



# Employee Self-Service & Manager Self-Service Checklist

## BEFORE YOU GET STARTED

1. **TRAINING:** Ensure you have completed all trainings assigned to you within SuccessFactors. To verify, log into SuccessFactors> Home>Learning. Employees will continue to have access to these trainings before and after launch.
2. **JOB AIDS:** Refer to the job aids provided during training to help you navigate the new functions of PeopleSoft 9.2. They are available via SuccessFactors>Home>Jam>PeopleSoft 9.2 Job Aids. When searching for job aids in Jam, Employee Self-Service job aids start with “ESS” and “MSS” for Manager Self-Service.

## Employee Self-Service (ESS)

All ESS job aids are located in SuccessFactors>Home>Jam>PeopleSoft 9.2 Job Aids>Employee Self-Service Job Aids

1. Were you able to log into PeopleSoft HCM 9.2?
  - a. Yes – go to step 2.
  - b. No – follow these troubleshooting steps:
    - Ensure you are on the network (at work) or VPN (remote).
    - Ensure you entered the correct username and password.
    - If you still are unable to log into PS, submit an IOT ticket.
2. From your ESS Homepage, click the Time Tile and select Enter Time – are you able to enter your labored hours and save?
  - a. Yes – go to step 3.
  - b. No – follow these troubleshooting steps:
    - Select your Time Reporting Code from the drop-down option.
    - If you are a speedtype user, enter your chartfield information in the hyperlink.
    - If you are still receiving an error – contact your Manager or Agency Payroll Contact.
3. From your ESS Homepage, click the Time Tile and select the Request Absence Tile – are you able to submit leave time successfully (if needed)?
  - a. Yes, you were able to review your timesheet and see your leave time (greyed out) on your timesheet – go to step 4.
  - b. No, you were not able submit leave time on your timesheet – refer to the job aid and contact your Agency Payroll Contact.
4. Once you have entered labored hours and leave time (if necessary) for the pay period and everything is accurate, you need to submit your completed timesheet for approval by your Manager.

## Manager Self-Service (MSS)

All MSS job aids are located in SuccessFactors>Home>Jam>PeopleSoft 9.2 Job Aids>Manager Self-Service Job Aids

1. From your MSS Home Page, select the My Team tile – are all direct reports listed?
  - a. Yes, all direct reports are accurately listed – go to step 2.
  - b. No, at least one of your direct reports is missing or incorrect – you may need to have Job Data updated for their “reports-to” so refer to the job aid.
2. From your MSS Home Page, select Approvals Tile – are you able to review and approve your direct report’s timesheets?
  - a. Yes, all your direct reports are listed and their timesheets are available for review – approve time.
  - b. No, not all of your direct reports are listed with timesheets available to review:
    - Your employees may not have submitted their time – check with each employee.
    - Refer to your MSS job aids for help.
3. If your employee is not able to complete their labored hours/leave time, managers are able to complete on their behalf:
  - a. Select the Team Time tile, then Enter Time, filter by employee ID and access the employee’s timesheet to complete for **labored hours**.
  - b. Select the Team Time tile, then Request Absence, filter by employee ID and complete an absence request to complete **leave time**.
  - c. Revisit the Approvals Tile to ensure all timesheets have been approved.

