State of Oklahoma
Employee Self Service Manual

Revised: March 31, 2010

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Document History

Doc Rev	Date	Description
1.0	02/03/2009	Initial Document
1.1	06/15/2009	Revised to update screen shots to comply with Federal Section 508 accessibility standards
1.2	06/25/2009	Included the General Profile Page
1.3	09/17/2009	Included reminder concerning year-to-date totals that are only reflected on the most current paycheck
1.4	10/22/2009	Provided leave balances reflected in hours, as well as message and reminder about printing the payroll advice.
1.5	02/24/2010	Inserted Forgot Your Password Section
1.6	03/31/2010	Activation of the Employee Self Service account will be provided by the OSF Help Desk. The Leave Statement was added.

Employee Self Service

Objectives

1. Sign On and Navigate
2. Update Records
   - Phone Number
   - Email Address
   - Emergency Contacts
3. View Records
   - Personal Information Summary
   - Paycheck
   - Voluntary Deductions
   - Direct Deposit
   - Compensation History

Overview

Employee Self-Service, (ESS) is a web-based application that provides employees with information related to their employment. The release of ESS provides the employee the ability to view and maintain human resource and payroll data in the Human Resource/Payroll System.

ESS provides an excellent opportunity for you to ensure that the HR/Payroll information is accurate and kept up to date. The information can affect the accuracy of your employment data, including the pay and benefits you receive.

One of the advantages of the ESS system is the data in real-time data.

The following table describes the components that will be used.

Page Name	Page Description
Personal Information	Personal Information Summary, Phone Numbers, Email Addresses, Emergency Contacts
General Profile Information	Password, Personalizations, Alternate User, Workflow Attributes, Email
Payroll and Compensation	View Paychecks, Voluntary Deductions, Direct Deposit, View Compensation History

Step I – Signing Into Your System

1. Call the Office State Finance Help Desk to activate your Employee Self Service Account

   OSF Help Desk Phone Numbers: 405 521-2444 or 866 521-2444 (Toll Free)

2. Open your Internet web browser – Explorer.

3. **Enter** Employee Self Service Link: https://corehr.ok.gov/mrhri/signon.html

4. You may see a security alert message; **click** to proceed.

The PeopleSoft sign-in page will appear:

5. **Enter** your User ID and the Password supplied by the OSF Help Desk. User ID and Password are case sensitive.

   User ID – your 6 digit Employee ID

   Password: – The initial password will be provided by the OSF Help Desk.

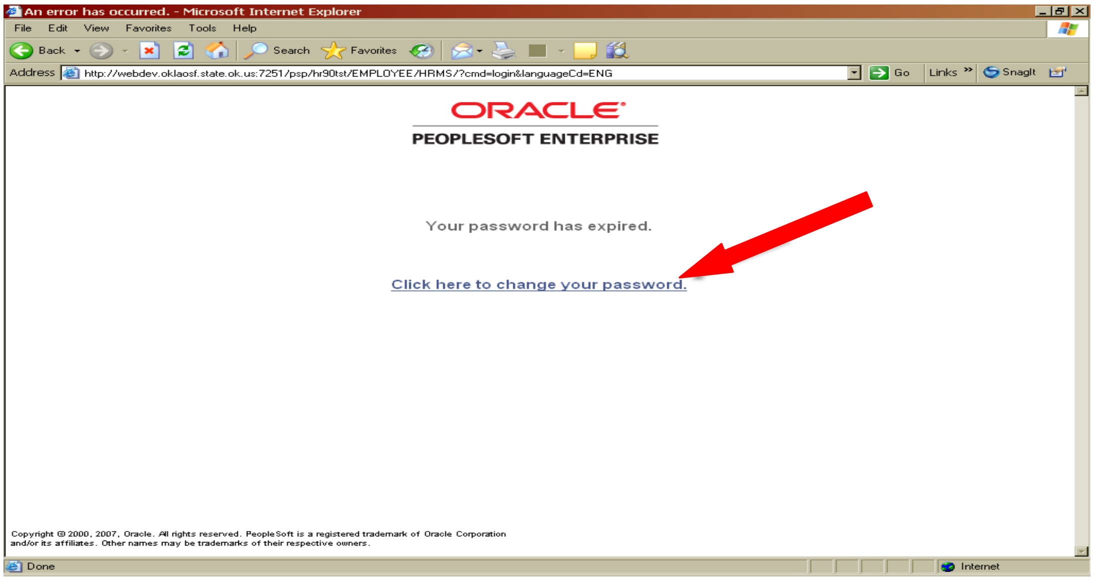
   OSF Help Desk Phone Numbers: 405 521-2444 or 866 521-2444 (Toll Free).

NOTE: Passwords always appear as asterisks in the display as you type them. If the password is entered incorrectly three (3) times, **ESS** will automatically lock out the user. After the initial login, if you stop before the third incorrect entry, you may still use the Forgot Your Password link to reset your password. To have your password reset due to lock out, call the Office of State Finance Help Desk Phone Numbers are 405 521-2444 or 866 521-2444 (Toll Free).

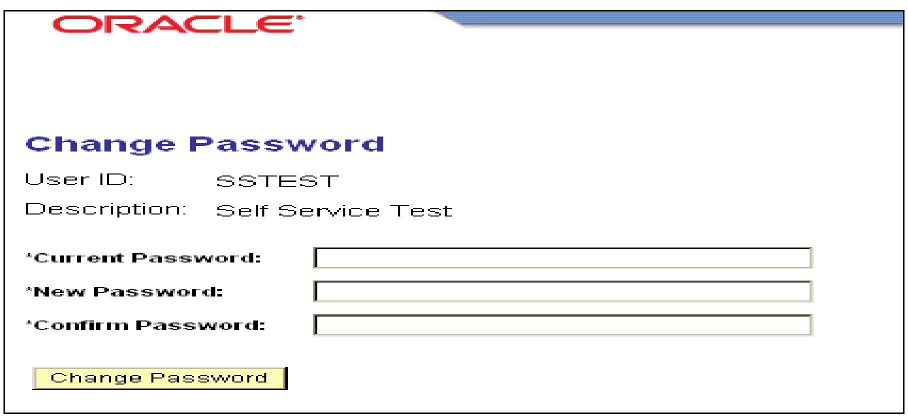
Click Sign In

The PeopleSoft online system will validate your User ID and Password.

The first time you sign on to the system the following screen will appear.



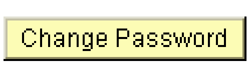
6. **Click** **Click here to change your password** link.



Current Password – When you call the OSF Help Desk, you will receive the initial/current password. An asterisk (*) in front of a field indicates it is a required field to complete.

New Password – Type in a new password. New password must be at least 8 (eight) characters and contain at least 1 (one) number. You can use both CAPITAL and/or lower case characters. Your password will expire every 90 days.

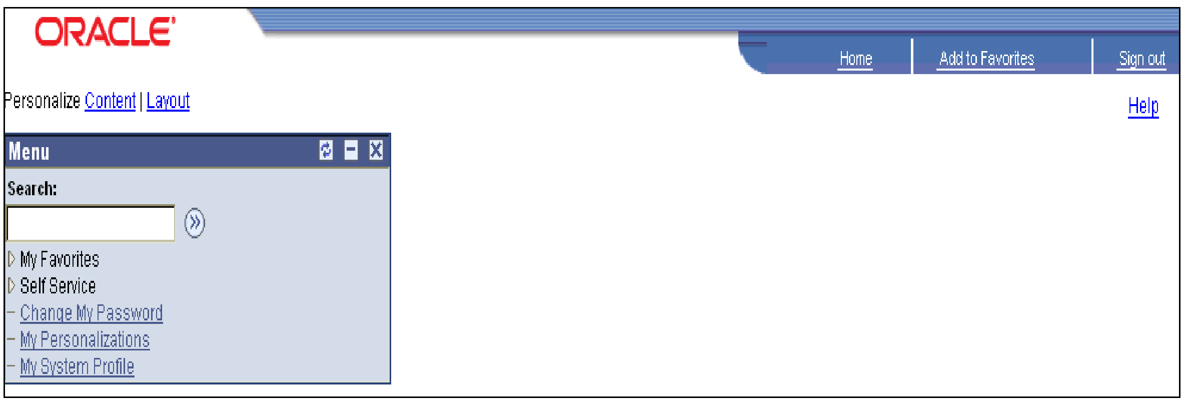
Confirm Password – Retype the new password.

Click 

and the following message will appear.

Click 

The system will display the following:



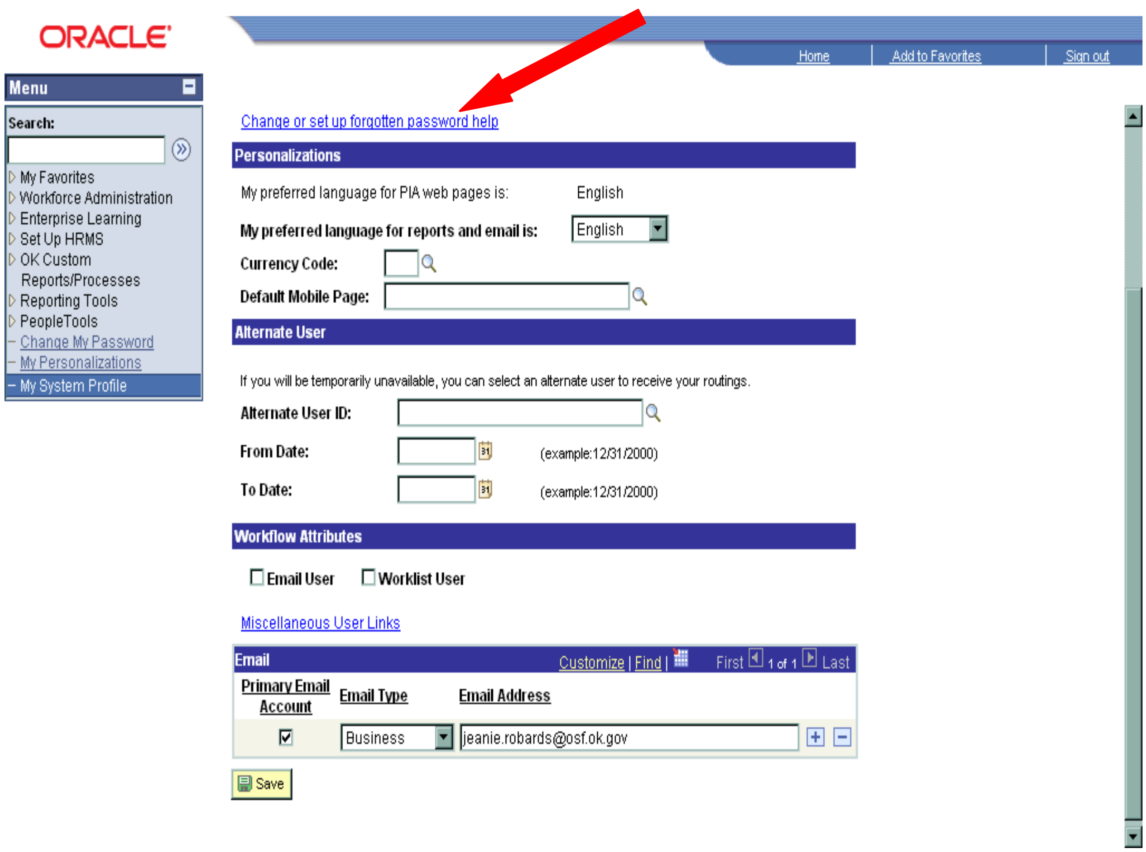
NOTE: There are three (3) menu options on the top right hand corner of the web page Home, Help, and Sign out.

- "Home" will take you to the first page. If you get lost, selecting "Home" will bring you back to the beginning.
- "Sign Out" option will log you out.
- "Help" option is not functional, at this time.

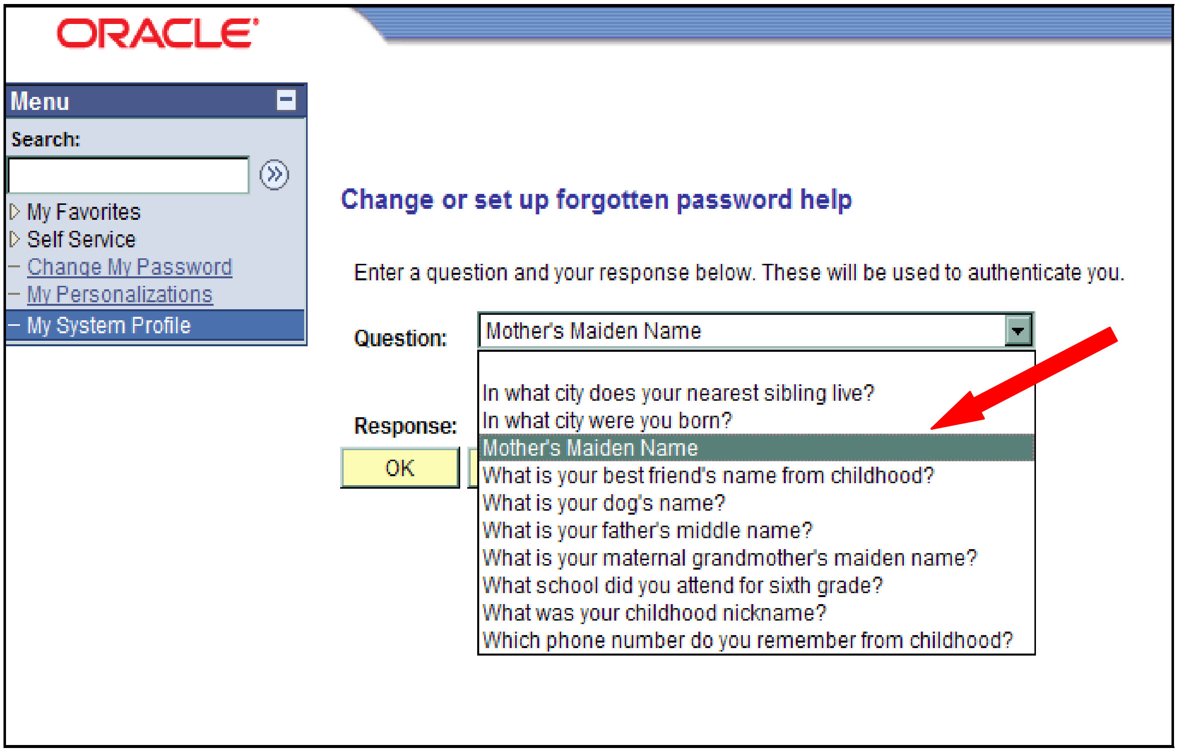
Step II – Changing My System Profile

In order for the Office of State Finance Help Desk to ensure you are the person requesting a password reset, you must complete the **General Profile Information Page under My System Profile link**. In addition, in order for you to use the Forgot Your Password steps, you must have completed the Change or set up forgotten password help process.

Navigation: My System Profile



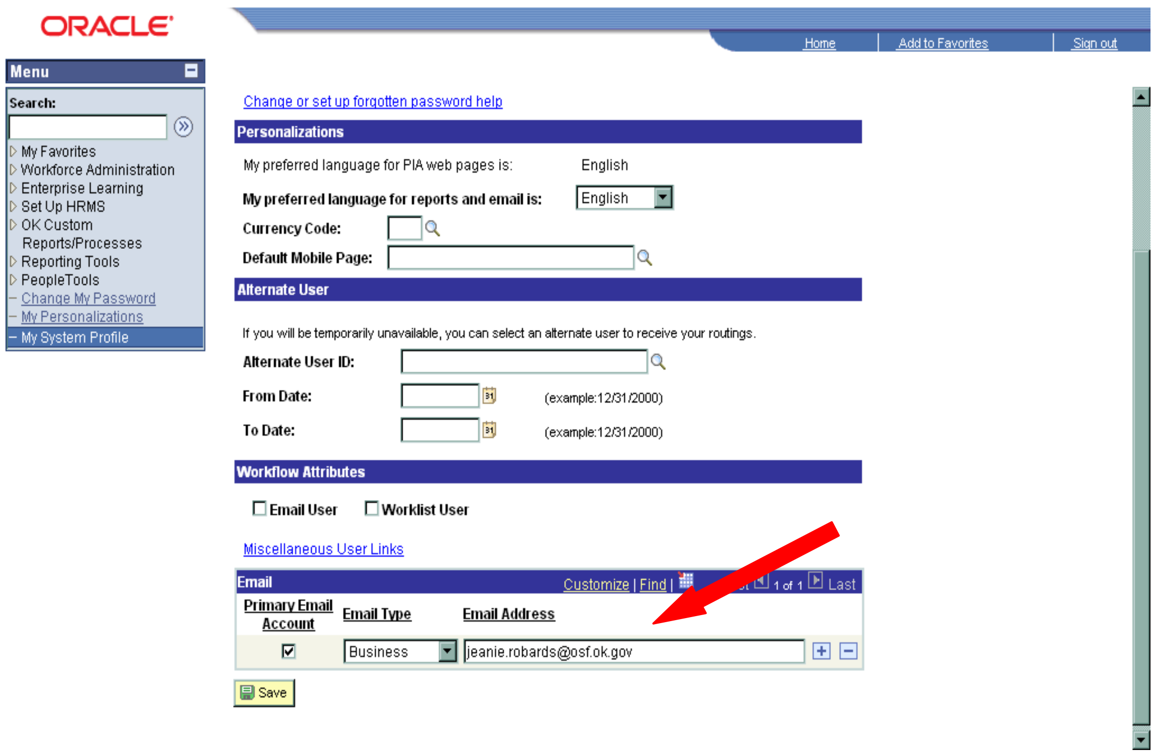
Click Change or set up forgotten password help link.



Question – **Select** drop down menu and choose a question.

Response – **Enter** the answer to the question selected.

Click OK .



The Personalizations and Alternate User sections will not be utilized at this time.

In the Email Section: **Select** the Primary Email Account box, on the Email Type field, **click** drop down menu and choose **Business** and in the Email Address field **enter** your agency's Email address. To add another e-mail address, **click** , choose Email Type and **enter** email address. If more than one (1) type of Email is entered, one (1) of the Emails **must** have the Primary Email Account box checked. If you do not have Email, **enter** your supervisor's Email address.

NOTE: The Emails on the General Profile Information Page and Personal Information Page provides separate functions within the various PeopleSoft modules. After the Email(s) have been entered on both pages, the system will provide employees with proper and timely notifications.

REMINDER: Your Email(s) must be updated whenever there is a change to the address.

Click Save .

Forgot Your Password

Overview

In the Employee Self Service, **(**ESS**)** application, there is a capability to Reset your own password after the initial log-in, however, you must be aware of a few issues.

NOTE: If you have not previously set up your challenge question in the My System Profile link within ESS application, please call the Office State Finance Help Desk at 405 521-2444 or 866 521-2444 (Toll Free) to reset your password.

NOTE: If the password is entered incorrectly three (3) times, **ESS** will automatically lock out the user. If you stop before the third incorrect entry, you may still use the Forgot Your Password link to reset your password. To have your password reset due to lock out, call the Office of State Finance Help Desk Phone Numbers are 405 521-2444 or 866 521-2444 (Toll Free).

Following are dates when ESS will not be available.
Maintenance Schedule:

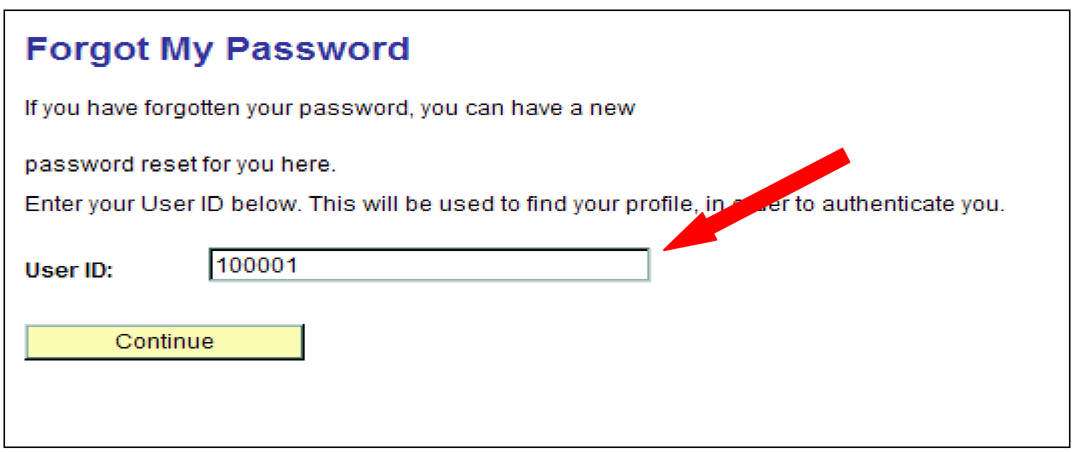
- 2nd Saturday of each month
- 4th Saturday of each month
- 2nd Weekend of each quarter

Maintenance Schedule Link:
http://www.ok.gov/OSF/OSF_Help_Desk/Helpdesk_-_PeopleSoft_System_Availability.html

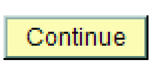
Step 1

Click [**Forgot your password**](#)**?** link.

Step 2



In the User ID Field: **Enter** your six (6) digit Employee User ID number.

Click 

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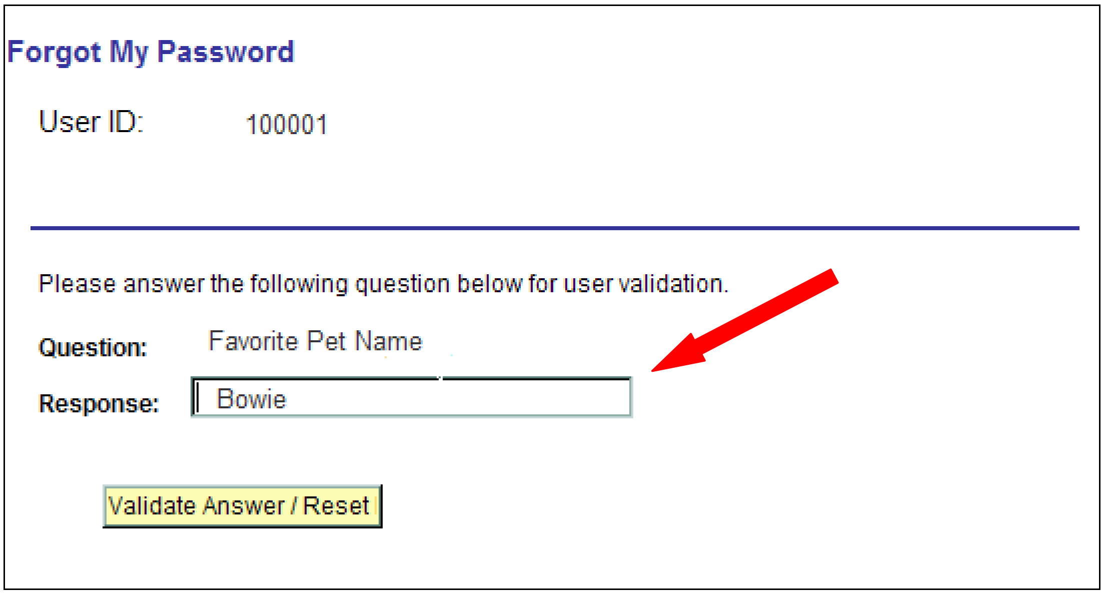
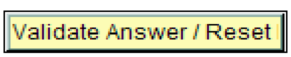
Step 3



System Prompts: Security Question you previously answered.

In the Response Field, **enter** <u>your</u> response to the question.

Click 

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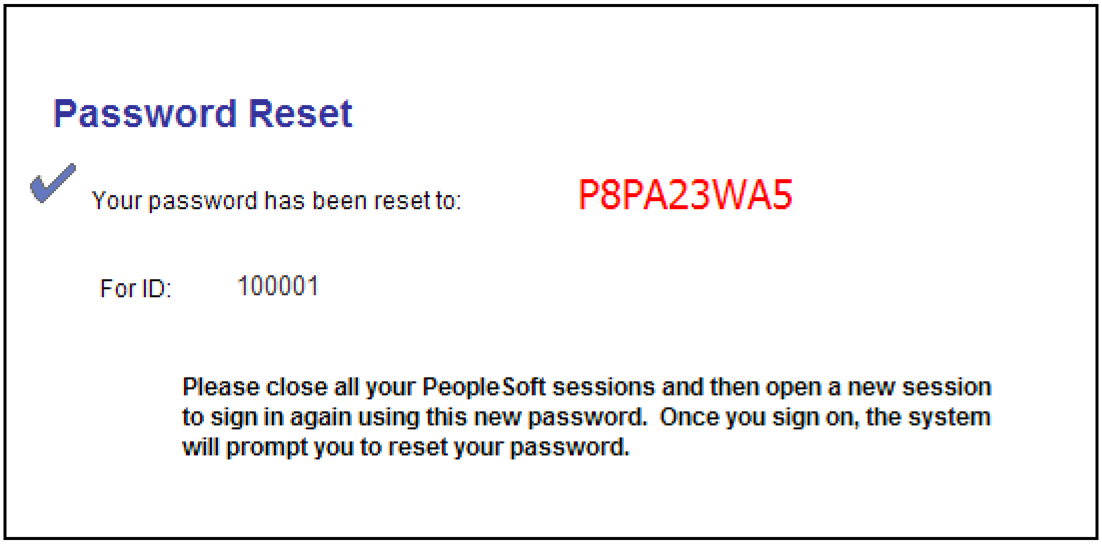
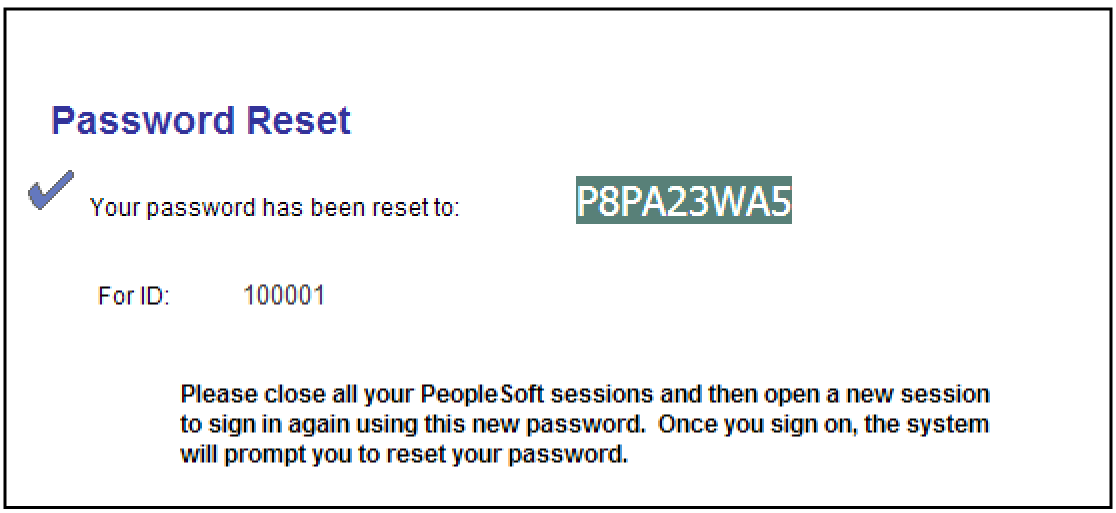
Step 4



The reset password is temporary.

SUGGESTION: Write down the Temporary Password and note the Temporary Passwords are a mixture of numbers and CAPITAL letters.



Highlight and copy the RESET CODE**.** **HINT:** Control C to copy the Reset Code.

Exit Employee Self Service.

Click File

Click Exit.

Step 5

Log into Employee Self Service.

Employee Self Service Login Link: https://corehr.ok.gov/mrhri/signon.html

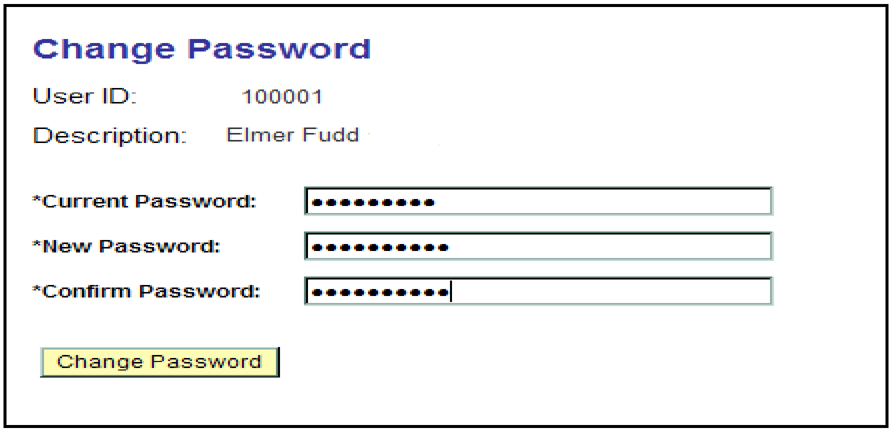
Enter User ID Number. In the Password field type the Temporary Password or:

Hint: Control V will paste the previously copied temporary password.

System Prompts: "**Your password has expired.**"

Click link: **Click here to change your password.**

Step 6



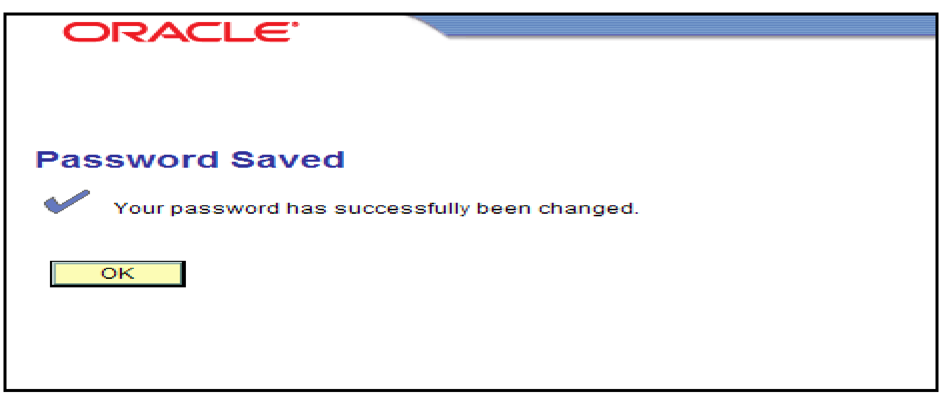
In the Current Password field, type the Temporary Password.
REMEMBER: Temporary Passwords are a mixture of numbers and CAPITAL letters.
HINT: Control V will paste the previously copied temporary password.

Enter New Password: The password **<u>must be eight (8) characters and include at least one (1) number, and cannot be a previously used password and characters can be upper and lower case</u>**.

Enter New Password in the Confirm Password field.

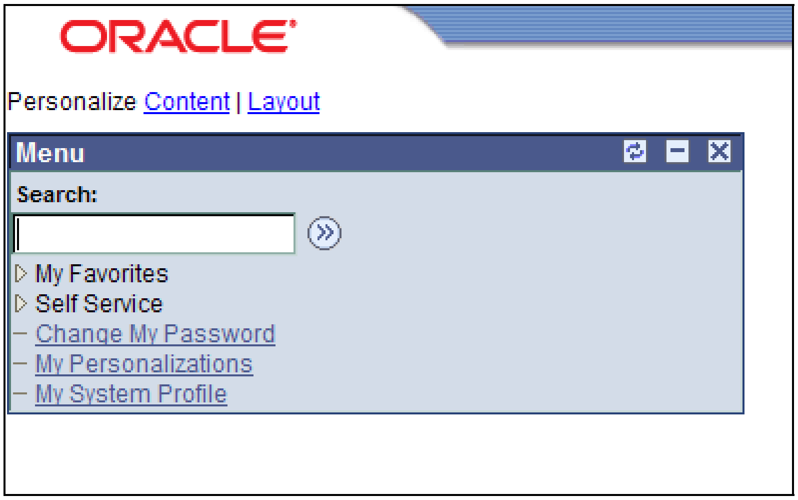
NOTE: The Confirm Password field must be entered exactly as the New Password field. If the password is entered incorrectly three (3) times, **ESS** will automatically lock out the user. If you stop before the third incorrect entry, you may still use the Forgot Your Password link to reset your password. To have your password reset due to lock out, call the Office of State Finance Help Desk Phone Numbers are 405 521-2444 or 866 521-2444 (Toll Free).

Click Change Password .



To save your new password, **click** OK .

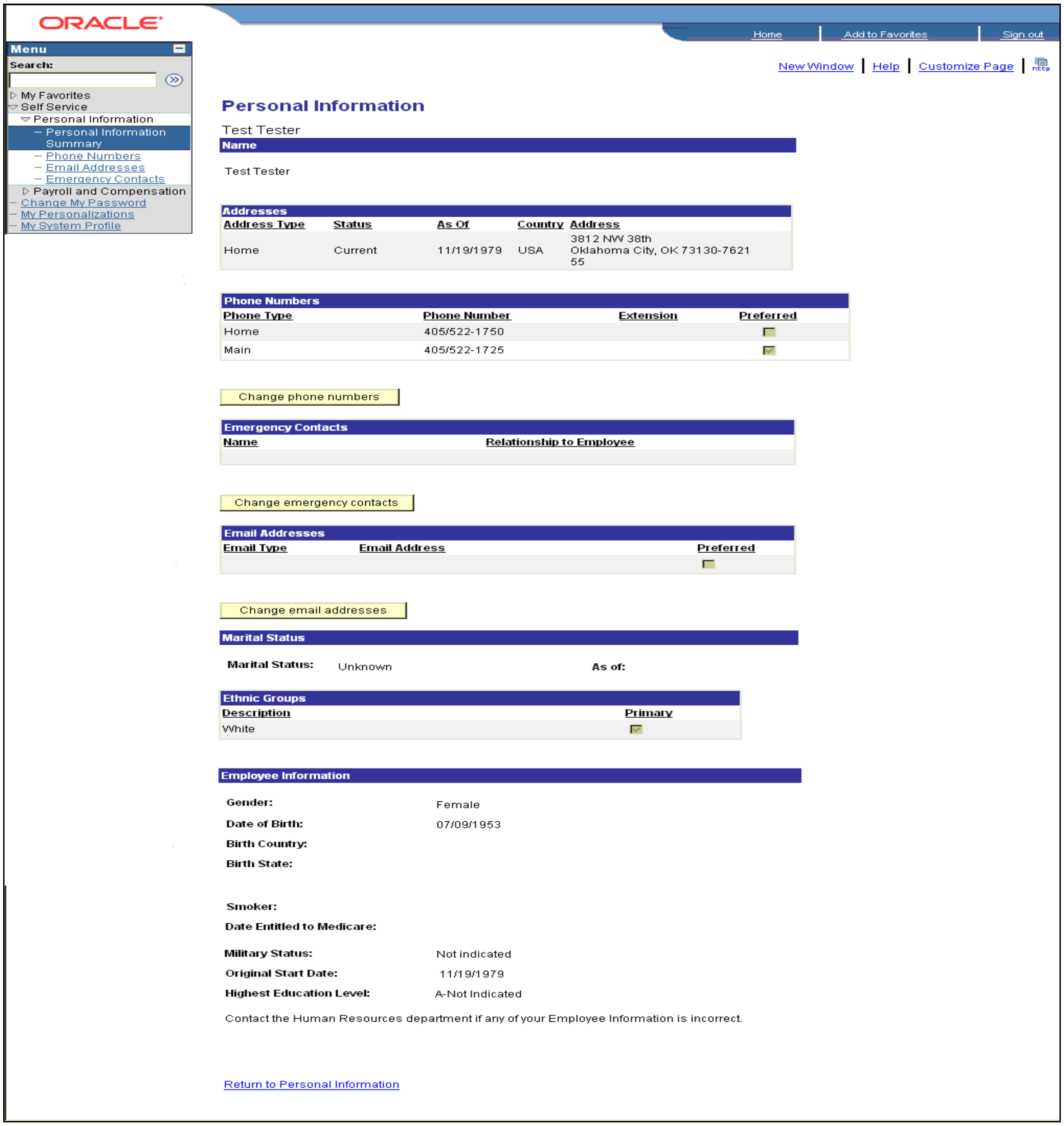
You have successfully reset your password and should be viewing the ESS Main menu page.



Personal Information Components

Navigation:* *Self Service > Personal Information > Personal Information Summary

The system displays the following:

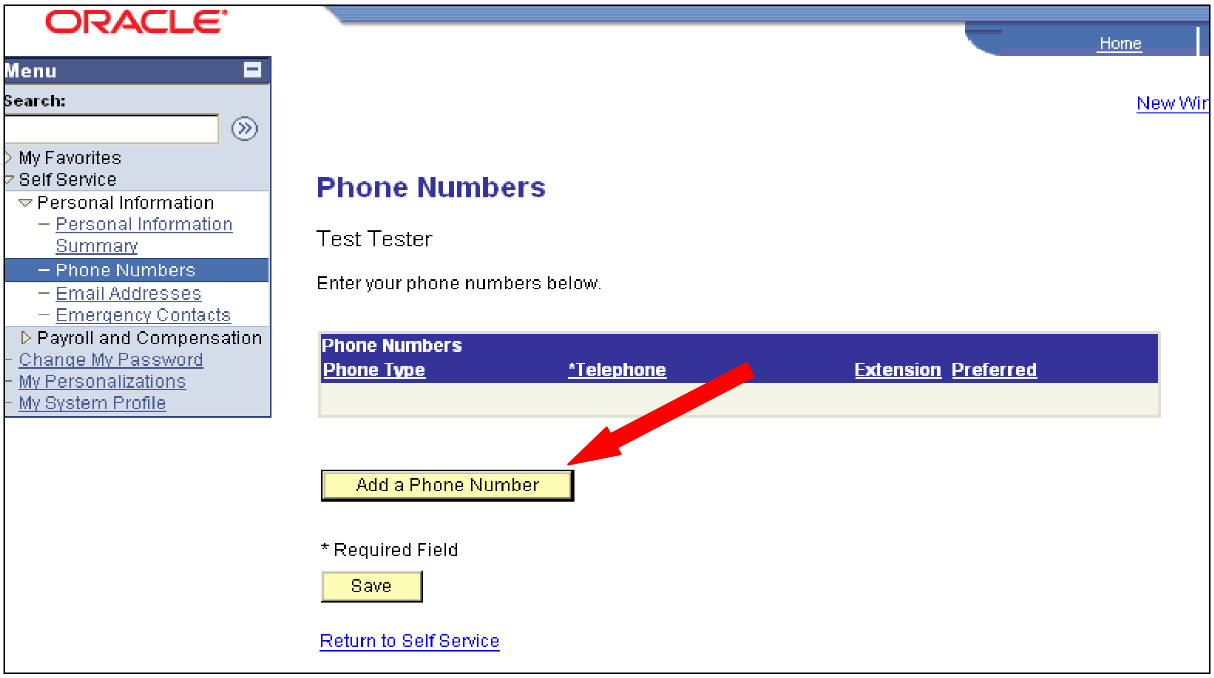


EXCEPTION: The employee will not be able to update any of the information on the Personal Information Page if your agency has chosen View Only. On the Personal Information Page, the employee will only be able to view their personal information. Contact your Agency's Human Resource Division if changes to the data are required.

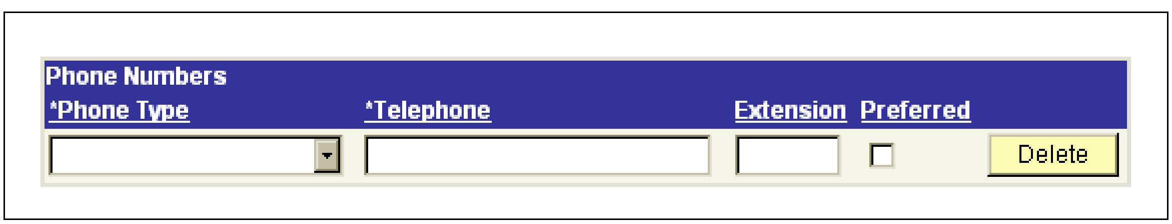
Personal Information Changes – Phone Number(s)

Navigation: Self Service > Personal Information > Phone Numbers

The system will display the following:



Click Add a Phone Number and the fields will become available.



Phone Numbers Phone Type – **Select** drop down menu and choose Phone Type.

Telephone – **Enter** phone number.

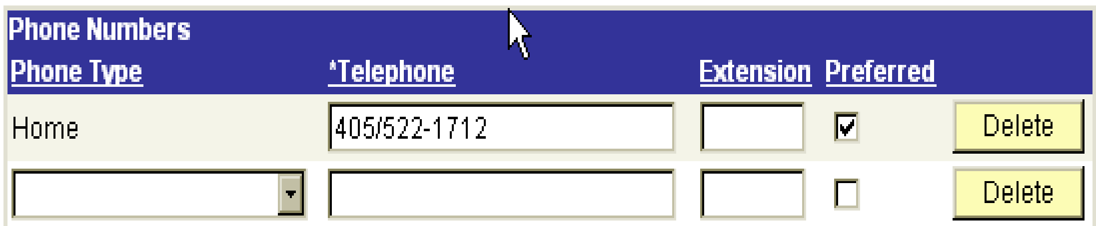
Extension – **Enter** Extension, (if part of phone number).

Preferred box – Select for the preferred phone number.

Click Save at the bottom of the page.

Add additional Phone Numbers

Click Add a Phone Number and a blank row will be added.



Phone Numbers Phone Type – **Select** and choose Phone Type.

Telephone – **Enter** phone number.

Extension – **Enter** Extension, (if part of phone number).

Preferred box – Only one box must be checked as preferred.

Click Save .

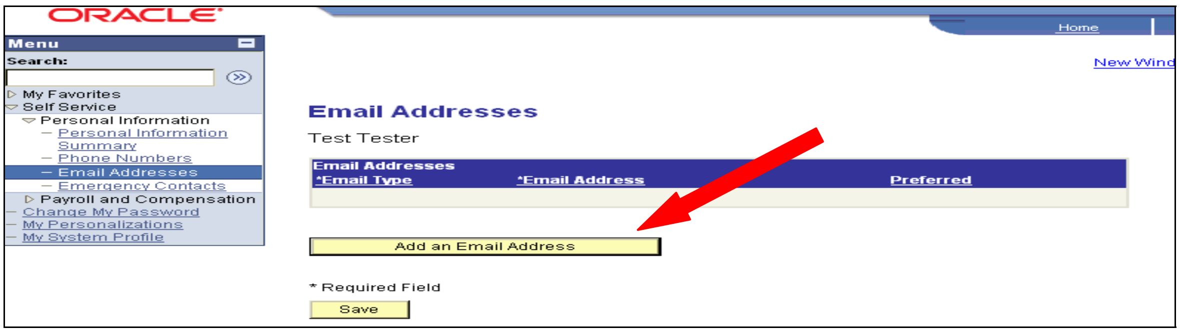
NOTE*:* To change/correct previously entered phone numbers, type over the exiting data or **click** Delete .

Click Save .

Personal Information Changes – Email Addresses

Navigation: Self Service > Personal Information > Email Addresses

The system will display the following:



Click Add an Email Address and the fields will become available.

Email Type – **Select** drop down menu and choose **Other** as the Email type.

Email Address – **Enter** agency Email address and **check** the preferred box. **Click** + to add another type of Email.   If more than one (1) type of Email is entered, <u>one (1) of the Emails **must** have the Preferred box checked</u>. If you do not have Email, **enter** your supervisor's agency Email address.

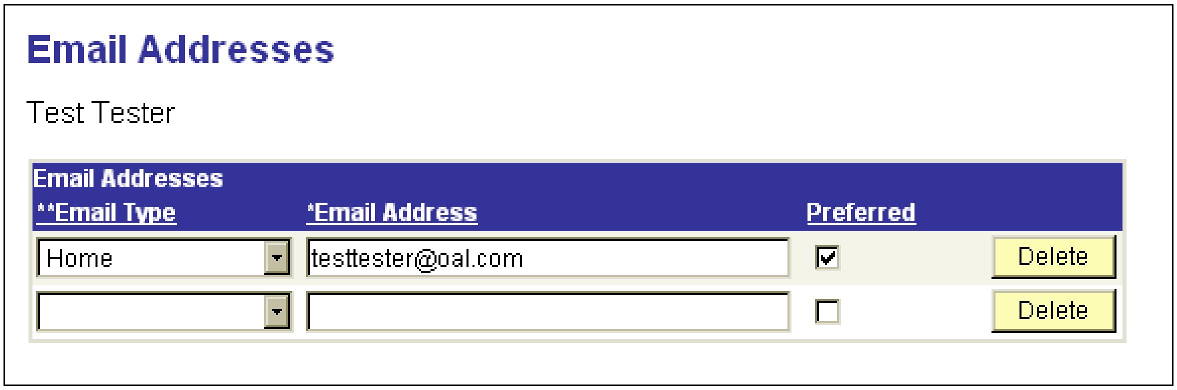
NOTE: The Emails on the General Profile Information Page and Personal Information Page provides separate functions within the various PeopleSoft modules. After the Email(s) have been entered on both pages, the system will provide employees with proper and timely notifications.

REMINDER: Update your Email(s) whenever there is a change.

Click Save .

Add Email address.

Click Add an Email Address and a row will be added.



Email Type – **Select** drop down menu and choose Email type.

Email Address – **Enter** Email address. One (1) of the Emails **must** have the Preferred box checked.

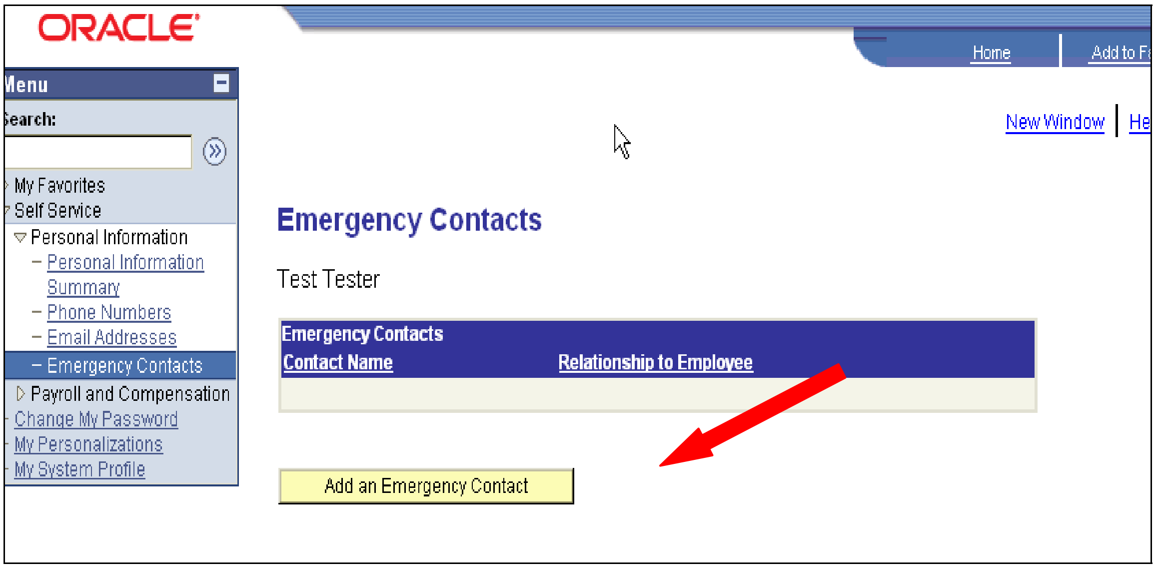
Click Save at the bottom of the page.

REMINDER: Update your Email(s) whenever there is a change.

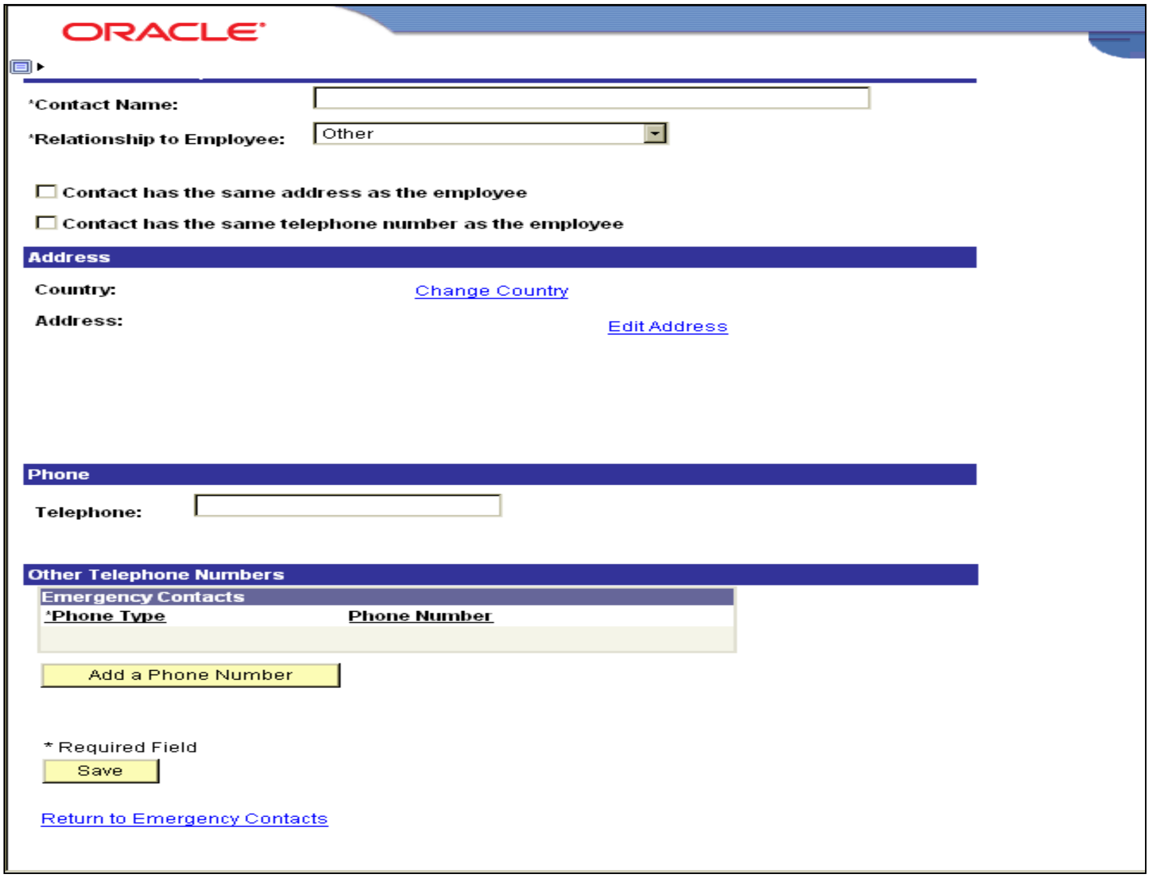
Personal Information Changes – Emergency Contact

Navigation: Self Service > Personal Information > Emergency Contact

The system will display the following:



Click Add an Emergency Contact and the fields will become available.



Contact Name – **Enter** the contact name

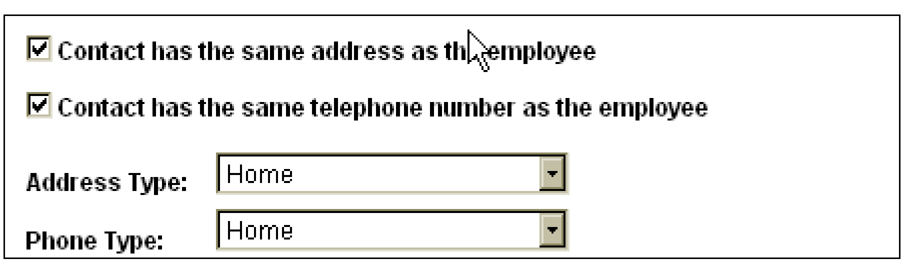
Relationship to Employee – **Select** the drop down menu and choose relationship.

If the address is the same as the employee check the box .

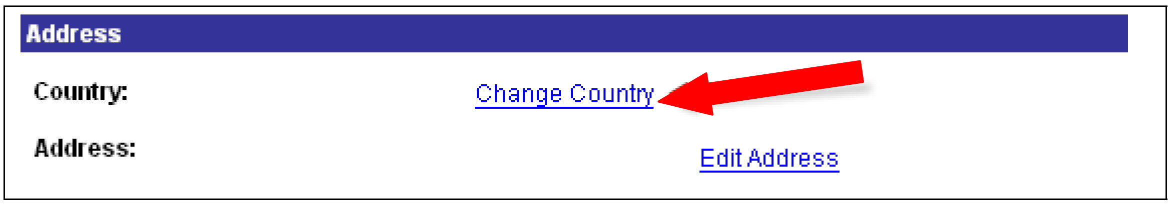
If the telephone number is the same as the employee check the box .

Select the drop down menu on the Address Type field and choose correct type.

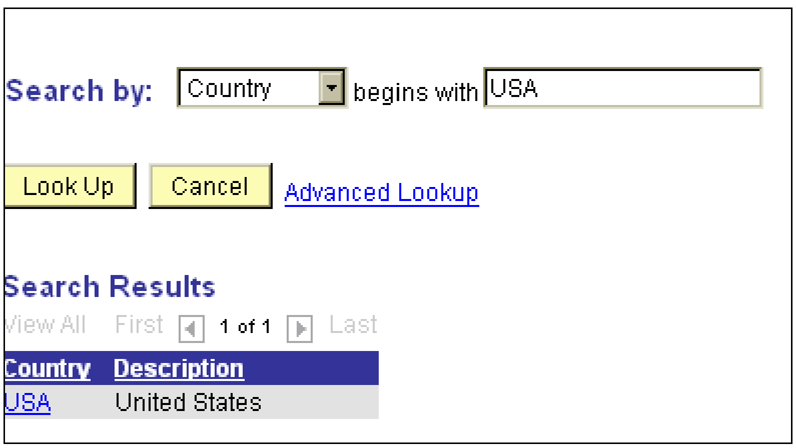
Select the drop down menu on the Phone Type field and choose correct type.



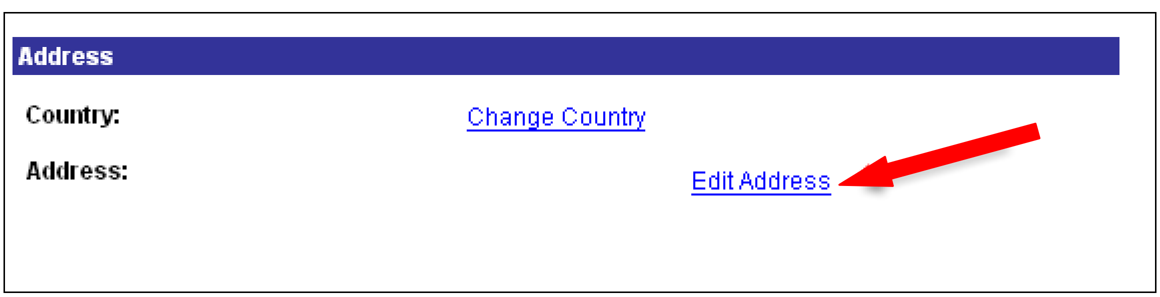
If the contact address is different than employee complete the following:



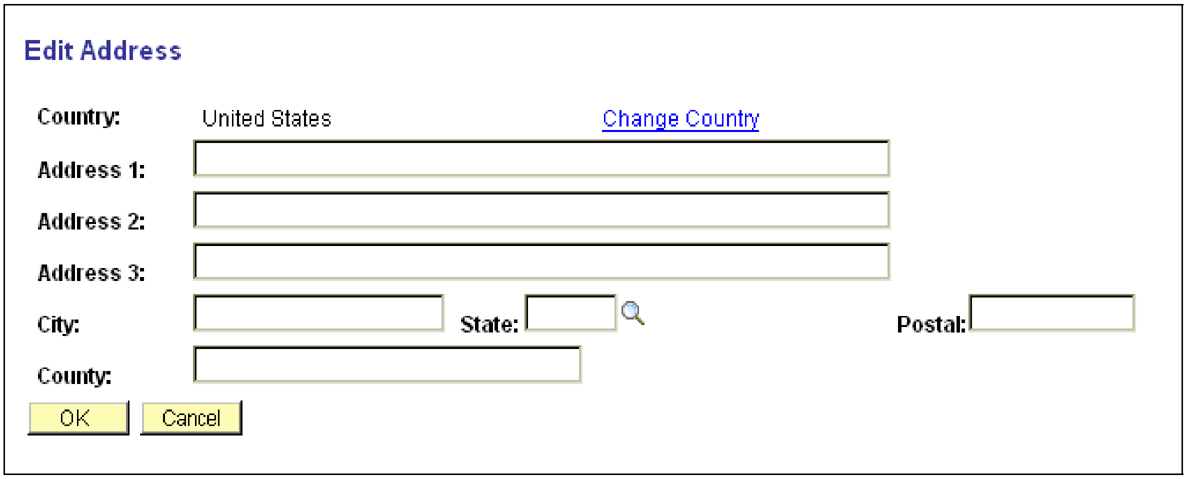
Click **Change Country** link.



Type “USA" and **select** **USA** link.

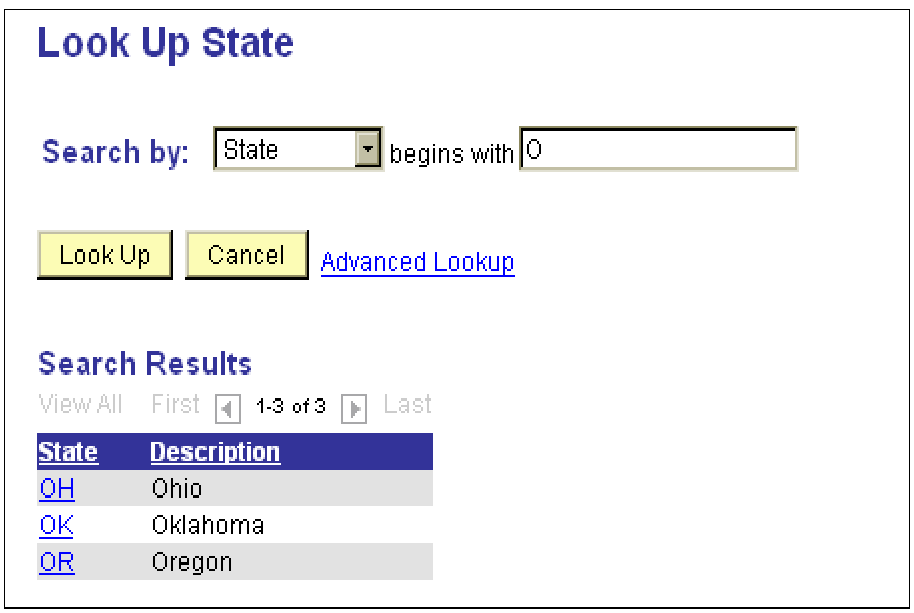


Click **Edit Address** link.



Address 1: – **Enter** address fields. Do not use punctuation in abbreviations (i.e.,St. or N.W. or Ave.) Use mixed case only, and do not use all caps.

State: - Enter OK for Oklahoma or **click** the magnifying glass for the "Lookup" menu (**enter** the first letter to narrow your search for the proper two (2) letter abbreviation. **Select** the proper state.

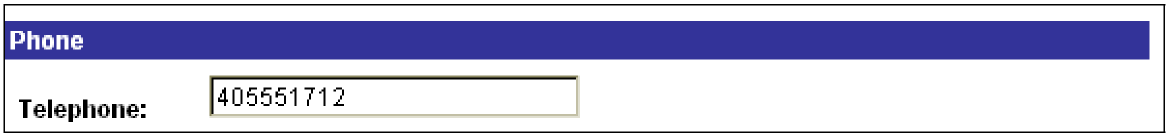


Postal – **Enter** the Zip Code

Click OK to return to previous page.

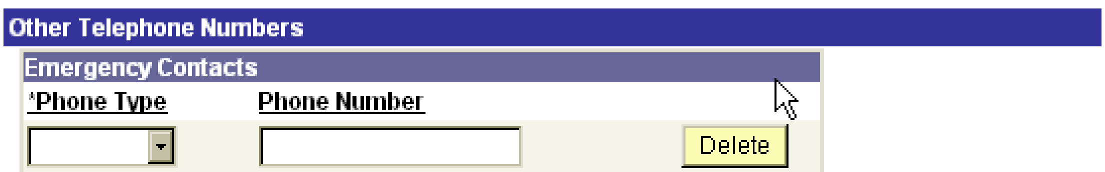
Click Save .

If the contact phone number is different than employee, complete the following steps:



To enter new information, enter the text in the blank field. To change existing information, type over the data and **click** Save .

To add other emergency contact phone numbers **select** Add a Phone Number and phone type and phone number will become available.



Phone Type – **Select** the drop down menu and **select** phone type.

Phone Number – **Enter** phone number.

Click Save .

NOTE: To change existing information, type over the data and **click** Save **.**

View Only Access

Navigation: Self Service > Payroll and Compensation

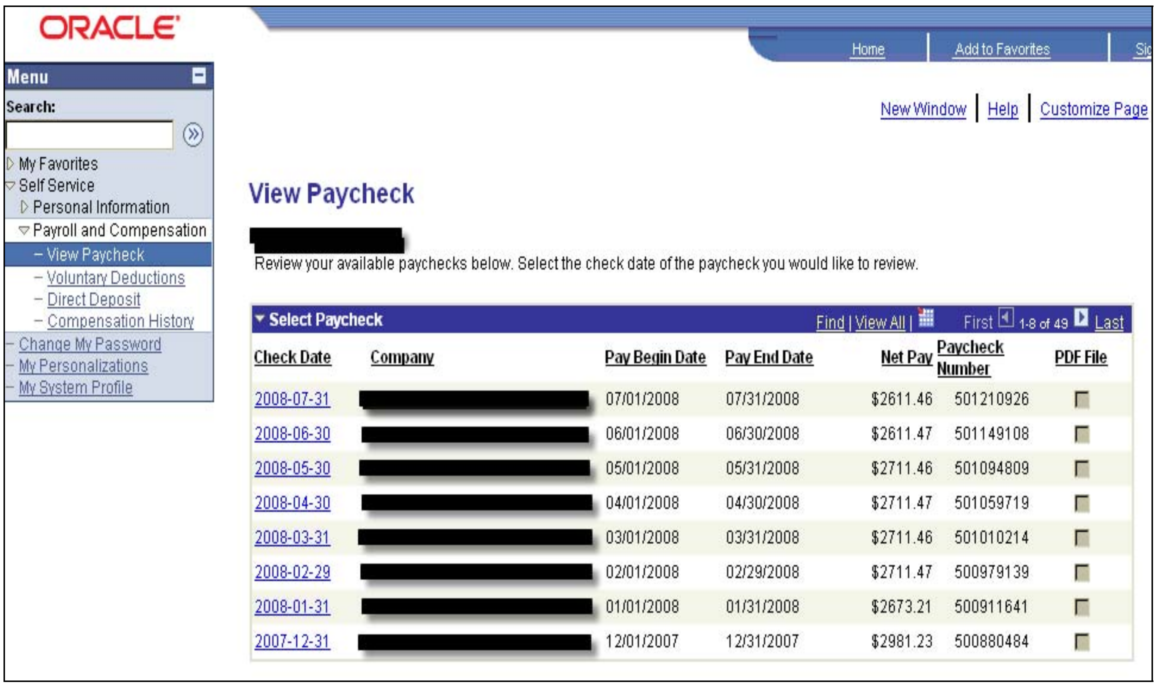
The system will display the following:

Select the information you want to view.

View Paycheck

Navigation: Self Service > Payroll and Compensation > View Paycheck

The system will display the following:


ORACLE

Home | Add to Favorites | Sig

Menu

Search:

- My Favorites
- Self Service
  - Personal Information
  - Payroll and Compensation
    - View Paycheck
    - Voluntary Deductions
    - Direct Deposit
    - Compensation History
- Change My Password
- My Personalizations
- My System Profile

New Window | Help | Customize Page

View Paycheck

[redacted]

Review your available paychecks below. Select the check date of the paycheck you would like to review.

Select Paycheck — Find | View All | First 1-8 of 49 Last

Check Date	Company	Pay Begin Date	Pay End Date	Net Pay	Paycheck Number	PDF File
2008-07-31	[redacted]	07/01/2008	07/31/2008	$2611.46	501210926	
2008-06-30	[redacted]	06/01/2008	06/30/2008	$2611.47	501149108	
2008-05-30	[redacted]	05/01/2008	05/31/2008	$2711.46	501094809	
2008-04-30	[redacted]	04/01/2008	04/30/2008	$2711.47	501059719	
2008-03-31	[redacted]	03/01/2008	03/31/2008	$2711.46	501010214	
2008-02-29	[redacted]	02/01/2008	02/29/2008	$2711.47	500979139	
2008-01-31	[redacted]	01/01/2008	01/31/2008	$2673.21	500911641	
2007-12-31	[redacted]	12/01/2007	12/31/2007	$2981.23	500880484	

Select the check date you want to review. **Click** **blue Check Date** link. The most current paycheck date will provide the year-to-date totals and leave balances even if the net pay is zero. After selecting the check link, you can print the advice page.

A zero net pay check is due to sick and/or annual leave time reported after the regular payroll has processed. An additional payroll is processed to update leave balances resulting in zero net pay.

The following screen prints break down each section of the paycheck.

General

View Paycheck

Test Tester

Company:		Net Pay:	$2,611.46
[redacted]		Pay Begin Date:	07/01/2008
Address:		Pay End Date:	07/31/2008
[redacted]		Check Date:	07/31/2008

Review the details of your paycheck. To view other checks, select View a Different Paycheck

General

Name:	[redacted]	Business Unit:	[redacted]	
Employee ID:	[redacted]	Pay Group:	[redacted]	
Address:	[redacted]	Department:	[redacted]	
		Location:	[redacted]	
		Job Title:	[redacted]	
		Pay Rate:	$4,099.02	Monthly

Tax Data

Tax Data

Fed Marital Status:	Married	OK Marital Status:	Married, use regular table
Fed Allowances:	0	OK Allowances:	0
Fed Addl Percent:	0.000	OK Addl Percent:	0.000
Fed Addl Amount:	$100.00	OK Addl Amount:	$0.00

Paycheck Summary

Paycheck Summary					
Period	Gross Earnings	Fed Taxable Gross	Total Taxes	Total Deductions	Net Pay
Current	5,206.92	3,698.79	931.53	1,663.93	2,611.46
YTD	36,448.44	25,791.53	5,958.93	11,747.51	18,742.00

Earnings and Taxes

Earnings

Description	Hours	Rate	Amount	YTD Amount
Regular			4,099.03	27,747.27
Ben Allow			964.66	6,752.62
Hol Slry	8.00	23.648243	189.19	945.94
RBenAllow			143.23	1,002.61
Regular	-8.00	23.648243	-189.19	0.00
Total:			5,206.92	36,448.44

Taxes

Description	Amount	YTD Amount
Fed Withholdng	490.03	2,871.46
Fed MED/EE	57.53	402.68
Fed OASDI/EE	245.97	1,721.79
OK Withholdng	138.00	963.00
Total:	931.53	5,958.93

REMINDER: The most current paycheck date will give you year-to-date totals and leave balances even if the net pay is zero.

Before Tax Deductions, After Tax Deductions and Employer Paid Benefits

Before-Tax Deductions			After Tax Deductions			Employer Paid Benefits		
Description	Amount	YTD Amount	Description	Amount	YTD Amount	Description	Amount	YTD Amount
Medical Re	275.00	1,925.00	EE Supplem	31.50	220.50	Defr Comp	25.00	175.00
EEPacifiCa	377.57	2,642.99	DP Depende	7.20	50.40	OPERS Ret	594.36	3,914.58
DPPacifiCa	539.81	3,778.67	NTL TEACHE	117.10	819.70	SoonerSave	1.75	11.65
Delta PPO	28.44	199.08						
EE Disabil	7.54	52.78						
EE Basic L	3.90	27.30						
EESuppleme	7.40	51.80						
SoonerSave	125.00	975.00						
OPERS	143.47	1,004.29						
						* Taxable		
Total:	**1,508.13**	**10,656.91**	**Total:**	**155.80**	**1,090.60**	**Total:**	**621.11**	**4,101.23**

Net Pay Distribution

Net Pay Distribution				
Payment Type	Paycheck Number	Account Type	Account Number	Amount
Direct Deposit	501210926	Checking	XXXXXX5571	2,611.46

Leave Balances

Leave Balances	
Description	**YTD Amount**
Sick	1321.97
Vacation	541.55
Total YTD Amount:	**1863.52**

Leave Balances reflect the hours available.

NOTE: Leave Balances are only available to agencies utilizing the PeopleSoft Leave System.

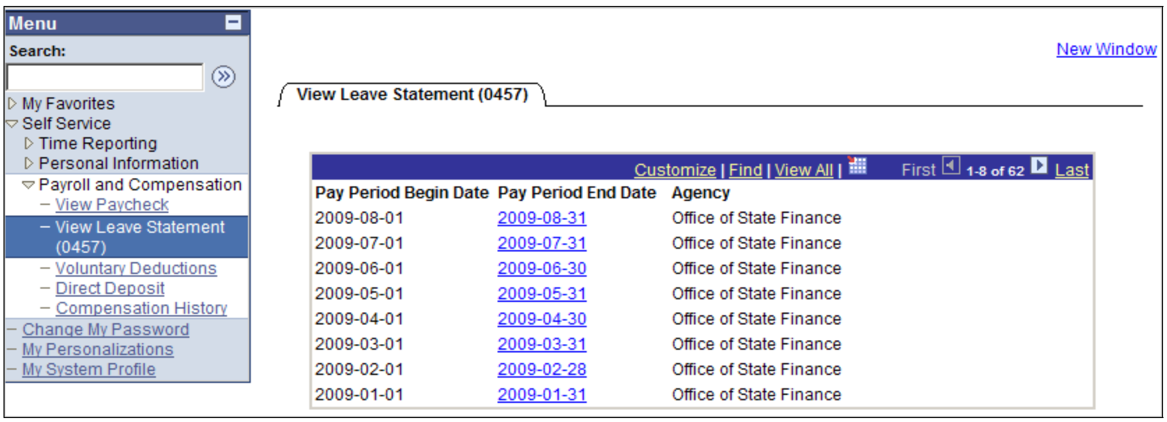
View Leave Statement

Leave Accrual Report

Step I – Navigate to the Payroll and Compensation Components

Navigation: Self Service > Payroll and Compensation > View Leave Statement (0457)

The system will display a list of Pay Periods with Leave Statement Reports available for viewing and printing:



Step 2 – **Click** Pay Period End Date link you wish to view the Leave Accrual Statement. The Leave Accrual Statement will appear in a separate window. Print statement as needed.

State of Oklahoma
Office of State Finance
Agency 090
Employee Monthly Leave Accrual Report
for August 2009

Date Printed: 01/27/2010
Time Printed: 10:08:AM
Page Number: 1

Mail Drop ID:

EmplID: 123456 Name: Smith,John

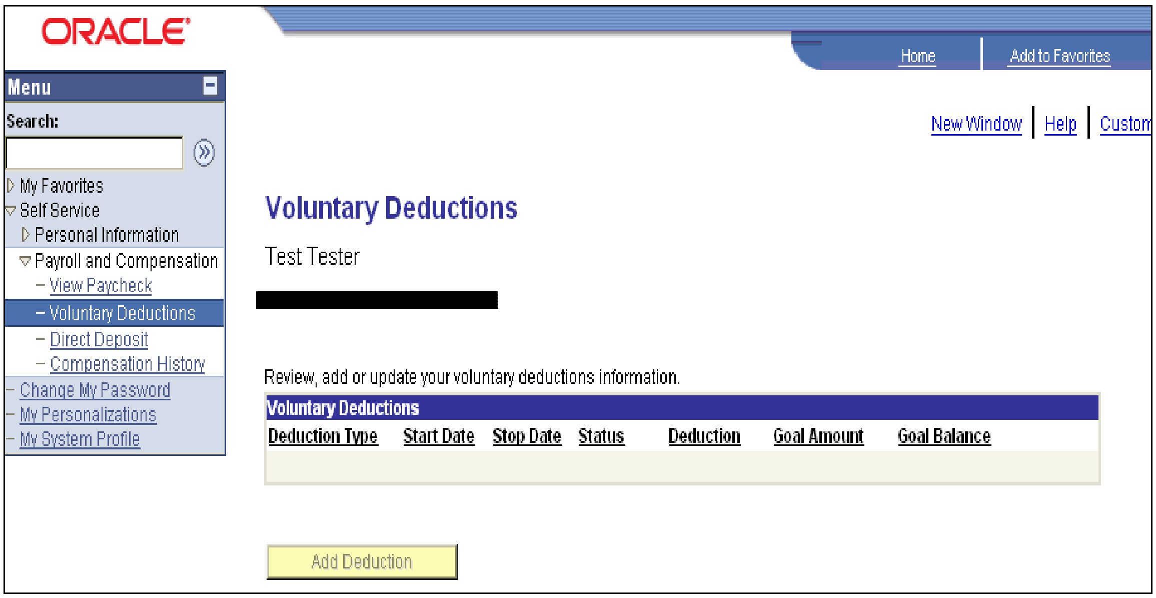
DAY	WEEKDAY	ANNUAL	SICK	ENFRC LIMIT	COMP TIME	HOLID/ PERSON	ORG. LIMIT	MILIT W/PAY	SHARE	NATL GUARD
BEGIN BAL		212.873328	153.123328	15.500000	152.000000	0.000000	0.000000	0.000000	0.000000	0.000000
08/10	Mon	0.000000	0.000000	0.000000	8.000000	0.000000	0.000000	0.000000	0.000000	0.000000
08/11	Tues	0.000000	0.000000	0.000000	8.000000	0.000000	0.000000	0.000000	0.000000	0.000000
08/12	Wed	0.000000	0.000000	0.000000	8.000000	0.000000	0.000000	0.000000	0.000000	0.000000
08/13	Thur	0.000000	0.000000	0.000000	8.000000	0.000000	0.000000	0.000000	0.000000	0.000000
08/14	Fri	0.000000	0.000000	0.000000	8.000000	0.000000	0.000000	0.000000	0.000000	0.000000
08/27	Thur	0.000000	0.000000	0.000000	2.000000	0.000000	0.000000	0.000000	0.000000	0.000000
TOTAL USED		0.000000	0.000000	0.000000	42.000000	0.000000	0.000000	0.000000	0.000000	0.000000
LOST		0.000000								
ACCRUED		9.655128	9.655128		14.250000	0.000000				
EXPIRED					1.500000					
ADJUSTED		0.000000	0.000000	0.000000	0.000000	0.000000	0.000000	0.000000	0.000000	0.000000
TRANSFERRED		0.000000	0.000000				RECEIVED SHARE		0.000000	
RECEIVED		0.000000	0.000000				RETURNED SHARE		0.000000	
END BAL		222.528456	162.778456		122.750000	0.000000			0.000000	
YTD USED		0.000000	31.750000	15.500000	56.000000	0.000000	0.000000	0.000000	0.000000	0.000000

***Note:** For information regarding the annual leave maximum refer to Merit Rule 530:10-15-11(b)(5).

Voluntary Deductions

Navigation: Self Service > Payroll and Compensation > Voluntary Deductions

The system will display the following:

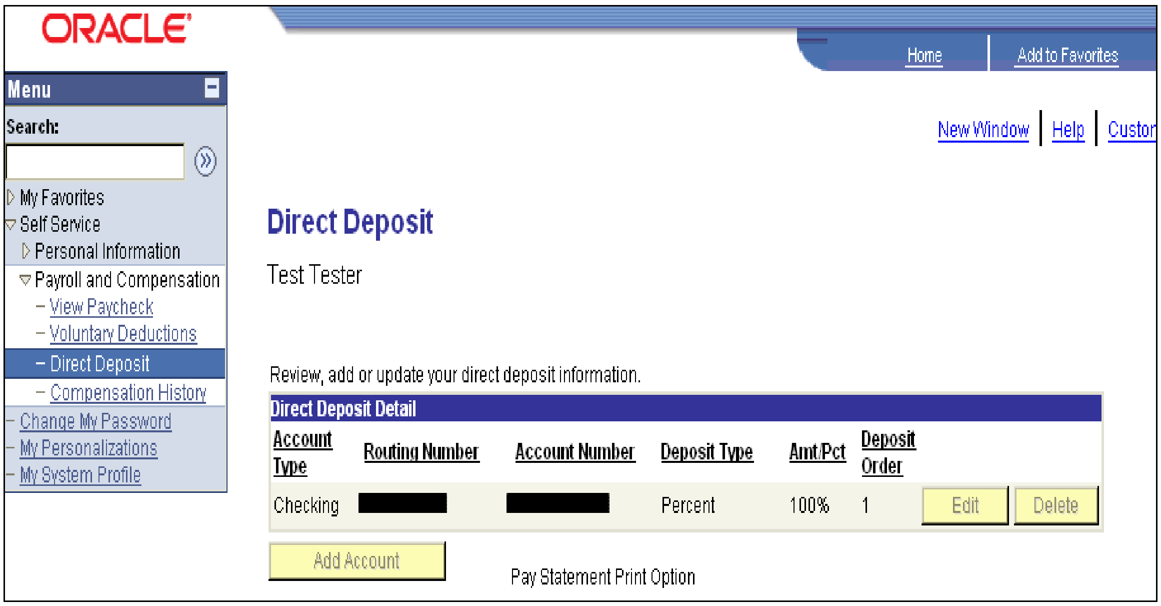


NOTE: Be patient, the voluntary deductions can take time to load.

Direct Deposit

Navigation: Self Service > Payroll and Compensation > Direct Deposit

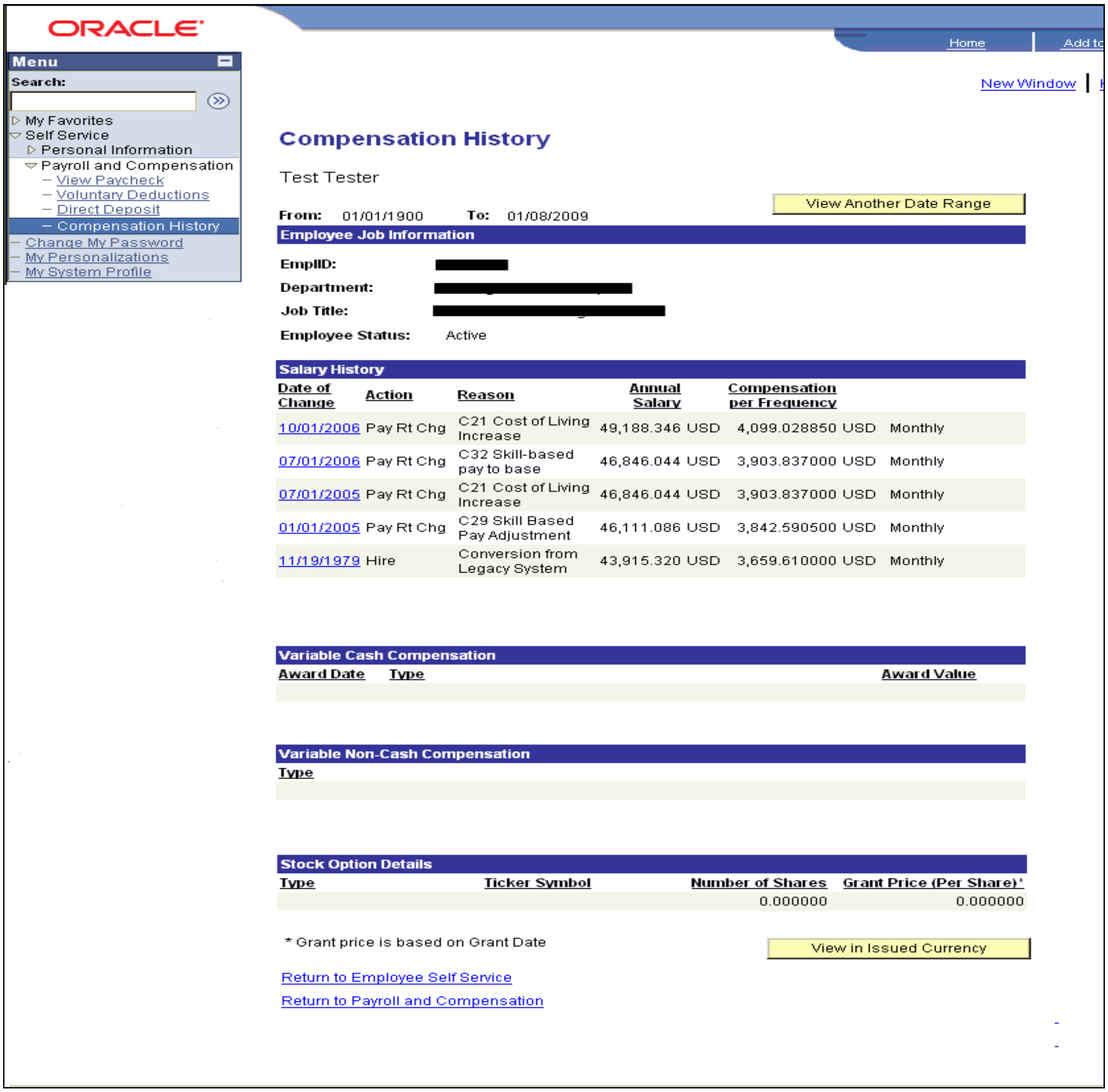
The system will display the following:



NOTE: This is a view only page and the Edit, Delete and Add Account buttons have been grayed out.

Compensation History

The system will display the following:



Click Date of Change **blue link** to view additional information.
Click **Return to Employee Self Service** link.
Click **Return to Payroll and Compensation** link.