PeopleSoft
Employee Self Service

Employee Guide to PeopleSoft

V1.4 May 2024

Endeavour Foundation

Contents

PeopleSoft: Employee Self Service

PeopleSoft is a user-friendly system that's easy to navigate and is mobile-responsive (ensure 'allow pop-ups' is enabled). Submit or approve leave and timesheets (if applicable), update your banking details, or even change your name… all from anywhere, at any time using any device. No Citrix needed!

In this guide we focus on the ***Employee Self Service (ESS)*** dashboard – our standard home page all about you as an employee. Report time, review Payroll information, view and manage absences, and update other relevant information here. If you are also a people leader, this guide should be utilised in conjunction with ***PeopleSoft: Manager Self Service (MSS).***

Accessing PeopleSoft

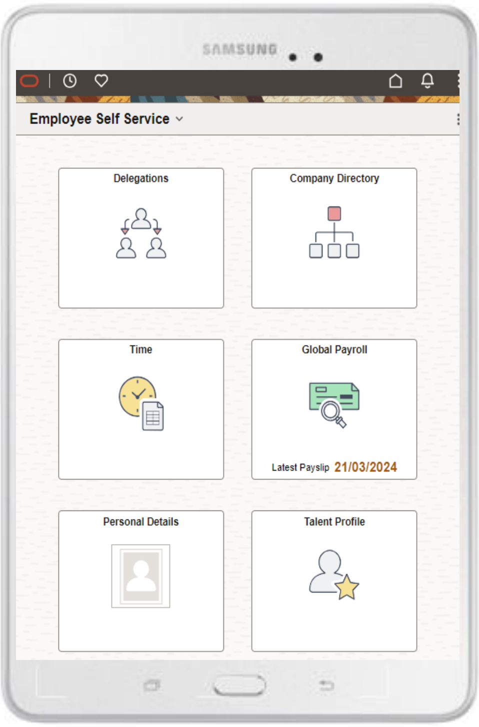
You can access PeopleSoft via the Staff Intranet or directly via https://efhris.com.au.

Peoplesoft is Multi-Factor Authentication (MFA) enabled making your employment data more secure.

1. Access Peoplesoft outside Trusted Network using MFA:
If you are wanting to access Peoplesoft from a device outside of the Trusted Network, you will still log in using your username and password, but you will also be prompted to complete MFA.

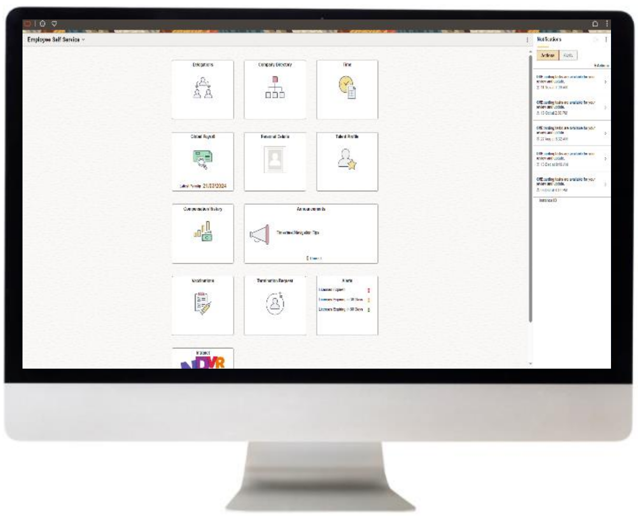
2. Access Peoplesoft within the Trusted Network:
When you are logged into a device on the Trusted Network it will be much faster and easier to access Peoplesoft. You will already be signed in to the device and MFA will be working in the background. You simply open Peoplesoft, with seamless access via single sign on (SSO).

Once successfully logged in you will see the home screen below as shown on a mobile device.



PeopleSoft is responsive so the screen size will adjust to your device.

You can also rearrange the tiles by simply dragging them to your desired location.



The following sections will go through the features and detailed steps to view information or complete activities in PeopleSoft.

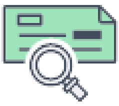
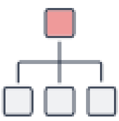
Need help?

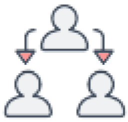
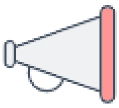
Submit a request via the [#TeamPossible Support Hub]

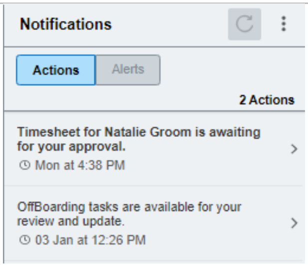
(07) 3900 5460

Your homepage at a glance

Listed below are the PeopleSoft buttons available to you and what you can do in *Employee Self Service*. Refer to the following pages for specific instructions along with tips about features you may not be aware of!

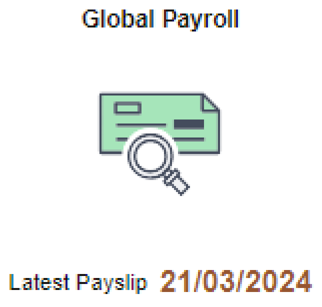
Global Payroll 	**Global Payroll** View your pay slips, payment summaries, update your banking details and create pay distributions.
Time 	**Time** There is where you enter your timesheet, leave requests and review leave balances. You can also forecast your leave balance by selecting a date in the future.
Personal Details	**Personal Details** Update your home and mailing address, contact information, emergency contacts, add a profile photo and even change your name (with sighted official supporting documentation).
Vaccinations 	**Vaccinations** Employees can see submit vaccination information via this handy self-service tile.
Company Directory 	**Company Directory** Providing an up-to-date organisational chart where you can search for employees by name, role, or location. Save staff as favourites, view their peers, direct reports, and even dotted line reporting!

Delegations 	**Delegations** View transactions that have been delegated to you.
Talent Profile 	**Talent Profile** View your licences and certifications such Blue Card, NDIS Worker Screening Check, and National Police Check. Update your Drivers or Forklift Licence. Enter your education such as areas of study, degrees, or languages you speak.
Compensation History 	**Compensation History** Employees may directly access their compensation history, including detailed information about historical changes in pay.
Termination Request 	**Termination Request** Leaving the organisation? Submit your termination here to commence the formal offboarding process.
Announcements 	**Announcements** Make sure to review this tile to see important announcements such as timesheets deadlines that you need to be aware of.
Alerts Licenses Expired 0 Licenses Expiring in 30 Days 0 Licenses Expiring in 60 Days 0	**Alerts** There is where you'll be notified about upcoming expiring licenses or certifications you uploaded to PeopleSoft.
Intranet Endeavour Foundation	**Intranet** Quickly access the Staff Intranet via this tile.

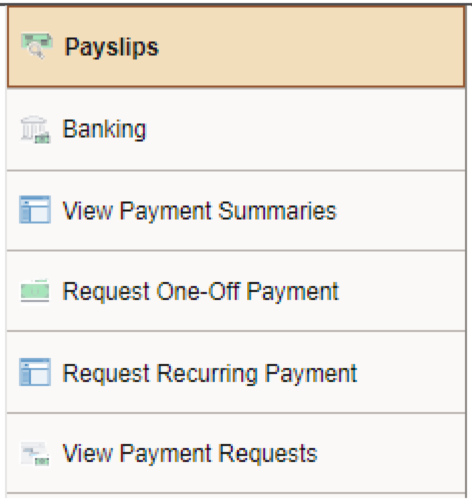
	**Notifications** The notifications panel displays outstanding **Actions** as well as any **Alerts** requiring your attention.

Global Payroll

<table>
<tr>
<td>Click on Global Payroll

Here you can view payslips and annual PAYG summaries as well as update you bank details.</td>
<td>
</td>
</tr>
</table>

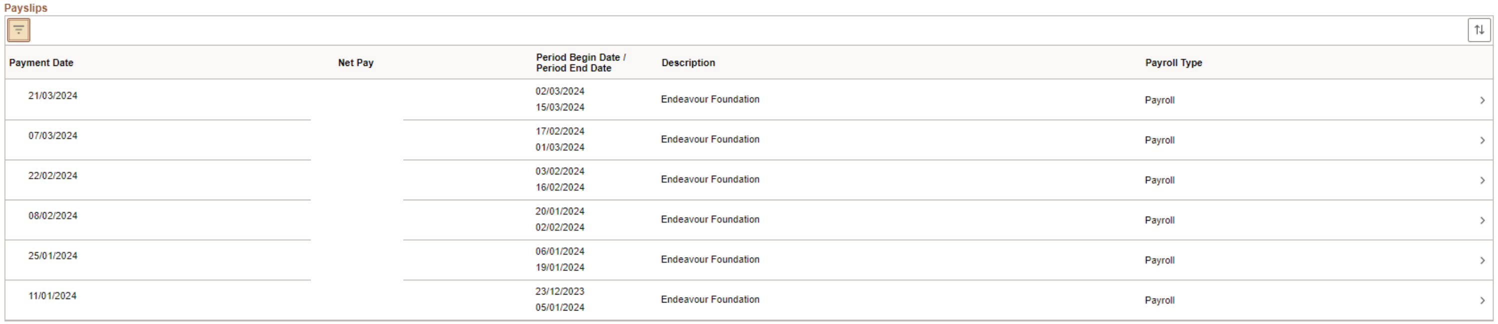
Payslips

<table>
<tr>
<td>Select Payslips</td>
<td>
</td>
</tr>
</table>

Click on the ➤ arrow to open your payslip

Note: If you can't open your pay slip you may have a pop-up blocker on your computer. It's very easy to change this setting.

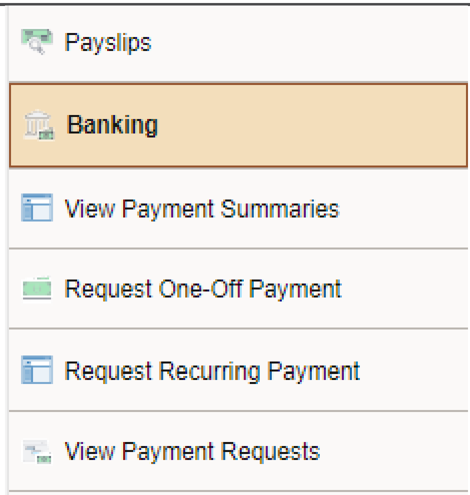
Search for 'turn off pop-up blockers in… <Chrome, Internet Explorer, Safari>'

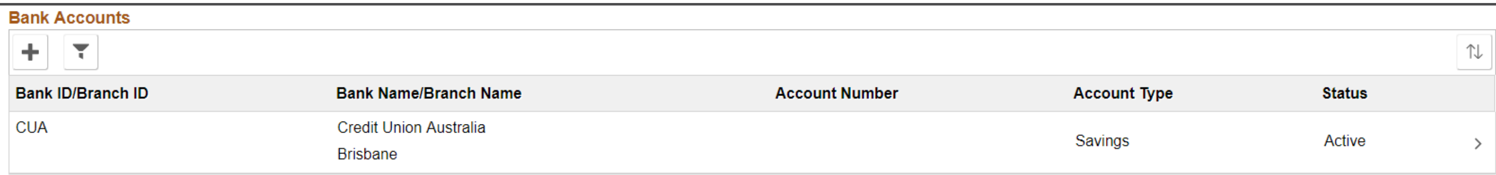


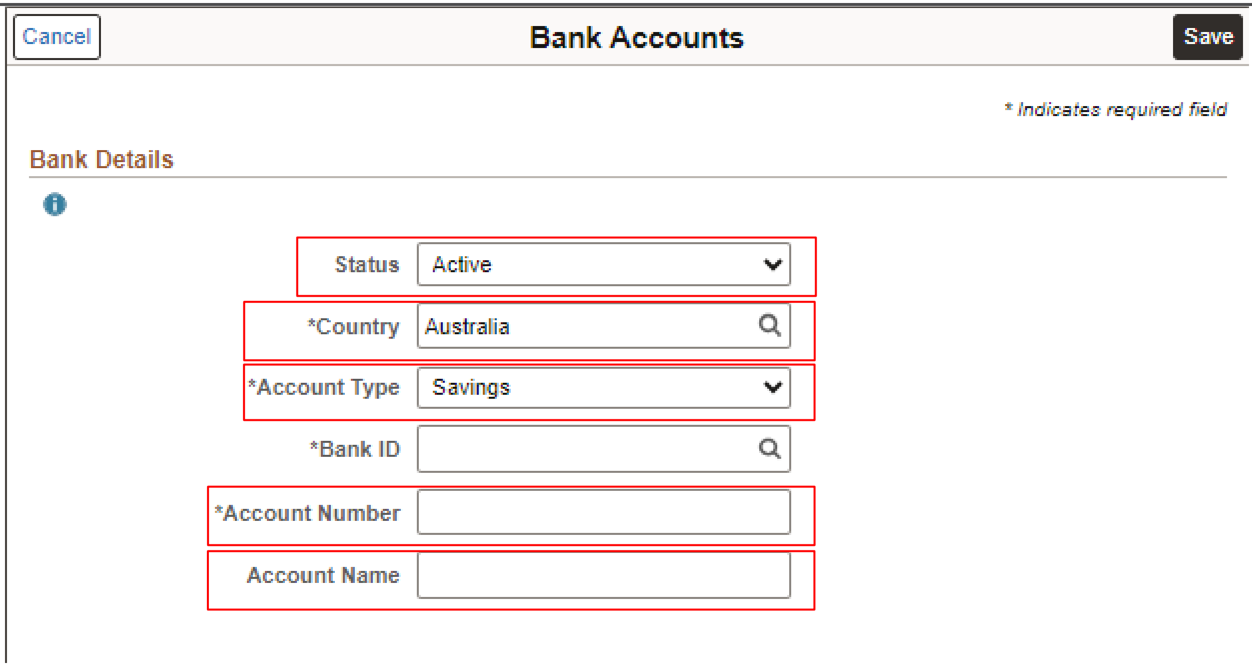
Payslips

Payment Date	Net Pay	Period Begin Date / Period End Date	Description	Payroll Type	
21/03/2024		02/03/2024 15/03/2024	Endeavour Foundation	Payroll	›
07/03/2024		17/02/2024 01/03/2024	Endeavour Foundation	Payroll	›
22/02/2024		03/02/2024 16/02/2024	Endeavour Foundation	Payroll	›
08/02/2024		20/01/2024 02/02/2024	Endeavour Foundation	Payroll	›
25/01/2024		06/01/2024 19/01/2024	Endeavour Foundation	Payroll	›
11/01/2024		23/12/2023 05/01/2024	Endeavour Foundation	Payroll	›

Banking

<table>
<tr>
<td>Via Global Payroll, select Banking.</td>
<td>
</td>
</tr>
<tr>
<td>You can add (+), edit or remove your Bank Account details here.

The following fields are mandatory:
Country
Account Type
Bank ID
Bank Branch ID (BSB)
Account Number
Currency Code
Ensure you select Save once complete to confirm any changes.</td>
<td>
</td>
</tr>
</table>

Note: You can't remove accounts that have an active distribution attached to them.	

Payment Distribution can also be set up here.

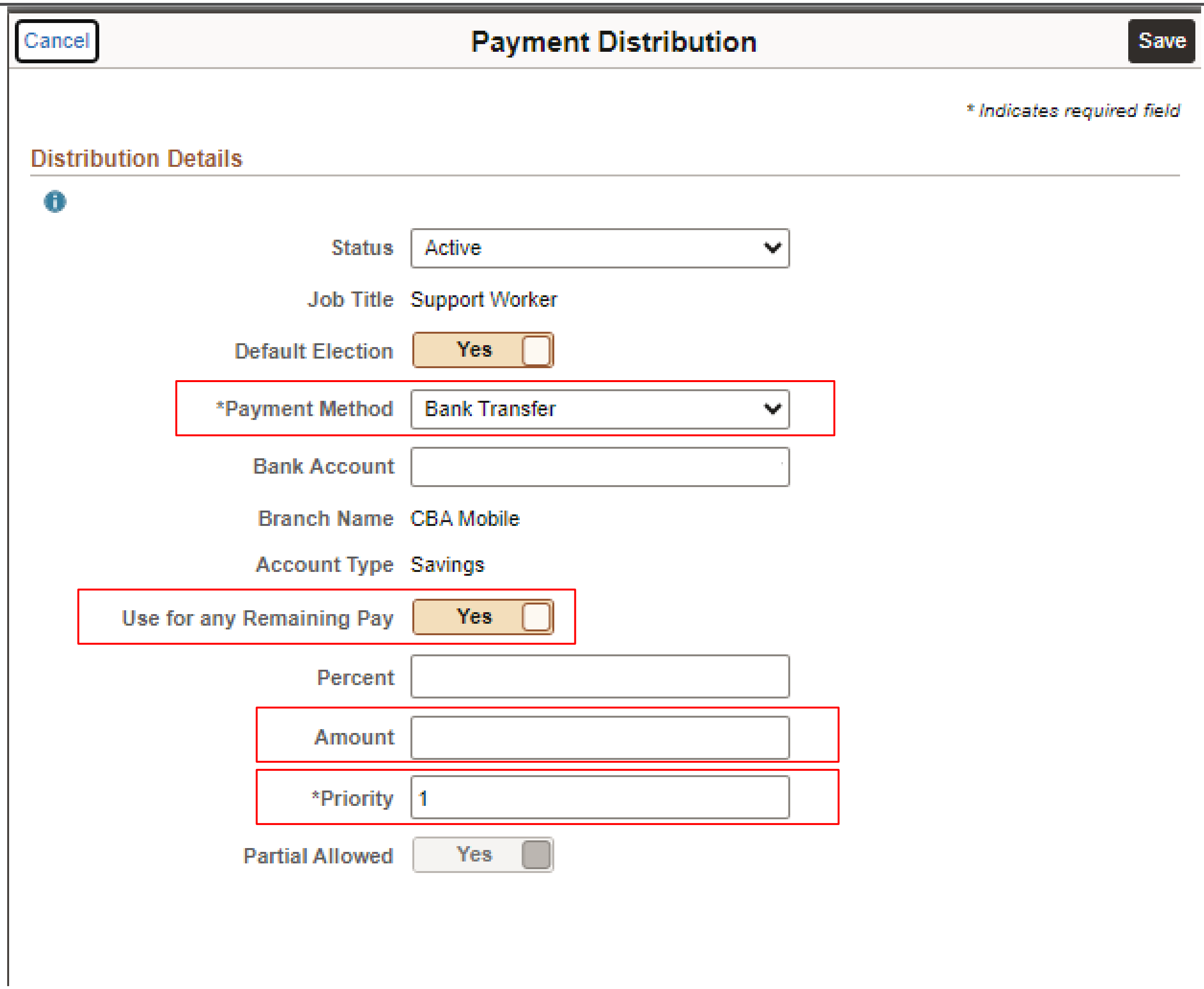
This is where you can nominate your fortnightly salary to go to different accounts such as to pay a loan or add to a savings account, for example.

What you need to know:

- Always select **'Bank Transfer'**
- At least one distribution must select **Yes** for 'Use for any Remaining Pay'
- **Amount** - you must select an amount or percent (one or the other)

Select a priority 1, 2, 3 etc. (e.g. your mortgage might be priority 1, while adding to your travel fund might be a Priority 3.

Ensure you select *Save* once complete to confirm any changes.



View Payment Summaries

Click on *View Payment Summaries* to see your earnings for previous financial years up to and including Tax Year 2019.

Note: due to the introduction of Single Touch Payroll (STP) by the ATO, payment summaries are now exclusively available via myGov from 2020 onwards.

View Payment Summaries

Select Payment Summary

Tax Year	Pay Entity	Start Date	End Date	ETP/PSM	YTD/ETP Gross	YTD/ETP Tax	PSM Status
2019	Endeavour Foundation	27/08/2018	30/06/2019	PAYG Payment Summary			Original
2019	Endeavour Foundation	20/06/2019	20/06/2019	PAYG Payment Summary			Original
2018	Endeavour Foundation	01/07/2017	28/06/2018	PAYG Payment Summary			Original
2017	Endeavour Foundation	01/07/2016	30/06/2017	PAYG Payment Summary			Original
2016	Endeavour Foundation	01/07/2015	30/06/2016	PAYG Payment Summary			Amended
2015	Endeavour Foundation	01/07/2014	30/06/2015	PAYG Payment Summary			Original
2014	Endeavour Foundation	14/10/2013	30/06/2014	PAYG Payment Summary			Original
2014	Endeavour Foundation	01/07/2013	19/07/2013	PAYG Payment Summary			Original

Request One-Off Payment

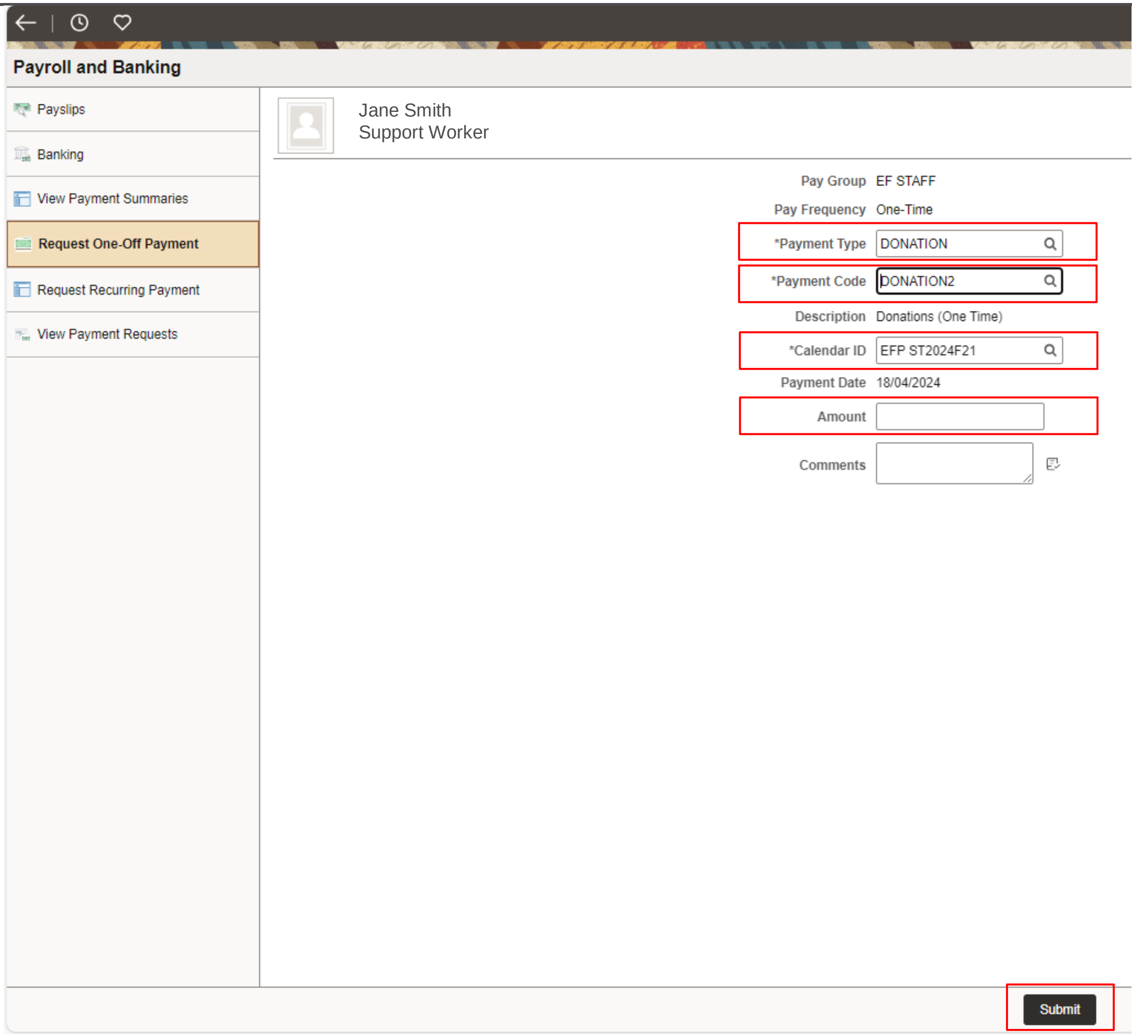
Request One-Off Payment can be utilised if you wish to make a one off deduction for the following purposes:

- **Donation** - to Endeavour Foundation
- **Donation Pre Tax** - to Endeavour Foundation
- **Super** – Pre Tax (Amount or Percent) or Post Tax (Amount of Percent)

To set up your one-off payment:

1. Select *Payment Type*
2. Select *Payment Code*
3. Select *Calendar ID* – the applicable pay date will display for each option
4. Enter the *Amount*
5. Add any Comments
6. Select *Submit*

The next screen should display the **Workflow Status = Approved.**



Request Recurring Payment

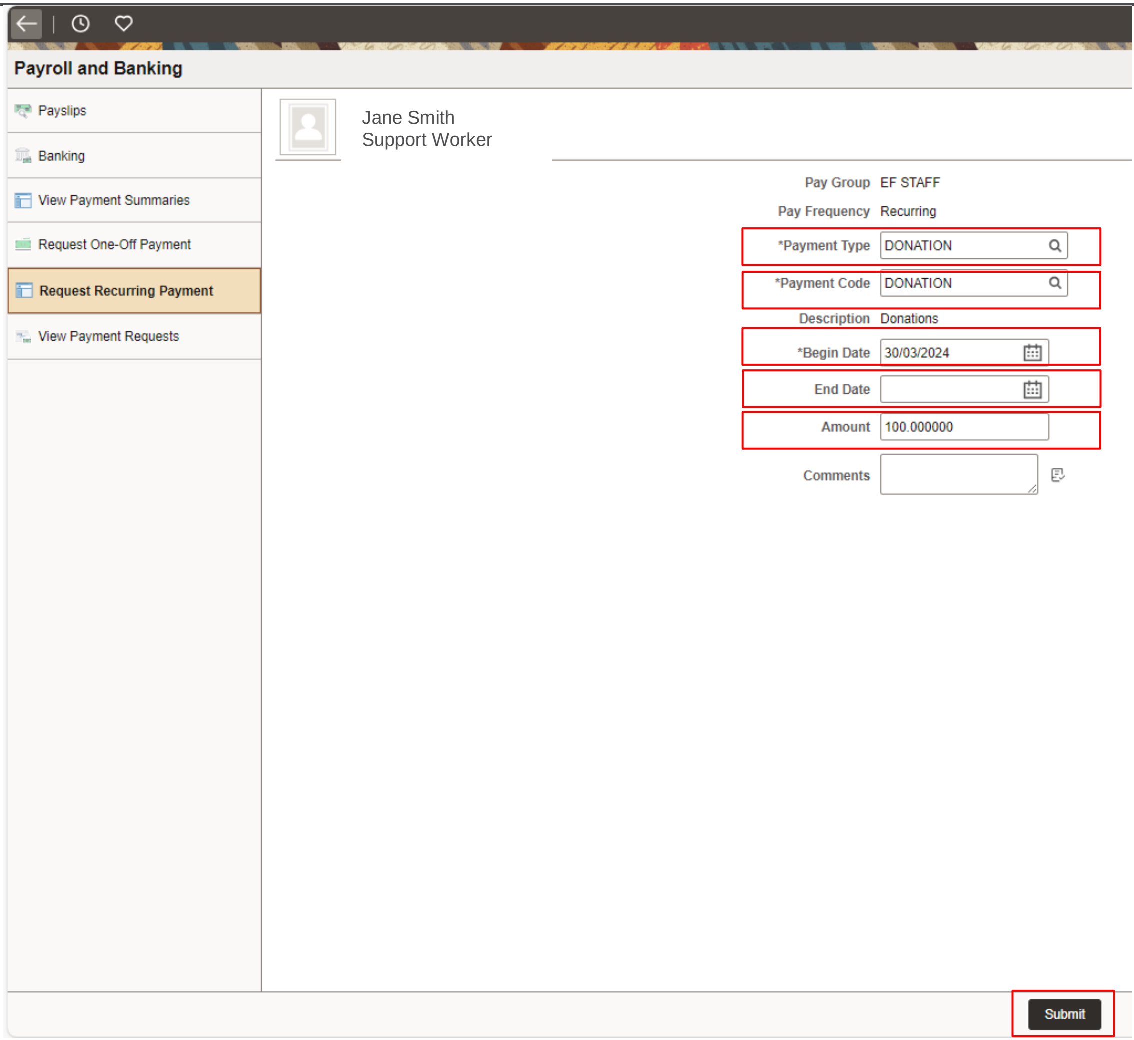
Request Recurring Payment can be utilised if you wish to set up recurring deductions for the following purposes:

- **Donation** - to Endeavour Foundation
- **Donation Pre Tax** - to Endeavour Foundation
- **Super** – Pre Tax (Amount or Percent) or Post Tax (Amount of Percent)

To set up a recurring payment:

1. Select *Payment Type*
2. Select *Payment Code*
3. Enter a *Begin Date* – ensure it is within the next two pay cycles
4. Enter an *End Date* – leave blank if you wish this payment to be perpetual
5. Enter the *Amount*
6. Add any **Comments**
7. Select *Submit*

The next screen should display the **Workflow Status = Approved.**

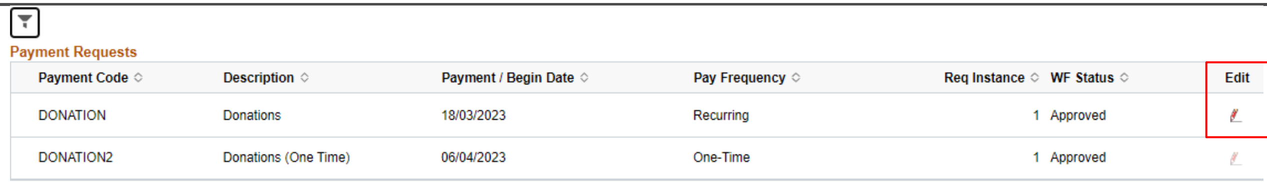


View Payment Requests

View Payment Requests will display a list of both One-Off and Recurring Payments that have been set up.

Set up a Recurring Payment with no End Date? Select *Edit* on the applicable entry to enter one in, ensuring you select *Submit* to save the change.

For all other adjustments please submit a ticket via the #TeamPossible Support Hub.



Payment Requests

Payment Code	Description	Payment / Begin Date	Pay Frequency	Req Instance	WF Status	Edit
DONATION	Donations	18/03/2023	Recurring	1	Approved	
DONATION2	Donations (One Time)	06/04/2023	One-Time	1	Approved	

Time and Leave

Select *Time* from the home screen.

My Time and Leave Overview

Enter Time – where you enter your timesheet

Set up Quick-Fill – save frequently used finance codes to make completing your timesheet quicker and easier

Time Summary – will display time entered for the current pay cycle

Cancel Absence – cancel an absence / request

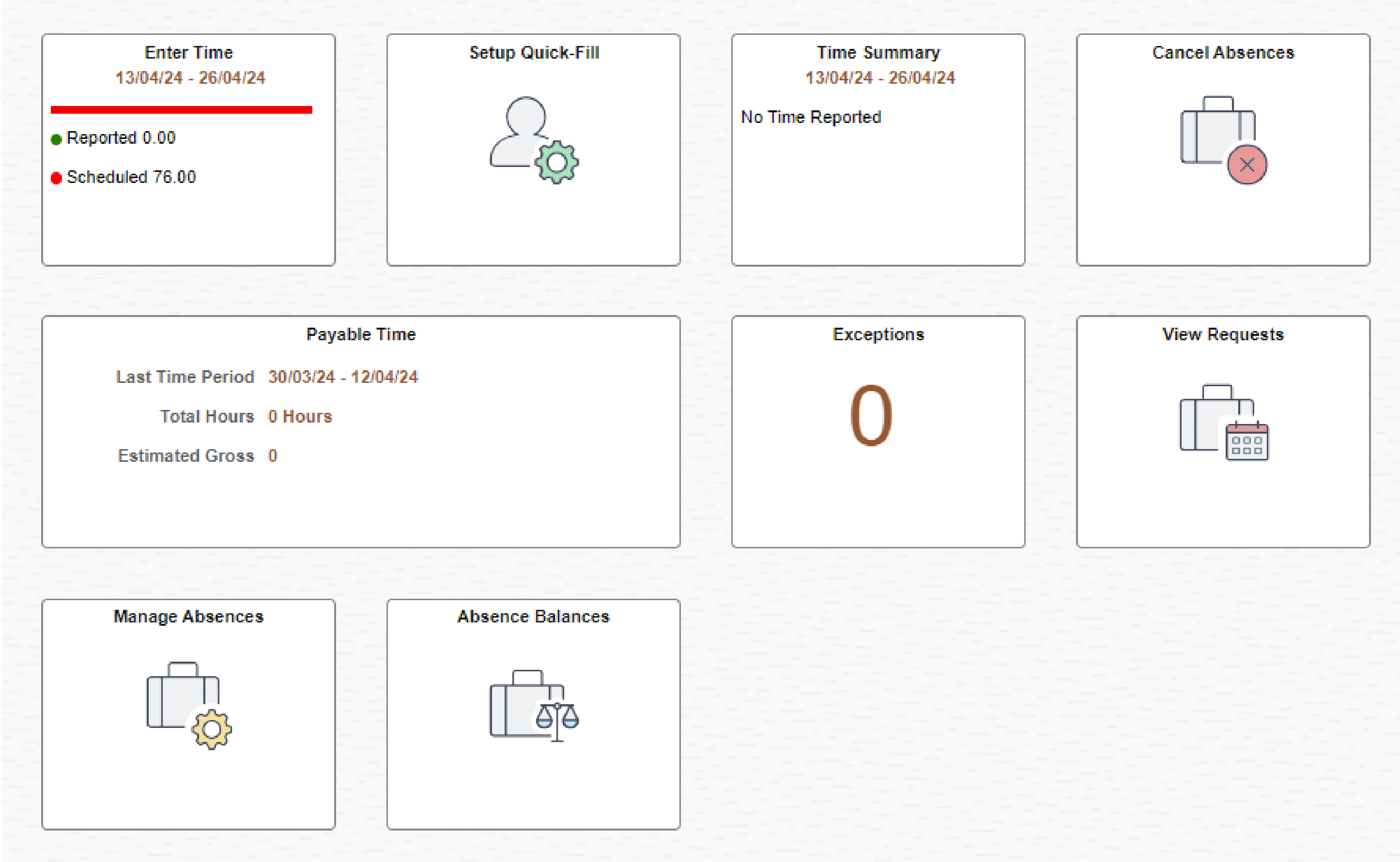
Payable Time – will display upcoming payable reported time

Exceptions – will display any overlaps of reported time and leave entered on your timesheet

View Requests – an overview of leave requested

Manager Absences – view/submit an absence request

Absence Balances – view and project leave balances here

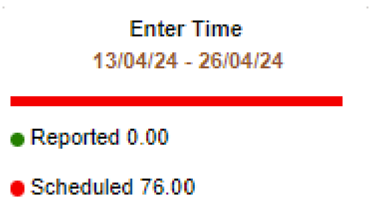


Enter Time

Complete your timesheet

This advice provides a step-by-step guide to completing your timesheet.

Click *Enter Time.*

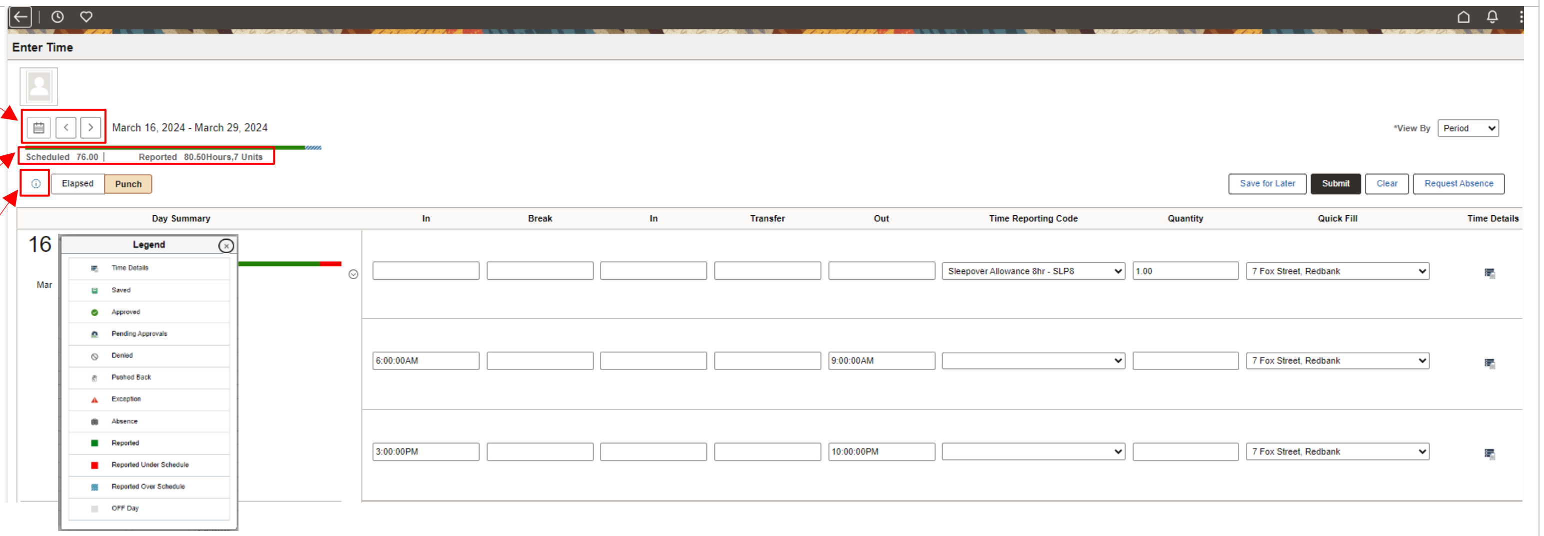


Navigating your Timesheet

Select/toggle between periods via the Calendar or '< >' arrows.

You can also view your Scheduled vs Reported Hours, Units directly.

Click on *information icon (i)* to view the various status icons and their meanings.

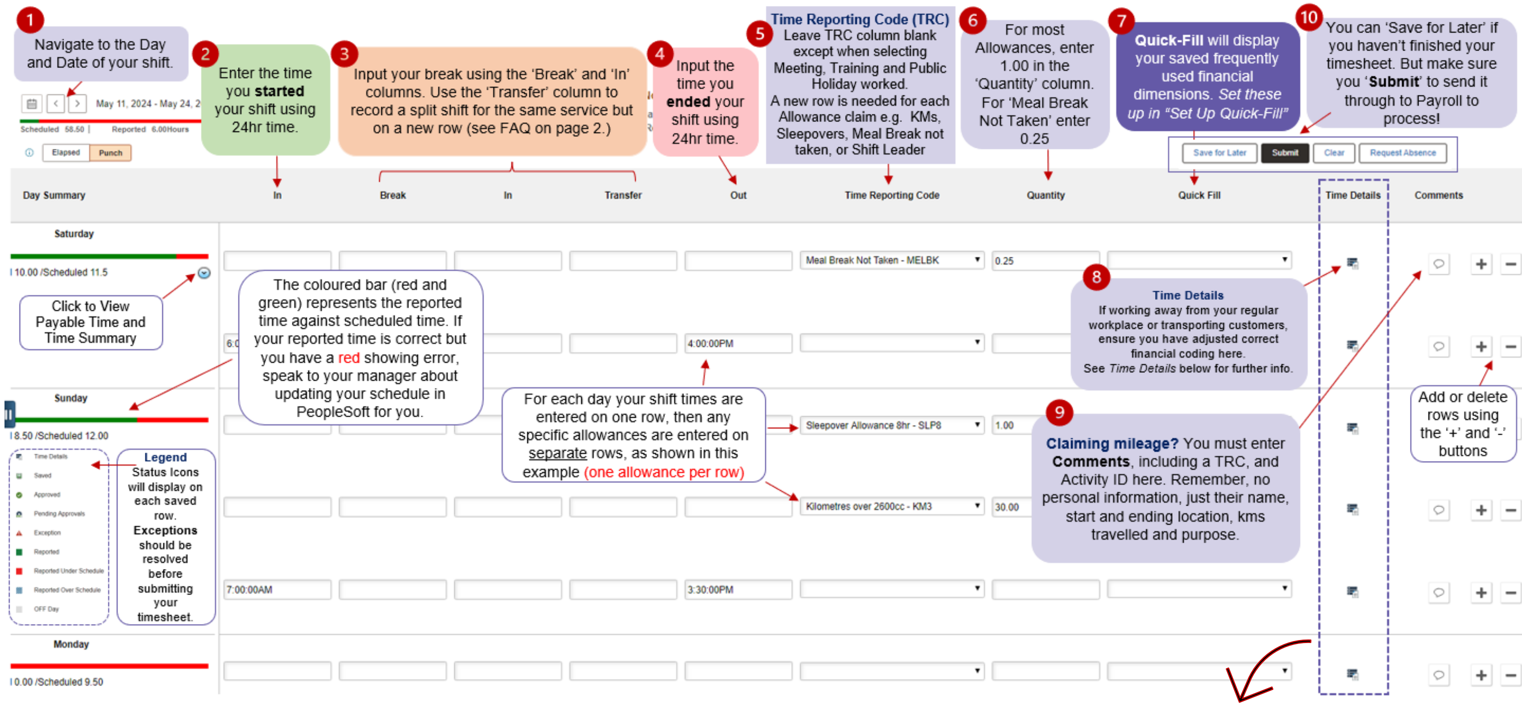


Utilise the following instructions to complete your timesheet.

Important

If you **worked at your home work location** for all shifts, you don't have to enter any codes via Time Details > Location, HR Department and Product columns – this will automatically populate in your timesheet.

If you **worked at two or more services** in one fortnight, then you will need to capture all the relevant coding information via **Time Details** (see below), so your time is costed to the correct budget.



Click on the *Time Details* icon.

Business Unit – not required to be adjusted

Location - refers to the physical address the service is based.

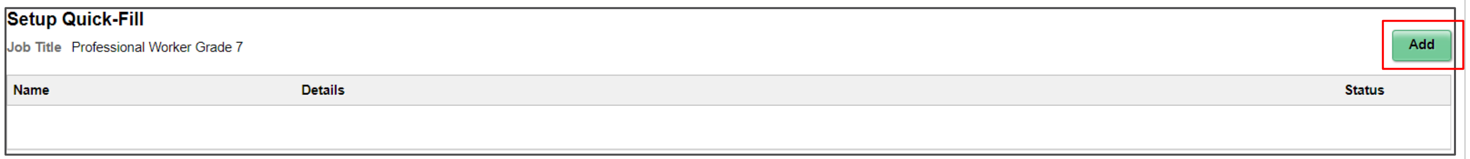
HR Department - (Business Unit) code is the type of service.

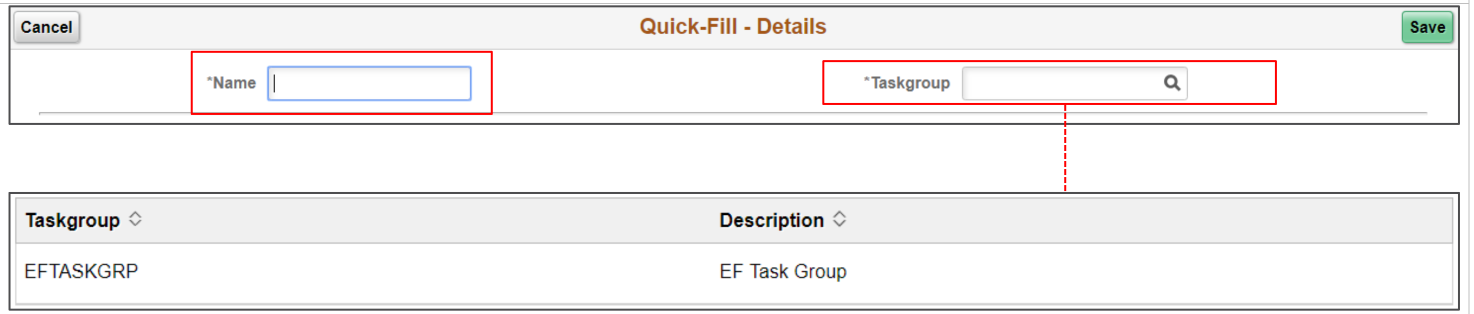
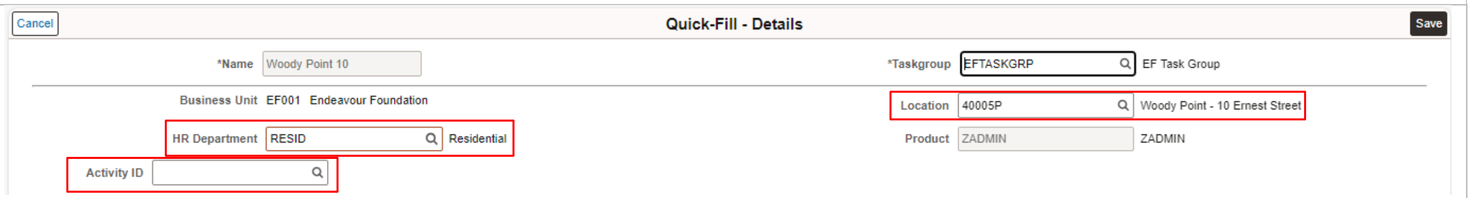
Time Detail Tips

- Use the Tab key to move between fields to ensure they remain editable
- Save frequently used Time Details codes via *Employee Self Service > Time > Setup Quick-Fill* which can then be selected via a drop down
- Cannot find a customer's Activity ID? Email creditman@endeavour.com.au or ask your leader

Product – the type of work being carried out **Activity** – enter the Customer ID here when transporting customers (you must also accompany this with Product = SDSMIL) To check your codes, go to: http://dimensiontool.endeavour.com.au/ OR speak to your leader.	
Once you have entered all the relevant details for the timesheet, click on *Submit*. **Note:** If using *Save for Later*, remember to *Submit* once the timesheet is completed as *Save for Later* will not send your timesheet for approval and payment.	

Set up Quick-Fill

Via PeopleSoft > Employee Self Service, select the **Time** tile and then select **Setup Quick-Fill**. Select the **Add** button to start. **Note:** Each favourite must be added separately. If you work in multiple	

locations and services, you will need add each one.	
This is where you Name the favourite financial code combination you will use regularly. Use a name of the service location and/or customer e.g. Fox St or Mermaid L&L. **Note**: For mileage and transporting customers, please name as follows: Transport + Customer's full name. E.g. "Transport Jane Smith" Now click on the search icon to bring up the Taskgroup. There is only one. Click on *EFTASKGRP*.	
Enter your financial dimensions for **Location**, **HR Department**, **Product**, and if applicable **Activity ID**. **Location**: Where you work **HR Department (Business Unit)**: The type of service **Product:** The type of work being carried out. Speak to your leader to ensure you are using the correct Product.	

Activity ID: Claim mileage by entering the customer ID here. If you cannot find the customer's Activity ID email: creditman@endeavour.com.au

Select *Save*.

Tips

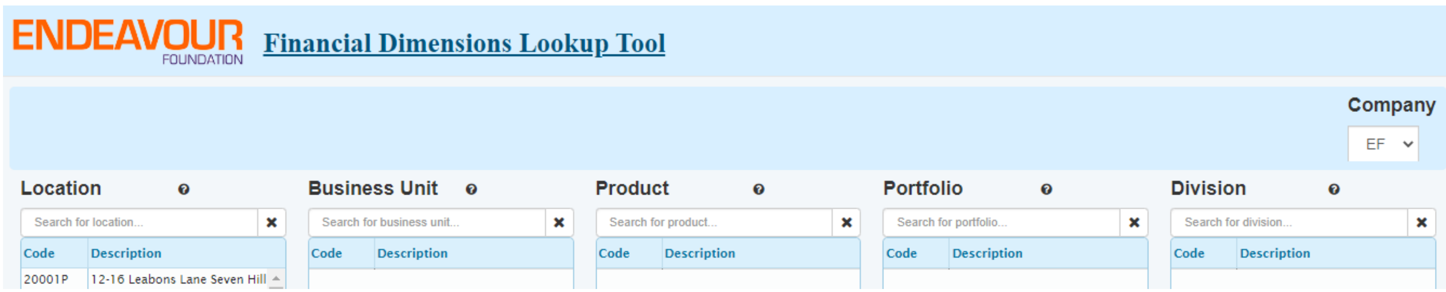
- Use the Tab key to move between the fields here to prevent the Product field from greying out.
- If you are unsure which Location, HR Department, Product, or Activity ID code to use please seek advice from your leader.

Financial Dimensions Lookup Tool

Validate your correct codes here: dimensiontool.endeavour.com.au

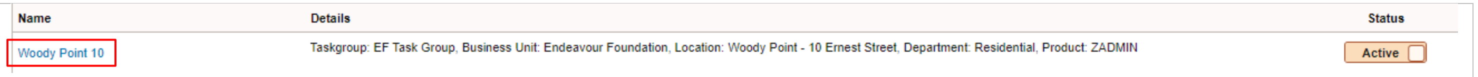
Location: Where you work

HR Department (Business Unit): The type of service



Update your Quick-Fill codes

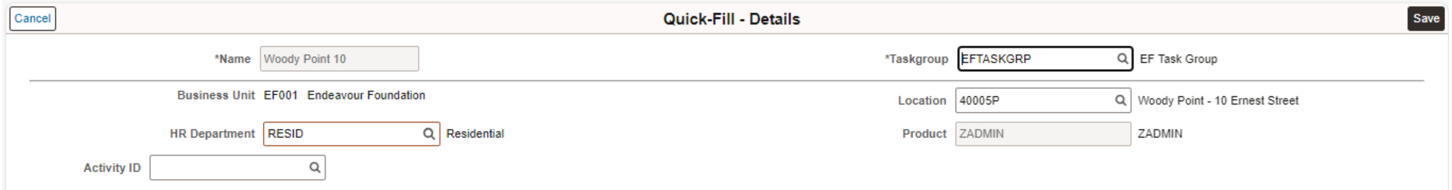
Select the applicable Quick-Fill entry.



Enter the new details into the **Location** and/or **HR Department** fields.

Activity ID: Claiming mileage by entering the customer Activity ID here. If you cannot find the customer's ID email: creditman@endeavour.com.au

Select *Save*.

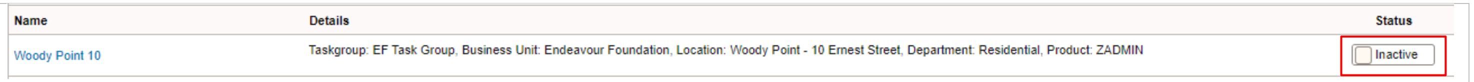


Note: You cannot edit the Name or the Product utilised in the Quick-Fill once it has been saved. If you need to edit these fields, create a new Quick-Fill and if applicable make the old one inactive.

Change the status of a Quick-Fill (Active/Inactive)

Via PeopleSoft > Employee Self Service, select the *Time* tile and then select *Setup Quick-Fill.*

Locate the Quick-Fill the applicable entry. Via the **Status** column, click the toggle to switch to *Active* or *Inactive.* This change will autosave.

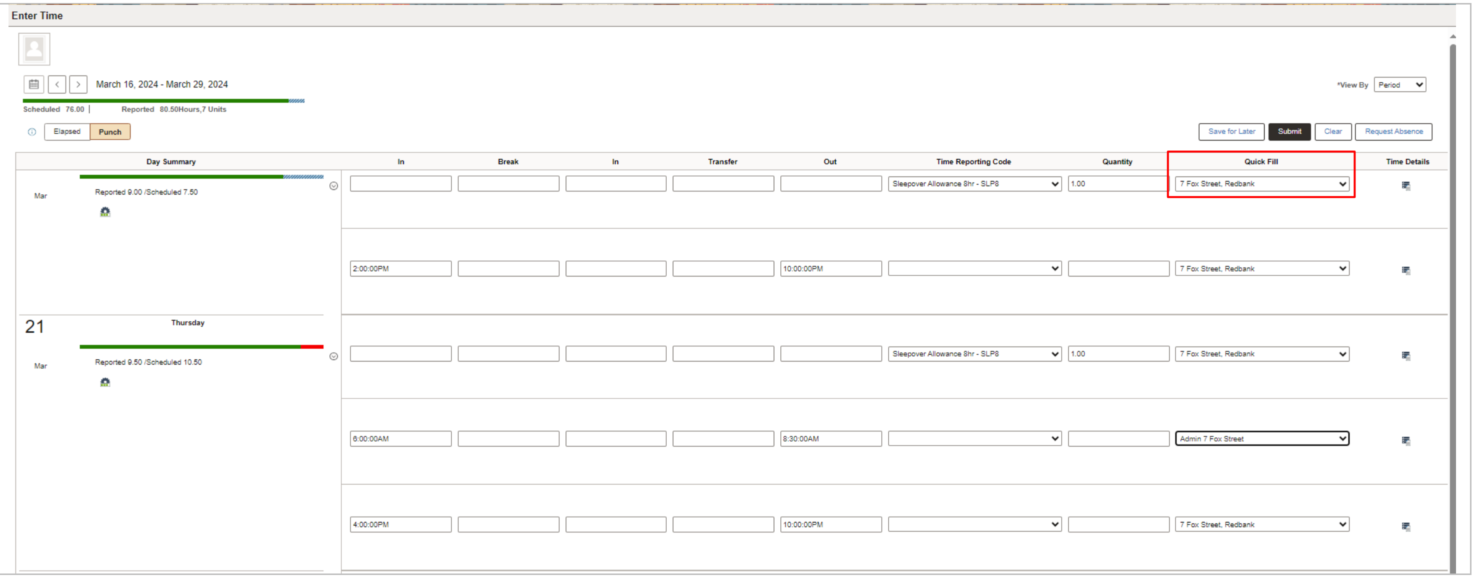


Note: Inactive Quick-Fills will no longer appear as a selection option on your timesheet.

Using Quick fill in your Timesheet

Your saved quick fills will now be available for selection via a drop-down option when completing your timesheet.

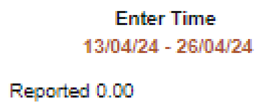
Note: you *do not* need to complete Quick fill for shifts completed at your regular work location. Select the **Time Details** icon on your timesheet to validate what this is.



Autopay Employees Only - Claiming Kilometres

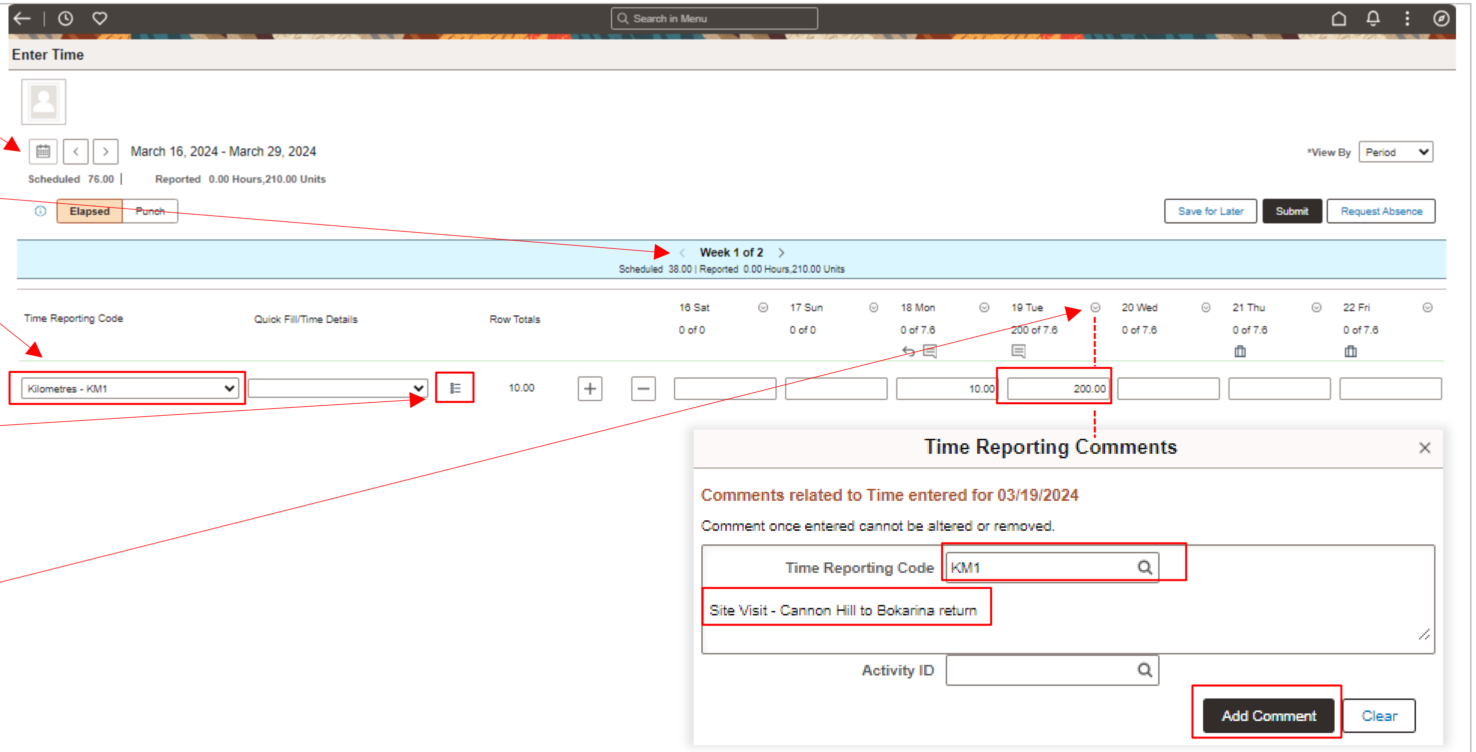
Follow the below instructions for claiming kilometre reimbursement in PeopleSoft if you are *not* required to complete a timesheet as part of your role.

Via **Employee Self Service**, select *Time* > *Enter Time*.



1. Select the applicable pay period by utilising the forward and back arrows/calendar date
2. Locate the applicable week / date utilising the forward and back arrows
3. Via **Time Reporter Code (TRC)**, select the applicable *Kilometres.*
4. Select *Time Details icon* to view where this claim will be costed to and adjust if necessary.
5. Enter the KM amount e.g. 20 in the text box underneath the applicable date
6. Enter comments - click the drop down icon next to the date and select Add/View Comments to enter a time reporting **comment** e.g. reason for travel, and **Time Reporting Code** (make sure you select the same TRC as what has been entered on the timesheet).
7. Select *Add Comment*
8. If you are ready to finalise the claim, select *Submit*.

Once submitted, the claim will then be routed to your leader for approval.

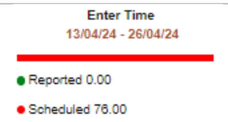


Note: for your claim to be paid at the next pay date, all claims need to be submitted by Friday COB and approved by Monday COB of pay week.	

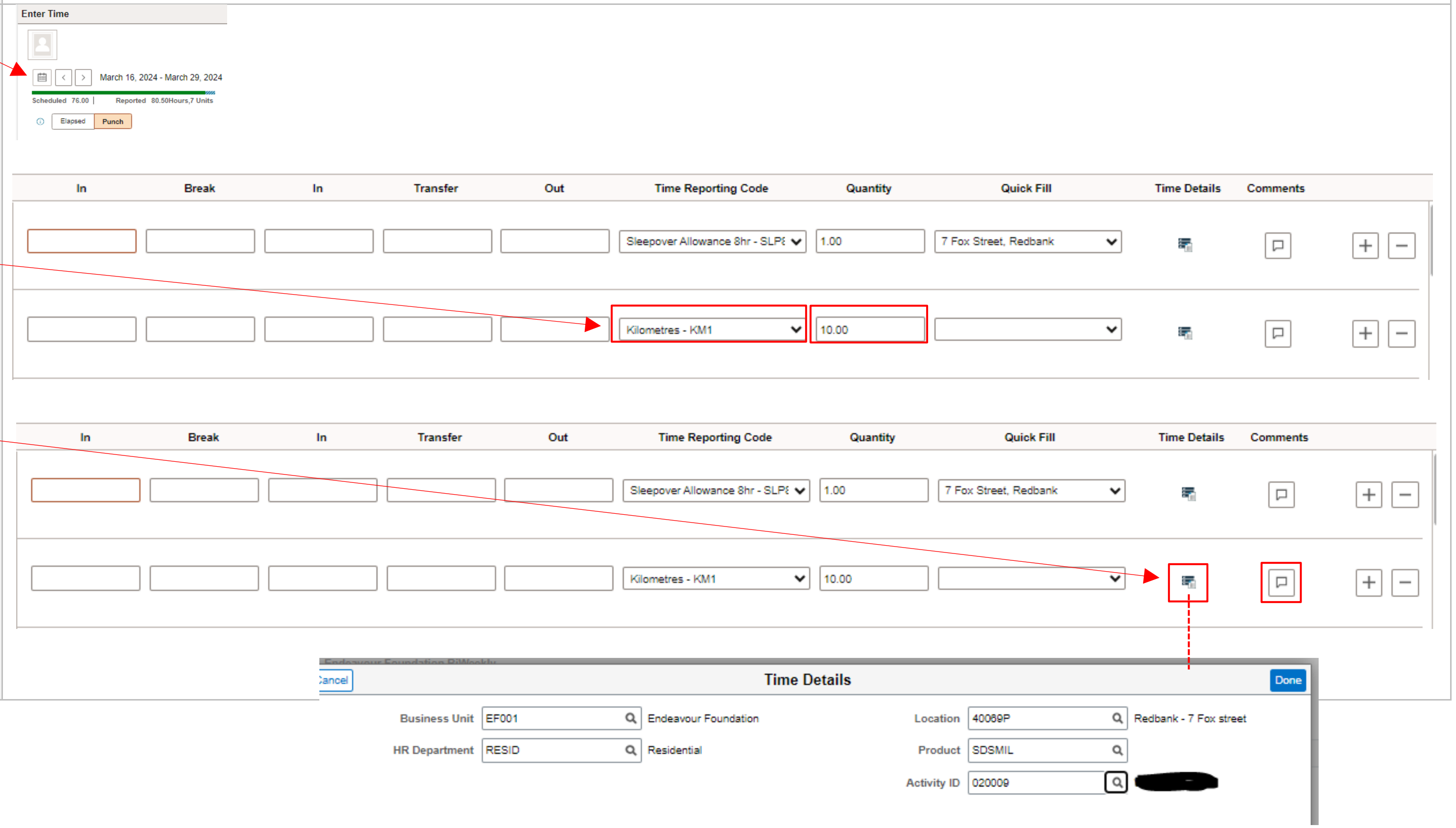
Timesheet Employees – Claiming Kilometres when Transporting Customers

Follow the below instructions for claiming kilometre reimbursement in PeopleSoft when transporting customers.

Via **Employee Self Service**, select *Time* > *Enter Time*.



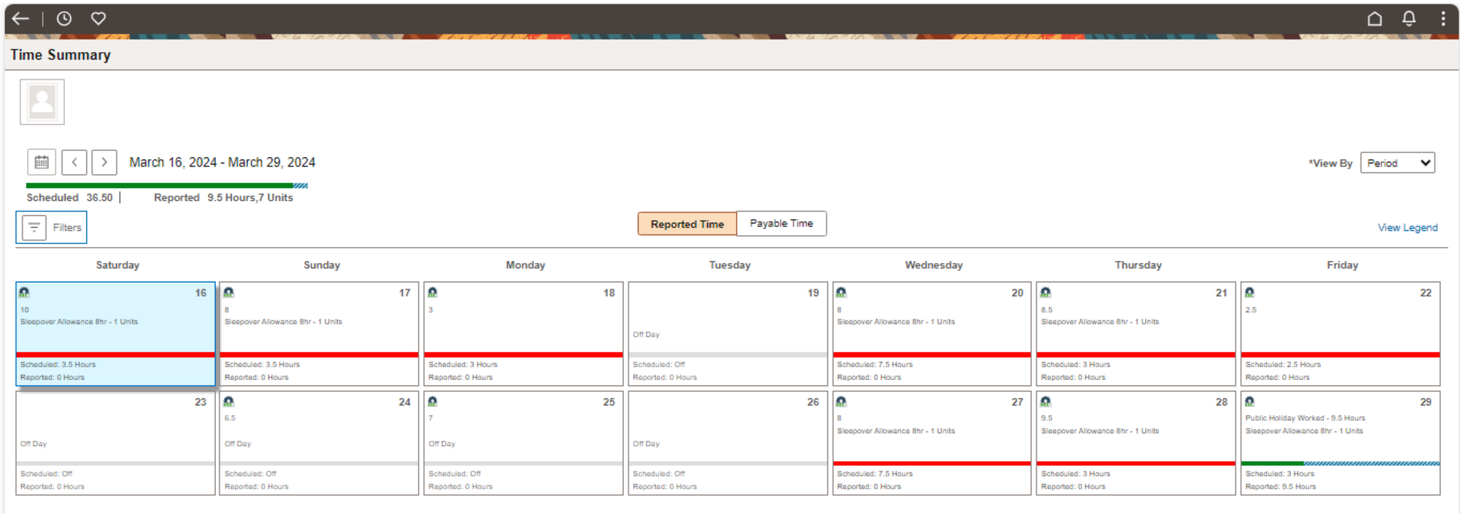
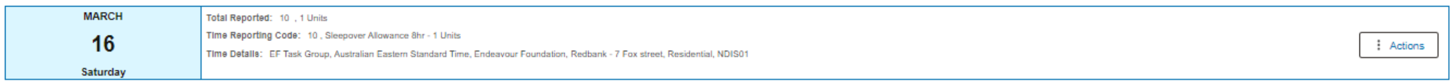
1. Select the applicable pay period by utilising the forward and back arrows/calendar date
2. Scroll to the applicable date, and click the '+' button to add a new row
3. Via **Time Reporter Code (TRC)**, select the applicable *Kilometres.*
4. Enter the KM amount e.g. 20 in the Quantity field
5. **Time Details** - select to view where this claim will be costed to and adjust if necessary. You must enter the customer Activity ID and Product = SDSMIL here for Billing purposes
6. **Time Reporting Comments** - click the bubble to enter a



Time Reporting Code, **Comment,** e.g. reason for travel, and **Activity ID**. You must ensure the TRC and Activity ID match what has been entered in Time Details 7. Select *Add Comment* 8. If you are ready to finalise the claim, select *Submit*. Once submitted, the claim will then be routed to your leader for approval.	**IMPORTANT** • You must ensure the **Time Reporter Code** and **Activity ID** entered in *Time Details* and *Time Reporting Comments* match • When claiming mileage for transporting customers you must utilise **Product** = SDSMIL • You must also ensure **Time Reporting Comments** have been entered for all KM claims Incomplete data impacts our reporting and billing reconcilation proceess which may delay KM claim reimbursments.

Time Summary

This advice provides an overview of your scheduled and reported time across a chosen period of time.

Click on the *Time Summary* button under My Time and Leave.	
You can change the calendar view for weekly, fortnightly, or monthly. The calendar square shows a summary of hours reported for the Time Reporting code for that day. Click on the day to show additional information. You can also edit if the details are incorrect from this page.	
The *Actions > Edit Time* button takes you back to the Enter Time page to change or update your timesheet for that day.	

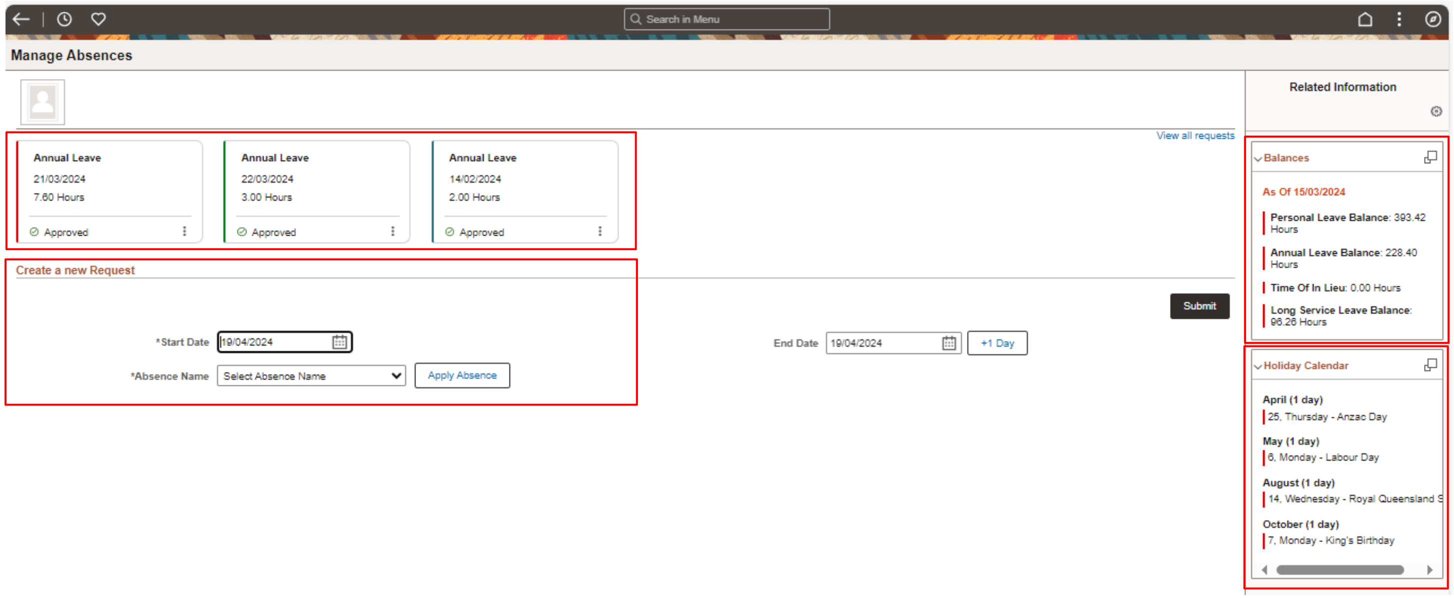
Leave

Apply for leave

Via *My Time and Leave* > Select *Manage Absences.*

Your **Manage Absences** page will display:

- **Recent leave transactions** – select *View All requests* to view more
- **Absence Balances –** view all leave balances here
- **Holiday Calendar - see** upcoming Public Holidays
- **Create a new Request –** apply for leave

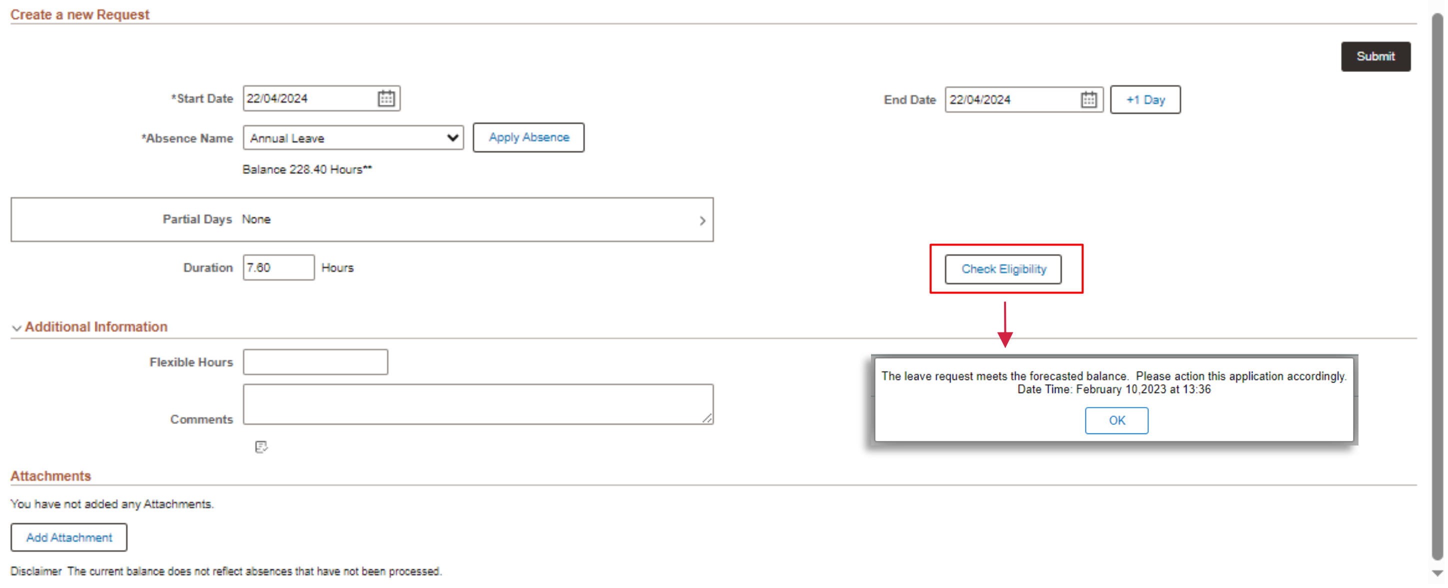


Create a new Request

1. Enter the **Start Date** and **End Date**
2. Select the **Absence Name**
3. Select *Apply Absence* to open additional fields
4. Taking partial leave? Select *Partial Days* to open a window where you can enter your leave duration
5. Now select *Check Eligibility* to confirm the leave request meets the forecasted balance.
6. Add any **Comments**.
7. If applicable *Add Attachment* e.g. Medical Certificate

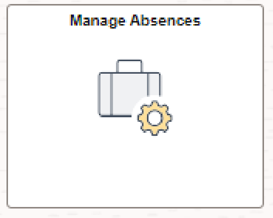
Once finalised, select *Submit.*

Your request will now route to your leader for approval. You will receive a notification confirming both submission, and approval outcome once your leader has reviewed the transaction.



Applying for Family and Domestic Violence Leave

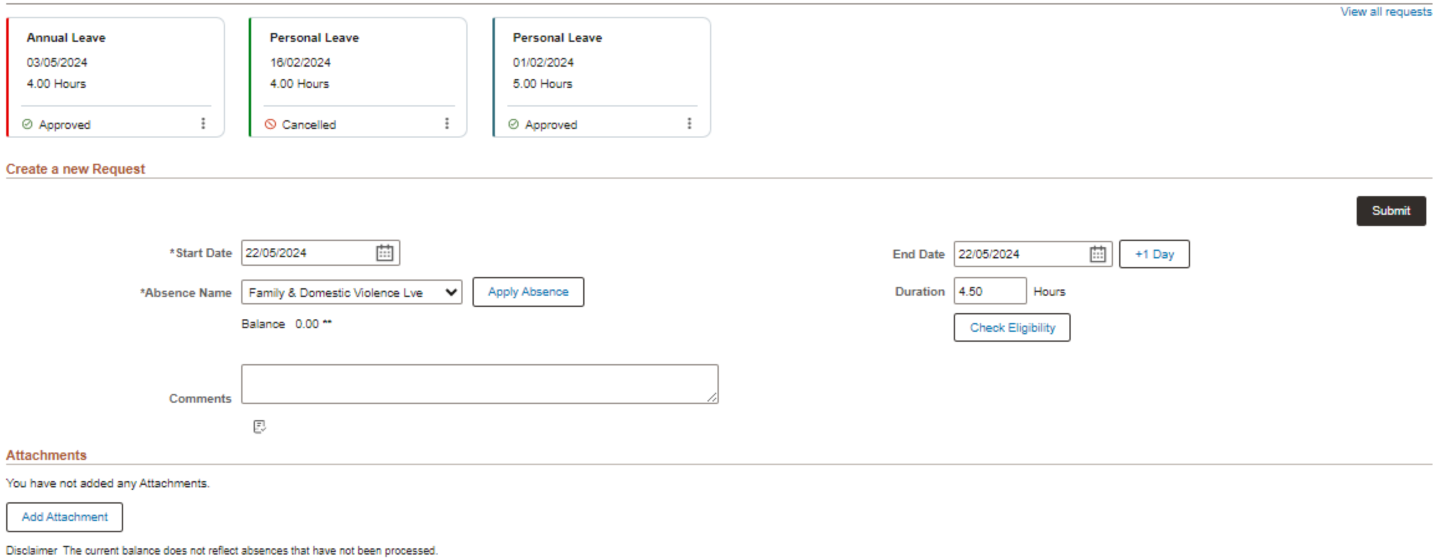
Via *My Time and Leave* > Select *Manage Absences.*



1. Enter the **Start Date** and **End Date**
2. Select the **Absence Name**
3. Select *Apply Absence*
4. Now select *Check Eligibility* to confirm the leave request meets the forecasted balance.
5. Add any **Comments**.

Once finalised, select *Submit.*

Your request will now route to your leader for approval. You will receive a notification confirming both submission, and approval outcome once your leader has reviewed the transaction.

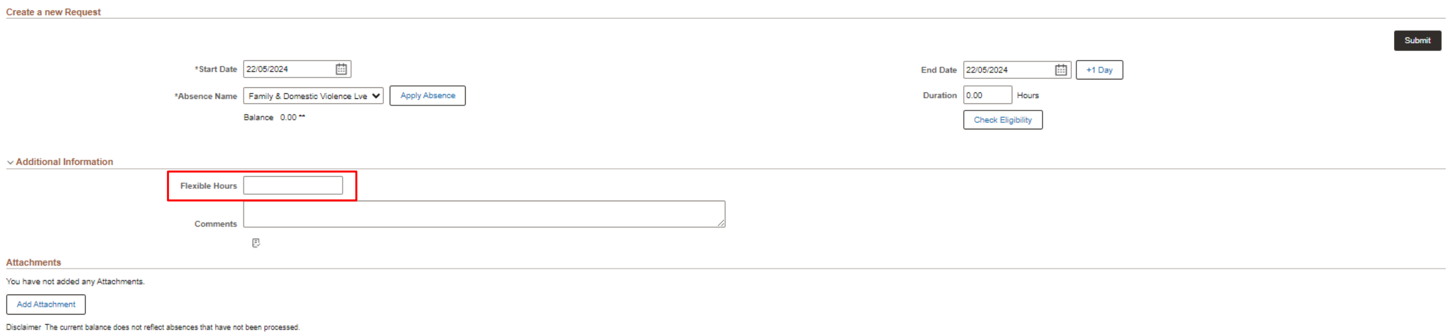


Casuals

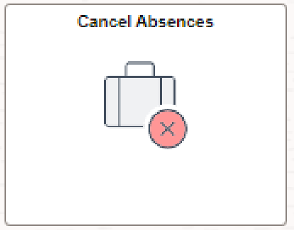
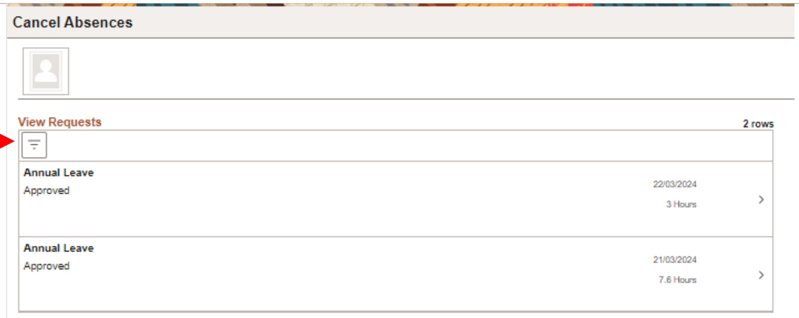
As a schedule does not exist in the system for you, you will need to enter *Flexible Hours.*

1. Enter the **Start Date** and **End Date**
2. Select the **Absence Name**
3. Select *Apply Absence.* **Flexible Hours** should now appear
4. Enter the number of hours you were rostered to work over that period
5. Now select *Check Eligibility* to confirm the leave request meets the forecasted balance.
6. Via **Comments,** please advise per day the hours rostered to work.

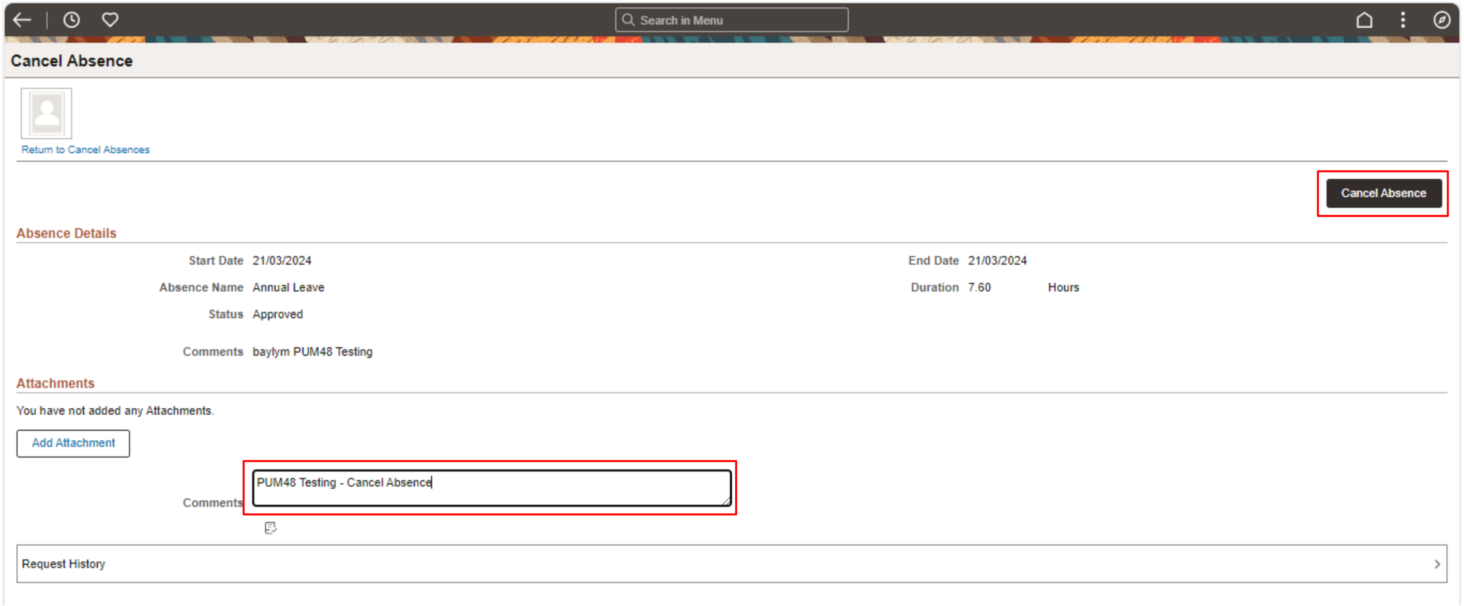
Once finalised, select *Submit.* The transaction will now be reviewed by the Payroll team with your Manager before payroll processing is finalised.



Cancel leave applications

Click on the *Time* button on the home screen, then select *Cancel Absences.*	
Select the applicable leave reqest from the list. Adjust the date filters if you cannot locate the leave in question. **Note**: Managers can cancel all leave applications on behalf of the employee, regardless of whether they are submitted by the employee or the manager themselves.	

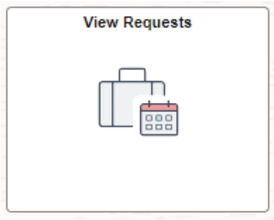
Enter any relevant comments about why the leave is being cancelled, and then click on the *Cancel Absence* to cancel the leave application.

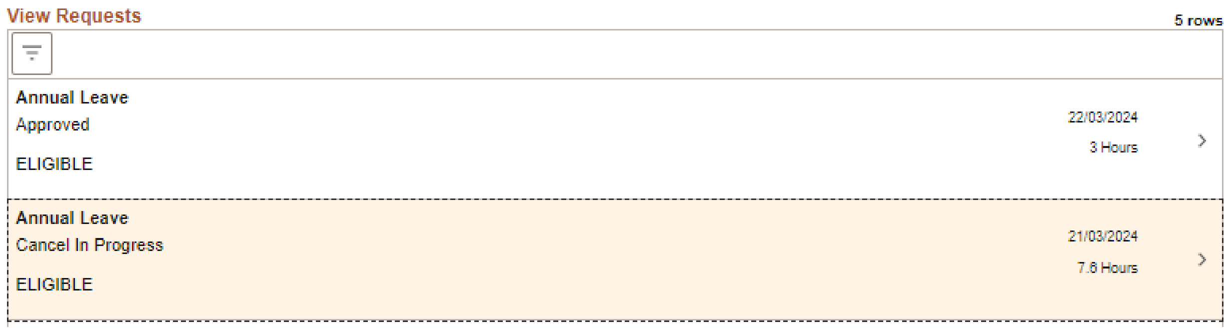


You will then be prompted to confirm whether you wish to cancel the leave application, so select *Yes.*

The cancelation request will now be sent back to your leader for approval.

<table>
<tr>
<td>Click on the Time button on the home screen

Then select View Requests.</td>
<td>
</td>
</tr>
<tr>
<td>Now, the employee’s leave requests will be displayed.

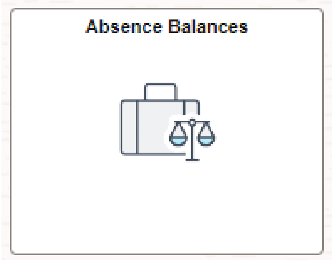
Note: If the manager applied for the leave on the employee’s behalf, it would display the comment ‘Manager Absence Request’</td>
<td>
</td>
</tr>
</table>

Absence Balances

In this section you can view the balance of your personal and annual leave as of today's date, as well as check how much annual leave you will have on a future date.

Click on the *Time* button on the home screen

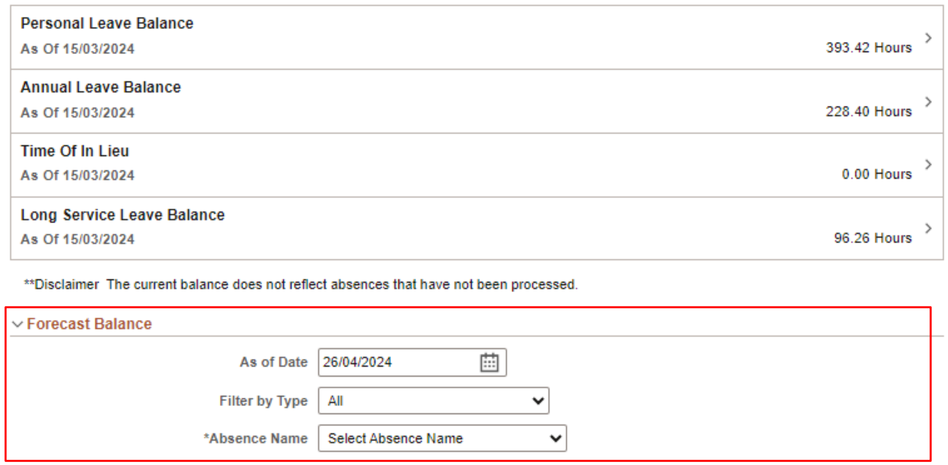
Then select *Absence Balances.*



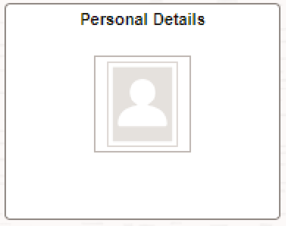
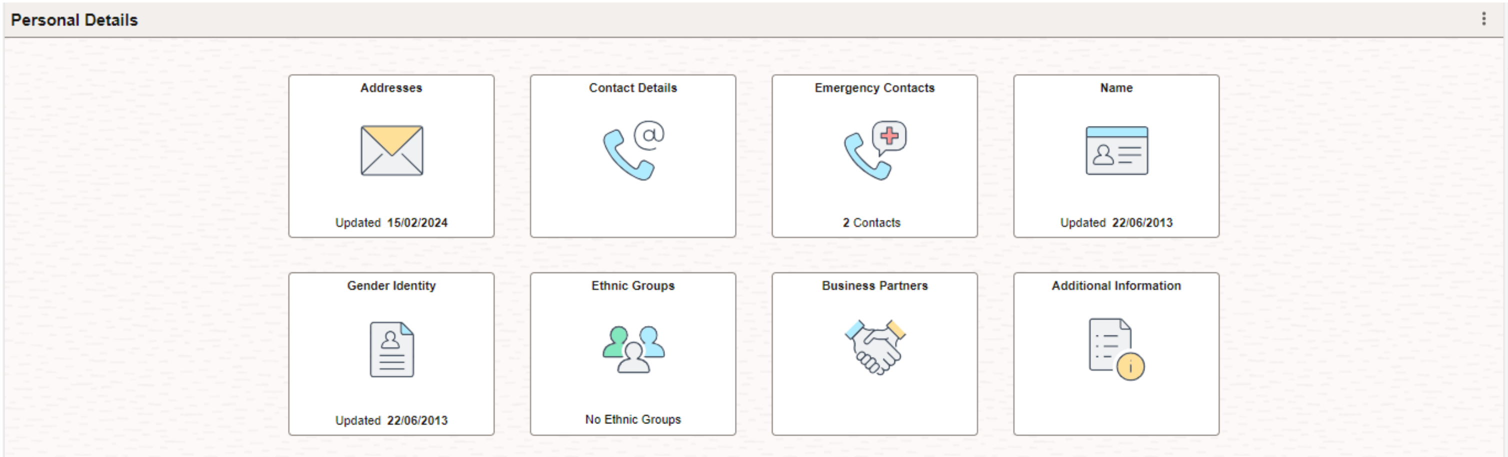
Select *Forecast Balance* to check your leave balance based on a future date.

Simply enter a date in the future and select 'Annual Leave'.

Note: You can only check a forecast balance for your Annual Leave.



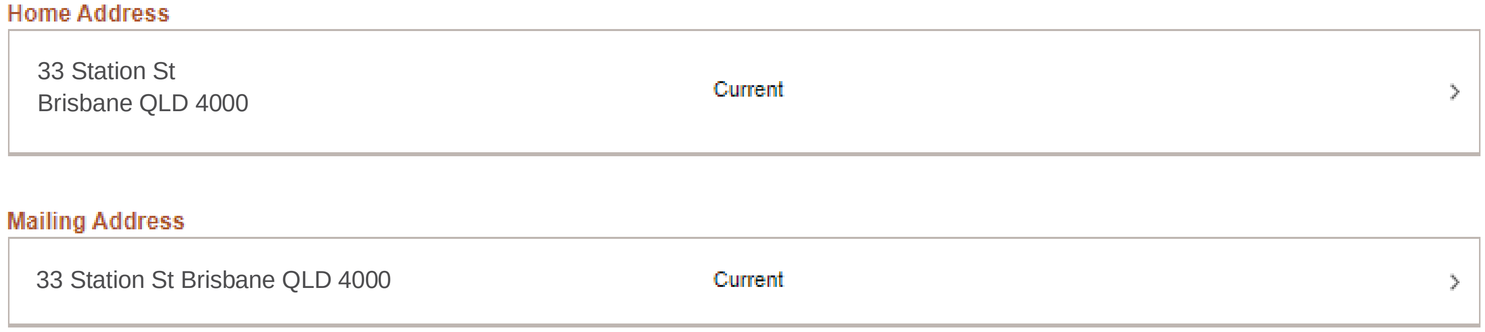
Personal details

Click on *Personal Details*	
Here you can review and update your own details, including **Addresses**, **Contact Details**, **Emergency Contacts**, **Name** (with valid support documentation), **Gender Identity**, **Ethnic Groups**, **Business Partners**, **Additional Information** where you can add a profile photo.	

Addresses

Home Address – select '+' if you have never entered your address before. Alternatively select the arrow to the right of the current entry to open the window where you can simply enter your new details. Make sure to select *Save* to confirm any changes.

Mailing – you can also enter a mailing address if different to your home.



Contact Details

Add/edit your phone numbers and email addresses here.

Select '+' if you have never entered your phone number before. Alternatively select the arrow to the right of a current entry to open the window where you can simply enter your new details.

You can have multiple numbers; however please ensure you identify one as *Preferred*. Make sure to select *Save* to confirm any changes.

Note: when adding SMS Notification Type, please make sure you denote your mobile with your country code '+61' and drop the '0' e.g. 0412 000 000 becomes '+61412000000.

Phone

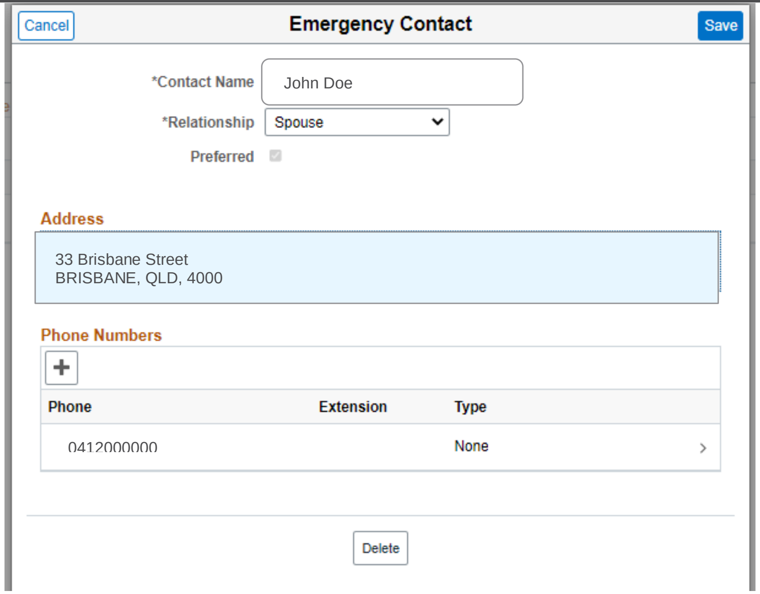
+

Number	Extension	Type	Preferred	
0400 000 000	0	Mobile	✓	>
+61412000000		SMS Notification		>
3900 0000	0	Home		>
3900 5453		Work		>

Email

+

Email Address	Type	Preferred	
Jane.Doe@endeavour.com.au	Business	✓	>

Emergency Contacts Add/Edit/Delete your emergency contacts via this section. You can have multiple; however please ensure you identify one as *Preferred*.	

Name

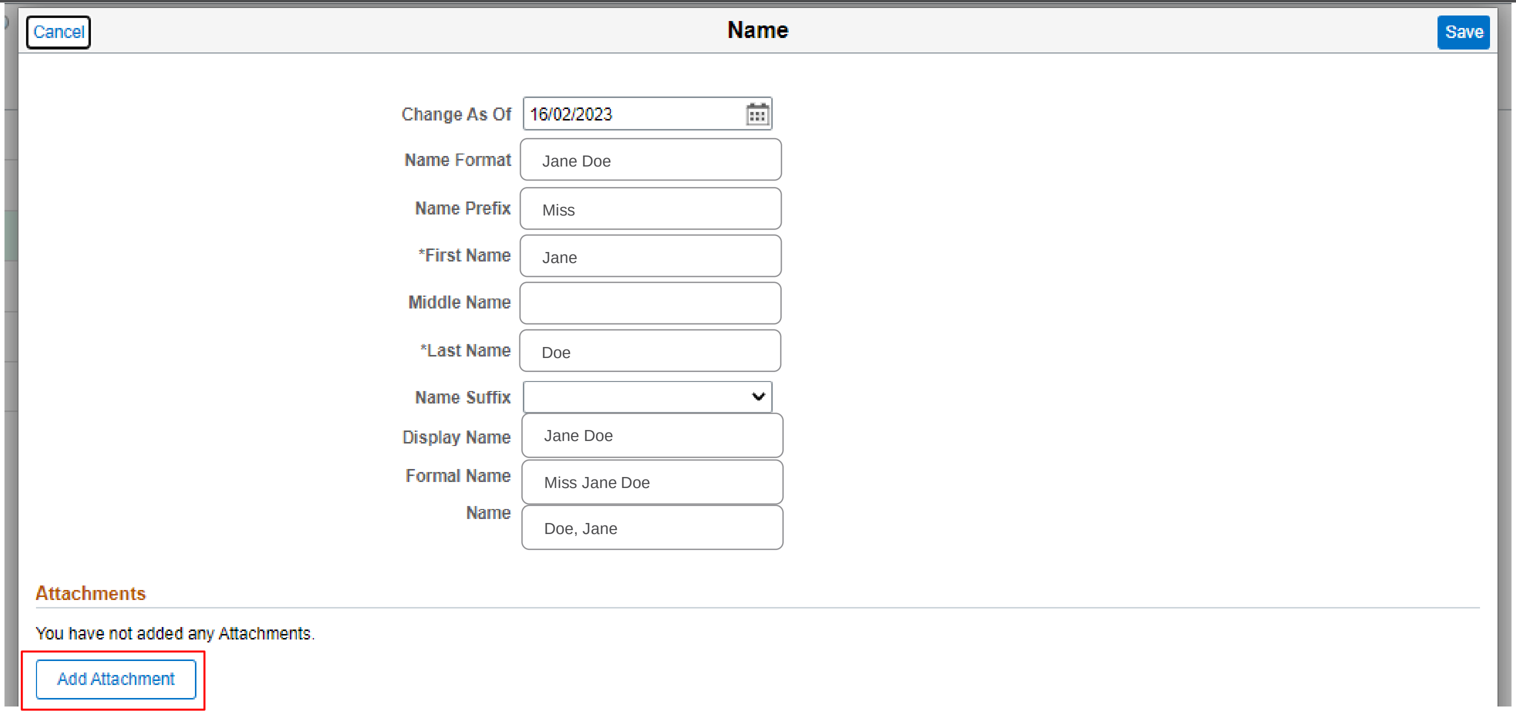
You are able to update your name via this section.

Mandatory fields:

- **First Name**
- **Last Name**
- **Add Attachment** – supporting documentation **must** be provided.

Important: valid supporting documentation must accompany your submission in order for People & Wellbeing to approve any name change.

Ensure you select *Save* to confirm any changes.

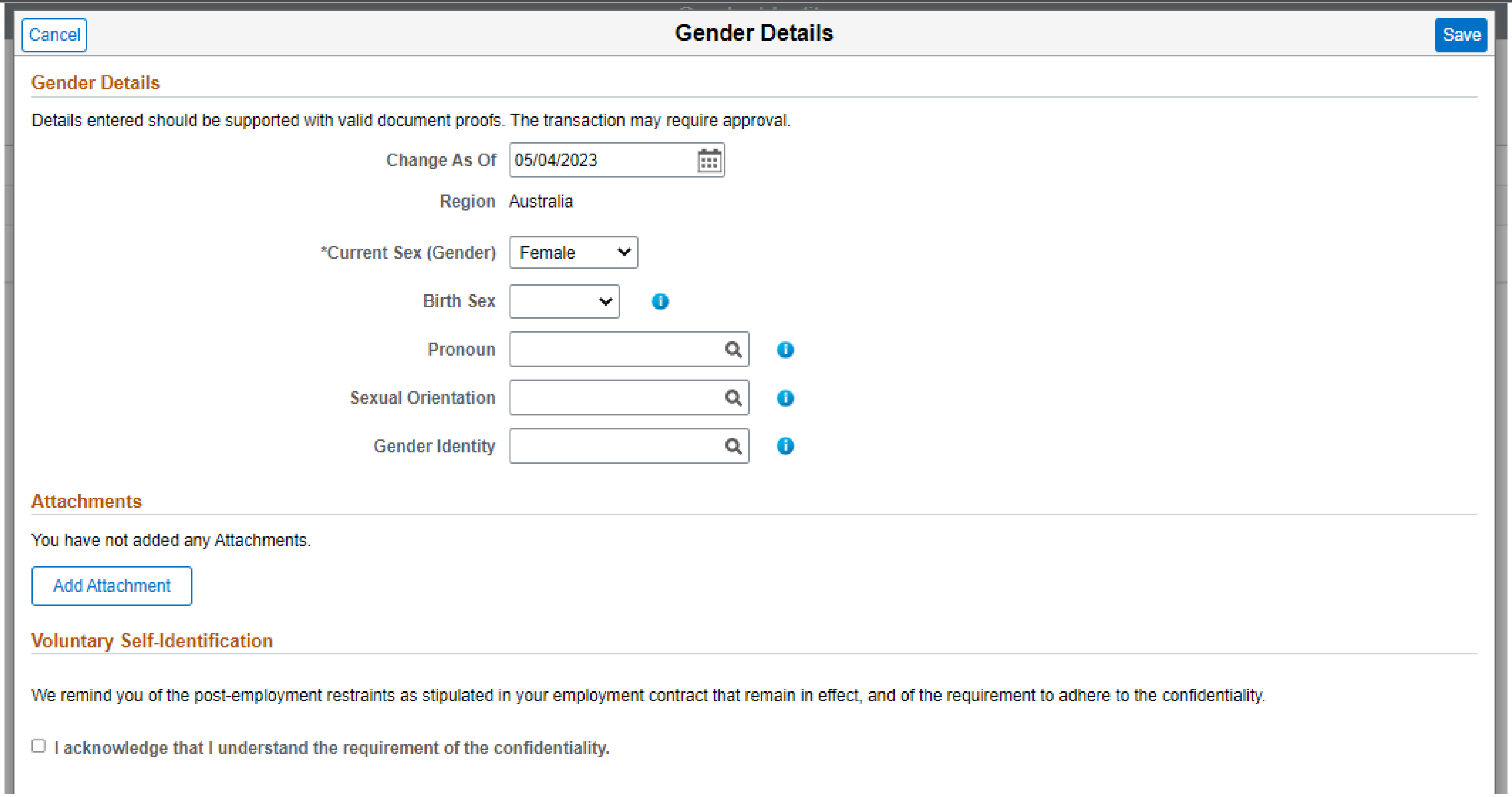


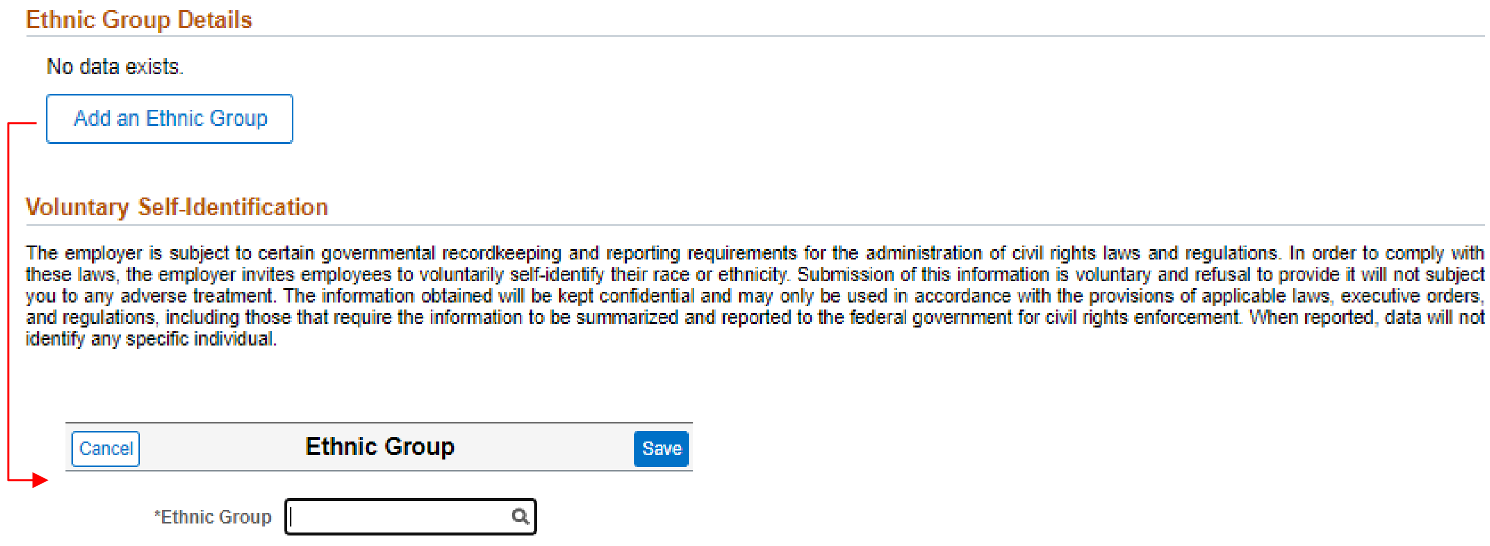
All Name Changes must be submitted via *ESS > Personal Details*. Submissions received via Service Now will not be accepted.

Gender Identity

In this section you can update your personal information, including gender identity and gender pronouns, in PeopleSoft.

Ensure you select *Save* to confirm any changes.



Ethnic Groups If you wish to add this information to PeopleSoft, select *Add an Ethnic Group*, and choose your ethnicity type clicking on the choices provided. Ensure you select *Save* to confirm any changes.	
Business Partners Locate your People & Wellbeing Business partner via this tile.	

Additional Information

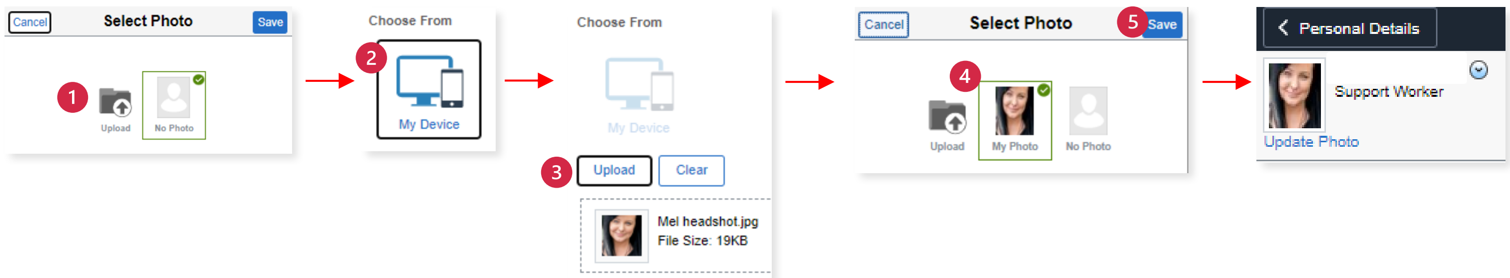
Here you can view additional information such as your *Date of Birth* and associated *Start Dates*.

You will also have read only access to your **Visa/Permit Data** (if applicable). Submit a #TeamPossible Support Hub ticket if this information is incorrect.

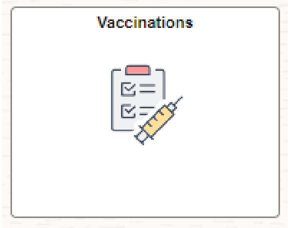
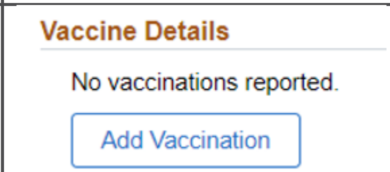
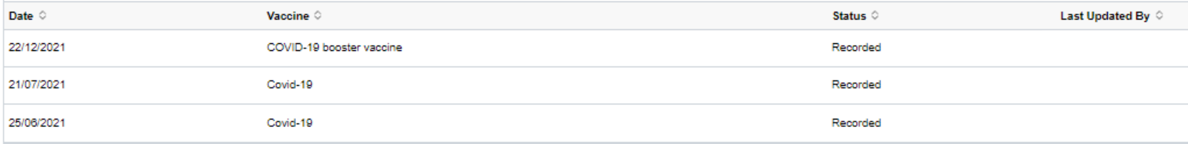
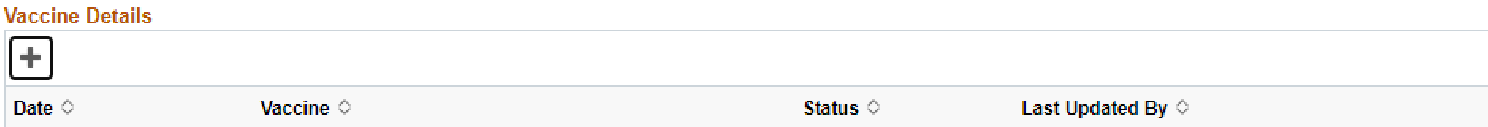
Add a Profile Photo

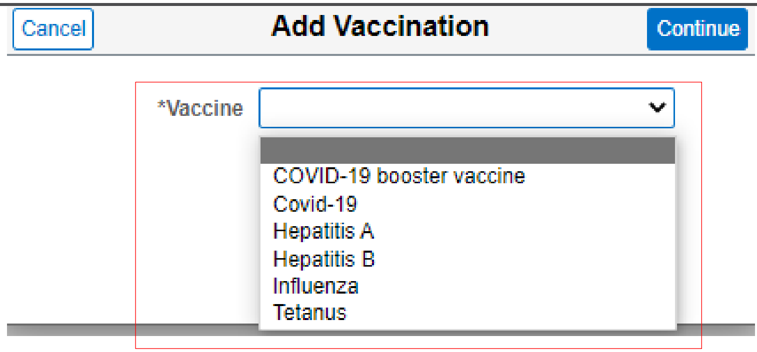
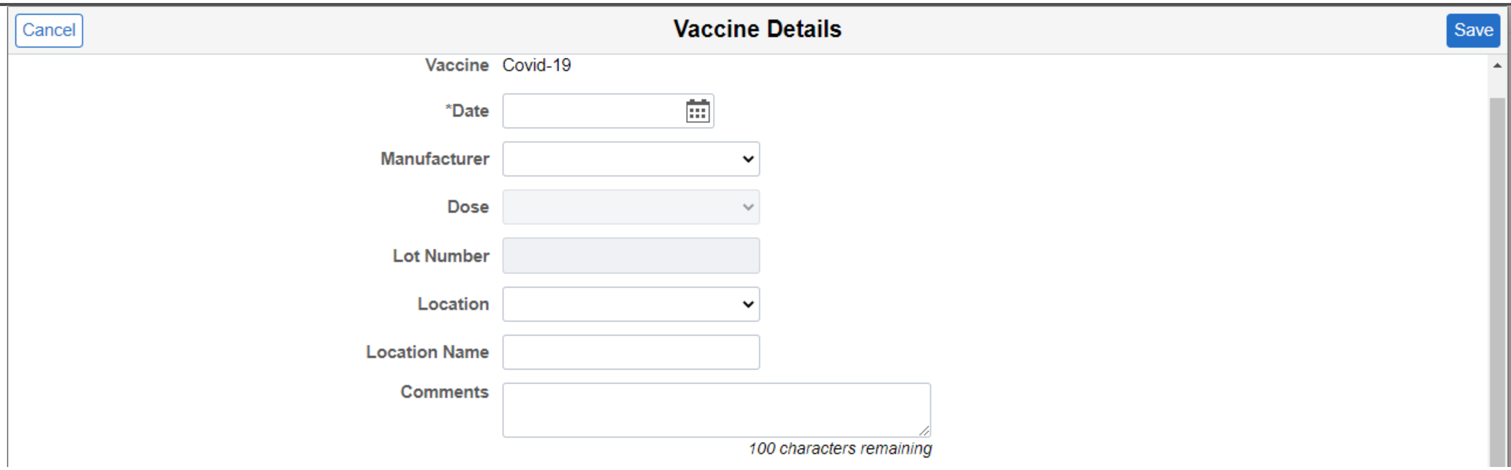
1. Select *Update Photo.*
2. Select *Upload*
3. *Click My Device*
4. Select your image (this image will be public, ensure it is appropriate for work purposes)
5. Select *Upload* > *Done*
6. Select *Save*

Tip: Select "No Photo" at Step 2 if you no longer wish to have a photo displayed.



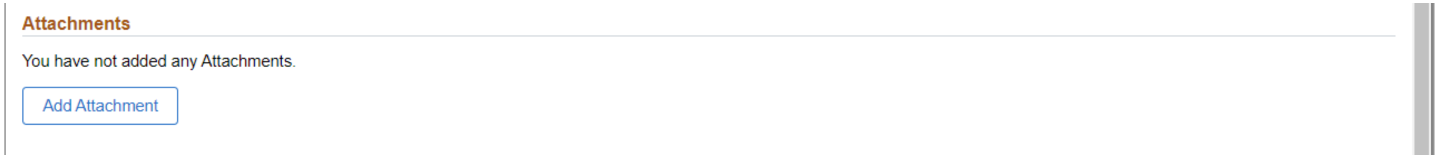
Vaccinations

<table>
<tr><td>Click on Vaccinations</td><td>
</td></tr>
<tr><td>If you have never entered any vaccination details the following default view will display.</td><td>
</td></tr>
<tr><td>However, if you have previous vaccination details loaded a list will now appear.</td><td>
<table>
<tr><th>Date</th><th>Vaccine</th><th>Status</th><th>Last Updated By</th></tr>
<tr><td>22/12/2021</td><td>COVID-19 booster vaccine</td><td>Recorded</td><td></td></tr>
<tr><td>21/07/2021</td><td>Covid-19</td><td>Recorded</td><td></td></tr>
<tr><td>25/06/2021</td><td>Covid-19</td><td>Recorded</td><td></td></tr>
</table></td></tr>
<tr><td>To enter new details of your vaccination history, select the plus (+) icon. A pop up will now display.</td><td>
</td></tr>
</table>

Select the applicable vaccine from the drop-down menu, then select *Continue.*	
Enter the details related to the vaccine you have received. **Date (mandatory):** this must be the date you received the vaccine **Manufacturer**: will be different for each Vaccine type **Dose**: select the appropriate dose number applicable **Lot number**: not required **Location**: can leave blank or select Other or Workplace to ensure the details of where the vaccine was administered are recorded. **Comments**: add any additional information here (100-character limit)	

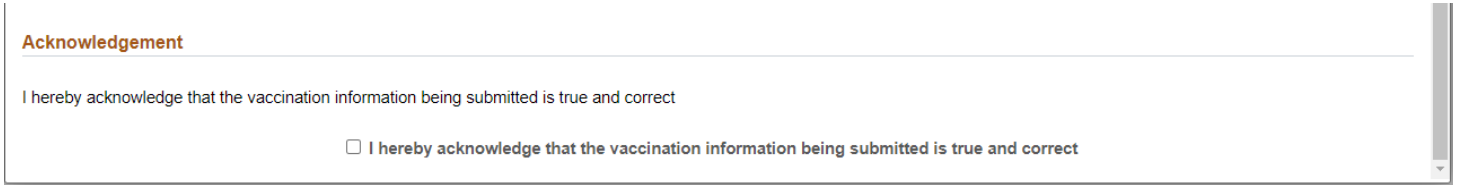
Add Attachment (mandatory): Accepted evidence –

- *Government Immunisation History*
- *Government Digital certificate*
- *Department of Health Consent form*
- *Department of Health Vaccination Card*



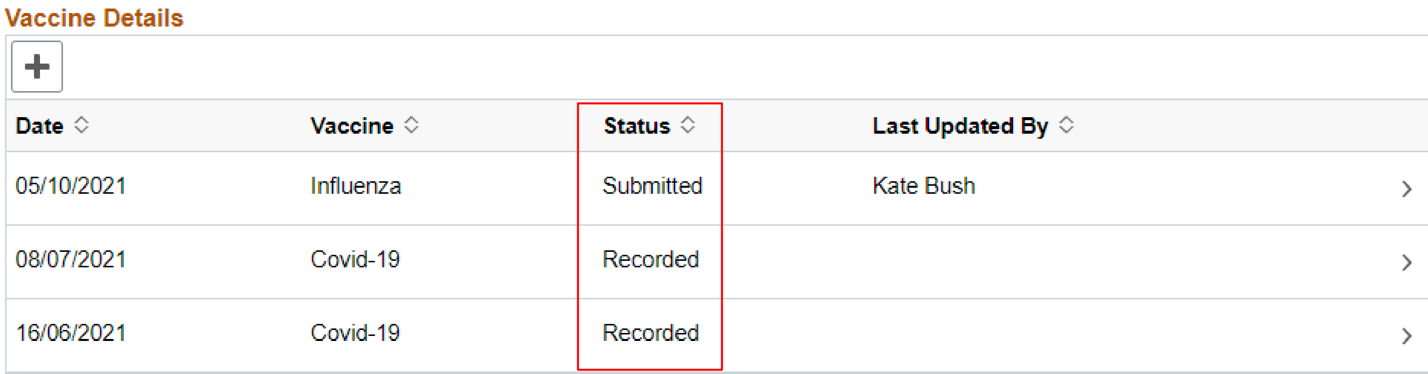
Acknowledgement: review and tick the acknowledgement box confirming all your details are true and correct.

Select *Save*. The transaction will be submitted to P&W for review and approval.



You will be able to see the **Status** for anything entered into PeopleSoft.

An email will be sent to you to advise of your submission.



Once reviewed by the P&W team, you will receive an email advising if the transaction has been *Approved*, *Pushed Back* or *Denied*.

If Pushed Back or denied, you will need to review and take the appropriate action.

Once approved you will see your **Status** has been changed in Employee Self Service.

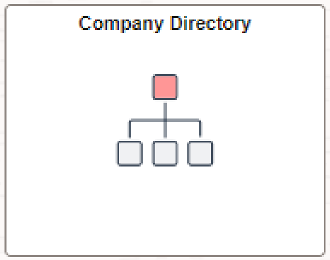
Vaccine Details

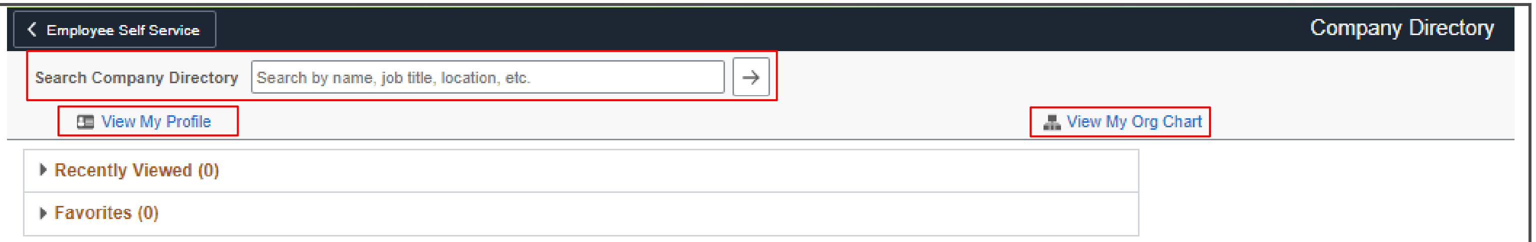
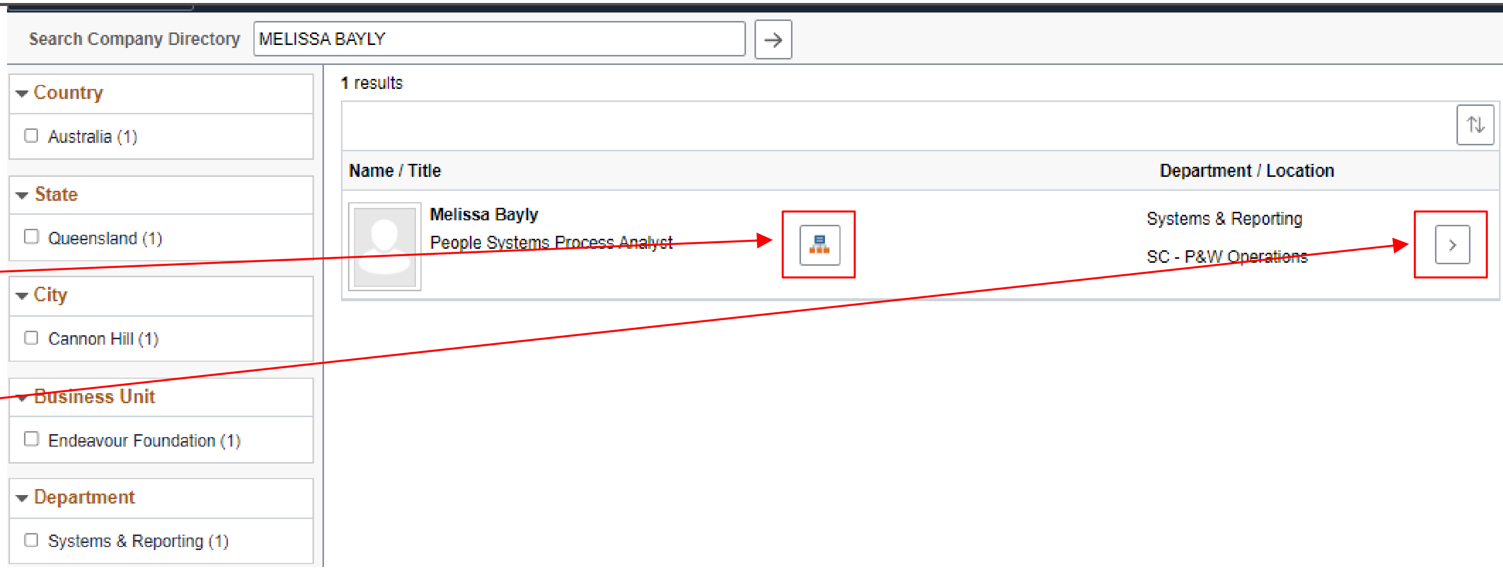
Date	Vaccine	Status
30/08/2021	Covid-19	Recorded
02/08/2021	Covid-19	Recorded

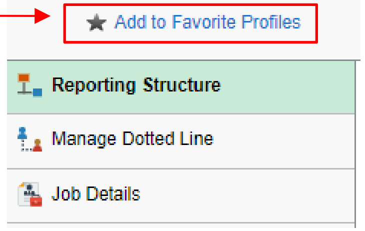
APPROVED – all details entered on the page match (including the attachment)	**PUSHBACK** – used if some details are incorrect and needs to return to the Employee to correct. Details will be available once you open up your Vaccination tile (which will display ACTION REQUIRED)	**DENY** – this will be rarely used and will only be done it the transaction requires a lot of attention and therefore a new entry would be the best option.

Company Directory

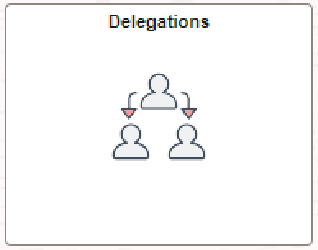
Click on the *Company Directory* button on the home screen

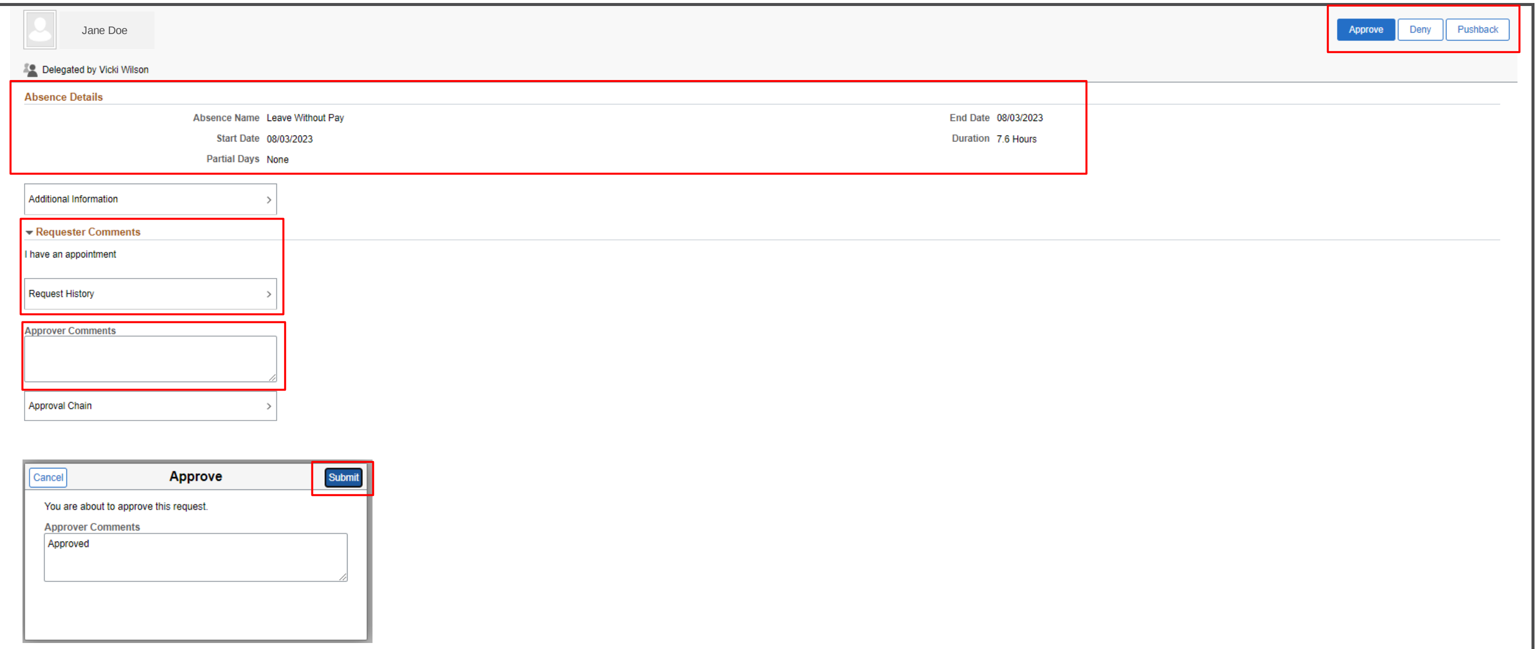


Here you can search fellow employees by employee **name**, **job title** or **location**.	 Select *View My Profile* to display your upstream **Reporting Structure** as well as your **Job Details**. Select *View My Org Chart* to display a traditional org chart view (you, your manager, and any peers).
Search the name of the person you are looking to find. On the left you can view additional information pertaining to this employees position. You can view them within the **Org Chart** OR Select **View Profile** to view **Reporting Structure**, **Directs**, **Peers**, and **Job Details**	

You can also **Add to Favourite Profiles** to save that person.	

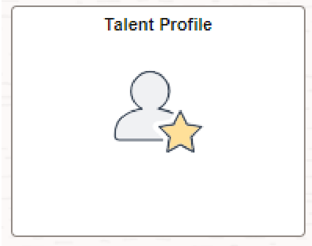
Delegations

Delegations are utilised when another user (typically a manager) wants you to act on their behalf to initiate and/or approve transactions during a short (<2 week) absence period.	
If your leader initiates a PeopleSoft delegation to you, you will be notified via email. **Note:** For the delegation to become active, and to ensure approvals flow to you and not the incumbent leader, please **accept the delegation** by clicking the link in the email > **Accept** > **Ok** as soon as you are notified.	Subject: A delegation request from Erin Henkes has been submitted for review and acceptance Erin Henkes or an administrator on behalf of Erin Henkes has submitted a delegation request to you. Here are the details: Transaction(s): Manage Approve Payable Time, Manage Reported Time, Manager Absence Request From: 2015-10-29 To: 2015-11-06 System to notify Erin Henkes of each request: N You can review the request, then accept or reject the request, using the link below. https://wi-phrtst.wi.gov/psp/phrtst/EMPLOYEE/HRMS/c/HCDL_ALL.HCDL_MGR_DLG_HOME.GBL?Page=HCDL_MGR_DLG_HOME&Action=U&DELEGATOR_ID=100024111&DELEGATOR_RCD=0&TRANSACTION_NAME=TL_SRCH_APPRV_GRP&TRANS_ALLOWED=A&FROM_DATE=2015-10-29 As a delegated authority, you will only be able to view/action transactions for applicable employees via direct links in approval email notifications or via PeopleSoft *Notifications* > *Actions* tab.

Once an approval transaction email is received follow the included link to view the transaction. View the **Absence Details**, as well as any **comments**. You will have the option to also add your own comments prior to: • *Approve* – you are about to approve this request • *Deny* – you are about to deny this request. The transaction will be cancelled. • *Pushback* – selecting pushback will send the request back to the initiator for update and resubmission Once finalised select *Submit.* You will receive an email receipt to confirm all transactions. You can review your active delegations via *Delegations > My Delegated Authorities*.	

Talent Profile

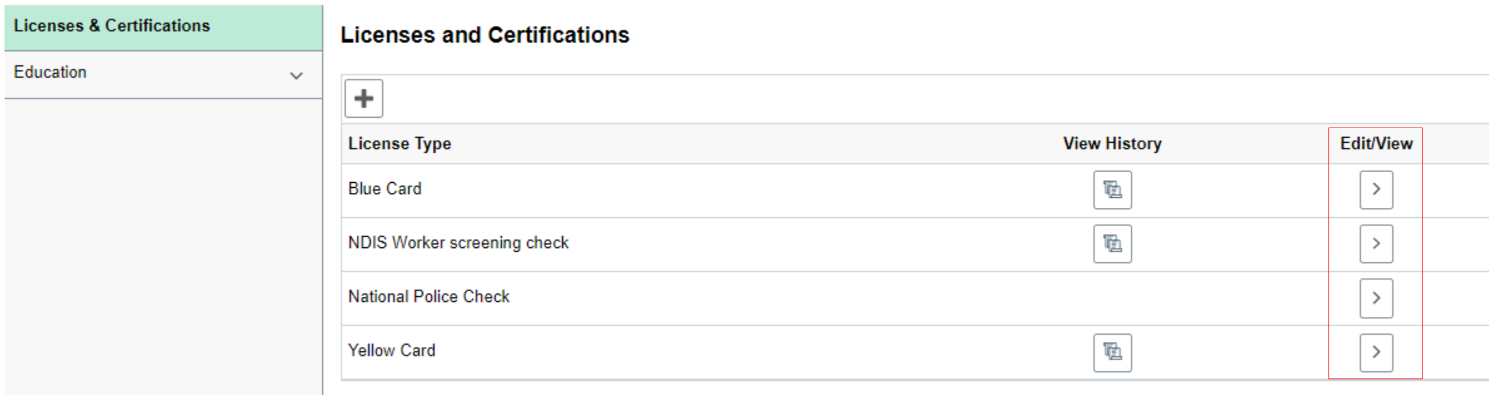
Click on *Talent Profile* to review your **Licenses and Certifications**, and **Education** information.



Licences and Certifications

Select *View History* to view item history.

To view your current licence and/or certification, click on *Edit/View*.



IMPORTANT

You **are not permitted** to make edits to the following items:

- *Blue Card*
- *NDIS Worker Screening Check*
- *National Police Check*
- *Yellow Card*

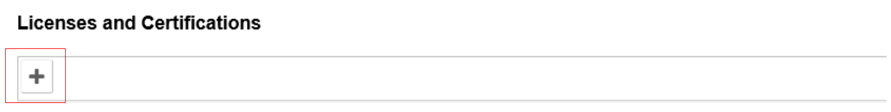
Information relating to these items is must be verified through the applicable authorities and is administered by People & Wellbeing.

If any details are incorrect or you continue to receive alerts after renewal, please submit a ticket via the #TeamPossible Support Hub.

Add/Update your Driver's / Forklift Licence

- A copy of your physical Drivers Licence must be supplied as evidence. Paper based confirmation receipts will not be accepted.
- Please ensure all details entered align exactly with the information on your licence. You will need to recommence the entire process if any errors are located.
- Follow the correct process:
    - **Add a New Licence -** your licence is not yet recorded in PeopleSoft Talent Profile, and you need to add it
    - **Update your Licence** - you already have this licence recorded in PeopleSoft Talent Profile, but it needs updating

Add a New Licence

To get started, click the add '+' symbol.	

Enter your details. The following data fields are mandatory.

Issue Date: enter the date your licence was issued here

Licence Type: click on the icon and select the applicable licence

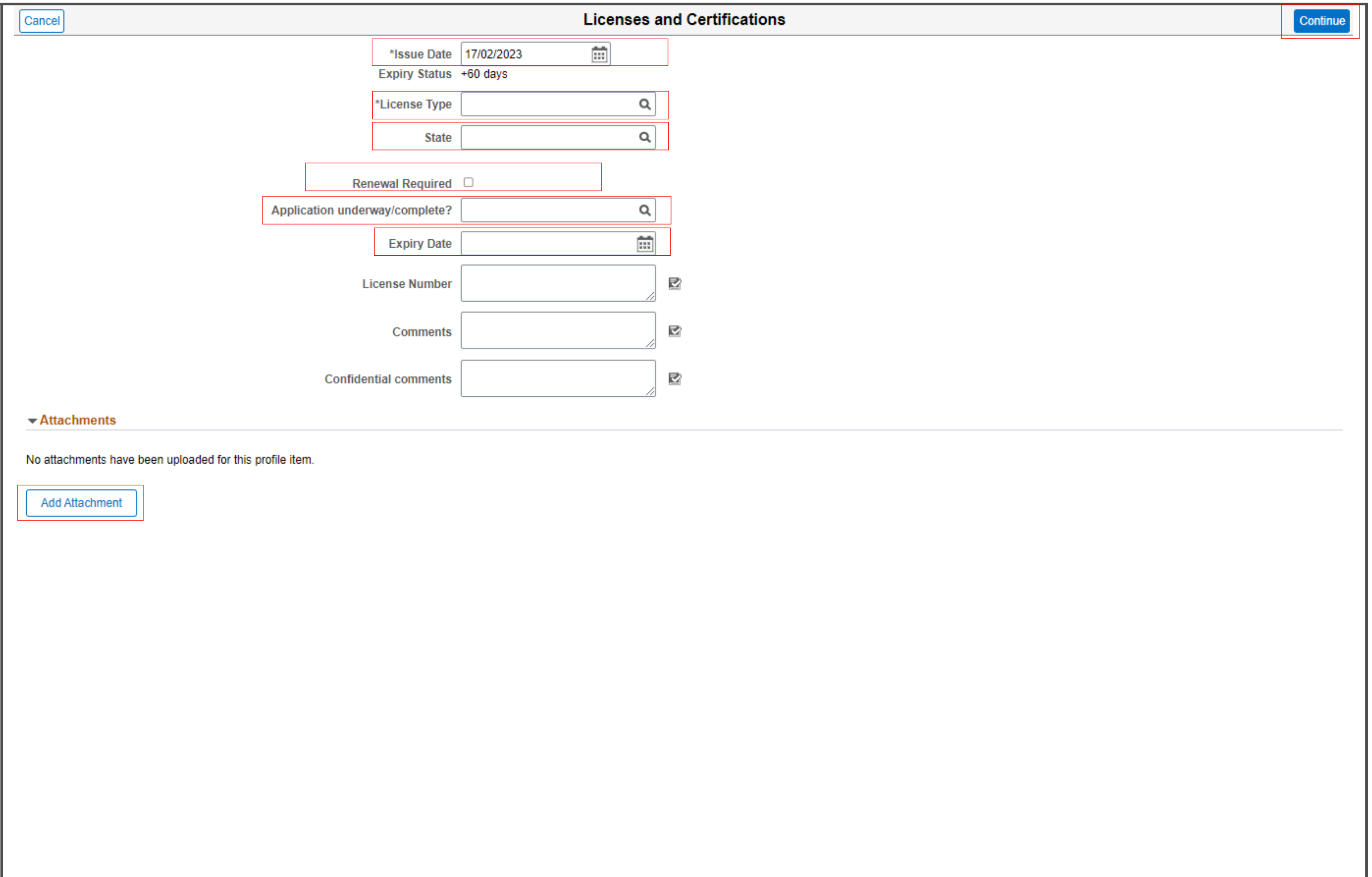
State: click on the icon and select the applicable state

Renewal Required: check the box as your licence has an expiry date

Application underway/complete: Click the click on the icon and select *Complete*

Expiry Date: enter the expiry date

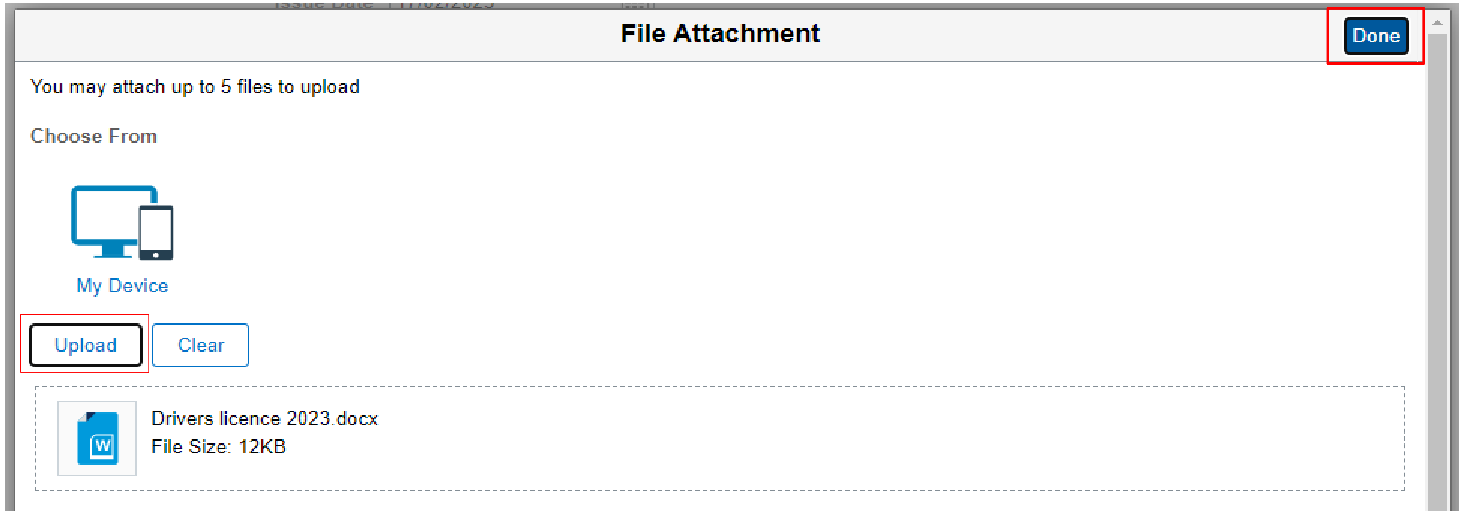
Click *Add Attachment.*



Select *My Device*, locate the attachment on your computer and **double click** to add it.

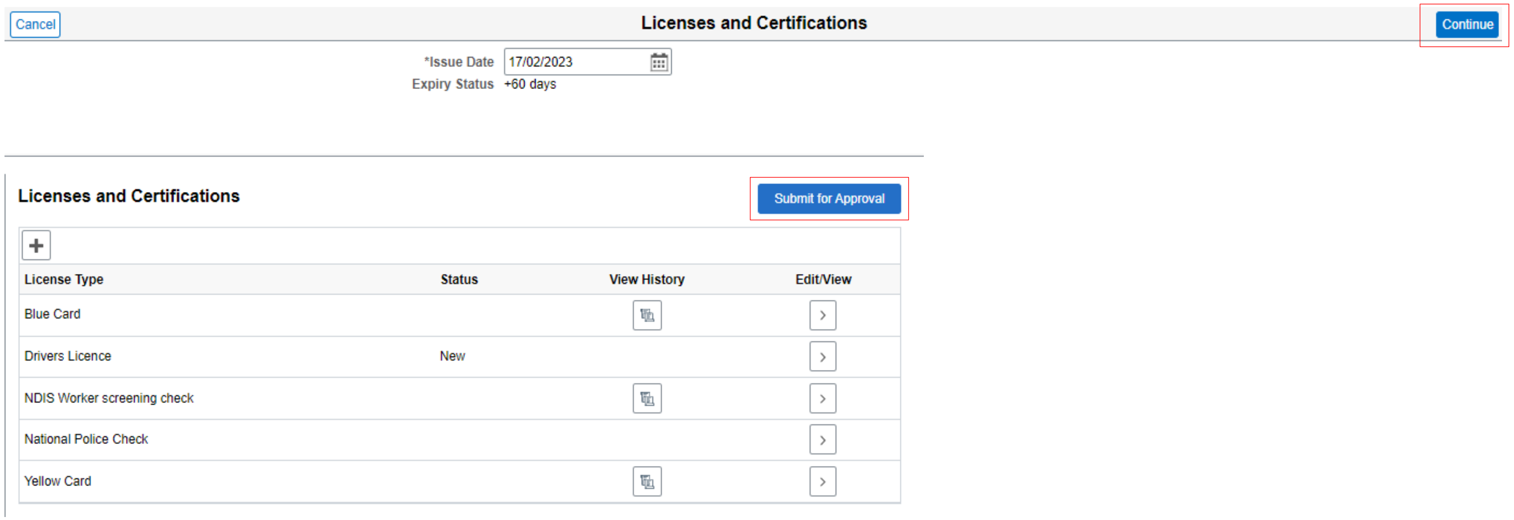
Click *Upload*. The document will now app ear in the display panel.

You can add a Description if you like, then Select *Done*.



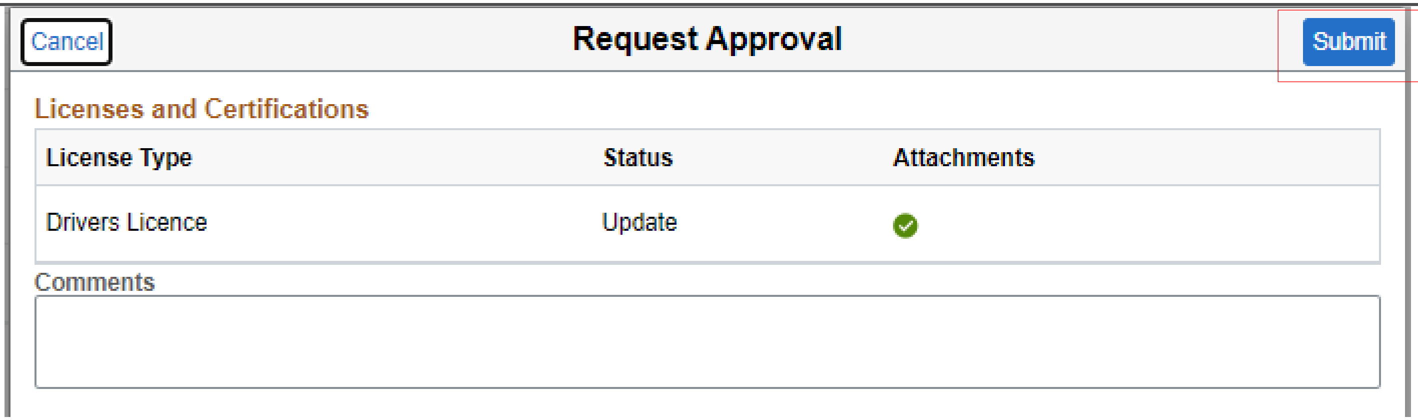
You will return to the previous screen where you need to *Continue*.

The item will now appear in your list of Licences and Certifications. Select *Submit for Approval.*

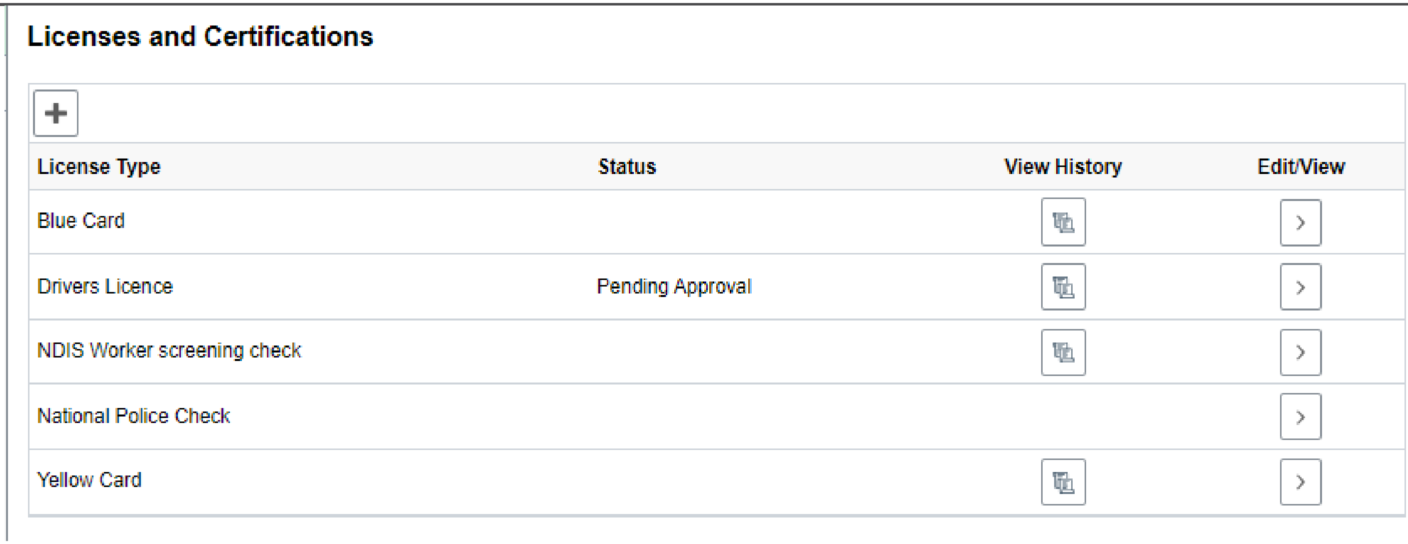


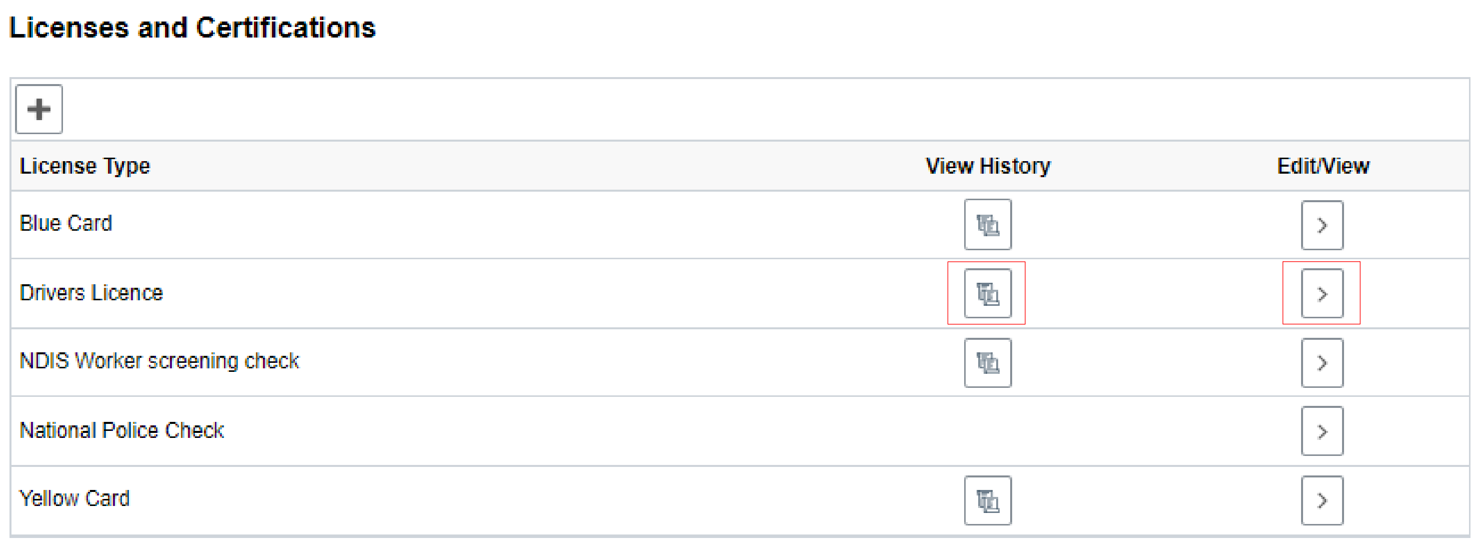
Add any comments if required and then select *Submit.*

Your **leader**, followed by **People & Wellbeing** will now be prompted to review/approve the transaction.



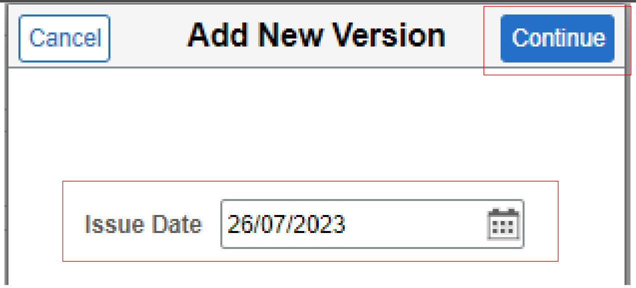
You will be returned to the Licences and Certifications screen once again. The item will be denoted with a Status = **Pending Approval**.



Once approved by your **leader**, followed by **People & Wellbeing** the item will no longer display a Status. You can view your uploads by selecting the applicable icon under **View History**, or by selecting the '>' button.	

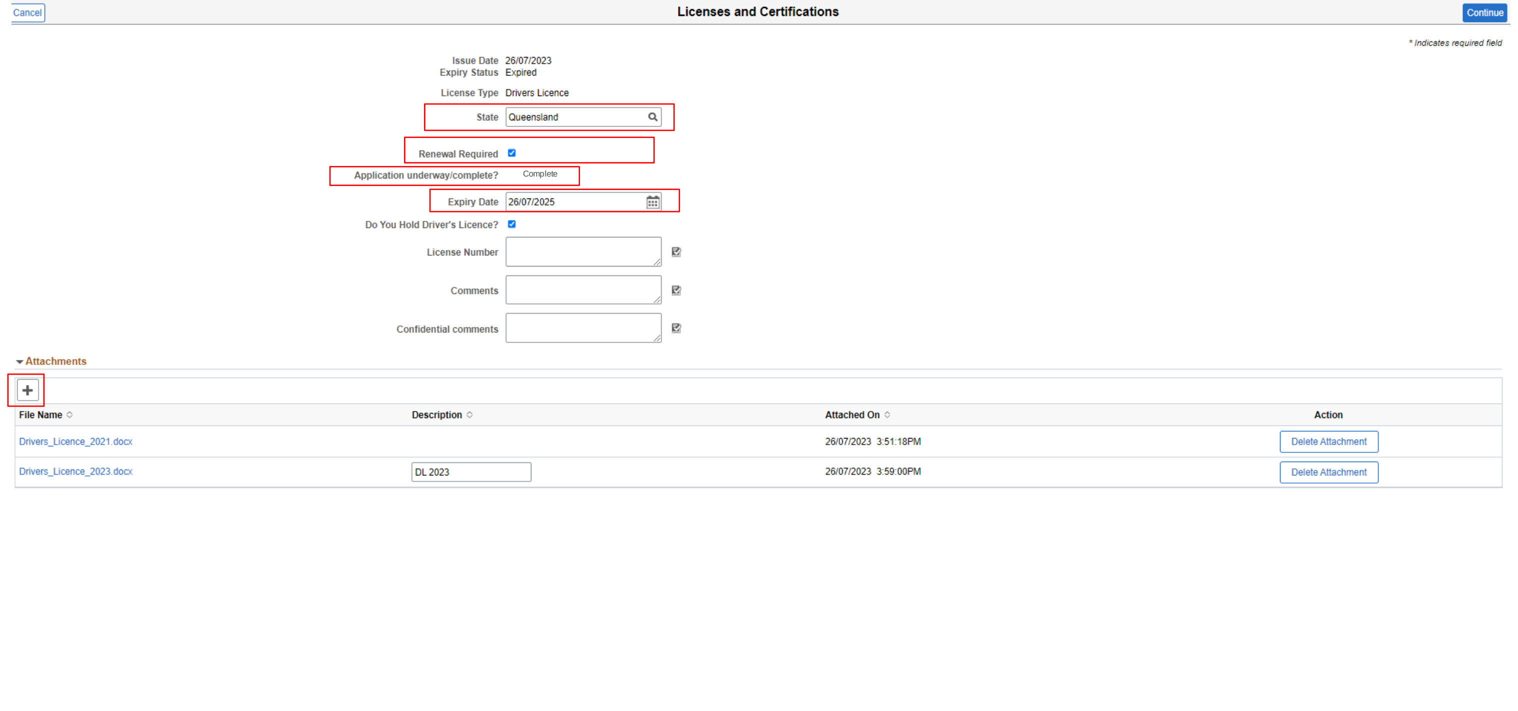
Update your Licence

To get started, locate the licence that requires updating > via Edit/View select the '>' symbol. Select *Add a New Version*.	

Enter the new **Issue Date** > select *Continue*.	

Enter your details. The following data fields are mandatory.

- **State:** click on the icon and select the applicable state
- **Renewal Required:** check the box as your licence has an expiry date
- **Application underway/complete:** Click the click on the icon and select *Complete*
- **Expiry Date:** enter the **expiry date**.
- Via Attachments click *'+'* and follow the prompts to upload a copy of your new licence.

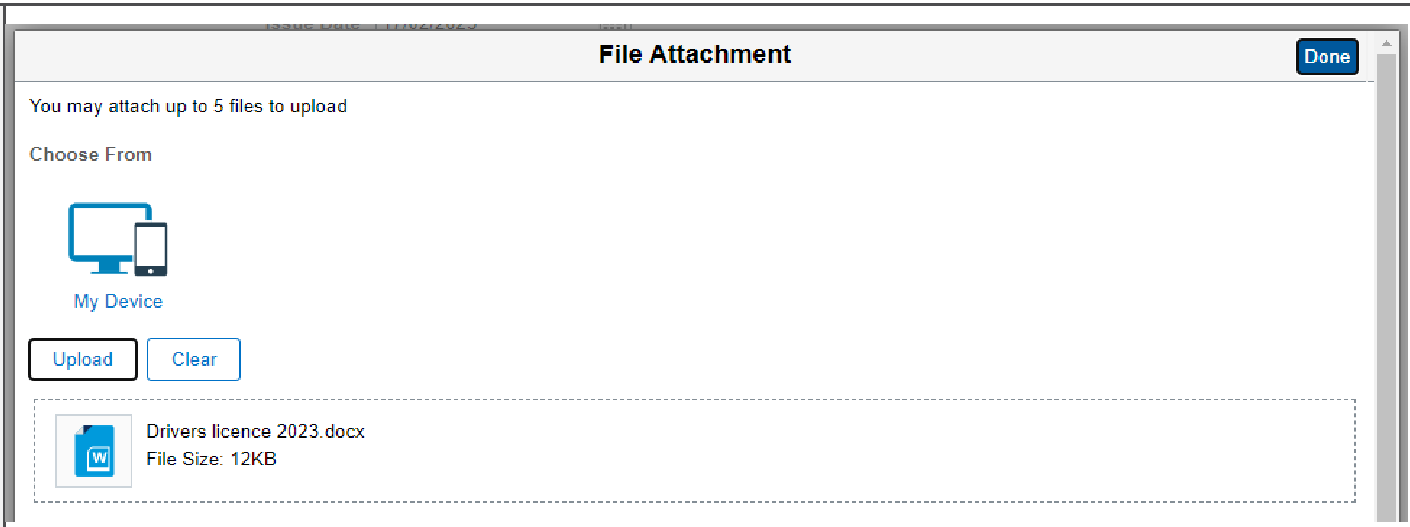


Select *My Device*, locate the attachment on your computer and **double click** to add it.

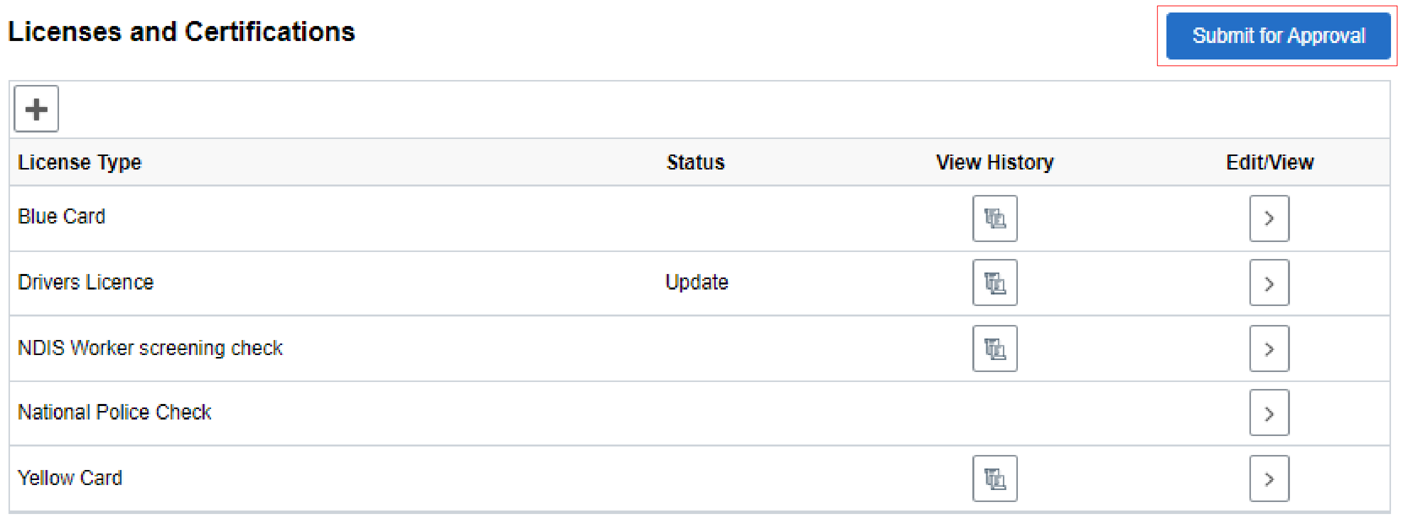
Click *Upload*. The document will now appear in the display panel.

You can add a Description if you like, then Select *Done*.

You will then return to the previous screen where you need to *Continue*.

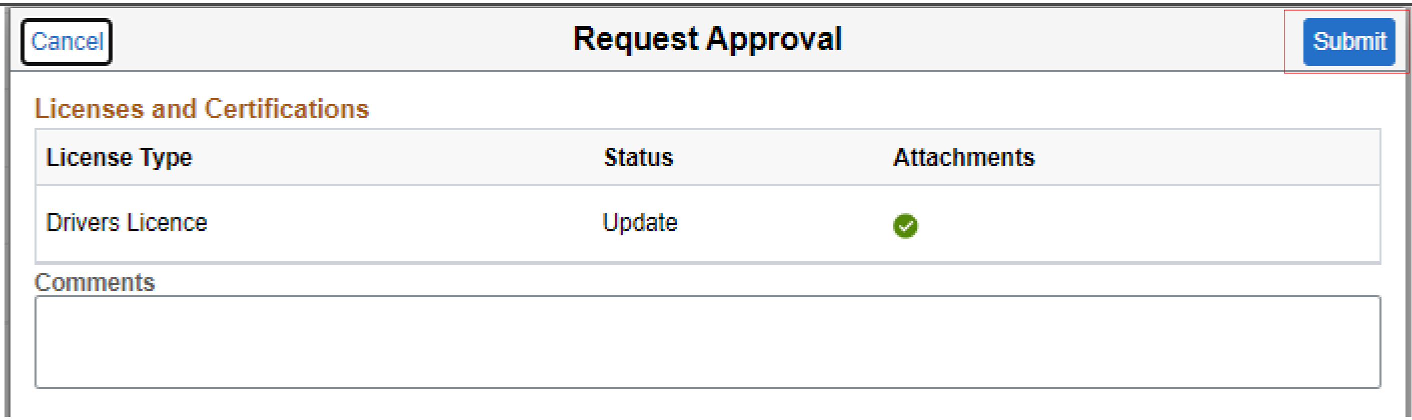


The item will now appear in your list of Licences and Certifications denoted with Status = **Update**. Select *Submit for Approval* to trigger the approval workflow.

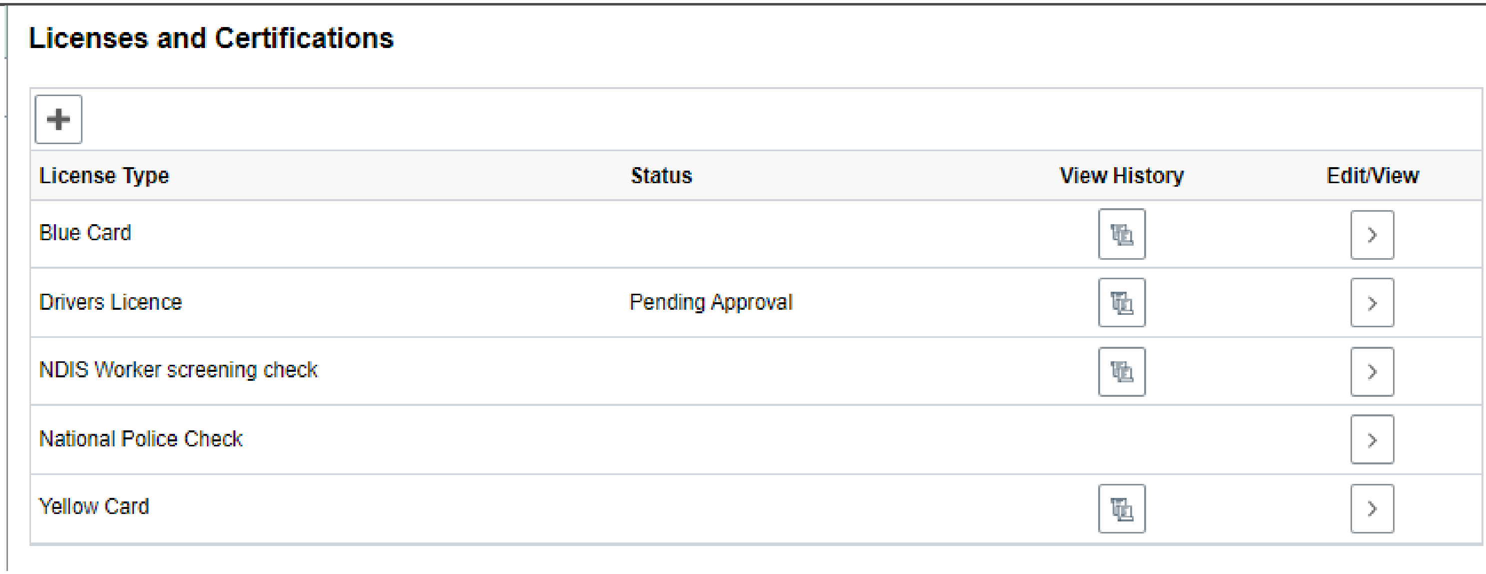


Add any **comments** if required and then select *Submit.*

Your **leader**, followed by **People & Wellbeing** will now be prompted to review/approve the transaction.

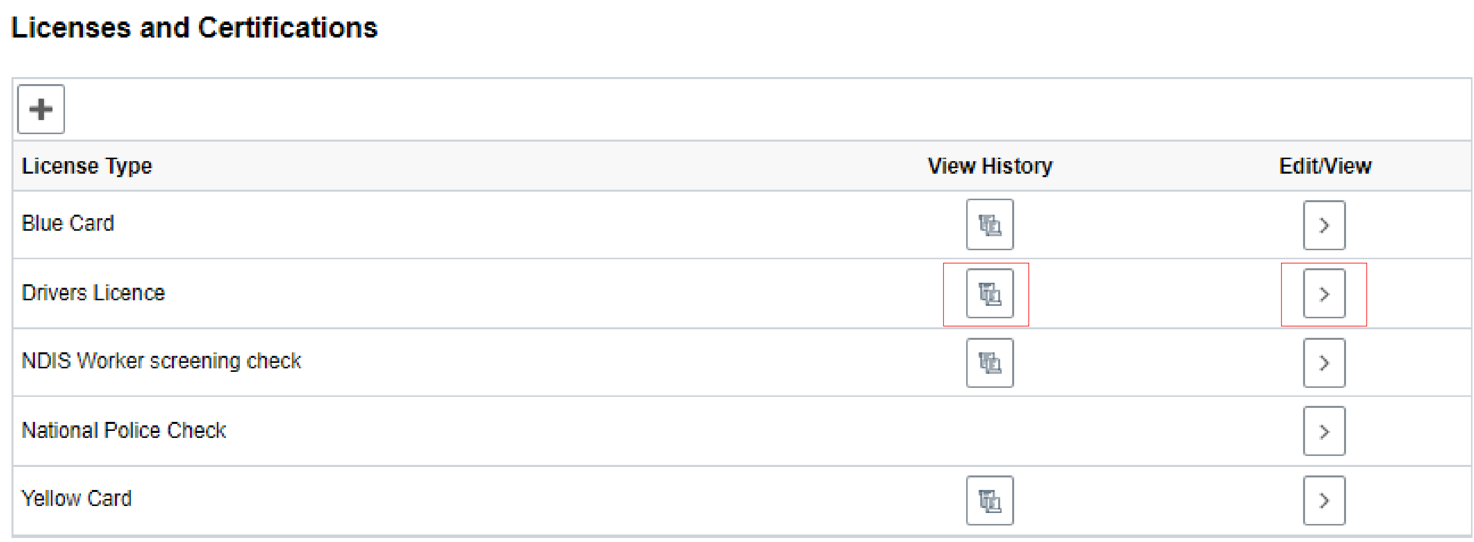


You will be returned to the Licences and Certifications screen once again. The item will be denoted with a Status = **Pending Approval**.



Once approved by your **leader**, followed by **People & Wellbeing** the item will no longer display a Status.

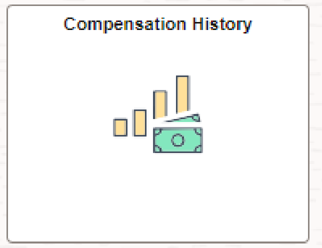
You can view your uploads by selecting the applicable icon under **View History**, or by selecting the '>' button.

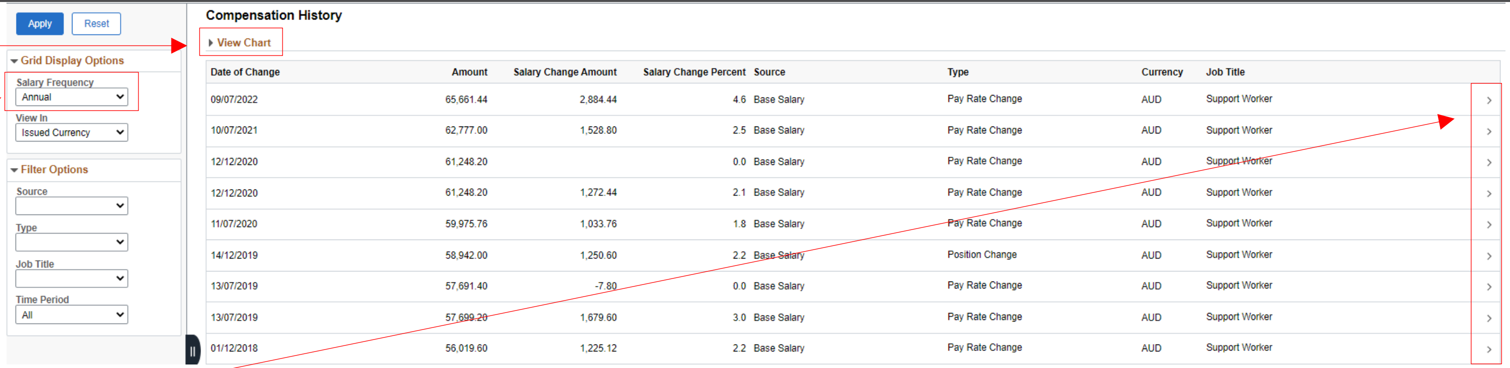

Licenses and Certifications

License Type	View History	Edit/View
Blue Card		>
Drivers Licence		>
NDIS Worker screening check		>
National Police Check		>
Yellow Card		>

Compensation History

Click on *Compensation History*.



Select **View Chart** to display your compensation data in a graphical format. Via **Salary Frequency** select Annual, *Biweekly*, *Hourly*, or *Monthly* then *Apply* to view your equivalent earnings. Items are displayed in chronological order, with the most recent displayed first. Click the '>' icon the learn more about each change.	

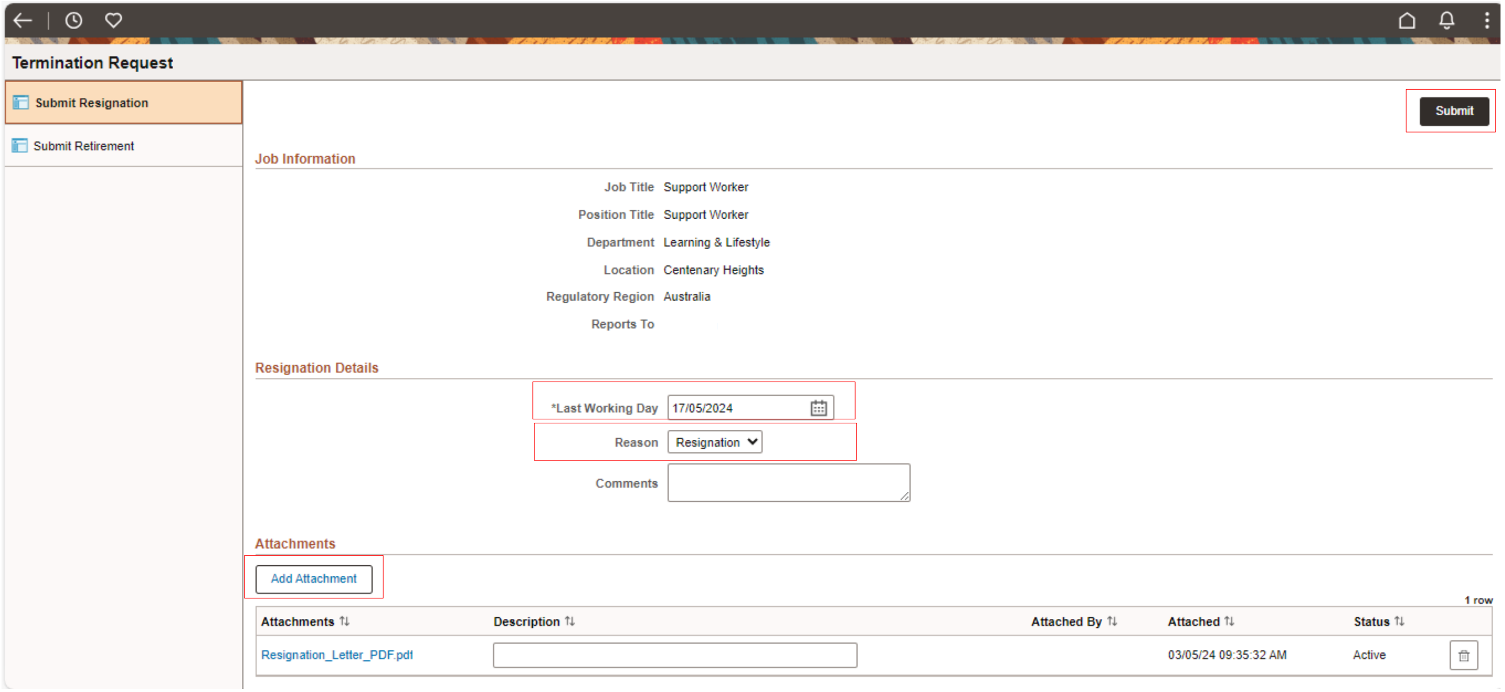
Date of Change	Amount	Salary Change Amount	Salary Change Percent	Source	Type	Currency	Job Title
09/07/2022	65,661.44	2,884.44	4.6	Base Salary	Pay Rate Change	AUD	Support Worker
10/07/2021	62,777.00	1,528.80	2.5	Base Salary	Pay Rate Change	AUD	Support Worker
12/12/2020	61,248.20		0.0	Base Salary	Pay Rate Change	AUD	Support Worker
12/12/2020	61,248.20	1,272.44	2.1	Base Salary	Pay Rate Change	AUD	Support Worker
11/07/2020	59,975.76	1,033.76	1.8	Base Salary	Pay Rate Change	AUD	Support Worker
14/12/2019	58,942.00	1,250.60	2.2	Base Salary	Position Change	AUD	Support Worker
13/07/2019	57,691.40	-7.80	0.0	Base Salary	Pay Rate Change	AUD	Support Worker
13/07/2019	57,699.20	1,679.60	3.0	Base Salary	Pay Rate Change	AUD	Support Worker
01/12/2018	56,019.60	1,225.12	2.2	Base Salary	Pay Rate Change	AUD	Support Worker

Termination Request

Leaving the organisation? Submit your termination here to commence the formal offboarding process.	

1. Validate your *Job Information* is correct
2. Enter your *Last Working Day* (last date of employment)
3. Enter your resignation *Reason*
4. Provide any comments if you wish
5. Via *Add Attachment* upload a copy of your formal resignation notification to your leader.
   Note: Acceptable formats include PDF, JPEG, PNG. Do not upload editable documents such as emails and MS Word documents directly to the system - please convert them to PDF first.
6. Select *Submit*

Once submitted, the request will then be routed both to your **leader** and then to **People & Wellbeing** for approval.



If you receive an error message when submitting your request, it's likely that the attachment is in an invalid format. Please ensure that you upload uneditable formats only e.g. PDF, JPEG, PNG. **Note:** The system will not accept email file formats.

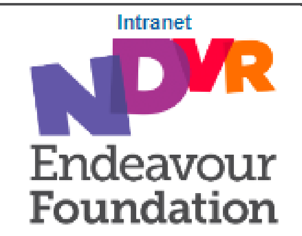
Announcements

Make sure to review this tile to see important announcements such as timesheet deadlines that you need to be aware of.	

Alerts

Click on *Alerts* for you to view upcoming expiry time periods for licences you have lodged in PeopleSoft. You will be redirected to the Talent Profile page to review your Licenses in detail.	

Intranet

Quickly access the Staff Intranet via this tile.	

More Information

Visit the intranet for helpful guides, user manuals and FAQs about navigating the improved PeopleSoft system visit our Staff Intranet > PeopleSoft

Need more help? Contact People & Wellbeing.

Submit a request via the [#TeamPossible Support Hub]

(07) 3900 5460