added to the NavBar for quick access.

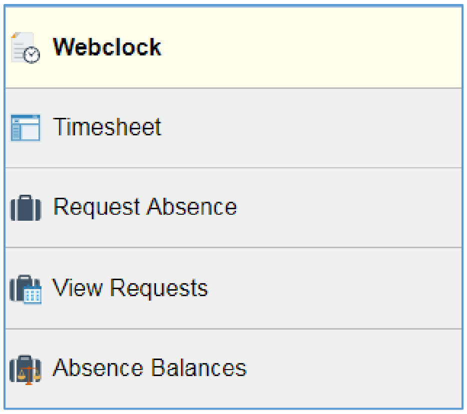
Now, let's see what's inside those tiles!

Time Tile



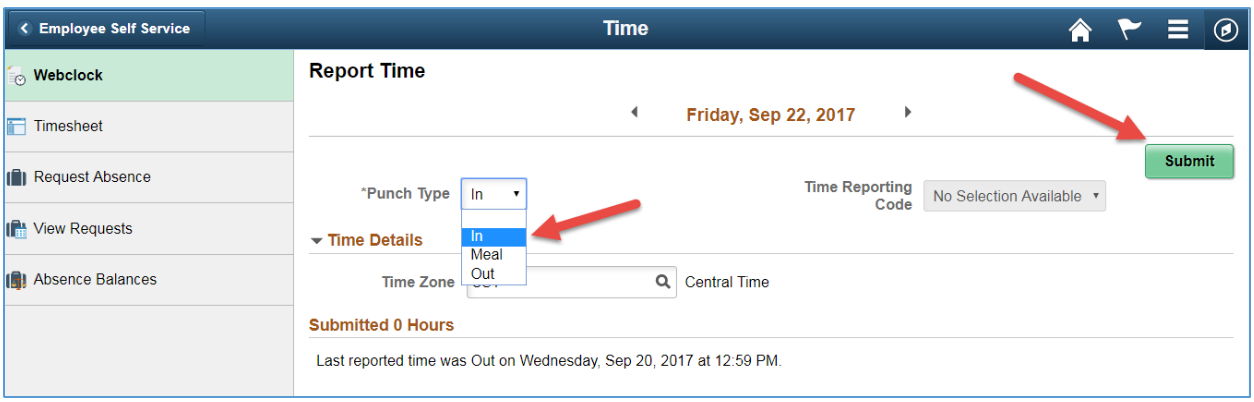
Contents of the Time Tile

The Time tile is used for reporting time (webclock), viewing your timesheet, requesting leave, and viewing absence history and balances. If you use the webclock to record time, the system will default to the Report Time task. If you do not use the webclock, this option will not display.

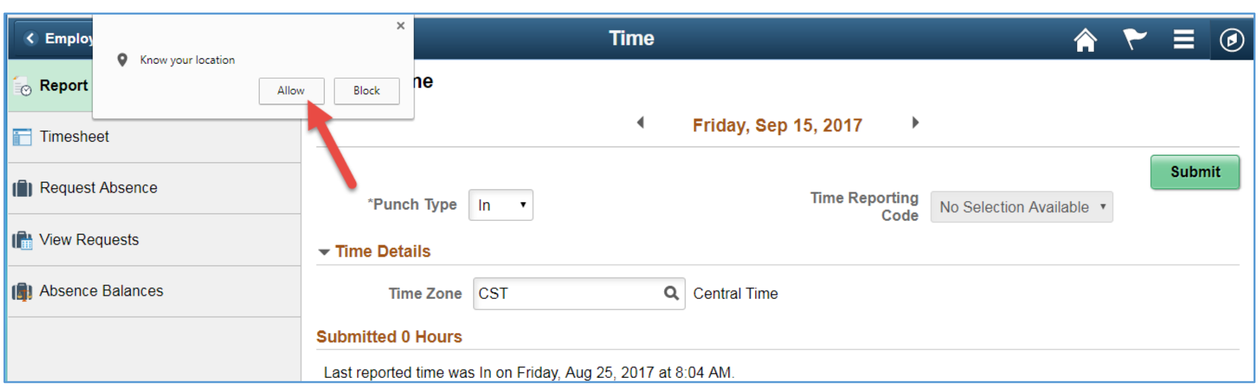


Webclock - Hourly

Hourly employees that clock in/out using the webclock will navigate to the Time tile to record their time. Select the Punch Type and click Submit. The system does display the last reported time on the bottom of the page. Employees should not clock in/out from your phone unless previously approved by your manager.

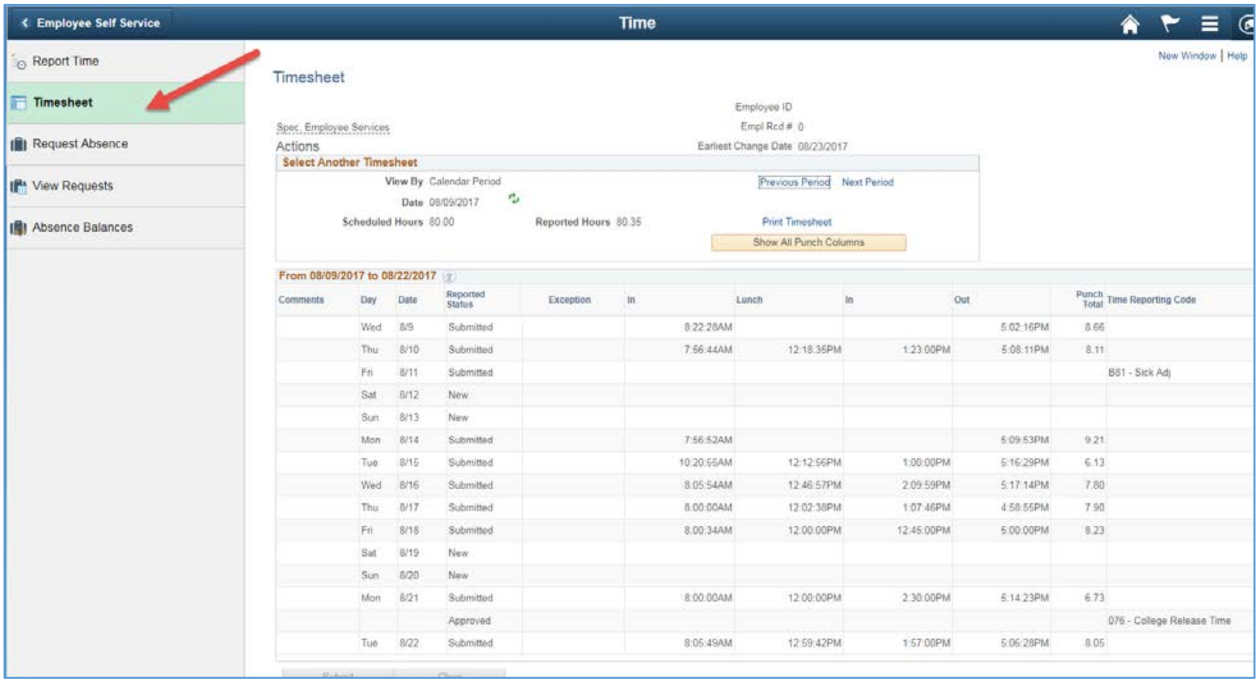


You will be prompted to share your location. Click the Allow button.



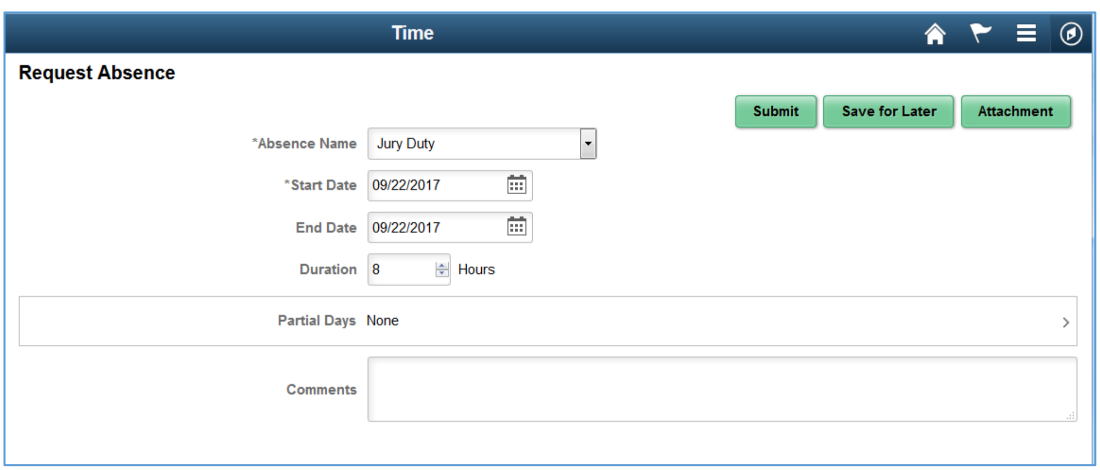
View Timesheet

Use the Timesheet page to view current and previous pay periods. Hourly employees can view their punch times on this page.



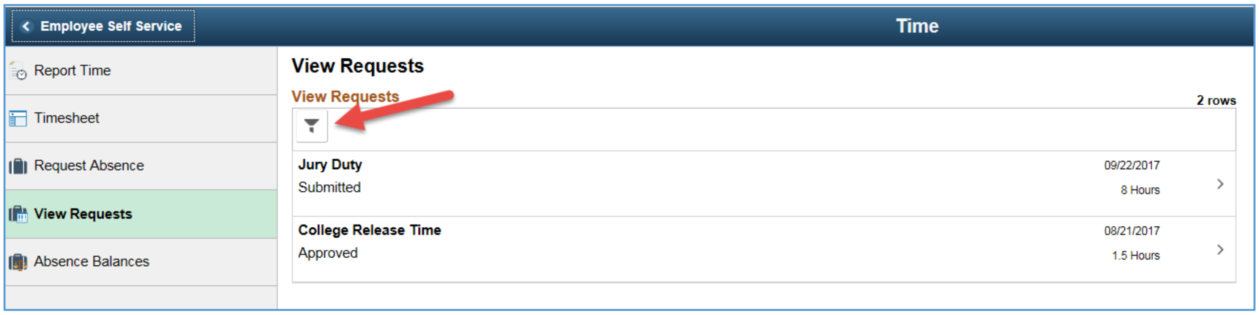
Request Absence

Use the Request Absence option to submit a leave request. Select the absence type and dates, then click Submit. If you need to attach a document, click the Save for Later button before submitting. To access saved absences, click the View Requests option on the left navigation pane.

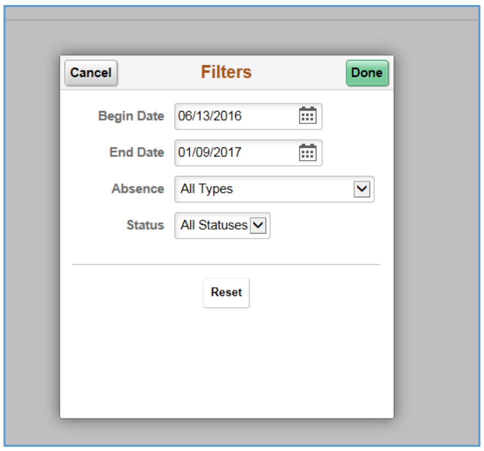


View Requests

To view absence history, click the View Requests task. The most recent requests display. To view older requests, click the filter button.

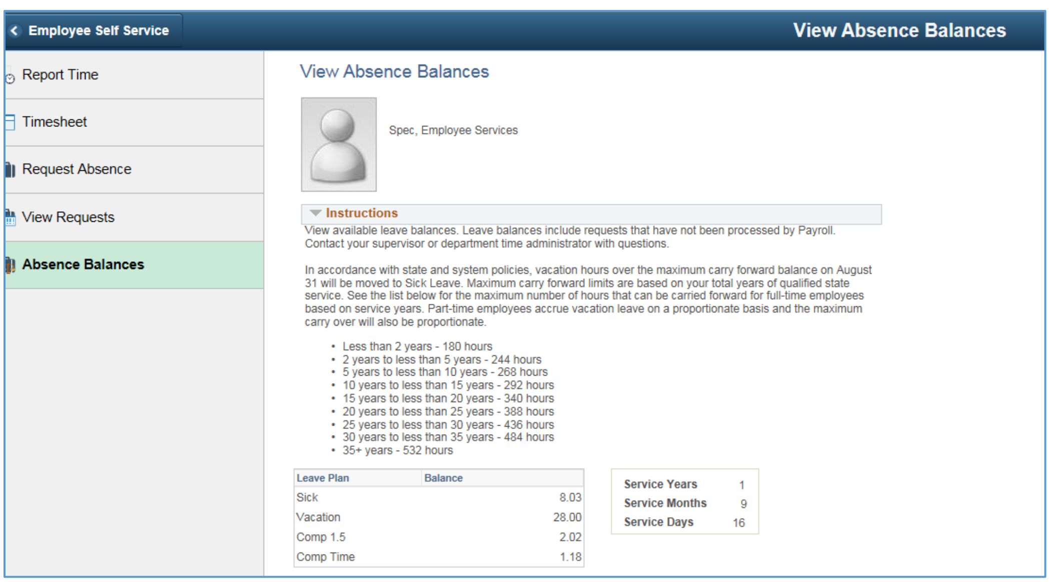


Update the filter options and click the Done button. The system displays the records that match the criteria entered.

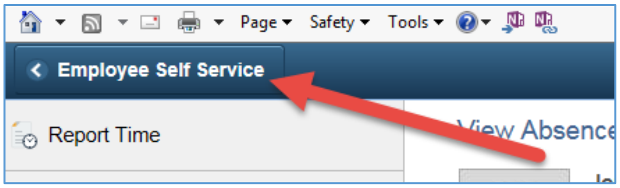


Absence Balances

To view your current balances, click the Absence Balances option.



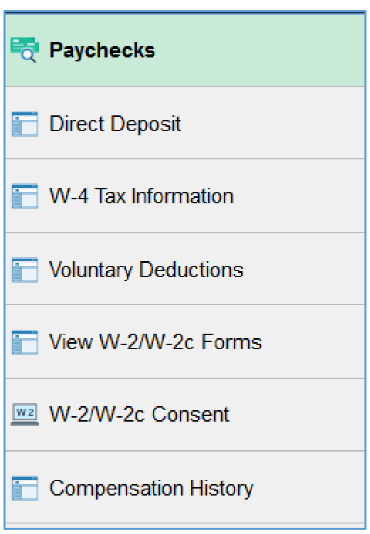
From within the tiles, use the Employee Self Service button in the upper left corner to return to the homepage.



Payroll & Compensation

The payroll and compensation tile includes pages related to data for processing your paycheck, such as direct deposit and W-4 elections, as well as access to view paycheck and W-2 information.

Contents of the Payroll Tile

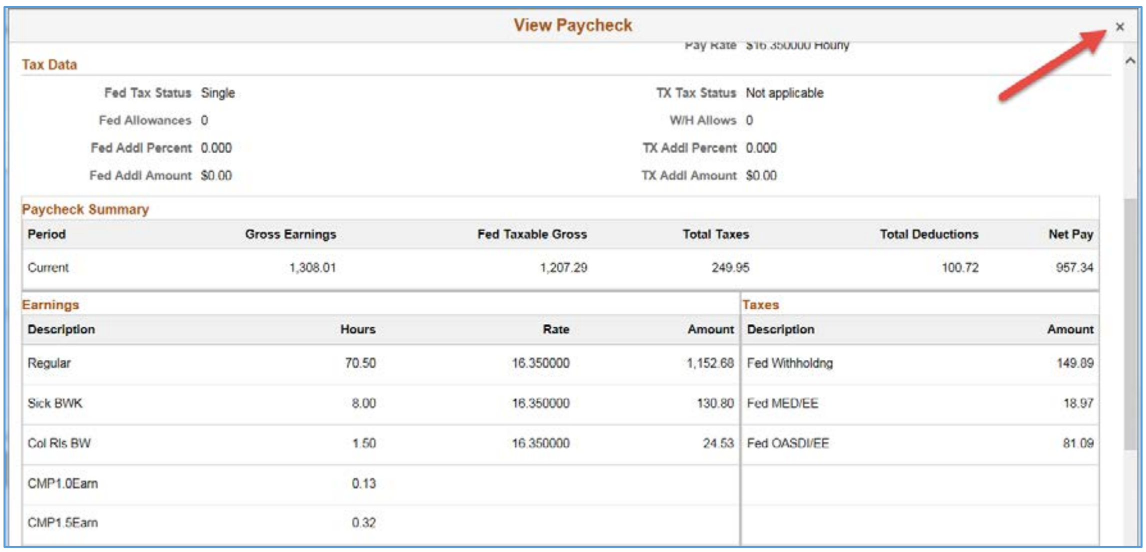


Click on each of the content pages to view or take action as needed.

Paychecks

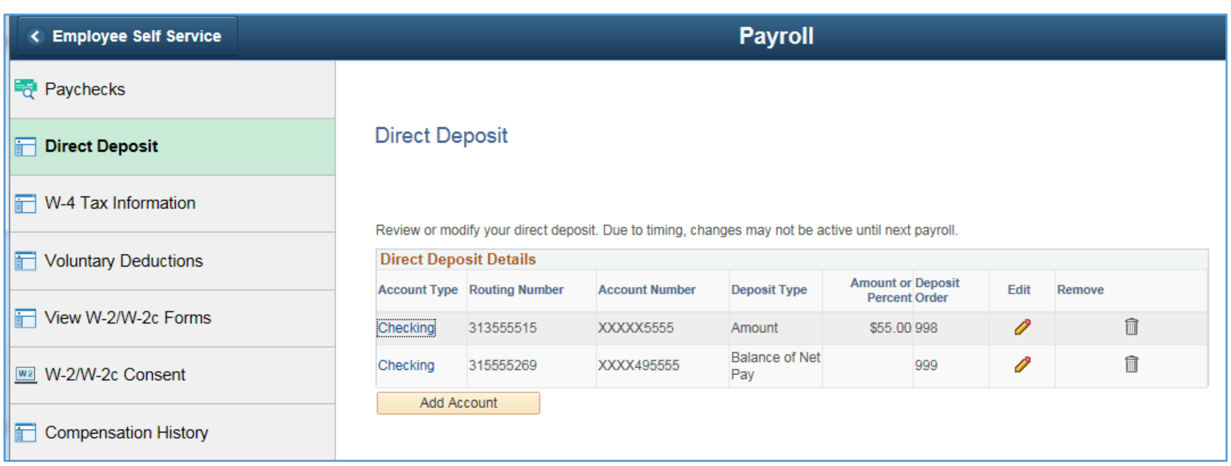
The system displays a list of the most recent paychecks. Click on the check line to view the details. To view a different set of paychecks, click the filter button and update the date range.

The paycheck displays in a scrolling window. Scroll up and down to view your entire paycheck. When you are finished, click the "X" in the upper right corner to return to the tile tasks.



Direct Deposit

The system displays your current direct deposit elections. To add a new bank account, click the Add Account button. To edit or delete an existing account, select the icon on the appropriate bank account line. Remember, for security purposes, when changing direct deposit data, you must know your primary account information.

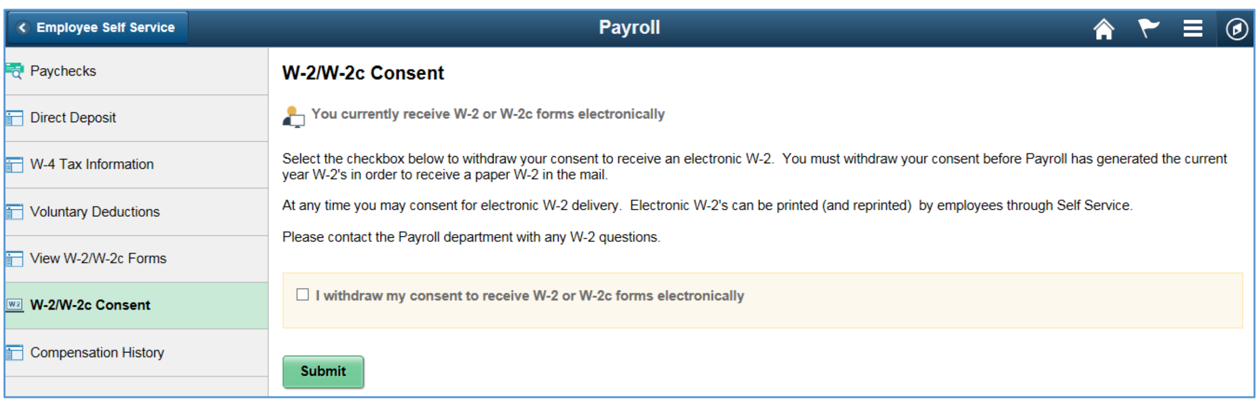


Voluntary Deductions

Use the Voluntary Deductions page to enroll into optional donation plans. You can enter a goal amount, or goal date. Once you reach the goal, the system will automatically stop the deduction.

W2 Forms and Consent

Use the View W-2 task to view and print your yearly W-2's. To elect to receive electronic copies of your W-2, use the W-2 Consent page. Once you enroll in electronic W-2, all future forms will be online.



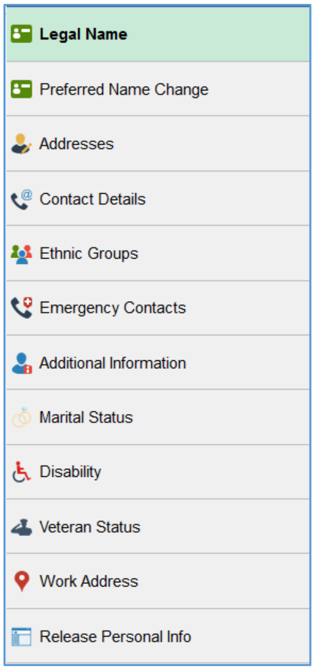
Compensation History

This page displays all historical compensation rate changes.

My Personal Info

The My Personal Info tile includes pages for you to view and/or update your name, contact and other personal data elements.

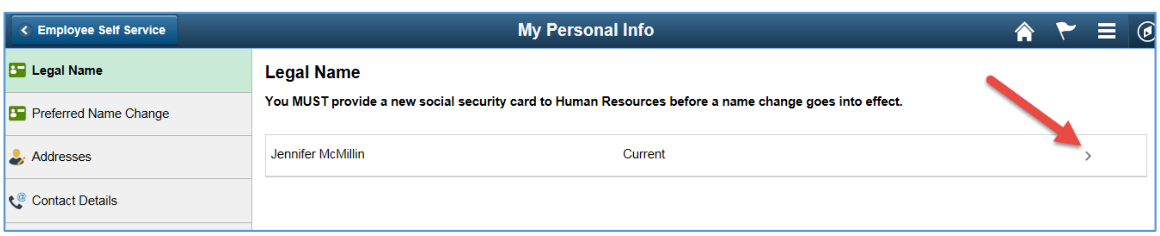
Contents of the My Personal Info Tile



Legal Name/Preferred Name

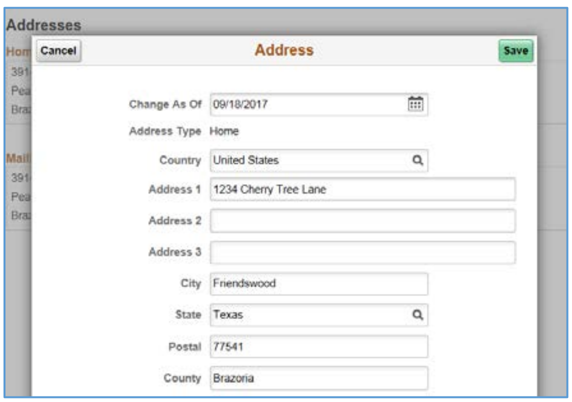
Use the Legal Name and Preferred Name options to update your name in the system. Please note, if you are changing your legal name, you must provide updated documentation to Human Resources. The request for name change is sent to Human Resources for approval. Preferred name is used by sub-systems, such as email or directories. Preferred name does not need to be approved.

To change your legal name, click the name record and enter the new information.



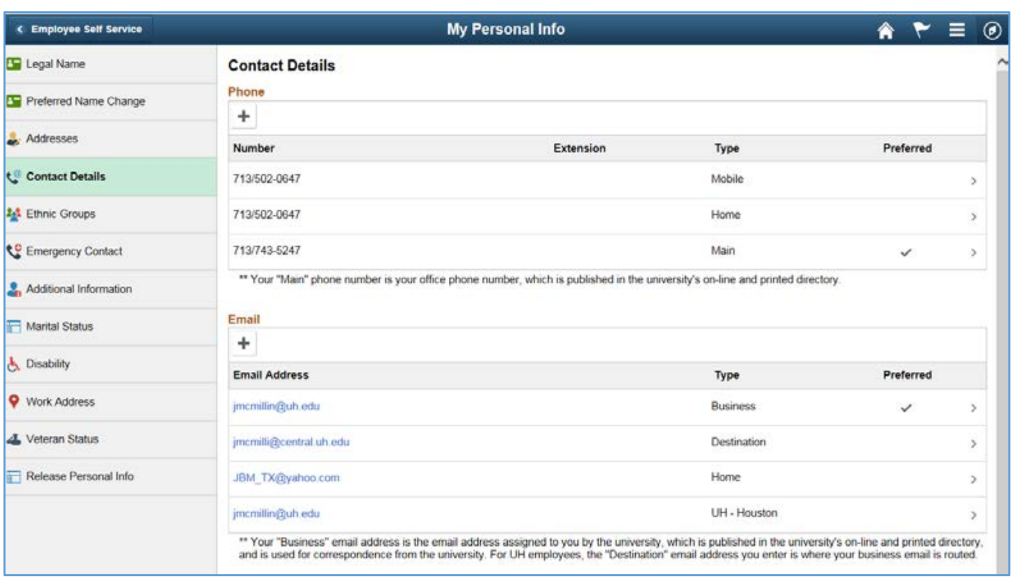
Addresses

Use the Addresses task to update your home and/or mailing address. Please remember, if you opt for a hard copy W-2, it is important to keep your address current in the system. To change your address, click on the selected record.



Contact Details

Use the Contact Details page to view and update your phone and email addresses. To update, select the record and enter the new data. Remember, business email addresses cannot be changed.



Ethnic Groups

Use the Ethnic Groups option to view and/or update your ethnicity in the system.

Emergency Contact

Use the Emergency Contact page to view and/or update your contacts. To update the phone or address for an existing contact, click the contact name. To add a new contact, click the (+) icon.

Additional Information

The Additional Information section displays your DOB, SSN, and start dates. If this data is incorrect, please contact Human Resources.

Marital Status

Use the Marital Status task to update your current status. Marital status changes are submitted to Benefits for review and validation.

Work Address

Use the Work Address option to view your current building and room. This information displays in the online directories. If your building and room is incorrect, please contact your department administrator or HR representative.

Veteran Status

Use the Veteran Status page to view and update your current status.

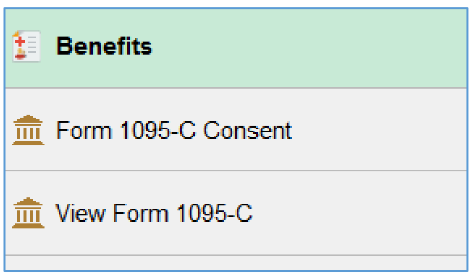
Release of Public Info

Use the Release of Public Info option to review and update your current elections. The University often receives requests for employee data. If you have elected NO for an option, that information will not be provided in a standard public information request. For more information regarding the release of information, please click here to review the Texas government code.

Benefits Summary

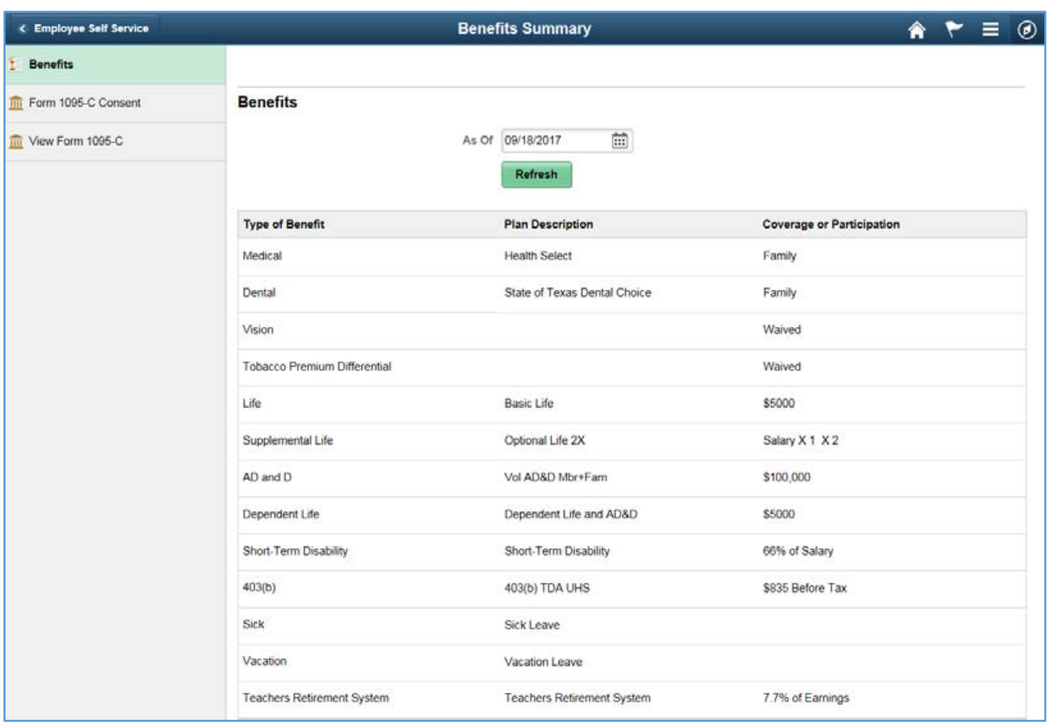
The Benefits Summary tile allows you to view your benefit enrollment information as well as consent to and view electronic 1095-C forms.

Contents of the Benefits Summary Tile



Benefits

Use the Benefits page to view your current elections. Changes to benefits elections must be done in the ERS system.



Type of Benefit	Plan Description	Coverage or Participation
Medical	Health Select	Family
Dental	State of Texas Dental Choice	Family
Vision		Waived
Tobacco Premium Differential		Waived
Life	Basic Life	$5000
Supplemental Life	Optional Life 2X	Salary X 1 X 2
AD and D	Vol AD&D Mbr+Fam	$100,000
Dependent Life	Dependent Life and AD&D	$5000
Short-Term Disability	Short-Term Disability	66% of Salary
403(b)	403(b) TDA UHS	$835 Before Tax
Sick	Sick Leave	
Vacation	Vacation Leave	
Teachers Retirement System	Teachers Retirement System	7.7% of Earnings

1095-C Consent and Forms

Use the 1095-C options to view your historical forms, as well as elect to receive the form electronically. Once you elect to receive them electronically, all future forms will be online.

Total Rewards

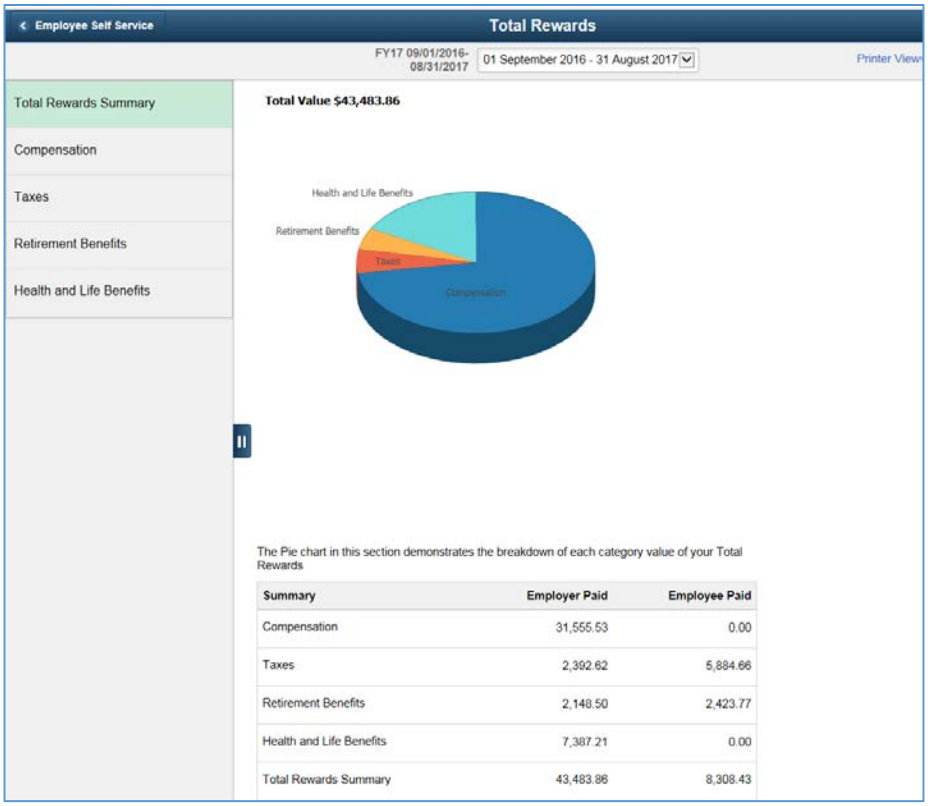
What is Total Rewards?

We are pleased to roll out Total Rewards this year! Total Rewards is a statement that shows the value of your hard work at the University of Houston. You can see in a snapshot your paid earnings, paid leave time, the taxes you paid, your retirement contributions, and your health and life insurance contributions. The reward statement will be updated each September for the prior fiscal year. The statement you will see here is for fiscal year 2017, which is dated 9/1/16 – 8/31/17.

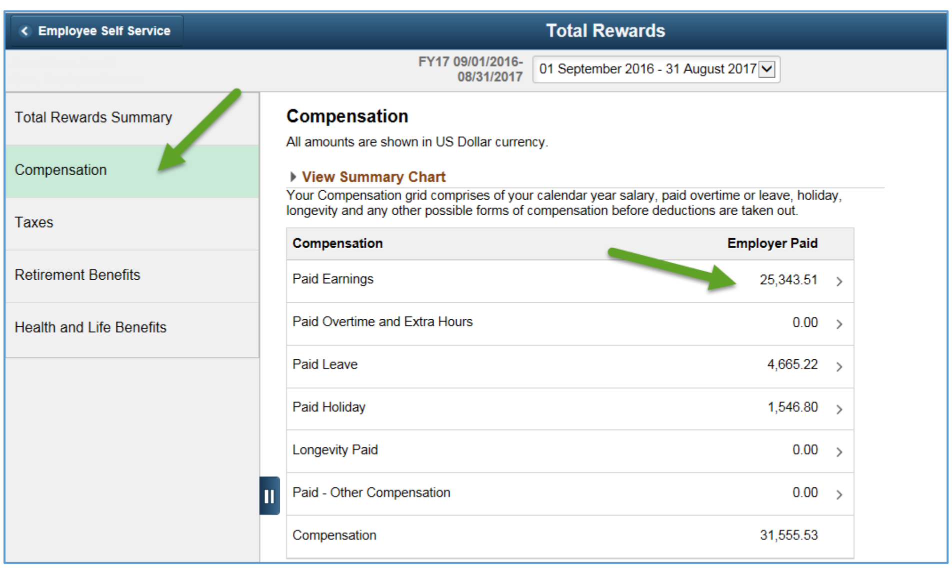
If you hover your mouse over the pie chart, you will see the percentages of each "piece of the pie." As you view each category of reward item on the side bar, you will see your contribution as well as the University's contribution in Taxes, Retirement Benefits, and Health and Life Insurance, providing a visual of your Total Rewards package.

If you have questions regarding your statement, please see contacts below:

- Compensation – contact the Compensation Team
- Taxes - contact the Payroll Team at hrpay@Central.uh.edu
- Retirement and/or Health and Life Insurance – contact the Benefits Team



To view the details associated to any of the categories, select the desired option (Comp, Taxes, Retirement, or Benefits). Once in the category, click on a record to view additional details.



Miscellaneous

The miscellaneous tile allows for quick access to other commonly used self-service pages including links to student and finance pages.

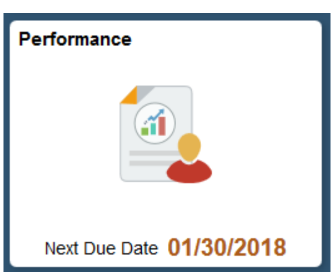
Contents of the Miscellaneous Tile

- **Manage Delegation**
- eTermination Checklist
- Change My Password
- UHS Change Password Help
- My Campus Account
- AP Direct Deposit
- Employee Payment Inquiry
- Concur Travel Management

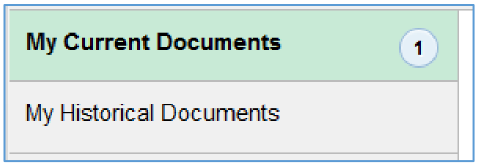
Click on each of the content pages to view or take action as needed. The Manage Delegations task allows you to view your current TRAM delegations. The eTermination Checklist only displays for University of Houston employees.

Performance

Use the Performance tile to access current and historical ePerformance documents. You will notice that the Next Due Date (if applicable) is on the Performance tile. This tile will only display for University of Houston employees.



Contents of the Performance Tile



Current Documents

Your current documents display. Click on the record to launch the ePerformance workcenter. From the workcenter, you can view your performance criteria, complete your self-evaluation, and view the final manager evaluation.

My Current Documents

Document Type	Document Status	Period Begin / Period End	Next Due Date
Performance Document	Evaluation in Progress	01/01/2017 12/31/2017	01/30/2018

Historical Documents

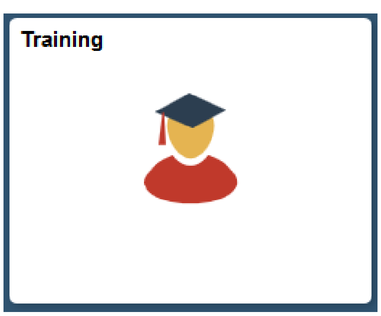
Select the Historical Documents task to view all prior year performance evaluations. Click on a record to launch the ePerformance workcenter for the historical document.

My Historical Documents

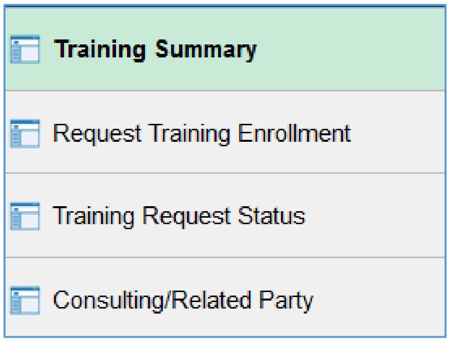
Document Type	Document Status	Period Begin / Period End
Performance Document	Completed	01/01/2016 12/31/2016
Performance Document	Completed	01/01/2015 12/31/2015
Performance Document	Completed	01/01/2014 12/31/2014

Training

The training tile allows you to enroll in training, view training history as well as complete your annual disclosure information.

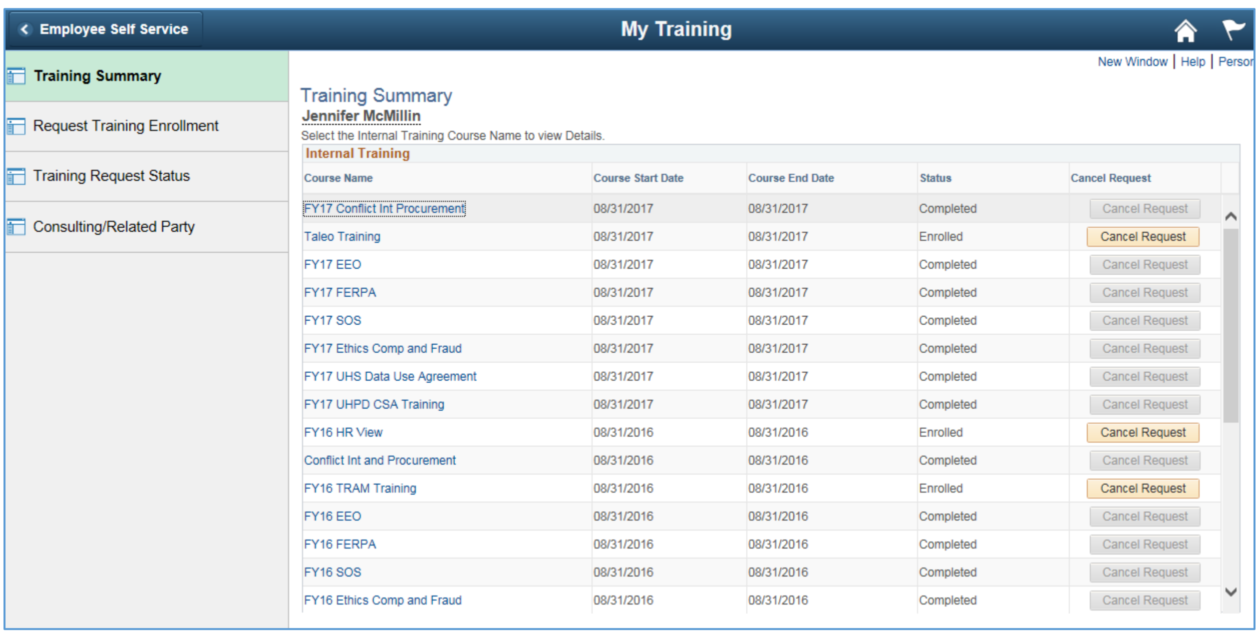


Contents of the Training Tile



Training Summary

Use the Training Summary to review all current and historical training requests. From here, you can cancel any pending training requests.



Course Name	Course Start Date	Course End Date	Status	Cancel Request
FY17 Conflict Int Procurement	08/31/2017	08/31/2017	Completed	Cancel Request
Taleo Training	08/31/2017	08/31/2017	Enrolled	Cancel Request
FY17 EEO	08/31/2017	08/31/2017	Completed	Cancel Request
FY17 FERPA	08/31/2017	08/31/2017	Completed	Cancel Request
FY17 SOS	08/31/2017	08/31/2017	Completed	Cancel Request
FY17 Ethics Comp and Fraud	08/31/2017	08/31/2017	Completed	Cancel Request
FY17 UHS Data Use Agreement	08/31/2017	08/31/2017	Completed	Cancel Request
FY17 UHPD CSA Training	08/31/2017	08/31/2017	Completed	Cancel Request
FY16 HR View	08/31/2016	08/31/2016	Enrolled	Cancel Request
Conflict Int and Procurement	08/31/2016	08/31/2016	Completed	Cancel Request
FY16 TRAM Training	08/31/2016	08/31/2016	Enrolled	Cancel Request
FY16 EEO	08/31/2016	08/31/2016	Completed	Cancel Request
FY16 FERPA	08/31/2016	08/31/2016	Completed	Cancel Request
FY16 SOS	08/31/2016	08/31/2016	Completed	Cancel Request
FY16 Ethics Comp and Fraud	08/31/2016	08/31/2016	Completed	Cancel Request

Request Training and Training Status

Use the Request Training Enrollment task to enroll in a course online. The training request is sent to TAP in a nightly batch process. If it is an online course, you can log into TAP the next day to access the training. Use the Training Request Status page to validate the request has been submitted.

Consulting/Related Parties

The Consulting/Related Parties form should be completed at least once a year. If you plan to do consulting, this form should be completed prior to the start date.

Approvals

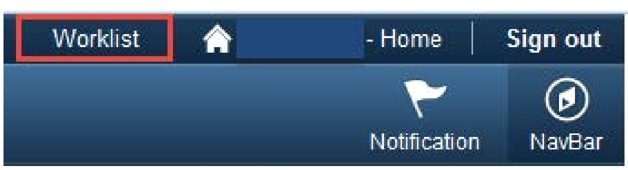
The Approvals tile provides access to items that require your approval, such delegation requests. You will notice that there is a number in the lower right-hand corner of the Approvals tile. This indicates that you have documents requiring your approval.

Contents of the Approval Tile

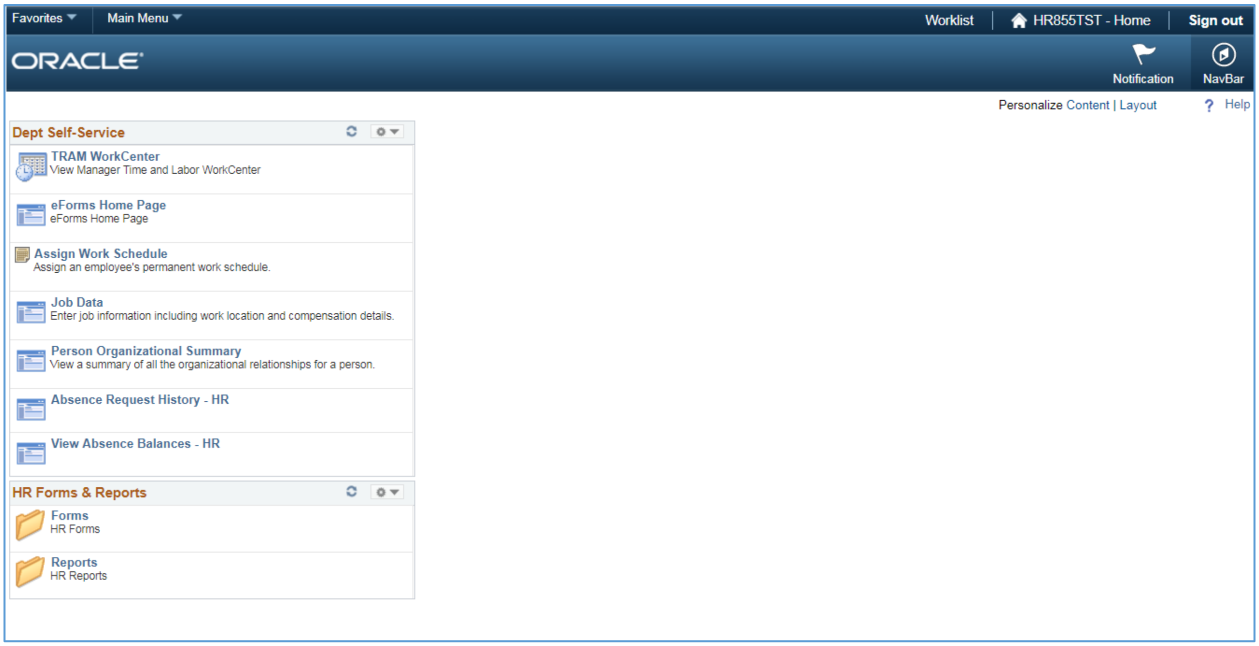
If a manager delegates TRAM tasks to you, you will find the link to accept the delegation request here. Select each transaction to view more information or take action on this approval item.

Worklist

If you are an eForms approver, you will navigate to the Classic home page, where the link for the work list appears in the top right menu. Remember, to access the Classic Home, click the NavBar in the upper right corner.



From the Classic Home page, you can access your Favorites, the full drop-down Main Menu, or utilize the quick links, such as TRAM Workcenter or eForms Home page.


Favorites
Main Menu
Worklist
HR855TST - Home
Sign out
ORACLE
Notification
NavBar
Personalize Content | Layout
Help
Dept Self-Service
TRAM WorkCenter
View Manager Time and Labor WorkCenter
eForms Home Page
eForms Home Page
Assign Work Schedule
Assign an employee's permanent work schedule.
Job Data
Enter job information including work location and compensation details.
Person Organizational Summary
View a summary of all the organizational relationships for a person.
Absence Request History - HR
View Absence Balances - HR
HR Forms & Reports
Forms
HR Forms
Reports
HR Reports