

PeopleSoft 9.1 Employee Self Service

Reference Guide



December 2, 2014

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Managing Personal and Job Data

Viewing Personal Profile Information

Navigation: Main Menu > HCM > Self Service > Personal Information > Personal Information Summary

Purpose: Use this transaction to practice viewing your personal profile information.

Personal Information Summary
 Joshua Lyman [Expand All](#) [Collapse All](#)

▼ Name
 Joshua Lyman
[Change name](#)

▼ Home/Mailing Addresses

Addresses				
Address Type	Status	As Of	Country	Address
Home	Current	10/07/2014	USA	4115 Forest Ave #2 Miami, FL 33125

[Change home/mailing addresses](#)

▼ Phone Numbers

Phone Numbers		
Phone Type	Phone Number	Preferred
Business	305/123-4567	<input checked="" type="checkbox"/>

[Change phone numbers](#)

▼ Emergency Contacts

Emergency Contacts	
Name	Relationship to Employee

[Change emergency contacts](#)

▼ Email Addresses

Step	Action
1.	<p>Use the Personal Information Summary page to review your personal information currently on file.</p> <p>This page includes such information as: Home/Mailing Addresses, Phone Numbers, Email Addresses, Instant Message IDs, Marital Status, Ethnic Groups, and Employee Information.</p> <p>Scroll down to view each section.</p>

Employee Information

Gender Male

Date of Birth 10/14/1966

Birth Country United States

Birth State Texas

Social Security Number: 499-90-9090

Smoker Non Smoker

Date Entitled to Medicare

Military Status Active Reserve

Original Start Date 05/28/2014

Highest Education Level G-Bachelor's Level Degree

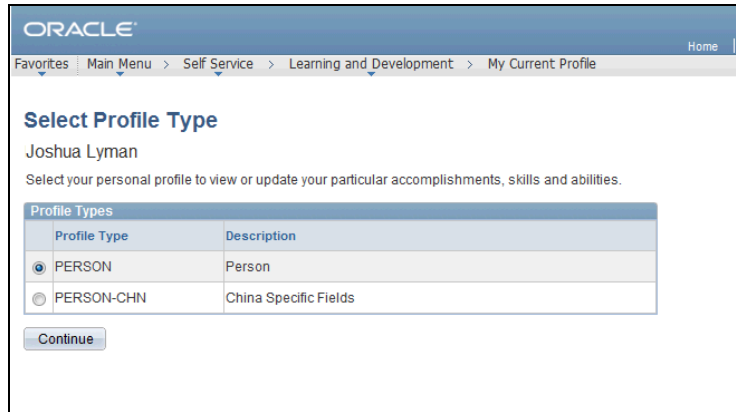
Contact the Human Resources department if any of your Employee Information is incorrect.

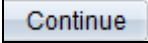
Step	Action
2.	<p>The Employee Information section displays information you provided when you were hired.</p> <p>If any of the information in this section is incorrect, contact the Human Resources Department.</p>
3.	<p>Congratulations. You have viewed your personal profile information. End of Procedure.</p>

Updating Personal Profile Information - Licenses, Certifications, and Experience

Navigation: Main Menu > HCM > Self Service > Learning and Development > My Current Profile

Purpose: Use this transaction to practice updating the following in your personal profile: licenses, certifications, and experience.



Step	Action
1.	Click the Continue button. 

ORACLE

Home | Worklist

Favorites | Main Menu > Self Service > Learning and Development > My Current Profile

My Current Person Profile

Joshua Lyman

Your profile displays skills, competencies, and accomplishments. Review content detail by navigating through the individual tabs and selecting the item description link. Content that can be updated includes an Add link below each section and an Edit and Delete button next to each item. You must use the Save button to save any profile changes. Additionally, the Submit button must be selected for any content changes requiring approval.

Profile Actions: <Select Action>

Qualifications | Education | Prior Work Experience | Performance Reviews

Add new languages in the grid below. Edit languages by selecting the edit button.

Language Skills

There are currently no Language Skills for this profile. Please add one if required.

+ Add New Language Skills

Add new licenses in the grid below. Edit licenses by selecting the edit button.

Licenses & Certifications

License	Issue Date	License Verified	Edit	Delete
Registered Nurse	01/01/2013	<input type="checkbox"/>		


+ Add New Licenses & Certifications


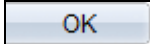
Add new Compliance in the grid below. Edit Compliance by selecting the edit button.

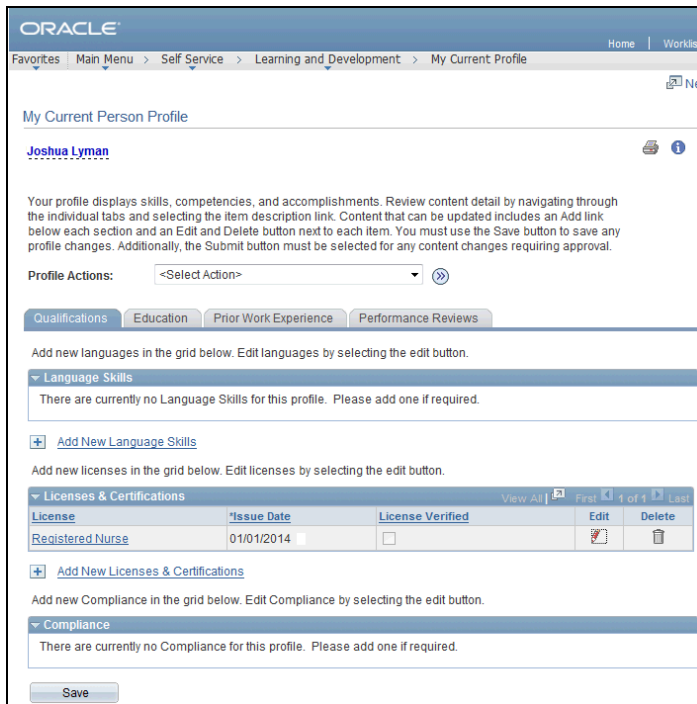
Compliance

There are currently no Compliance for this profile. Please add one if required.

Save

Step	Action
2.	Use the My Current Person Profile page to update your personal information including: License and Certifications, Education, and Prior Work Experience. In this example, you will update license and certification, and prior work experience information.
3.	Click the Edit button to update a license or certification. 

Step	Action
4.	Enter the desired information into the Issue Date field.
5.	Click the Renewal In Progress option. 
6.	Once you have finished updating, click the OK button. 



ORACLE

Home | Worklist

Favorites Main Menu > Self Service > Learning and Development > My Current Profile

My Current Person Profile

Joshua Lyman

Your profile displays skills, competencies, and accomplishments. Review content detail by navigating through the individual tabs and selecting the item description link. Content that can be updated includes an Add link below each section and an Edit and Delete button next to each item. You must use the Save button to save any profile changes. Additionally, the Submit button must be selected for any content changes requiring approval.

Profile Actions: <Select Action>

Qualifications Education **Prior Work Experience** Performance Reviews

Add new languages in the grid below. Edit languages by selecting the edit button.

Language Skills

There are currently no Language Skills for this profile. Please add one if required.

+ Add New Language Skills

Add new licenses in the grid below. Edit licenses by selecting the edit button.

Licenses & Certifications

License	Issue Date	License Verified	Edit	Delete
Registered Nurse	01/01/2014	<input type="checkbox"/>		

+ Add New Licenses & Certifications

Add new Compliance in the grid below. Edit Compliance by selecting the edit button.

Compliance

There are currently no Compliance for this profile. Please add one if required.

Save

Step	Action
7.	Next, you are going to update your work experience prior to joining Baptist Health.
8.	Click the Prior Work Experience tab.

ORACLE

Home | W

Favorites | Main Menu > Self Service > Learning and Development > My Current Profile

My Current Person Profile

[Joshua Lyman](#)

Your profile displays skills, competencies, and accomplishments. Review content detail by navigating through the individual tabs and selecting the item description link. Content that can be updated includes an Add link below each section and an Edit and Delete button next to each item. You must use the Save button to save any profile changes. Additionally, the Submit button must be selected for any content changes requiring approval.

Profile Actions: <Select Action>

Qualifications | Education | **Prior Work Experience** | Performance Reviews

Add new Previous Work Experience in the grid below. Edit Previous Work Experience by selecting the edit button.

Previous Work Experience

There are currently no Previous Work Experience for this profile. Please add one if required.

+ Add New Previous Work Experience

Save

Step	Action
9.	Click the Add New Previous Work Experience link.

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Favorites | Main Menu > Self Service > Learning and Development > My Current Profile

My Current Person Profile

Add New Previous Work Experience

Empl ID: 3888 Joshua Lyman

Profile Type: PERSON Person

Add item details. Select OK to apply changes and return. Select Cancel to return. Select Apply and Add to continue adding additional items.

Details

*Effective Date: 10/07/2014

*Content Item ID:

Verified

Previous Start Date:


Previous End Date:

Previous Employer:

Previous Job Title:

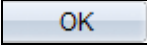
Responsibilities and Functions:

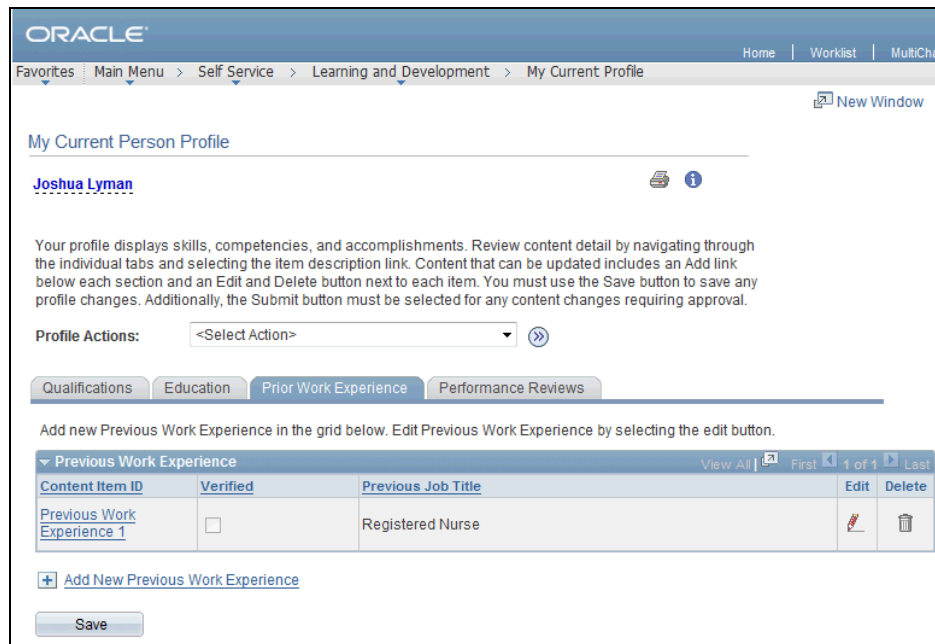
OK Apply and Add Another

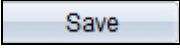
Step	Action
10.	Click the Look up Content Item ID (Alt+5) button. 

Step	Action
11.	Click the appropriate Content Item ID link.

Step	Action
12.	Enter the desired information into the Effective Date field.

Step	Action
13.	Enter the desired information into the Previous Employer field.
14.	Enter the desired information into the Previous Job Title field.
15.	Enter the desired information into the Responsibilities and Functions field.
16.	Once you have entered and updated all relevant work experience, click the OK button. 



Step	Action
17.	Click the Save button. 
18.	Congratulations. You have updated the following in your personal profile: licenses, certifications, and experience. End of Procedure.

Updating Personal Profile Information - Address

Navigation: Main Menu > HCM > Self Service > Personal Information > Home and Mailing Address

Purpose: Use this transaction to practice updating your personal profile information. In this example, you will update your home address.

ORACLE

Home | Wo

Favorites | Main Menu > Self Service > Personal Information > Home and Mailing Address

Personal Information

Home and Mailing Address

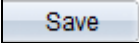
Joshua Lyman


Address Type	Status	As Of	Country	Address	Edit
Home	Current	10/07/2014	USA	4115 Forest Ave #2 Miami, FL 33125	

*Address Type:

* Required Field

Step	Action
1.	Use the Home and Mailing Address page to update current addresses and to add new addresses. In this example, you will edit a current address.
2.	Click the Edit button to the right of the address you want to update.

Step	Action
3.	Use the Edit Home Address page to update your home address and to select the date the new address becomes effective.
4.	Enter the desired information into the Effective Date field.
5.	Enter the desired information into the Address 1 field.
6.	Enter the desired information into the Address 2 field.
7.	Ensure you have updated all appropriate fields. Once you have finished updating, click the Save button. 

Step	Action
8.	Click the OK button. 



ORACLE Home | V

Favorites | Main Menu > Self Service > Personal Information > Home and Mailing Address

Personal Information

Home and Mailing Address

Joshua Lyman

Addresses					
Address Type	Status	As Of	Country	Address	Edit
Home	Current	10/07/2014	USA	4115 Forest Ave #2 Miami, FL 33125	
Home	Future	10/20/2014	USA	1041 Delta Ave #503 Miami, FL 33125	

*Address Type:

* Required Field

Step	Action
9.	Notice, you're current and future address will appear here until the effective date has passed for the new address.
10.	Congratulations. You have updated your address in your personal profile. End of Procedure.

Updating Personal Profile Information - Phone Numbers

Navigation: Main Menu > HCM > Self Service > Personal Information > Phone Numbers

Purpose: Use this transaction to practice updating your personal profile information. In this example, you will update your phone number.

ORACLE

Favorites Main Menu > Self Service > Personal Information > Phone Numbers

Personal Information

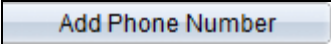
Phone Numbers

Joshua Lyman

Enter your phone numbers below.

Phone Numbers				
Phone Type	*Telephone	Extension	Preferred	Delete
Business	305/123-4567		<input checked="" type="checkbox"/>	

* Required Field

Step	Action
1.	Use the Phone Numbers page to update current numbers and add new numbers. In this example, you will add a new phone number.
2.	Click the Add Phone Number button. 

ORACLE Home

Favorites Main Menu > Self Service > Personal Information > Phone Numbers

Personal Information

Phone Numbers

Joshua Lyman

Enter your phone numbers below.

Phone Type	*Telephone	Extension	Preferred	Delete
Business	305/123-4567		<input checked="" type="checkbox"/>	
			<input type="checkbox"/>	

* Required Field

Step	Action
3.	Click the button to the right of the Phone Type field.

ORACLE Home

Favorites Main Menu > Self Service > Personal Information > Phone Numbers

Personal Information

Phone Numbers

Joshua Lyman

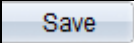
Enter your phone numbers below.

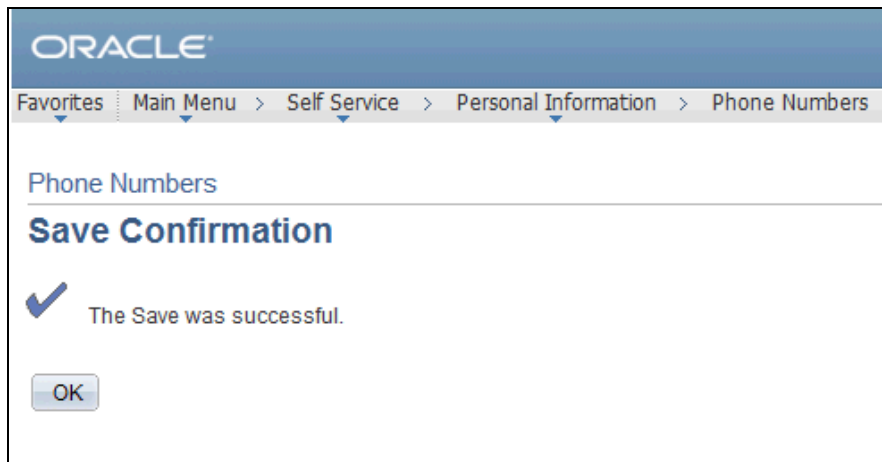
Phone Type	*Telephone	Extension	Preferred	Delete
Business	305/123-4567		<input checked="" type="checkbox"/>	
			<input type="checkbox"/>	


Campus
Dormitory
FAX
Home
Main
Mobile
Mobile 2
Other
Pager 1
Pager 2
Telex
Work

Number

Step	Action
4.	Click the appropriate Phone Type list item.

Step	Action
5.	Enter the desired information into the Telephone field.
6.	To select a preferred phone number, click the preferred option to the right of the appropriate phone number.
7.	To delete a phone number, click the delete icon to the right of the appropriate phone number.
8.	Click the Save button. 

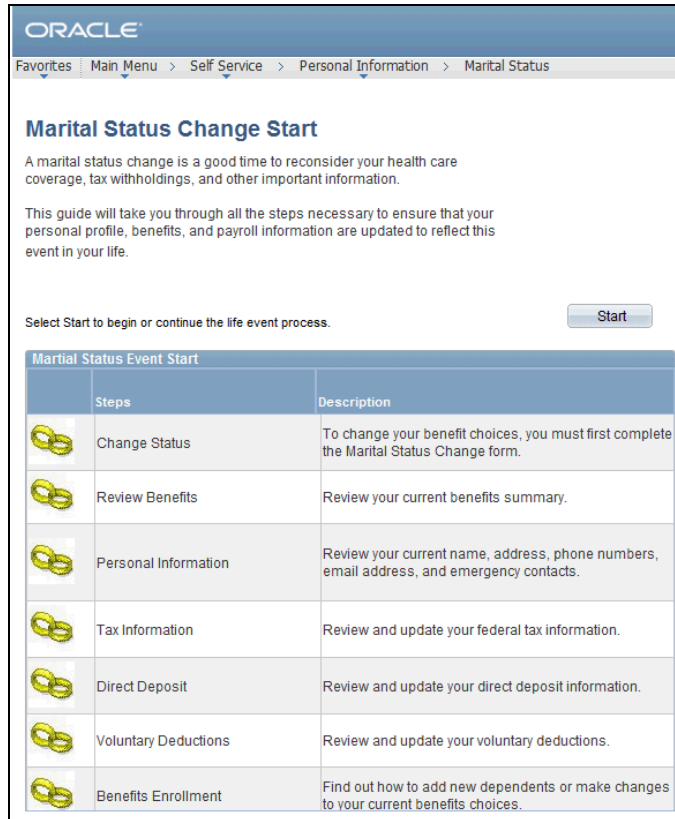


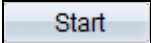
Step	Action
9.	Click the OK button. 
10.	Congratulations. You have updated your phone number in your personal profile. End of Procedure.

Updating Personal Profile Information - Marital Status

Navigation: Main Menu > HCM > Self Service > Personal Information > Marital Status

Purpose: Use this transaction to practice updating your personal information. In this example, you will update marital status.



Step	Action
1.	To change your marital status, you will be taken through a series of pages by the system. These pages will allow you to change your status, review your current benefits, your personal information, your tax information, direct deposit, and voluntary deductions. Finally, a change in marital status may allow you to add new dependents or make changes to your benefits choices.
2.	Click the Start button to begin. 

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Favorites | Main Menu > Self Service > Personal Information > Marital Status

Marriage Life Event

Change Status | Review Benefits | Personal Information | Tax Information | Direct Deposit

1-5 of 7

Marital Status Change

Joshua Lyman

Fill in the following information and click the Submit button.

*Date Change Will Take Effect: 10/09/2014

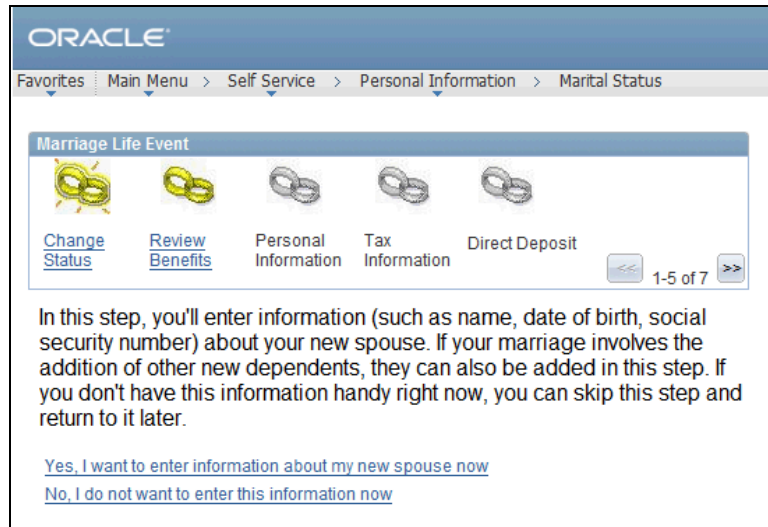
Current Marital Status: Single

*Change Marital Status To: Married

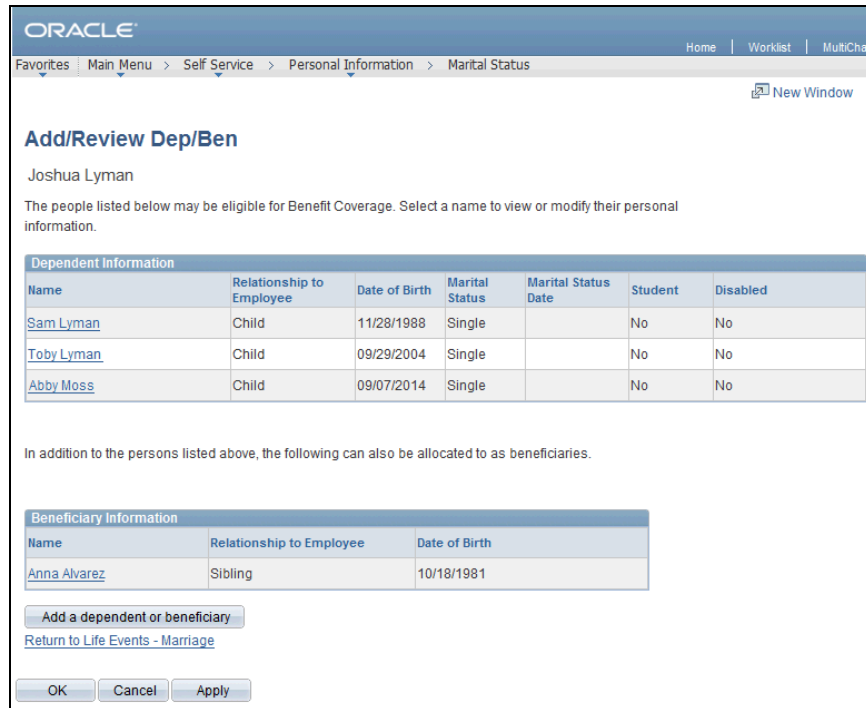
* Required Field

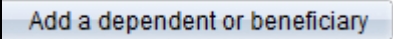
Submit | Back | Next

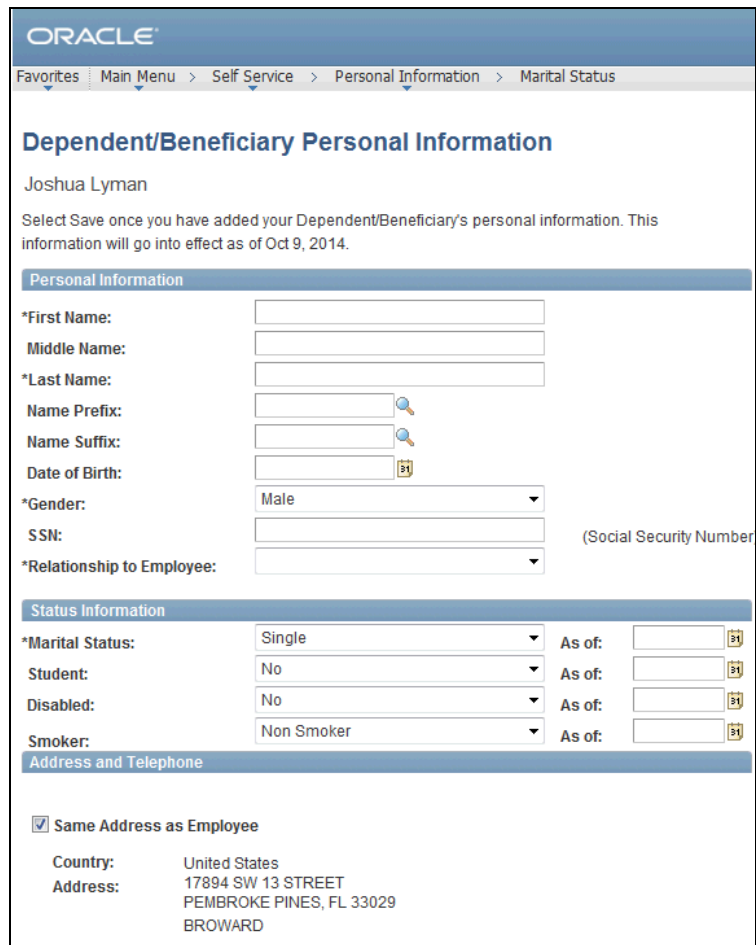
Step	Action
3.	<p>The system guides you through the required sub-steps or action items to complete the life event.</p> <p>An activity guide pagelet, here the Marriage Life Event pagelet, lists all the steps you need to complete. The status of each action item in the pagelet changes as you navigate through the event. Buttons available on each action item page enables easy navigation through the items, as well as to stop processing a life event temporarily and continue at a later point, or to cancel/delete the life event.</p> <p>When you complete a life event, the activity guide pagelet provides a visual indication that all the action items are complete.</p>
4.	Enter the desired information into the Date Change Will Take Effect field.
5.	<p>Select the appropriate Change Marital Status To item.</p> <p>In this example, marital status is changing from Single to Married.</p>
6.	<p>Click the Submit button.</p> <p>Submit</p>



Step	Action
7.	Next, if you have the information available, you will enter information about your new spouse. If your marriage involves new dependents, you can also add them in this step. If you do not have the information available, you can return to this step later.
8.	Click the Yes, I want to enter information about my new spouse now link.



Step	Action
9.	Click the Add a dependent or beneficiary button. 



ORACLE

Favorites | Main Menu > Self Service > Personal Information > Marital Status

Dependent/Beneficiary Personal Information

Joshua Lyman


Select Save once you have added your Dependent/Beneficiary's personal information. This information will go into effect as of Oct 9, 2014.


Personal Information


*First Name:


Middle Name:

*Last Name:

Name Prefix: 

Name Suffix: 



Date of Birth: 



*Gender: 



SSN: (Social Security Number)



*Relationship to Employee:

Status Information

*Marital Status:  As of: 

Student:  As of: 

Disabled:  As of: 


Smoker:  As of: 

Address and Telephone

Same Address as Employee

Country: United States
Address: 17894 SW 13 STREET
PEMBROKE PINES, FL 33029
BROWARD

Step	Action
10.	Use the Dependent/Beneficiary Personal Information page to enter your new spouse's information.
11.	Enter the desired information into the First Name field.
12.	Enter the desired information into the Last Name field.
13.	Enter the desired information in the Date of Birth field.

Step	Action
14.	Click the button to the right of the Gender field. 

ORACLE

Favorites | Main Menu > Self Service > Personal Information > Marital Status

Dependent/Beneficiary Personal Information

Joshua Lyman

Select Save once you have added your Dependent/Beneficiary's personal information. This information will go into effect as of Oct 9, 2014.

Personal Information

*First Name: Donna
 Middle Name:
 *Last Name: Moss
 Name Prefix:
 Name Suffix:
 Date of Birth: 05/06/1968
 *Gender: Male
 SSN: (Social Security Number)
 *Relationship to Employee: Unknown


Status Information

*Marital Status: Single As of:
 Student: No As of:
 Disabled: No As of:
 Smoker: Non Smoker As of:

Address and Telephone

Same Address as Employee

Country: United States
 Address: 17894 SW 13 STREET
 PEMBROKE PINES, FL 33029
 BROWARD

Step	Action
15.	Click the appropriate Gender list item.
16.	If you do not know the Social Security Number, or your spouse does not have one, you can leave this blank. After saving their information, you will be asked for a reason why there is no Social Security Number listed.
17.	Enter the desired information into the SSN field.
18.	Click the button to the right of the Relationship to Employee field. 

ORACLE

Favorites Main Menu > Self Service

Dependent/Beneficiary

Joshua Lyman

Select Save once you have added information will go into effect as of

Personal Information

*First Name: _____
 Middle Name: _____
 *Last Name: _____
 Name Prefix: _____
 Name Suffix: _____
 Date of Birth: _____
 *Gender: _____
 SSN: _____ (Social Security Number)
 *Relationship to Employee: **Stepchild**

Status Information

*Marital Status: Single As of: _____
 Student: No As of: _____
 Disabled: No As of: _____
 Smoker: Non Smoker As of: _____

Address and Telephone

Step	Action
19.	Click the appropriate Relationship to Employee list item.
20.	Click the button to the right of the Marital Status field. <input type="button" value="▼"/>

ORACLE

Favorites | Main Menu > Self Service > Personal Information > Marital Status

Dependent/Beneficiary Personal Information

Joshua Lyman

Select Save once you have added your Dependent/Beneficiary's personal information. This information will go into effect as of Oct 9, 2014.

Personal Information

*First Name: Donna
 Middle Name:
 *Last Name: Moss
 Name Prefix:
 Name Suffix:
 Date of Birth: 05/06/1968
 *Gender: Female
 SSN: 585-55-8855 (Social Security Number)
 *Relationship to Employee: Spouse

Status Information

*Marital Status: Single As of:
 Student: As of:
 Disabled: As of:
 Smoker: As of:
 Address and Telephone: Head of Household, Married, Separated
 Same Address as Employee: Single, Surviving Civil Partner, Unknown, Widowed
 Country: United States
 Address: 17894 SW

Step	Action
21.	Click the appropriate Marital Status list item.
22.	Enter the appropriate information in the As Of field.
23.	Notice, the Smoker status defaults to Non Smoker. You are responsible for updating this field if your spouse/dependent does smoke. In this example, you do not need to change the smoker status.
24.	Scroll down the page.

ORACLE

Favorites | Main Menu > Self Service > Personal Information > Marital Status

*Last Name: Moss

Name Prefix:

Name Suffix:

Date of Birth: 05/06/1968

*Gender: Female

SSN: 585-55-8855 (Social Security Number)

*Relationship to Employee: Spouse

Status Information

*Marital Status: Married As of: 10/09/2014

Student: No As of:

Disabled: No As of:

Smoker: Non Smoker As of:

Address and Telephone


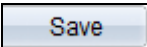
Same Address as Employee

Country: United States
Address: 716 NW 67 STREET
WAYWARD PINES, FL 33029
BROWARD

Same Phone as Employee

Phone:

Save

Step	Action
25.	In the Address and Telephone section, click the Same Address as Employee option if your spouse has the same address and/or phone number. Deselect the option to enter a different address or telephone number.
26.	Click the Same Phone as Employee option. 
27.	Click the Save button. 

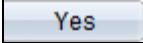
Message

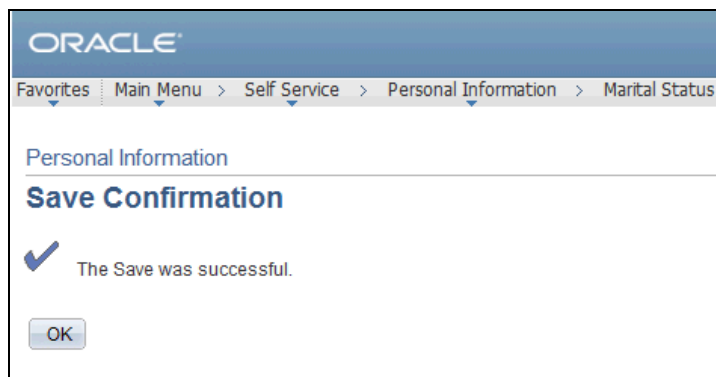
Please certify this dependent's use of tobacco products. (21004,4)


You are certifying that your response in regards to the use of tobacco products by this dependent is truthful. In order to be eligible for the Non-Smoker rates, neither you nor any of your dependents over the age of 18 can use tobacco products.

I understand the requirements for my dependent regarding their use of tobacco products. You cannot Save this dependent's information until you select 'Yes'.

Yes No

Step	Action
28.	<p>Click the Yes button if the selected Smoker status is accurate. Click No to return and make any necessary edits.</p> <p>In this example, click the Yes button.</p> 



Step	Action
29.	<p>Click the OK button.</p> 



Step	Action
30.	<p>Click the Return to Dependent/Beneficiary Summary link.</p>

Add/Review Dep/Ben

Joshua Lyman

The people listed below may be eligible for Benefit Coverage. Select a name to view or modify their personal information.

Dependent Information						
Name	Relationship to Employee	Date of Birth	Marital Status	Marital Status Date	Student	Disabled
Sam Lyman	Child	11/28/1988	Single		No	No
Toby Lyman	Child	09/29/2004	Single		No	No
Abby Moss	Child	09/07/2014	Single		No	No
Donna Moss	Spouse	05/06/1968	Married	10/09/2014	No	No

In addition to the persons listed above, the following can also be allocated to as beneficiaries.

Beneficiary Information		
Name	Relationship to Employee	Date of Birth
Anna Alvarez	Sibling	10/18/1981

[Add a dependent or beneficiary](#)

[Return to Life Events - Marriage](#)

Step	Action
31.	Click the Return to Life Events - Marriage link.

ORACLE

Favorites | Main Menu > Self Service > Personal Information > Marital Status

Marriage Life Event

[Change Status](#)
[Review Benefits](#)
[Personal Information](#)
[Tax Information](#)
[Direct Deposit](#)

1-5 of 7

[Click here to continue with your Life Event](#)

[Back](#) [Next](#)

Step	Action
32.	Click the Click here to continue with your Life Event link.

ORACLE

Favorites | Main Menu > Self Service > Personal Information > Marital Status

Marriage Life Event

Change Status Review Benefits Personal Information Tax Information Direct Deposit

1-5 of 7

Marital Status Change

Joshua Lyman

Fill in the following information and click the Submit button.

*Date Change Will Take Effect: 10/09/2014

Current Marital Status: Single

*Change Marital Status To: Married

* Required Field

Submit Back Next

Step	Action
33.	Click the Next button.

Marriage Life Event

Change Status Review Benefits Personal Information Tax Information Direct Deposit

1-5 of 7

Benefits Summary

Joshua Lyman

To view your benefits as of another date, enter the date and select Go.

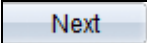
10/09/2014 Go

Type of Benefit	Plan Description	Coverage or Participation
Medical	AvMed Health Plan	Employee + Child(ren)
Dental	MetLife SafeGuard Basic Plus	Family
Vision	CompBenefits Vision Care Plan	Employee + 1 Depend
Legal Services		Waived
Basic Life	Basic Life	\$10,000
Supplemental Life		Waived
Basic ADD	Basic AD&D	\$10,000
Dependent Life - Child		Waived
Supplemental AD and D		Waived
Dependent Life Spouse		Waived
Business Travel Insurance	Business Travel	\$500,000

Done

Step	Action
34.	Use the Benefits Summary page to review your current benefits. Note, you can only review your benefits on this page.
35.	Scroll down the page.

Benefits Summary		
Type of Benefit	Plan Description	Coverage or Participation
Medical	AvMed Health Plan	Employee + Child(ren)
Dental	MetLife SafeGuard Basic Plus	Family
Vision	CompBenefits Vision Care Plan	Employee + 1 Depend
Legal Services		Waived
Basic Life	Basic Life	\$10,000
Supplemental Life		Waived
Basic ADD	Basic AD&D	\$10,000
Dependent Life - Child		Waived
Supplemental AD and D		Waived
Dependent Life Spouse		Waived
Business Travel Insurance	Business Travel	\$500,000
Short-Term Disability	Short Term Disability	60% of Salary
Long-Term Disability	Long Term Disability Non-Mgmt	60% of Salary
403(b)		Waived
PTO	Non-Mgmt PTO 0-15 yrs	-----

Step	Action
36.	Click the Next button. 

Marriage Life Event

Change Status Review Benefits Personal Information Tax Information Direct Deposit 1-5 of 7

Personal Information Summary

Joshua Lyman [Expand All](#) [Collapse All](#)

▼ Name
Joshua Lyman
[Change name](#)

▼ Home/Mailing Addresses

Address Type	Status	As Of	Country	Address
Home	Current	07/02/2002	USA	716 NW 67 STREET WAYWARD PINES, FL BROWARD

[Change home/mailing addresses](#)

▼ Phone Numbers

Phone Type	Phone Number	Preferred
Business	786/662-5180	<input type="checkbox"/>
Home	954/392-1159	<input type="checkbox"/>
Main	954/392-1159	<input checked="" type="checkbox"/>

Step	Action
37.	Use the Personal Information Summary page to review your current personal information. You can also use this page if you need to update your personal information as a result of the life event.
38.	Scroll down the page.

▼ Employee Information

Gender Male

Date of Birth 12/26/1964

Birth Country United States

Birth State

Social Security Number: 162-62-2222

Smoker

Date Entitled to Medicare

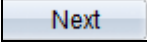
Military Status

Original Start Date 07/02/2002

Highest Education Level A-Not Indicated

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

[Back](#) [Next](#)

Step	Action
39.	<p>In this example, there are no edits.</p> <p>Click the Next button.</p> 



The screenshot shows the Oracle Self Service interface. The breadcrumb trail is: Favorites | Main Menu > Self Service > Personal Information > Marital Status. The page features a 'Marriage Life Event' section with five ring icons and links for 'Change Status', 'Review Benefits', 'Personal Information', 'Tax Information', and 'Direct Deposit'. Below this is the 'W-4 Tax Information' section for Joshua Lyman, with a Social Security Number of 162-62-2222 and employer South Miami Hospital. A paragraph explains the purpose of the W-4 form, and another notes that IRS rules regarding allowances are subject to review. At the bottom, the 'Home Address' is listed as 716 NW 67 STREET, WAYWARD PINES, FL 33029.

Step	Action
40.	Use the W-4 Tax Information page to review and edit your W-4 Tax Data including marital status, number of allowances, and any additional money to be withheld.
41.	Scroll down the page.

W-4 Tax Data

Enter total number of Allowances you are claiming:

Enter Additional Amount, if any, you want withheld from each paycheck:

Indicate Marital Status: Single Married

Check here and select Single status if married but withholding at single rate.
 Note: If married, but legally separated, or spouse is a nonresident alien, select 'Single' status.

Check here if your last name differs from that shown on your social security card.
 You must call 1-800-772-1213 for a new card.

Claim Exemption

I claim exemption from withholding for the year and I certify that I meet BOTH of the following conditions for exemption:

1. Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability.
2. This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.

Check this box if you meet both conditions to claim exempt status.

Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

Step	Action
42.	Click the Next button. <input type="button" value="Next"/>






ORACLE

Home | Worklist | M

Favorites | Main Menu > Self Service > Personal Information > Marital Status

New Window

Marriage Life Event

[Change Status](#) [Review Benefits](#) [Personal Information](#) [Tax Information](#) [Direct Deposit](#)

<< 1-5 of 7 >>

Direct Deposit

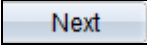
Joshua Lyman

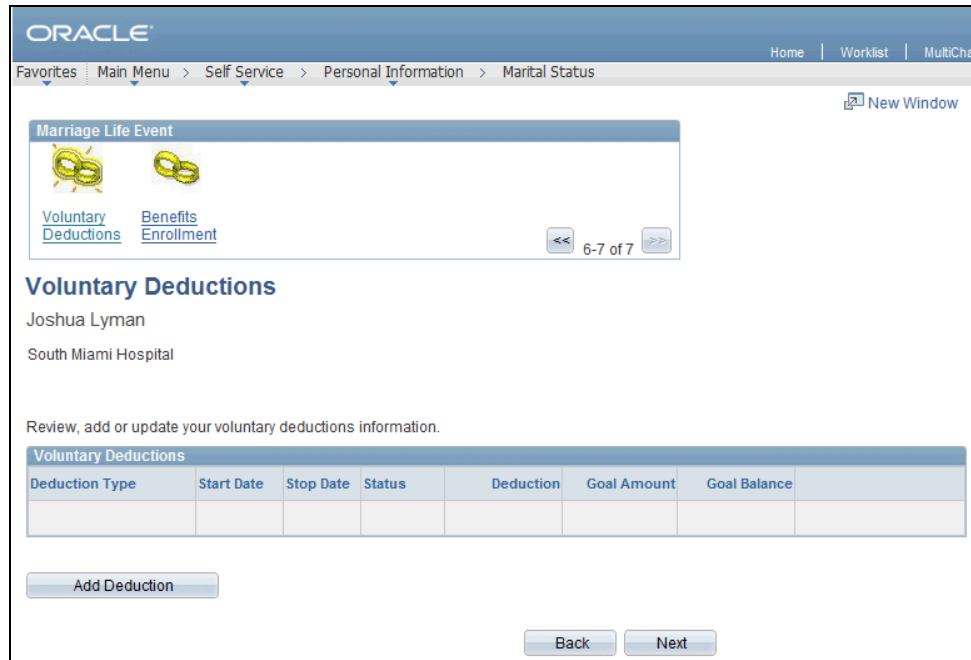
Review, add or update your direct deposit information.

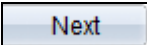
Direct Deposit Detail

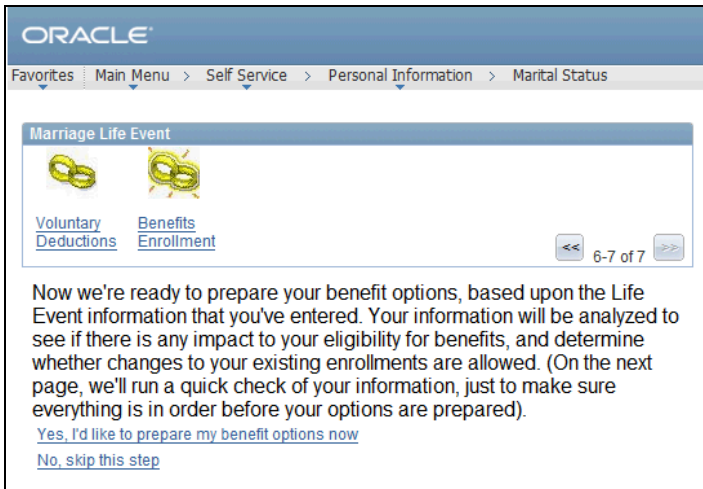
Account Type	Routing Number	Account Number	Deposit Type	Amount or Deposit Percent Order		

Pay Statement Print Option

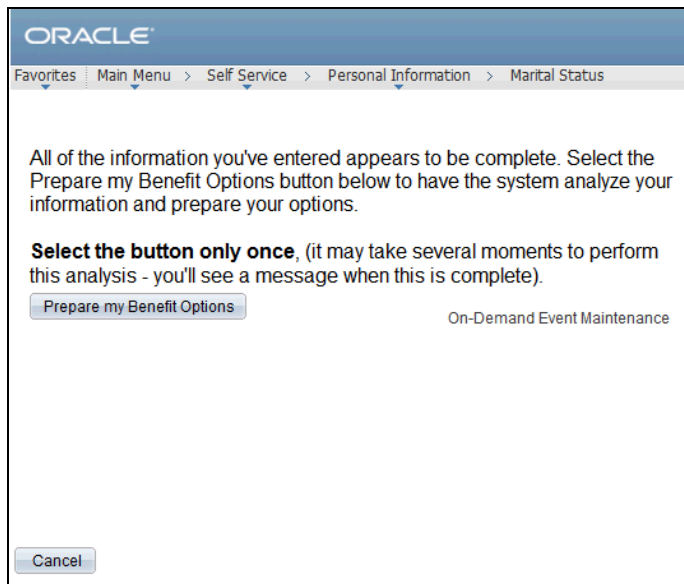
Step	Action
43.	Use the Direct Deposit page to review, add, or update your direct deposit information.
44.	In this example, no additions or edits are needed. Click the Next button. 

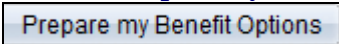


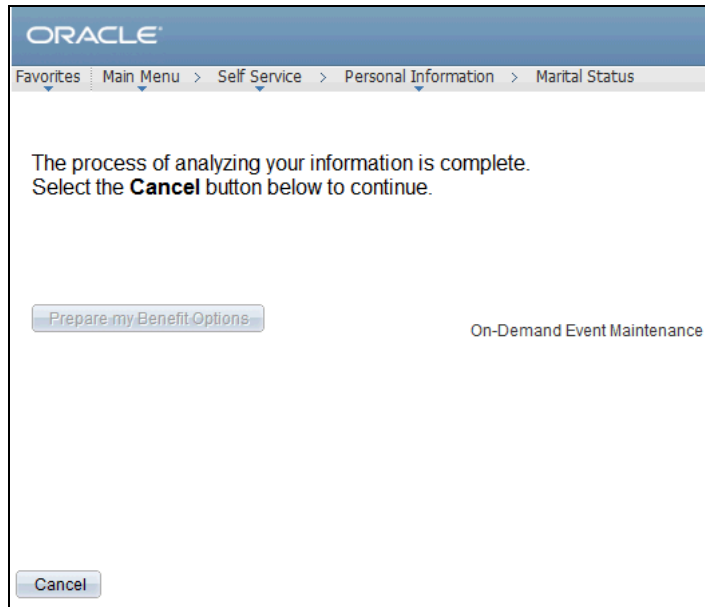
Step	Action
45.	Use the Voluntary Deductions page to review, add, or update your voluntary deductions.
46.	In this example, no additions or edits are needed. Click the Next button. 

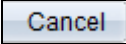


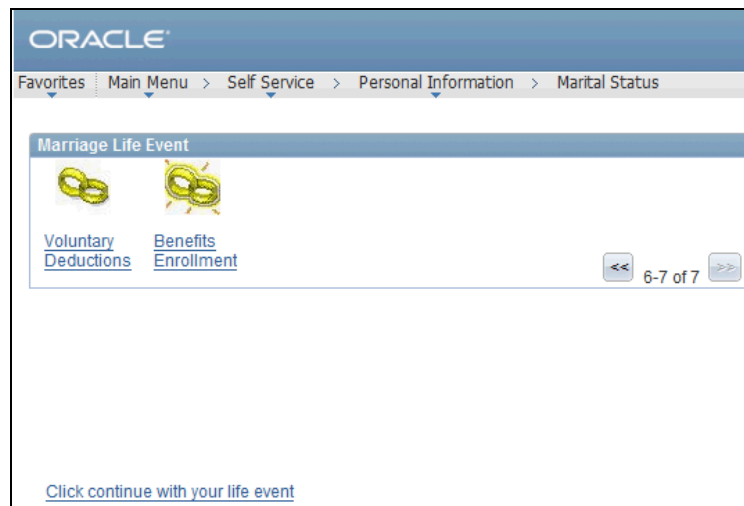
Step	Action
47.	Once you have completed all these steps, your benefit options are ready to be prepared. You can either have your benefits prepared now or you can return to this step later.
48.	In this example, click the Yes, I'd like to prepare my benefit options now link.



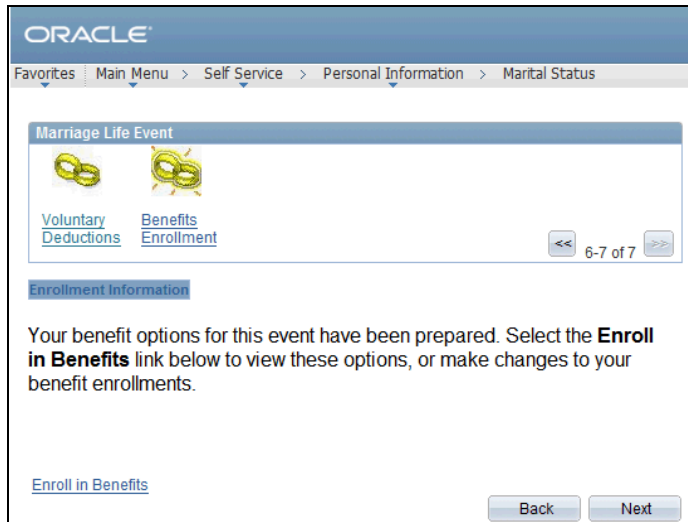
Step	Action
49.	Click the Prepare my Benefit Options button. 



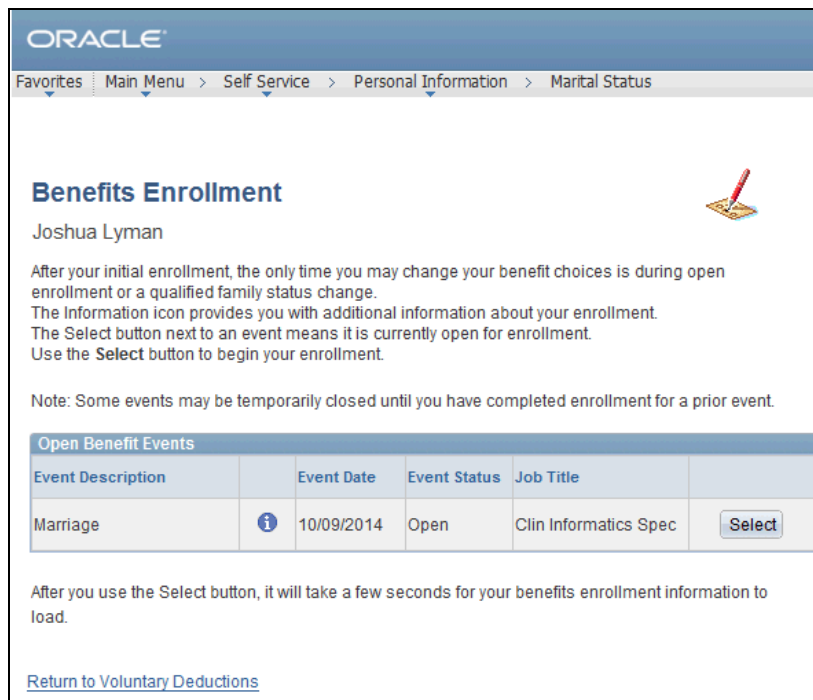
Step	Action
50.	Click the Cancel button. 




Step	Action
51.	Click the Click continue with your life event link.



Step	Action
52.	Click the Enroll in Benefits link.



Step	Action
53.	Based on your life event and the information you entered, your benefits are open for enrollment.
54.	Click the Select button. 

Benefits Enrollment

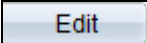
Marriage

Joshua Lyman

i Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Enrollment Summary

Medical	Before Tax	After Tax	Edit
Current: AvMed Health Plan:EE+CH+GC			
New: AvMed Health Plan:EE+CH+GC		108.92	
Dental	Before Tax	After Tax	Edit
Current: Waive			
New: Waive			
Vision	Before Tax	After Tax	Edit
Current: Waive			
New: Waive			
Legal Services	Before Tax	After Tax	Edit
Current: Guardian Legal Classic:Empl Only			
New: Guardian Legal Classic:Empl Only		3.15	
Basic Life	Before Tax	After Tax	Edit
Current: Basic Life: \$10,000			
New: Basic Life: \$10,000			
Supplemental Life	Before Tax	After Tax	Edit
Current: 2X SupLf. Salary X 2			
New: 2X SupLf. Salary X 2 : \$158,000		4.01	
Basic AD&D	Before Tax	After Tax	Edit

Step	Action
55.	In this example, you will edit your medical, supplemental life, and dependent life spouse benefits. Be sure you make all necessary edits before submitting.
56.	Click the Edit button to the right of Medical. 

Benefits Enrollment

Medical

Joshua Lyman

All of our medical choices promote wellness as part of their benefits and are available to protect you and your dependents if you become sick or injured.

i Important! Your current coverage is: AvMed Health Plan with Employee + Child(ren) + GC coverage. You will continue with this coverage if you do not make a choice.

Select an Option

Here Are Your Available Options With Your per-pay-period Costs:
(Your cost = Full benefit cost - Credits)

[Overview of all Plans](#)

Select one of the following plans:

AvMed Health Plan

Coverage Level	Your Costs	Tax Class
Employee Only	\$41.98	Before-Tax
Employee + Spouse	\$128.73	Before-Tax
Employee + Child(ren) + GC	\$108.92	Before-Tax
Family	\$179.29	Before-Tax

United Open Access Plan

Coverage Level	Your Costs	Tax Class
Employee Only	\$83.13	Before-Tax
Employee + Spouse	\$173.80	Before-Tax

Step	Action
57.	Note your current coverage and that, if you do not make any edits, you will continue with this coverage.
58.	Scroll down the page.

Enroll Your Dependents


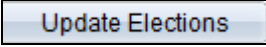
The following list displays all individuals who are eligible to be your dependents. If an individual is missing from this list, use the Add/Review Dependents button to determine why they are not eligible. You may also use this button to add new dependents to your list.

You may enroll any of the following individuals for coverage under this plan by checking the **Enroll** box next to the dependent's name.

Dependent Beneficiary		
Enroll	Name	Relationship
<input checked="" type="checkbox"/>	Sam Lyman	Child
<input checked="" type="checkbox"/>	Toby Lyman	Child
<input checked="" type="checkbox"/>	Abby Lyman	Child
<input type="checkbox"/>	Donna Moss	Spouse

Select the **Update Elections** button to store your choice until you are ready to submit your final enrollment on the Enrollment Summary.

Select the **Discard Changes** button to ignore all entries made on this page and return to the Enrollment Summary.

Step	Action
59.	Click the Enroll option to the left of the appropriate Dependent or Beneficiary. 
60.	Click the Update Elections button. 

Benefits Enrollment

Medical

Joshua Lyman

i Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Your Choice

You have chosen AvMed Health Plan with Family coverage. You are also covering Family.

Your Estimated per-pay-period Cost

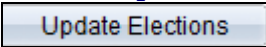
Your Cost: \$179.29

Your Covered Dependents

Primary Care Provider Details	
Name	Relationship
Sam Lyman	Child
Toby Lyman	Child
Abby Lyman	Child
Donna Moss	Spouse


Notes

Once submitted, this choice will take effect on 10/09/2014. Deductions and/or Credits for this choice will start with the pay period beginning 10/05/2014.

Step	Action
61.	Review your selection, including the cost and covered dependents. Click Discard Changes to return and change your choices. Click Update Elections to save your choices.
62.	Click the Update Elections button. 

Benefits Enrollment

Marriage

Joshua Lyman 

i Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Enrollment Summary

Category	Current	New	Before Tax	After Tax	Action
Medical	AvMed Health Plan:EE+CH+GC	AvMed Health Plan:Family		179.29	Edit
Dental	Waive	Waive			Edit
Vision	Waive	Waive			Edit
Legal Services	Guardian Legal Classic:Empl Only	Guardian Legal Classic:Empl Only		3.15	Edit
Basic Life					Edit

Step	Action
63.	Scroll down the page.

Current:	Guardian Legal Classic:Empl Only				
New:	Guardian Legal Classic:Empl Only			3.15	
Basic Life		Before Tax	After Tax		Edit
Current:	Basic Life: \$10,000				
New:	Basic Life: \$10,000				
Supplemental Life		Before Tax	After Tax		Edit
Current:	2X SupLf: Salary X 2				
New:	2X SupLf: Salary X 2 : \$158,000			4.01	
Basic AD&D		Before Tax	After Tax		Edit
Current:	Basic AD&D: \$10,000				
New:	Basic AD&D: \$10,000				
Dependent Life - Child		Before Tax	After Tax		Edit
Current:	Waive				
New:	Waive				

Step	Action
64.	Click the Edit button to the right of Supplemental Life.

Edit

Benefits Enrollment

Supplemental Life

Joshua Lyman

Supplemental Life insurance allows you to purchase coverage in addition to what's provided by the basic life plan.

i **Important! Your current coverage is: SuppLife 2x Base Pay: Salary X 2 . You will continue with this coverage if you do not make a choice.**

Enrollment in this benefit may require proof of coverage.

Your enrollment on this page may affect your choices for the following type(s) of coverage:
 Dependent Life - Child
 Dependent Life Spouse

Complete your enrollment on this page before enrolling in the benefit plans listed above.

Notes
 * If you select this choice, you will be required to provide Evidence of Insurability before coverage takes effect.

Select an Option
 Here Are Your Available Options With Your Per-Pay-Period Costs:
 Select one of the following plans:

Coverage Level	Your Cost	Tax Class
<input type="radio"/> SuppLife 1x Base Pay (\$79,000)	2.01	Before-Tax
<input checked="" type="radio"/> SuppLife 2x Base Pay (\$158,000)	4.01	Before-Tax
<input type="radio"/> SuppLife 3x Base Pay (\$237,000)	6.02	Before-Tax

Step	Action
65.	Note your current coverage and that, if you do not make any edits, you will continue with this coverage.
66.	On this page, select a coverage level and designate allocations to your dependents/beneficiaries. In this example, you will keep the current coverage level.
67.	Scroll down the page.

Designate Your Beneficiaries

The following list displays all individuals who are eligible to be your beneficiaries. If an individual is missing from this list, use the Add/Review Beneficiaries button to determine why they are not eligible.

You may designate the following individuals as Primary or Secondary beneficiaries by allocating a percent or a specific dollar amount. Secondary beneficiaries receive benefits only if all Primary beneficiaries are deceased.

If you select flat dollar amounts, then one beneficiary must be designated to receive any left over money from the policy.

If you select percents, all percents for Primary beneficiaries must total 100. All percents for Secondary beneficiaries (if any) must also total 100.

*Enter Primary Allocations as:

*Enter Secondary Allocations as:

Allocation Details					
Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
Sam Lyman	Child			<input type="text" value="25"/>	<input type="text"/>
Toby Lyman	Child			<input type="text" value="25"/>	<input type="text"/>
Abby Lyman	Child			<input type="text"/>	<input type="text"/>
Donna Moss	Spouse			To <input type="text" value="50"/>	<input type="text"/>

Total:

Step	Action
68.	Next, you will update the allocation details for your Supplemental Life coverage. Be sure to read the information under the Designate Your Beneficiaries section.
69.	Enter the desired information into the New Primary Allocation field for each beneficiary.
70.	Click the Update Elections button. <input type="button" value="Update Elections"/>

Benefits Enrollment

Supplemental Life

Joshua Lyman

i Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Your Choice

You have chosen SuppLife 2x Base Pay (\$158,000) coverage.

Your Estimated Per-Pay-Period Cost

Your Cost: **\$4.01**

Your Primary Beneficiary Allocations

Primary Allocation Details

Name	Relationship	Percent of Benefit
Sam Lyman	Child	25
Toby Lyman	Child	25
Abby Lyman	Child	
Donna Moss	Spouse	50

Your Secondary Beneficiary Allocations

You have not designated any secondary beneficiaries.


Notes

The actual amount of coverage for this plan is based upon your salary, and will vary in accordance with any changes to your salary over time.
Once submitted, this choice will take effect on 10/09/2014. Deductions and/or Credits for this choice will start with the pay period beginning 10/05/2014.

Step	Action
71.	Review your selection, including the cost and allocation details. Click Discard Changes to return and change your choices. Click Update Elections to save your choices.
72.	Click the Update Elections button. <input type="button" value="Update Elections"/>

Benefits Enrollment

Marriage

Joshua Lyman 

i Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Enrollment Summary

Medical	Before Tax	After Tax	Edit
Current: AvMed Health Plan:EE+CH+GC			
New: AvMed Health Plan:Family		179.29	
Dental	Before Tax	After Tax	Edit
Current: Waive			
New: Waive			
Vision	Before Tax	After Tax	Edit
Current: Waive			
New: Waive			
Legal Services	Before Tax	After Tax	Edit
Current: Guardian Legal Classic:Empl Only			
New: Guardian Legal Classic:Empl Only		3.15	

Step	Action
73.	Scroll down the page.

Supplemental AD and D	Before Tax	After Tax	Edit
Current: 5x Sup ADD: Salary X 5			
New: 5x Sup ADD: Salary X 5 : \$395,000		2.74	
Dependent Life Spouse	Before Tax	After Tax	Edit
Current: Waive			
New: Waive			
Business Travel Insurance	Before Tax	After Tax	Edit
Current: Business Travel: \$500,000			
New: Business Travel: \$500,000			
Short-Term Disability	Before Tax	After Tax	
Current: Short Term Disability: 60.00% of Salary			
New: Short Term Disability: 60.00% of Salary			
Long-Term Disability	Before Tax	After Tax	
Current: Long Term Disability Non-Mgmt: 60.00% of Salary			
New: Long Term Disability Non-Mgmt: 60.00% of Salary			
Flex Spending Health - U.S.	Before Tax	After Tax	Edit
Current: Healthcare Spending Acct \$910.00			
New: Healthcare Spending Acct \$910.00		124.09	
Flex Spending Dependent Care	Before Tax	After Tax	Edit

Step	Action
74.	Click the Edit button to the right of Dependent Life Spouse.

Edit

Benefits Enrollment

Dependent Life Spouse

Joshua Lyman

i Important! Your current coverage is: Waive. You will continue with this coverage if you do not make a choice.

This benefit plan requires enrollment in one of the following plans:
Supplemental Life

Changing your choices for any of the benefit plans listed above, may invalidate your enrollment on this page.

Notes
+ Enrollment in this benefit plan requires enrollment in Supplemental Life. The amount of coverage that you elect for this benefit may not exceed 50 percent of the coverage you elect for the Supplemental Life plan.

Select an Option
Here Are Your Available Options With Your Per-Pay-Period Costs:
Select one of the following plans:

Coverage Level	Your Cost	Tax Class
<input type="radio"/> Dependent Life for SP \$10K (\$10,000)	0.92 +	After-Tax
<input type="radio"/> Dependent Life for SP \$20K (\$20,000)	1.85 +	After-Tax
<input type="radio"/> Dependent Life for SP \$30K (\$30,000)	2.77 +	After-Tax
<input type="radio"/> Dependent Life for SP \$40K (\$40,000)	3.69 +	After-Tax
<input checked="" type="radio"/> Waive		

Step	Action
75.	Note your current coverage and that, if you do not make any edits, you will continue with this coverage.
76.	Scroll down the page.

Coverage Level	Your Cost	Tax Class
<input type="radio"/> Dependent Life for SP \$10K (\$10,000)	0.92 +	After-Tax
<input type="radio"/> Dependent Life for SP \$20K (\$20,000)	1.85 +	After-Tax
<input type="radio"/> Dependent Life for SP \$30K (\$30,000)	2.77 +	After-Tax
<input type="radio"/> Dependent Life for SP \$40K (\$40,000)	3.69 +	After-Tax
<input checked="" type="radio"/> Waive		

Step	Action
77.	To enroll in coverage, click the Yes option to the left of the appropriate coverage level. <input type="radio"/>
78.	Scroll down the page.

Dependent Life for SP \$10K (\$10,000) 0.92 + After-Tax
 Dependent Life for SP \$20K (\$20,000) 1.85 + After-Tax
 Dependent Life for SP \$30K (\$30,000) 2.77 + After-Tax
 Dependent Life for SP \$40K (\$40,000) 3.69 + After-Tax
 Waive

Designate Your Dependents

The following list displays all individuals who are eligible to be your dependents. If an individual is missing from this list, use the Add/Review Dependents button to determine why they are not eligible. You may also use this button to add new dependents to your list.

Allocation Details		
Name	Relationship	Covered
Sam Lyman	Child	<input type="checkbox"/>
Toby Lyman	Child	<input type="checkbox"/>
Abby Lyman	Child	<input type="checkbox"/>
Donna Moss	Spouse	<input type="checkbox"/>

Step	Action
79.	Next, designate the dependent you are covering.
80.	Click the Covered option to the right of the appropriate dependent. <input type="checkbox"/>
81.	Click the Update Elections button. <input type="button" value="Update Elections"/>

Benefits Enrollment

Dependent Life Spouse

Joshua Lyman

i Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Your Choice

You have chosen Dependent Life for SP \$30K (\$30,000) coverage.

Your Estimated Per-Pay-Period Cost

Your Cost: \$2.77

Your Covered Dependents

Primary Allocation Details

Name	Relationship	Amount
Donna Moss	Spouse	\$30,000

Notes

The actual amount of coverage for this plan is based upon your salary, and will vary in accordance with any changes to your salary over time.
 Once submitted, this choice will take effect on 10/09/2014. Deductions and/or Credits for this choice will start with the pay period beginning 10/05/2014.

Step	Action
82.	Review your selection, including the cost and allocation details. Click Discard Changes to return and change your choices. Click Update Elections to save your choices.
83.	Click the Update Elections button. <input type="button" value="Update Elections"/>

Benefits Enrollment

Marriage

Joshua Lyman

i Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Enrollment Summary

Medical	Before Tax	After Tax	Edit
Current: AvMed Health Plan:EE+CH+GC			
New: AvMed Health Plan:Family		179.29	
Dental	Before Tax	After Tax	Edit
Current: Waive			
New: Waive			
Vision	Before Tax	After Tax	Edit
Current: Waive			
New: Waive			
Legal Services	Before Tax	After Tax	Edit

Step	Action
84.	Scroll down the page.

Pet Assure Before Tax After Tax

Current: Waive
New: Waive

This table summarizes estimated costs for your new benefit choices.

Election Summary

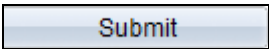
Summarized estimates for new Benefit Elections	Total	Before Tax	After Tax
Costs	316.05	310.13	5.92
Your Costs	316.05	310.13	5.92

These costs do not include certain choices that are based on variable earnings.

Submit

Select the **Submit** button to send your final choices to the Benefits Department.

i Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Step	Action
85.	Be sure to review the Election Summary table. This table contains the summarized estimated costs for your new elections.
86.	Click the Submit button. 

Benefits Enrollment



Submit Benefit Choices

Joshua Lyman

You have almost completed your enrollment. If you have no further changes, select the **Submit** button at the bottom of this page to finalize your benefit choices.

Select the **Cancel** button if you are not ready to submit your choices and wish to return to the Enrollment Summary.

Do not submit your benefit choices until you have completed your enrollment. You may store your choices on each page and return to the Enrollment Summary as many times as you'd like up until your enrollment deadline. However, once you select the Submit button your benefit choices will be sent to the Benefits Department for processing.

Once your enrollment is processed, you may not be able to make any further benefit changes until the next Open Enrollment period or if you have a qualified family status change.

Authorize Elections

By submitting your benefit choices you are authorizing the company to take deductions from your paycheck to pay for your benefit costs. You are also authorizing the Benefits Department to send necessary personal information to your selected providers to initiate and support your coverage.

Select the **Submit** button to send your final choices to the Benefits Department.

Select the **Cancel** button if you are not ready to submit your choices and wish to return to the Enrollment Summary.

Step	Action
87.	Before submitting your benefit choices, please read the information on this page.
88.	Click the Submit button to send your final choices to the Benefits Department. <input type="button" value="Submit"/>

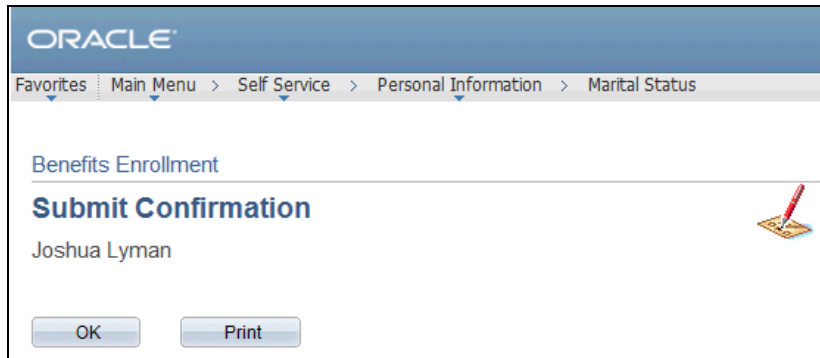
Message

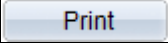
Please certify dependents' use of tobacco products. (21004,7)

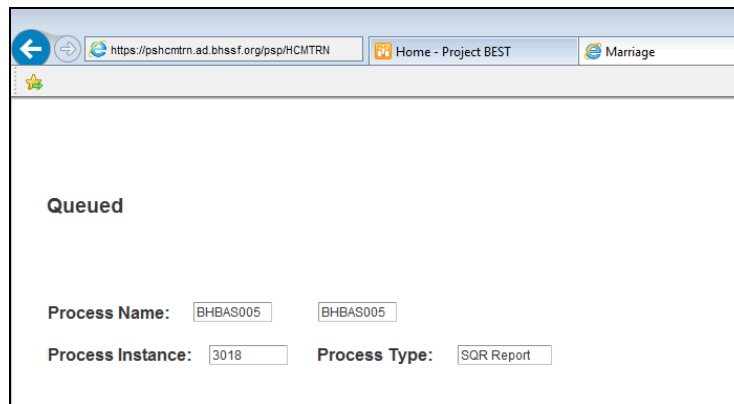
You are certifying that your responses in regards to the use of tobacco products by all of your dependents are truthful. In order to be eligible for the Non-Smoker rates, neither you nor any of your dependents over the age of 18 can use tobacco products.


I understand the requirements for my dependents regarding their use of tobacco products. You cannot submit until you have agreed.

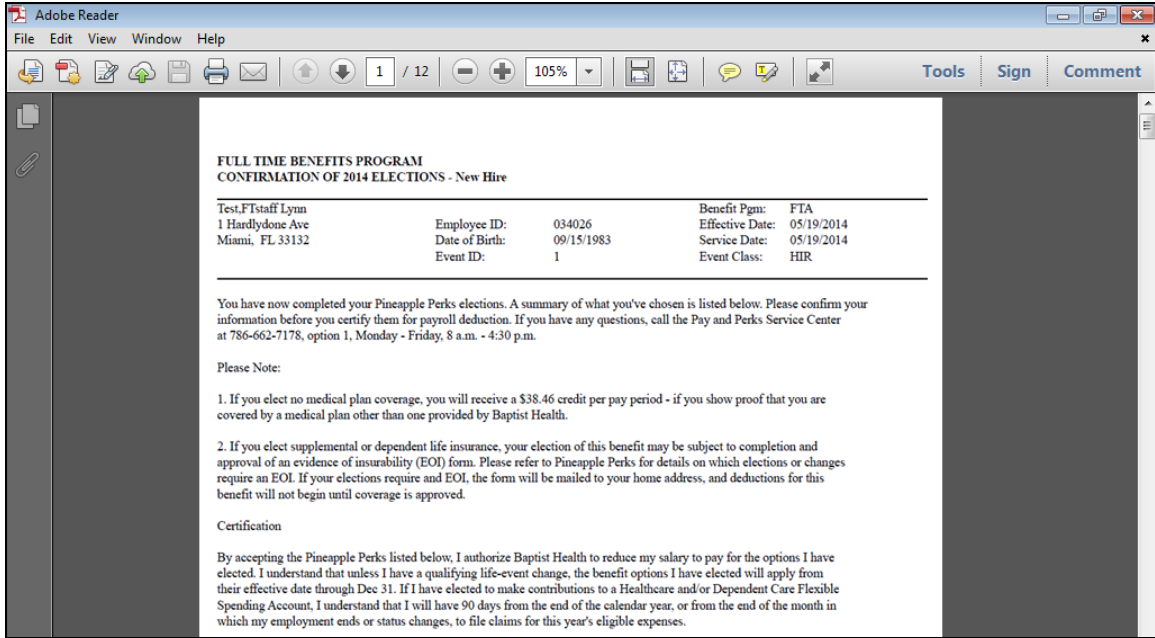
Step	Action
89.	Click the Yes button. <input type="button" value="Yes"/>





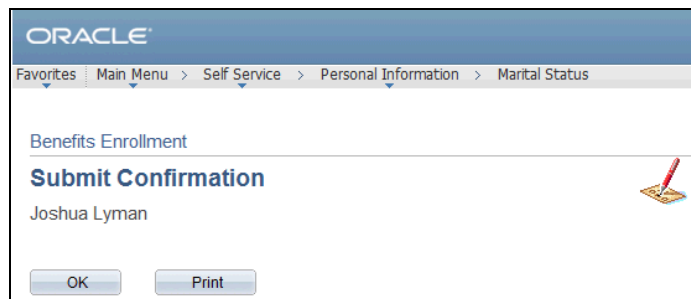
Step	Action
90.	Click the Print button. 
91.	A new window opens confirming that the process for printing your confirmation statement has been queued. Next, you will close the window and navigate to your confirmation page.

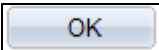


Step	Action
92.	Click the Close button. 



Step	Action
93.	The system opens a PDF of the confirmation statement. There are several pages and contains information including: confirmation of elections, selected benefit plan and option, coverage category, base amounts and pay period deductions. You can also review dependents and beneficiaries for each benefit plan.
94.	Click the Print button. 
95.	Once you have reviewed and printed your confirmation statement, click the Close button. 



Step	Action
96.	Click the OK button. 

Step	Action
97.	Notice, the event status is now set to Submitted.

ORACLE

Favorites | Main Menu > Self Service > Personal Information > Marital Status

Benefits Enrollment

Joshua Lyman

After your initial enrollment, the only time you may change your benefit choices is during open enrollment or a qualified family status change.
 The Information icon provides you with additional information about your enrollment.
 The Select button next to an event means it is currently open for enrollment.
 Use the Select button to begin your enrollment.

Note: Some events may be temporarily closed until you have completed enrollment for a prior event.

Open Benefit Events				
Event Description		Event Date	Event Status	Job Title
Marriage		10/09/2014	Submitted	Clin Informatics Spec

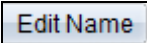
After you use the Select button, it will take a few seconds for your benefits enrollment information to load.

Step	Action
98.	Congratulations. You have updated your marital status in your personal profile. End of Procedure.

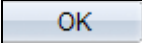
Updating Personal Profile Information - Name

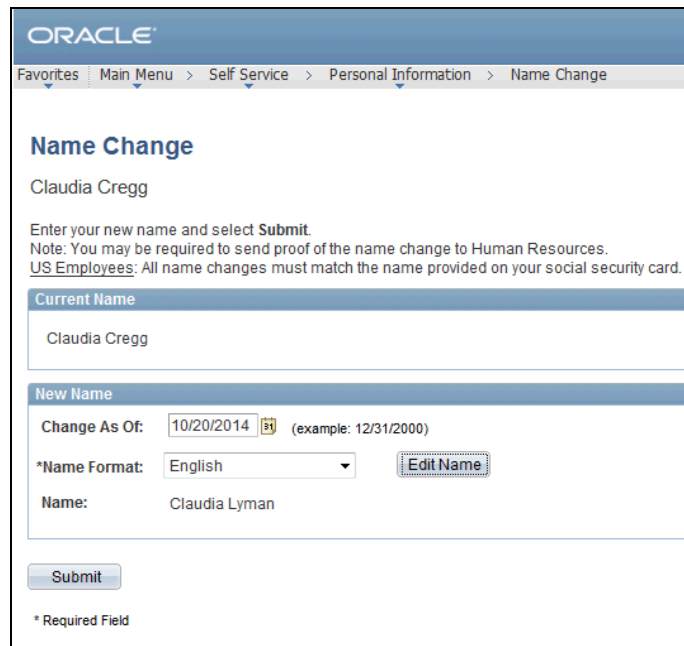
Navigation: Main Menu > HCM > Self Service > Personal Information > Name Change

Purpose: Use this transaction to practice updating your personal profile information. In this example, you will update your name.

Step	Action
1.	Use the Name Change page to update your name. To update your name, you need to select the date the change will occur, enter your new name, and select your name format. Note: You may be required to send proof of the name change to Human Resources. Also, all name changes must match the name provided on your Social Security Card.
2.	Enter the desired information in the Change As Of field.
3.	Click the Edit Name button. 

Step	Action
4.	Use the Edit Name page to update your name.
5.	Click the button to the right of the Prefix field. <input type="button" value="▼"/>
6.	Click the appropriate Prefix list item.
7.	Enter the desired information into the Last Name field.
8.	Click the Refresh Name button. <input type="button" value="Refresh Name"/>

Step	Action
9.	Review the Display Name, Formal Name, and Name fields before continuing to ensure accuracy.
10.	Once you have finished editing, click the OK button. 



ORACLE

Favorites Main Menu > Self Service > Personal Information > Name Change

Name Change

Claudia Cregg

Enter your new name and select **Submit**.
 Note: You may be required to send proof of the name change to Human Resources.
[US Employees](#): All name changes must match the name provided on your social security card.

Current Name

Claudia Cregg

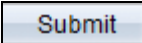
New Name

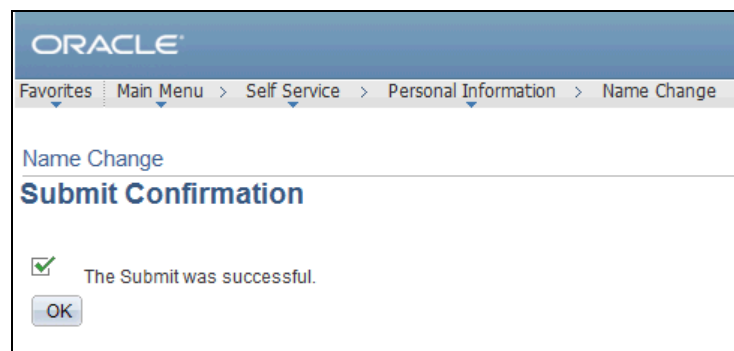
Change As Of: 10/20/2014 (example: 12/31/2000)

*Name Format: English

Name: Claudia Lyman

* Required Field

Step	Action
11.	Click the Submit button. 




ORACLE

Favorites Main Menu > Self Service > Personal Information > Name Change

Name Change

Submit Confirmation

The Submit was successful.

Step	Action
12.	Click the OK button. 

Step	Action
13.	Congratulations. You have updated your name in your personal profile. End of Procedure.

Updating Personal Profile Information - Ethnic Group

Navigation: Main Menu > HCM > Self Service > Personal Information > Ethnic Groups

Purpose: Use this transaction to practice updating your personal profile information. In this example, you will update your ethnic group information.

Ethnicity

Joshua Lyman

The employer is subject to certain governmental recordkeeping and reporting requirements for the administration of civil rights laws and regulations. In order to comply with these laws, the employer invites employees to voluntarily self-identify their race or ethnicity. Submission of this information is voluntary and refusal to provide it will not subject you to any adverse treatment. The information obtained will be kept confidential and may only be used in accordance with the provisions of applicable laws, executive orders, and regulations, including those that require the information to be summarized and reported to the federal government for civil rights enforcement. When reported, data will not identify any specific individual.

1) Are you Hispanic or Latino? [Explain](#)

Yes

No

2) What is your race? Select one or more. [Explain](#)

American Indian or Alaska Native

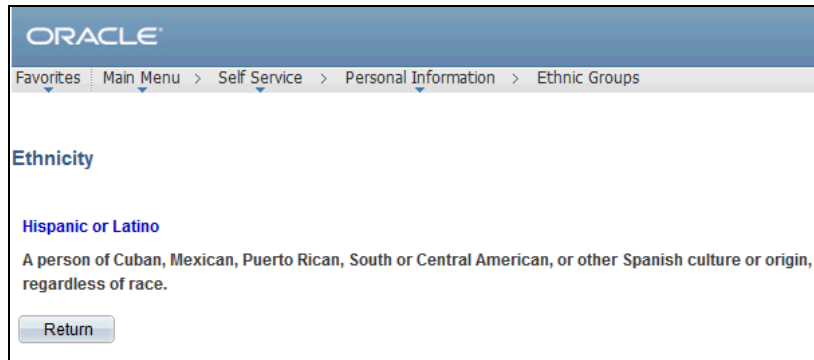
Asian

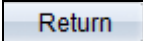
Black or African American

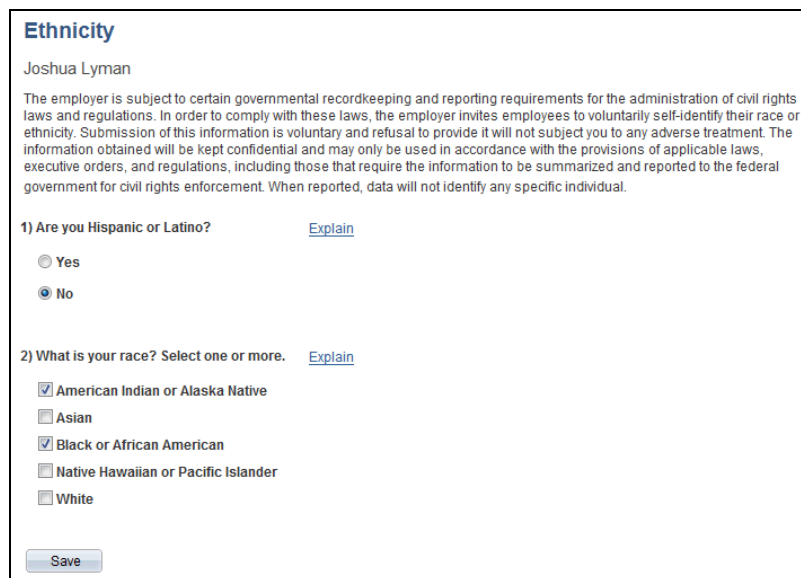
Native Hawaiian or Pacific Islander


White

Step	Action
1.	Use the Ethnicity page to voluntarily select the race or ethnicity with which you identify. Submitting this information is voluntary and refusal to provide it will not result in any adverse treatment. Should you provide this information, all information will be kept confidential and may only be used in accordance with the provisions of applicable laws, executive orders, and regulations, including those that require the information to be summarized and submitted to the federal government for civil rights enforcement.
2.	If you need more information when making a selection on this page, click the Explain link to the right of Question 1. Explain



Step	Action
3.	<p>Additional information is provided here to help you make the appropriate selection.</p> <p>Read the displayed information and then click the Return button.</p> 



Step	Action
4.	In this example, you will update the race you identify with.
5.	<p>Click the Explain link to the right of Question 2.</p> 

Race

American Indian or Alaska Native
A person having origins in any of the original peoples of North and South America (including Central America) who maintains cultural identification through tribal affiliation or community attachment.

Asian
A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian Subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.

Black or African American
A person having origins in any of the black racial groups of Africa.

Native Hawaiian or Pacific Islander
A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

White
A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.

Step	Action
6.	Read the displayed information and then click the Return button. <input type="button" value="Return"/>

Ethnicity

Joshua Lyman

The employer is subject to certain governmental recordkeeping and reporting requirements for the administration of civil rights laws and regulations. In order to comply with these laws, the employer invites employees to voluntarily self-identify their race or ethnicity. Submission of this information is voluntary and refusal to provide it will not subject you to any adverse treatment. The information obtained will be kept confidential and may only be used in accordance with the provisions of applicable laws, executive orders, and regulations, including those that require the information to be summarized and reported to the federal government for civil rights enforcement. When reported, data will not identify any specific individual.

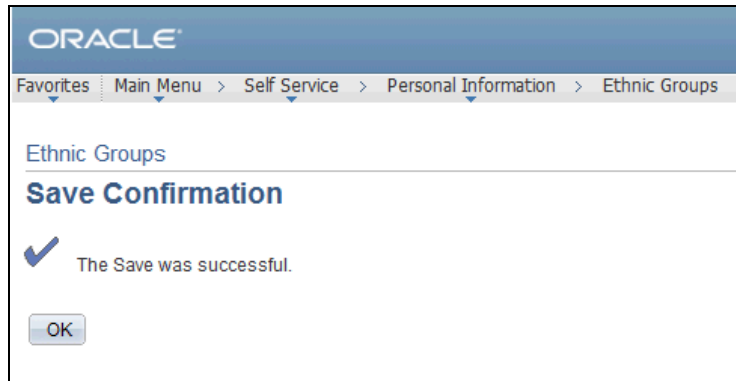
1) Are you Hispanic or Latino? [Explain](#)


Yes
 No

2) What is your race? Select one or more. [Explain](#)

American Indian or Alaska Native
 Asian
 Black or African American
 Native Hawaiian or Pacific Islander
 White

Step	Action
7.	Deselect the American Indian or Alaska Native option. <input checked="" type="checkbox"/>
Step	Action
8.	Once you have made all updates, click the Save button. <input type="button" value="Save"/>




Step	Action
9.	Click the OK button. 
10.	Congratulations. You have updated your ethnic group information in your personal profile. End of Procedure.

Managing Benefits

Updating Benefit Elections - New Hire

Navigation: Main Menu > HCM > Self Service > Benefits > Benefits Enrollment


Objective: Use this transaction to practice electing benefits during a new hire event.

Benefits Enrollment 


Hyacinth Bloom

After your initial enrollment, the only time you may change your benefit choices is during open enrollment or a qualified family status change.
 The Information icon provides you with additional information about your enrollment.
 The Select button next to an event means it is currently open for enrollment.
 Use the Select button to begin your enrollment.

Note: Some events may be temporarily closed until you have completed enrollment for a prior event.

Open Benefit Events				
Event Description		Event Date	Event Status	Job Title
New Hire		09/29/2014	Open	Intl Phy Rel Specialist

After you use the Select button, it will take a few seconds for your benefits enrollment information to load.

Step	Action
1.	Use the Benefits Enrollment page to view your open benefit events. Any event with a Select button next to it means it is currently open for enrollment. Click the Select button to begin your enrollment.
2.	Click the Select button. 

Benefit Notices Delivery Preferences

Hyacinth Bloom

You may select an option for receiving benefit notices.
You must select an option before you can enroll in benefits.

The Baptist Health Summary Plan Descriptions (SPDs) for your employee benefit plans are available at Baptist Health's intranet site. SPDs include details about the benefits and services available to you and your eligible dependents through these plans.

Please read through these documents so you will be familiar with the content. You can also print a copy for future reference.

Other notices you may receive electronically include summary annual reports and privacy notices. You will be notified as these documents are updated.



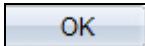
As a participant, you have the right to request and obtain a paper version of these documents. Choose your preferred delivery method below:

Select an Option


YES - I have access to a computer at work or at home and i agree to the electronic delivery method of these documents

NO - I don't agree with the electronic delivery method and would like to receive a paper version of these documents

OK Apply

Step	Action
3.	Read the Benefit Notices Delivery Preferences message before selecting an option.
4.	In this example, click the YES radio button. 
5.	Click the Apply button. 
6.	Click the OK button. 

Benefits Enrollment

New Hire 

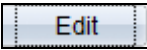
Hyacinth Bloom

As a new hire you must enroll in benefits within **31 days** from your date of hire.
If you do not enroll it may result in no coverage for yourself and any dependents.
The only time you can change your benefit choices is during Open Enrollment or if you have a qualified family status change.

i Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Enrollment Summary

Medical	Before Tax	After Tax	Edit
Current: No Coverage			
New: Waive			
Dental	Before Tax	After Tax	Edit
Current: No Coverage			
New: Waive			
Vision	Before Tax	After Tax	Edit
Current: No Coverage			
New: Waive			
Local Services	Before Tax	After Tax	Edit

Step	Action
7.	<p>Use the Enrollment Summary table to view your current coverage and elect new coverage.</p> <p>To elect benefits, click the Edit button to the right of the appropriate benefit. In this example, you will elect coverage for several benefits. Be sure you make all necessary edits before submitting.</p>
8.	<p>Click the Edit button to the right of Medical.</p> 

Benefits Enrollment

Medical

Hyacinth Bloom

All of our medical choices promote wellness as part of their benefits and are available to protect you and your dependents if you become sick or injured.

i Important! Your current coverage is: No Coverage. Coverage for this plan will be waived if you do not make an election.

Select an Option

Here Are Your Available Options With Your per-pay-period Costs:
(Your cost = Full benefit cost - Credits)

[Overview of all Plans](#)

Select one of the following plans:

AvMed Health Plan

Coverage Level	Your Costs	Tax Class
Employee Only	\$41.98	Before-Tax
Employee + Spouse	\$128.73	Before-Tax
Employee + Child(ren) + GC	\$108.92	Before-Tax
Family	\$179.29	Before-Tax

United Open Access Plan

Coverage Level	Your Costs	Tax Class
Employee Only	\$83.13	Before-Tax
Employee + Spouse	\$173.80	Before-Tax

Step	Action
9.	For each benefit you wish to enroll in, there is a note reminding you of your current coverage. Until your elections are submitted your coverage will not change.
10.	To enroll in coverage, click the radio button to the left of the appropriate medical plan. <input type="checkbox"/>
11.	Scroll down the page.

Enroll Your Dependents

The following list displays all individuals who are eligible to be your dependents. If an individual is missing from this list, use the Add/Review Dependents button to determine why they are not eligible. You may also use this button to add new dependents to your list.

You may enroll any of the following individuals for coverage under this plan by checking the Enroll box next to the dependent's name.

Dependent Beneficiary		
Enroll	Name	Relationship
<input type="checkbox"/>		

[Add/Review Dependents](#)

[Update Elections](#) [Discard Changes](#)

Select the **Update Elections** button to store your choice until you are ready to submit your final

Step	Action
12.	Currently, you have no dependents listed. If you do not wish to enroll any dependents, click the Update Elections button to continue. In this example, you will add dependents.
13.	Click the Add/Review Dependents button. Add/Review Dependents

Add/Review Dep/Ben

Hyacinth Bloom

The people listed below may be eligible for Benefit Coverage. Select a name to view or modify their personal information.

No Dependents on Record

[Add a dependent or beneficiary](#)

[Return to Event Selection](#)

Step	Action
14.	Click the Add a dependent or beneficiary button. Add a dependent or beneficiary

Dependent/Beneficiary Personal Information

Hyacinth Bloom


Select Save once you have added your Dependent/Beneficiary's personal information. This information will go into effect as of Sep 29, 2014.


Personal Information


*First Name:

Middle Name:

*Last Name:

Name Prefix: 

Name Suffix: 


Date of Birth: 


*Gender:


SSN: (Social Security Number)


*Relationship to Employee:

Status Information

*Marital Status: As of: 

Student: As of: 



Disabled: As of: 

Smoker: As of: 

Address and Telephone

Same Address as Employee

Country: United States
Address: 123 Main Street
Miami, FL 99999

Step	Action
15.	Use the Dependent/Beneficiary Personal Information page to enter your dependent and beneficiary information.
16.	Enter the desired information into the First Name field.
17.	Enter the desired information into the Last Name field.
18.	Enter the desired information into the Date of Birth field.
19.	Note, the Gender field defaults to Male. Ensure you select the appropriate gender when entering dependent/beneficiary information.
20.	If you do not know the Social Security Number, or your dependent does not have one, you can leave this blank. After saving their information, you will be asked for a reason why there is no Social Security Number listed.
21.	Enter the desired information into the SSN field.
22.	Click the button to the right of the Relationship to Employee field. 
23.	Click the appropriate Relationship list item.
24.	Click the button to the right of the Marital Status field. 
25.	Click the appropriate Marital Status list item.
26.	Notice that the Smoker Status Defaults to Non Smoker. It is your responsibility to ensure that this field reflects your dependents correct Smoker status.
Step	Action
27.	Scroll down the page.

Name Suffix:

Date of Birth: 06/21/1969

*Gender: Male

SSN: 112-20-0020 (Social Security Number)

*Relationship to Employee: Spouse

Status Information

*Marital Status: Married As of:

Student: No As of:

Disabled: No As of:

Smoker: Non Smoker As of:

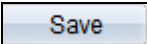
Address and Telephone

Same Address as Employee

Country: United States
Address: 123 Main Street
Miami, FL 99999

Same Phone as Employee

Phone:

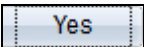
Step	Action
28.	In the Address and Telephone section, click the Same Address as Employee option if your spouse has the same address and/or phone number. Deselect the option to enter a different address or telephone number.
29.	Click the Save button. 

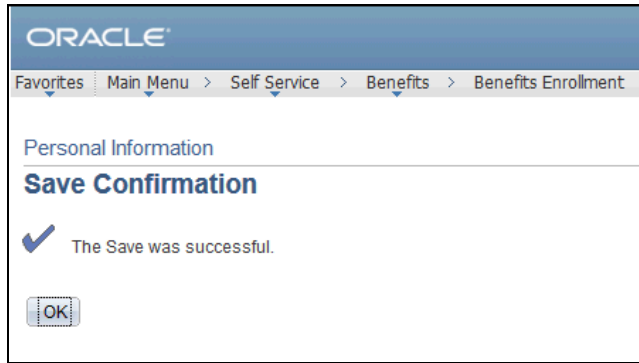
Message


Please certify this dependent's use of tobacco products. (21004,4)

You are certifying that your response in regards to the use of tobacco products by this dependent is truthful. In order to be eligible for the Non-Smoker rates, neither you nor any of your dependents over the age of 18 can use tobacco products.

I understand the requirements for my dependent regarding their use of tobacco products. You cannot Save this dependent's information until you select 'Yes'.

Step	Action
30.	Click the Yes button if the selected Smoker status is accurate. Click the No button to return and make any necessary edits. In this example, click the Yes button. 



Step	Action
31.	Click the OK button. 



Step	Action
32.	Click the Return to Dependent/Beneficiary Summary link.

Add/Review Dep/Ben

Hyacinth Bloom

The people listed below may be eligible for Benefit Coverage. Select a name to view or modify their personal information.

Dependent Information						
Name	Relationship to Employee	Date of Birth	Marital Status	Marital Status Date	Student	Disabled
Paul Bloom	Spouse	06/21/1969	Married		No	No

[Add a dependent or beneficiary](#)
[Return to Event Selection](#)

Step	Action
33.	Notice, your dependent has been successfully added. To add another dependent, repeat steps 14-32.
34.	Once you have added all dependents, click the Return to Event Selection link. Return to Event Selection

Benefits Enrollment

Medical

Hyacinth Bloom

All of our medical choices promote wellness as part of their benefits and are available to protect you and your dependents if you become sick or injured.

i Important! Your current coverage is: No Coverage. Coverage for this plan will be waived if you do not make an election.

Select an Option

Here Are Your Available Options With Your per-pay-period Costs:
(Your cost = Full benefit cost - Credits)

[Overview of all Plans](#)

Select one of the following plans:

AvMed Health Plan

Coverage Level	Your Costs	Tax Class
Employee Only	\$41.98	Before-Tax
Employee + Spouse	\$128.73	Before-Tax
Employee + Child(ren) + GC	\$108.92	Before-Tax
Family	\$179.29	Before-Tax

United Open Access Plan

Step	Action
35.	Scroll down the page.

Enroll Your Dependents

The following list displays all individuals who are eligible to be your dependents. If an individual is missing from this list, use the Add/Review Dependents button to determine why they are not eligible. You may also use this button to add new dependents to your list.

You may enroll any of the following individuals for coverage under this plan by checking the **Enroll** box next to the dependent's name.

Dependent Beneficiary		
Enroll	Name	Relationship
<input checked="" type="checkbox"/>	Paul Bloom	Spouse
<input checked="" type="checkbox"/>	Violet Bloom	Child

Select the **Update Elections** button to store your choice until you are ready to submit your final

Step	Action
36.	Next, enroll those individuals you would like covered under the selected medical plan.
37.	Click the Enroll checkbox to the left of the appropriate dependent(s) to enroll them for medical coverage under the selected plan. <input type="checkbox"/>
38.	Click the Update Elections button. <input type="button" value="Update Elections"/>

Benefits Enrollment

Medical

Hyacinth Bloom

i Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Your Choice

You have chosen AvMed Health Plan with Family coverage. You are also covering Family.

Your Estimated per-pay-period Cost

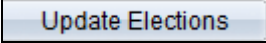
Your Cost: \$179.29

Your Covered Dependents

Primary Care Provider Details	
Name	Relationship
Paul Bloom	Spouse
Violet Bloom	Child


Notes

Once submitted, this choice will take effect on 12/01/2014. Deductions and/or Credits for this choice will start with the pay period beginning 11/30/2014.

Step	Action
39.	Review your selection, including the cost and covered dependents. Click Discard Changes to return and change your choices. Click Update Elections to save your choices.
40.	Click the Update Elections button. 

Benefits Enrollment

New Hire

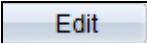
Hyacinth Bloom 

As a new hire you must enroll in benefits within 31 days from your date of hire. If you do not enroll it may result in no coverage for yourself and any dependents. The only time you can change your benefit choices is during Open Enrollment or if you have a qualified family status change.

i Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Enrollment Summary

Medical	Before Tax	After Tax	<input type="button" value="Edit"/>
Current: No Coverage			
New: AvMed Health Plan:Family	179.29		
Dental	Before Tax	After Tax	<input type="button" value="Edit"/>
Current: No Coverage			
New: Waive			
Vision	Before Tax	After Tax	<input type="button" value="Edit"/>
Current: No Coverage			
New: Waive			

Step	Action
41.	Click the Edit button to the right of Dental. 

Benefits Enrollment

Dental

Hyacinth Bloom

Dental coverage allows you and your dependents to have routine cleaning visits and receive services such as the installation of fillings and crowns.

i Important! Your current coverage is: No Coverage. Coverage for this plan will be waived if you do not make an election.

Select an Option

Here Are Your Available Options With Your per-pay-period Costs:
(Your cost = Full benefit cost - Credits)

[Overview of all Plans](#)


Select one of the following plans:

MetLife SafeGuard Basic Dental

Coverage Level	Your Costs	Tax Class
Employee Only	\$0.00	Before-Tax
Employee + 1 Dependent	\$1.85	Before-Tax
Family	\$4.09	Before-Tax

MetLife SafeGuard Basic Plus

Coverage Level	Your Costs	Tax Class
Employee Only	\$3.01	Before-Tax
Employee + 1 Dependent	\$7.20	Before-Tax

Step	Action
42.	To enroll in coverage, click the radio button to the left of the appropriate dental plan. 
43.	Scroll down the page.

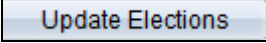
Enroll Your Dependents

The following list displays all individuals who are eligible to be your dependents. If an individual is missing from this list, use the Add/Review Dependents button to determine why they are not eligible. You may also use this button to add new dependents to your list.

You may enroll any of the following individuals for coverage under this plan by checking the Enroll box next to the dependent's name.

Dependent Beneficiary		
Enroll	Name	Relationship
<input type="checkbox"/>	Paul Bloom	Spouse
<input type="checkbox"/>	Violet Bloom	Child

Step	Action
44.	Next, enroll those individuals you would like covered under the selected dental plan.

Step	Action
45.	Click the Enroll checkbox to the left of the appropriate dependent(s). <input type="checkbox"/>
46.	Click the Update Elections button. 

Dental

Hyacinth Bloom

i Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Your Choice

You have chosen MetLife SafeGuard Basic Plus with Family coverage. You are also covering Family.

Your Estimated per-pay-period Cost

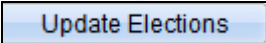
Your Cost: **\$11.31**

Your Covered Dependents

Primary Care Provider Details	
Name	Relationship
Paul Bloom	Spouse
Violet Bloom	Child

Notes

Once submitted, this choice will take effect on 12/01/2014. Deductions and/or Credits for this choice will start with the pay period beginning 11/30/2014.

Step	Action
47.	Review your selection, including the cost and covered dependents. Click Discard Changes to return and change your choices. Click Update Elections to save your choices.
48.	Click the Update Elections button. 

Benefits Enrollment

New Hire

Hyacinth Bloom

As a new hire you must enroll in benefits within 31 days from your date of hire. If you do not enroll it may result in no coverage for yourself and any dependents. The only time you can change your benefit choices is during Open Enrollment or if you have a qualified family status change.

Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Enrollment Summary

Category	Current	New	Before Tax	After Tax	Action
Medical	No Coverage	AvMed Health Plan:Family	179.29		Edit
Dental	No Coverage	MetLife SafeGuard Basic Plus:Family	11.31		Edit
Vision	No Coverage	CompBenefits Vision Care Plan:Family	7.15		Edit
Legal Services	No Coverage	Guardian Legal Classic:Empl Only	3.15		Edit
Basic Life	No Coverage	Basic Life: \$10,000			Edit

Step	Action
49.	<p>Notice, in addition to medical and dental, coverage for vision and legal services has been edited for you.</p> <p>Next, you will select a beneficiary for Basic Life.</p>

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Self Service > Benefits > Benefits Enrollment

Benefits Enrollment

New Hire

Hyacinth Bloom

As a new hire you must enroll in benefits within 31 days from your date of hire. If you do not enroll it may result in no coverage for yourself and any dependents. The only time you can change your benefit choices is during Open Enrollment or if you have a qualified family status change.

Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Enrollment Summary

Category	Current	New	Before Tax	After Tax	Action
Medical	No Coverage	AvMed Health Plan:Family	179.29		Edit
Dental	No Coverage	MetLife SafeGuard Basic Plus:Family	11.31		Edit
Vision	No Coverage	CompBenefits Vision Care Plan:Family	7.15		Edit
Legal Services	No Coverage	Guardian Legal Classic:Empl Only	3.15		Edit
Basic Life	No Coverage	Basic Life: \$10,000			Edit
Supplemental Life	No Coverage	Waive			Edit
Basic AD&D					Edit

Step	Action
50.	Click the Edit button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">Edit</div>

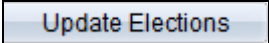
The screenshot shows the Oracle Benefits Enrollment interface. At the top, there are navigation links: Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. Below this is a breadcrumb trail: Favorites | Main Menu > Self Service > Benefits > Benefits Enrollment. The page title is "Benefits Enrollment" and the sub-section is "Basic Life" for Hyacinth Bloom. A message states: "Important! Your current coverage is: No Coverage. If you do not make a choice, your coverage will be: Basic Life: \$10,000". There is a "Notes" section explaining that coverage is automatic but requires beneficiary designation. A section titled "Here is Your Available Option With Your Per-Pay-Period Cost" shows "Basic Life (\$10,000)" as the selected option. The "Designate Your Beneficiaries" section provides instructions on how to allocate percentages to primary and secondary beneficiaries. Below this are two dropdown menus for "Enter Primary Allocations as:" and "Enter Secondary Allocations as:", both currently set to "Percent". At the bottom, there is an "Allocation Details" table with columns for Name, Relationship, Current Primary Percent, Current Secondary Percent, New Primary Allocation, and New Secondary Allocation.

Step	Action
51.	Scroll down the page.

This is a close-up of the "Designate Your Beneficiaries" section from the previous screenshot. It includes the same instructions and dropdown menus. The "Allocation Details" table is now visible with data for two beneficiaries:

Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
Paul Bloom	Spouse			<input type="text"/>	<input type="text"/>
Violet Bloom	Child			<input type="text"/>	<input type="text"/>
Total:				0	0

At the bottom of this section are two buttons: "Update Elections" and "Discard Changes".

Step	Action
52.	Click the Add/Review Beneficiaries button to add a beneficiary. In this example, you are not adding any beneficiaries. You can select your existing dependents as the beneficiaries.
53.	Read the designation and allocation message for important information when selecting beneficiaries and selecting allocation details.
54.	In this example, 100% will be allocated to one beneficiary. Enter 100 in the New Primary Allocation field to the right of the appropriate Beneficiary.
55.	Click the Update Elections button. 

Benefits Enrollment

Basic Life

Hyacinth Bloom

i Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Your Choice

You have chosen Basic Life (\$10,000) coverage.

Your Estimated Per-Pay-Period Cost

This coverage is provided at no cost to you.

Your Primary Beneficiary Allocations

Primary Allocation Details		
Name	Relationship	Percent of Benefit
Paul Bloom	Spouse	100

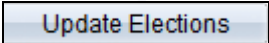
Your Secondary Beneficiary Allocations

You have not designated any secondary beneficiaries.

Notes

The actual amount of coverage for this plan is based upon your salary, and will vary in accordance with any changes to your salary over time.
Once submitted, this choice will take effect on 12/01/2014. Deductions and/or Credits for this choice will start with the pay period beginning 11/30/2014.

[Select the Update Elections button to store your choices.](#)
[Select the Discard Changes button to go back and change your choices.](#)

Step	Action
56.	Review your selection, including the cost and your beneficiary allocations. Click Discard Changes to return and change your choices. Click Update Elections to save your choices.
57.	Click the Update Elections button. 

Benefits Enrollment

New Hire

Hyacinth Bloom

As a new hire you must enroll in benefits within 31 days from your date of hire. If you do not enroll it may result in no coverage for yourself and any dependents. The only time you can change your benefit choices is during Open Enrollment or if you have a qualified family status change.

Important! Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Enrollment Summary

Category	Current	New	Before Tax	After Tax	Edit
Medical	No Coverage	AvMed Health Plan:Family	179.29		Edit
Dental	No Coverage	MetLife SafeGuard Basic Plus:Family	11.31		Edit
Vision	No Coverage	CompBenefits Vision Care Plan:Family	7.15		Edit
Legal Services	No Coverage	Guardian Legal Classic:Empl Only	3.15		Edit
Basic Life	No Coverage	Basic Life: \$10,000			Edit
Supplemental Life	No Coverage	Waive			Edit
Basic AD&D					Edit

Step	Action
58.	Click the Edit button to the right of Supplemental Life.

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Self Service > Benefits > Benefits Enrollment

Benefits Enrollment

Supplemental Life

Hyacinth Bloom

Supplemental Life insurance allows you to purchase coverage in addition to what's provided by the basic life plan.

Important! Your current coverage is: No Coverage. Coverage for this plan will be waived if you do not make an election.

Enrollment in this benefit may require proof of coverage.

Your enrollment on this page may affect your choices for the following type(s) of coverage:
 Dependent Life - Child
 Dependent Life Spouse

Complete your enrollment on this page **before** enrolling in the benefit plans listed above.

Notes

* If you select this choice, you will be required to provide Evidence of Insurability before coverage takes effect.

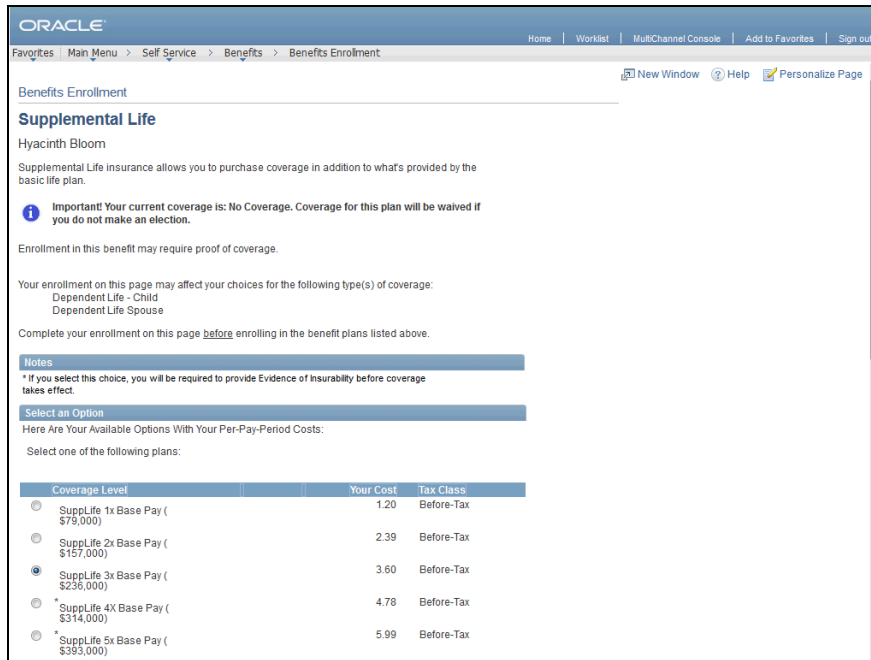
Select an Option

Here Are Your Available Options With Your Per-Pay-Period Costs:

Select one of the following plans:

Coverage Level	Your Cost	Tax Class
<input type="radio"/> SuppLife 1x Base Pay (\$75,000)	1.20	Before-Tax
<input type="radio"/> SuppLife 2x Base Pay (\$157,000)	2.39	Before-Tax
<input type="radio"/> SuppLife 3x Base Pay (\$236,000)	3.60	Before-Tax
<input type="radio"/> SuppLife 4x Base Pay (\$314,000)	4.78	Before-Tax
<input type="radio"/> SuppLife 5x Base Pay (\$393,000)	5.99	Before-Tax

Step	Action
59.	To enroll in coverage, click the radio button to the left of the appropriate supplemental life plan.



Step	Action
60.	Scroll down the page.

Designate Your Beneficiaries

The following list displays all individuals who are eligible to be your beneficiaries. If an individual is missing from this list, use the Add/Review Beneficiaries button to determine why they are not eligible.

You may designate the following individuals as Primary or Secondary beneficiaries by allocating a percent or a specific dollar amount. Secondary beneficiaries receive benefits only if all Primary beneficiaries are deceased.

If you select flat dollar amounts, then one beneficiary must be designated to receive any left over money from the policy.

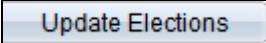
If you select percents, all percents for Primary beneficiaries must total 100. All percents for Secondary beneficiaries (if any) must also total 100.

*Enter Primary Allocations as:

*Enter Secondary Allocations as:

Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
Paul Bloom	Spouse			<input type="text"/>	<input type="text"/>
Violet Bloom	Child			<input type="text"/>	<input type="text"/>
Total:				0	0

Step	Action
61.	Click the Add/Review Beneficiaries button to add a beneficiary. In this example, you are not adding any beneficiaries. You can select your existing dependents as the beneficiaries.

Step	Action
62.	Read the designation and allocation message for important information when selecting beneficiaries and selecting allocation details.
63.	In this example, 100% will be allocated to one beneficiary. Enter 100 in the New Primary Allocation field to the right of the appropriate Beneficiary.
64.	Click the Update Elections button. 

Benefits Enrollment

Supplemental Life

Hyacinth Bloom

i Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Your Choice
You have chosen SuppLife 3x Base Pay (\$236,000) coverage.

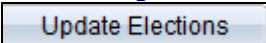
Your Estimated Per-Pay-Period Cost
Your Cost: \$3.60

Your Primary Beneficiary Allocations

Primary Allocation Details		
Name	Relationship	Percent of Benefit
Paul Bloom	Spouse	100

Your Secondary Beneficiary Allocations
You have not designated any secondary beneficiaries.

Notes
The actual amount of coverage for this plan is based upon your salary, and will vary in accordance with any changes to your salary over time.
Once submitted, this choice will take effect on 12/01/2014. Deductions and/or Credits for this choice will start with the pay period beginning 11/30/2014.

Step	Action
65.	Review your selection, including the cost and your beneficiary allocations. Click Discard Changes to return and change your choices. Click Update Elections to save your choices.
66.	Click the Update Elections button. 

Benefits Enrollment

New Hire

Hyacinth Bloom

As a new hire you must enroll in benefits within 31 days from your date of hire. If you do not enroll it may result in no coverage for yourself and any dependents. The only time you can change your benefit choices is during Open Enrollment or if you have a qualified family status change.

Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Enrollment Summary			
Medical	Before Tax	After Tax	Edit
Current: No Coverage			
New: AvMed Health Plan:Family		179.29	
Dental	Before Tax	After Tax	Edit
Current: No Coverage			
New: MetLife SafeGuard Basic Plus:Family		11.31	
Vision	Before Tax	After Tax	Edit
Current: No Coverage			
New: CompBenefits Vision Care Plan:Family		7.15	
Legal Services	Before Tax	After Tax	Edit
Current: No Coverage			
New: Guardian Legal Classic:Empl Only		3.15	

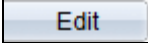
Step	Action
67.	Scroll down the page.
68.	In addition to basic and supplemental, coverage for basic AD&D, supplemental ADD, dependent life spouse, dependent life child, business travel insurance, short-term disability and long-term disability has been edited for you. Next, you will enroll in a health spending account.

Long-Term Disability	Before Tax	After Tax	
Current: No Coverage			
New: Long Term Disability Phys: 60.00% of Salary			
Flex Spending Health - U.S.	Before Tax	After Tax	Edit
Current: No Coverage			
New: Waive		0.00	
Flex Spending Dependent Care	Before Tax	After Tax	Edit
Current: No Coverage			
New: Waive		0.00	
Pet Assure	Before Tax	After Tax	Edit
Current: No Coverage			
New: Waive			

This table summarizes estimated costs for your new benefit choices.

Election Summary			
Summarized estimates for new Benefit Elections	Total	Before Tax	After Tax
Costs	210.20	202.44	7.76
Your Costs	210.20	202.44	7.76

These costs do not include certain choices that are based on variable earnings.

Step	Action
69.	Click the Edit button to the right of Flex Spending Health – U.S. 

Benefits Enrollment

Flex Spending Health - U.S.

Hyacinth Bloom

The Health Care Spending Account (HCSA) allows you to use pre-tax dollars to pay for expenses that are not 100 percent covered through your or your spouse's group health care plans.

i Important! Your current coverage is: No Coverage. Coverage for this plan will be waived if you do not make an election.

Select an Option

No, I do not want to enroll

Healthcare Spending Acct

Update Elections Discard Changes

Step	Action
70.	<p>A Health Reimbursement Account and Flex Spending Account allows you to set aside pre-tax dollars to help pay for expenses that are not 100% covered through your or your spouse's group health care plans.</p> <p>If you are enrolling in an FSA Account such as Health and Dependent Care, you will need to specify an annual amount. This amount will be divided by the paychecks left for the year to come up with a bi-weekly pre-tax deduction and deposited into your FSA account to assist with qualified expenses.</p>
71.	<p>To enroll in coverage, click the radio button to the left of Healthcare Spending Acct.</p> <p><input type="radio"/></p>
72.	<p>Enter the desired information into the Annual Pledge field.</p>
73.	<p>Click the Update Elections button.</p> <p><input type="button" value="Update Elections"/></p>

Benefits Enrollment

Flex Spending Health - U.S.

Hyacinth Bloom

i Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Your Choice

You have chosen to enroll in the Healthcare Spending Acct plan with an annual pledge of \$1,000.00.

Your Contributions

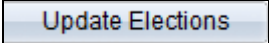
Your approximate per-pay-period contribution will be \$500.00.

Notes

Once submitted, this choice will take effect on 12/01/2014.


Deductions and/or Credits for this choice will start with the pay period beginning 11/30/2014.

Update Elections Discard Changes

Step	Action
74.	Review your selection, including your annual and pay-per-period contribution. Click Discard Changes to return and change your choices. Click Update Elections to save your choices.
75.	Click the Update Elections button. 

Benefits Enrollment

New Hire

Hyacinth Bloom 

As a new hire you must enroll in benefits within 31 days from your date of hire. If you do not enroll it may result in no coverage for yourself and any dependents. The only time you can change your benefit choices is during Open Enrollment or if you have a qualified family status change.

i Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Enrollment Summary			
	Before Tax	After Tax	Edit
Medical			<input type="button" value="Edit"/>
Current: No Coverage			
New: AvMed Health Plan:Family	179.29		
Dental			<input type="button" value="Edit"/>
Current: No Coverage			
New: MeLife SafeGuard Basic Plus:Family	11.31		
Vision			<input type="button" value="Edit"/>
Current: No Coverage			
New: CompBenefits Vision Care Plan:Family	7.15		
Legal Services			<input type="button" value="Edit"/>
Current: No Coverage			
New: Guardian Legal Classic:Empl Only	3.15		

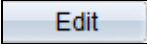
Step	Action
76.	Scroll down the page.

Flex Spending Health - U.S.	Before Tax	After Tax	<input type="button" value="Edit"/>
Current: No Coverage			
New: Healthcare Spending Acct: \$1,000.00	500.00		
Flex Spending Dependent Care	Before Tax	After Tax	<input type="button" value="Edit"/>
Current: No Coverage			
New: Waive	0.00		
Pet Assure	Before Tax	After Tax	<input type="button" value="Edit"/>
Current: No Coverage			
New: Waive			

This table summarizes estimated costs for your new benefit choices.

Election Summary			
Summarized estimates for new Benefit Elections	Total	Before Tax	After Tax
Costs	710.20	702.44	7.76
Your Costs	710.20	702.44	7.76

These costs do not include certain choices that are based on variable earnings.

Step	Action
77.	Click the Edit button to the right of Flex Spending Dependent Care. 

Benefits Enrollment

Flex Spending Dependent Care

Hyacinth Bloom


The Dependent Care Spending Care (DCSA) allows you to use pre-tax dollars to pay for eligible dependent daycare, which gives you and your spouse the option to work.

i Important! Your current coverage is: No Coverage. Coverage for this plan will be waived if you do not make an election.

Select an Option

No, I do not want to enroll

Dependent Care Spending Account

Step	Action
78.	A Dependent Care Spending Account allows you to set aside pre-tax dollars to help pay for eligible dependent daycare.
79.	To enroll in coverage, click the radio button to the left of Dependent Care Spending Account. 

Benefits Enrollment

Flex Spending Dependent Care

Hyacinth Bloom

The Dependent Care Spending Care (DCSA) allows you to use pre-tax dollars to pay for eligible dependent daycare, which gives you and your spouse the option to work.

i Important! Your current coverage is: No Coverage. Coverage for this plan will be waived if you do not make an election.

Your annual pledge must be between \$50.00 and \$5,000.00, which are the limits established for this plan. You must not exceed \$999,999.99 when you add up your annual pledge amounts for all Flexible Spending Accounts.

Select an Option

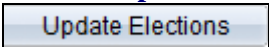
No, I do not want to enroll

Dependent Care Spending Account

This plan requires that you specify an annual pledge amount.

Annual Pledge: [Worksheet](#) Select the **Worksheet** button to help calculate your annual pledge for this plan year.

Step	Action
80.	Enter the desired information into the Annual Pledge field.

Step	Action
81.	Click the Update Elections button. 

Benefits Enrollment

Flex Spending Dependent Care

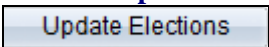
Hyacinth Bloom

i Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Your Choice
 You have chosen to enroll in the Dependent Care Spending Account plan with an annual pledge of \$900.00.


Your Contributions
 Your approximate per-pay-period contribution will be \$450.00.

Notes
 Once submitted, this choice will take effect on 12/01/2014.
 Deductions and/or Credits for this choice will start with the pay period beginning 11/30/2014.

Step	Action
82.	Review your selection, including your annual and pay-per-period contribution. Click Discard Changes to return and change your choices. Click Update Elections to save your choices.
83.	Click the Update Elections button. 

Benefits Enrollment

New Hire

Hyacinth Bloom 

As a new hire you must enroll in benefits within 31 days from your date of hire. If you do not enroll it may result in no coverage for yourself and any dependents. The only time you can change your benefit choices is during Open Enrollment or if you have a qualified family status change.

i Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Enrollment Summary

	Before Tax	After Tax	
Medical			<input type="button" value="Edit"/>
Current: No Coverage			
New: AvMed Health Plan:Family	179.29		
Dental			<input type="button" value="Edit"/>
Current: No Coverage			
New: MetLife SafeGuard Basic Plus:Family	11.31		
Vision			<input type="button" value="Edit"/>
Current: No Coverage			
New: CompBenefits Vision Care Plan:Family	7.15		
Legal Services			<input type="button" value="Edit"/>
Current: No Coverage			
New: Guardian Legal Classic:Empl Only		3.15	

Step	Action
84.	Scroll down the page.

Flex Spending Dependent Care Before Tax After Tax

Current: No Coverage
 New: Dependent Care Spending Account: \$900.00 450.00

Pet Assure Before Tax After Tax

Current: No Coverage
 New: Waive

This table summarizes estimated costs for your new benefit choices.

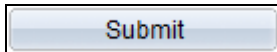
Election Summary			
Summarized estimates for new Benefit Elections	Total	Before Tax	After Tax
Costs	1,160.20	1,152.44	7.76
Your Costs	1,160.20	1,152.44	7.76

These costs do not include certain choices that are based on variable earnings.

Select the **Submit** button to send your final choices to the Benefits Department.

Important: Your enrollment will not be complete until you **Submit** your choices to the Benefits Department.

Step	Action
85.	Before submitting, be sure to review the Election Summary table. This table contains the summarized estimated costs for your new elections.
86.	Click the Submit button.



Benefits Enrollment

Submit Benefit Choices

Hyacinth Bloom

You have almost completed your enrollment. If you have no further changes, select the **Submit** button at the bottom of this page to finalize your benefit choices.

Select the **Cancel** button if you are not ready to submit your choices and wish to return to the Enrollment Summary.

Do not submit your benefit choices until you have completed your enrollment. You may store your choices on each page and return to the Enrollment Summary as many times as you'd like up until your enrollment deadline. However, once you select the Submit button your benefit choices will be sent to the Benefits Department for processing.

Once your enrollment is processed, you may not be able to make any further benefit changes until the next Open Enrollment period or if you have a qualified family status change.

Authorize Elections

By submitting your benefit choices you are authorizing the company to take deductions from your paycheck to pay for your benefit costs. You are also authorizing the Benefits Department to send necessary personal information to your selected providers to initiate and support your coverage.

Step	Action
87.	Before submitting your benefit choices, please read the information on this page.

Step	Action
88.	Click the Submit button to send your final choices to the Benefits Department. <input type="button" value="Submit"/>

Message

Please certify dependents' use of tobacco products. (21004,7)

You are certifying that your responses in regards to the use of tobacco products by all of your dependents are truthful. In order to be eligible for the Non-Smoker rates, neither you nor any of your dependents over the age of 18 can use tobacco products.

I understand the requirements for my dependents regarding their use of tobacco products. You cannot submit until you have agreed.

Step	Action
89.	Click the Yes button. <input type="button" value="Yes"/>

Benefits Enrollment

Submit Confirmation

Hyacinth Bloom


Your benefit choices have been successfully submitted to the Benefits Department. You will receive a confirmation statement within one week to confirm your new hire enrollment. To return to the Benefits Enrollment page, use the OK button.

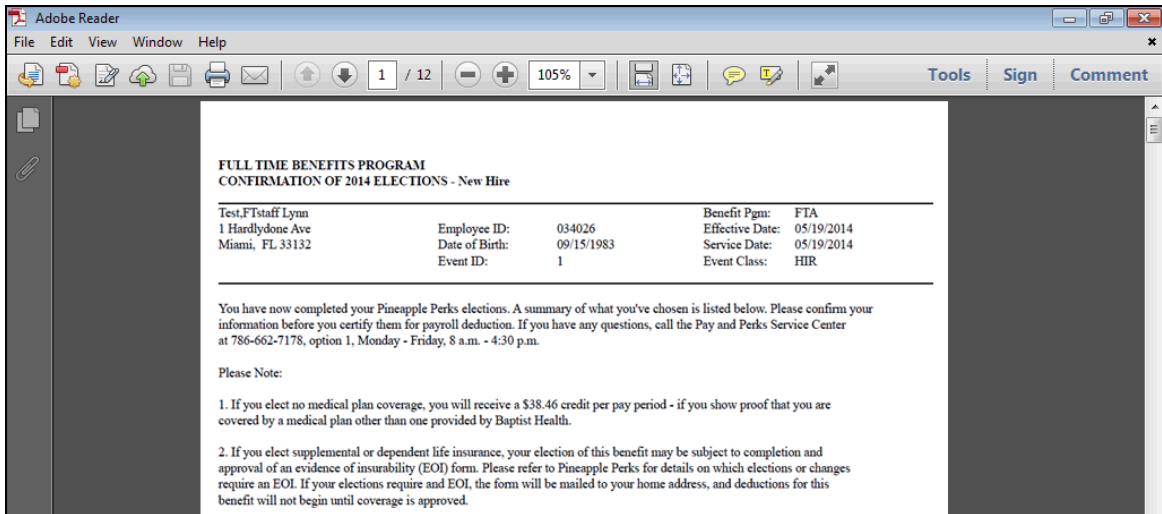
Step	Action
90.	Click the Print button. <input type="button" value="Print"/>



Queued

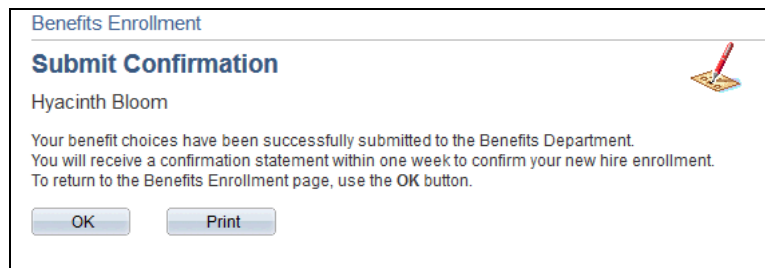
Process Name:

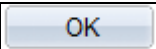
Process Instance: **Process Type:**

Step	Action
91.	A new window opens confirming that the process for printing your confirmation statement has been queued. Once the process has run, your confirmation statement will open as a PDF.
92.	Click the Close button. 



Step	Action
93.	The system opens a PDF of the confirmation statement. The Confirmation Statement includes information on the following: confirmation of elections, selected benefit plan and option, coverage category, base amounts and pay period deductions. You can also review dependents and beneficiaries for each benefit plan.
94.	Click the Print button. 
95.	Once you have reviewed and printed your confirmation statement, click the Close button. 





Step	Action
96.	Click the OK button. 

Benefits Enrollment

Hyacinth Bloom

After your initial enrollment, the only time you may change your benefit choices is during open enrollment or a qualified family status change.
 The Information icon provides you with additional information about your enrollment.
 The Select button next to an event means it is currently open for enrollment.
 Use the **Select** button to begin your enrollment.

Note: Some events may be temporarily closed until you have completed enrollment for a prior event.

Open Benefit Events				
Event Description		Event Date	Event Status	Job Title
New Hire		09/29/2014	Submitted	Intl Phy Rel Specialist
				

After you use the Select button, it will take a few seconds for your benefits enrollment information to load.

Step	Action
97.	Notice, the event status is now set to Submitted.
98.	Congratulations. You have elected benefits during open enrollment. End of Procedure.

Identifying Beneficiaries

Navigation: Main Menu > HCM > Self Service > Benefits > Dependent/Beneficiary Info > Benefits Summary

Purpose: Use this transaction to practice identifying and adding a beneficiary.

Benefits Summary
Joshua Lyman

To view your benefits as of another date, enter the date and select Go.

10/08/2014

Benefits Summary		
Type of Benefit	Plan Description	Coverage or Participation
Medical	AvMed Health Plan	Employee + Child(ren)
Dental	MetLife SafeGuard Basic Plus	Family
Vision	CompBenefits Vision Care Plan	Employee + 1 Depend
Legal Services		Waived
Basic Life	Basic Life	\$10,000
Supplemental Life		Waived
Basic ADD	Basic AD&D	\$10,000
Dependent Life - Child		Waived
Supplemental AD and D		Waived
Dependent Life Spouse		Waived

Step	Action
1.	On the Benefits Summary page, you can review your current benefit information. To add a beneficiary, click the appropriate link from the Type of Benefit column.
2.	In this example, you will add a beneficiary to Basic Life. Click the Basic Life link. Basic Life

Basic Life
Joshua Lyman

To view your benefits as of another date, enter the date and select Go.

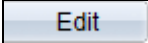
10/08/2014

Basic Life

Plan Name: Basic Life
Plan Provider: UNUM LIFE INSURANCE COMPANY
Coverage Level: \$10000
Group Number:
Customer Service: Extension:

Covered Beneficiaries
 You do not have any beneficiaries as of the date above. Select Edit if you would like to change or add beneficiaries

[Return to Employee Benefit Summary](#)

Step	Action
3.	Currently, you do not have any beneficiaries. Click the Edit button to add beneficiaries.
4.	Click the Edit button. 

Change Current Beneficiaries and Allocations

Basic Life **Basic Life**

Joshua Lyman

To change the allocations for your current beneficiaries, choose an Allocation type. An individual can not be both a primary and a secondary beneficiary. Enter an amount or percent.

To add a new beneficiary, use the Add a New Beneficiary button.

Allocation Type

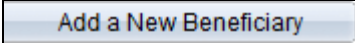
Enter Primary Allocations as:

Enter Secondary Allocations as:

Allocation Details						
Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation	
<input type="checkbox"/> Sam Lyman	Child			<input type="text"/>	<input type="text"/>	
<input type="checkbox"/> Toby Lyman	Child			<input type="text"/>	<input type="text"/>	
<input type="checkbox"/> Abby Lyman	Child			<input type="text"/>	<input type="text"/>	

0
0

[Return to Life Insurance Main](#)

Step	Action
5.	Use the Change Current Beneficiaries and Allocations page to select beneficiaries to receive life insurance proceeds in the event of your death.
6.	Click the Add a New Beneficiary button. 

Dependent/Beneficiary Personal Information

Joshua Lyman


Select Save once you have added your Dependent/Beneficiary's personal information. This information will go into effect as of Oct 8, 2014.


Personal Information


*First Name:


Middle Name:

*Last Name:


Name Prefix: 

Name Suffix: 



Date of Birth: 



*Gender: 



SSN: (Social Security Number)



*Relationship to Employee: 

Status Information

*Marital Status:  As of: 

Student:  As of: 




Disabled:  As of: 

Smoker:  As of: 

Address and Telephone

Same Address as Employee

Country: United States
Address: 17894 SW 13 STREET
PEMBROKE PINES, FL 33029
BROWARD

Step	Action
7.	Enter the desired information into the First Name field.
8.	Enter the desired information into the Last Name field.
9.	Enter the desired information into the Date of Birth field.
10.	Click the button to the right of the Gender field. 
11.	Click the appropriate Gender list item.
12.	If you do not know the Social Security Number, or your beneficiary does not have one, you can leave this blank. After saving their information, you will be asked for a reason why there is no Social Security Number listed.
13.	Enter the desired information into the SSN field.
14.	Click the button to the right of the Relationship to Employee field. 
15.	Click the appropriate Relationship list item.
16.	Click the button to the right of the Marital Status field. 
17.	Click the appropriate Marital Status list item.

Step	Action
18.	Scroll down the page.

Name Suffix:

Date of Birth:

*Gender:

SSN: (Social Security Number)

*Relationship to Employee:

Status Information

*Marital Status: As of:

Student: As of:

Disabled: As of:

Smoker: As of:

Address and Telephone


Same Address as Employee

Country: United States

Address: 17894 SW 13 STREET
PEMBROKE PINES, FL 33029
BROWARD

Same Phone as Employee

Phone:

Step	Action
19.	In the Address and Telephone section, click the Same Address as Employee option if your beneficiary has the same address and/or phone number. In this example, deselect the option to enter a different address or telephone number.
20.	Deselect the Same Address as Employee option. 

Address and Telephone

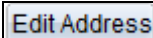
Same Address as Employee

Country: United States [Change Country](#)

Address:

Same Phone as Employee

Phone:

Step	Action
21.	Click the Edit Address button. 


Edit Address

Country: United States [Change Country](#)

Address 1:

Address 2:

Address 3:

City: State: 

Postal:

County:

Step	Action
22.	Enter the desired information into the Address 1 field.
23.	Enter the desired information into the City field.
24.	Enter the desired information into the State field.
25.	Enter the desired information into the Postal field.
26.	Click the OK button. <input type="button" value="OK"/>

Same Address as Employee

Country: United States [Change Country](#)

Address: 28391 Royal Green Way [Edit Address](#)
Muskegon, MI 27080


Same Phone as Employee


Phone:

Step	Action
27.	Enter the desired information into the Phone field.
28.	Click the Save button. <input type="button" value="Save"/>

Personal Information

Save Confirmation

 The Save was successful.

Step	Action
29.	Click the OK button. 

Same Address as Employee

Country: United States
Address: 28391 Royal Green Way
Muskegon, MI 27080

Same Phone as Employee

Phone: 331/595-8569

[Return to Change Current Beneficiaries and Allocations](#)

Step	Action
30.	Click the Return to Change Current Beneficiaries and Allocations link.

Change Current Beneficiaries and Allocations

Basic Life **Basic Life**

Joshua Lyman

To change the allocations for your current beneficiaries, choose an Allocation type. An individual can not be both a primary and a secondary beneficiary. Enter an amount or percent.

To add a new beneficiary, use the Add a New Beneficiary button.

Allocation Type:

Enter Primary Allocations as:

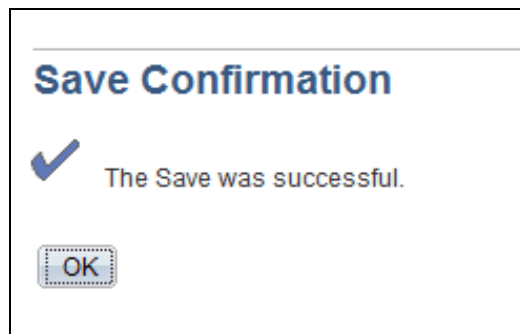
Enter Secondary Allocations as:

Allocation Details						
	Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
<input type="checkbox"/>	Sam Lyman	Child			<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Toby Lyman	Child			<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Abby Lyman	Child			<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Anna Alvarez	Sibling			<input type="text"/>	<input type="text"/>

0 0

[Return to Life Insurance Main](#)

31.	You should name a primary beneficiary, as well as a contingent (secondary) beneficiary, in case your primary beneficiary dies with you. If the allocation is for more than one beneficiary, the amount must equal 100% for primary and the same will apply for the contingent beneficiaries.
32.	Click the checkbox to the left of the appropriate beneficiary. <input type="checkbox"/>
33.	Enter the desired information into the New Secondary Allocation field.
34.	Click the checkbox to the left of the appropriate beneficiary. <input type="checkbox"/>
35.	Enter the desired information into the New Primary Allocation field.
36.	Click the Update Totals button. <input type="button" value="Update Totals"/>
37.	Click the Save button. <input type="button" value="Save"/>



Step	Action
38.	Click the OK button. <input type="button" value="OK"/>

To add a new beneficiary, use the Add a New Beneficiary button.

Allocation Type

Enter Primary Allocations as:

Enter Secondary Allocations as:

Allocation Details						
	Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
<input type="checkbox"/>	Anna Alvarez	Sibling	100		<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Sam Lyman	Child		100	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Toby Lyman	Child			<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Abby Lyman	Child			<input type="text"/>	<input type="text"/>

0 0

[Return to Life Insurance Main](#)

Step	Action
39.	Notice the Allocation Details table has been updated.
40.	Click the Return to Life Insurance Main link.

Basic Life
 Joshua Lyman
 To view your benefits as of another date, enter the date and select Go.
 10/08/2014

Basic Life

Plan Name: Basic Life
 Plan Provider: UNUM LIFE INSURANCE COMPANY
 Coverage Level: \$10000
 Group Number:
 Customer Service: Extension:

Covered Beneficiaries
 Select Edit to change your current beneficiary allocations. Select the beneficiary's name to edit the individual's personal information.

Dep/Ben Coverage Details

Name	Relationship	Primary Allocation	Secondary Allocation
Alvarez, Anna	Sibling	100%	

[Return to Employee Benefit Summary](#)

Step	Action
41.	Click the Return to Employee Benefit Summary link.
Step	Action
42.	Congratulations. You have identified and added a beneficiary. End of Procedure.


Viewing Current Benefits

Navigation: Main Menu > HCM > Self Service > Benefits > Benefits Summary

Purpose: Use this transaction to practice viewing all of your current benefit information through self service.

Benefits Summary
 Joshua Lyman

To view your benefits as of another date, enter the date and select Go.

11/05/2014 

Benefits Summary		
Type of Benefit	Plan Description	Coverage or Participation
Medical	AvMed Health Plan	Family
Dental	MetLife SafeGuard Basic Dental	Family
Vision	EyeMed Vision Plan	Family
Legal Services		Waived
Basic Life	Basic Life	\$10,000
Supplemental Life	SuppLife 3x Base Pay	Salary X 3
Basic ADD	Basic AD&D	\$10,000

Step	Action
1.	<p>Use the Benefits Summary page to view a list of all the benefits in which you have enrolled.</p> <p>This page will display different benefit types depending on which benefits an organization provides, and your current coverage.</p>
2.	<p>When reviewing benefits information, it is always displayed as of the date indicated at the top of the page. The date defaults to the current system date.</p> <p>To view the information as of a different date, you can override the date and click the Go button.</p>
3.	<p>To view the details of a benefit, click the appropriate Type of Benefit link.</p> <p>In this example, click the Medical link.</p>

Medical

Joshua Lyman
To view your benefits as of another date, enter the date and select Go.

11/05/2014

Medical

Plan Name: AvMed Health Plan
Plan Provider: [AVMED INC](#)
Coverage: Family
Group Number: 120500
Customer Service: **Extension:**


Covered Dependents

Name	Relationship
Sam Lyman	Child
Toby Lyman	Child
Donna Lyman	Spouse

Additional Information

[Find a Health Care Provider](#)
[Return to Employee Benefit Summary](#)

Step	Action
4.	Use the Medical page to view a summary of the current plan in which you are enrolled.
5.	From this page, you can click the Plan Provider link. This will open a new browser window that displays information about the health care provider. In this example, the current provider is AvMed Insurance. In this example, click the AVMED INC link. AVMED INC

Step	Action
6.	In this example, a new browser window opens displaying AvMed. Use this window to search for information about the provider and the provider's health plans.
7.	Click the Close button. 

Medical

Joshua Lyman
 To view your benefits as of another date, enter the date and select Go.

11/05/2014 

Medical

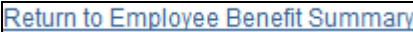
Plan Name: AvMed Health Plan
 Plan Provider: [AVMED INC](#)
 Coverage: Family
 Group Number: 120500
 Customer Service: Extension:

Covered Dependents

Name	Relationship
Sam Lyman	Child
Toby Lyman	Child
Donna Lyman	Spouse

Additional Information

[Find a Health Care Provider](#)
[Return to Employee Benefit Summary](#)

Step	Action
8.	The Medical page also displays a list of the covered dependents. Click the dependent's name to view and edit the individual's personal information.
9.	Click the Return to Employee Benefit Summary link. 

Benefits Summary
Joshua Lyman

To view your benefits as of another date, enter the date and select Go.

11/05/2014

Benefits Summary		
Type of Benefit	Plan Description	Coverage or Participation
Medical	AvMed Health Plan	Family
Dental	MetLife SafeGuard Basic Dental	Family
Vision	EyeMed Vision Plan	Family
Legal Services		Waived
Basic Life	Basic Life	\$10,000
Supplemental Life	SuppLife 3x Base Pay	Salary X 3
Basic ADD	Basic AD&D	\$10,000

Step	Action
10.	Next, you will view your Dental benefits. Click the Dental link. Dental

Dental
Joshua Lyman

To view your benefits as of another date, enter the date and select Go.

11/05/2014

Dental

Plan Name: MetLife SafeGuard Basic Dental

Plan Provider: METLIFE

Coverage: Family

Group Number:

Customer Service: Extension:

Covered Dependents	
Name	Relationship
Sam Lyman	Child
Toby Lyman	Child
Donna Lyman	Spouse

[Additional Information](#)

[Return to Employee Benefit Summary](#)

Step	Action
11.	Use the Dental page to view a summary of the current plan in which you are enrolled.

Step	Action
12.	From this page, you can click the Plan Provider link to open a new browser window that displays information about the dental care provider. This works the same as on the Medical page.
13.	This page also displays a list of the covered dependents. Click the dependent's name to view and edit the dependent's personal information.
14.	Click the Return to Employee Benefit Summary link. Return to Employee Benefit Summary

Benefits Summary

Joshua Lyman

To view your benefits as of another date, enter the date and select Go.

11/05/2014

Benefits Summary		
Type of Benefit	Plan Description	Coverage or Participation
Medical	AvMed Health Plan	Family
Dental	MetLife SafeGuard Basic Dental	Family
Vision	EyeMed Vision Plan	Family
Legal Services		Waived
Basic Life	Basic Life	\$10,000
Supplemental Life	SuppLife 3x Base Pay	Salary X 3
Basic ADD	Basic AD&D	\$10,000

Step	Action
15.	Next, you will view your Vision benefits. Click the Vision link. Vision

Vision
 Joshua Lyman
 To view your benefits as of another date, enter the date and select Go.

Vision

Plan Name: EyeMed Vision Plan
 Plan Provider: EYEMED VISION CARE
 Coverage: Family
 Group Number:
 Customer Service: Extension:

Covered Dependents	
Name	Relationship
Sam Lyman	Child
Toby Lyman	Child
Donna Lyman	Spouse

[Return to Employee Benefit Summary](#)

Step	Action
16.	Use the Vision page to view a summary of the current plan in which you are enrolled.
17.	From this page, you can click the Plan Provider link to open a new browser window that displays information about the vision care provider. This works the same as on the Medical page.
18.	This page also displays a list of the covered dependents. Click the dependent's name to view and edit the individual's personal information.
19.	Click the Return to Employee Benefit Summary link. Return to Employee Benefit Summary

Benefits Summary
Joshua Lyman

To view your benefits as of another date, enter the date and select Go.

11/05/2014

Benefits Summary		
Type of Benefit	Plan Description	Coverage or Participation
Medical	AvMed Health Plan	Family
Dental	MetLife SafeGuard Basic Dental	Family
Vision	EyeMed Vision Plan	Family
Legal Services		Waived
Basic Life	Basic Life	\$10,000
Supplemental Life	SuppLife 3x Base Pay	Salary X 3
Basic ADD	Basic AD&D	\$10,000

Step	Action
20.	Next, you will view your Life benefits. Click the Basic Life link. Basic Life

Basic Life
Joshua Lyman

To view your benefits as of another date, enter the date and select Go.

11/05/2014

Basic Life

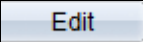
Plan Name: Basic Life
Plan Provider: UNUM LIFE INSURANCE COMPANY
Coverage Level: \$10000
Group Number:
Customer Service: Extension:

Covered Beneficiaries
Select Edit to change your current beneficiary allocations. Select the beneficiary's name to edit the individual's personal information.

Dep/Ben Coverage Details			
Name	Relationship	Primary Allocation	Secondary Allocation
Sam Lyman	Child		50%
Donna Lyman	Spouse	100%	
Toby Lyman	Child		50%

[Return to Employee Benefit Summary](#)

Step	Action
21.	Use the Basic Life page to view a summary of the current plan in which you are enrolled.
22.	This page also displays a list of the covered beneficiaries and his or her associated allocation percent or amount.

Step	Action
23.	To change the allocation, click the Edit button. 

Change Current Beneficiaries and Allocations

Basic Life **Basic Life**

Joshua Lyman

To change the allocations for your current beneficiaries, choose an Allocation type. An individual can not be both a primary and a secondary beneficiary. Enter an amount or percent.

To add a new beneficiary, use the Add a New Beneficiary button.

Allocation Type

Enter Primary Allocations as:

Enter Secondary Allocations as:

Allocation Details						
	Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
<input type="checkbox"/>	Sam Lyman	Child		50	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Donna Lyman	Spouse	100		<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Toby Lyman	Child		50	<input type="text"/>	<input type="text"/>
					0	0

[Return to Life Insurance Main](#)

Step	Action
24.	Use the Change Current Beneficiaries and Allocations page to add new beneficiaries and modify the primary and secondary allocation percents/amounts.
25.	In this example, you do not want to make any changes. Click the Return to Life Insurance Main link. Return to Life Insurance Main

Basic Life

Joshua Lyman

To view your benefits as of another date, enter the date and select Go.

Basic Life

Plan Name: Basic Life
Plan Provider: UNUM LIFE INSURANCE COMPANY
Coverage Level: \$10000
Group Number:
Customer Service: Extension:

Covered Beneficiaries

Select Edit to change your current beneficiary allocations. Select the beneficiary's name to edit the individual's personal information.

Dep/Ben Coverage Details			
Name	Relationship	Primary Allocation	Secondary Allocation
Sam Lyman	Child		50%
Donna Lyman	Spouse	100%	
Toby Lyman	Child		50%

[Return to Employee Benefit Summary](#)

Step	Action
26.	Click the beneficiary's name to view and edit the individual's personal information.
27.	Click the Return to Employee Benefit Summary link. Return to Employee Benefit Summary

Benefits Summary

Joshua Lyman

To view your benefits as of another date, enter the date and select Go.

11/05/2014

Benefits Summary		
Type of Benefit	Plan Description	Coverage or Participation
Medical	AvMed Health Plan	Family
Dental	MetLife SafeGuard Basic Dental	Family
Vision	EyeMed Vision Plan	Family
Legal Services		Waived
Basic Life	Basic Life	\$10,000
Supplemental Life	SuppLife 3x Base Pay	Salary X 3
Basic ADD	Basic AD&D	\$10,000

Step	Action
28.	Next, you will view your Supplemental Life benefits. Click the Supplemental Life link. Supplemental Life

Supplemental Life

Joshua Lyman

To view your benefits as of another date, enter the date and select Go.

11/05/2014

Supplemental Life			
Plan Name:	SuppLife 3x Base Pay		
Plan Provider:	UNUM LIFE INSURANCE COMPANY		
Coverage Level:	Salary X 3		
Group Number:			
Customer Service:	Extension:		
Covered Beneficiaries			
Select Edit to change your current beneficiary allocations. Select the beneficiary's name to edit the individual's personal information.			
Dep/Ben Coverage Details			
Name	Relationship	Primary Allocation	Secondary Allocation
Sam Lyman	Child		50%
Donna Lyman	Spouse	100%	
Toby Lyman	Child		50%
<input type="button" value="Edit"/>			
Return to Employee Benefit Summary			

Step	Action
29.	Use the Supplemental Life page to view a summary of the current plan in which you are enrolled.
30.	This page also displays a list of the covered beneficiaries and his or her associated allocation percent or amount. Click the beneficiary's name to view and edit the individual's personal information.
31.	Click the Edit button to change the allocation. In this example, you do not want to change the allocation.
32.	Click the Return to Employee Benefit Summary link. Return to Employee Benefit Summary

Benefits Summary
Joshua Lyman

To view your benefits as of another date, enter the date and select Go.

11/05/2014

Benefits Summary		
Type of Benefit	Plan Description	Coverage or Participation
Medical	AvMed Health Plan	Family
Dental	MetLife SafeGuard Basic Dental	Family
Vision	EyeMed Vision Plan	Family
Legal Services		Waived
Basic Life	Basic Life	\$10,000
Supplemental Life	SuppLife 3x Base Pay	Salary X 3
Basic ADD	Basic AD&D	\$10,000

Step	Action
33.	Next, you will view your Accidental Death and Dismemberment benefits. Click the Basic ADD link. Basic ADD

Basic AD&D

Joshua Lyman
 To view your benefits as of another date, enter the date and select Go.
 11/05/2014

Basic AD&D

Plan Name: Basic AD&D
 Plan Provider: UNUM LIFE INSURANCE COMPANY
 Coverage Level: \$10000
 Group Number:
 Customer Service: Extension:

Covered Beneficiaries
 Select Edit to change your current beneficiary allocations. Select the beneficiary's name to edit the individual's personal information.

Dep/Ben Coverage Details


Name	Relationship	Primary Allocation	Secondary Allocation
Sam Lyman	Child		50%
Donna Lyman	Spouse	100%	
Toby Lyman	Child		50%

[Return to Employee Benefit Summary](#)

Step	Action
34.	Use the AD and D page to view a summary of the current plan in which you are enrolled.
35.	This page also displays a list of the covered beneficiaries and his or her associated allocation percent or amount. You can click the beneficiary's name to view and edit the individual's personal information. Click the Edit button to change the allocation.
36.	Click the Return to Employee Benefit Summary link. Return to Employee Benefit Summary

Benefits Summary
Joshua Lyman

To view your benefits as of another date, enter the date and select Go.


11/05/2014 

Type of Benefit	Plan Description	Coverage or Participation
Medical	AvMed Health Plan	Family
Dental	MetLife SafeGuard Basic Dental	Family
Vision	EyeMed Vision Plan	Family
Legal Services		Waived
Basic Life	Basic Life	\$10,000
Supplemental Life	SuppLife 3x Base Pay	Salary X 3
Basic ADD	Basic AD&D	\$10,000
Dependent Life - Child		Waived
Supplemental AD and D	Supp AD&D 5x Base Pay	Salary X 5

Step	Action
37.	<p>Next, you will view your Supplemental AD and D benefits.</p> <p>Click the Supplemental AD and D link.</p> <p>Supplemental AD and D</p>

Supplemental AD and D
Joshua Lyman

To view your benefits as of another date, enter the date and select Go.

11/05/2014 

Supplemental AD and D

Plan Name: Supp AD&D 5x Base Pay
Plan Provider: UNUM LIFE INSURANCE COMPANY
Coverage Level: Salary X 5
Group Number:
Customer Service: **Extension:**

Covered Beneficiaries
Select Edit to change your current beneficiary allocations. Select the beneficiary's name to edit the individual's personal information.

Name	Relationship	Primary Allocation	Secondary Allocation
Sam Lyman	Child		50%
Donna Lyman	Spouse	100%	
Toby Lyman	Child		50%

[Return to Employee Benefit Summary](#)

Step	Action
38.	The Supplemental AD and D page summarizes the current plan in which you are enrolled.
39.	This page also displays a list of the covered beneficiaries and his or her associated allocation percent or amount. Click the beneficiary's name to view and edit the individual's personal information. Click the Edit button to change the allocation.
40.	Click the Return to Employee Benefit Summary link. Return to Employee Benefit Summary

Benefits Summary
Joshua Lyman

To view your benefits as of another date, enter the date and select Go.

11/05/2014

Benefits Summary		
Type of Benefit	Plan Description	Coverage or Participation
Medical	AvMed Health Plan	Family
Dental	MetLife SafeGuard Basic Dental	Family
Vision	EyeMed Vision Plan	Family
Legal Services		Waived
Basic Life	Basic Life	\$10,000
Supplemental Life	SuppLife 3x Base Pay	Salary X 3
Basic ADD	Basic AD&D	\$10,000
Dependent Life - Child		Waived
Supplemental AD and D	Supp AD&D 5x Base Pay	Salary X 5
Dependent Life Spouse	Dependent Life for SP \$40K	\$40,000

Step	Action
41.	Next, you will review your Dependent Life Spouse benefits. Click the Dependent Life Spouse link. Dependent Life Spouse

Dependent Life Spouse

Joshua Lyman

To view your benefits as of another date, enter the date and select Go.

11/05/2014

Go

Dependent Life Spouse

Plan Name: Dependent Life for SP \$40K
Plan Provider: UNUM LIFE INSURANCE COMPANY
Coverage Level: \$40000 Per Dependent
Group Number:
Customer Service: Extension:

Covered Dependents

These are the dependents covered under this plan

Dep/Ben Coverage Details

Name	Relationship	Coverage	Coverage Level
Donna Lyman	Spouse		

[Return to Employee Benefit Summary](#)

42.	The Dependent Life Spouse page summarizes the current plan in which your dependent spouse is enrolled. This page also displays a list of the covered dependents and his or her coverage amount. In this example, there are no covered dependents for this benefit plan.
43.	Click the Return to Employee Benefit Summary link. Return to Employee Benefit Summary

Benefits Summary
Joshua Lyman

To view your benefits as of another date, enter the date and select Go.

11/05/2014

Benefits Summary		
Type of Benefit	Plan Description	Coverage or Participation
Medical	AvMed Health Plan	Family
Dental	MetLife SafeGuard Basic Dental	Family
Vision	EyeMed Vision Plan	Family
Legal Services		Waived
Basic Life	Basic Life	\$10,000
Supplemental Life	SuppLife 3x Base Pay	Salary X 3
Basic ADD	Basic AD&D	\$10,000
Dependent Life - Child		Waived
Supplemental AD and D	Supp AD&D 5x Base Pay	Salary X 5
Dependent Life Spouse	Dependent Life for SP \$40K	\$40,000
Short-Term Disability	Short Term Disability	60% of Salary
Long-Term Disability	Long Term Disability Non-Mgmt	60% of Salary
403(b)	403(b) Defined Contributions	4% Before Tax

Step	Action
44.	Next, you will view your Short-Term Disability benefits. Click the Short-Term Disability link. Short-Term Disability

Short-Term Disability
Joshua Lyman

To view your benefits as of another date, enter the date and select Go.

11/05/2014

Short-Term Disability

Plan Name: Short Term Disability

Plan Provider: UNUM LIFE INSURANCE COMPANY

Coverage Level: 60% Of Salary

Group Number:

Customer Service: **Ext:**

[Return to Employee Benefit Summary](#)

Step	Action
45.	Use the Short-Term Disability page to view a summary of your short-term disability benefit plan.

Step	Action
46.	Click the Return to Employee Benefit Summary link. Return to Employee Benefit Summary

Benefits Summary
Joshua Lyman

To view your benefits as of another date, enter the date and select Go.
11/05/2014

Benefits Summary		
Type of Benefit	Plan Description	Coverage or Participation
Medical	AvMed Health Plan	Family
Dental	MetLife SafeGuard Basic Dental	Family
Vision	EyeMed Vision Plan	Family
Legal Services		Waived
Basic Life	Basic Life	\$10,000
Supplemental Life	SuppLife 3x Base Pay	Salary X 3
Basic ADD	Basic AD&D	\$10,000
Dependent Life - Child		Waived
Supplemental AD and D	Supp AD&D 5x Base Pay	Salary X 5
Dependent Life Spouse	Dependent Life for SP \$40K	\$40,000
Short-Term Disability	Short Term Disability	60% of Salary
Long-Term Disability	Long Term Disability Non-Mgmt	60% of Salary

Step	Action
47.	Next, you will view your Long-Term Disability benefits. Click the Long-Term Disability link. Long-Term Disability

Long-Term Disability
Joshua Lyman

To view your benefits as of another date, enter the date and select Go.
11/05/2014

Long-Term Disability

Plan Name: Long Term Disability Non-Mgmt
Plan Provider: UNUM LIFE INSURANCE COMPANY
Coverage Level: 60% Of Salary
Group Number:

Customer Service: Ext:

[Return to Employee Benefit Summary](#)

Step	Action
48.	Use the Long-Term Disability page to view a summary of the plan in which you are enrolled.

Step	Action
49.	Click the Return to Employee Benefit Summary link. Return to Employee Benefit Summary

Benefits Summary
Joshua Lyman

To view your benefits as of another date, enter the date and select Go.

11/05/2014

Benefits Summary		
Type of Benefit	Plan Description	Coverage or Participation
Medical	AvMed Health Plan	Family
Dental	MetLife SafeGuard Basic Dental	Family
Vision	EyeMed Vision Plan	Family
Legal Services		Waived
Basic Life	Basic Life	\$10,000
Supplemental Life	SuppLife 3x Base Pay	Salary X 3
Basic ADD	Basic AD&D	\$10,000
Dependent Life - Child		Waived
Supplemental AD and D	Supp AD&D 5x Base Pay	Salary X 5
Dependent Life Spouse	Dependent Life for SP \$40K	\$40,000
Short-Term Disability	Short Term Disability	60% of Salary
Long-Term Disability	Long Term Disability Non-Mgmt	60% of Salary
403(b)	403(b) Defined Contributions	4% Before Tax

Step	Action
50.	Next, you will view your 403(b) plan benefits. Click the 403(b) link. 403(b)

403(b)
 Joshua Lyman

To view your benefits as of another date, enter the date and select Go.

11/05/2014

403(b)

Plan Name: 403(b) Defined Contributions
Plan Provider: DIVERSIFIED INVESTMENT ADVISOR
Group Number:
Customer Service: **Extension:**

Current Contributions

Before Tax: 4%
After Tax: 0%

Additional Information

[Fund Allocations](#)

[Return to Employee Benefit Summary](#)

Step	Action
51.	The 403(b) page summarizes the current plan in which you are enrolled. This is a view only page as all elections are made directly with the vendor.
52.	Click the Return to Employee Benefit Summary link. Return to Employee Benefit Summary
53.	Congratulations. You have successfully reviewed your benefit information. End of Procedure.

Updating Benefit Elections - Life Event (Birth)

Navigation: Main Menu > HCM > Self Service > Benefits > Life Events > Birth/Adoption

Purpose: Use this transaction to practice entering a life event and updating benefit elections as a result of the birth or adoption of a child.









Step	Action
1.	In this example, an employee is adding their new baby girl. We have signed into the PeopleSoft system as the employee (Daisy Plant) and will navigate through the process of adding the new dependent. There are a number of pages used to add a dependent. The steps involved in this process are displayed in the table at the bottom of the page. As you navigate through the page, read the information to familiarize yourself with the process.
2.	<p>You begin by selecting the life event and entering the date of the event. Typically when you adopt or give birth to a child, you also want to update other information like benefits coverage and tax withholding information.</p> <p>The pages in this life event guide you through all the steps necessary to ensure that your personal profile, benefits, and payroll information is updated to reflect the addition of a new dependent to your family. We will focus on the benefit information.</p>

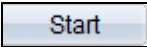
Birth/Adoption Start

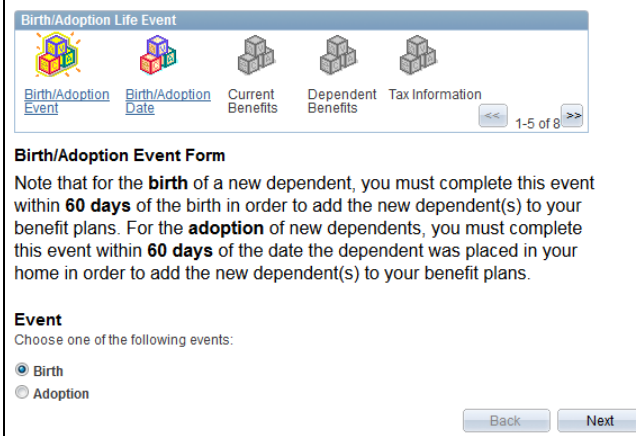
This is a good time to consider how having a new dependent may affect your health care coverage, life insurance, tax withholdings and other important choices.

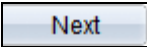
This guide will take you through all the steps necessary to ensure that your personal profile and benefits information is updated to reflect this event in your life.

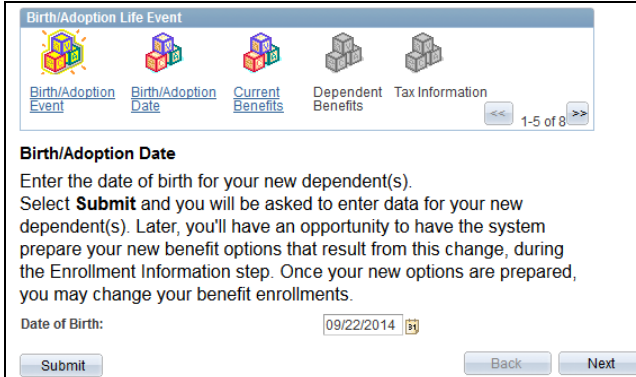
Select Start to begin or continue the life event process.

Birth Event Start	
	Description
	Birth/Adoption Event Select the appropriate family event.
	Birth/Adoption Date Enter your dependent's date of birth or the date the child was placed in your home for adoption.
	Current Benefits Review your current benefits summary.
	Dependent Benefits Review your current dependents and their benefits summary.
	Tax Information Review and update your federal tax forms.
	Direct Deposit Review and update your direct deposit information.
	Voluntary Deductions Review and update your voluntary deductions.
	Enrollment Information Find out how to add your new dependent or make

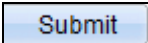
Step	Action
3.	Click the Start button. 

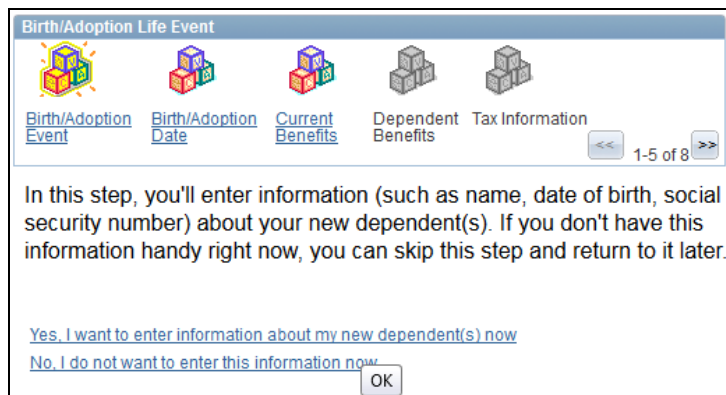


Step	Action
4.	Begin by entering the birth or adoption information. First, select either birth or adoption. In this exercise, Daisy has given birth to a daughter. Birth is the default.
5.	The first step is complete. Notice that the steps are displayed at the top of the page. The current step is active and highlighted. The next step in the process is also active. You can navigate to the next step in one of two ways: click the active link in the Birth/Adoption Life Event section or click the Next button at the bottom of the page.
6.	Click the Next button. 



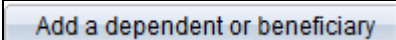
Step	Action
7.	Enter the desired information into the Date of Birth field.

Step	Action
8.	Click the Submit button. 



Step	Action
9.	Click the Yes, I want to enter information about my new dependent(s) now link.



Step	Action
10.	Click the Add a dependent or beneficiary button. 

Dependent/Beneficiary Personal Information

Daisy Plant


Select Save once you have added your Dependent/Beneficiary's personal information. This information will go into effect as of Sep 1, 2014.


Personal Information


*First Name:


Middle Name:

*Last Name:


Name Prefix: 

Name Suffix: 



Date of Birth: 



*Gender: 



SSN: (Social Security Number)



*Relationship to Employee: 

Status Information

*Marital Status:  As of: 

Student:  As of: 

Disabled:  As of: 



Smoker:  As of: 

Address and Telephone

Same Address as Employee

Country: United States

Address: 123 Main Street
Miami, FL 33186
Miami-Dade

Step	Action
11.	Enter the desired information into the First Name field.
12.	Enter the desired information into the Last Name field.
13.	Enter the desired information into the Date of Birth field.
14.	Click the button to the right of the Gender field. 
15.	Click the appropriate Gender list item.
16.	Daisy has not received the Social Security Number for her dependent. We will not enter a SSN at this time. When you save the information on this page, you will receive a message that the SSN is required. A Missing SSN Reason field will display under the Relationship to Employee field. You will select the reason why you cannot enter a SSN for the dependent.
17.	Click the button to the right of the Relationship to Employee field. 
18.	Click the Child list item.
19.	Scroll down the page.

Address and Telephone

Same Address as Employee

Country: United States
 Address: 123 Main Street
 Miami, FL 33186
 Miami-Dade

Same Phone as Employee

Phone:

[Return to Dependent/Beneficiary Summary](#)

Step	Action
20.	Click the Save button. <input type="button" value="Save"/>

Message

SSN is a required field. (22000,1)

Please enter the Dependent/Beneficiary's SSN before saving. If you do not have the Dependent/Beneficiary SSN at this time, please enter a valid reason before saving the page.

Step	Action
21.	Click the OK button. <input type="button" value="OK"/>

SSN: (Social Security Number)

*Relationship to Employee:

Missing SSN Reason:

Status Information

*Marital Status: As of:

Student: As of:

Disabled: As of:

Smoker: As of:

Address and Telephone


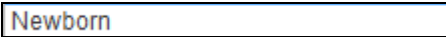
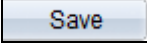
Same Address as Employee

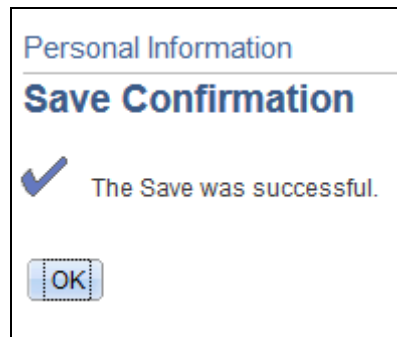
Country: United States
 Address: 10840 SW 119 Street
 Miami, FL 33176
 Miami-Dade


Same Phone as Employee


Phone:

[Return to Dependent/Beneficiary Summary](#)

Step	Action
22.	Click the button to the right of the Missing SSN Reason field. 
23.	Click the Newborn list item. 
24.	Click the Save button. The child is entered as a dependent and beneficiary. 



Step	Action
25.	Click the OK button. 

Date of Birth:	09/01/2014
Gender:	Female
Relationship to Employee:	Child
Missing SSN Reason:	Newborn
Status Information	
Marital Status:	Single
Student:	No
Disabled:	No
Smoker:	Non Smoker
Address and Telephone	
<input checked="" type="checkbox"/> Same Address as Employee	
Country:	United States
Address:	10840 SW 119 Street Miami, FL 33176 Miami-Dade
<input type="checkbox"/> Same Phone as Employee	
Phone:	
	
Return to Dependent/Beneficiary Summary	

Step	Action
26.	Click the Return to Dependent/Beneficiary Summary link. Return to Dependent/Beneficiary Summary

Add/Review Dep/Ben

Daisy Plant

The people listed below may be eligible for Benefit Coverage. Select a name to view or modify their personal information.

Dependent Information						
Name	Relationship to Employee	Date of Birth	Marital Status	Marital Status Date	Student	Disabled
Suzie Plant	Child	09/01/2014	Single		No	No

[Add a dependent or beneficiary](#)
[Return to Life Events - Birth/Adoption](#)

Step	Action
27.	Click the Return to Life Events - Birth/Adoption link. Return to Life Events - Birth/Adoption

Birth/Adoption Life Event

[Birth/Adoption Event](#)
[Birth/Adoption Date](#)
[Current Benefits](#)
[Dependent Benefits](#)
[Tax Information](#)

<< 1-5 of 8 >>

[Click here to continue with your Life Event](#)

Back Next

Step	Action
28.	Click the Click here to continue with your Life Event link. Click here to continue with your Life Event

Birth/Adoption Life Event

[Birth/Adoption Event](#)
[Birth/Adoption Date](#)
[Current Benefits](#)
[Dependent Benefits](#)
[Tax Information](#)

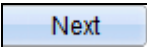
<< 1-5 of 8 >>

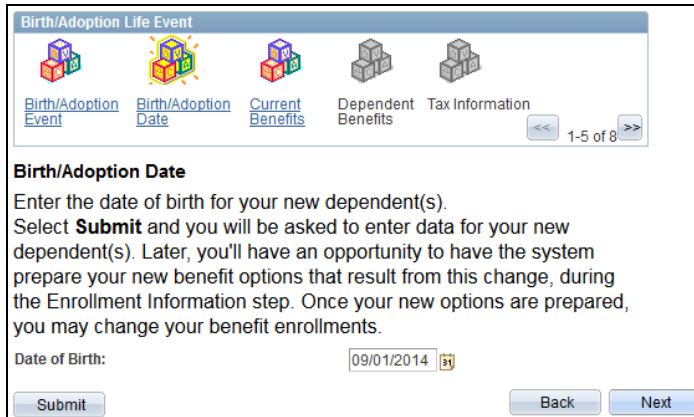
Birth/Adoption Date

*This information was submitted.
Select **Next** button to continue.*

09/01/2014

Submit Back Next

Step	Action
29.	Click the Next button. 



Birth/Adoption Life Event

Birth/Adoption Event | Birth/Adoption Date | Current Benefits | Dependent Benefits | Tax Information

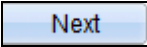
1-5 of 8

Birth/Adoption Date

Enter the date of birth for your new dependent(s).
 Select **Submit** and you will be asked to enter data for your new dependent(s). Later, you'll have an opportunity to have the system prepare your new benefit options that result from this change, during the Enrollment Information step. Once your new options are prepared, you may change your benefit enrollments.

Date of Birth:

Submit Back Next

Step	Action
30.	Click the Next button. 



Birth/Adoption Life Event

Birth/Adoption Event | Birth/Adoption Date | Current Benefits | Dependent Benefits | Tax Information

1-5 of 8

Benefits Summary

Daisy Plant

To view your benefits as of another date, enter the date and select Go.

09/01/2014 Go

Type of Benefit	Plan Description	Coverage or Participation
Medical	United Open Access Plan	Employee Only
Dental		Waived
Vision		Waived
Legal Services		Waived

Step	Action
31.	Use the Benefits Summary page to review your current benefit coverage.
32.	Scroll down the page.

Business Travel Insurance	Business Travel	\$500,000
Short-Term Disability	Short Term Disability	60% of Salary
Long-Term Disability	Long Term Disability Non-Mgmt	60% of Salary
403(b)		Waived
PTO	Non-Mgmt PTO 0-15 yrs	-----

Step	Action
33.	Click the Next button. <input type="button" value="Next"/>

Birth/Adoption Life Event

[Birth/Adoption Event](#)
[Birth/Adoption Date](#)
[Current Benefits](#)
[Dependent Benefits](#)
[Tax Information](#)
<< 1-5 of 8 >>

Dependent and Beneficiary Coverage Summary

Daisy Plant

To view your benefits as of another date, enter the date and select Go.

You have no benefit enrollments as of the date entered.

Step	Action
34.	Use the Dependent and Beneficiary Coverage Summary page to view a summary of your current dependent and beneficiary coverage. Currently, this employee does not have any dependent benefit enrollments.
35.	Click the Next button. <input type="button" value="Next"/>

Birth/Adoption Life Event

[Birth/Adoption Event](#)
[Birth/Adoption Date](#)
[Current Benefits](#)
[Dependent Benefits](#)
[Tax Information](#)

1-5 of 8

W-4 Tax Information

Daisy Plant
Baptist Health South Florida

Social Security Number: 111-07-0001

You must complete Form W-4 so the Payroll Department can calculate the correct amount of tax to withhold from your pay. Federal income tax is withheld from your wages based on marital status and the number of allowances claimed on this form. You may also specify that an additional dollar amount be withheld. You can file a new Form W-4 anytime your tax situation changes and you choose to have more, or less, tax withheld.

Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.

Home Address

123 Main Street
Miami FL 33186

W-4 Tax Data

Enter total number of Allowances you are claiming:

Step	Action
36.	Use the W-4 Tax Information page to review and edit your W-4 Tax Data including marital status, number of allowances, and any additional money to be withheld.
37.	Scroll down the page.

W-4 Tax Data

Enter total number of Allowances you are claiming:

Enter Additional Amount, if any, you want withheld from each paycheck:

Indicate Marital Status: Single Married

Check here and select Single status if married but withholding at single rate.
Note: If married, but legally separated, or spouse is a nonresident alien, select 'Single' status.

Check here if your last name differs from that shown on your social security card.
You must call 1-800-772-1213 for a new card.

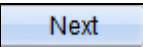
Claim Exemption

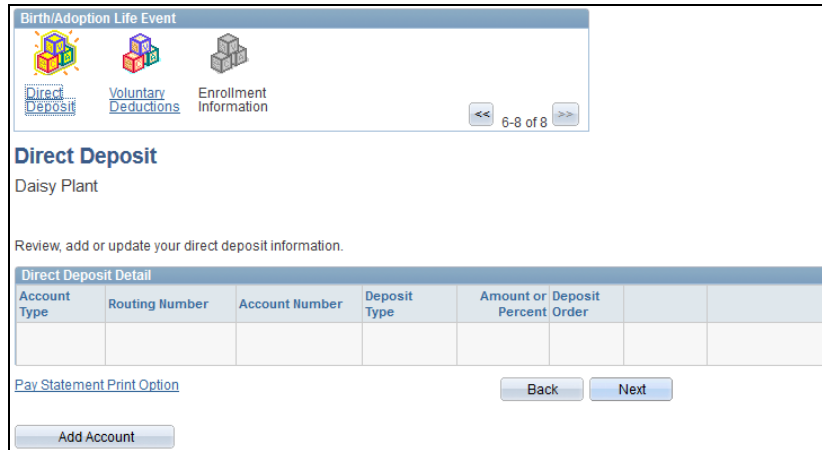
I claim exemption from withholding for the year and I certify that I meet BOTH of the following conditions for exemption:

1. Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability.
2. This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.

Check this box if you meet both conditions to claim exempt status.

Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

Step	Action
38.	Click the Next button. 



Birth/Adoption Life Event

Direct Deposit Voluntary Deductions Enrollment Information

6-8 of 8

Direct Deposit

Daisy Plant

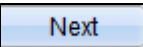
Review, add or update your direct deposit information.

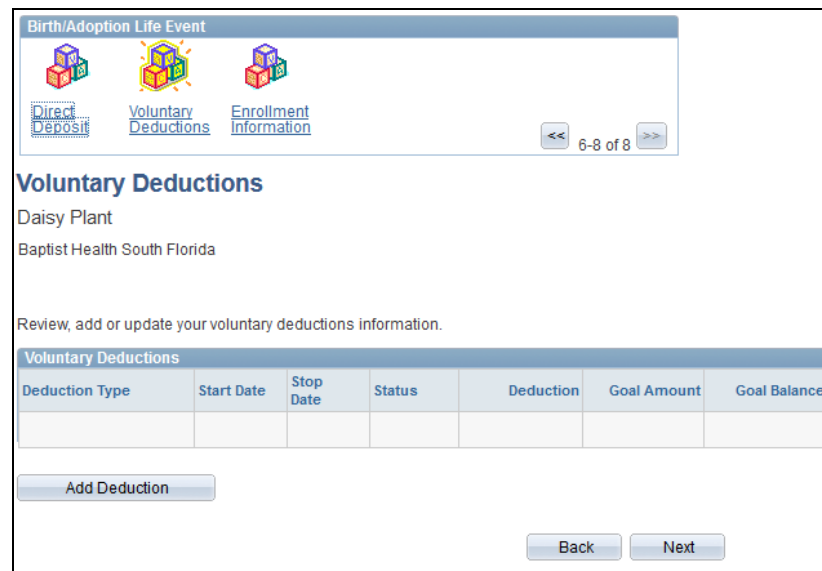
Direct Deposit Detail						
Account Type	Routing Number	Account Number	Deposit Type	Amount or Deposit Percent	Order	

Pay Statement Print Option

Back Next

Add Account

Step	Action
39.	Use the Direct Deposit page to review, add, or update your direct deposit information.
40.	Click the Next button. 



Birth/Adoption Life Event

Direct Deposit Voluntary Deductions Enrollment Information

6-8 of 8

Voluntary Deductions

Daisy Plant

Baptist Health South Florida

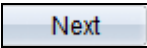
Review, add or update your voluntary deductions information.

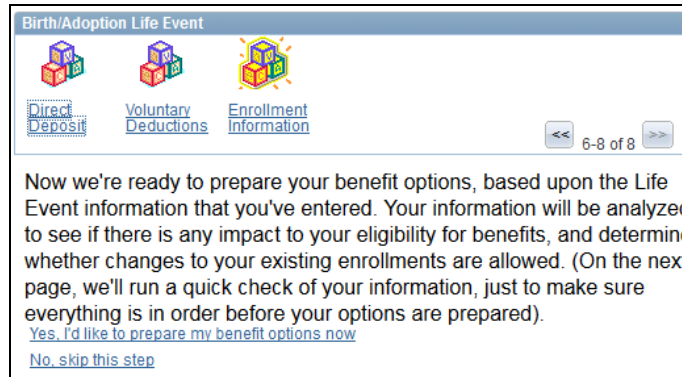
Voluntary Deductions						
Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance


Add Deduction

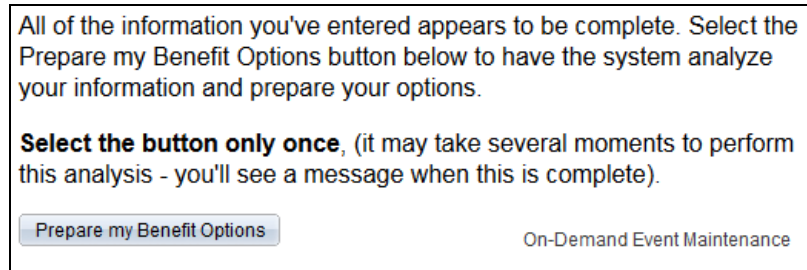
Back Next

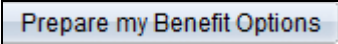
Step	Action
41.	Use the Voluntary Deductions page to review, add, or update your voluntary deductions.

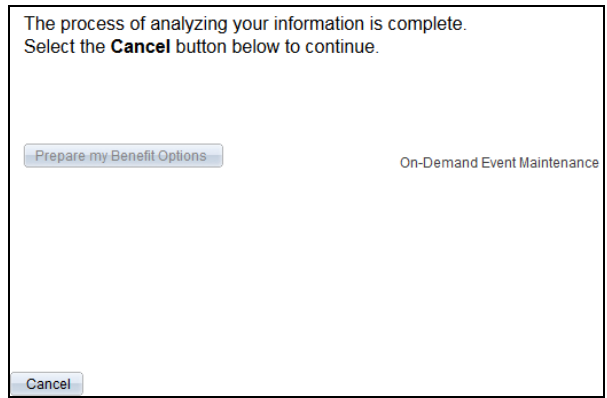
42.	Click the Next button. 
-----	--

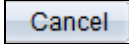


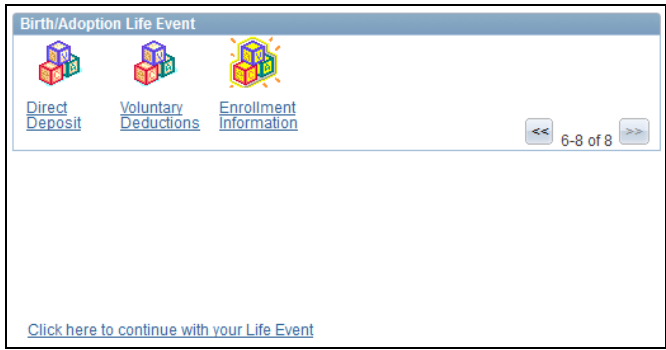
Step	Action
43.	Upon creating and completing the steps of the Birth/Adoption Life event, your benefit options are ready to be prepared. You can either have your benefits prepared now or you can return to this step later.
44.	Click the Yes, I'd like to prepare my benefit options now link. 



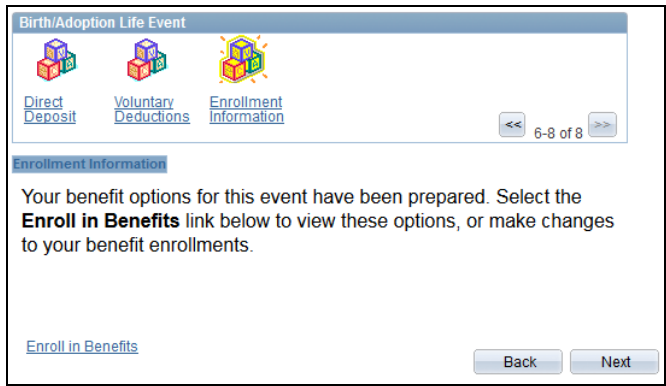
Step	Action
45.	Click the Prepare my Benefit Options button. 





Step	Action
46.	Click the Cancel button. 



Step	Action
47.	Click the Click here to continue with your Life Event link. Click here to continue with your Life Event




Step	Action
48.	Click the Enroll in Benefits link. 

Benefits Enrollment 

Daisy Plant


After your initial enrollment, the only time you may change your benefit choices is during open enrollment or a qualified family status change.
The Information icon provides you with additional information about your enrollment.
The Select button next to an event means it is currently open for enrollment.
Use the Select button to begin your enrollment.


Note: Some events may be temporarily closed until you have completed enrollment for a prior event.

Open Benefit Events					
Event Description		Event Date	Event Status	Job Title	
Birth or Adoption		09/01/2014	Open	Patient Financial Rep 2	<input type="button" value="Select"/>

After you use the Select button, it will take a few seconds for your benefits enrollment information to load.


[Return to Life Events - Birth/Adoption](#)

Step	Action
49.	Based on your life event and the information you entered, your benefits are open for enrollment.
50.	Click the Select button. 

Benefits Enrollment 

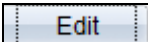
Birth or Adoption

Daisy Plant

 Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Enrollment Summary			
Medical	Before Tax	After Tax	<input type="button" value="Edit"/>
Current: United Open Access Plan:Empl Only			
New: United Open Access Plan:Empl Only	83.13		
Dental	Before Tax	After Tax	<input type="button" value="Edit"/>
Current: Waive			
New: Waive			
Vision	Before Tax	After Tax	<input type="button" value="Edit"/>

Step	Action
51.	Use the Enrollment Summary table to view your current coverage and elect new coverage. To elect benefits, click the Edit button to the right of the appropriate benefit. In this example, you will elect coverage for several benefits. In this example, you will edit your medical elections. Be sure you make all necessary edits before submitting.

Step	Action
52.	Click the Edit button to the right of Medical. 

Benefits Enrollment

Medical

Daisy Plant

All of our medical choices promote wellness as part of their benefits and are available to protect you and your dependents if you become sick or injured.

i Important! Your current coverage is: **United Open Access Plan with Employee Only coverage.** You will continue with this coverage if you do not make a choice.

Select an Option

Here Are Your Available Options With Your per-pay-period Costs:
(Your cost = Full benefit cost - Credits)

[Overview of all Plans](#)

Select one of the following plans:

United Open Access Plan

Coverage Level	Your Costs	Tax Class
Employee Only	\$83.13	Before-Tax
Employee + Spouse	\$173.80	Before-Tax
Employee + Child(ren) + GC	\$150.40	Before-Tax
Family	\$241.07	Before-Tax

Step	Action
53.	For each benefit you wish to enroll in, there is a note reminding you of your current coverage. Until you submit your enrollment information, your coverage will not change.
54.	Scroll down the page.

Enroll Your Dependents

The following list displays all individuals who are eligible to be your dependents. If an individual is missing from this list, use the Add/Review Dependents button to determine why they are not eligible. You may also use this button to add new dependents to your list.

You may enroll any of the following individuals for coverage under this plan by checking the **Enroll** box next to the dependent's name.

Dependent Beneficiary		
Enroll	Name	Relationship
<input type="checkbox"/>	Suzie Plant	Child

Step	Action
55.	Next, enroll those individuals you would like covered under the selected medical plan.

Step	Action
56.	Click the Enroll radio button to the left of the appropriate dependent to enroll them for medical coverage under the selected plan. <input type="checkbox"/>
57.	Click the Update Elections button. <input type="button" value="Update Elections"/>

Benefits Enrollment

Medical

Daisy Plant

i Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Your Choice

You have chosen United Open Access Plan with Employee + Child(ren) + GC coverage. You are also covering Employee + Child(ren) + GC.

Your Estimated per-pay-period Cost

Your Cost: \$150.40

Your Covered Dependents

Primary Care Provider Details	
Name	Relationship
Suzie Plant	Child

Notes

Once submitted, this choice will take effect on 09/01/2014. Deductions and/or Credits for this choice will start with the pay period beginning 08/24/2014.

Step	Action
58.	Review your selection, including the cost and covered dependents. Click Discard Changes to return and change your choices. Click Update Elections to save your choices.
59.	Click the Update Elections button. <input type="button" value="Update Elections"/>

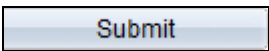
This table summarizes estimated costs for your new benefit choices.


Election Summary			
Summarized estimates for new Benefit Elections	Total	Before Tax	After Tax
Costs	150.40	150.40	0.00
Your Costs	150.40	150.40	0.00

These costs do not include certain choices that are based on variable earnings.

Select the **Submit** button to send your final choices to the Benefits Department.

i Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Step	Action
60.	Before submitting, be sure to review the Election Summary table. This table contains the summarized estimated costs for your new elections.
61.	Click the Submit button. 

Benefits Enrollment 

Submit Benefit Choices

Daisy Plant

You have almost completed your enrollment. If you have no further changes, select the **Submit** button at the bottom of this page to finalize your benefit choices.

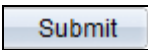
Select the **Cancel** button if you are not ready to submit your choices and wish to return to the Enrollment Summary.

Do not submit your benefit choices until you have completed your enrollment. You may store your choices on each page and return to the Enrollment Summary as many times as you'd like up until your enrollment deadline. However, once you select the Submit button your benefit choices will be sent to the Benefits Department for processing.

Once your enrollment is processed, you may not be able to make any further benefit changes until the next Open Enrollment period or if you have a qualified family status change.

Authorize Elections

By submitting your benefit choices you are authorizing the company to take deductions from your paycheck to pay for your benefit costs. You are also authorizing the Benefits Department to send necessary personal information to your selected providers to initiate and support your coverage.

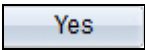
Step	Action
62.	Before submitting your benefit choices, please read the information on this page.
63.	Click the Submit button to send your final choices to the Benefits Department. 

Message

Please certify dependents' use of tobacco products. (21004,7)

You are certifying that your responses in regards to the use of tobacco products by all of your dependents are truthful. In order to be eligible for the Non-Smoker rates, neither you nor any of your dependents over the age of 18 can use tobacco products.

I understand the requirements for my dependents regarding their use of tobacco products. You cannot submit until you have agreed.

Step	Action
64.	Click the Yes button. 

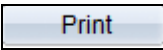
Benefits Enrollment

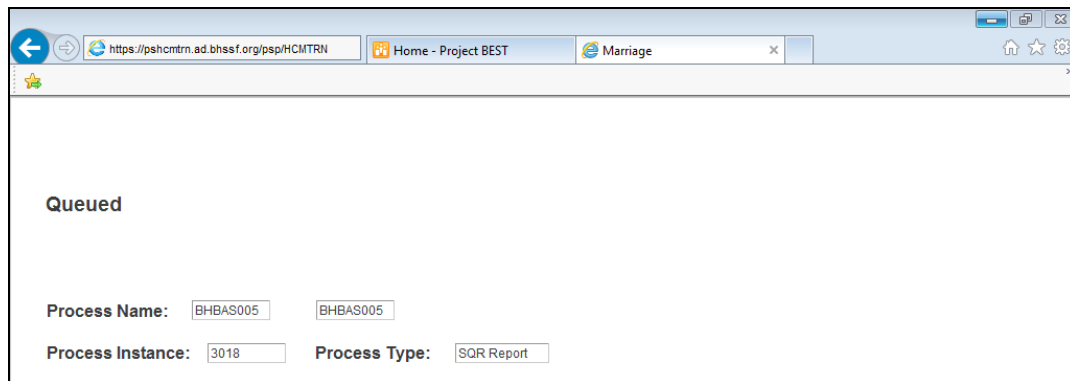
Submit Confirmation

Daisy Plant

Your benefit choices have been successfully submitted to the Benefits Department. You will receive a confirmation statement within one week to confirm your new hire enrollment. To return to the Benefits Enrollment page, use the OK button.

OK Print


Step	Action
65.	Click the Print button. 

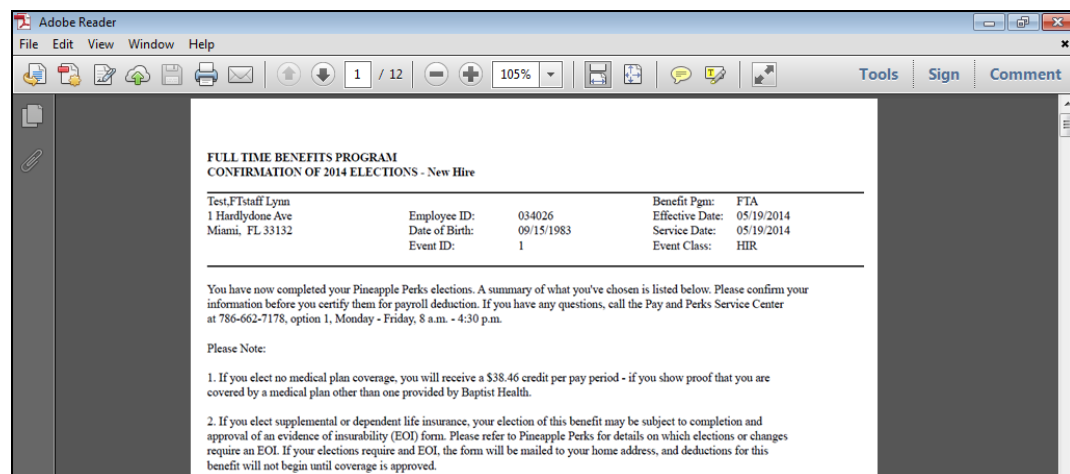


Queued

Process Name: BHBAS005 BHBAS005

Process Instance: 3018 Process Type: SQR Report

Step	Action
66.	A new window opens confirming that the process for printing your confirmation statement has been queued. Next, you will close the window and navigate to your confirmation page.
67.	Click the Close button. 



Adobe Reader

File Edit View Window Help

1 / 12 105%

Tools Sign Comment



**FULL TIME BENEFITS PROGRAM
CONFIRMATION OF 2014 ELECTIONS - New Hire**

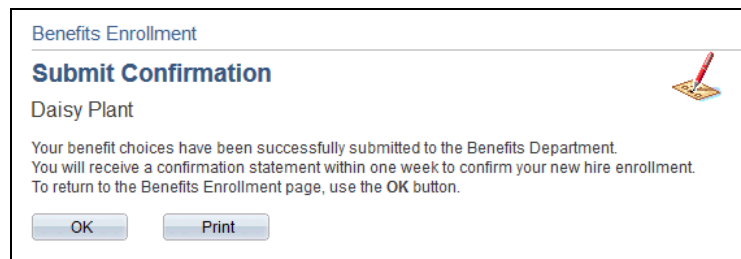
Test, FTstaff Lynn 1 Hardlydyone Ave Miami, FL 33132	Employee ID: 034026 Date of Birth: 09/15/1983 Event ID: 1	Benefit Pgm: FTA Effective Date: 05/19/2014 Service Date: 05/19/2014 Event Class: HIR
--	---	--

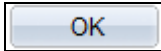
You have now completed your Pineapple Perks elections. A summary of what you've chosen is listed below. Please confirm your information before you certify them for payroll deduction. If you have any questions, call the Pay and Perks Service Center at 786-662-7178, option 1, Monday - Friday, 8 a.m. - 4:30 p.m.

Please Note:

- If you elect no medical plan coverage, you will receive a \$38.46 credit per pay period - if you show proof that you are covered by a medical plan other than one provided by Baptist Health.
- If you elect supplemental or dependent life insurance, your election of this benefit may be subject to completion and approval of an evidence of insurability (EOI) form. Please refer to Pineapple Perks for details on which elections or changes require an EOI. If your elections require an EOI, the form will be mailed to your home address, and deductions for this benefit will not begin until coverage is approved.

Step	Action
68.	The system opens a PDF of the confirmation statement. There are several pages including: confirmation of elections, selected benefit plan and option, coverage category, base amounts and pay period deductions. You can also review dependents and beneficiaries for each benefit plan.
69.	Click the Print button. 
70.	Once you have reviewed and printed your confirmation statement, click the Close button. 



Step	Action
71.	Click the OK button. 
72.	Please note that you must provide the Benefits Department a copy of the Foot Print Certificate provided to you by the hospital to complete the enrollment of your dependent. In addition, a birth certificate and Social Security number is required to avoid your carrier dropping your dependent.
73.	Congratulations. You have successfully elected benefits as a result of the birth of a child/adoption of a child. End of Procedure.

Updating Dependent Information

Navigation: Main Menu > HCM > Self Service > Benefits > Dependent/Beneficiary Info

Purpose: Use this transaction to practice updating a dependent's personal information.

Dependent and Beneficiary Information

Joshua Lyman

The people listed below may be eligible for Benefit Coverage. Select a name to view or modify their personal information.

Dependent Information						
Name	Relationship to Employee	Date of Birth	Marital Status	Marital Status Date	Student	Disabled
Sam Lyman	Child	11/28/1988	Unknown	01/01/2013	No	<input type="checkbox"/>
Toby Lyman	Child	09/29/2004	Single		No	<input type="checkbox"/>
Abby Lyman	Child	09/07/2014	Single		No	<input type="checkbox"/>

In addition to the persons listed above, the following can also be allocated to as beneficiaries.

No Beneficiaries on Record

[Dependent/Beneficiary Coverage Summary](#)

Step	Action
1.	Use the Dependent and Beneficiary Information page to view those eligible for benefit coverage. Click a name to view or modify his or her personal information.
2.	Click the appropriate Dependent Name link.

Dependent/Beneficiary Personal Information

Joshua Lyman

Dependent/Beneficiary's personal information as of Oct 8, 2014. Use the Edit button at the bottom of this page to update this information.

Personal Information

First Name: Sam

Middle Name:

Last Name: Lyman

Name Prefix:

Name Suffix:

Date of Birth: 11/28/1988

Gender: Male

SSN: XXX-XX-XXXX (Social Security Number)

Relationship to Employee: Child

Step	Action
3.	Use the Dependent/Beneficiary Personal Information page to view and edit a dependent's personal information. Click the Edit button at the bottom of the page to edit the selected dependent's personal information.
4.	Scroll down the page.

Status Information

Marital Status: Unknown
Student: No
Disabled: No
Smoker: Non Smoker

Address and Telephone

Same Address as Employee

Country: United States
Address: 1041 DELTA AVE
WAYWARD PINES, FL 330299
BROWARD



Same Phone as Employee

Phone: 954/392-1159 Home

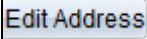
[Return to Dependent/Beneficiary Summary](#)

Step	Action
5.	In this example, you will update a dependent's marital status, address, and phone number. Click the Edit button. <input type="button" value="Edit"/>

Personal Information	
*First Name:	Sam
Middle Name:	
*Last Name:	Lyman
Name Prefix:	
Name Suffix:	
Date of Birth:	11/28/1988
*Gender:	Male
SSN:	XXX-XX-XXXX (Social Security Number)
*Relationship to Employee:	Child
Status Information	
*Marital Status:	Unknown
Student:	No
Disabled:	No
Smoker:	Non Smoker
Address and Telephone	
<input checked="" type="checkbox"/> Same Address as Employee	
Country:	United States
Address:	1041 DELTA AVE WAYWARD PINES, FL 33029 BROWARD

Step	Action
6.	Click the button to the right of the Marital Status field. 
7.	Click the appropriate Marital Status list item.
8.	Deselect the Same Address as Employee option. 

Status Information			
*Marital Status:	Single	As of:	10/08/2014
Student:	No		
Disabled:	No		
Smoker:	Non Smoker		
Address and Telephone			
<input type="checkbox"/> Same Address as Employee			
Country:	United States	Change Country	
Address:		Edit Address	

Step	Action
9.	Click the Edit Address button. 


Edit Address

Country: United States [Change Country](#)

Address 1:

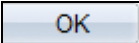
Address 2:

Address 3:

City: State: 

Postal:

County:

Step	Action
10.	Enter the desired information into the Address 1 field.
11.	Enter the desired information into the City field.
12.	Enter the desired information into the State field.
13.	Enter the desired information into the Postal field.
14.	Click the OK button. 

Address and Telephone

Same Address as Employee

Country: United States [Change Country](#)


Address: 27 Bernard Ave [Edit Address](#)
Delaware, OH 43015

Same Phone as Employee

Phone: 954/392-1159 Home

[Return to Dependent/Beneficiary Summary](#)

* Required Field

Step	Action
15.	Deselect the Same Phone as Employee option. 

Address and Telephone

Same Address as Employee

Country: United States [Change Country](#)

Address: 27 Bernard Ave
Delaware, OH 43015

Same Phone as Employee

Phone:

[Return to Dependent/Beneficiary Summary](#)

* Required Field

Step	Action
16.	Enter the desired information into the Phone field.
17.	Click the Save button. <input type="button" value="Save"/>

Message

Please certify this dependent's use of tobacco products. (21004.4)

You are certifying that your response in regards to the use of tobacco products by this dependent is truthful. In order to be eligible for the Non-Smoker rates, neither you nor any of your dependents over the age of 18 can use tobacco products.

I understand the requirements for my dependent regarding their use of tobacco products. You cannot Save this dependent's information until you select 'Yes'.

Step	Action
18.	Click the Yes button. <input type="button" value="Yes"/>

Personal Information

Save Confirmation

The Save was successful.

Step	Action
19.	Click the OK button. <input type="button" value="OK"/>

Address and Telephone

Same Address as Employee

Country: United States
 Address: 27 Bernard Ave
 Delaware, OH 43015

Same Phone as Employee

Phone: 513/767-5895

[Return to Dependent/Beneficiary Summary](#)

Step	Action
20.	Click the Return to Dependent/Beneficiary Summary link. Return to Dependent/Beneficiary Summary
21.	Congratulations. You have updated a dependent's personal information. End of Procedure.

Updating Beneficiary Information

Navigation: Main Menu > HCM > Self Service > Benefits > Dependent/Beneficiary Info

Purpose: Use this transaction to practice updating beneficiary information.

Dependent and Beneficiary Information

Claudia Cregg

The people listed below may be eligible for Benefit Coverage. Select a name to view or modify their personal information.

Dependent Information						
Name	Relationship to Employee	Date of Birth	Marital Status	Marital Status Date	Student	Disabled
Charles Cregg	Child	01/01/1988	Single		No	<input type="checkbox"/>
Jacob Cregg	Child	09/26/2002	Single		No	<input type="checkbox"/>
Donna Cregg	Child	09/28/2014	Single		No	<input type="checkbox"/>

In addition to the persons listed above, the following can also be allocated to as beneficiaries.

Beneficiary Information		
Name	Relationship to Employee	Date of Birth
Tim McGarry	Sibling	01/01/1968 <input type="checkbox"/>

[Dependent/Beneficiary Coverage Summary](#)

Step	Action
1.	Use the Dependent and Beneficiary Information page to view those eligible for benefit coverage. Click a name to view or modify their personal information.
2.	Click the appropriate Beneficiary Name link.

Dependent/Beneficiary Personal Information

Claudia Cregg

Dependent/Beneficiary's personal information as of Oct 8, 2014. Use the Edit button at the bottom of this page to update this information.

Personal Information	
First Name:	Tim
Middle Name:	
Last Name:	McGarry
Name Prefix:	
Name Suffix:	
Date of Birth:	01/01/1968
Gender:	Male
SSN:	111-33-2222 (Social Security Number)
Relationship to Employee:	Sibling

Step	Action
3.	Use the Dependent/Beneficiary Personal Information page to view and edit a beneficiary's personal information. Click the Edit button at the bottom of the page to edit the selected beneficiary's personal information.
4.	Scroll down the page.

Address and Telephone

Same Address as Employee

Country: United States
Address: 4115 Forest Ave
#2
Miami, FL 33125

Same Phone as Employee

Phone:

[Return to Dependent/Beneficiary Summary](#)

Step	Action
5.	In this example, you will update the beneficiary's address and phone number. Click the Edit button. <input type="button" value="Edit"/>

Address and Telephone

Same Address as Employee

Country: United States
Address: 4115 Forest Ave
#2
Miami, FL 33125

Same Phone as Employee

Phone:

[Return to Dependent/Beneficiary Summary](#)

* Required Field

Step	Action
6.	Deselect the Same Address as Employee option. <input type="checkbox"/>

Address and Telephone

Same Address as Employee

Country: United States [Change Country](#)

Address:

Same Phone as Employee

Phone:

[Return to Dependent/Beneficiary Summary](#)

* Required Field

Step	Action
7.	Click the Edit Address button. <input type="button" value="Edit Address"/>


Edit Address

Country: United States

Address 1:

Address 2:

Address 3:

City: State: 

Postal:

County:

Step	Action
8.	Enter the desired information into the Address 1 field.
9.	Enter the desired information into the City field.
10.	Enter the desired information into the State field.
11.	Enter the desired information into the Postal field.
12.	Click the OK button. <input type="button" value="OK"/>

Address and Telephone

Same Address as Employee

Country: United States [Change Country](#)

Address: 811 Covefield Blvd Erlanger, KY 45108

Same Phone as Employee

Phone:

[Return to Dependent/Beneficiary Summary](#)

* Required Field

Step	Action
13.	Enter the desired information into the Phone field.
14.	Click the Save button. <input type="button" value="Save"/>

Personal Information

Save Confirmation

The Save was successful.

Step	Action
15.	Click the OK button. <input type="button" value="OK"/>

Address and Telephone

Same Address as Employee

Country: United States
 Address: 811 Covefield Blvd
 Erlanger, KY 45108

Same Phone as Employee

Phone: 859/776-0000

[Return to Dependent/Beneficiary Summary](#)

Step	Action
16.	Click the Return to Dependent/Beneficiary Summary link. Return to Dependent/Beneficiary Summary
17.	Congratulations. You have updated a beneficiary's personal information. End of Procedure.

Managing Payroll Information

Viewing Compensation Information

Procedure

Navigation: Main Menu > HCM > Self Service > Payroll and Compensation > Compensation History

Purpose: Use this transaction to practice viewing your compensation information.

Compensation History

Joshua Lyman

From: 05/28/2014 [View Another Date Range](#)

To: 10/09/2014

Employee Job Information

Employee ID: 033888
 Department: eICU
 Job Title: Registered Nurse
 Payroll Status: Active

Salary History

Date of Change	Action	Reason	Annual Salary	Compensation per Frequency
05/28/2014	Hire	New Position	50,000.000 USD	25,000000 USD Hourly

Variable Cash Compensation

Award Date	Type	Award Value

Step	Action
1.	Use the Compensation History page to view your salary change history and variable compensation.
2.	Click the appropriate Date of Change in the Salary History section to view the details of a salary change.

Compensation History

Salary Change Details

Joshua Lyman

Date of Change: 05/28/2014

Salary Change Summary

	Annual	Monthly
Current Salary:	50,000.000 USD	4,166.667 USD
Change:	0.000 USD	0.000 USD
Change Percent:	0.000	0.000
New Salary:	50,000.000 USD	4,166.667 USD

Job Information

Salary Plan: Nurse Salary Ranges
 Grade: Nursing N11
 Step: 0

Salary Components

Component	New Amount	Change Amount	Change Percent
Default NA Hourly	25,000000 USD	0.000000 USD	0.000

[Return to Compensation History](#)

Step	Action
3.	Use the Salary Changes Details page to view your current and new salary, and to view the difference in dollar amount and percent of change. In this example, there is no change as this is a new hire.
4.	Click the Return to Compensation History link. Return to Compensation History

Compensation History

Joshua Lyman

From: 05/28/2014 [View Another Date Range](#)
 To: 10/09/2014

Employee Job Information

Employee ID: 033888
 Department: eICU
 Job Title: Registered Nurse
 Payroll Status: Active

Salary History

Date of Change	Action	Reason	Annual Salary	Compensation per Frequency	
05/28/2014	Hire	New Position	50,000.000 USD	25.000000 USD	Hourly

Variable Cash Compensation

Award Date	Type	Award Value

Step	Action
5.	You can also view your variable compensation details on this page. In this example, this employee does not have variable compensation options.
6.	Congratulations. You have viewed your compensation information. End of Procedure.

Updating Compensation Information - Tax Data

Navigation: Main Menu > HCM > Self Service > Payroll and Compensation > W-4 Tax Information

Purpose: Use this transaction to practice updating your compensation information. In this example, you will update your tax data information.

W-4 Tax Information

Joshua Lyman Social Security Number: 100-60-2000
 South Miami Hospital

You must complete Form W-4 so the Payroll Department can calculate the correct amount of tax to withhold from your pay. Federal income tax is withheld from your wages based on marital status and the number of allowances claimed on this form. You may also specify that an additional dollar amount be withheld. You can file a new Form W-4 anytime your tax situation changes and you choose to have more, or less, tax withheld.

Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.

Home Address

716 NW 67 STREET
 WAYWARD PINES, FL 33029

W-4 Tax Data

Enter total number of Allowances you are claiming:

Enter Additional Amount, if any, you want withheld from each paycheck:

Indicate Marital Status: Single Married

Check here and select Single status if married but withholding at single rate.
Note: If married, but legally separated, or spouse is a nonresident alien, select 'Single' status.

Check here if your last name differs from that shown on your social security card.
You must call 1-800-772-1213 for a new card.

Step	Action
1.	Use the W-4 Tax Information page to review and update your W-4 tax data. This page is used to determine the correct amount of tax to withhold from your pay.
2.	Federal income tax is withheld from your wages based on marital status and the number of allowances claimed on this form. You can also ask to withhold an additional dollar amount. Note, the information entered on this form is subject to review by the IRS.
3.	Scroll down the page.


W-4 Tax Data

Enter total number of Allowances you are claiming:

Enter Additional Amount, if any, you want withheld from each paycheck:

Indicate Marital Status: Single Married

Check here and select Single status if married but withholding at single rate.
Note: If married, but legally separated, or spouse is a nonresident alien, select 'Single' status.

Check here if your last name differs from that shown on your social security card.
You must call 1-800-772-1213  for a new card.


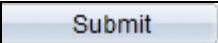
Claim Exemption


I claim exemption from withholding for the year and I certify that I meet BOTH of the following conditions for exemption:

1. Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability.
2. This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.

Check this box if you meet both conditions to claim exempt status.

Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

Step	Action
4.	You can also claim exemption if you meet both conditions outlined here. In this example, this employee meets the conditions for exemption.
5.	Click the Check this box if you meet both conditions to claim exempt status. option. 
6.	Click the Submit button. 

 Help

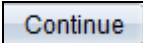
Verify Identity

To protect your privacy, verify your identity by typing your password. If you are not this user, click **Sign Out**.

User ID: JOSHLYM

Password:


Step	Action
7.	To protect your information, the system requires you to enter your password in order to submit changes.

Step	Action
8.	Enter the desired information into the Password field.
9.	Click the Continue button. 

Submit Confirmation

The Submit was successful.

However, due to timing, your change may not be reflected on the next paycheck.

Step	Action
10.	Note that depending on when this information is updated, your change may not be reflected on your next paycheck. Click the OK button. 

Claim Exemption

I claim exemption from withholding for the year and I certify that I meet **BOTH** of the following conditions for exemption:

1. Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability.
2. This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.

Check this box if you meet both conditions to claim exempt status.

Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

Step	Action
11.	Notice, you can no longer update the Claim Exemption section.
12.	Congratulations. You have updated your tax data information. End of Procedure.

Entering Compensation Information - Direct Deposit

Navigation: Main Menu > HCM > Self Service > Payroll and Compensation > Direct Deposit

Purpose: Use this transaction to practice entering compensation information. In this example, you will enter bank information so you may receive your pay through direct deposit.

Direct Deposit

Add Direct Deposit

Sam Seaborn

Your Bank Information

Routing Number: [View check example](#)

Distribution Instructions

Account Number:

*Account Type:

*Deposit Type:

Amount or Percent:

*Deposit Order: (Example: 1 = First Account Processed)

* Required Field

[Return to Direct Deposit](#)

Step	Action
1.	Use the Add Direct Deposit page to enter account information for where you would like your pay deposited.
2.	Note, you may need to refer to your personal checkbook in order to enter your routing and account information. For help entering this information, click the View check example link.
3.	Click the View check example link. View check example

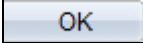
Check Example

9999

⑈ 999999999 ⑈ 999 999 999 ⑈ 9999

1 2

1 - Routing Number
2 - Account Number

Step	Action
4.	Use this page example to find the appropriate numbers on your check. The number on the bottom left of the check is your routing number. The number on the bottom middle of the check is your account number.
5.	Click the OK button. 

Direct Deposit
Add Direct Deposit
Sam Seaborn

Your Bank Information

Routing Number: [View check example](#)

Distribution Instructions

Account Number:

*Account Type:



*Deposit Type:


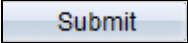
Amount or Percent:

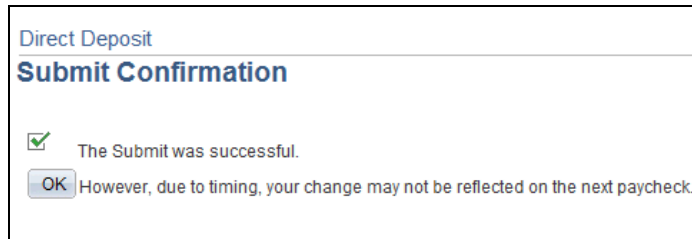
*Deposit Order: (Example: 1 = First Account Processed)


* Required Field

[Return to Direct Deposit](#)

Step	Action
6.	Enter the desired information into the Routing Number field.
7.	Enter the desired information into the Account Number field.
8.	Click the button to the right of the Account Type field. 
9.	Click the appropriate Account Type list item.
10.	Click the button to the right of the Deposit Type field. 
Step	Action
11.	<p>There are three deposit types: amount, balance, and percent. Select Balance to have the balance of your pay deposited to this account.</p> <p>However, you may enter additional direct deposit accounts so that you may, for example, have 80% deposited into one account and 20% into another. Select Percent to enter a percent of your pay to be deposited to this account.</p> <p>Or, for example, you may want a flat \$100 deposited into this account every paycheck and the remaining balance in another account. Select Amount to enter a specific dollar amount to be deposited to this account.</p>

Step	Action
12.	Whichever deposit type you choose, ensure that all of your pay will be deposited into an account. Any unspecified funds will be disbursed in a paper check.
13.	In this example, click the Balance list item. 
14.	Select the order in which your checks are deposited into your account(s). If you are only using one account, enter 1. If you have multiple accounts, you need to decide which accounts will be processed first. This is really important if you are using amount as your deposit type for one account and balance for another. If you selected your balance account to process first and your amount account to process second, all of your pay will be deposited to the first account and nothing will be deposited to the second account.
15.	Enter the desired information into the Deposit Order: Required field.
16.	Click the Submit button. 



Step	Action
17.	Note, depending on when you entered your account information and depending on the bank, direct deposit changes may not be available for your next paycheck. Click the OK button. 

Direct Deposit
Sam Seaborn

Review, add or update your direct deposit information.

Direct Deposit Detail						
Account Type	Routing Number	Account Number	Deposit Type	Amount or Deposit Percent	Order	
Checking	999999999	1234567890	Balance		1	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

[Pay Statement Print Option](#)

Step	Action
18.	Once you have saved your bank information, you are routed back to the Direct Deposit page. Use this page to edit an existing account, delete an account, or add an account.
19.	Congratulations. You have entered your direct deposit information. End of Procedure.

Updating Compensation Information - Direct Deposit

Navigation: Main Menu > HCM > Self Service > Payroll and Compensation > Direct Deposit

Purpose: Use this transaction to practice updating compensation information. In this example, you will update direct deposit information.

Direct Deposit
Sam Seaborn

Review, add or update your direct deposit information.

Direct Deposit Detail						
Account Type	Routing Number	Account Number	Deposit Type	Amount or Deposit Percent	Order	
Checking	999999999	1234567890	Percent	80.00%	1	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Checking	999999999	0987654321	Percent	20.00%	1	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

[Pay Statement Print Option](#)

Step	Action
1.	<p>Use the Direct Deposit page to review, add, or update your direct deposit information.</p> <p>In this example, you are deleting an account and changing the deposit type on the remaining account.</p>
2.	<p>Click the Delete button to the right of the appropriate account.</p> <p><input type="button" value="Delete"/></p>

Direct Deposit

Delete Confirmation

?

Are you sure you want to delete this Deposit Account: 0987654321?

Step	Action
3.	<p>Click the Yes - Delete button.</p> <p><input type="button" value="Yes - Delete"/></p>

Direct Deposit
Sam Seaborn

Review, add or update your direct deposit information.

Direct Deposit Detail						
Account Type	Routing Number	Account Number	Deposit Type	Amount or Deposit Percent	Order	
Checking	999999999	1234567890	Percent	80.00%	1	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

[Pay Statement Print Option](#)

Step	Action
4.	<p>Now that you have deleted an account, you need to either add another account or change the remaining account.</p> <p>Employees need to ensure all their pay is set for direct deposit. In this example, because the remaining account is set to deposit 80%, the remaining 20% of this person's pay is not set for direct deposit.</p>
5.	<p>In this example, you will edit the deposit type on the remaining account.</p> <p>Click the Edit button.</p> <p><input type="button" value="Edit"/></p>

Direct Deposit

Change Direct Deposit
Sam Seaborn

Your Bank Information

Routing Number: [View check example](#)

Distribution Instructions

Account Number:

*Account Type:

*Deposit Type:


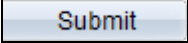
Amount or Percent:

*Deposit Order: (Example: 1 = First Account Processed)

* Required Field

[Return to Direct Deposit](#)

Step	Action
6.	<p>Click the button to the right of the Deposit Type field.</p> <p><input type="text" value="▼"/></p>


Step	Action
7.	Click the Balance list item. 
8.	Enter the desired information into the Deposit Order: Required field.
9.	Click the Submit button. 

Direct Deposit

Submit Confirmation

The Submit was successful.

However, due to timing, your change may not be reflected on the next paycheck.

Step	Action
10.	Note, depending on the timing and your bank(s), your next paycheck may still be deposited to two accounts. Click the OK button. 

Direct Deposit

Sam Seaborn

Review, add or update your direct deposit information.

Direct Deposit Detail					
Account Type	Routing Number	Account Number	Deposit Type	Amount or Deposit Percent	Order
Checking	999999999	1234567890	Balance		1

[Pay Statement Print Option](#)

Step	Action
11.	Once you have saved, you are returned to the Direct Deposit page. Notice the deposit type has been changed to Balance.
12.	Congratulations. You have updated your direct deposit information. End of Procedure.

Updating Compensation Information - Voluntary Deductions

Navigation: Main Menu > HCM > Self Service > Payroll and Compensation > Voluntary Deductions

Purpose: Use this transaction to practice entering voluntary deductions.

Voluntary Deductions
 Claudia Cregg
 Baptist Health South Florida

Review, add or update your voluntary deductions information.

Voluntary Deductions						
Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance

Step	Action
1.	Use the Voluntary Deductions page to review, add, or update your voluntary deduction information. In this example, you will add a deduction to help support United Way.
2.	Click the Add Deduction button. <div style="text-align: center;"><input type="button" value="Add Deduction"/></div>

Voluntary Deductions

Add Voluntary Deduction
 Claudia Cregg
 Baptist Health South Florida

*Type of Deduction:

*Select whether Deduction is a Flat Amount or Percent:

*Enter Amount or Percent to be deducted:

Take deduction until I reach this Goal Amount:


*Enter Deduction Start Date: (example: 12/31/2000)

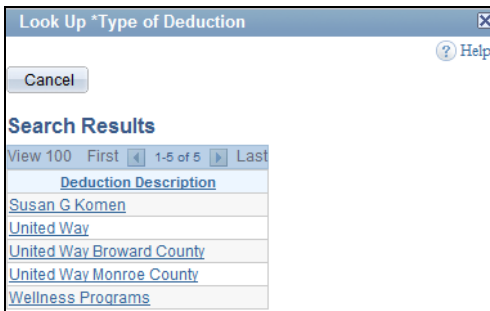
Enter Deduction Stop Date: (example: 12/31/2000)

Current Balance: 0.00

* Required Field

[Return to Voluntary Deductions](#)

Step	Action
3.	Click the Look up Type of Deduction (Alt+5) button. 



Look Up *Type of Deduction

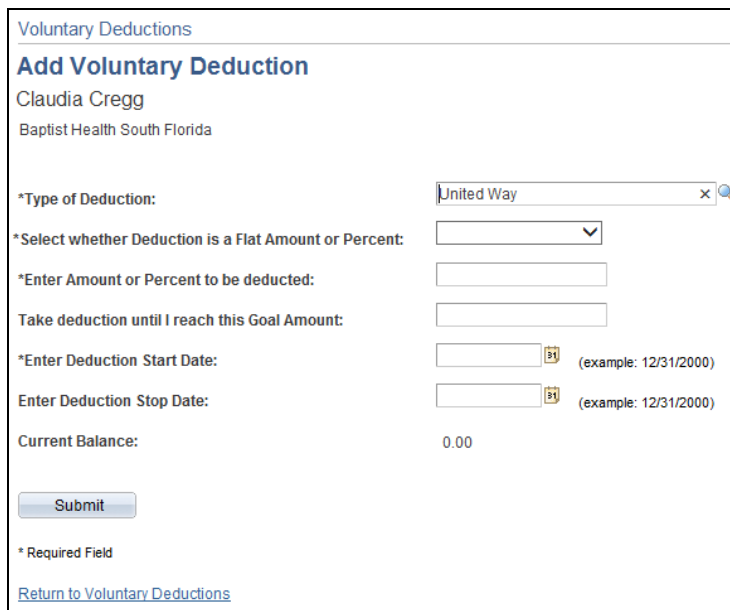
Cancel

Search Results

View 100 First 1-5 of 5 Last

Deduction Description
Susan G Komen
United Way
United Way Broward County
United Way Monroe County
Wellness Programs

Step	Action
4.	Click the appropriate Deduction Description link.



Voluntary Deductions

Add Voluntary Deduction

Claudia Cregg
Baptist Health South Florida

*Type of Deduction:

*Select whether Deduction is a Flat Amount or Percent:

*Enter Amount or Percent to be deducted:

Take deduction until I reach this Goal Amount:

*Enter Deduction Start Date: (example: 12/31/2000)


Enter Deduction Stop Date: (example: 12/31/2000)

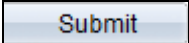
Current Balance: 0.00

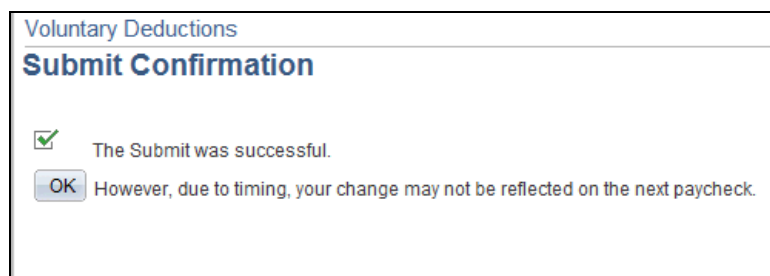
Submit


* Required Field

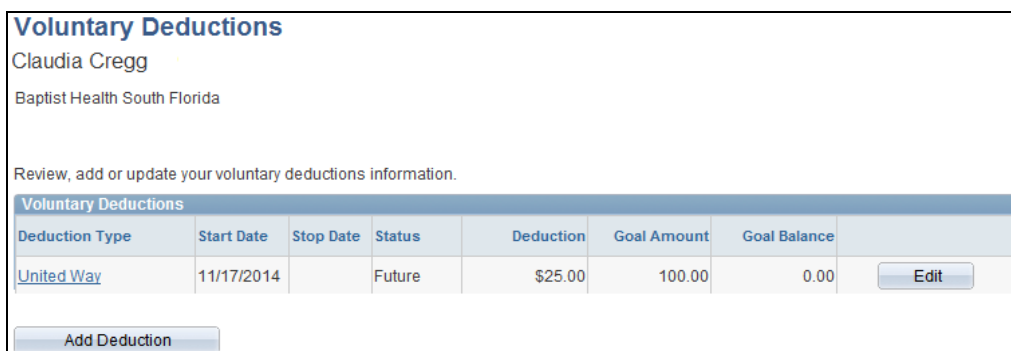
[Return to Voluntary Deductions](#)

Step	Action
5.	Click the button to the right of the Select whether Deduction is a Flat Amount or Percent field. 
6.	Click the appropriate Amount list item. You can select to have a percent of your total gross or a flat amount deducted. In this example, select Amount. <input type="text" value="Amount"/>

7.	Enter the desired information into the Enter Amount or Percent to be deducted field.
8.	You can select to have a one-time deduction, or you can select to have a larger amount deducted over several paychecks. In this example, you are donating \$25, but your goal amount is \$100. Enter your goal amount and \$25 will be deducted until you reach your goal.
9.	Enter the desired information into the Take deduction until I reach this Goal Amount field. For example, enter " 100.00 ".
10.	Enter the desired information into the Enter Deduction Start Date field.
11.	Click the Submit button. 



Step	Action
12.	Click the OK button. 

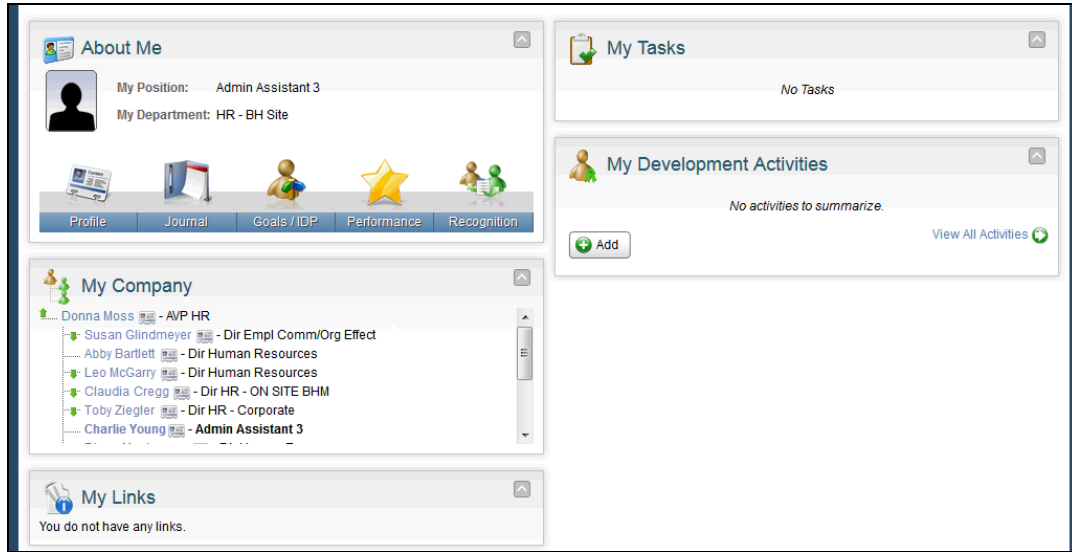


Step	Action
13.	Notice, the Voluntary Deductions page has been updated to reflect your deduction. You can return to this page to track the deduction status, goal balance, edit current deductions or add deductions in the future.
14.	Congratulations. You have entered a voluntary deduction. End of Procedure.

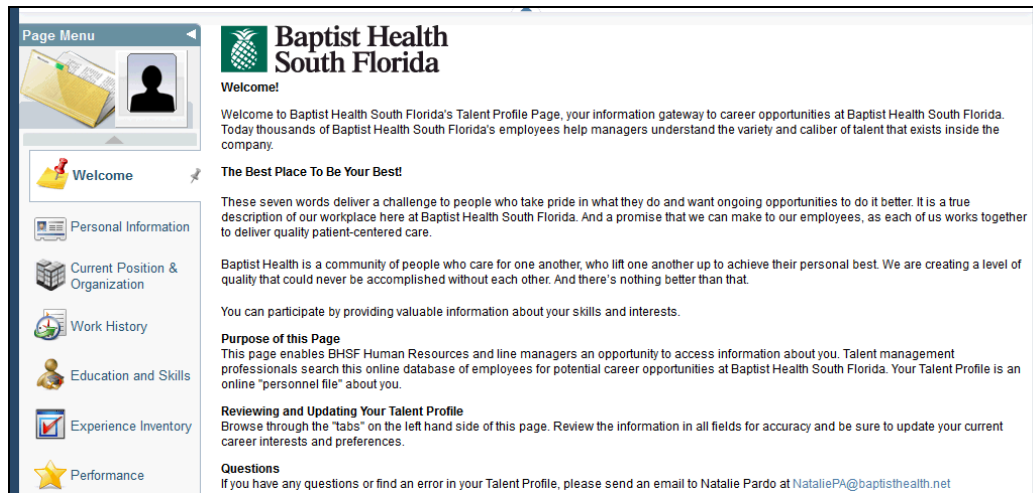
Managing Your Talent Profile

Reviewing Personal Information in Your Talent Profile

Purpose: Use this transaction to practice reviewing your personal information in your Talent Profile.







Step	Action
1.	Click the Profile tab.









Step	Action
2.	Click the Personal Information link. Personal Information

Welcome Logoff Help ?

    Find Employees:

Talent Profile

Page Menu

 
 Welcome
 **Personal Information**
 Current Position & Organization
 Work History

Personal

First Name: Charlie

Middle Name: Erik

Last Name: Young

Preferred Name:

Instant Messenger ID:

Employee ID: 10000

E-mail Addresses

Personal E-mail:

Business E-mail: charley@baptisthealth.net

Phone Numbers


Home Phone:

Mobile Phone:

Work Phone:

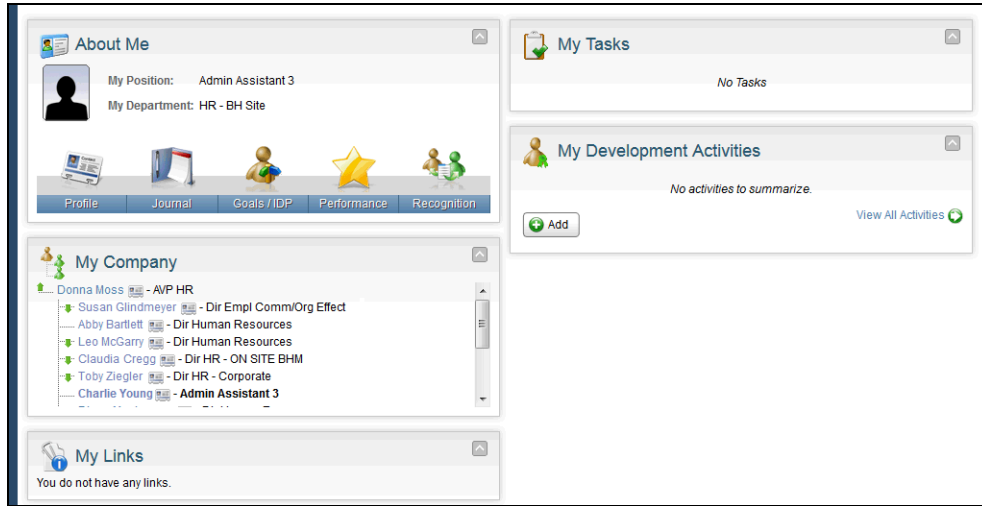
Fax:

Pager:

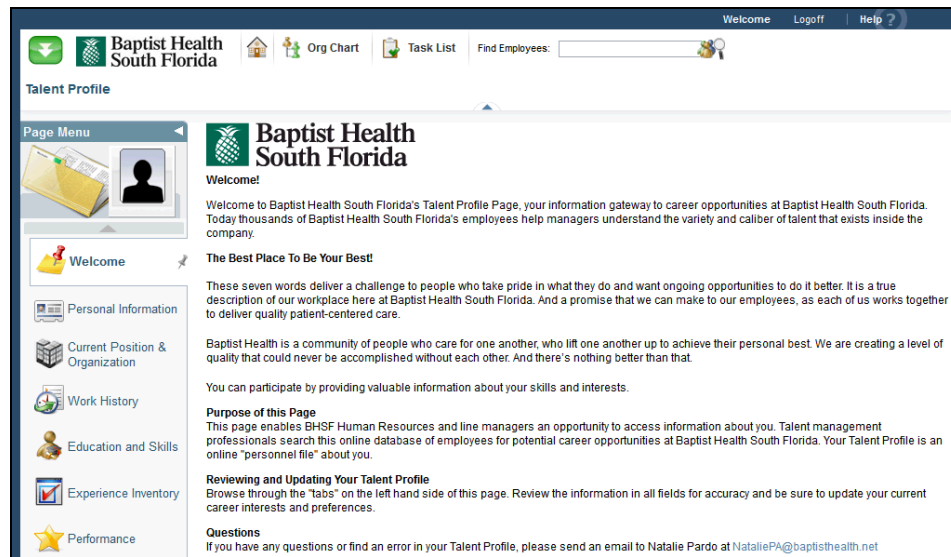
Step	Action
3.	<p>Use the Personal Information page to review your information, including name, employee ID, e-mail addresses, and phone numbers.</p> <p>Note, you can only view your personal information on this page. Any updates must be made through Employee Self Service. See the <i>Updating Personal Information</i> simulations for more information.</p>
4.	<p>Click the Home button.</p> 
5.	<p>Congratulations. You have reviewed your personal information. End of Procedure.</p>

Reviewing Current Position and Organization Information in Your Talent Profile

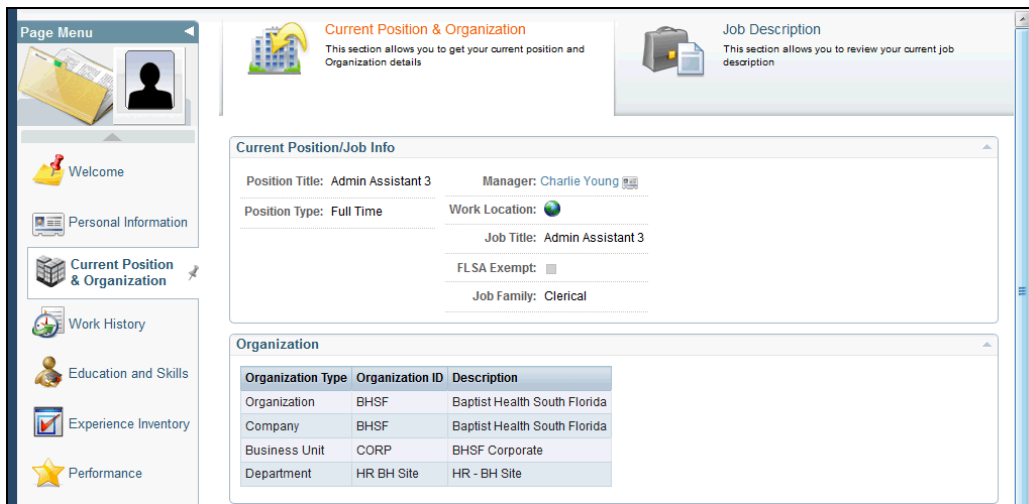
Purpose: Use this transaction to practice reviewing your current position and organizational information in your Talent Profile.



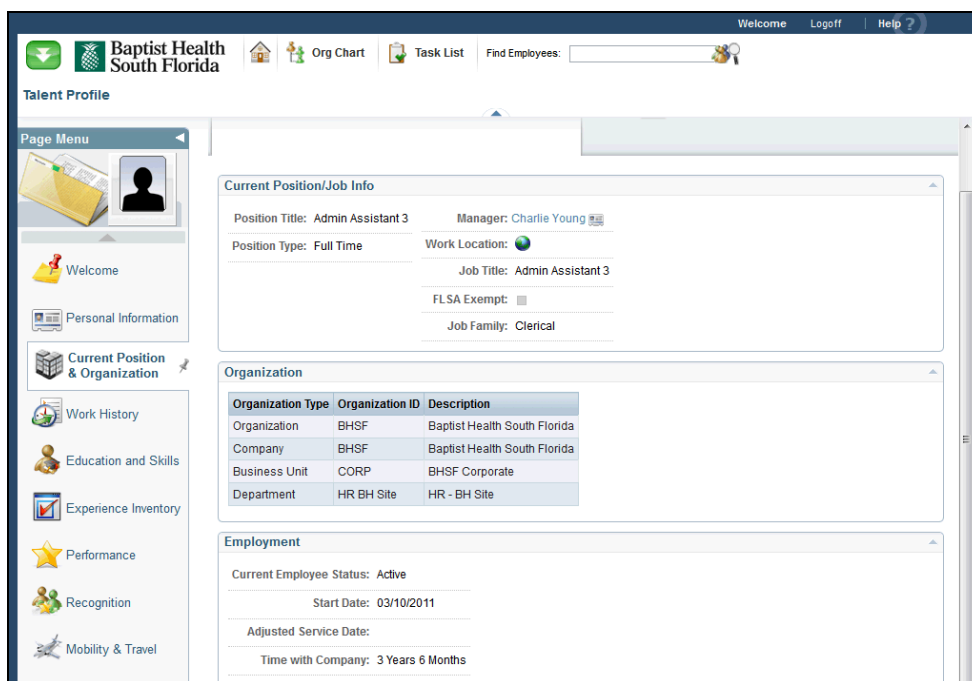
Step	Action
1.	Click the Profile tab.




Step	Action
2.	Click the Current Position & Organization link.



Step	Action
3.	On this page, you can review your current position/job, organization, and employment information.
4.	Scroll down the page.

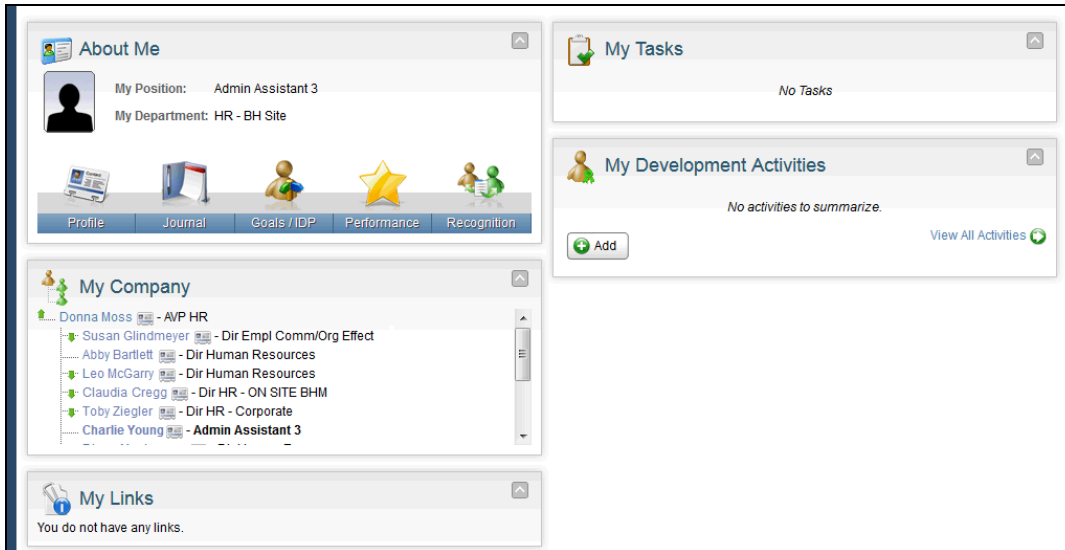


Step	Action
5.	Click the Home button. 

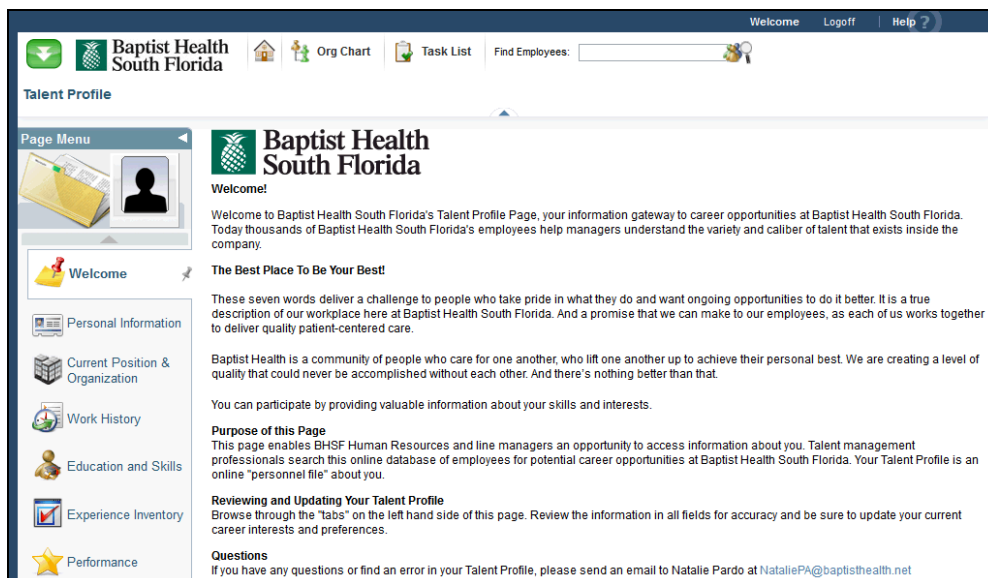
Step	Action
6.	Congratulations. You have reviewed your personal and organizational information. End of Procedure.

Reviewing Work History Information in Your Talent Profile

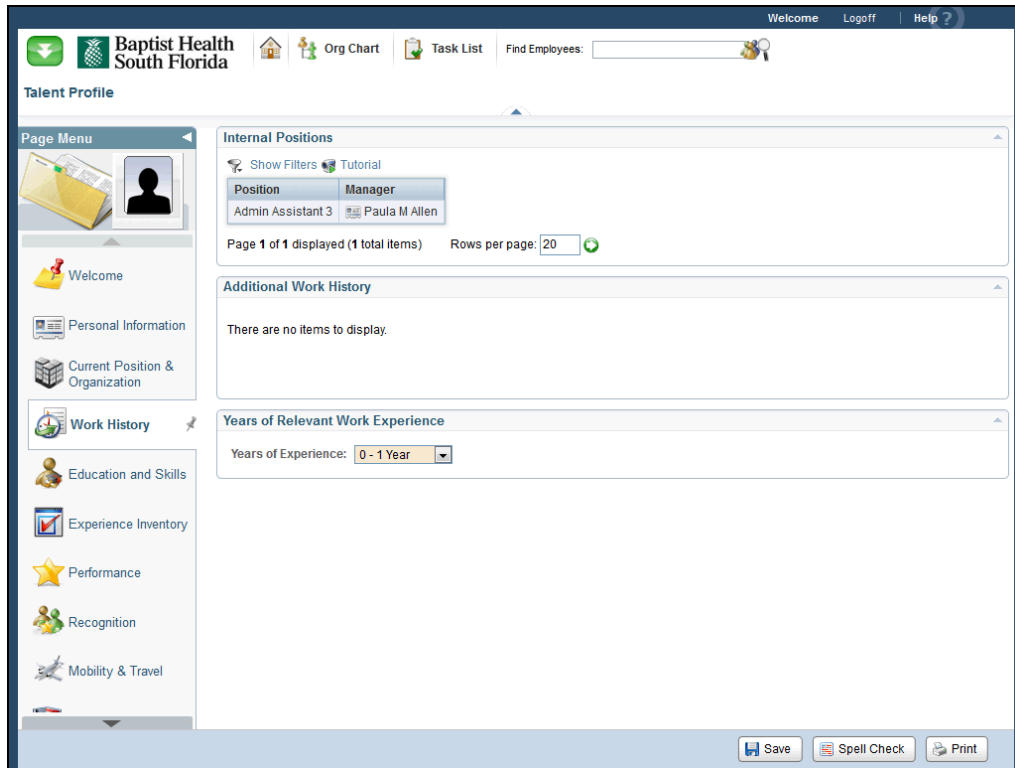
Purpose: Use this transaction to practice reviewing your work history information in your Talent Profile.






Step	Action
1.	Click the Profile tab.



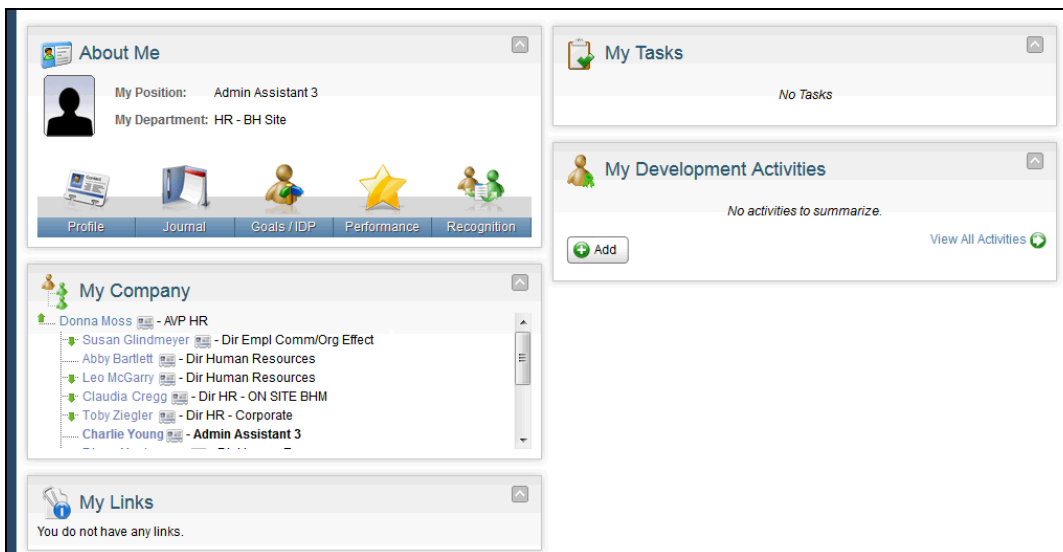
Step	Action
2.	Click the Work History link.



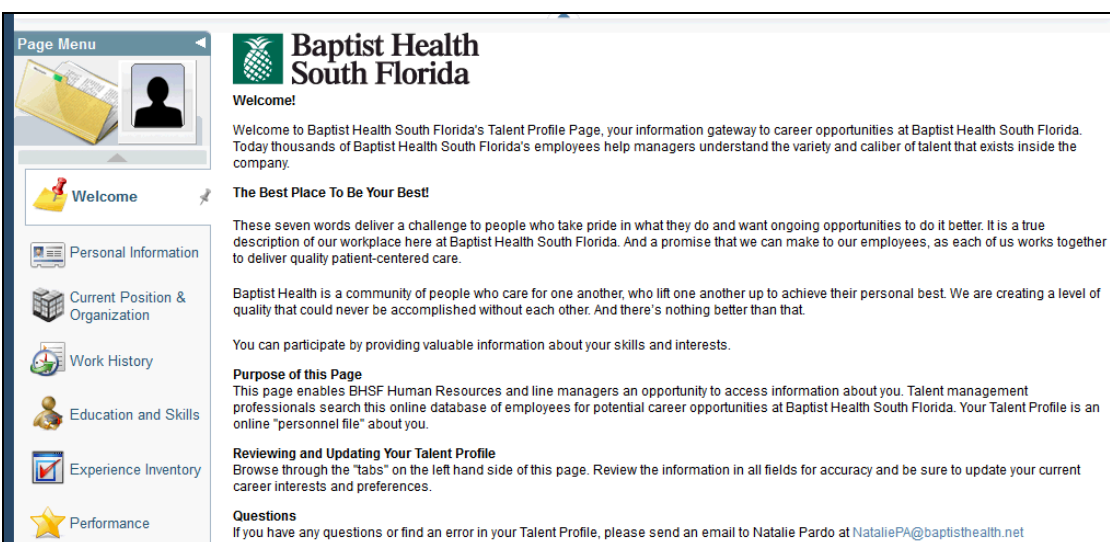
Step	Action
3.	Use this page to review your work history, internal positions information, and review and update your years of relevant work experience. In this example, you will update your years of relevant experience.
4.	Click the button to the right of the Years of Experience field. 
5.	Click the appropriate Years of Experience list item.
6.	Click the Save button. 
7.	Click the Home button. 
8.	Congratulations. You have reviewed and updated your work history information. End of Procedure.

Reviewing Education and Skills Information in Your Talent Profile

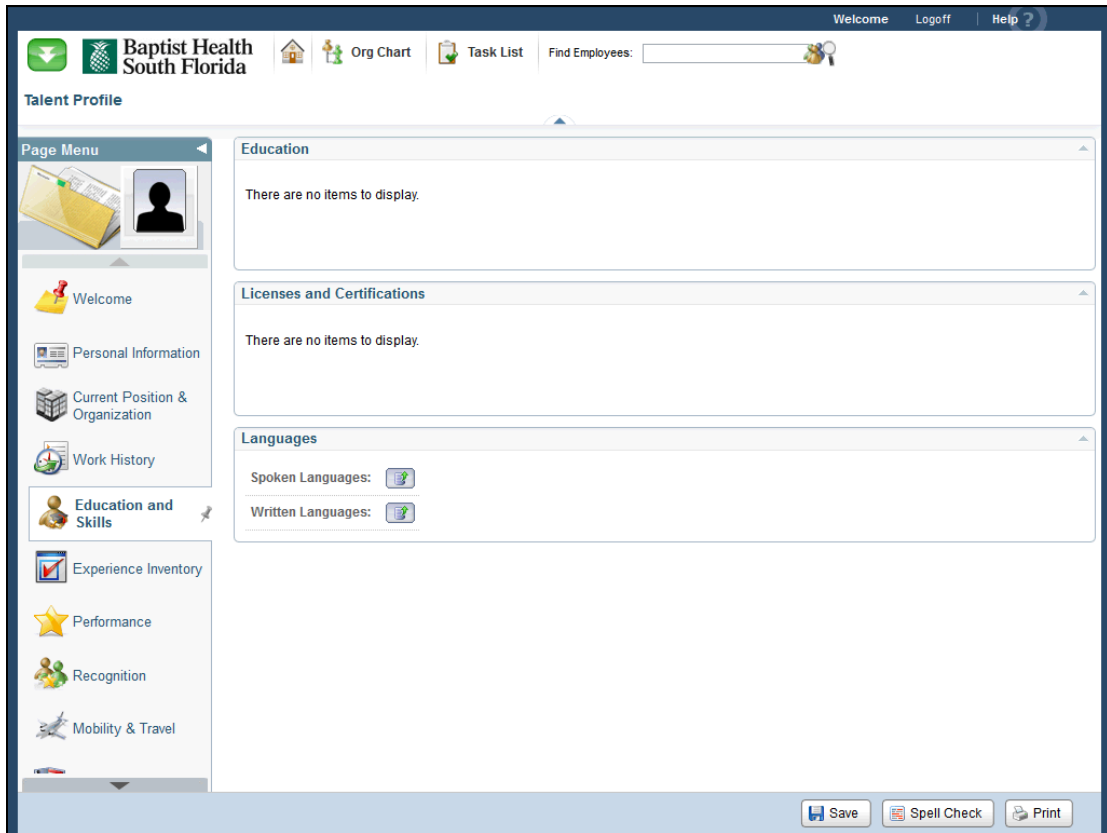
Purpose: Use this transaction to practice reviewing your education and skills information in your Talent Profile.




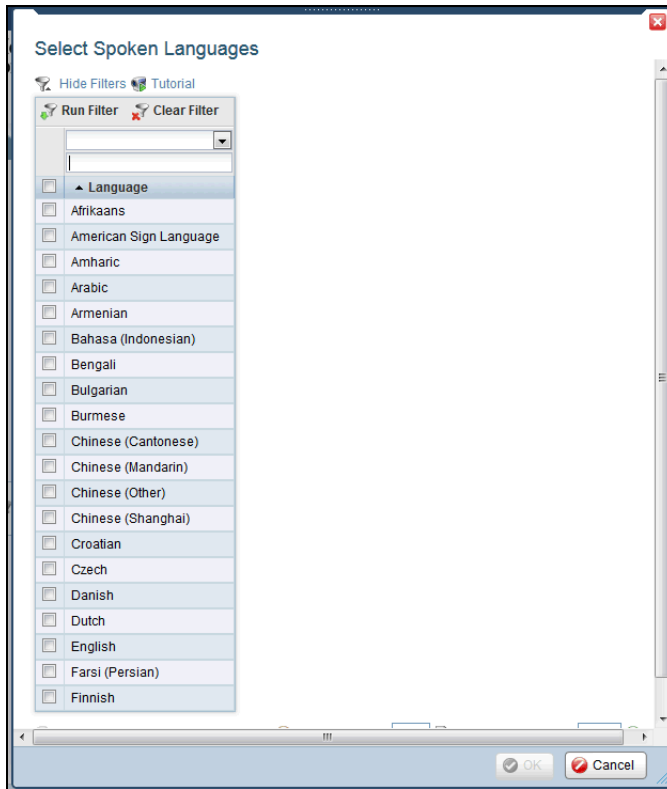
Step	Action
1.	Click the Profile tab.



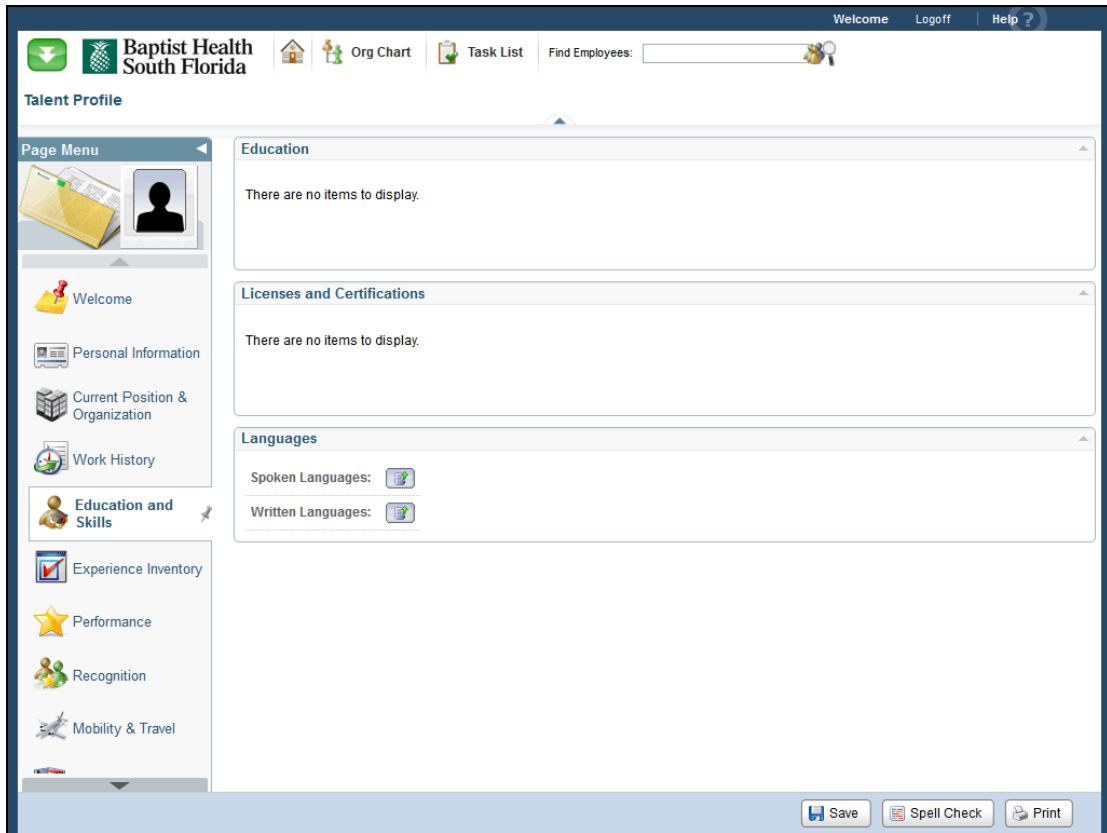
Step	Action
2.	Click the Education and Skills link.




Step	Action
3.	<p>Use the Education and Skills page to review your education and skills history, including: education completed, licenses and certifications obtained, and languages both written and spoken.</p> <p>To update your education and skills, refer to the simulation Updating Personal Profile Information – Licenses, Certifications, and Experience.</p>
4.	<p>Click the Select button to view available spoken languages.</p> 



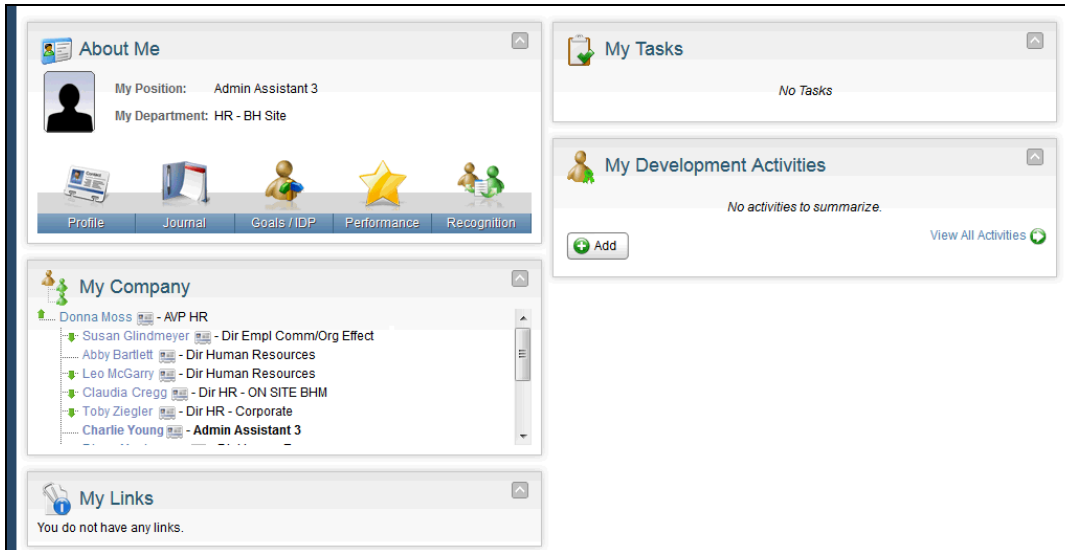
Step	Action
5.	Use this page to search and select a language. In this example, you are not selecting a language. Click the Cancel button.



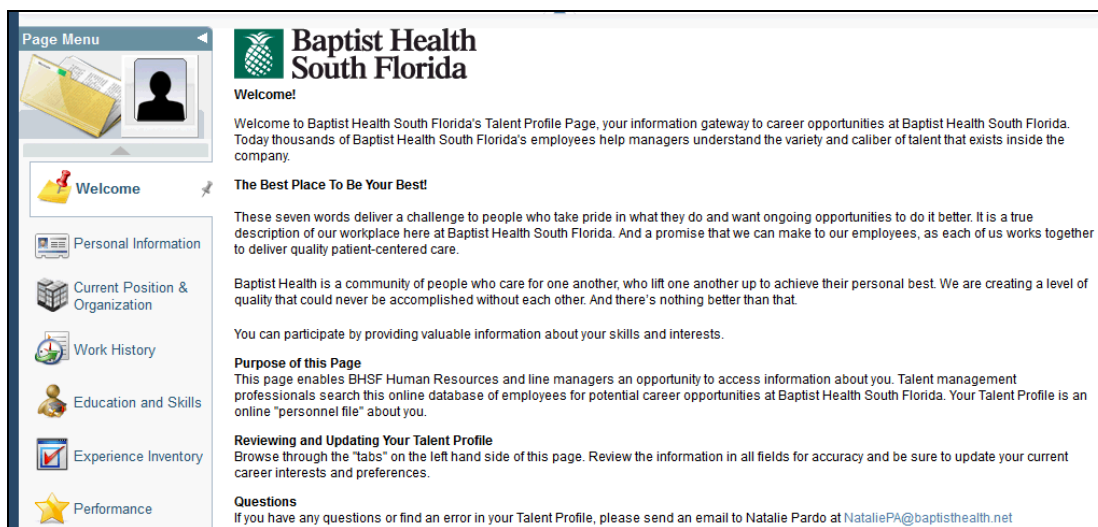
Step	Action
6.	Click the Home button. 
7.	Congratulations. You have reviewed your education and skills information. End of Procedure.

Updating Experience Inventory Information in Your Talent Profile

Purpose: Use this transaction to practice updating your experience inventory information in your Talent Profile.



Step	Action
1.	Click the Profile tab.



Step	Action
2.	Click the Experience Inventory link.

Skill & Experience Inventory

Administration

Communication

Education

Environmental Services


Finance

Human Resources

Information Technology

Medical

Save Spell Check Print

Step	Action
3.	Use this page to update your experience inventory. To add an experience or skill, click the check box to the left of the appropriate category that best describes the area of your experience or skill.
4.	Click the Administration option to expand available experiences and skills associated with the Administration category. 

Skill & Experience Inventory

Administration

Administration Admitting Business Support

Capacity Management Cash Handling Coding

Community Relations Construction Management Contracts Management

Customer Service Dietary/Nutrition Fitness

Fundraising Hospitality and Business Relations Informatics

Information Technology Insurance International

Legal Logistics Magnet

Mail Services Marketing Nursing Administration

Nursing Informatics Patient Transportation Performance Improvement

Physician Relations Plant Operations Printing

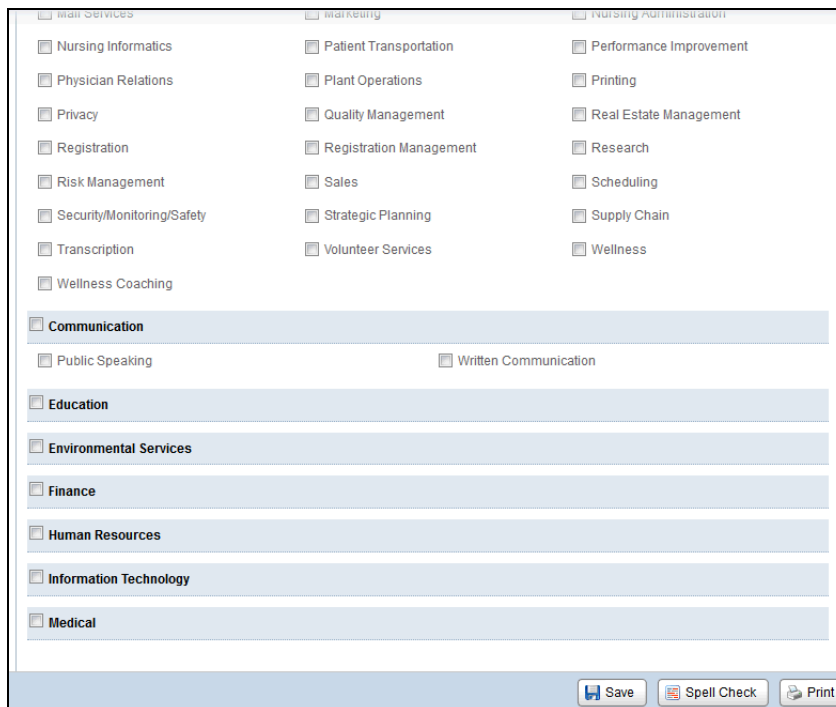
Privacy Quality Management Real Estate Management


Registration Registration Management Research

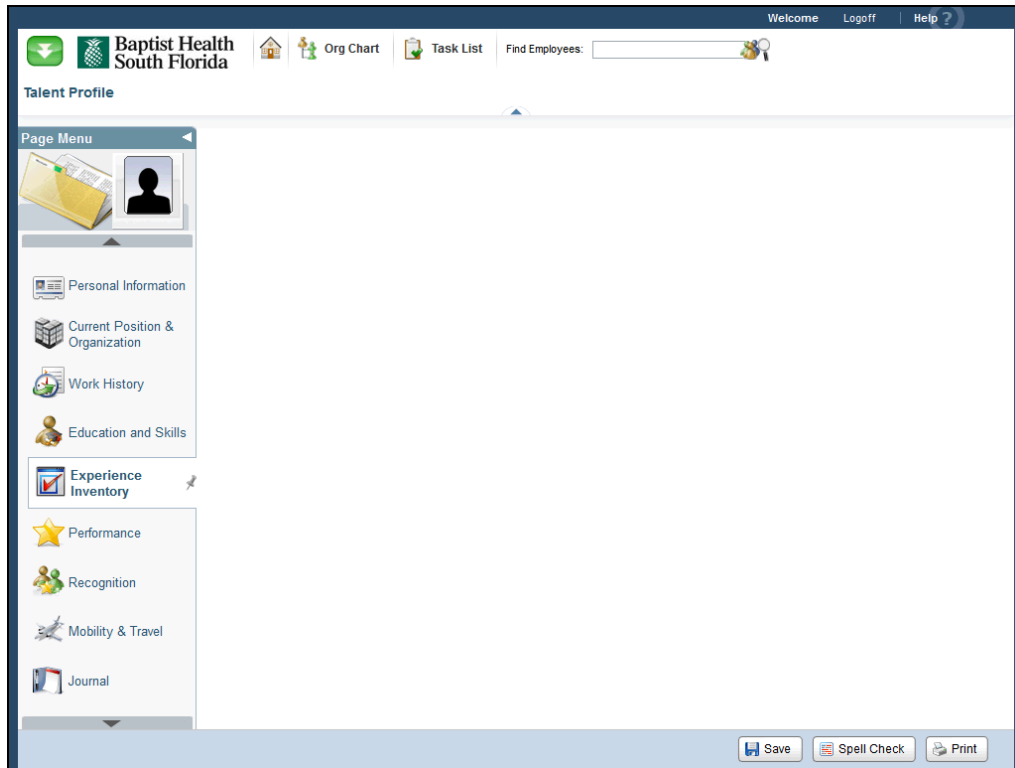
Risk Management Sales Scheduling


Save Spell Check Print

Step	Action
5.	Click the Administration option to add it to your experience inventory. <input type="checkbox"/>
6.	Scroll down the page.



Step	Action
7.	Click the Communication option to expand available experiences and skills associated with the Communication category. <input type="checkbox"/>
8.	Click the Written Communication option to add it to your experience inventory. <input type="checkbox"/>
9.	Click the Save button. 



Step	Action
10.	Click the Home button. 
11.	Congratulations. You have updated your experience inventory information. End of Procedure.

Reviewing Performance Information in Your Talent Profile

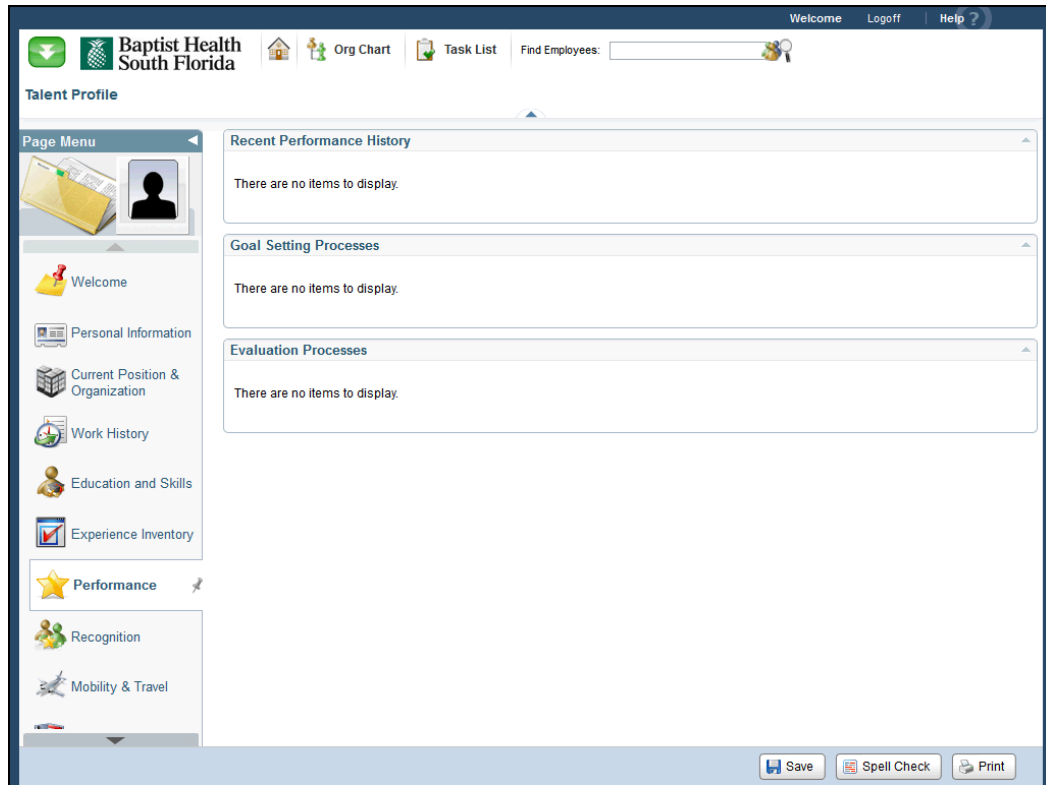
Purpose: Use this transaction to practice reviewing your performance information in your Talent Profile.


The screenshot shows a user's Talent Profile page. The 'About Me' section displays the user's position as 'Admin Assistant 3' and their department as 'HR - BH Site'. Below this are five tabs: Profile, Journal, Goals / IDP, Performance, and Recognition. The 'My Tasks' section shows 'No Tasks'. The 'My Development Activities' section shows 'No activities to summarize' and includes an 'Add' button and a 'View All Activities' link. The 'My Company' section lists several employees, including Donna Moss (AVP HR), Susan Glindmeyer (Dir Empl Comm/Org Effect), Abby Bartlett (Dir Human Resources), Leo McGarry (Dir Human Resources), Claudia Cregg (Dir HR - ON SITE BHM), Toby Ziegler (Dir HR - Corporate), and Charlie Young (Admin Assistant 3). The 'My Links' section shows 'You do not have any links.'

Step	Action
1.	Click the Profile tab.

The screenshot shows the Baptist Health South Florida Talent Profile page. The 'Page Menu' on the left includes links for Welcome, Personal Information, Current Position & Organization, Work History, Education and Skills, Experience Inventory, and Performance. The main content area features the Baptist Health South Florida logo and a 'Welcome!' message. It includes a section titled 'The Best Place To Be Your Best!' with a description of the workplace. Below this is a 'Purpose of this Page' section explaining that the page enables BHSF Human Resources and line managers to access information about the user. A 'Reviewing and Updating Your Talent Profile' section advises users to review and update their information. A 'Questions' section provides contact information for Natalie Pardo at nataliepa@baptisthealth.net.

Step	Action
2.	Click the Performance link.



Step	Action
3.	<p>Use this page to review your performance information. You can review recent performance history, goal setting processes, and evaluation processes.</p> <p>In this example, this employee is a new hire and therefore no performance information is available.</p>
4.	<p>Click the Home button.</p> 
5.	<p>Congratulations. You have reviewed your performance information. End of Procedure.</p>

Updating Mobility and Travel Preferences in Your Talent Profile

Purpose: Use this transaction to practice updating your mobility and travel preferences in your Talent Profile.

Step	Action
1.	Click the Profile tab.

Step	Action
2.	Click the Mobility & Travel link.

Relocation Preferences

Are you willing to relocate for a new position:





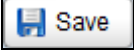
How soon will you be willing to relocate:

Relocation Alternatives:


Other Comments:





Travel Preferences

Are you willing to accept a position with increased travel:

Step	Action
3.	Use this page to review and update your mobility and travel preferences, including relocation availability and location preferences.
4.	Click the button to the right of the Are you willing to relocate for a new position field. 
5.	Click an entry in the list.
6.	Click the button to the right of the How soon will you be willing to relocate field. 
7.	Click the appropriate Relocation Timeframe .
8.	Click the button to the right of the Relocation Alternatives field. 
9.	Click the appropriate Relocation Alternative list item.
10.	Use the Other Comments field to provide additional information, such as a second relocation alternative.
11.	Click the button to the right of the Are you willing to accept a position with increased travel field. 
12.	Click the appropriate Response list item.
13.	Click the Save button. 



Welcome






 Org Chart
  Task List
 Find Employees:
 


Talent Profile

Page Menu

 Current Position & Organization

 Work History

 Education and Skills

Relocation Preferences

Are you willing to relocate for a new position:


How soon will you be willing to relocate:

Relocation Alternatives:

Other Comments:

Travel Preferences

Are you willing to accept a position with increased travel:

Step	Action
14.	Click the Home button. 
15.	Congratulations. You have updated your mobility and travel preferences. End of Procedure.

Updating Development Activities in Your Talent Profile

Purpose: Use this transaction to practice updating your development activities in your Talent Profile.

The screenshot shows a user's Talent Profile interface. It includes several sections:


- About Me:** Displays 'My Position: Admin Assistant 3' and 'My Department: HR - BH Site'. Below are tabs for Profile, Journal, Goals / IDP, Performance, and Recognition.
- My Tasks:** Shows 'No Tasks'.
- My Development Activities:** Shows 'No activities to summarize.' with an 'Add' button and a 'View All Activities' link.
- My Company:** Lists organizational members such as Donna Moss (AVP HR), Susan Glindmeyer (Dir Empl Comm/Org Effect), Abby Bartlett (Dir Human Resources), Leo McGarry (Dir Human Resources), Claudia Cregg (Dir HR - ON SITE BHM), Toby Ziegler (Dir HR - Corporate), and Charlie Young (Admin Assistant 3).
- My Links:** States 'You do not have any links.'

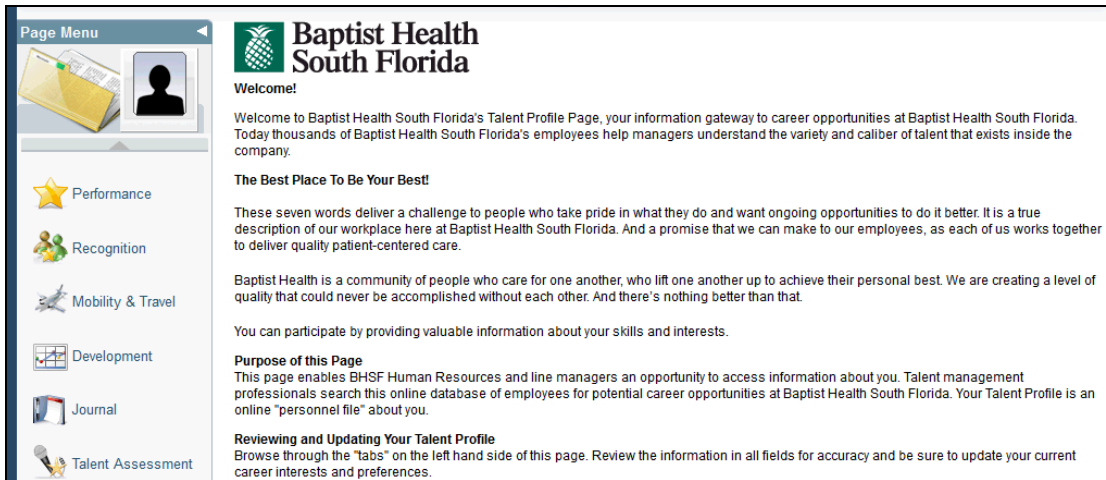
Step	Action
1.	Click the Profile tab.

This screenshot shows the Baptist Health South Florida Talent Profile page. It features a 'Page Menu' on the left with options like Personal Information, Current Position & Organization, Compensation, Work History, Education and Skills, Experience Inventory, Resume & Attachments, and Performance. The main content area includes:

- Welcome!** A message from Baptist Health South Florida.
- The Best Place To Be Your Best!** A motivational message about workplace quality.
- Purpose of this Page** Explains that the page allows HR and managers to access employee information for career opportunities.
- Reviewing and Updating Your Talent Profile** Instructs users to review and update their profile information.
- Questions** Provides contact information for Natalie Pardo at NataliePA@baptisthealth.net.

 At the bottom, there are utility buttons for Save, Spell Check, Print, and Statements.

Step	Action
2.	Click the Down Arrow button. 



Baptist Health South Florida

Welcome!

Welcome to Baptist Health South Florida's Talent Profile Page, your information gateway to career opportunities at Baptist Health South Florida. Today thousands of Baptist Health South Florida's employees help managers understand the variety and caliber of talent that exists inside the company.

The Best Place To Be Your Best!

These seven words deliver a challenge to people who take pride in what they do and want ongoing opportunities to do it better. It is a true description of our workplace here at Baptist Health South Florida. And a promise that we can make to our employees, as each of us works together to deliver quality patient-centered care.

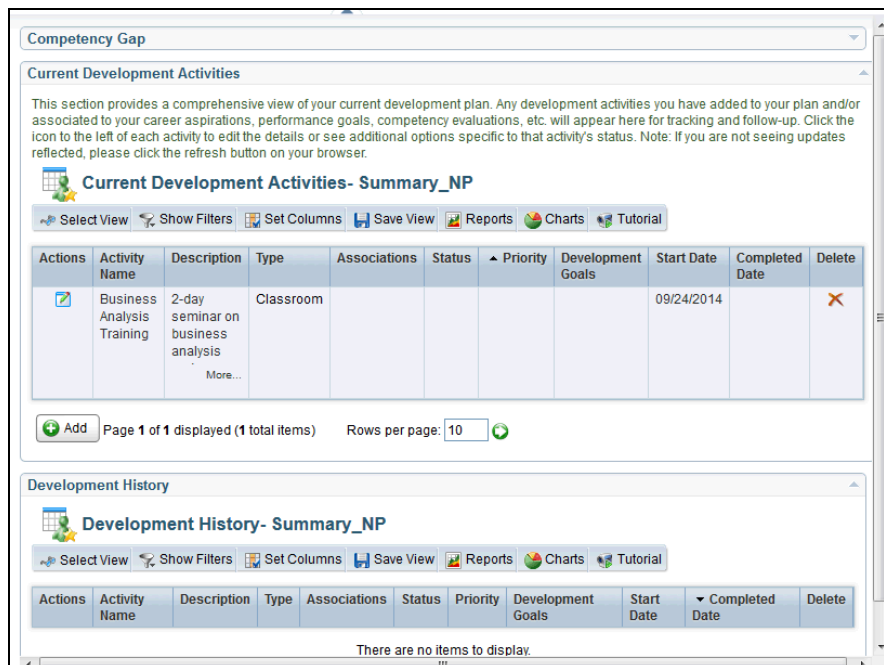
Baptist Health is a community of people who care for one another, who lift one another up to achieve their personal best. We are creating a level of quality that could never be accomplished without each other. And there's nothing better than that.

You can participate by providing valuable information about your skills and interests.

Purpose of this Page
This page enables BHSF Human Resources and line managers an opportunity to access information about you. Talent management professionals search this online database of employees for potential career opportunities at Baptist Health South Florida. Your Talent Profile is an online "personnel file" about you.

Reviewing and Updating Your Talent Profile
Browse through the "tabs" on the left hand side of this page. Review the information in all fields for accuracy and be sure to update your current career interests and preferences.

Step	Action
3.	Click the Development link.



Competency Gap

Current Development Activities

This section provides a comprehensive view of your current development plan. Any development activities you have added to your plan and/or associated to your career aspirations, performance goals, competency evaluations, etc. will appear here for tracking and follow-up. Click the icon to the left of each activity to edit the details or see additional options specific to that activity's status. Note: If you are not seeing updates reflected, please click the refresh button on your browser.

Current Development Activities- Summary_NP

Select View Show Filters Set Columns Save View Reports Charts Tutorial

Actions	Activity Name	Description	Type	Associations	Status	Priority	Development Goals	Start Date	Completed Date	Delete
	Business Analysis Training	2-day seminar on business analysis More...	Classroom					09/24/2014		


Add Page 1 of 1 displayed (1 total items) Rows per page: 10

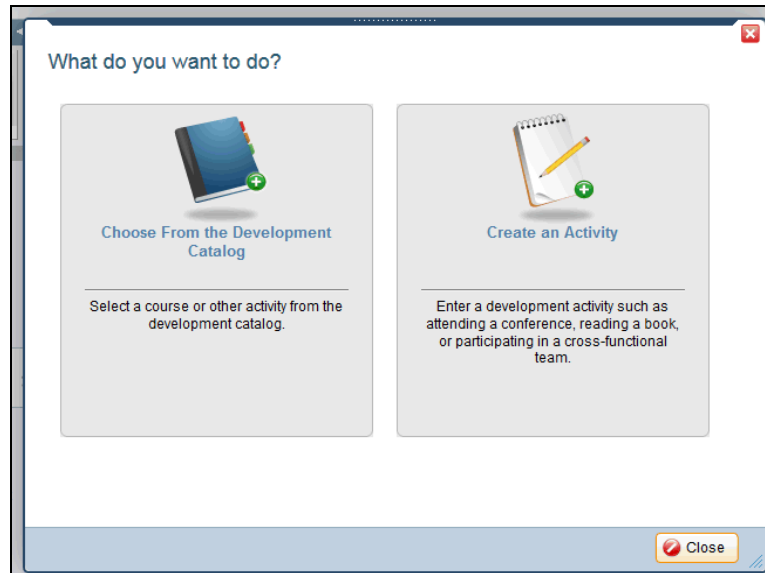
Development History

Development History- Summary_NP

Select View Show Filters Set Columns Save View Reports Charts Tutorial


Actions	Activity Name	Description	Type	Associations	Status	Priority	Development Goals	Start Date	Completed Date	Delete
There are no items to display.										

Step	Action
4.	Use this page to review your development history, upcoming activities, and to add new developmental activities to fulfill a current position requirement or career aspiration. In this example, you will add an activity.
5.	Click the Add button. 



Step	Action
6.	When adding an activity, you can either create an activity or select one from the development catalog. In this example, you will select from the development catalog.
7.	Click the Choose From the Development Catalog link.

Select Activity from Catalog



Step 1 Select Activity
Step 2 Provide Activity Details

Instructions
Below are the development activities available to you. Narrow your search by applying the filters on the left. You can register for a course or add yourself to the waiting list. The course will be added to your development plan where you can provide more details about your development goals and track your status as you progress.

Hide Filters Tutorial

Run Filter Clear Filter

Name	Location	Type	Suitability	Competency Name
Communication Skills Training	Waltham	Project	All Managers	
Finance and Strategic Business Skills	Waltham	Classroom	All Managers	
Interview a skilled team member. Ask this person what he or she does to effectively contribute to the team. Ask for specific examples.				
Leadership Course for New Managers	Waltham	Classroom	Entry Level Supervisors	
Management Training for the Global Workforce	Austin	Classroom	All Managers	
Network with your colleagues		Experience		
Observe others who are skilled in				

Step	Action
8.	This page displays the available developmental activities. You can either scroll through the page or search for a specific activity. Your course selection will be added to your development plan where you can provide more details about your developmental goals and track your progress.
9.	Scroll down the page.

Select Activity from Catalog




Step 1 Select Activity
Step 2 Provide Activity Details


Communication Skills Training	Waltham	Project	All Managers	
Finance and Strategic Business Skills	Waltham	Classroom	All Managers	
Interview a skilled team member. Ask this person what he or she does to effectively contribute to the team. Ask for specific examples.				
Leadership Course for New Managers	Waltham	Classroom	Entry Level Supervisors	
Management Training for the Global Workforce	Austin	Classroom	All Managers	
Network with your colleagues		Experience		
Observe others who are skilled in this competency.				
Project Management Training	Bangalore	Experience	Senior Management	
SkillSoft: Building Improved Work Relationships				
SkillSoft: The Value of Peer Relationships	Austin	Self Study		
Take advantage of each person's unique strengths and learn from them.				
Technology for Managers	Waltham	Classroom	All Managers	
Time Management Training	Waltham	Classroom	Professionals	
Work on understanding people without judging them				
Writing and Presentation Skills Training	Austin	Classroom	Professionals	


Page 1 of 1 displayed (15 total items) Rows per page: 20

Continue Cancel

Step	Action
10.	Click the appropriate Activity Name .
11.	Click the Continue button to provide details about the selected activity. 

Provide Development Activity Details



Step 1 Select Activity 

Step 2 Provide Activity Details

Instructions
Enter the development activity details and click Save. The activity will be added to your development plan where you can update your notes and track your status as you progress.

Activity Name: Management Training for the Global Workforce

Description: 3-day seminar for the Global Workforce - includes leadership skills, communication skills, time management and personal performance skills.

Development Goals:

Status:


Priority:

Start Date: 09/02/2014 *
(MM/dd/yyyy)

Completed Date:
(MM/dd/yyyy)

Score:

External URL:

Step	Action
12.	Use this page to enter activity details such as your developmental goals for this activity, status, and start date. Note, the Start Date will default to the date the activity is added. In this example, you will edit the Start Date.
13.	Enter the desired information into the Start Date field.
14.	Click the Save button. 

Welcome Logoff Help ?

Find Employees:

Talent Profile

Page Menu

 Performance
 Recognition
 Mobility & Travel
Development
 Journal
 Talent Assessment
 Career Plan

Competency Gap
Current Development Activities
 This section provides a comprehensive view of your current development plan. Any development activities you have added to your plan and/or associated to your career aspirations, performance goals, competency evaluations, etc. will appear here for tracking and follow-up. Click the icon to the left of each activity to edit the details or see additional options specific to that activity's status. Note: If you are not seeing updates reflected, please click the refresh button on your browser.

Select View Show Filters Set Columns Save View Reports Charts Tutorial

Actions	Activity Name	Description	Type	Associations	Status	Priority	Development Goals	Start Date	Completed Date
	Management Training for the Global Workforce	3-day seminar for the Global Workforce - includes More...	Classroom					09/30/2014	
	Business Analysis Training	2-day seminar on business analysis and developing More...	Classroom					09/24/2014	

Add Page 1 of 1 displayed (2 total items) Rows per page: 10

Step	Action
15.	Click the Home button.
16.	Notice, the My Development Activities section has been updated with your added activity.

About Me
 My Position: Admin Assistant 3
 My Department: HR - BH Site
 Profile Journal Goals / IDP Performance Recognition

My Company
 Donna Moss - A/P HR
 Susan Glindmeyer - Dir Empl Comm/Org Effect
 Abby Bartlett - Dir Human Resources
 Leo McGarry - Dir Human Resources
 Claudia Cregg - Dir HR - ON SITE BHM
 Toby Ziegler - Dir HR - Corporate
 Charlie Young - Admin Assistant 3

My Links
 You do not have any links.

My Tasks
 No Tasks

My Development Activities
 Show Filters Tutorial

Actions	Priority	Activity Name	Associations	Status	Start Date
		Business Analysis Training	1		09/24/2014

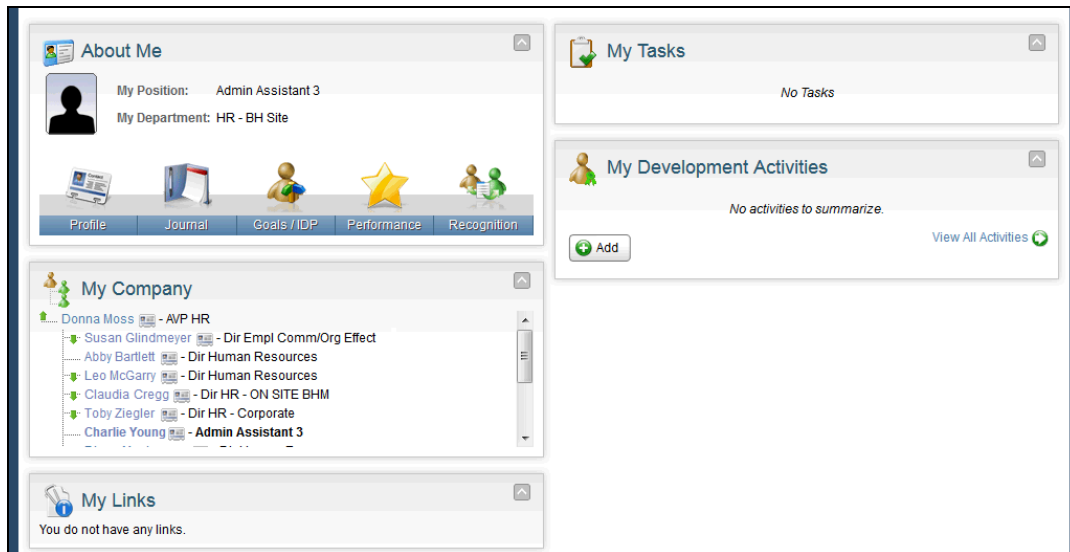
Add View All Activities

Step	Action
17.	Congratulations. You have updated and added a development activity. End of Procedure.

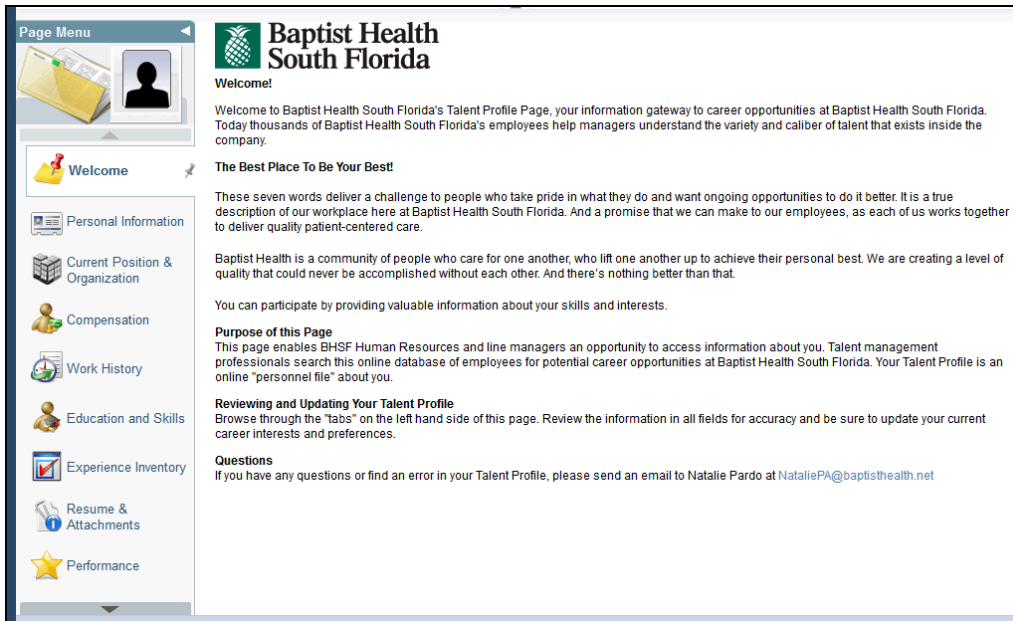
Reviewing and Updating Journal Entries in Your Talent Profile


Purpose: Use this transaction to practice reviewing and updating your journal entries in your Talent Profile.

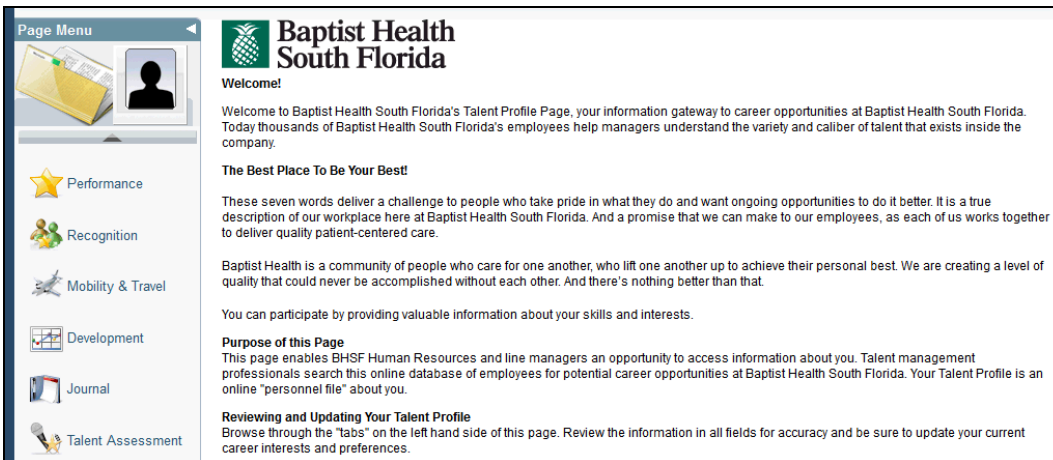
Step	Action
1.	To review and update your Journal Entries, you can click the Journal tab or you can access it through the Profile tab. In this example, you will access it through the Profile tab.



Step	Action
2.	Click the Profile tab.



Step	Action
3.	Click the Down Arrow button. 




Step	Action
4.	Click the Journal link.

Employee Entries

The employee journal can be used to capture notes about accomplishments and other things that you may refer to later when doing a self evaluation.


There are no items to display.




Manager / HR Entries

These are comments that your manager or Human Resources administrator has written for you to see and review.

There are no items to display.


Step	Action
5.	<p>Use this page to review past journal entries that you, your manager, or HR has entered regarding your performance.</p> <p>In this example, there are no existing entries. You can create an entry to note accomplishments, experiences, and other things you may refer to later when doing a self evaluation.</p>
6.	<p>Click the Add button.</p> <p style="text-align: center;"></p>


Add Journal Entry


Date: 9/30/14 10:21 AM EDT Author: Natalie Pardo 



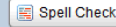
Journal Detail

Journal Entry Description:



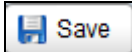
Visibility: Employee, Manager and Creator  *

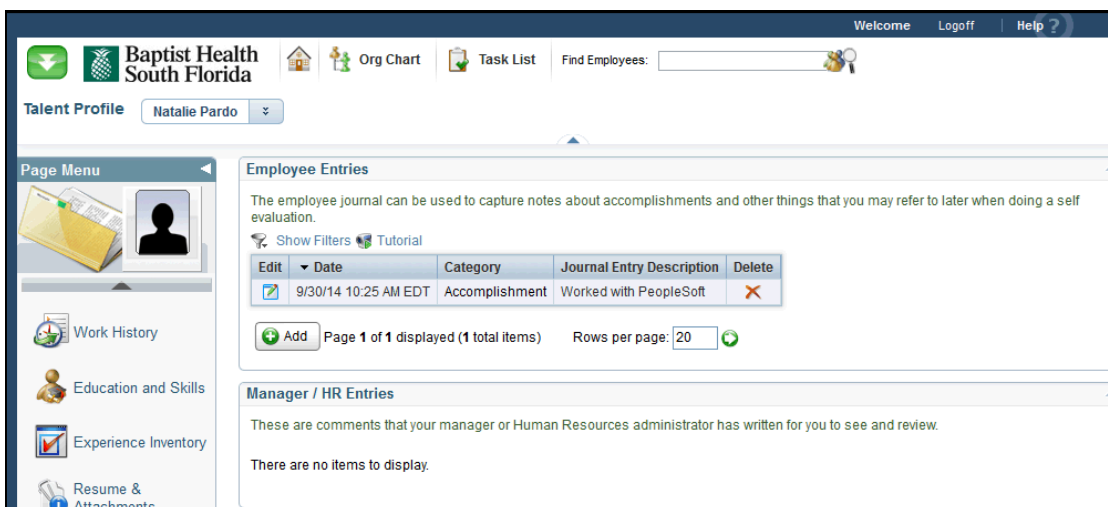
Category: ----- 

Notes: 






Step	Action
7.	Enter the desired information into the Journal Entry Description field.

Step	Action
8.	Click the button to the right of the Visibility field. 
9.	Use the visibility field to select who you would like to enable to view your entry. In this example, you will keep the default setting.
10.	Click the button to the right of the Category field. 
11.	Click the appropriate Category list item.
12.	Use the Notes field to enter a description regarding your accomplishment, coaching, or development entry.
13.	Enter the desired information into the Notes field.
14.	Click the Save button. 

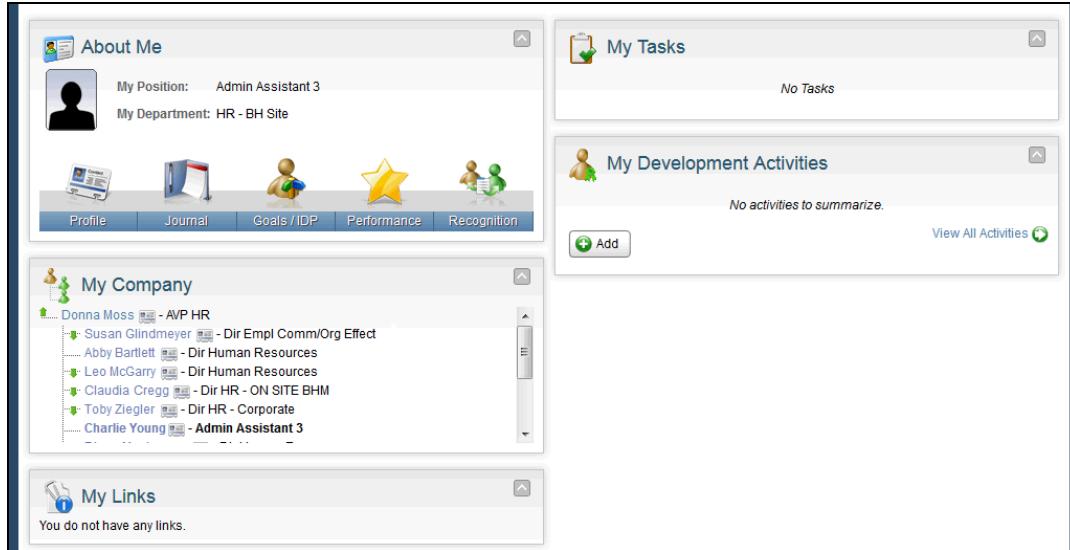


The screenshot shows the Baptist Health South Florida Talent Profile for Natalie Pardo. The 'Employee Entries' section is active, displaying a table with one entry: 9/30/14 10:25 AM EDT, Accomplishment, Worked with PeopleSoft. The 'Manager / HR Entries' section is empty, showing 'There are no items to display.'

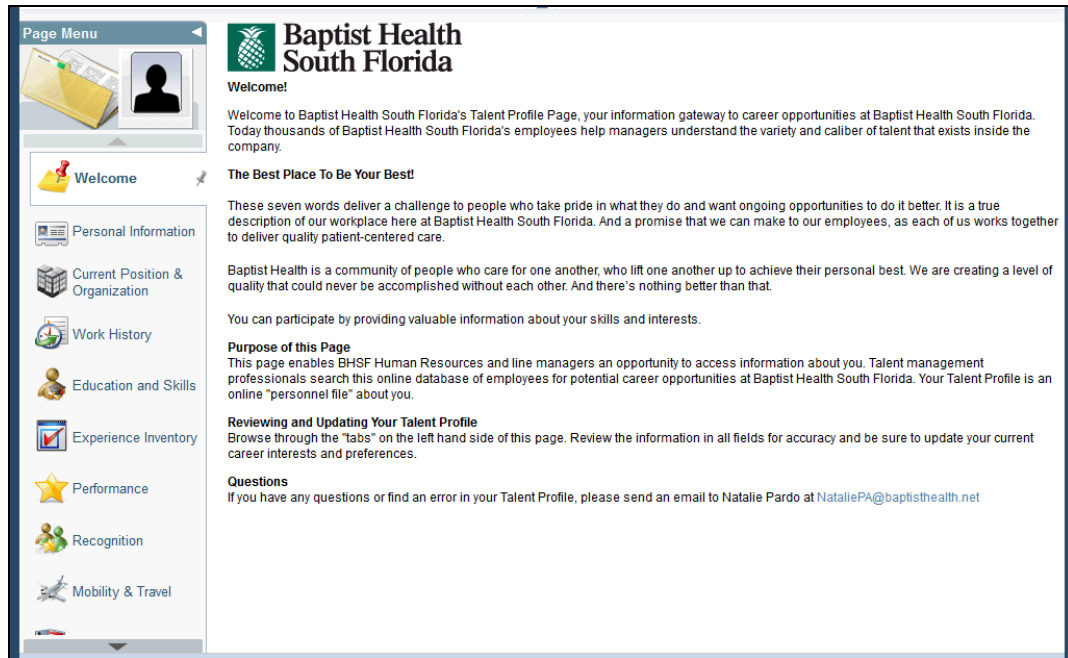
Step	Action
15.	Notice, the Employee Entries section has been updated with your journal entry.
16.	Click the Home button. 
17.	Congratulations. You have reviewed and added a journal entry. End of Procedure.


Using Career Plan in Your Talent Profile

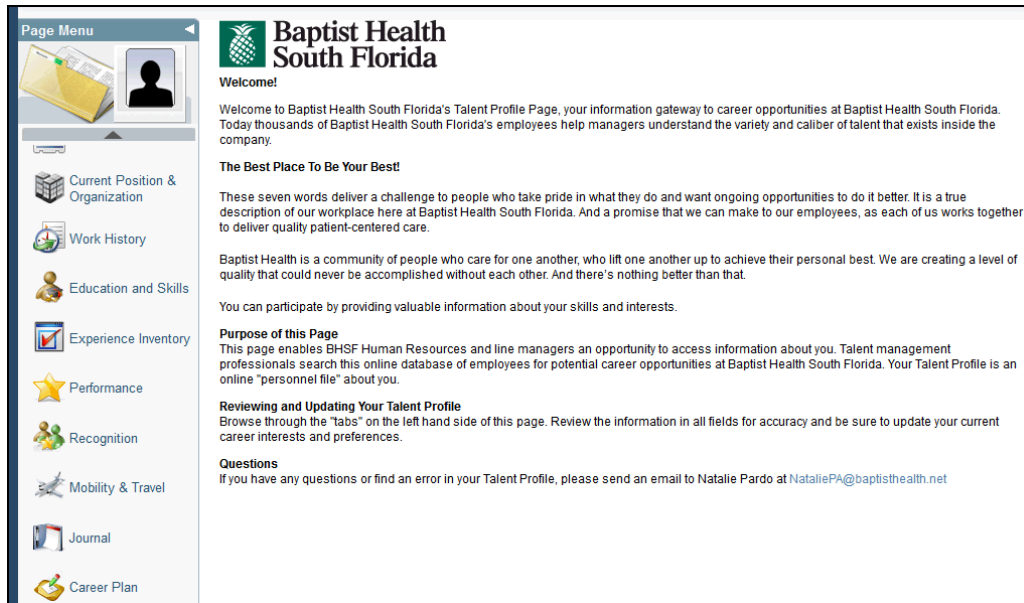
Purpose: Use this transaction to practice using the Career Plan tools, including Career Path and Career Aspiration in your Talent Profile.



Step	Action
1.	Click the Profile tab.

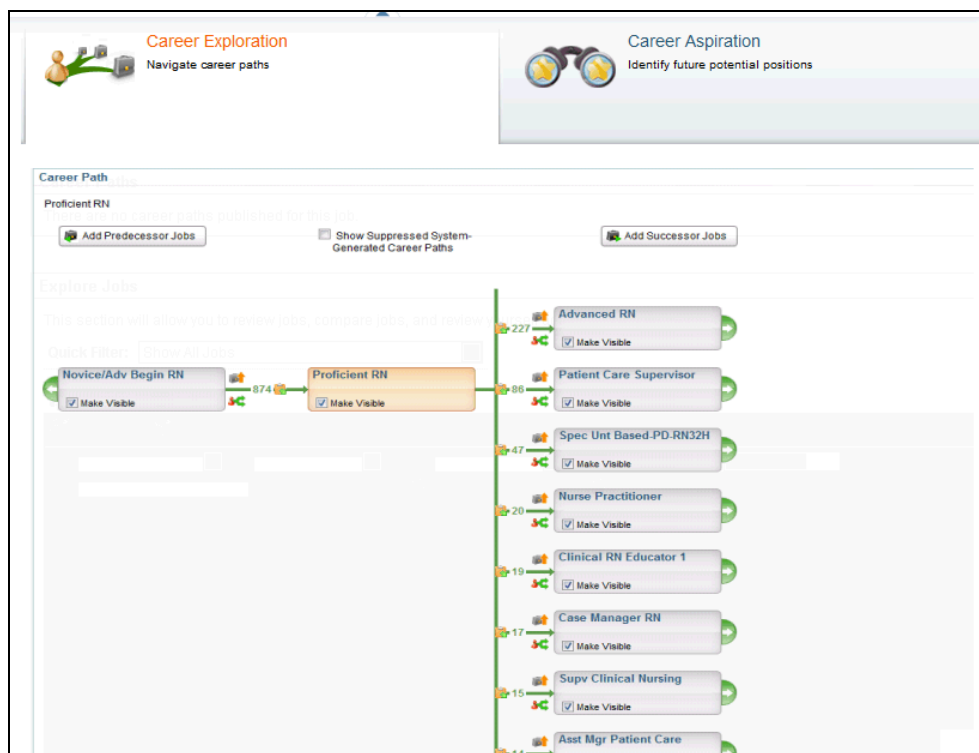


Step	Action
2.	Click the Down Arrow button. 



The screenshot shows the Baptist Health South Florida Talent Profile page. On the left is a 'Page Menu' with icons for: Current Position & Organization, Work History, Education and Skills, Experience Inventory, Performance, Recognition, Mobility & Travel, Journal, and Career Plan. The main content area features the Baptist Health South Florida logo and a 'Welcome!' message. Below this, there are sections for 'The Best Place To Be Your Best!', 'Purpose of this Page', 'Reviewing and Updating Your Talent Profile', and 'Questions'. The 'Questions' section includes an email address: NataliePA@baptisthealth.net.

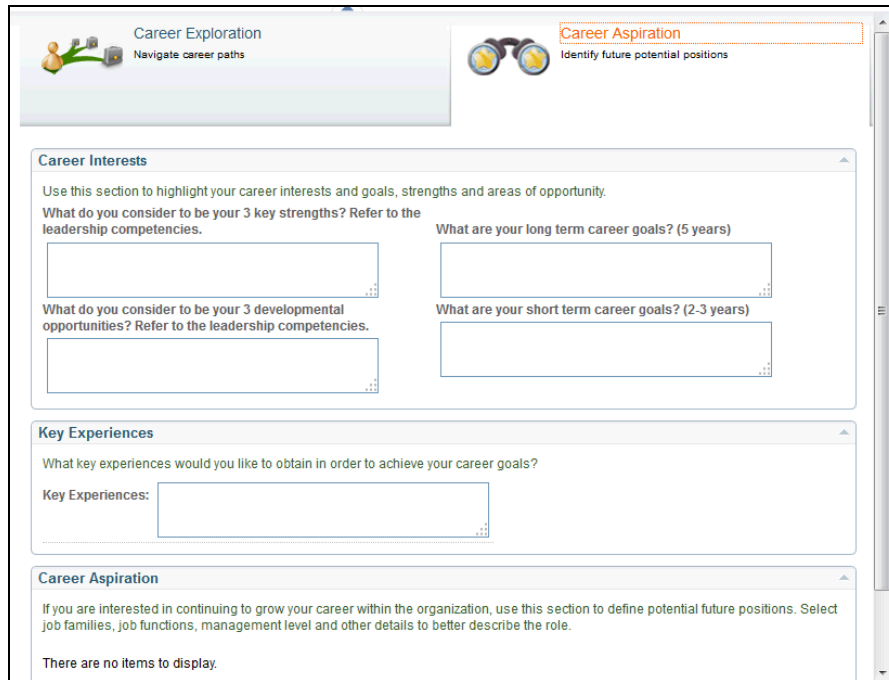
Step	Action
3.	Click the Career Plan link.



The screenshot displays the 'Career Exploration' and 'Career Aspiration' interface. The 'Career Exploration' section is titled 'Navigate career paths' and shows a 'Career Path' for a 'Proficient RN'. It includes buttons for 'Add Predecessor Jobs', 'Show Suppressed System-Generated Career Paths', and 'Add Successor Jobs'. The 'Explore Jobs' section shows a flow from 'Novice/Adv Begin RN' (874 jobs) to 'Proficient RN' (88 jobs). To the right, a list of potential career paths is shown, each with a 'Make Visible' checkbox and a count of jobs:

- Advanced RN (227 jobs)
- Patient Care Supervisor (88 jobs)
- Spec Unt Based PD-RN32H (47 jobs)
- Nurse Practitioner (20 jobs)
- Clinical RN Educator 1 (19 jobs)
- Case Manager RN (17 jobs)
- Supv Clinical Nursing (15 jobs)
- Asst Mgr Patient Care (14 jobs)

Step	Action
4.	Use the Career Exploration page to navigate career paths for your job.
5.	Click the Career Aspiration link.



Career Exploration
Navigate career paths

Career Aspiration
Identify future potential positions

Career Interests

Use this section to highlight your career interests and goals, strengths and areas of opportunity.

What do you consider to be your 3 key strengths? Refer to the leadership competencies.

What are your long term career goals? (5 years)

What do you consider to be your 3 developmental opportunities? Refer to the leadership competencies.

What are your short term career goals? (2-3 years)

Key Experiences

What key experiences would you like to obtain in order to achieve your career goals?

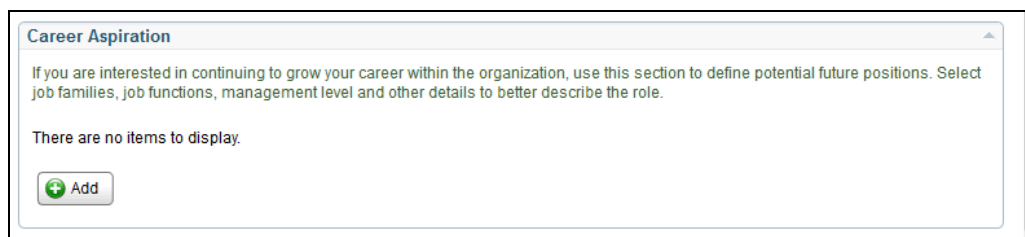
Key Experiences:

Career Aspiration

If you are interested in continuing to grow your career within the organization, use this section to define potential future positions. Select job families, job functions, management level and other details to better describe the role.

There are no items to display.


Step	Action
6.	Use the Career Aspiration page to highlight your career interests, goals, future experiences likely to help you obtain your goals, and identify future potential positions. In this example, you will add a career aspiration.
7.	Scroll down the page.




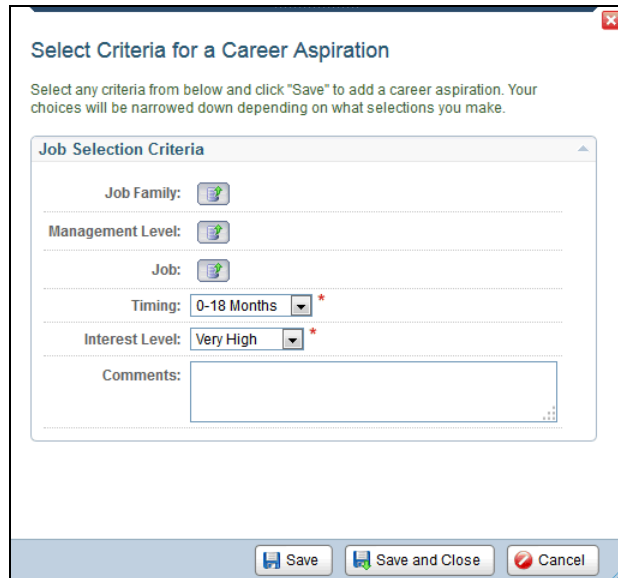
Career Aspiration


If you are interested in continuing to grow your career within the organization, use this section to define potential future positions. Select job families, job functions, management level and other details to better describe the role.

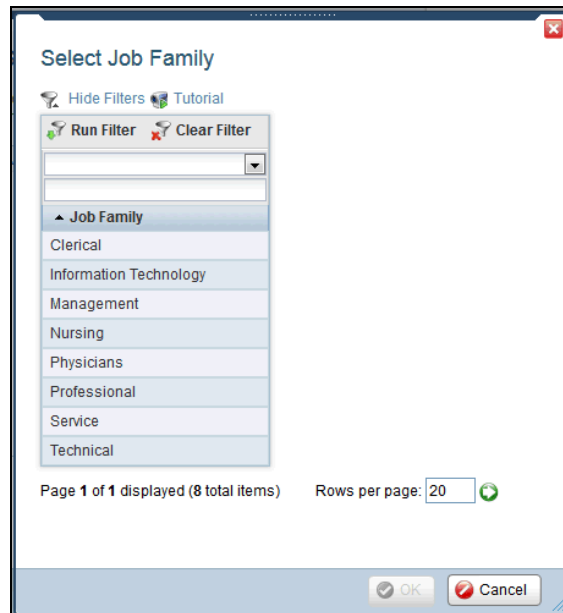
There are no items to display.




Step	Action
8.	Click the Add button. 

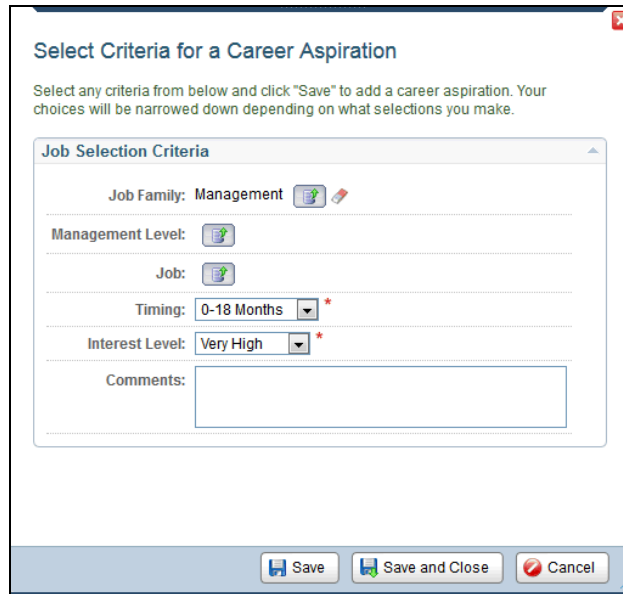


Step	Action
9.	Use this page to search for and select a career aspiration. To narrow your search results, select the appropriate job selection criteria.
10.	Click the Select button to search and select a job family. 



Step	Action
11.	Click the appropriate Job Family .

Step	Action
12.	Click the OK button. 



Select Criteria for a Career Aspiration

Select any criteria from below and click "Save" to add a career aspiration. Your choices will be narrowed down depending on what selections you make.

Job Selection Criteria

Job Family: Management

Management Level:


Job:

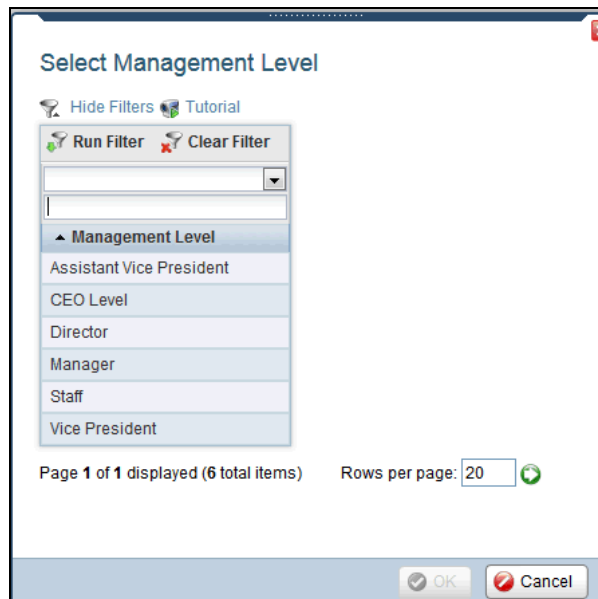
Timing: 0-18 Months *

Interest Level: Very High *

Comments:

Save Save and Close Cancel

Step	Action
13.	Click the Select button to search and select a management level. 



Select Management Level

Hide Filters Tutorial


Run Filter Clear Filter


Management Level

- Assistant Vice President
- CEO Level
- Director
- Manager
- Staff
- Vice President

Page 1 of 1 displayed (6 total items) Rows per page: 20

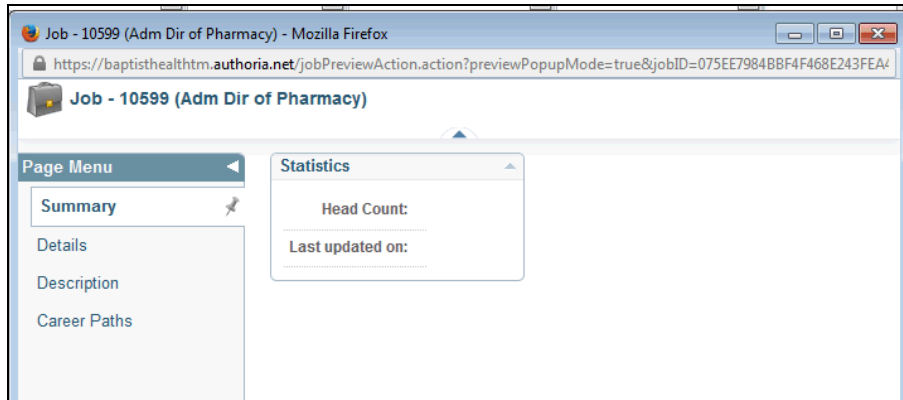
OK Cancel

Step	Action
14.	These are the available management levels. In this example, you're not going to select a management level.
15.	Click the Cancel button. 

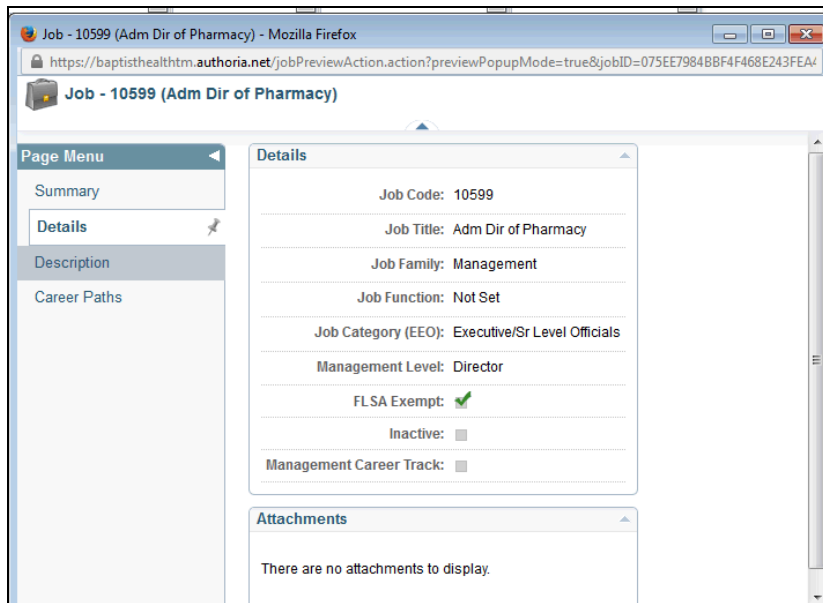
Step	Action
16.	Click the Select button to select a job. 

Title	Job Code	Job Family	Management Level
Adm Dir of Pharmacy	10599	Management	Director
Admin Diabetes Clinic	11217	Management	Manager
Admin Dir BH Staff Ntwk	11343	Management	Director
Admin Dir Emergency Svcs	10433	Management	Director
Admin Dir Rehab Services	10058	Management	Director
Admin Project Director	10459	Management	Director
Administrative Dir BCVI	10221	Management	Director
Ambassador Int'l Svcs	13152	Management	Vice President

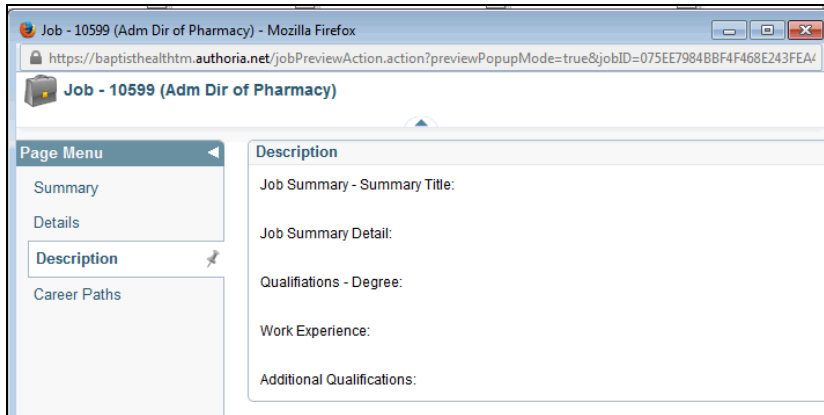
Step	Action
17.	Click the appropriate Job Title link. This will open information about the selected job in a new window.



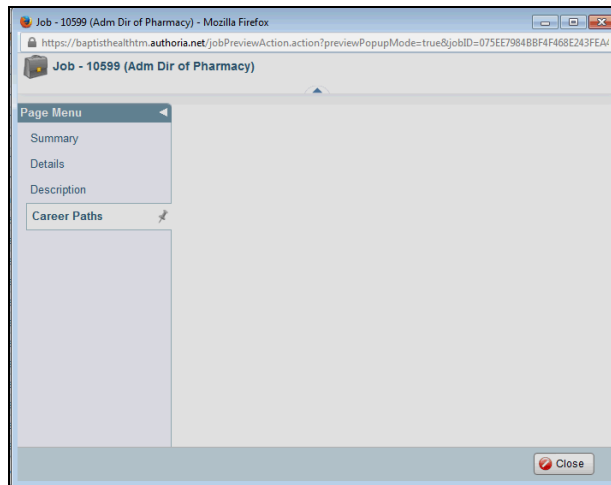
Step	Action
18.	Navigate the Page Menu to view more information about the selected job, including: a summary, details, description, and associated career paths.
19.	Click the Details link.



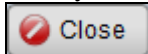
Step	Action
20.	Click the Description link.

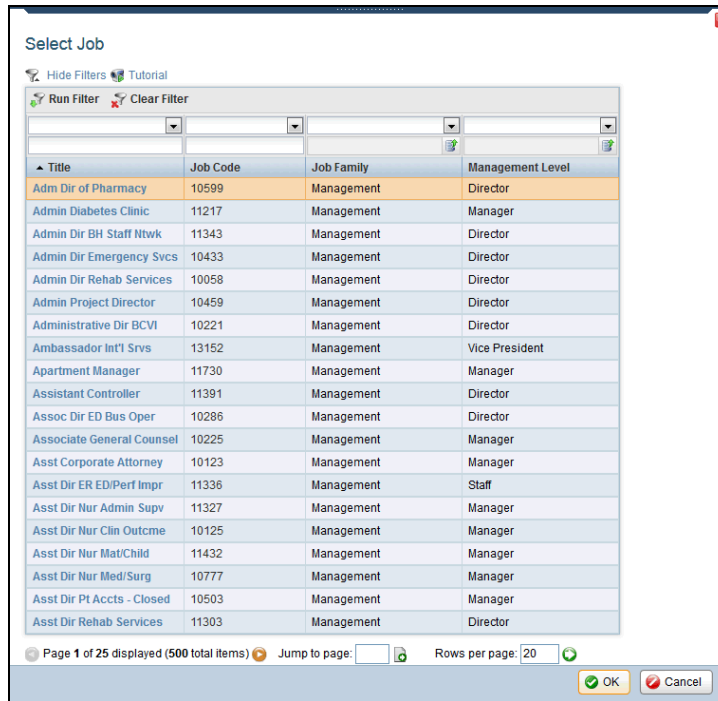


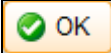
Step	Action
21.	Click the Career Paths link.

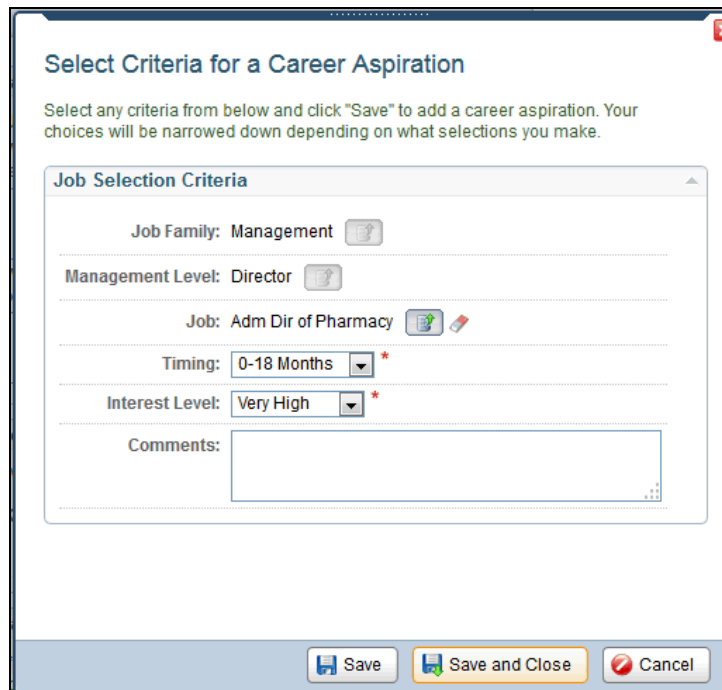


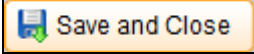
Step	Action
22.	Once you have reviewed the job information, click the Close button.

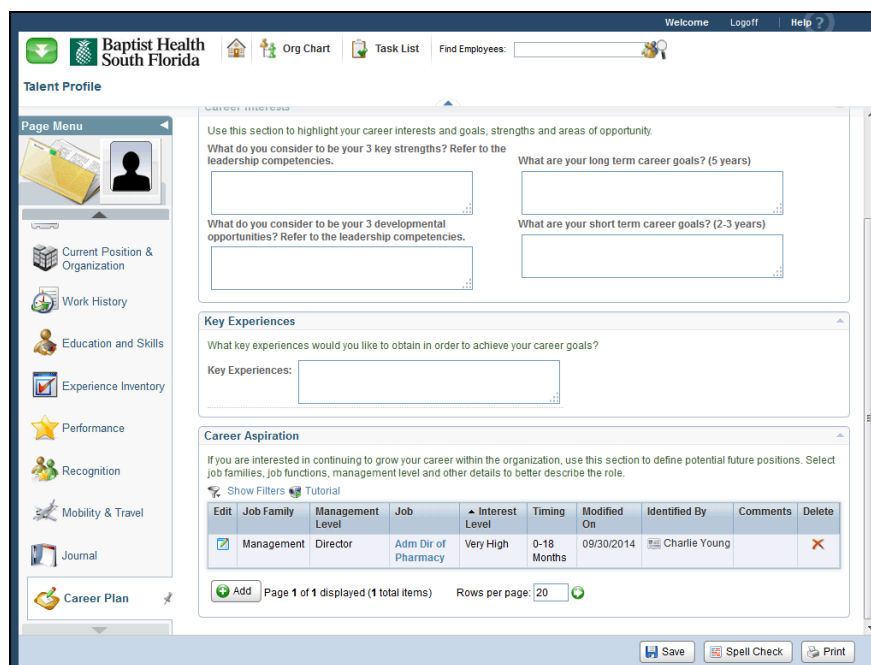





Step	Action
23.	Click the appropriate Job Code .
24.	Click the OK button. 



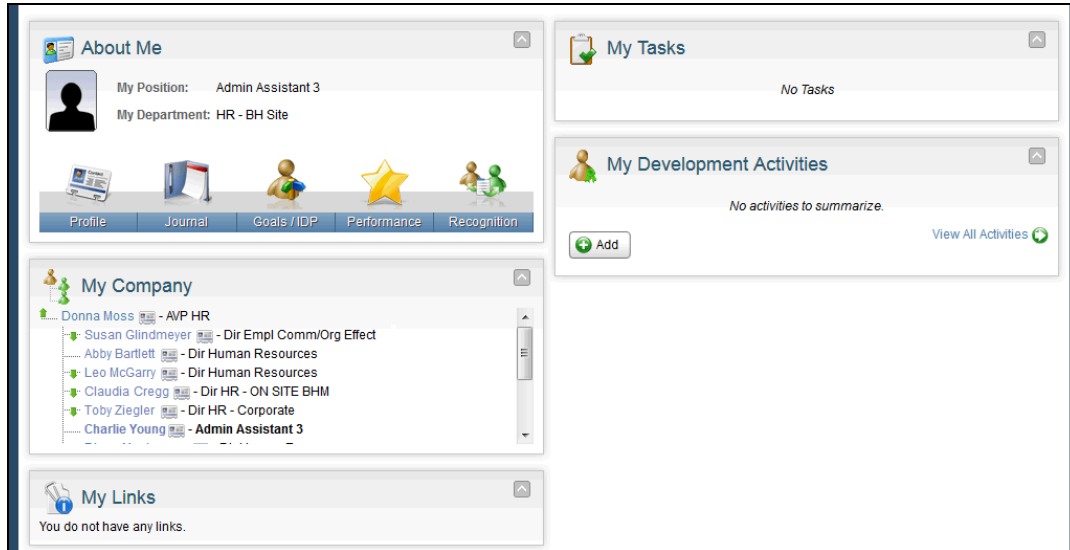
Step	Action
25.	In the timing field, select a time frame in which you want to achieve the selected career aspiration. In this example, you want to achieve your goal in 0-18 months. Use the Interest Level field to indicate your interest in achieving the selected career aspiration. In this example, you are very interested in accomplishing your goal.
26.	Finally, use the Comments field for additional notes regarding the selected career aspiration.
27.	Click the Save and Close button to add your selected job to your career aspirations. 



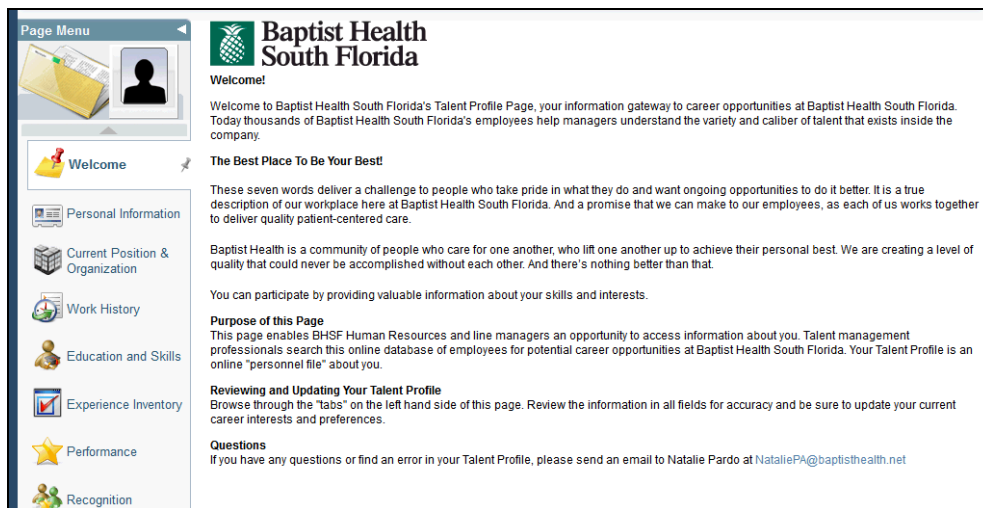
Step	Action
28.	You can view, edit, and delete your saved career aspiration here.
29.	Click the Home button. 
30.	Congratulations. You have used the Career Plan tools to navigate a career path and update your career aspirations. End of Procedure.

Reviewing and Sending Recognition Information in Your Talent Profile

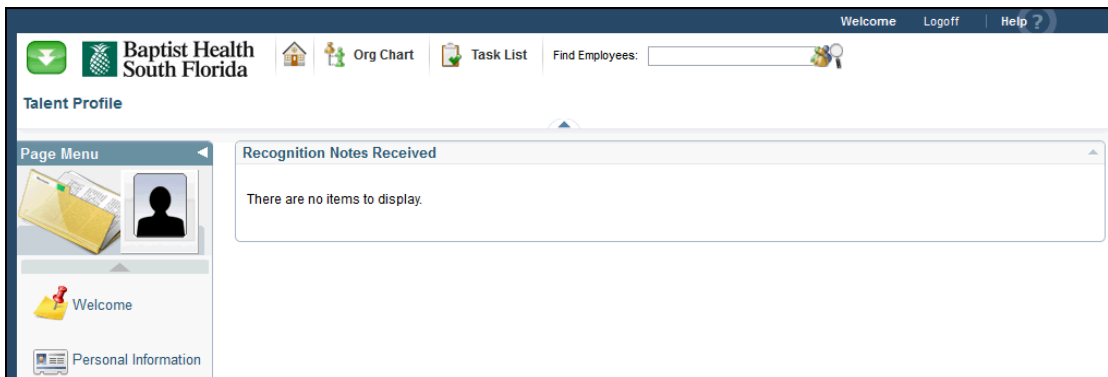
Purpose: Use this transaction to practice reviewing information and sending recognition notes in your Talent Profile.




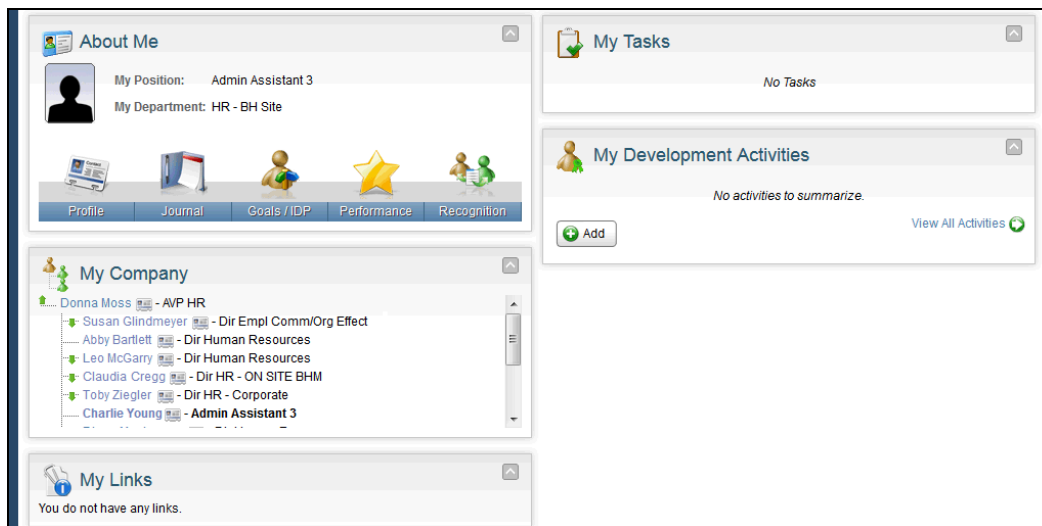
Step	Action
1.	In this example, you will both review a recognition note and send one to another employee. To begin, you will review a note.
2.	Click the Profile tab.



Step	Action
3.	Click the Recognition link.



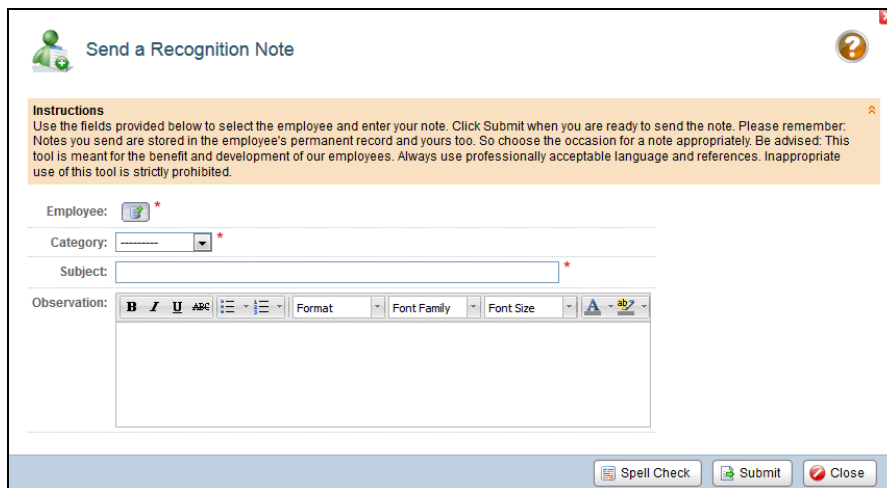
Step	Action
4.	Use this page to review recognition notes others have sent regarding you. In this example, this employee does not have any recent recognition notes.
5.	Click the Home button. 




Step	Action
6.	Click the Recognition tab.
7.	Here you can select to send a recognition note or view recognition notes you have sent and/or received from others. In this example, you will send a recognition note.


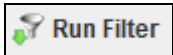


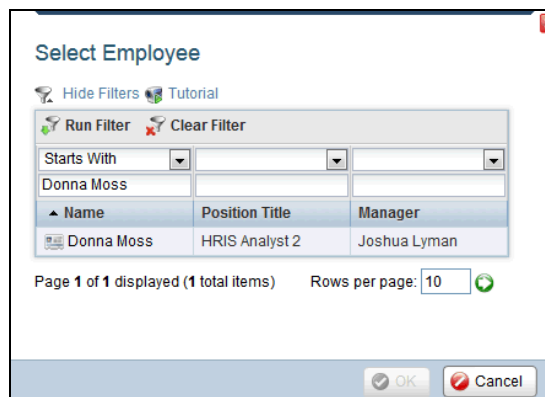
Step	Action
8.	Click the Send a Recognition Note link.




Step	Action
9.	Use this page to select an employee and enter your note. Once you are ready, click the Submit button. Note, this tool is for developmental purposes, and once a note has been sent, it is saved in the employee's file and yours.
10.	Click the Select button to select an Employee. 





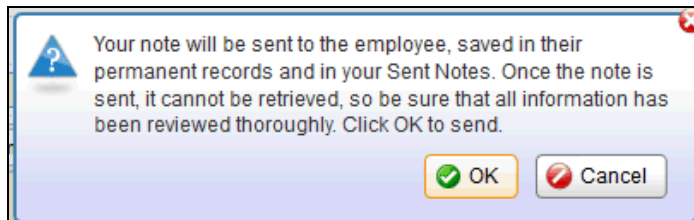
Step	Action
11.	To search for an employee, you can search by Name, Position Title, or Manager. In this example, you will search by Name.
12.	Click the button to the right of the Filter Name field. 
13.	Click the appropriate Filter Name list item.
14.	Enter the desired information into the Search Name field.
15.	Click the Run Filter button. 

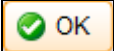


Step	Action
16.	Click the appropriate Name .

Step	Action
17.	Click the OK button. 

Step	Action
18.	Click the button to the right of the Category field. 
19.	Click the appropriate Category list item.
20.	Enter the desired information into the Subject field.
21.	Enter the desired information into the Notes field.
22.	Click the Submit button. 



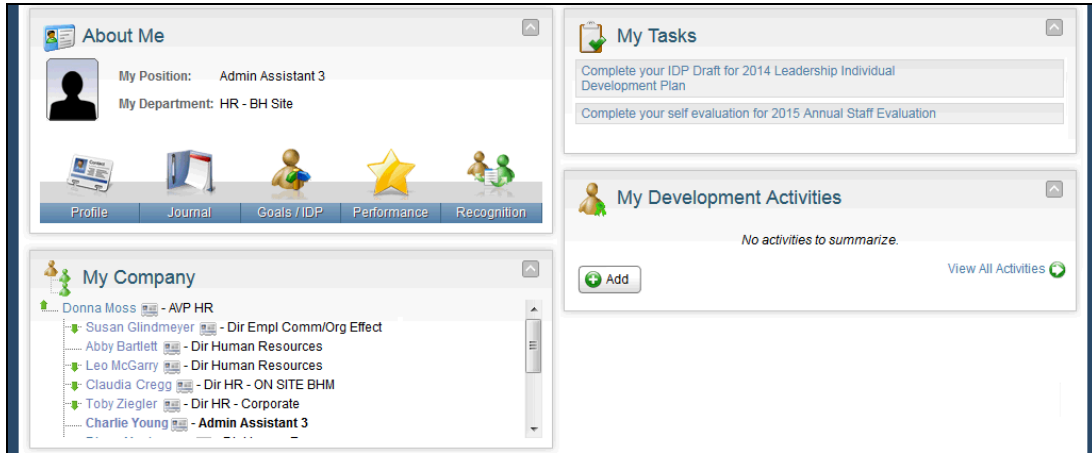
Step	Action
23.	Read the message. Click the Cancel button to return and edit the message. Click the OK button to submit the message. In this example, click the OK button. 

Step	Action
24.	Congratulations. You have reviewed recognition information and sent a recognition note. End of Procedure.

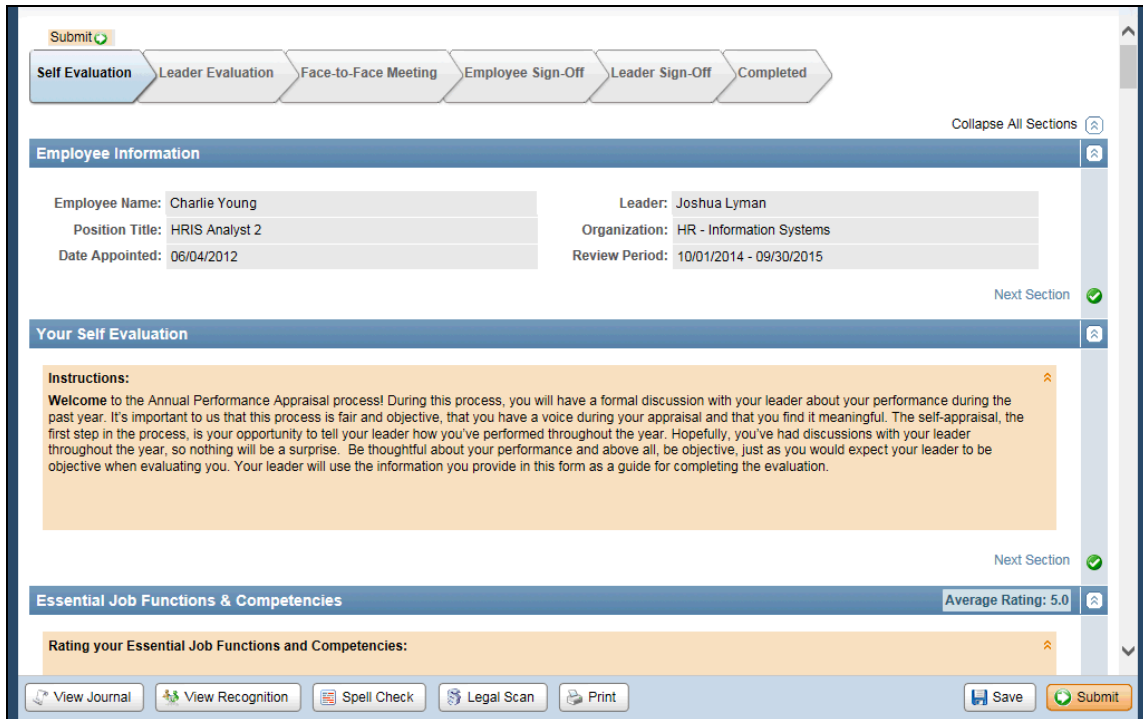
Managing Performance Management

Completing a Self Evaluation

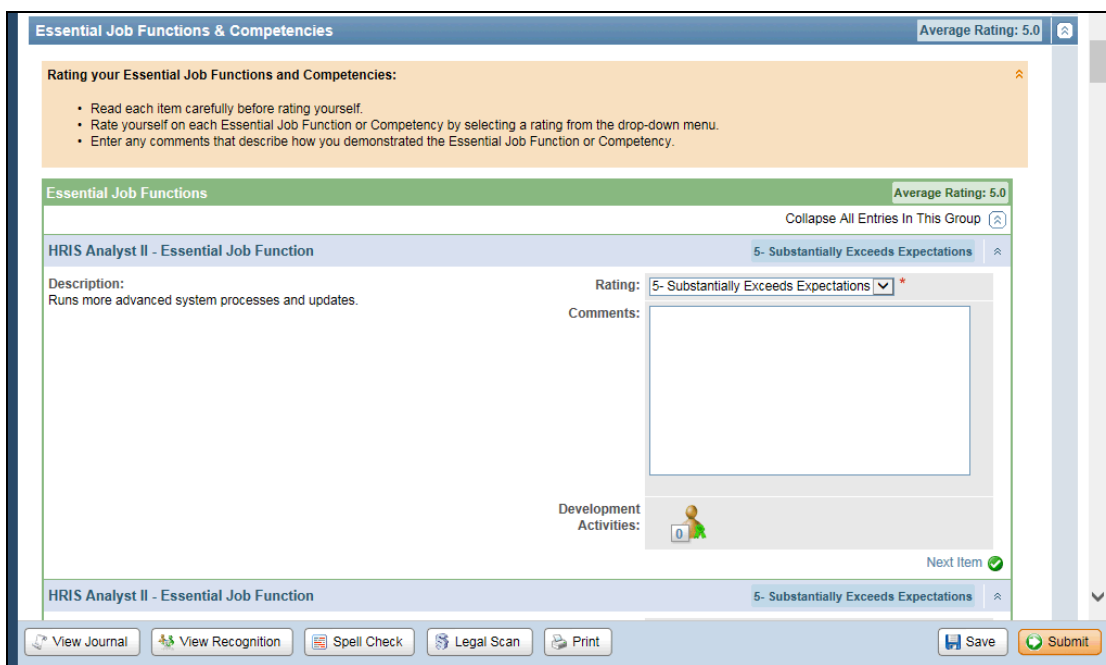
Purpose: Use this transaction to practice completing a self evaluation.




Step	Action
1.	Click the Complete your self evaluation for 2015 Annual Staff Evaluation link.



Step	Action
2.	Use the Self Evaluation page to rate yourself on essential job functions and competencies. Be thoughtful on your ratings, and be objective. Once you have completed the self evaluation, your leader will evaluate you. To view all steps of the process, and where your evaluation is in the process, look at the flow chart in the top left corner of the page.
3.	Click the vertical scrollbar.
4.	When rating your essential job functions and competencies, read each item carefully. Then, rate yourself by selecting a rating from the drop-down menu. Finally, for any high or low rating, or to add any additional comments regarding your performance, enter your notes in the Comments field. Individual comments are not required, unless they are requested by your leader.



Step	Action
5.	Click the button to the right of the Rating field. 
6.	Select the appropriate Rating list item.
7.	Scroll down the page.

HRIS Analyst II - Essential Job Function 5- Substantially Exceeds Expectations


Description:
Creates and develops reports, queries, presentations of data and provides support on special projects. Completes other analysis and modeling tasks and projects as assigned.

Rating: 5- Substantially Exceeds Expectations

Comments:

Development Activities:

Next Item

Step	Action
8.	Click the button to the right of the Rating field. 
9.	Select the appropriate Rating list item.
10.	Enter the desired information into the Comments field.
11.	Be sure to scroll down and rate all Essential Job Functions before rating your job Competencies. In this example, the remaining Essential Job Function ratings have been entered for you.
12.	Scroll down the page.

Competencies Average Rating: 5.0

Collapse All Entries In This Group

SELF-DEVELOPMENT 5- Towering Strength

Description:
Is personally committed to and actively works to continuously improve.

Behaviors:


- Asks questions in order to learn.
- Identifies areas to improve and asks for training in those areas.
- Regularly uses training and development classes to learn and build new skills.
- Shows the initiative and motivation for gaining greater expertise in his/her area.
- Strives to learn new skills and apply them on the job.
- Takes on new challenges and roles.


Rating: 5- Towering Strength

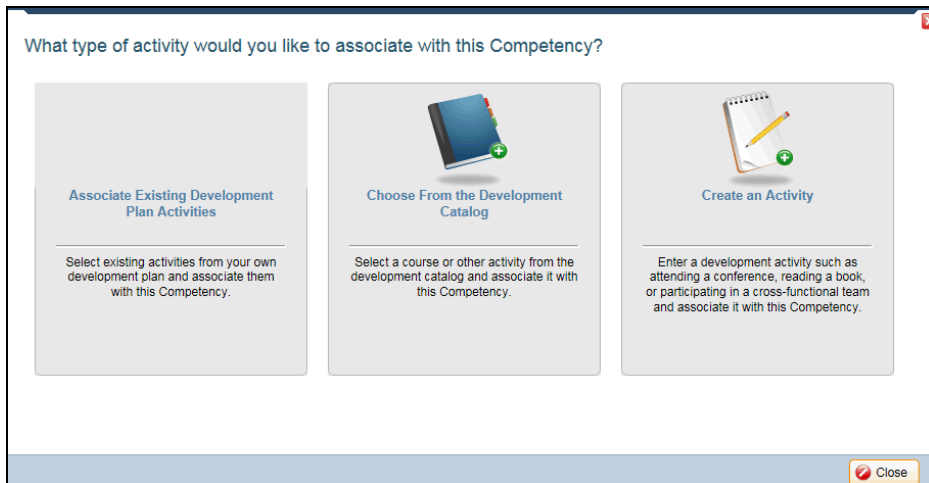
Comments:

Development Activities:

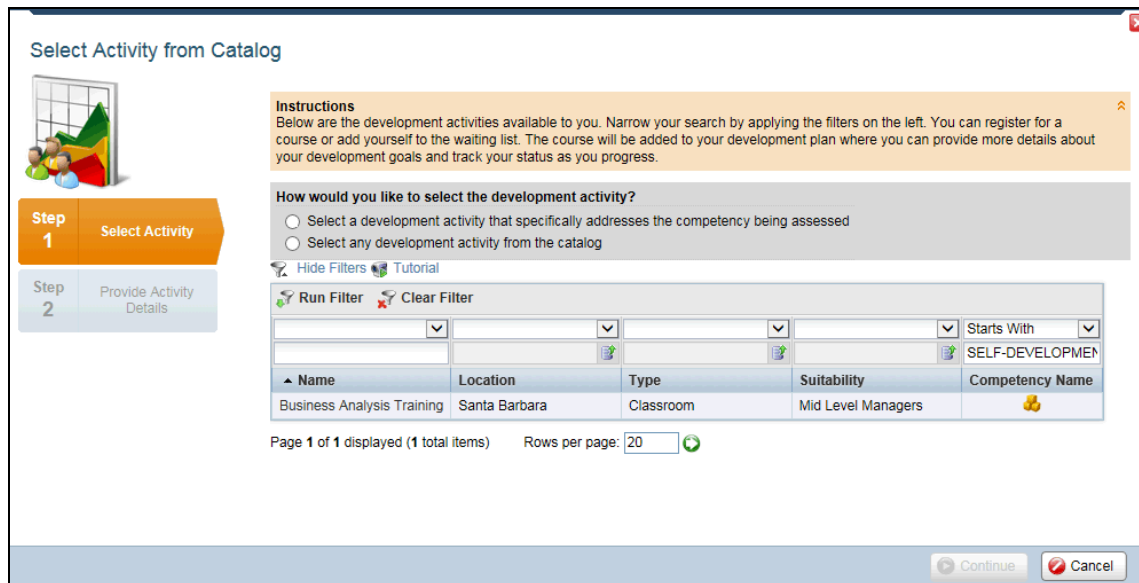
Next Item


Step	Action
13.	Click the button to the right of the Rating field. 
14.	Select the appropriate Rating list item.


Step	Action
15.	To add a development activity associated with a competency, click the Development Activities button. 

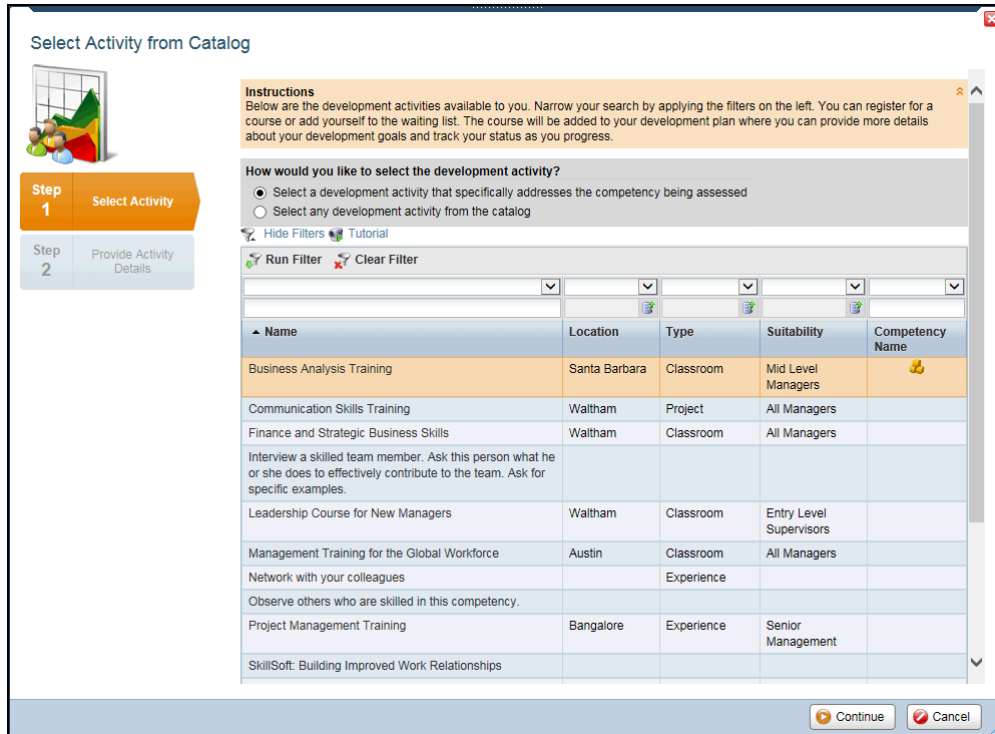


Step	Action
16.	Click the Choose From the Development Catalog link.



Step	Action
17.	Click the Select a development activity that specifically addresses the competency being assessed option. 

Step	Action
18.	Click the Run Filter button. 



Select Activity from Catalog

Instructions
Below are the development activities available to you. Narrow your search by applying the filters on the left. You can register for a course or add yourself to the waiting list. The course will be added to your development plan where you can provide more details about your development goals and track your status as you progress.

How would you like to select the development activity?

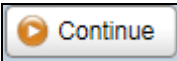
Select a development activity that specifically addresses the competency being assessed
 Select any development activity from the catalog

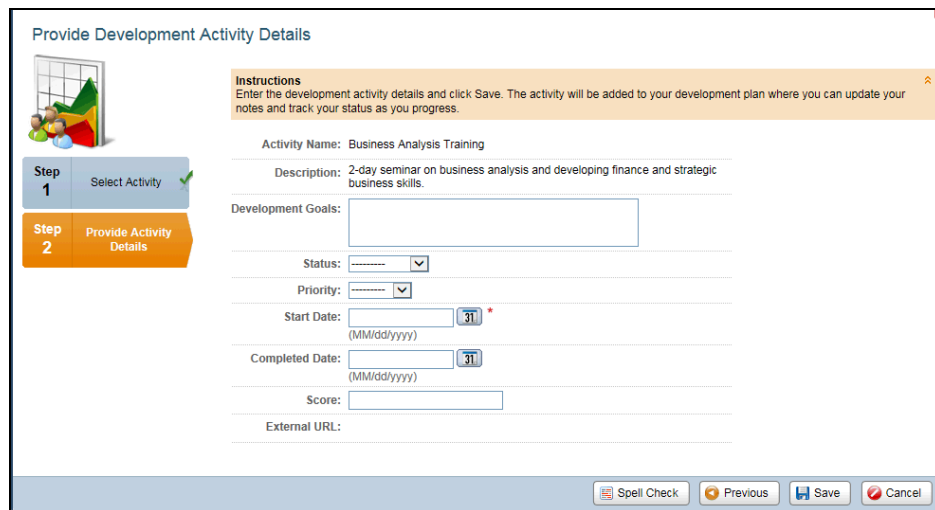
Hide Filters Tutorial

Run Filter Clear Filter

Name	Location	Type	Suitability	Competency Name
Business Analysis Training	Santa Barbara	Classroom	Mid Level Managers	
Communication Skills Training	Waltham	Project	All Managers	
Finance and Strategic Business Skills	Waltham	Classroom	All Managers	
Interview a skilled team member. Ask this person what he or she does to effectively contribute to the team. Ask for specific examples.				
Leadership Course for New Managers	Waltham	Classroom	Entry Level Supervisors	
Management Training for the Global Workforce	Austin	Classroom	All Managers	
Network with your colleagues		Experience		
Observe others who are skilled in this competency.				
Project Management Training	Bangalore	Experience	Senior Management	
SkillSoft: Building Improved Work Relationships				

Continue Cancel

Step	Action
19.	Click the appropriate Development Activity Name .
20.	Click the Continue button. 



Provide Development Activity Details

Instructions
Enter the development activity details and click Save. The activity will be added to your development plan where you can update your notes and track your status as you progress.

Activity Name: Business Analysis Training

Description: 2-day seminar on business analysis and developing finance and strategic business skills.

Development Goals:

Status:

Priority:


Start Date: 31 *
(MM/dd/yyyy)

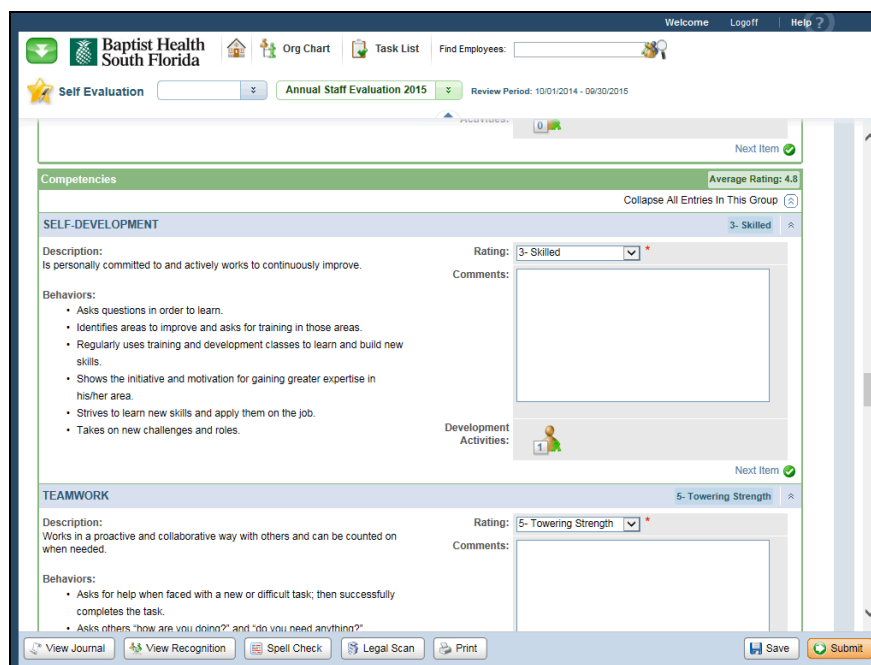
Completed Date: 31
(MM/dd/yyyy)

Score:

External URL:

Spell Check Previous Save Cancel

Step	Action
21.	Use the Activity Details page to enter additional information regarding the activity including development goals and a start date.
22.	Enter the desired information into the Start Date field.
23.	Click the Save button. 
24.	Notice, the Development Activities button now shows 1.



Step	Action
25.	Scroll down the page.
26.	Next, be sure to rate all Competencies on your self evaluation. Some sample competencies include: Teamwork, Customer Service, and Action Oriented. In this example, the remaining competency ratings have been entered for you.

Overall Performance 5- Substantially Exceeds Expectations

This section shows your overall rating which is automatically calculated from the above Essential Job Function and Competency ratings:


- Please enter your strengths and accomplishments, opportunities for improvement and any additional comments you have in the spaces provided below.
- If you wish, you can note any specific development activities, such as courses, projects, etc., you plan to pursue.

Employee Calculated Overall Rating: 4.85

My Additional Comments:

Employee Attachments: [Add Attachments](#)


[View Journal](#)
[View Recognition](#)
[Spell Check](#)
[Legal Scan](#)
[Print](#)
[Save](#)
[Submit](#)

Step	Action
27.	The Overall Performance section shows your overall rating. This rating is automatically calculated from your Essential Job Function and Competency ratings. Each category is equally weighted at 50%. In this example, your overall rating is 4.85.
28.	If you have provided high or low ratings in the self-evaluation, use the My Additional Comments section to comment on your overall performance paying particular attention to the areas scored high or low. You may also enter strengths, accomplishments, and any other details you wish to provide for your leader.
29.	Once you have completed all ratings and entered all comments, click the Submit button. 

Submit

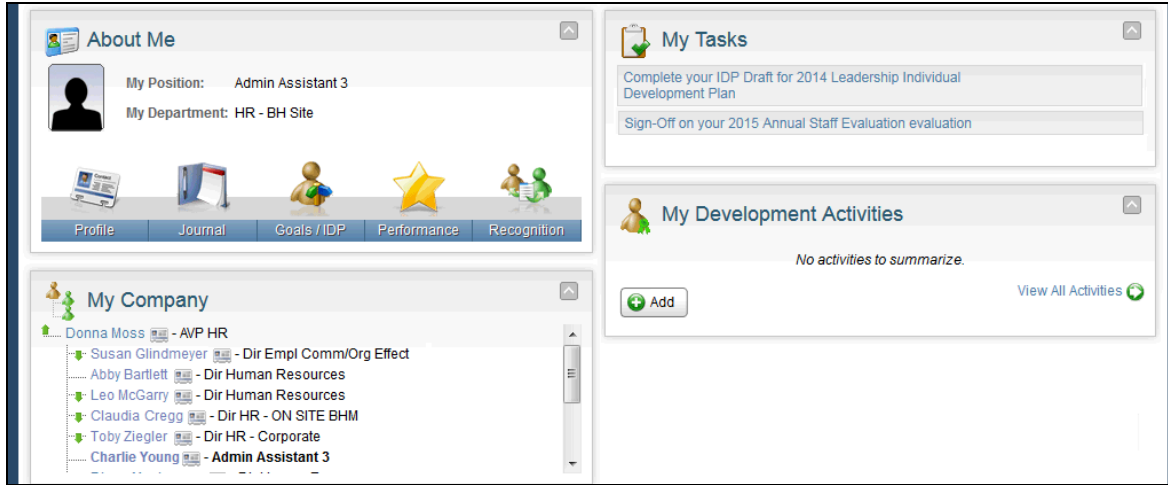
Submit your self-evaluation to your manager. Review all of your entries for accuracy and completeness before you submit.

Comment:

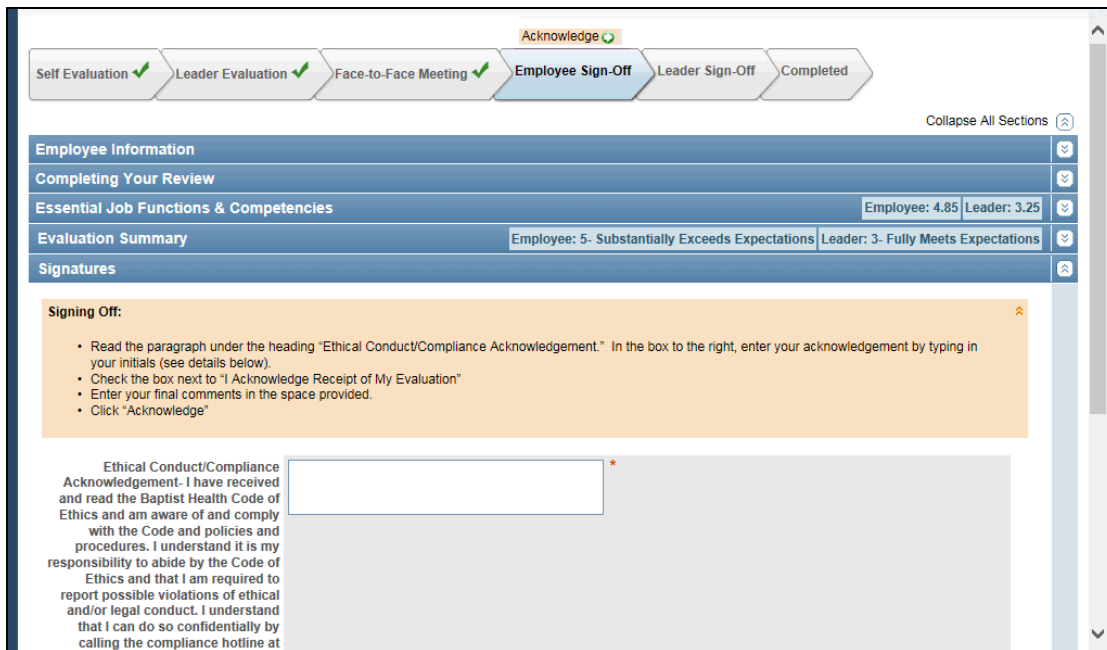
Step	Action
30.	Enter the desired information into the Comment field.
31.	Click the OK button. 
32.	Congratulations. You have completed a self evaluation. End of Procedure.

Signing Your Evaluation

Purpose: Use this transaction to practice signing-off on your self evaluation.



Step	Action
1.	Click the Sign-Off on your 2015 Annual Staff Evaluation evaluation link.



Step	Action
2.	Once you have completed your face-to-face meeting with your leader, you need to sign-off on your evaluation. Read the Signing Off instructions.

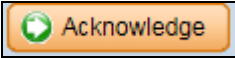
Step	Action
3.	Enter your initials into the Ethical Conduct/Compliance Acknowledgement field.
4.	Scroll down the page.

I Acknowledge Receipt of My Evaluation: Click the check box if your leader has conveyed your performance evaluation to you. Checking the box does not necessarily imply agreement; it simply acknowledges that a conversation between you and your leader has taken place.

*

Employee Final Comment:

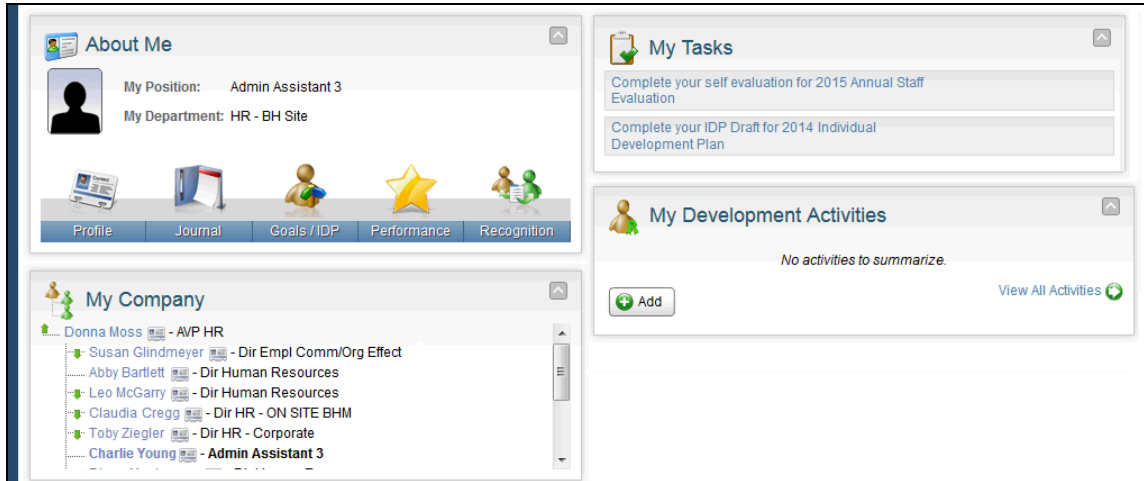
View Journal View Recognition Spell Check Legal Scan Print Save Acknowledge

Step	Action
5.	Click the I Acknowledge Receipt of My Evaluation option. <input type="checkbox"/>
6.	Use the Employee Final Comment field to enter any last comments you feel necessary to add. In this example, there are no final comments to enter.
7.	Click the Acknowledge button. 
8.	After an employee has signed and submitted the evaluation form, it is the responsibility of the leader to sign and complete the process.
9.	Congratulations. You have signed-off on your self evaluation. End of Procedure.

Managing Individual Development Plans

Managing Your Individual Development Plan

Purpose: Use this transaction to practice managing your individual development plan.



Step	Action
1.	Click the appropriate My Tasks link. <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> Complete your IDP Draft for 2014 Individual Development Plan </div>
2.	<p>An Individual Development Plan is a tool to assist leaders in career and personal development. To complete your IDP, review the list of competencies and their behaviors. Then identify two competencies that you would like to improve upon. You may add additional competencies if you like. Note, the competencies that apply to you are based on your role in the BHSF organization.</p> <p>Include comments for selected competencies to help you during your discussion with your leader. Finally, select development activities to support your identified competencies.</p>

Submit

IDP Draft → Leader Evaluation → Face-to-Face Feedback → Completed

Collapse All Sections

Employee Information

Employee Name: Leader:
 Position Title: Organization:
 Date Appointed: Review Period:

Next Section

Overview

Instructions:
 An Individual Development Plan (IDP) is a tool to assist leaders in career and personal development. Creating and maintaining your IDP is a critical first step in taking ownership over your career. You and your leader will assess your level of proficiency for the leadership competencies for your level. You may use the Baptist Health Leadership Competency Assessment Tool to evaluate your competencies if you desire.

Next Section

Competencies

Add Additional Competencies Remove Additional Competencies

Instructions:

- Review the list of competencies and their behaviors and identify two competencies that you would like to improve
- The competencies included are the 10 core leadership competencies as well as competencies for your leadership level.
- You may add additional competencies if you like.
- Include comments for selected competencies to improve to help you during your discussion with your leader.
- Select development activities to support your identified competencies.

Step	Action
3.	Scroll down the page.

Competencies

Collapse All Entries In This Group

SELF-DEVELOPMENT

Description:
Is personally committed to and actively works to continuously improve.

Behaviors:

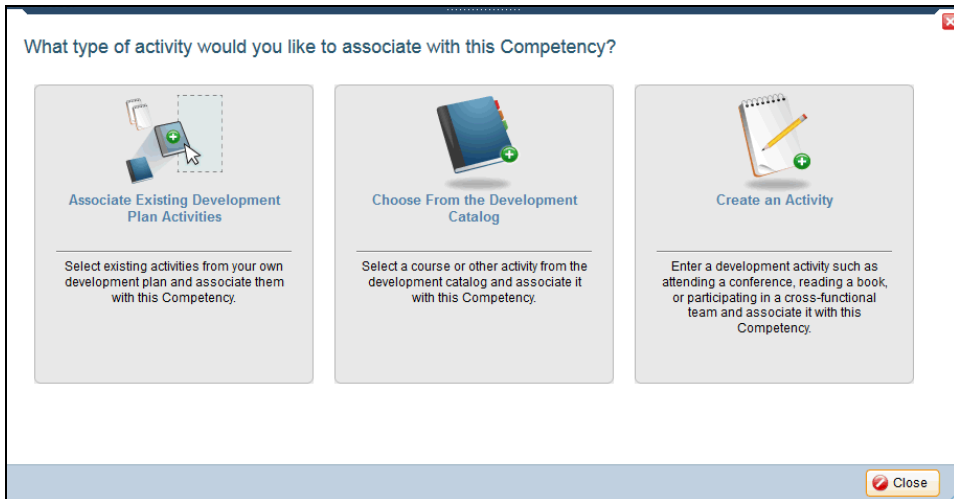
- Asks questions in order to learn.
- Identifies areas to improve and asks for training in those areas.
- Regularly uses training and development classes to learn and build new skills.
- Shows the initiative and motivation for gaining greater expertise in his/her area.
- Strives to learn new skills and apply them on the job.
- Takes on new challenges and roles.

Comments:

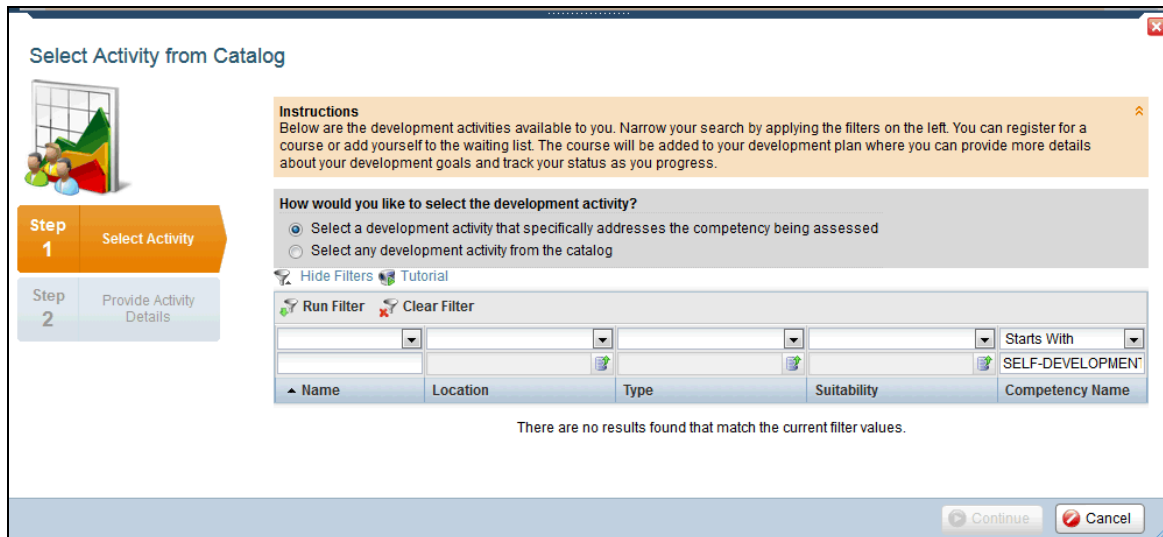
Development Activities:

Next Item

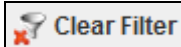
Step	Action
4.	Click the Development Activities button to add an activity to this competency.




Step	Action
5.	You have three types of activities you can associate with this competency. You can associate an existing activity, choose an activity from the catalog, or create a new activity.
6.	Click the appropriate Activity link.



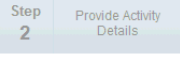
Step	Action
7.	Use this page to search the catalog for the appropriate development activity.
8.	In this example, there are no search results with the current filter. Click the Clear Filter button.



Select Activity from Catalog



Step 1 Select Activity



Step 2 Provide Activity Details

Instructions
Below are the development activities available to you. Narrow your search by applying the filters on the left. You can register for a course or add yourself to the waiting list. The course will be added to your development plan where you can provide more details about your development goals and track your status as you progress.

How would you like to select the development activity?

Select a development activity that specifically addresses the competency being assessed


Select any development activity from the catalog

[Hide Filters](#) [Tutorial](#)

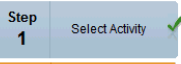
[Run Filter](#) [Clear Filter](#)

Name	Location	Type	Suitability	Competency Name
Communication Skills Training	Waltham	Project	All Managers	
Finance and Strategic Business Skills	Waltham	Classroom	All Managers	
Interview a skilled team member. Ask this person what he or she does to effectively contribute to the team. Ask for specific examples.				
Leadership Course for New Managers	Waltham	Classroom	Entry Level Supervisors	
Network with your colleagues		Experience		
Observe others who are skilled in this competency.				
Project Management Training	Bangalore	Experience	Senior Management	
SkillSoft: Building Improved Work Relationships				
SkillSoft: The Value of Peer Relationships	Austin	Self Study		
Take advantage of each person's unique strengths and learn from them.				


[Continue](#) [Cancel](#)

Step	Action
9.	Click the appropriate activity Name .
10.	Click the Continue button. 

Provide Development Activity Details



Step 1 Select Activity



Step 2 Provide Activity Details

Instructions
Enter the development activity details and click Save. The activity will be added to your development plan where you can update your notes and track your status as you progress.

Activity Name: Leadership Course for New Managers

Description: 5-day training for new managers - includes time and information management, employee coaching and development, project management, critical thinking and problem solving skills.

Development Goals:

Status:

Priority:

Start Date: *

(MM/dd/yyyy)

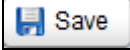
Completed Date:

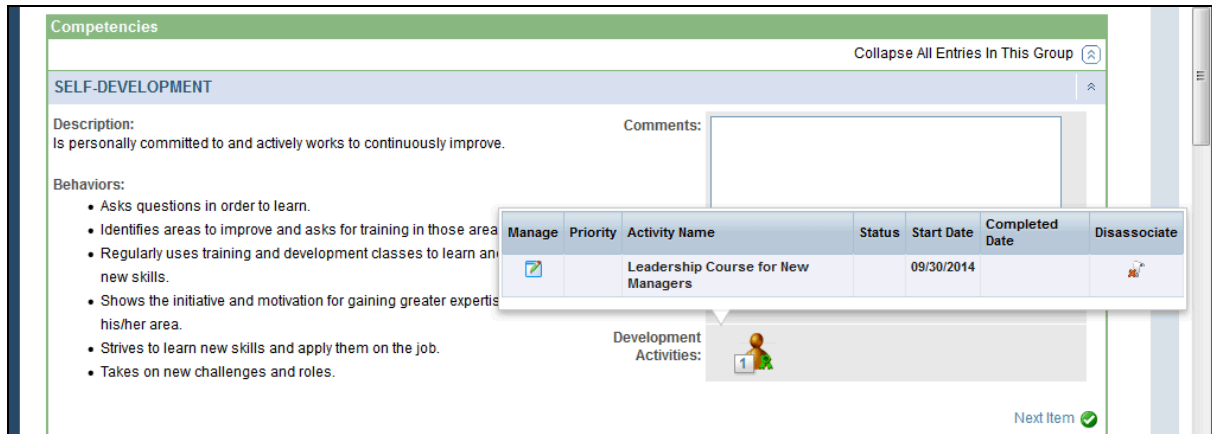
(MM/dd/yyyy)

Score:

External URL:

[Spell Check](#) [Previous](#) [Save](#) [Cancel](#)

Step	Action
11.	Use this page to provide details about the development activity. This activity will be added to your development plan where you can update your notes and track your status as you progress.
12.	Enter the desired information into the Start Date field.
13.	Click the Save button. 

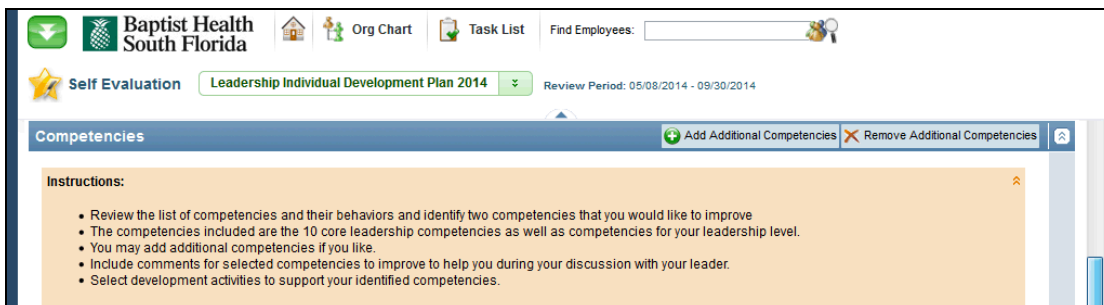


The screenshot shows a web interface for 'Competencies'. Under the 'SELF-DEVELOPMENT' section, there is a description: 'Is personally committed to and actively works to continuously improve.' and a list of behaviors. A table of development activities is overlaid on the page:

Manage	Priority	Activity Name	Status	Start Date	Completed Date	Disassociate
		Leadership Course for New Managers		09/30/2014		

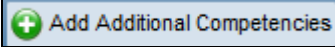
Below the table, there is a 'Development Activities' section with a user icon and a '1' in a box, indicating one activity is associated with this competency. A 'Next Item' button is visible at the bottom right.

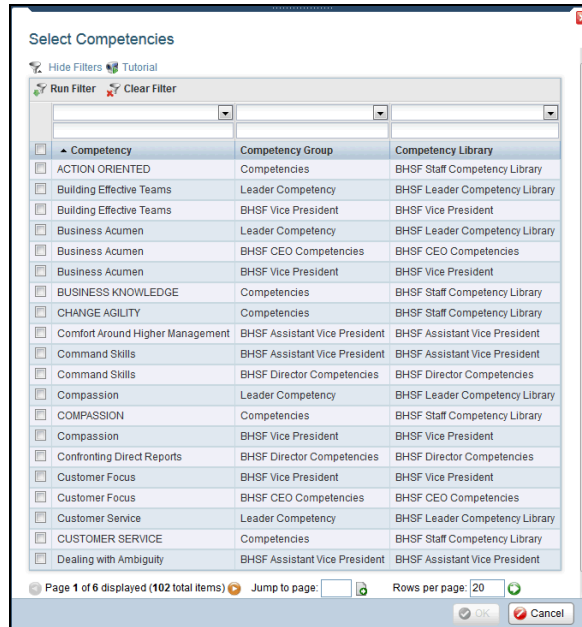
Step	Action
14.	Notice, the Development Activities icon now shows the number one, meaning there is one development activity associated with this competency. Hover over the icon to see more details regarding the activity.
15.	Hover over the Development Activities button.
16.	Scroll down the page.


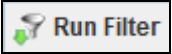


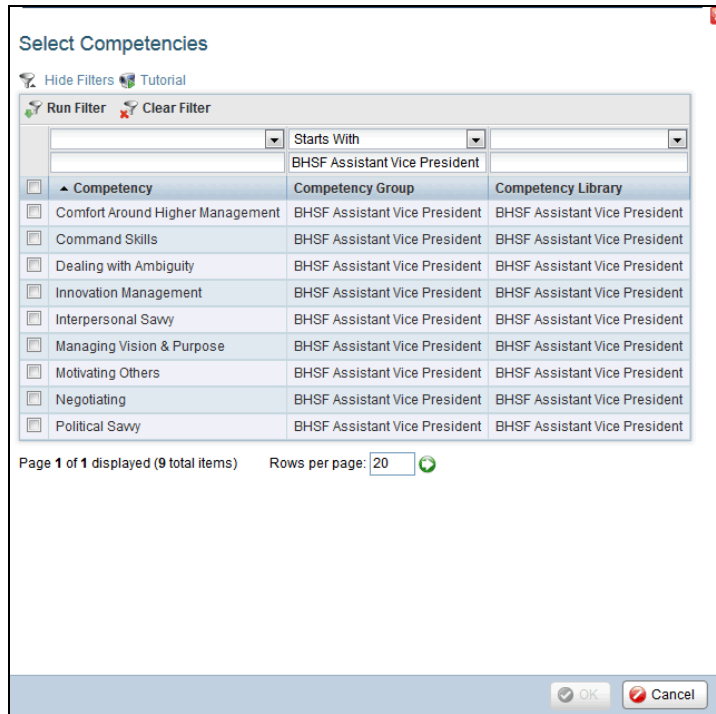
The screenshot shows the 'Self Evaluation' page for 'Leadership Individual Development Plan 2014'. The review period is 05/08/2014 - 09/30/2014. Under the 'Competencies' section, there are instructions for the user:

- Review the list of competencies and their behaviors and identify two competencies that you would like to improve
- The competencies included are the 10 core leadership competencies as well as competencies for your leadership level.
- You may add additional competencies if you like.
- Include comments for selected competencies to improve to help you during your discussion with your leader.
- Select development activities to support your identified competencies.

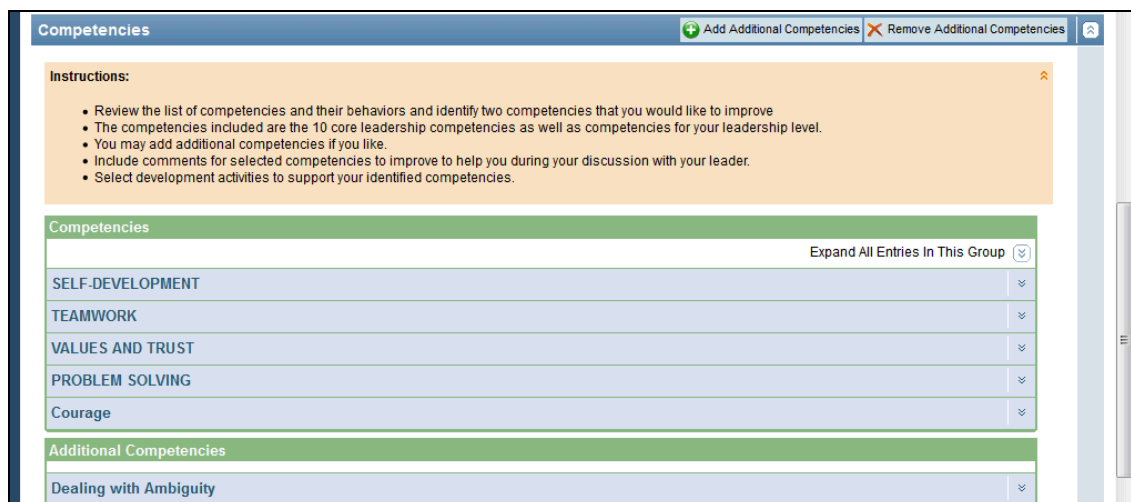
Step	Action
17.	<p>You can add additional competencies not listed here.</p> <p>Click the Add Additional Competencies button.</p> 



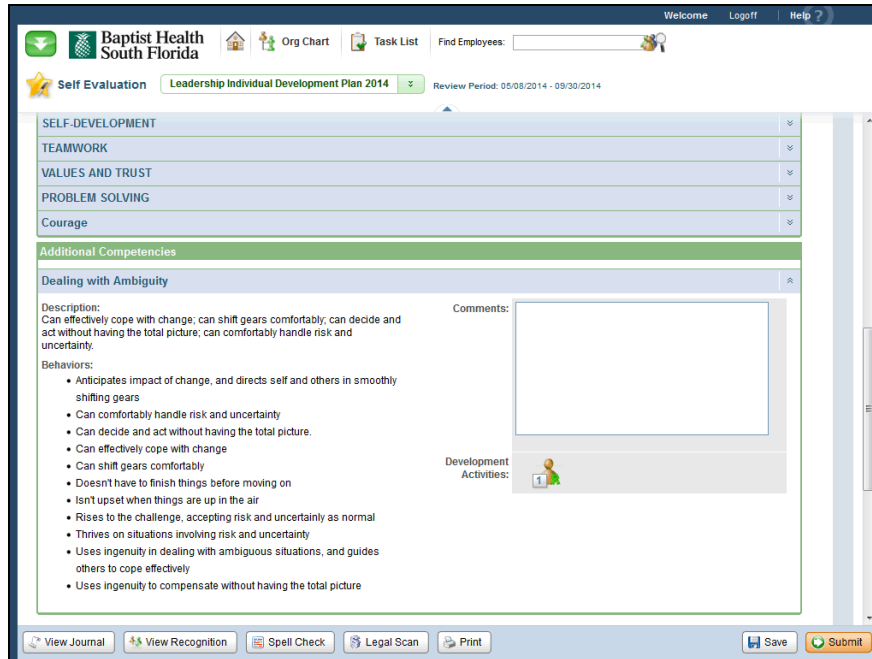
Step	Action
18.	<p>Click the button to the right of the Filter field.</p> 
19.	Click the appropriate Filter list item.
20.	Enter the desired information into the Competency Group field.
21.	<p>Click the Run Filter button.</p> 

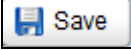



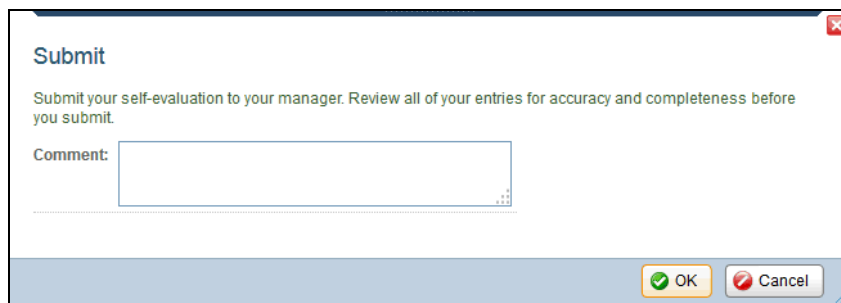
Step	Action
22.	To add a competency, click the radio button to the left of the appropriate Competency name. <input type="checkbox"/>
23.	Click the OK button. <input type="button" value="OK"/>

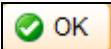





Step	Action
24.	Notice, under Additional Competencies, you can view the competency you added.
25.	Scroll down the page.



Step	Action
26.	Click the Save button. 
27.	Once you have finished adding comments and development activities, click the Submit button. 



Step	Action
28.	Click the OK button. 


Baptist Health South Florida
 Org Chart
 Task List
Find Employees:
Welcome | Logoff | Help ?

★ **Self Evaluation**
Leadership Individual Development Plan 2014
Review Period: 05/08/2014 - 09/30/2014


IDP Draft ✓
Leader Evaluation
Face-to-Face Feedback
Completed

Collapse All Sections

Employee Information

Employee Name: Charlie Young	Leader: Joshua Lyman
Position Title: HRIS Analyst 2	Organization: HR - Information Systems
Date Appointed: 06/04/2012	Review Period: 05/08/2014 - 09/30/2014

Next Section ✓

Step	Action
29.	Notice, you can view the progress of your IDP in the top left corner. Now that you have submitted a draft of your IDP, it will be reviewed by your leader.
30.	Click the Home button. 
31.	Congratulations. You have managed your Individual Development Plan. End of Procedure.

Reviewing and Completing an Individual Development Plan

Purpose: Use this transaction to review and complete your Individual Development Plan.

The screenshot displays a user's profile and development plan interface. The 'About Me' section shows the user's position as 'Admin Assistant 3' and their department as 'HR - BH Site'. Below this are navigation tabs for Profile, Journal, Goals / IDP, Performance, and Recognition. The 'My Tasks' section contains a task: 'Conduct a face to face conversation with Charlie Young for 2014 Individual Development Plan'. The 'My Development Activities' section features a table with columns for Actions, Priority, Activity Name, Associations, Status, and Start Date. The table lists three activities: 'Management Training for the Global Workforce' (Start Date: 09/30/2014), 'TEST ACTIVITY' (Start Date: 09/30/2014, with 1 association), and 'Business Analysis Training' (Start Date: 09/24/2014). An 'Add' button and a 'View All Activities' link are also present. The 'My Company' section shows a list of employees, including Donna Moss (AVP HR) and Charlie Young (Admin Assistant 3).

Step	Action
1.	At this point in the Individual Development Plan process, your leader has reviewed and possibly added comments, competencies, or activities. The next step is to have a face to face conversation with your manager to discuss your IDP before finalizing it.
2.	Click the Conduct a face to face conversation with Charlie Young for 2014 Individual Development Plan link.

The screenshot shows a progress bar at the top with four stages: 'IDP Draft' (checked), 'Leader Evaluation' (checked), 'Face-to-Face Feedback' (active), and 'Completed'. Below the progress bar is the 'Employee Information' section, which includes fields for Employee Name (Charlie Young), Position Title (HRIS Analyst 2), Date Appointed (06/04/2012), Leader (Joshua Lyman), Organization (HR - Information Systems), and Review Period (05/08/2014 - 09/30/2014). The 'Overview' section contains instructions: 'During this step of the process, you and your leader will review how each of you assessed the competencies. Your goal will be to identify 1 – 2 competencies to begin working on as part of your IDP'. A 'Next Section' button is visible at the bottom right.


Step	Action
3.	Scroll down the page.

SELF-DEVELOPMENT

Description:
Is personally committed to and actively works to continuously improve.


Behaviors:


- Asks questions in order to learn.
- Identifies areas to improve and asks for training in those areas.
- Regularly uses training and development classes to learn and build new skills.
- Shows the initiative and motivation for gaining greater expertise in his/her area.
- Strives to learn new skills and apply them on the job.
- Takes on new challenges and roles.

Employee's Comments: 

Enter comments from conversation here.

Leader's Comments: Enter comment for employee here.

Development Activities: 

Next Item 

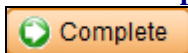
TEAMWORK

Description:
Works in a proactive and collaborative way with others and can be counted on when needed.

Behaviors:

- Asks for help when faced with a new or difficult task; then successfully completes the task.
- Asks others "how are you doing?" and "do you need anything?"

View Journal | View Recognition | Spell Check | Legal Scan | Print | Save | Complete

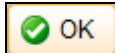
Step	Action
4.	You can view your leader's comments in the Leader's Comments field.
5.	Click in the Employee's Comments field.
6.	Enter comments from your conversation into the Employee's Comments field.
7.	Click the Complete button. 


Complete

Clicking Complete will move this employee to the next step in the evaluation process.

Comment:

OK Cancel

Step	Action
8.	Click the OK button to complete your IDP. 


Welcome
Logoff
Help ?

Org Chart
Task List
Find Employees:

Evaluation Review
Leadership Individual Development Plan 2014
Review Period: 05/08/2014 - 09/30/2014


IDP Draft ✓
Leader Evaluation ✓
Face-to-Face Feedback ✓
Completed ✓

Collapse All Sections

Employee Information

Employee Name: Charlie Young	Leader: Joshua Lyman
Position Title: HRIS Analyst 2	Organization: HR - Information Systems
Date Appointed: 06/04/2012	Review Period: 05/08/2014 - 09/30/2014

Next Section ✓

Step	Action
9.	Click the Home button. 

About Me

My Position: Admin Assistant 3
My Department: HR - BH Site

Profile
Journal
Goals / IDP
Performance
Recognition

My Company

- Donna Moss - AVP HR
- Susan Glindmeyer - Dir Empl Comm/Org Effect
- Abby Bartlett - Dir Human Resources
- Leo McGarry - Dir Human Resources
- Claudia Cregg - Dir HR - ON SITE BHM
- Toby Ziegler - Dir HR - Corporate
- Charlie Young - Admin Assistant 3

My Tasks

No Tasks

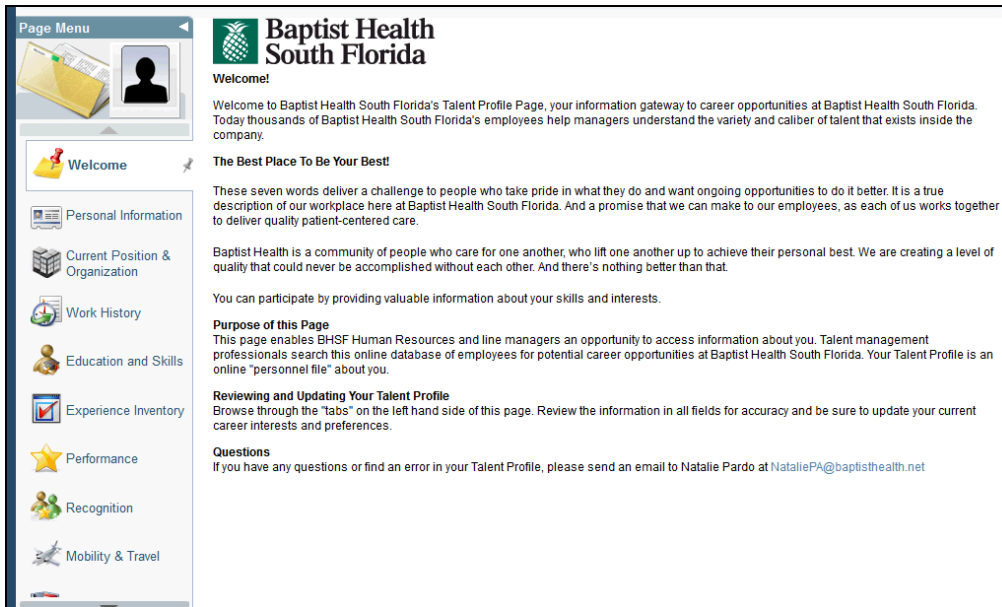
My Development Activities


Show Filters Tutorial

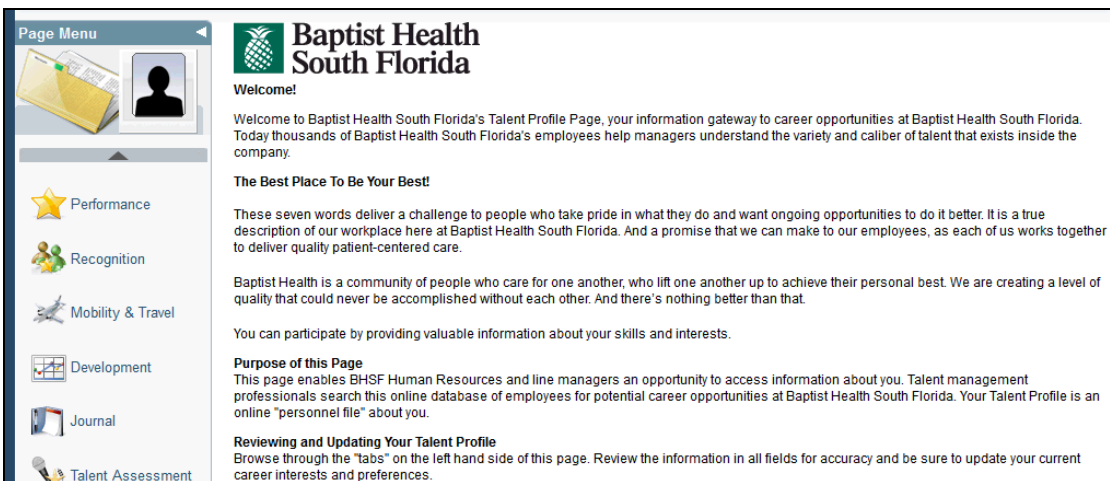
Actions	Priority	Activity Name	Associations	Status	Start Date
		Management Training for the Global Workforce			09/30/2014
		TEST ACTIVITY	1		09/30/2014
		Business Analysis Training			09/24/2014

View All Activities

Step	Action
10.	Now that you have completed your IDP, you can begin your development activities identified in the IDP. Next, you will select an activity and edit the activity details.
11.	Click the Profile tab.



Step	Action
12.	Click the Down Arrow button. 



Step	Action
13.	Click the Development link.

Competency Gap

Current Development Activities

This section provides a comprehensive view of your current development plan. Any development activities you have added to your plan and/or associated to your career aspirations, performance goals, competency evaluations, etc. will appear here for tracking and follow-up. Click the icon to the left of each activity to edit the details or see additional options specific to that activity's status. Note: If you are not seeing updates reflected, click the refresh button on your browser.

Current Development Activities- Summary_NP

Select View Show Filters Set Columns Save View Reports Charts Tutorial

Actions	Activity Name	Description	Type	Associations	Status	Priority	Development Goals	Start Date	Completed Date	De
	TEST ACTIVITY	Enter your description here.		1				09/30/2014		
	Leadership Course for New Managers	5-day training for new managers - includes time More...	Classroom	1				09/30/2014		
	Management Training for the Global Workforce	3-day seminar for the Global Workforce - includes More...	Classroom					09/30/2014		

Step	Action
14.	Click the Edit Details button to the left of the appropriate activity.

Edit Development Activity

Instructions
Edit the development activity details and click Save. The updates will be reflected on your development plan.

Activity Name: Management Training for the Global Workforce

Description: 3-day seminar for the Global Workforce - includes leadership skills, communication skills, time management and personal performance skills.

Development Goals:

Status:

Priority:

Start Date: 09/30/2014 31 *

(MM/dd/yyyy)

Completed Date: 31


(MM/dd/yyyy)

Score:

External URL:

Spell Check Save Cancel

Step	Action
15.	Click the button to the right of the Status field.

Step	Action
16.	Click the appropriate Status list item.
17.	Click the Save button. 

Competency Gap

Current Development Activities

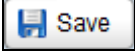
This section provides a comprehensive view of your current development plan. Any development activities you have added to your plan and/or associated to your career aspirations, performance goals, competency evaluations, etc. will appear here for tracking and follow-up. Click the icon to the left of each activity to edit the details or see additional options specific to that activity's status. Note: If you are not seeing updates reflected, please click the refresh button on your browser.

Current Development Activities- Summary_NP

Select View Show Filters Set Columns Save View Reports Charts Tutorial

Actions	Activity Name	Description	Type	Associations	Status	Priority	Development Goals	Start Date	Completed Date	De
	TEST ACTIVITY	Enter your description here.		1				09/30/2014		
	Leadership Course for New Managers	5-day training for new managers - includes time More...	Classroom	1				09/30/2014		
	Management Training for the Global Workforce	3-day seminar for the Global Workforce - includes More...	Classroom		In-Progress			09/30/2014		
	Business Analysis Training	2-day seminar on business analysis and developing More...	Classroom					09/24/2014		

Save Spell Check Print Statements

Step	Action
18.	Click the Save button. 
19.	Congratulations. You have reviewed and completed your Individual Development Plan. End of Procedure.

Managing Learning

Viewing My Learning

Navigation: Main Menu > ELM > Self Service > Learning > My Learning

Purpose: Use this transaction to learn the basic sections of the My Learning page.

My Learning

You can view five of your most current activities and programs or select the View All Learning link to view all of your activities and programs. You can search for learning using a keyword search or access the advanced search or browse catalog by selecting the corresponding link. To view your scheduled activities, select the View Calendar link. Submit a learning request by selecting the Request New Learning link.

Search Learning Catalog

Select Search Category: [Activities](#) | [Catalog Items](#) | [Programs](#) | [All](#)

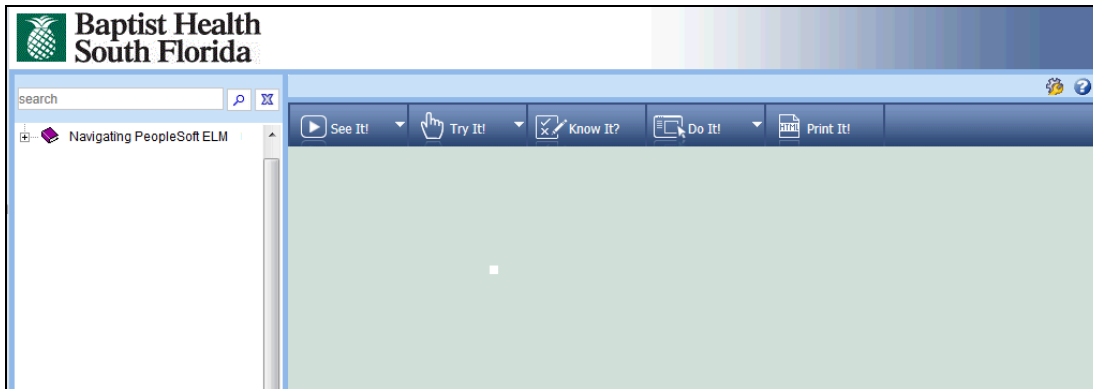
Search the Catalog:

[Advanced Search](#) [Browse Catalog](#) [Request New Learning](#)

My Learning Activities						Personalize 1-3 of 3
Title	Type	Status	Date	Action	Launch	
"ECA-Mod 33: Toxicologic Emergencies, Poisoning"	Online	<input checked="" type="checkbox"/> In-Progress	10/30/2014	<input type="button" value="Drop"/>	<input type="button" value="Launch"/>	
AACN Pharma: Blood & Blood Prod	Online	<input checked="" type="checkbox"/> In-Progress	10/30/2014		<input type="button" value="Launch"/>	
Self-Care Selfish or Selfless	Live	<input checked="" type="checkbox"/> Enrolled	10/29/2014			
Navigating PeopleSoft ELM	ARE 2010 Ver 1	<input checked="" type="checkbox"/> In-Progress	10/22/2014	<input type="button" value="Drop"/>	<input type="button" value="Launch"/>	

[All My Learning](#) [View Calendar](#)

Step	Action
1.	This transaction will be a very brief exploration of the My Learning page. Additional transactions will provide instruction on how to drop a course, search the catalog, browse the catalog, and enroll in an activity beginning on this page.
2.	To search the Learning Catalog, select a search category and enter your search terms.
3.	The My Learning Activities section displays your five most recent activities.
4.	Click the Launch button to launch the desired learning activity. <div style="border: 1px solid #ccc; display: inline-block; padding: 2px 5px; margin-top: 5px;">Launch</div>



Step	Action
5.	The learning activity you launched appears, as shown, in a separate window.
6.	When you complete the lesson, the window will close and you are returned to the My Learning page.

My Learning

You can view five of your most current activities and programs or select the [View All Learning](#) link to view all of your activities and programs. You can search for learning using a keyword search or access the advanced search or browse catalog by selecting the corresponding link. To view your scheduled activities, select the [View Calendar](#) link. Submit a learning request by selecting the [Request New Learning](#) link.

Search Learning Catalog

Select Search Category: [Activities](#) | [Catalog Items](#) | [Programs](#) | [All](#)

Search the Catalog: [Search Activities](#)

[Advanced Search](#) [Browse Catalog](#) [Request New Learning](#)

My Learning Activities					Personalize	1-3 of 3
Title	Type	Status	Date	Action	Launch	
"ECA-Mod 33: Toxicologic Emergencies, Poisoning"	Online	<input checked="" type="checkbox"/> In-Progress	10/30/2014	Drop	Launch	
AACN Pharma: Blood & Blood Prod	Online	<input checked="" type="checkbox"/> In-Progress	10/30/2014		Launch	
Self-Care Selfish or Selfless	Live	<input checked="" type="checkbox"/> Enrolled	10/29/2014			
Navigating PeopleSoft ELM	ARE 2010 Ver 1	<input checked="" type="checkbox"/> In-Progress	10/22/2014	Drop	Launch	

[All My Learning](#) [View Calendar](#)

Step	Action
7.	Click the Title of an activity to view details of the activity. In this example, you will view the details of a live activity, including the activity schedule, location, date and time.
8.	Click the appropriate Activity Title link.

Activity Progress

Self-Care Selfish or Selfless

Zamarit Futernick, Supv Radio, Radiology - Diagnostic

You can view the Schedule, Grades and Attendance, Notes and Attachments, Payment Details and Approvals associated with the Activity by selecting the corresponding links. You can view the Activity Details by selecting the Activity Name and view the progress of a Learning Component by selecting the corresponding Learning Component Name.

Activity Name:	Self-Care Selfish or Selfless	Type:	Live
Activity Code:	HRLM-HCP-HLC-00001-L-210111A	Contact:	--
Price Per Seat:	0.00 USD	Drop Charge:	0.00 USD
Enrollment Status:	Enrolled	Confirmation Number:	1357
Start Date:	01/21/2011	End Date:	10/01/2019
Last Enrollment Date:	--	Last Drop Date:	--
		Duration:	1 Hrs

Progress [Schedule](#) [Grades and Attendance](#) [Notes and Attachments](#) [Payment Details](#) [Approvals](#)

Activity Progress Summary

Progress:	Enrolled	Grade:	Not Graded
Passing Status:	Pending	Comments:	

Instructor: Carmen Goins

Activity Syllabus

You must complete this activity by 10/29/2015.
To receive credit for this activity you must complete all required tasks in order.

1 [Self-Care Selfish or Selfless](#) [View Schedule and Locations](#)

Required Sessions

Progress: Not Attempted (Duration : 1 Hrs)

Step	Action
9.	On this page, you can view the activity schedule, grades and attendance, notes and attachments, payment details, and any approvals associated with the activity by clicking the appropriate links.
10.	Click the View Schedule and Locations link to view the dates, times, and locations this activity is offered. View Schedule and Locations

Activity Progress

Self-Care Selfish or Selfless

Zamarit Futernick, Supv Radio, Radiology - Diagnostic

You can view the Schedule, Grades and Attendance, Notes and Attachments, Payment Details and Approvals associated with the Activity by selecting the corresponding links. You can view the Activity Details by selecting the Activity Name and view the progress of a Learning Component by selecting the corresponding Learning Component Name.

Activity Name:	Self-Care Selfish or Selfless	Type:	Live
Activity Code:	HRLM-HCP-HLC-00001-L-210111A	Contact:	--
Price Per Seat:	0.00 USD	Drop Charge:	0.00 USD
Enrollment Status:	Enrolled	Confirmation Number:	1357
Start Date:	01/21/2011	End Date:	10/01/2019
Last Enrollment Date:	--	Last Drop Date:	--
		Duration:	1 Hrs

[Progress](#) [Schedule](#) [Grades and Attendance](#) [Notes and Attachments](#) [Payment Details](#) [Approvals](#)

Step	Action
11.	Scroll down the page.

Progress	Schedule	Grades and Attendance	Notes and Attachments	Payment Details	Approvals
--------------------------	--------------------------	---------------------------------------	---------------------------------------	---------------------------------	---------------------------

Scheduled Sessions					
Day	Date	Start Time	End Time	Time Zone	Location
Monday *	11/03/2014	1:00PM	5:00PM	EST	Details
Wednesday *	11/05/2014	1:00PM	5:00PM	EST	Details
Monday *	11/10/2014	1:00PM	5:00PM	EST	Details
Wednesday *	11/12/2014	1:00PM	5:00PM	EST	Details
Monday *	11/17/2014	1:00PM	5:00PM	EST	Details
Wednesday *	11/19/2014	1:00PM	5:00PM	EST	Details
Monday *	11/24/2014	1:00PM	5:00PM	EST	Details
Wednesday *	11/26/2014	1:00PM	5:00PM	EST	Details

Step	Action
12.	To view location details about a specific session, click the Details link. Details

Room Details

[Self-Care Selfish or Selfless](#)

Session Facility Detail

Facility Details

Facility:

Room Name:

Room Number:

Building Name:

Floor Number: Maximum Occupancy:

Address:

Attachments

[View Attachment](#)

Accommodations

Description

[Return to Previous Page](#)

Step	Action
13.	Use the Session Facility Detail page to view the location of live training for the selected session.
14.	Click the Return to Previous Page link. Return to Previous Page

Monday *	12/08/2014	1:00PM	5:00PM	EST	Details
Wednesday *	12/10/2014	1:00PM	5:00PM	EST	Details
Monday *	12/15/2014	1:00PM	5:00PM	EST	Details
Wednesday *	12/17/2014	1:00PM	5:00PM	EST	Details

* Required Sessions

[Return to Previous Page](#)

i To be able to add event to your calendar, set up your calendar in the Learning Preference page.

Step	Action
15.	Click the Return to Previous Page link. Return to Previous Page
16.	Congratulations. You have reviewed the My Learning page. End of Procedure.

Browsing the Learning Catalog

Navigation: Main Menu > ELM > Self Service > Learning > Browse Catalog

Purpose: Use this transaction to practice browsing the learning catalog and viewing the categories associated with your learning environment's primary category.

Browse Catalog

Select a category to view the associated related categories, programs, and catalog items.

Categories

[Credits](#)
Courses for continuing education credits

[Entities](#)
Entities

[Healthcare Professionals](#)
Learning for healthcare professionals

[Leadership](#)
Leadership

[Non-Healthcare Professionals](#)
Non-Healthcare Professionals

[Search Catalog](#)

Step	Action
1.	Use the Browse Catalog page to view the categories that are associated with the BHSF learning environment.
2.	When you first access the catalog in browse mode, the system displays a list of categories of the BHSF learning environment. You will only see those categories that are associated with a learner group to which you belong.
3.	Clicking a category displays the category's subcategories, programs, and activities available to your learning group. Click the appropriate Category link.

Browse Catalog

Browse and view the learning under your selected category. Select the name of the Learning to view details. You can register for a Program by selecting the 'Register' hyperlink. You can view the activities for a Catalog Item and enroll by selecting the 'Select' hyperlink.

[Learning Catalog](#)>>Non-Healthcare Professionals

Non-Healthcare Professionals

Related Categories [Previous](#) [Next](#)

[Administrative Professionals](#)
Administrative Professionals

[Administrators](#)
Administrators

[Annual Required Education](#)
Annual Required Education

[Learning Catalog](#)>>Non-Healthcare Professionals

[Search Catalog](#) [Request New Learning](#)

Step	Action
4.	The Related Categories are displayed. Click the Next link to display additional subcategories. Next

Browse Catalog

Browse and view the learning under your selected category. Select the name of the Learning to view details. You can register for a Program by selecting the 'Register' hyperlink. You can view the activities for a Catalog Item and enroll by selecting the 'Select' hyperlink.

[Learning Catalog](#)>>Non-Healthcare Professionals

Non-Healthcare Professionals

Related Categories [Previous](#) [Next](#)

[New Employee](#)
New Employee

[Sales Professionals](#)
Sales Professionals

[Learning Catalog](#)>>Non-Healthcare Professionals

[Search Catalog](#) [Request New Learning](#)

Step	Action
5.	Click the appropriate Related Category link to view additional subcategories and programs. Click the appropriate Related Category link.

Browse Catalog

Browse and view the learning under your selected category. Select the name of the Learning to view details. You can register for a Program by selecting the 'Register' hyperlink. You can view the activities for a Catalog Item and enroll by selecting the 'Select' hyperlink.

[Learning Catalog](#)>>[Non-Healthcare Professionals](#)>>New Employee

New Employee

Catalog Items

[Annual Required Education Auto Enrollment: \(ARE AE CI\)](#) [Select](#)

Annual Required Educaion Auto Enrollment CI

[Learning Catalog](#)>>[Non-Healthcare Professionals](#)>>New Employee

[Search Catalog](#) [Request New Learning](#)

Step	Action
6.	Use the course title link to navigate to a detailed course description page. Click the appropriate Course Title link.

Annual Required Education Auto Enrollment:

Description:
Annual Required Educaion Auto Enrollment CI

The table below shows the different delivery options and start dates for the Catalog Item. You can view the complete activity details by clicking the View Details link. You can enroll in the activity by clicking the Enroll button or bookmark the activity to view later in your Planned Learning page by clicking the Add to Plan button.

Please note that activities without a specified Start Date can be taken at any time.

Activity Options for Annual Required Education Auto Enrollment:						
Activity Code	Type	Start Date	Price			Add to Plan
ARE_AE_ONLINE_ACT	Online	04/22/2014	0.00 USD	View Details	<input type="button" value="Enroll"/>	<input type="button" value="Add to Plan"/>
ARE_AE_ACT	Live	05/07/2014	0.00 USD	View Details	<input type="button" value="Enroll"/>	
Elsevier - Connect01	Live	06/19/2014	0.00 USD	View Details	<input type="button" value="Enroll"/>	
Baisc_&_Navigation_Course	Online	07/03/2014	0.00 USD	View Details	<input type="button" value="Enroll"/>	<input type="button" value="Add to Plan"/>
CX - TEST	Online	07/17/2014	0.00 USD	View Details	<input type="button" value="Enroll"/>	<input type="button" value="Add to Plan"/>

 [Return to Previous Page](#)

Step	Action
7.	Use the selected course page to review the course description and scheduling options, enroll in the course, or add the course to your learning plan.

Step	Action
8.	To view additional details about an activity, click the View Details link to the right of the appropriate activity. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">View Details</div>

Annual Required Education Auto Enrollment:

You can view further details about the Activity by selecting the various links. You can enroll in the activity by selecting the Enroll button or add the activity to your Learning Plan by selecting the Add to Plan button.

Activity Name:	Annual Required Education Auto Enrollment	Type:	Online
Activity Code:	ARE_AE_ONLINE_ACT	Contact:	Trudy-Ann Armand
Price Per Seat:	0.00 USD	Drop Charge:	0.00 USD
Enrollment Status:	In-Progress	Confirmation Number:	19955
Start Date:	04/22/2014	End Date:	--
Last Enrollment Date:	--	Last Drop Date:	--
		Duration:	4 Hrs

Overview [Objectives Met](#) [Schedule](#) [Prerequisites](#) [Notes and Attachments](#)

Description:
Annual Required Eductaion Auto Enrollment CI

Instructor: Trudy-Ann Armand
Activity Syllabus
To receive credit for this activity you must complete all required tasks.

1 Annual Required Eductaion Online Auto Enrollment LC
Required Web-based

Step	Action
9.	Use the activity details page to review a description of the selected activity, objectives met, schedule, prerequisites, and any notes and attachments. You can also enroll or add the activity to your learning plan by using the Enroll and Add to Plan buttons at the bottom of the page.
10.	Congratulations. You have browsed the learning catalog. End of Procedure.

Searching the Learning Catalog

Navigation: Main Menu > ELM > Self Service > Learning > Search Catalog

Purpose: Use this transaction to practice searching the learning catalog.

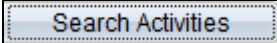
Search Catalog

Basic Search

Select Search Category: [Activities](#) | [Catalog Items](#) | [Programs](#) | [All](#)

Search the Catalog: [Search Activities](#)

[Advanced Search](#) [Browse Catalog](#) [Request New Learning](#) [Search Tips](#) [Preferences](#)

Step	Action
1.	<p>Use the Search Catalog page to search the learning catalog.</p> <p>You can search by activities, catalog items, programs, or all items in the catalog. To search, select the appropriate search category, enter your search criteria, and click the Search Activities button.</p> <p>In this example, you will search Activities.</p>
2.	<p>The system uses the Verity search engine. Click the Search Tips link to access a page with search tips.</p>
3.	<p>Click in the Search the Catalog field.</p>
4.	<p>Enter the desired information into the Search the Catalog field. For example, enter "Corporate".</p>
5.	<p>Click the Search Activities button.</p> 

Search Catalog

Basic Search

Select Search Category: [Activities](#) | [Catalog Items](#) | [Programs](#) | [All](#)

Search the Catalog:

[Advanced Search](#) | [Browse Catalog](#) | [Request New Learning](#) | [Search Tips](#) | [Preferences](#)

Search Results: Previous Next

Results 1 - 1 of 1 for Corporate

[Corporate Compliance BHSF \(CORP_COMP_CJ\)](#) Online [Enroll](#)

Corporate Compliance BHSF - Online learning

This activity Starts on 06/04/2014 at a price of 0.00 USD

Search Results Previous Next

Step	Action
6.	All catalog components associated with the keyword you entered in the Search the Catalog field are displayed in the search results.
7.	Click the Advanced Search link. Advanced Search

Search Catalog

Advanced Search

Type: ▼

Title:

Code:

Description:

Location:

Category: 🔍

Objective:

Instructor:

Language:

Start/End Dates

From Date: 📅 Through Date: 📅

[Basic Search](#) | [Browse Catalog](#) | [Request New Learning](#) | [Search Tips](#) | [Preferences](#)

Step	Action
8.	Use Advanced Search page to filter learning activities and programs using multiple selection criteria.
9.	Click the button to the right of the Type field. <input type="button" value="▼"/>
10.	Click the appropriate Type list item.

11.	<p>To narrow your search results, enter additional criteria.</p> <p>Click the Search button.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Search</div>
-----	---

Search Catalog

To change your search criteria select [Advanced Search](#)

[Basic Search](#) [Browse Catalog](#) [Request New Learning](#) [Search Tips](#) [Preferences](#)

Search Results: [Previous](#) [Next](#)

Results 1 - 10 of 10

Your Search was restricted to **Language : English**

Your Search was restricted to **Type : Online**

[Annual Required Education Auto Enrollment: \(ARE_AE_CI\)](#) [Enroll](#)

Annual Required Educaion Auto Enrollment CI

[Corporate Compliance BHSF \(CORP_COMP_CI\)](#) [Enroll](#)

Corporate Compliance BHSF - Online learning

[Demotion Auto Enrollment: \(DEM_AE_CI\)](#) [Enroll](#)

Demotion Auto Enrollment CI

Step	Action
12.	Notice, the system displays your search criteria and the number of results returned that meet your criteria.
13.	Click the appropriate Activity link. Promotion Auto Enrollment: (DEM_AE_CI)

Promotion Auto Enrollment:

Description:
Demotion Auto Enrollment CI

The table below shows the different delivery options and start dates for the Catalog Item. You can view the complete activity details by clicking the View Details link. You can enroll in the activity by clicking the Enroll button or bookmark the activity to view later in your Planned Learning page by clicking the Add to Plan button.

Please note that activities without a specified Start Date can be taken at any time.

Activity Options for Demotion Auto Enrollment:						
Activity Code	Type	Start Date	Price			Add to Plan
PRO_AE_ONLINE_ACT	Online	05/13/2014	0.00 USD	View Details	<input type="button" value="Enroll"/>	<input type="button" value="Add to Plan"/>

[Return to Previous Page](#)

Step	Action
14.	Use the course title page to review the selected course description, scheduling options, enroll in the course, or add the course to your learning plan.
15.	Congratulations. You have searched the learning catalog. End of Procedure.

Enrolling in an Activity

Navigation: Main Menu > ELM > Self Service > Learning > Browse Catalog

Purpose: Use this transaction to learn how to enroll in an activity.

Browse Catalog

Select a category to view the associated related categories, programs, and catalog items.

Categories

[Credits](#)
Courses for continuing education credits

[Entities](#)
Entities

[Healthcare Professionals](#)
Learning for healthcare professionals

[Leadership](#)
Leadership

[Non-Healthcare Professionals](#)
Non-Healthcare Professionals

[Search Catalog](#)

Step	Action
1.	You can find and enroll in a learning activity by browsing or searching the learning catalog. In this example, you will browse the catalog.
2.	Use the Browse Catalog page to view the categories that are associated with the BHSF learning environment's primary category. When accessing the catalog in browse mode, the system displays the list of categories in your learner group.
3.	Clicking a category displays the category's subcategories, programs, and activities. Click the appropriate Category link.

Browse Catalog

Browse and view the learning under your selected category. Select the name of the Learning to view details. You can register for a Program by selecting the 'Register' hyperlink. You can view the activities for a Catalog Item and enroll by selecting the 'Select' hyperlink.

[Learning Catalog](#)>>Non-Healthcare Professionals

Non-Healthcare Professionals

Related Categories Previous [Next](#)

[Administrative Professionals](#)
Administrative Professionals

[Administrators](#)
Administrators

[Annual Required Education](#)
Annual Required Education

[Learning Catalog](#)>>Non-Healthcare Professionals

[Search Catalog](#) [Request New Learning](#)

Step	Action
4.	<p>The Related Categories are displayed.</p> <p>Click the Next link to display additional subcategories.</p> <p>Next</p>

Browse Catalog

Browse and view the learning under your selected category. Select the name of the Learning to view details. You can register for a Program by selecting the 'Register' hyperlink. You can view the activities for a Catalog Item and enroll by selecting the 'Select' hyperlink.

[Learning Catalog](#)>>Non-Healthcare Professionals

Non-Healthcare Professionals

Related Categories [Previous](#) Next

[New Employee](#)
New Employee

[Sales Professionals](#)
Sales Professionals

[Learning Catalog](#)>>Non-Healthcare Professionals

[Search Catalog](#) [Request New Learning](#)

Step	Action
5.	<p>Click the appropriate Related Category link to view additional subcategories and programs.</p> <p>Click the appropriate Related Category link.</p>

Browse Catalog

Browse and view the learning under your selected category. Select the name of the Learning to view details. You can register for a Program by selecting the 'Register' hyperlink. You can view the activities for a Catalog Item and enroll by selecting the 'Select' hyperlink.

[Learning Catalog](#)>>[Non-Healthcare Professionals](#)>>New Employee

New Employee

Catalog Items

[Annual Required Education Auto Enrollment: \(ARE AE CI\)](#) [Select](#)

Annual Required Educaion Auto Enrollment CI

[Learning Catalog](#)>>[Non-Healthcare Professionals](#)>>New Employee

[Search Catalog](#) [Request New Learning](#)

Step	Action
6.	Use the course title link to navigate to a detailed course description page. Click the appropriate Course Title link.

Annual Required Education Auto Enrollment:

Description:
Annual Required Educaion Auto Enrollment CI

The table below shows the different delivery options and start dates for the Catalog Item. You can view the complete activity details by clicking the View Details link. You can enroll in the activity by clicking the Enroll button or bookmark the activity to view later in your Planned Learning page by clicking the Add to Plan button.

Please note that activities without a specified Start Date can be taken at any time.

Activity Options for Annual Required Education Auto Enrollment:						
Activity Code	Type	Start Date	Price			Add to Plan
ARE_AE_ONLINE_ACT	Online	04/22/2014	0.00 USD	View Details	<input type="button" value="Enroll"/>	<input type="button" value="Add to Plan"/>
ARE_AE_ACT	Live	05/07/2014	0.00 USD	View Details	<input type="button" value="Enroll"/>	
Elsevier - Connect01	Live	06/19/2014	0.00 USD	View Details	<input type="button" value="Enroll"/>	
Baisc_&_Navigation_Course	Online	07/03/2014	0.00 USD	View Details	<input type="button" value="Enroll"/>	<input type="button" value="Add to Plan"/>
CX - TEST	Online	07/17/2014	0.00 USD	View Details	<input type="button" value="Enroll"/>	<input type="button" value="Add to Plan"/>

[Return to Previous Page](#)

Step	Action
7.	Use the selected course page to review the course description and scheduling options, enroll in the course, or add the course to your learning plan.
8.	To view additional details about an activity, click the View Details link to the right of the appropriate activity. View Details

Annual Required Education Auto Enrollment:

You can view further details about the Activity by selecting the various links. You can enroll in the activity by selecting the Enroll button or add the activity to your Learning Plan by selecting the Add to Plan button.

Activity Name:	Annual Required Education Auto Enrollment	Type:	Live
Activity Code:	Elsevier - Connect01	Contact:	Trudy-Ann Armand
Price Per Seat:	0.00 USD	Drop Charge:	0.00 USD
Enrollment Status:	Planned	Confirmation Number:	19958
Start Date:	06/19/2014	End Date:	--
Last Enrollment Date:	--	Last Drop Date:	--

Overview [Objectives Met](#) [Schedule](#) [Prerequisites](#) [Notes and Attachments](#)

Description:
Annual Required Educaiton Auto Enrollment CI

Instructor: Arlene Torres
Activity Syllabus
To receive credit for this activity you must complete all required tasks in order.

- 1 Elsevier - AICC Connect01
Required Web-based

- 2 Elsevier - AICC - Connect01
Required Web-based

Step	Action
9.	Use the activity details page to review all the details for the activity before you enroll.
10.	Click the Enroll button. <input type="button" value="Enroll"/>

[Enroll In Activity](#)

Review Information

Benard Buick Supervisor Building and Maintenance Town and Country

Activity Name:	Annual Required Education Auto Enrollment	Type:	Live
Activity Code:	Elsevier - Connect01	Contact:	Trudy-Ann Armand
Price Per Seat:	0.00 USD	Drop Charge:	0.00 USD
Start Date:	06/19/2014	End Date:	--
Last Enrollment Date:	--	Last Drop Date:	--
Available Seats:	--	Available Waitlist:	0
Language:	English		


 [Search Catalog](#) [Browse Catalog](#)

Step	Action
11.	Click the Submit Enrollment button. <input type="button" value="Submit Enrollment"/>

Enroll In Activity

Enrollment Confirmation

Benard Buick Supervisor Building and Maintenance Town and Country

 You have successfully enrolled in Annual Required Education Auto Enrollment. This change in status will be updated on the All Learning page.

Activity Name:	Annual Required Education Auto Enrollment	Type:	Live
Activity Code:	Elsevier - Connect01	Contact:	Trudy-Ann Armand
Price Per Seat:	0.00 USD	Drop Charge:	0.00 USD
Enrollment Status:	Enrolled	Confirmation Number:	19960
Start Date:	06/19/2014	End Date:	--
Last Enrollment Date:	--	Last Drop Date:	--

[Launch](#)

[Search Catalog](#) [Browse Catalog](#) [My Learning](#) [Request New Learning](#)

Step	Action
12.	Your enrollment has been confirmed. You can verify your enrollment on your My Learning page.
13.	The My Learning page lists the course you have enrolled in as Planned. When you begin the course, the status will change to In Progress.
14.	Congratulations. You have enrolled in an activity. End of Procedure.

Adding Supplemental Learning Activities

Navigation: Main Menu > ELM > Self Service > Learning > Supplemental Learning

Purpose: Use this transaction to practice adding or requesting supplemental learning.


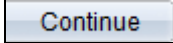
Supplemental Learning

Supplemental Learning is learning that is not listed in the standard learning catalog. To add supplemental learning to your Planned Learning or Learning History, select the appropriate type of learning you want to add and click the Continue button.

Select Supplemental Learning Type

*Type:

* Required Field

Step	Action
1.	Use the Supplemental Learning page to add supplemental learning not listed in the standard catalog to your learning plan.
2.	Click the button to the right of the Type field. 
3.	Click the appropriate Type list item.
4.	Click the Continue button. 

Supplemental Learning

Supplemental Learning Details

*Title:

*Description:

*Status:

Type: ARE 2010 Ver 1

*Start Date:

*End Date:

Institution:

Location:

Study Hours:


Travel Hours:

Currency Code:

Price:

Education Units:

*Provided By:

Step	Action
5.	Use the Supplemental Learning Details area to define the components of the supplemental learning. The fields that appear in this area are enabled or disabled based on the supplemental learning type defined in the previous step.
6.	Enter the desired information into the Title field.
7.	Enter the desired information into the Description field.
8.	Notice, the remaining description text has been entered for you.
9.	Click the button to the right of the Status field. 
10.	Click the appropriate Status list item.
11.	Enter the desired information into the Start Date field.
12.	Enter the desired information into the End Date field.
13.	Enter the desired information into the Institution field.
14.	Enter the desired information into the Location field.
15.	Enter the desired information into the Study Hours field.
16.	Enter the desired information into the Travel Hours field.
17.	Enter the desired information into the Price field.
18.	Enter the desired information into the Education Units field.
19.	Enter the desired information into the Provided By field.
20.	Scroll down the page.



Education Units:

*Provided By:

Supervised By:

Field 1:

Field 2:

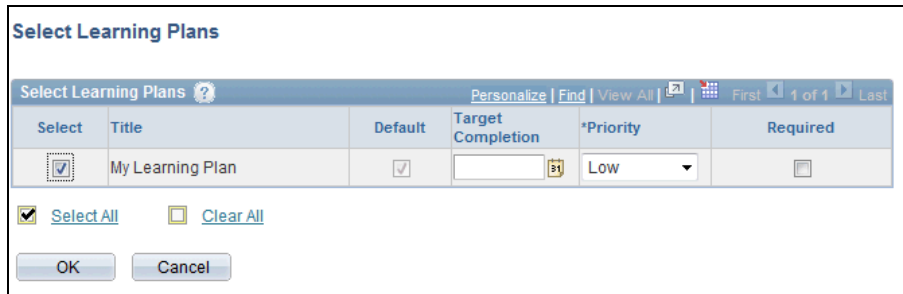
Field 3:

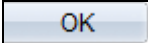
Field 4:

* Required Field

[My Learning](#)

21.	Click the Save button. 
-----	--



Step	Action
22.	Click the OK button. 
23.	<p>Congratulations. You have completed the Request Learning Credit for Supplemental Learning transaction and now you should be able to add or request supplemental learning.</p> <p>End of Procedure.</p>

Setting My Learning Preferences

Navigation: Main Menu > ELM > Self Service > Personal Information > Personal Information Home

Purpose: Use this transaction to practice setting your individual learner preferences in ELM.

Learning Preferences

Select your learning preferences for Catalog Search and enter your Instant Messaging and Calendar settings.

Default Search Settings

Default Search Page: Advanced Search Basic Search

Rows Displayed: 15 items per page Language: English

Delivery Method Type: Program Display Option:

Instant Messaging Settings


Enabled

User ID: Instant Messaging Domain:

Calendar Settings

Login Information				
Vendor	User ID	Password	Enabled	Delete
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="button" value="Delete"/>

[+ Add Calendar Vendor](#)

Step	Action
1.	Use the Learning Preferences page to set your individual learning preferences. This allows your training to be matched to your preferences as close as possible.
2.	Click the Look up (Alt+5) button to the right of the Delivery Method Type field. 

Look Up ? Help


Search by: Delivery Method Type ID =

[Advanced Lookup](#)

Search Results

View 100 First Last

Name
Blended
Live
Online
Symposium
Webcast
Webinar


Step	Action
3.	Click the Online link. 

Learning Preferences
Select your learning preferences for Catalog Search and enter your Instant Messaging and Calendar settings.

Default Search Settings

Default Search Page: Advanced Search
 Basic Search

Rows: 15 items per page (dropdown)
Language: English (dropdown)

Displayed: [dropdown]
Delivery Method Type: Online (dropdown)  Program Display Option: [dropdown]



Instant Messaging Settings

Enabled


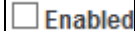


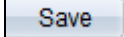
User ID: [input] Instant Messaging Domain: [dropdown]

Calendar Settings

Login Information

Vendor	User ID	Password	Enabled	Delete
[input] 	[input]	[input]	<input type="checkbox"/>	

[+ Add Calendar Vendor](#)

Step	Action
4.	Click the Program Display Option list. 
5.	You can select programs to display as either expanded or collapsed.
6.	Click the Enabled option. 
7.	Enter the desired information into the User ID field.
8.	Click the Instant Messaging Domain list. 
9.	Click the YAHOO list item. 
10.	Click the Save button. 
11.	Congratulations. You have set your learning preferences for ELM. End of Procedure.

Dropping an Enrollment

Navigation: Main Menu > ELM > Self Service > Learning > My Learning

Purpose: Use this transaction to practice dropping an enrollment.

My Learning

You can view five of your most current activities and programs or select the View All Learning link to view all of your activities and programs. You can search for learning using a keyword search or access the advanced search or browse catalog by selecting the corresponding link. To view your scheduled activities, select the View Calendar link. Submit a learning request by selecting the Request New Learning link.

Search Learning Catalog

Select Search Category: [Activities](#) | [Catalog Items](#) | [Programs](#) | [All](#)

Search the Catalog:

[Advanced Search](#) | [Browse Catalog](#) | [Request New Learning](#)

My Learning Activities						Personalize 1-5 of 8
Title	Type	Status	Date	Action	Launch	Delete
Annual Required Education Auto Enrollment	Online	<input checked="" type="checkbox"/> In-Progress	09/03/2014	<input type="button" value="Drop"/>	<input type="button" value="Launch"/>	
Non-Clinical New Employee Orientation	Online	<input checked="" type="checkbox"/> In-Progress	09/03/2014		<input type="button" value="Launch"/>	
Annual Required Education Auto Enrollment	Live	<input checked="" type="checkbox"/> Enrolled	09/10/2014	<input type="button" value="Drop"/>	<input type="button" value="Launch"/>	
Parking Lot Resurfacing	ARE 2010 Ver 1	<input checked="" type="checkbox"/> Planned	09/10/2014	<input type="button" value="Modify"/>		
Annual Required Education Auto Enrollment	Live	<input checked="" type="checkbox"/> Planned	09/08/2014	<input type="button" value="Enroll"/>		<input type="button" value="Delete"/>

[All My Learning](#) [View Calendar](#)

Step	Action
1.	Use the My Learning page to review your five most current activities and programs. Records with a status of In-Progress take precedence followed by those with a status of Enrolled or Registered, Waitlisted, Approval Pending, and Planned.
2.	Use buttons on the page to enroll in, delete, or drop an activity or program, modify supplemental learning, or launch web-based learning. Available actions depend on business rules, such as add and drop deadlines and delivery method.
3.	Click the Drop button. <input style="border: 1px solid black;" type="button" value="Drop"/>

Drop Activity

Review Information

Bernard Buick, Supervisor Janitorial Staff, BHSF Main

Are you sure you want to drop this activity?

Confirmation Number: 19960

Activity Name: [Annual Required Education Auto Enrollment](#) Type: Live

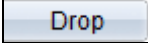
Activity Code: Elsevier - Connect01 Contact: [Trudy-Ann Armand](#)

Price Per Seat: 0.00 USD Drop Charge: 0.00 USD

Enrollment Status: Enrolled Confirmation Number: 19960

Start Date: 06/19/2014 End Date: --

Last Enrollment Date: -- Last Drop Date: --

Step	Action
4.	Use the Review Information page to review information for the activity or program that you are about to drop, including the last drop date or any applicable drop charges.
5.	Click the Drop button. 

Drop Activity

Drop Confirmation

Bernard Buick, Supervisor Janitorial Staff, BHSF Main

✓ You have successfully dropped this activity.

Activity Name: [Annual Required Education Auto Enrollment](#) Type: Live

Activity Code: Elsevier - Connect01 Contact: [Trudy-Ann Armand](#)

Price Per Seat: 0.00 USD Drop Charge: 0.00 USD

Enrollment Status: Dropped Confirmation Number: 19960

Start Date: 06/19/2014 End Date: --

Last Enrollment Date: -- Last Drop Date: --

[Search Catalog](#) [Browse Catalog](#) [My Learning](#)

Step	Action
6.	Note, you have successfully dropped the activity.
7.	Congratulations. You have dropped an enrollment. End of Procedure.

Launching Web-based Session or Materials

Navigation: Main Menu > ELM > Self Service > Learning > My Learning

Purpose: Use this transaction to practice launching web-based sessions or materials.

My Learning

You can view five of your most current activities and programs or select the View All Learning link to view all of your activities and programs. You can search for learning using a keyword search or access the advanced search or browse catalog by selecting the corresponding link. To view your scheduled activities, select the View Calendar link. Submit a learning request by selecting the Request New Learning link.

Search Learning Catalog

Select Search Category: [Activities](#) | [Catalog Items](#) | [Programs](#) | [All](#)

Search the Catalog:

[Advanced Search](#) [Browse Catalog](#) [Request New Learning](#)

Title	Type	Status	Date	Action	Launch	Delete	Print
Annual Required Education Auto Enrollment	Online	In-Progress	09/03/2014	<input type="button" value="Drop"/>	<input type="button" value="Launch"/>		
Non-Clinical New Employee Orientation	Online	In-Progress	09/03/2014		<input type="button" value="Launch"/>		
Parking Lot Resurfacing	ARE 2010 Ver 1	Planned	09/10/2014	<input type="button" value="Modify"/>			
Annual Required Education Auto Enrollment	Live	Planned	09/08/2014	<input type="button" value="Enroll"/>		<input type="button" value="Delete"/>	
Navigating PeopleSoft ELM	ARE 2010 Ver 1	Completed	10/22/2014				<input type="button" value="Print"/>

[All My Learning](#) [View Calendar](#)

Step	Action
1.	<p>Use the My Learning page to review your five most current activities and programs.</p> <p>Use buttons on the page to enroll in, delete, or drop an activity or program, modify supplemental learning, or launch web-based learning.</p> <p>In this example, you will launch web-based learning.</p>
2.	<p>Click the Launch button to the right of the appropriate activity.</p> <p><input type="button" value="Launch"/></p>

Baptist Health South Florida

search

Navigation: Main Menu > Inventory > Manage Inventory > Reports > Stock Status

Objective: When you complete this simulation you will be able to:

- * Create a new Run Control ID for a report
- * Set report parameters
- * Use the Process Scheduler Request page to initiate reports
- * Use the Process Monitor to check the status of reports and processes
- * Use the Report Manager to view reports

Prerequisite: PeopleSoft Basic Navigation course.

Step	Action
3.	The selected learning component is launched in a separate window. When you complete or exit the component, the window will close and you will be returned to the ELM page from where the component was launched.

My Learning

You can view five of your most current activities and programs or select the View All Learning link to view all of your activities and programs. You can search for learning using a keyword search or access the advanced search or browse catalog by selecting the corresponding link. To view your scheduled activities, select the View Calendar link. Submit a learning request by selecting the Request New Learning link.

Search Learning Catalog

Select Search Category: [Activities](#) | [Catalog Items](#) | [Programs](#) | [All](#)

Search the Catalog:

[Advanced Search](#) | [Browse Catalog](#) | [Request New Learning](#)

My Learning Activities						Personalize 1-5 of 5
Title	Type	Status	Date	Action	Launch	Delete
Annual Required Education Auto Enrollment	Online	<input checked="" type="checkbox"/> In-Progress	09/03/2014	<input type="button" value="Drop"/>	<input type="button" value="Launch"/>	
Non-Clinical New Employee Orientation	Online	<input checked="" type="checkbox"/> In-Progress	09/03/2014		<input type="button" value="Launch"/>	
Parking Lot Resurfacing	ARE 2010 Ver 1	<input checked="" type="checkbox"/> Planned	09/10/2014	<input type="button" value="Modify"/>		
Annual Required Education Auto Enrollment	Live	<input checked="" type="checkbox"/> Planned	09/08/2014	<input type="button" value="Enroll"/>		<input type="button" value="Delete"/>
Navigating PeopleSoft ELM	ARE 2010 Ver 1	<input type="checkbox"/> Completed	10/22/2014			<input type="button" value="Print"/>

[All My Learning](#) [View Calendar](#)

Step	Action
4.	You are returned to My Learning page.
5.	Congratulations. You have launched a web-based session/material. End of Procedure.

Printing Completion Certification

Navigation: Main Menu > ELM > Self Service > Learning > My Learning

Purpose: Use this simulation to practice printing a certificate for completed learning.

My Learning

You can view five of your most current activities and programs or select the View All Learning link to view all of your activities and programs. You can search for learning using a keyword search or access the advanced search or browse catalog by selecting the corresponding link. To view your scheduled activities, select the View Calendar link. Submit a learning request by selecting the Request New Learning link.

Search Learning Catalog


Select Search Category: [Activities](#) | [Catalog Items](#) | [Programs](#) | [All](#)

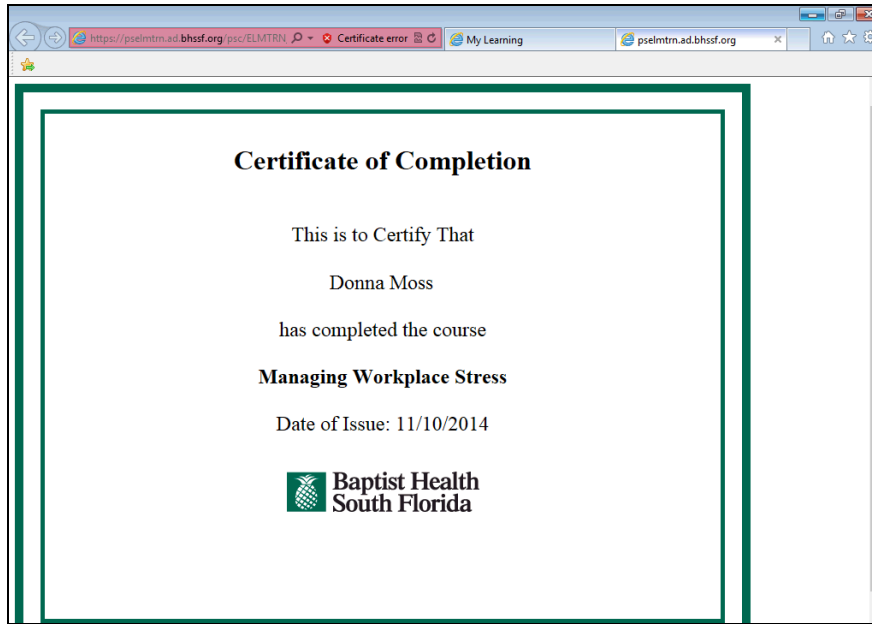
Search the Catalog:

[Advanced Search](#) [Browse Catalog](#) [Request New Learning](#)

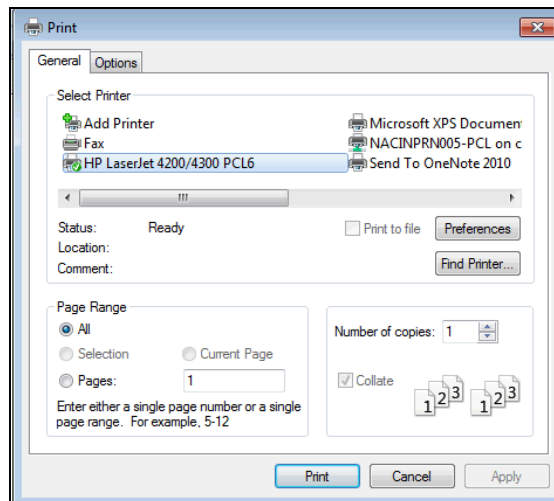
My Learning Activities						Personalize 1-4 of 4
Title	Type	Status	Date	Action	Launch	
"ECA-Mod 33: Toxicologic Emergencies, Poisoning"	Online	<input checked="" type="checkbox"/> In-Progress	10/30/2014	<input type="button" value="Drop"/>	<input type="button" value="Launch"/>	
AACN Pharma: Blood & Blood Prod	Online	<input checked="" type="checkbox"/> In-Progress	10/30/2014		<input type="button" value="Launch"/>	
Self-Care Selfish or Selfless	Live	<input type="checkbox"/> Enrolled	10/29/2014			
Managing Workplace Stress	Live	<input checked="" type="checkbox"/> Completed	11/10/2014			<input type="button" value="Print Certificate"/>

[All My Learning](#) [View Calendar](#)

Step	Action
1.	Use the My Learning page to view your five most recent learning activities and launch learning, add or drop learning activities and programs, and print a completion certificate. In this example, you will print a certificate for completed learning.
2.	Click the Print Certificate button to the right of the appropriate learning activity. 
3.	Your Certificate of Completion opens in a new browser window.




Step	Action
4.	Right-click the Certificate of Completion window.
5.	Click the Print... menu. <div style="border: 1px solid black; padding: 2px; width: fit-content; margin-top: 5px;">Print...</div>



Step	Action
6.	Click the Print button. <div style="border: 1px solid black; padding: 2px; width: fit-content; margin-top: 5px;">Print</div>



Step	Action
7.	Click the Close Tab (Ctrl+W) button. 
8.	Congratulations. You have printed a certificate of completion. End of Procedure.

Reviewing Program Status and Progress

Navigation: Main Menu > ELM > Self Service > Learning > My Learning

Purpose: Use this transaction to practice reviewing program and activity statuses and progress.

My Learning

You can view five of your most current activities and programs or select the View All Learning link to view all of your activities and programs. You can search for learning using a keyword search or access the advanced search or browse catalog by selecting the corresponding link. To view your scheduled activities, select the View Calendar link. Submit a learning request by selecting the Request New Learning link.

Search Learning Catalog

Select Search Category: [Activities](#) | [Catalog Items](#) | [Programs](#) | [All](#)

Search the Catalog:

[Advanced Search](#) [Browse Catalog](#) [Request New Learning](#)

My Learning Activities Personalize | 1-2 of 2

Title	Type	Status	Date	Launch
Self-Care Selfish or Selfless	Live	Enrolled	10/29/2014	
AACN Pharma: Blood & Blood Prod	Online	Enrolled	10/29/2014	<input type="button" value="Launch"/>

[All My Learning](#) [View Calendar](#)

Step	Action
1.	My Learning page only displays the five most recent learning activities. To review additional activities, click the All My Learning link.
2.	Click the All My Learning link. All My Learning

All Learning

All Learning is a list of the activities you are enrolled in or completed and curricula and certifications for which you are registered or completed. You can view details, progress status, and schedules by clicking on the name of the activity or program.


*Filter Name:

My Learning Personalize | Find | View All | 1-2 of 2 | First | 1-2 of 2 | Last

Title	Type	Status	Status	Date	Launch
Self-Care Selfish or Selfless	Live	Enrolled	Enrolled	10/29/2014	
AACN Pharma: Blood & Blood Prod	Online	Enrolled	Enrolled	10/29/2014	<input type="button" value="Launch"/>

[My Learning](#) [Search Catalog](#) [Browse Catalog](#) [Request New Learning](#)

Step	Action
3.	Use the All Learning page to review a list of all activities you are enrolled in or completed, as well as curricula and certifications for which you are registered or completed. You can also view details and progress status by clicking on the name of an activity or program. Use the Filter Name drop-down to filter and display different learning activities.

4.	Click the Filter Name list. 
5.	Currently, this page is set to display all learning activities. To narrow your activities, you can select to view only completed external and internal learning, learning completed for last 90 days (not dropped or deleted), or all learning from the past year. To apply the filter, select the appropriate list item and click the Go button.
6.	Congratulations. You have reviewed program and activity statuses and progress. End of Procedure.

Reviewing Overall Learning Progress

Navigation: Main Menu > ELM > Self Service > Learning > My Learning

Purpose: Use this transaction to practice reviewing your overall learning progress.

My Learning

You can view five of your most current activities and programs or select the [View All Learning](#) link to view all of your activities and programs. You can search for learning using a keyword search or access the advanced search or browse catalog by selecting the corresponding link. To view your scheduled activities, select the [View Calendar](#) link. Submit a learning request by selecting the [Request New Learning](#) link.

Search Learning Catalog

Select Search Category: [Activities](#) | [Catalog Items](#) | [Programs](#) | [All](#)

Search the Catalog:

[Advanced Search](#) [Browse Catalog](#) [Request New Learning](#)

Title	Type	Status	Date	Action	Launch	Delete	Print
Annual Required Education Auto Enrollment	Online	<input checked="" type="checkbox"/> In-Progress	09/03/2014	<input type="button" value="Drop"/>	<input type="button" value="Launch"/>		
Non-Clinical New Employee Orientation	Online	<input checked="" type="checkbox"/> In-Progress	09/03/2014		<input type="button" value="Launch"/>		
Parking Lot Resurfacing	ARE 2010 Ver 1	<input checked="" type="checkbox"/> Planned	09/10/2014	<input type="button" value="Modify"/>			
Annual Required Education Auto Enrollment	Live	<input checked="" type="checkbox"/> Planned	09/08/2014	<input type="button" value="Enroll"/>		<input type="button" value="Delete"/>	
Navigating PeopleSoft ELM	ARE 2010 Ver 1	<input type="checkbox"/> Completed	10/22/2014				<input type="button" value="Print"/>

[All My Learning](#) [View Calendar](#)

Step	Action
1.	My Learning page only displays the five most recent learning activities. To review additional activities, click the All My Learning link.
2.	Click the All My Learning link. All My Learning

All Learning

All Learning is a list of the activities you are enrolled in or completed and curricula and certifications for which you are registered or completed. You can view details, progress status, and schedules by clicking on the name of the activity or program.

*Filter Name:

My Learning									Personalize	Find	View All	First	1-7 of 7	Last
Title	Type	Status	Status	Date	Action	Launch	Delete	Print						
Annual Required Education Auto Enrollment	Online		In-Progress	09/03/2014	<input type="button" value="Drop"/>	<input type="button" value="Launch"/>								
Non-Clinical New Employee Orientation	Online		In-Progress	09/03/2014		<input type="button" value="Launch"/>								
Parking Lot Resurfacing	ARE 2010 Ver 1		Planned	09/10/2014	<input type="button" value="Modify"/>									
Annual Required Education Auto Enrollment	Live		Planned	09/08/2014	<input type="button" value="Enroll"/>									
Navigating PeopleSoft ELM	ARE 2010 Ver 1		Completed	10/22/2014										
Lawn Maintenance in Dry Weather	ARE 2010 Ver 1		Completed	09/29/2014										
Annual Required Education Auto Enrollment	Live		Dropped	09/11/2014										

[My Learning](#) [Search Catalog](#) [Browse Catalog](#) [Request New Learning](#)

Step	Action
3.	Use the All Learning page to review the status of all your learning.
4.	Congratulations. You have reviewed your overall learning progress. End of Procedure.

Managing Paid Time Off

Donating Paid Time Off

Navigation: Main Menu > HCM > Self Service > Benefits > PTO Donations

Purpose: Use this transaction to practice donating a portion of your paid time off to another employee.

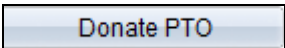
Prerequisites: You must donate at least 4 hours, have more than 40 hours of PTO and, after donation, must have a balance of at least 40 hours PTO remaining.

Leave Sharing Program

Name: Claudia Cregg	Department: 40010
Empl ID: 10000	Leave Balance: 363.098

Welcome to the Leave Sharing Program Page. The Leave Sharing Program provides employees an opportunity to voluntarily donate their earned Paid Time Off(PTO) to other employees who are suffering financial hardship due to covered unforeseen circumstances. In order to make a donation please click on the box below:

Please Note: To donate Paid Time Off (PTO), a minimum of 40 PTO hours must remain in your PTO bank.


Step	Action
1.	Click the Donate PTO button. 

PTO Donations Request ID NEW

Donor Information (Current):

Name: Claudia Cregg
 Empl ID: 10000
 Department: 40010
 Location Code: 200001
 Leave Balance: 363.098

Recipient Information:


*Recipient: 
 *PTO Hours to Donate: (Minimum of 4.0 hours)

I hereby voluntarily donate the number of Paid Time Off (PTO) hours listed above from my Paid Time OFF (PTO) bank to the recipient named above as described by the Leave Sharing Policy 3450. I understand that hours will be placed in the recipient's PTO bank. I am aware and understand that I must maintain a minimum balance of 40 hours in my PTO bank.

By clicking the Submit Button below you are acknowledging that you approve this donation.

To Be Completed by Recipient Leader Only:

PTO Donation Reason:
 Leave Type:

Step	Action
2.	Click the Look up Recipient (Alt+5) button. 

Look Up Recipient ? Help

Search by: Recipient Emplid begins with

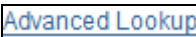
[Advanced Lookup](#)

Search Results

Only the first 300 results can be displayed.

[View 100](#) First 1-300 of 300 Last

Recipient Emplid	Display Name	Business Unit	Location Code	Location Description	Department	Department Description
033884	Marie Lamon	20350	400001	Doctors Hospital	73800	Safety
033886	Full time Test	10000	400001	Doctors Hospital	74640	Finance - DH
033887	Part Time Test	20200	100001	Baptist Hospital test	44800	Cancer Data Center
033890	Keith Jones	20250	700001	West Kendall Baptist Hospital	43000	Laboratory - Administration
033892	Full time Manager Test	20300	200001	South Miami Hospital	43600	Cardiac Administration

Step	Action
3.	Click the Advanced Lookup link. 

Look Up Recipient ? Help

Recipient Emplid: begins with

Display Name: begins with

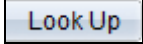
[Basic Lookup](#)

Search Results

Only the first 300 results can be displayed.

[View 100](#) First 1-300 of 300 Last

Recipient Emplid	Display Name	Business Unit	Location Code	Location Description	Department	Department Description
033884	Marie Lamon	20350	400001	Doctors Hospital	73800	Safety
033886	Full time Test	10000	400001	Doctors Hospital	74640	Finance - DH
033887	Part Time Test	20200	100001	Baptist Hospital test	44800	Cancer Data Center
033890	Keith Jones	20250	700001	West Kendall Baptist Hospital	43000	Laboratory - Administration
033892	Full time Manager Test	20300	200001	South Miami Hospital	43600	Cardiac Administration

Step	Action
4.	Enter the desired information into the Display Name field.
5.	Click the Look Up button. 

Look Up Recipient ? Help

Recipient Emplid: begins with

Display Name: begins with

[Basic Lookup](#)

Search Results

[View 100](#) First 1-18 of 18 Last

Recipient Emplid	Display Name	Business Unit	Location Code	Location Description	Department	Department Description
20000	Joshua Lyman	10000	600003	Atrium Building	60000	SR Secretary

Step	Action
6.	Click the appropriate Recipient Emplid link.

PTO Donations

Request ID NEW

Donor Information (Current):

Name: Claudia Cregg
 Empl ID: 10000
 Department: 40010
 Location Code: 200001
 Leave Balance: 363.098

Recipient Information:

*Recipient: Joshua Lyman
 *PTO Hours to Donate: (Minimum of 4.0 hours)

I hereby voluntarily donate the number of Paid Time Off (PTO) hours listed above from my Paid Time OFF (PTO) bank to the recipient named above as described by the Leave Sharing Policy 3450. I understand that hours will be placed in the recipient's PTO bank. I am aware and understand that I must maintain a minimum balance of 40 hours in my PTO bank.

By clicking the Submit Button below you are acknowledging that you approve this donation.

To Be Completed by Recipient Leader Only:

PTO Donation:
 Reason:
 Leave Type:

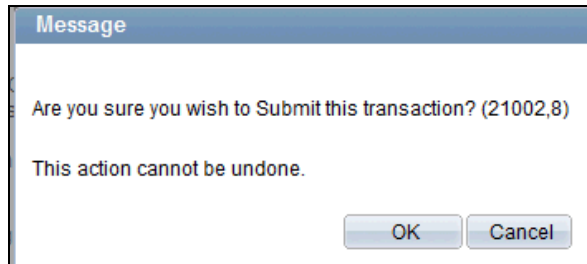
Step	Action
7.	Enter the desired information into the PTO Hours to Donate field.
8.	Scroll down the page.

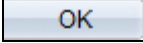
To Be Completed by Recipient Leader Only:

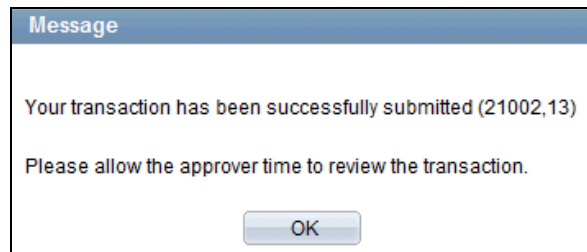
PTO Donation:
 Reason:
 Leave Type:

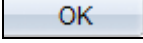
Workflow Approval

Step	Action
9.	Click the Submit button. <div style="border: 1px solid black; display: inline-block; padding: 2px 10px; margin-top: 5px;">Submit</div>



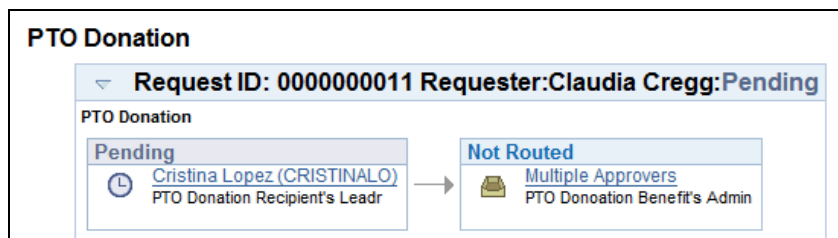
Step	Action
10.	Click the OK button. 



Step	Action
11.	Click the OK button. 



Step	Action
12.	Scroll down the page.



Step	Action
13.	Notice your request is now in Pending status and is awaiting approval.

Step	Action
14.	Congratulations. You have donated PTO to another employee. End of Procedure.

Emergency Paid Time Off Cashout

Navigation: Main Menu > HCM > Self Service > Benefits > Emergency PTO Cashout

Purpose: Use this transaction to practice cashing out Paid Time Off for use in an emergency situation.

Prerequisites: You must donate at least 4 hours, have more than 40 hours of PTO and, after donation, must have a balance of at least 40 hours PTO remaining.

Emergency PTO Cashout

▶ Instructions (Click to Expand/Collapse)

▼ Employee Information (Current Information)

Name:	Claudia Cregg	Department:	40010
Empl ID:	10000	Leave Hours:	363.098
Telephone:	954/355-1333	Email Address:	NoReply_PeopleSoft@baptisthealth.net
Company:	300	Hourly Rate:	25.000000
Pay Group:	300		

▶ Information (Click to Expand/Collapse)

*PTO Cashout Reason <input type="text"/>	Penalty Applied? <input type="checkbox"/>	Penalty Percent	0.00	Transaction ID	1
Supporting Document:	<input type="text" value="Pending"/>	Approval Status:	Initial		


*Requested Amount:	<input type="text" value="0.000"/>	Supporting Documentation is required in order to complete the request for PTO Cash Out. Documentation can be emailed to benefits@baptisthealth.net , faxed to 786-533-9300, or uploaded using the attachment option
Penalty Amount:	0.00	
Estimated Tax:	0.00	
Estimated Amount:	0.000	
Estimated PTO Needed:	0.00	

Supporting Documents

Workflow Approval

Step	Action
1.	Use the Emergency PTO Cashout page to cashout a portion of your unused PTO hours for use in an emergency. Before you begin, review your current leave hours. In this example, the employee has 363.098 leave hours.
2.	Scroll down the page.

Information (Click to Expand/Collapse)

*PTO Cashout Reason  Penalty Applied? Penalty Percent 0.00 Transaction ID 1

Supporting Document: Pending Approval Status: Initial

*Requested Amount: 0.000 Supporting Documentation is required in order to complete the request for PTO Cash Out. Documentation can be emailed to benefits@baptisthealth.net, faxed to 786-533-9300, or uploaded using the attachment option

Penalty Amount: 0.00

Estimated Tax: 0.00


Estimated Amount: 0.000

Estimated PTO Needed: 0.00

Supporting Documents:

Workflow Approval:

Attached File:

Step	Action
3.	Click the Look up PTO Cashout Reason (Alt+5) button. 


Look Up PTO Cashout Reason Help

Search by: PTO Cashout Reason begins with

[Advanced Lookup](#)

Search Results

View 100 First 1-9 of 9 Last

PTO Cashout Reason	Description	Penalty Applied?	Manual Check	Penalty Due
	Need New Clothes	Yes	No	1
9	Need Money for Funeral - TST	No	(blank)	0
CAT	Natural Catastrophe	No	Yes	0
COL	**College Tuition Expenses	Yes	No	6
HLT	Non-Reimbursed Healthcare Expense	No	No	0
HME	Imminent Loss of Home	No	Yes	0
LGL	**Legal Fees for Domestic/Child Custody Issue	Yes	No	6
RSD	**Purchase Residence	Yes	No	6
VHC	**Vehicle Purchase or Repair (Greater than \$500)	Yes	No	6

Step	Action
4.	Select the appropriate PTO Cashout Reason from the table. Before continuing to cashout, you may want to consider whether a penalty will be applied and, if there is a penalty, the penalty due. The penalty can range from 1-6% of the requested dollar amount. You may also want to consider whether you will be receiving a manual check.

Step	Action
5.	Click the appropriate PTO Cashout Reason link.

Information (Click to Expand/Collapse)

*PTO Cashout Reason Penalty Applied? No Penalty Percent 0.00 Transaction ID 1

Supporting Document: Approval Status: Initial

*Requested Amount: Supporting Documentation is required in order to complete the request for PTO Cash Out. Documentation can be emailed to benefits@baptisthealth.net, faxed to 786-533-9300., or uploaded using the attachment option

Penalty Amount: 0.00

Estimated Tax: 0.00

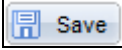
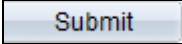
Estimated Amount: 0.000

Estimated PTO Needed: 0.00

Supporting Documents

Attached File:

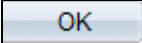
Workflow Approval

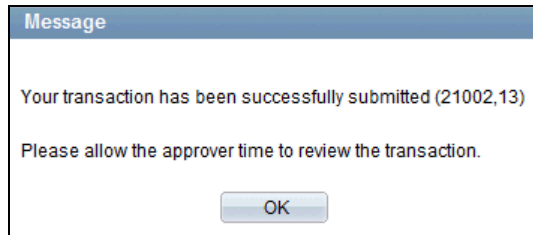
Step	Action
6.	Enter the desired dollar amount into the Requested Amount field.
7.	Before submitting your request, click the Save button. This will refresh the page to show the estimated PTO needed and, if applicable, the penalty and tax amount. 
8.	Before continuing, ensure you have enough PTO and that, once the estimated amount is deducted, you will have 40 or more hours still available in your PTO balance. You cannot cashout and have less than 40 hours PTO available.
9.	Click the Submit button. 

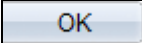
Message

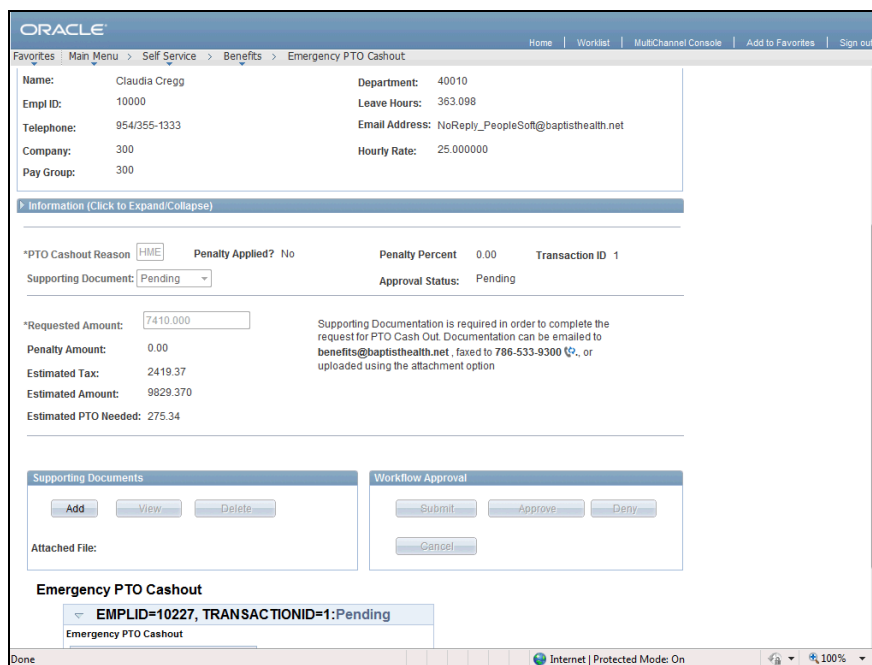
Are you sure you wish to Submit this transaction? (21002,8)

This action cannot be undone.

Step	Action
10.	Click the OK button. 



Step	Action
11.	Click the OK button. 



Step	Action
12.	Before your request can be approved, supporting documentation is required. You can upload your documentation on this page by clicking the Add button in the Supporting Documents section, or you can email or fax it to the above address and number.
13.	Congratulations. You have successfully submitted a request to cashout PTO for use in an emergency. End of Procedure.

Making Campaign Donations


Making a Campaign Donation - Payroll Donation

Navigation: Main Menu > HCM > Self Service > BH Donation Campaigns > Philanthropist Club

Purpose: Use this transaction to practice making a one time payroll donation to a campaign.

Philanthropist Club

Give Back Today. For A Better Tomorrow.



BAPTIST HEALTH SOUTH FLORIDA

Name: Joshua Lyman	Department: 68830
Empl ID: 20000	PTO Balance: 175.94 as of 11/05/2014

Welcome to the Philanthropist Club gift page. To make a donation or a recurring gift:

1. Choose a donation method and amount.
2. Select a fund to which you would like to contribute.
3. Click Submit.

Please Select a Donation Method:

Step	Action
1.	Click the Please Select a Donation Method list. <input style="width: 20px;" type="text" value="▼"/>
2.	There are several donation methods available. In this example, click the One Time Payroll Donation list item. <input style="width: 150px;" type="text" value="One Time Payroll Donation"/>
3.	Enter the desired information into the Enter Donation Amount field.
4.	Click the Group list. <input style="width: 20px;" type="text" value="▼"/>
5.	Click the appropriate Group list item.
6.	Click the Fund list. <input style="width: 20px;" type="text" value="▼"/>
7.	Click the appropriate Fund list item.
8.	Scroll down the page.

Name: Joshua Lyman	Department: 68830
Empl ID: 20000	PTO Balance: 175.94 as of 11/05/2014

Welcome to the Philanthropist Club gift page. To make a donation or a recurring gift:

1. Choose a donation method and amount.
2. Select a fund to which you would like to contribute.
3. Click Submit.

Please Select a Donation Method:

Enter Donation Amount:

Total Annual Donation Amount: \$50.00

Required: Please specify the group and fund to which you would like your donation credited:

Step	Action
9.	Click the Save button. <input type="button" value="Save"/>

Message
Save Confirmation! (28000,81)
Thank you for your contribution to the Philanthropist Club. Your donation has been submitted successfully.
<input type="button" value="OK"/>

Step	Action
10.	Click the OK button. <input type="button" value="OK"/>
11.	Depending on timing, you may not see your donation reflected on your next paycheck.
12.	Congratulations. You have donated to a campaign with a one time payroll deduction. End of Procedure.


Making a Campaign Donation - Paid Time Off Donation

Navigation: Main Menu > HCM > Self Service > BH Donation Campaigns > Philanthropist Club

Purpose: Use this transaction to practice donating PTO to a campaign.

Philanthropist Club

Give Back Today. For A Better Tomorrow.



BAPTIST HEALTH SOUTH FLORIDA

Name: Joshua Lyman	Department: 68830
Empl ID: 20000	PTO Balance: 175.94 as of 11/05/2014

Welcome to the Philanthropist Club gift page. To make a donation or a recurring gift:

1. Choose a donation method and amount.
2. Select a fund to which you would like to contribute.
3. Click Submit.

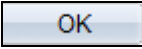
Please Select a Donation Method:

Step	Action
1.	Click the Please Select a Donation Method list. <input style="width: 20px; height: 20px;" type="text" value="v"/>
2.	There are two ways you can donate PTO: by hour or by dollar equivalent. Select PTO Hour Donation to enter a number of hours you would like to donate. The system will calculate the donation amount based on the hours. Select PTO Dollar Equivalent to enter a donation amount. The system will calculate the hours of PTO required for the donation amount. In this example, you will select PTO Hour Donation.
3.	Click the PTO Hour Donation list item. <input style="width: 150px;" type="text" value="PTO Hour Donation"/>

Message

Read below Carefully! (28000,35)

Pursuant to IRS guidelines, payroll and income taxes must be taken out of any PTO donation. PTO hours will be calculated and deducted at the current rate of pay as of April 2014. PTO must be donated in quarter-hour increments and donations may be rounded up to meet this requirement. These dollars, less taxes withheld, will be given to the Foundation. Donations may be tax-deductible. Consult your tax advisor.

Step	Action
4.	When donating PTO, an important message regarding taxes is shown. Read this message carefully.
5.	Click the OK button. 

Name: Joshua Lyman	Department: 68830
Empl ID: 20000	PTO Balance: 175.94 as of 11/05/2014

Welcome to the Philanthropist Club gift page. To make a donation or a recurring gift:



1. Choose a donation method and amount.
2. Select a fund to which you would like to contribute.
3. Click Submit.

Please Select a Donation Method: PTO Hour Donation ▼

Enter PTO Hours Donation Amount:

Total Annual Donation Amount:

Required: Please specify the group and fund to which you would like your donation credited:

Step	Action
6.	Prior to donating PTO, review your balance. You must maintain a minimum of 40 hours PTO after donation.
7.	Enter the desired information into the Enter PTO Hours Donation Amount field.
8.	After entering the number of hours you would like to donate, the system displays the total donation amount when converted from PTO to dollars.
9.	Click the Group list. 
10.	Click the appropriate Group list item.
11.	Click the Fund list. 
12.	Click the appropriate Fund list item.
13.	Scroll down the page.

Name: Joshua Lyman	Department: 68830
Empl ID: 20000	PTO Balance: 175.94 as of 11/05/2014

Welcome to the Philanthropist Club gift page. To make a donation or a recurring gift:


1. Choose a donation method and amount.
2. Select a fund to which you would like to contribute.
3. Click Submit.

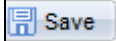
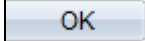
Please Select a Donation Method:

Enter PTO Hours Donation Amount:

Total Annual Donation Amount: \$134.70

Required: Please specify the group and fund to which you would like your donation credited:



Step	Action
14.	Click the Save button. 
15.	Click the OK button. 
16.	Congratulations. You have donated to a campaign using PTO. End of Procedure.

Registering for Events

Navigation: Main Menu > HCM > Self Service > BHSF Event Registration > Register for Events

Purpose: Use this transaction to practice registering for events.


Event Registration

Register for Event

3888
Joshua Lyman
South Miami Hospital

*Event ID:

Start

Step	Action
1.	Use the Register for Event page to select an event, enter your information, and complete event registration.
2.	Click the Look up Event ID (Alt+5) button. 

Look Up Event ID

Search by: Event ID begins with

Look Up Cancel Advanced Lookup

Search Results

View 100 First 1-3 of 3 Last

Event ID	Event Date	Event Name
MIAMI MAR	07/31/2014	MIAMI MARATHON
T&C RUN	10/17/2014	TOWN AND COUNTRY RUN
UNTWY	10/10/2014	MIAMI CORPORATE RUN

Step	Action
3.	Click the appropriate Event ID link.

Event Registration

Register for Event

3888
 Joshua Lyman
 South Miami Hospital

*Event ID: TOWN AND COUNTRY RUN

Step	Action
4.	Click the Start button. <input type="button" value="Start"/>


Message

Town & Country Corporate Run Waiver Message (29000, 1)

I know that participating in a run/walk event is potentially hazardous. I will not enter and participate unless I am medically able and properly trained.
 I agree to abide by any decision of a race official relative to my ability to safely complete the event. I assume all risks associated with the event, including, but not limited to, falls, contact with other participants, the effects of weather, including high heat and/or humidity, the conditions of the road and traffic on the course.
 All of these risks are known and appreciated by me. Having read this waiver and knowing these facts, and in consideration of your acceptance of my entry, I, for myself, and anyone acting on my behalf, waive, release and hold harmless TeamFootWorks, the Road Runners Club of America, all suppliers, all sponsors, including, but not limited to, South Florida Mercedes-Benz Dealers, and its affiliates, the City of Miami Bayfront Park, all the aforementioned named parties' respective directors, officers, employees, agents, assigns, representatives and successors and any individual or group associated therewith, from and against all claims, damages, liabilities, costs and expenses, of any kind, including reasonable attorneys' fees, arising out of my participation in this event, even though that liability may arise out of my negligence or carelessness, and/or the negligence or carelessness of any individual or organization named in this waiver.
 I grant permission to all of the foregoing to use any photographs, motion pictures, recordings, verbal or written statements, or any other record of this event, for any legitimate purpose.
 I am of legal age, have read this release, fully understand it, and freely agree to all of its terms.

Step	Action
5.	Depending on the event, the system may display a waiver message. Please read the message carefully and, if you agree, click the OK button.
6.	Click the OK button. <input type="button" value="OK"/>

Event Date: 10/17/2014

 **Baptist Health South Florida**

Event Name: TOWN AND COUNTRY RUN
 Event Description:
 Welcome to the Miami Town and Country Corporate Run
 Registration page for BHSF.

*Who are you registering?

Save Return to Event Selection

Step	Action
7.	Click the button to the right of the Who are you registering? field. <input type="button" value="▼"/>
8.	Click the appropriate Person list item.

*Who are you registering?
 Yourself

*First Name: Joshua *Last Name: Lyman

*Delivery Location: 200001 South Miami Hospital

*Team to Represent: 20300 South Miami Hospital

*Address 1: 4115 Forest Ave
 Address 2: #2
 *City: Miami *State: FL Florida

*Postal: 33172

*Email:

*Phone:

*Gender: Male

*Age on Event Date:

*Est. Finish Time (minutes):

*Walk/Run/Sleep:

*Adult T-Shirt Size:





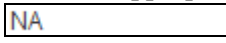
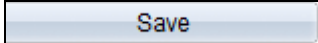
*Youth T-Shirt Size:

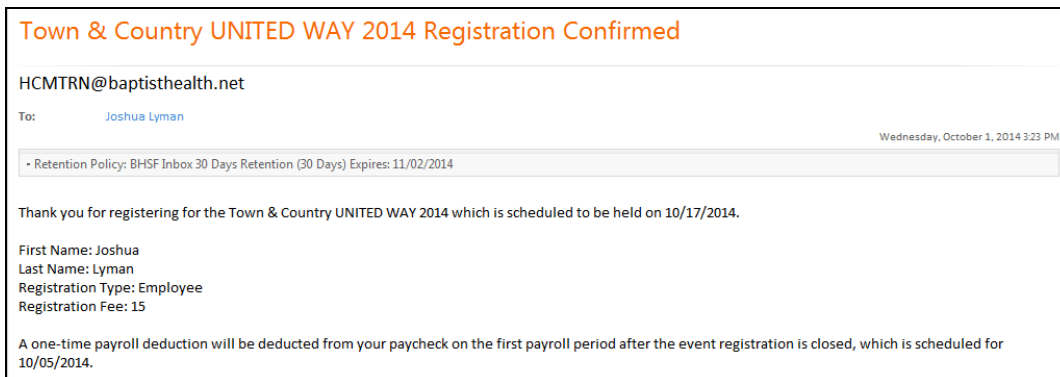
*Lunch Preference:

*Metrorail Pass Required:

Save Return to Event Selection

Step	Action
9.	To register additional people, click the Add a new row icon. In this example, only the employee is being registered.
10.	If you are registering yourself, some of your information (such as name and address) should automatically be filled in for you. Please review and enter all required information.

Step	Action
11.	Enter the desired information into the Email field.
12.	Enter the desired information into the Phone field.
13.	Click the button to the right of the Walk/Run/Sleep field. 
14.	Click the appropriate Walk/Run/Sleep list item.
15.	Click the button to the right of the Adult T-Shirt Size field. 
16.	Click the appropriate Size list item.
17.	Enter the desired information into the Age on Event Date field.
18.	Enter the desired information into the Est. Finish Time(minutes) field.
19.	Click the button to the right of the Lunch Preference field. 
20.	Click the appropriate Lunch Preference list item.
21.	Note, although the employee has already selected a shirt size, all fields on this page are required.
22.	Click the button to the right of the Youth T-Shirt Size field. 
23.	Click the appropriate Youth T-Shirt Size list item. 
24.	Click the Save button. 
25.	After saving the registration, you should receive a confirmation email. This email includes information on who has been registered, registration type, and registration fee (if any).



Step	Action
26.	<p>Prior to registering for an event, you should receive an email informing you of any registration fees. These fees are at a reduced price you can take advantage of before the event takes place.</p> <p>Any registration fees will be paid through a one time payroll deduction.</p>
27.	<p>Congratulations. You have registered for an event. End of Procedure.</p>

Managing Travel Authorizations and Expenses

Creating a Travel Authorization

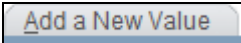
Navigation: Main Menu > FSCM > Employee Self-Service > Travel and Expenses Center > Click the Create link under Travel Authorization

Purpose: Use this transaction to practice creating a travel authorization.

Note: Refer to BHSF Travel and Expense policies for specific requirements.

Step	Action
1.	Use this page to search for an existing travel authorization or create a new one. In this example, you will create a new travel authorization.

The screenshot shows the 'Travel Authorization' search page. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. Below the tabs is a 'Search Criteria' section with a dropdown menu. The search criteria is set to 'Authorization ID' and 'begins with'. There is a text input field for the search value. Below the search criteria, there are two buttons: 'Search' and 'Advanced Search'. At the bottom of the page, there are two links: 'Find an Existing Value' and 'Add a New Value'.

Step	Action
2.	Click the Add a New Value tab. 

Travel Authorization

Find an Existing Value | Add a New Value

Empl ID:

Add

[Find an Existing Value](#) | [Add a New Value](#)

Step	Action
3.	Enter the desired information into the Empl ID field. For example, enter "29669".
4.	Click the Add button.

Create Travel Authorization

Travel Authorization Entry

Raphael Vera [User Defaults](#) Authorization ID: NEXT

Quick Start:

General Information

*Description: Comment:

*Business Purpose:

Default Location: Attachments (0)

*Date From: *Date To:

[Accounting Defaults](#) [View Policy](#) More Options:



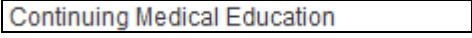



Select	*Expense Type	*Date	*Amount	Currency	Attachments	*Payment Type	*Billing Type
	<input type="text"/>				<input type="button" value="Add"/>		
	<input type="text"/>				<input type="button" value="Add"/>		
	<input type="text"/>				<input type="button" value="Add"/>		
	<input type="text"/>				<input type="button" value="Add"/>		

Totals

Authorized Amount: 0.00 USD

[Create A Cash Advance](#) [Project Summary](#) [Printable View](#)

Step	Action
5.	Click the button to the right of the Quick Start field.

Step	Action
6.	<p>There are several options when creating a travel authorization, including:</p> <ul style="list-style-type: none"> - A Template: Select to create an expense report based on an existing template. - An Existing Authorization: Select to copy expenses from an existing expense report. <p>In this example, you will create a Blank Authorization.</p>
7.	<p>Click the A Blank Authorization list item.</p> 
8.	<p>Click in the Description field.</p>
9.	<p>Click the button to the right of the Business Purpose field.</p> 
10.	<p>Click the appropriate Business Purpose list item.</p> 
11.	<p>Enter the desired information into the From Date field.</p>
12.	<p>Enter the desired information into the To Date field.</p>
13.	<p>Click the Expense Type list.</p> 
14.	<p>Click the appropriate Expense Type list item.</p>
15.	<p>Enter the desired information into the Expense Date field.</p>
16.	<p>Enter the desired information into the Expense Amount field.</p>
17.	<p>Click the Payment Type list.</p> 
18.	<p>Click the appropriate Payment Type list item.</p>
19.	<p>Click the Detail link to enter additional information regarding the selected expense type.</p> 

Create Travel Authorization

Authorization Detail for Air Travel - Domestic (Line 1)

Raphael Vera Authorization ID: NEXT

About This Expense

*Date: 11/17/2014

*Payment Type: Credit Card

*Billing Type: Internal

Ticket Number:

*Merchant (Choose One):

Preferred:

Non-preferred:

*Amount: 347.00 USD

Exception Comments

Non-Preferred Merchant:

[Accounting Detail](#)

[Return to Travel Authorization Entry](#)

Step	Action
20.	Click the button to the right of the Preferred field. <input type="button" value="v"/>
21.	Click the appropriate Merchant Preferred list item.
22.	Click the Accounting Detail link. Accounting Detail

Create Travel Authorization

Accounting Detail

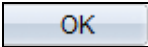
Raphael Vera Authorization ID: NEXT

This is the accounting detail for expense type Air Travel - Domestic with a transaction date of 2014-11-17 in the amount of 347 USD. If changes are made inadvertently, you may reset the default accounting values by hitting the 'Restore Defaults' button

Accounting Summary Set Personalizations | Find | First 4 of 1 Last

Amount	*GL Unit	Dept	Account	Fund	Oper Unit	Affiliate	PC Bus Unit	Project	Activity	Source Type
347.00	10000	74690	678015							

Step	Action
23.	Use the Accounting Details page to view or edit ChartFields. Expense items are charged to a set of ChartFields that represent the business unit or department of the employee who is submitting the expense report.

Step	Action
24.	Click the OK button. 

Create Travel Authorization

Authorization Detail for Air Travel - Domestic (Line 1)

Raphael Vera Authorization ID: [NEXT](#)

About This Expense

*Date: [Add](#)

*Payment Type:

*Billing Type:

Ticket Number:

*Merchant (Choose One):

Preferred:

Non-preferred:

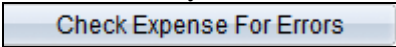
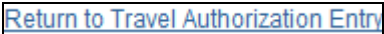
*Amount: USD

Exception Comments

Non-Preferred Merchant:

[Accounting Detail](#)

[Return to Travel Authorization Entry](#)

Step	Action
25.	Before continuing, click the Check Expense For Errors button. This will allow you to check and correct errors before submitting for review. 
26.	Click the Return to Travel Authorization Entry link to continue. 

ORACLE
 Home | Worklist | Add to Favorites | Sign out
 Favorites | Main Menu > Employee Self-Service
 New Window | Help | Personalize Page | http

Create Travel Authorization
Travel Authorization Entry
 Raphael Vera User Defaults Authorization ID: NEXT

General Information

*Description: Trip to Cincinnati Comment:

*Business Purpose: Continuing Medical Education

Default Location:

*Date From: 11/17/2014 *Date To: 11/19/2014 Attachments (0)

Accounting Defaults View Policy More Options: GO

Details

Select	*Expense Type	*Date	*Amount	Currency	Attachments	*Payment Type	*Billing Type	
<input type="checkbox"/>	Air Travel - Domestic	11/17/2014	347.00	USD	Add	Credit Card	Internal	*Detail
<input type="checkbox"/>					Add			
<input type="checkbox"/>					Add			
<input type="checkbox"/>					Add			

Copy Selected Delete Selected Check For Errors New Expense Add

Totals

Authorized Amount: 347.00 USD

Update Totals

Save for Later Submit Create A Cash Advance Project Summary Printable View

Return to Travel and Expense Center

Step	Action
27.	For each additional expense, repeat steps 14-27.

Create Travel Authorization
Travel Authorization Entry
 Raphael Vera User Defaults Authorization ID: NEXT

General Information

*Description: Trip to Cincinnati Comment:

*Business Purpose: Continuing Medical Education

Default Location:

*Date From: 11/17/2014 *Date To: 11/19/2014 Attachments (0)

Accounting Defaults View Policy More Options: GO

Details

Select	*Expense Type	*Date	*Amount	Currency	Attachments	*Payment Type	*Billing Type	
<input type="checkbox"/>	Air Travel - Domestic	11/17/2014	347.00	USD	Add	Credit Card	Internal	*Detail
<input type="checkbox"/>	Hotel - Domestic	11/17/2014	218.00	USD	Add	Credit Card	Internal	*Detail
<input type="checkbox"/>	Conference Fees - CME	11/17/2014	200.00	USD	Add	Credit Card	Internal	*Detail

Copy Selected Delete Selected Check For Errors New Expense Add

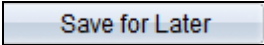
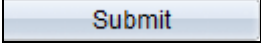
Totals

Authorized Amount: 765.00 USD

Update Totals

Save for Later Submit Create A Cash Advance Project Summary Printable View

Return to Travel and Expense Center

Step	Action
28.	If you are not prepared to submit your Travel Authorization at this time, click the Save for Later button. 
29.	Click the Submit button. 

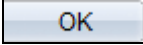
Create Travel Authorization

Submit Confirmation

Raphael Vera Authorization ID: 0000000046

Travel Authorization Totals	
Total:	765.00 USD
Less Non-Approved:	Total Authorized:

Click OK to submit, or click Cancel to return to the travel authorization without submitting.

Step	Action
30.	Click the OK button. 
31.	Congratulations. You have created a travel authorization. End of Procedure.

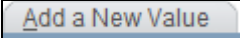
Creating a Blank Expense Report

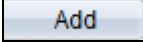
Navigation: Main Menu > FSCM > Employee Self Service > Travel and Expense Center > Click the Create link under Expense



Purpose: Use this transaction to practice creating a blank expense report.







Note: Refer to BHSF Travel and Expense policies for specific requirements.

Step	Action
1.	Use this page to search for an existing expense report or add a new expense report. In this example, you will create a new expense report.

Step	Action
2.	Click the Add a New Value tab. 

Step	Action
3.	Enter the desired information into the Empl ID field.
4.	If you do not know your Employee ID, you can click the Search button to search and select your ID number.
5.	Click the Add button. 

Step	Action
6.	Click the button to the right of the Quick Start field. 
7.	There are several options when creating an expense report, including: <ul style="list-style-type: none"> - A Template: Select to create an expense report from an existing template. - A Travel Authorization: Select to create an expense report based on a travel authorization. - Existing Report: Select to copy expenses from an existing expense report. - Entries From My Wallet: Select to access the My Wallet page, where you can select transactions to add to the expense report. <p>In this example, you will create a Blank Report.</p>
8.	Click the A Blank Report list item. 
9.	Enter the desired information into the Description field.

Step	Action
10.	Click the button to the right of the Business Purpose field. 
11.	Click the appropriate Business Purpose list item.
12.	Click the Expense Type list. 
13.	Click the appropriate Expense Type list item. 
14.	Enter the desired information into the Expense Date field.
15.	Click the Payment Type list. 
16.	Even though you have not directly paid for mileage, the system requires a payment type.
17.	Click the Cash/Check list item. 
18.	Click the Detail link to enter details regarding the expense incurred. 

Create Expense Report

Expense Detail for Mileage (Line 1)

Raphael Vera Report ID: [NEXT](#)

About This Expense ?

*Expense Date: [By](#) [Add](#)

*Payment Type: No Receipt

*Billing Type: Non-Reimbursable

*Miles: x 0.5600

Description:

*Amount Spent:

*Currency:

*Exchange Rate: [↻](#) [📄](#)

Default Rate

Reimbursement Amt: USD

Exception Comments ?

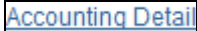
Location Amount:

No Receipt:

[Accounting Detail](#)

[Return to Expense Report](#)

Step	Action
19.	Enter the desired information into the Miles field.
20.	Click the No Receipt option. <input type="checkbox"/>

Step	Action
21.	Click the Accounting Detail link. 

Create Expense Report

Accounting Detail

Raphael Vera Report ID: NEXT

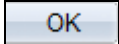
This is the accounting detail for expense type Mileage with a transaction date of 2014-10-27 in the amount of 84 USD. If changes are made inadvertently, you may reset the default accounting values by hitting the 'Restore Defaults' button.

Estimated Tax:
Total Distribution:

Accounting Detail Set Personalizations | Find | First 1 of 1 Last

General Ledger ChartFields FF

Amount	*GL Unit	Monetary Amount	Currency Code	Exchange Rate	Dept	Account	Fund	Oper Unit	Affiliate	PC Bus Unit	Project
84.00	10000	84.00	USD	1.00000000	74690	678005					

Step	Action
22.	Use the Accounting Details page to view or edit ChartFields. Expense items are charged to a set of ChartFields that represent the business unit or department of the employee who is submitting the expense report.
23.	Click the OK button. 

Create Expense Report

Expense Detail for Mileage (Line 1)

Raphael Vera Report ID: NEXT

About This Expense ?

*Expense Date: 10/27/2014 BT [Add](#)

*Payment Type: Cash/Check v No Receipt

*Billing Type: Internal v Non-Reimbursable

*Miles: 150 x 0.5600

Description: L2

*Amount Spent: 84.00

*Currency: USD

*Exchange Rate: 1.00000000 ↻ 📄

Default Rate

Reimbursement Amt: 84.00 USD

Exception Comments ?

Location Amount:

No Receipt: x

[Accounting Detail](#)

Check Expense For Errors

[Return to Expense Report](#)

Step	Action
24.	<p>Before continuing, click the Check Expense For Errors button.</p> <p>This will allow you to check and correct errors before submitting for review.</p> <div style="text-align: center; border: 1px solid black; background-color: #e0e0e0; padding: 5px; width: fit-content; margin: 0 auto;"> Check Expense For Errors </div>
25.	<p>No errors were found. Click the Return to Expense Report link to continue.</p> <div style="text-align: center; border: 1px solid black; background-color: #e0e0e0; padding: 2px; width: fit-content; margin: 0 auto;"> Return to Expense Report </div>

ORACLE
 Home | Worklist | Add to Favorites | Sign out
 Favorites | Main Menu > Employee Self-Service
 New Window | Help | Personalize Page | http

Create Expense Report
Expense Report Entry
 Raphael Vera [User Defaults](#) Report ID: NEXT

General Information

*Description: Meeting with Client Comment:

*Business Purpose: Off-Site Meeting Reference: [Attachments \(0\)](#)

Default Location:

Accounting Defaults [Apply Cash Advance\(s\)](#) [View Policy](#) More Options: **GO**

Details Personalize | Find | View All | First 1-4 of 4 Last

*Overview

Select	*Expense Type	*Expense Date	*Amount Spent	*Currency	*Payment Type	*Billing Type	
<input type="checkbox"/>	Mileage	10/27/2014	84.00	USD	Cash/Check	Internal	*Detail
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

Copy Selected Delete Selected Check For Errors New Expense Add

Totals

Employee Expenses:	84.00 USD	Due Employee:	84.00 USD
Non-Reimbursable Expenses:	0.00 USD	Due Vendor:	0.00 USD
Prepaid Expenses:	0.00 USD		
Employee Credits:	0.00 USD		
Vendor Credits:	0.00 USD		
Cash Advances Applied:	0.00 USD		

Definition of Totals **Update Totals**

By checking this box, I declare under penalty of perjury and to the best of my knowledge, that all the expenditures being submitted were incurred by me

Step	Action
26.	For each additional expense, repeat steps 12-25.

Create Expense Report
Expense Report Entry
 Raphael Vera [User Defaults](#) Report ID: NEXT

General Information

*Description: Meeting with Client Comment:

*Business Purpose: Off-Site Meeting Reference: [Attachments \(0\)](#)

Default Location:

Accounting Defaults [Apply Cash Advance\(s\)](#) [View Policy](#) More Options: **GO**

Details Personalize | Find | View All | First 1-4 of 4 Last

*Overview

Select	*Expense Type	*Expense Date	*Amount Spent	*Currency	*Payment Type	*Billing Type	
<input type="checkbox"/>	Mileage	10/27/2014	84.00	USD	Cash/Check	Internal	*Detail
<input type="checkbox"/>	Parking	10/27/2014	10.00	USD	Credit Card	Internal	*Detail
<input type="checkbox"/>	Entertainment/Client I	10/27/2014	75.00	USD	Credit Card	Internal	*Detail
<input type="checkbox"/>							

Copy Selected Delete Selected Check For Errors New Expense Add

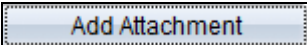
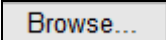
Totals

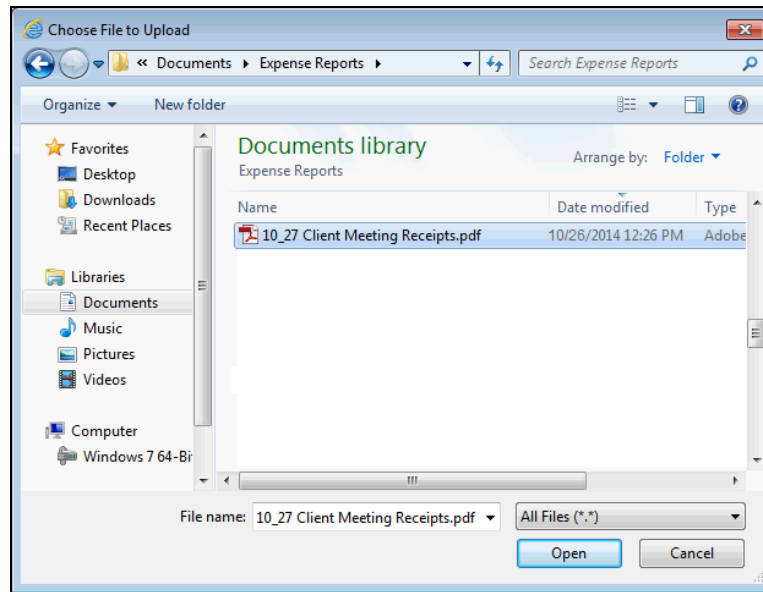
Employee Expenses:	169.00 USD	Due Employee:	169.00 USD
Non-Reimbursable Expenses:	0.00 USD	Due Vendor:	0.00 USD
Prepaid Expenses:	0.00 USD		
Employee Credits:	0.00 USD		
Vendor Credits:	0.00 USD		
Cash Advances Applied:	0.00 USD		

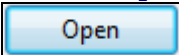
Definition of Totals **Update Totals**

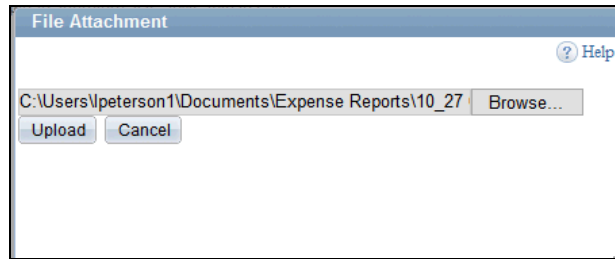
Step	Action
27.	After adding all expenses, you need to attach your receipts to the report. Click the Attachments link. Attachments (0)

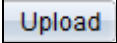


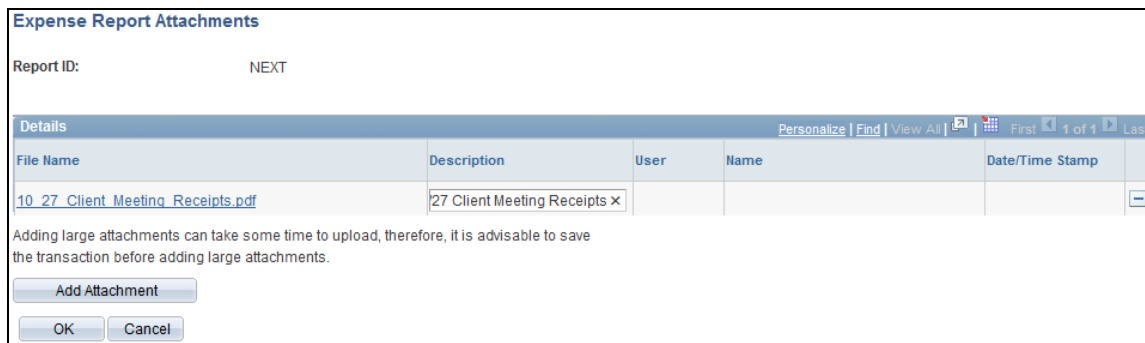
Step	Action
28.	Click the Add Attachment button. 
29.	Click the Browse... button. 

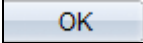


Step	Action
30.	Click the appropriate File Name list item.
31.	Click the Open button. 



Step	Action
32.	Click the Upload button. 



Step	Action
33.	Enter the desired information into the Description field.
34.	Click the OK button. 

General Information

*Description: Meeting with Client Comment:

*Business Purpose: Off-Site Meeting Reference: [Attachments \(1\)](#)

Default Location:

Accounting Defaults [Apply Cash Advance\(s\)](#) [View Policy](#) More Options: **GO**

Details Personalize | Find | View All | First 1-4 of 4 Last

*Overview **EXP**

Select	*Expense Type	*Expense Date	*Amount Spent	*Currency	*Payment Type	*Billing Type	
<input type="checkbox"/>	Mileage	10/27/2014	84.00	USD	Cash/Check	Internal	*Detail
<input type="checkbox"/>	Parking	10/27/2014	10.00	USD	Credit Card	Internal	*Detail
<input type="checkbox"/>	Entertainment/Client I	10/27/2014	75.00	USD	Credit Card	Internal	*Detail

Copy Selected Delete Selected Check For Errors New Expense **Add**

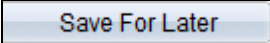
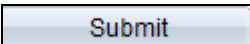
Totals					
Employee Expenses:	169.00	USD	Due Employee:	169.00	USD
Non-Reimbursable Expenses:	0.00	USD	Due Vendor:	0.00	USD
Prepaid Expenses:	0.00	USD			
Employee Credits:	0.00	USD			
Vendor Credits:	0.00	USD			
Cash Advances Applied:	0.00	USD			

[Definition of Totals](#) **Update Totals**

By checking this box, I declare under penalty of perjury and to the best of my knowledge, that all the expenditures being submitted were incurred by me while on official business for Baptist Health South Florida. I certify that this claim is just and in compliance with all said Baptist policies related to this type of reimbursement

Save For Later **Submit** [Expense Report Project Summary](#) [Printable View](#)

[Return to Travel and Expense Center](#)

Step	Action
35.	If you would like to save and return to the expense report at another time, click the Save For Later button. 
36.	Once you are prepared to submit the expense report, read the message to the right. Click the Compliance option to indicate you agree with and meet the terms. <input type="checkbox"/>
37.	Click the Submit button. 

Create Expense Report

Save Confirmation

Raphael Vera Report ID: 0000000153

Expense Report Totals			
Employee Expenses:	169.00 USD	Due Employee:	169.00 USD
Non-Reimbursable Expenses:	0.00 USD	Due Vendor:	0.00 USD
Prepaid Expenses:	0.00 USD	Definition of Totals	
Employee Credits:	0.00 USD		
Vendor Credits:	0.00 USD		
Cash Advances Applied:	0.00 USD		

Click OK to submit, or click Cancel to return to the expense report without submitting.

Step	Action
38.	Click the OK button. <input type="button" value="OK"/>
39.	Congratulations. You have created and submitted an expense report. End of Procedure.

Creating an Expense Report from a Travel Authorization

Navigation: Main Menu > FSCM > Employee Self Service > Travel and Expense Center > Click the Create link under Expense

Purpose: Use this transaction to practice creating an expense report from a travel authorization.

Note: Refer to BHSF Travel and Expense policies for specific requirements.

Step	Action
1.	Use this page to search for an existing expense report or add a new expense report. In this example, you will create a new expense report.

Expense Report

Enter any information you have and click Search. Leave fields blank for a list of all values.

Search by: begins with

[Advanced Search](#)

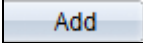
[Find an Existing Value](#) | [Add a New Value](#)

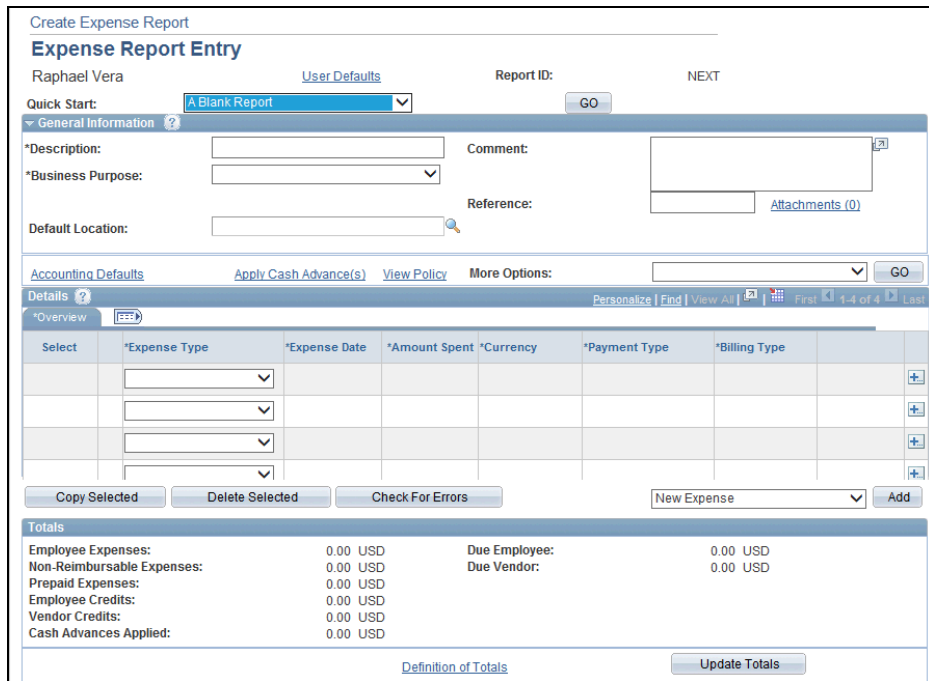
Step	Action
2.	Click the Add a New Value tab. <input type="button" value="Add a New Value"/>


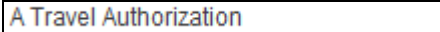

Expense Report

Empl ID:

[Find an Existing Value](#) | [Add a New Value](#)

Step	Action
3.	Enter the desired information into the Empl ID field.
4.	If you do not know your Employee ID, you can click the Search button to search and select your ID number.
5.	Click the Add button. 



Step	Action
6.	Click the button to the right of the Quick Start field. 
7.	There are several options when creating an expense report, including: <ul style="list-style-type: none"> - A Template: Select to create an expense report from an existing template. - A Travel Authorization: Select to create an expense report based on a travel authorization. - Existing Report: Select to copy expenses from an existing expense report. - Entries From My Wallet: Select to access the My Wallet page, where you can select transactions to add to the expense report. <p>In this example, you will create an expense report for a travel authorization.</p>
8.	Click the A Travel Authorization list item. 
9.	Click the GO button. 

Create Expense Report

Populate From A Travel Authorization

Raphael Vera Report ID: NEXT

From Date: To:

Travel Authorizations						
	Travel Auth Description	Authorization ID	Date From	Date To	Amount	Currency
<input type="button" value="Select"/>	Trip to Miami	0000000042	10/26/2014	10/30/2014	50.00	USD
<input type="button" value="Select"/>	Chicago Trip	0000000041	11/25/2014	11/28/2014	519.97	USD
<input type="button" value="Select"/>	NY Accounts Payable Lecture	0000000040	11/11/2014	11/12/2014	574.95	USD
<input type="button" value="Select"/>	Accounts Payable Retreat	0000000039	10/31/2014	11/03/2014	1,602.92	USD
<input type="button" value="Select"/>	Chicago Trip	0000000038	10/26/2014	10/31/2014	56.00	USD
<input type="button" value="Select"/>	Test	0000000037	10/24/2014	10/28/2014	1,500.00	USD

[Return to Expense Report Entry](#)

Step	Action
10.	<p>Click the Select button to the left of the appropriate Travel Authorization.</p> <p>Note, you must select a travel authorization for a past trip.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin: 5px;"> <input type="button" value="Select"/> </div>

Create Expense Report

Expense Report Entry

Raphael Vera Report ID: NEXT

[User Defaults](#)

General Information

*Description: Comment:

*Business Purpose: Reference: [Attachments \(0\)](#)

Default Location: Authorization ID:

[Accounting Defaults](#) [Apply Cash Advance\(s\)](#) [View Policy](#) **More Options:**

Details Personalize | Find | View All | First 1 of 1 Last

*Overview

Select	*Expense Type	*Expense Date	*Amount Spent	*Currency	*Payment Type	*Billing Type	
<input type="checkbox"/>	Mileage	10/26/2014 <input type="button" value="BT"/>	56.00	USD	Cash/Check	Internal	*Detail <input type="button" value="+"/>

Totals

Employee Expenses:	56.00 USD	Due Employee:	56.00 USD
Non-Reimbursable Expenses:	0.00 USD	Due Vendor:	0.00 USD
Prepaid Expenses:	0.00 USD		
Employee Credits:	0.00 USD		
Vendor Credits:	0.00 USD		
Cash Advances Applied:	0.00 USD		

Step	Action
11.	<p>Click the Detail link to view details regarding the expense incurred.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin: 5px;"> *Detail </div>

Step	Action
12.	<p>Use the Expense Detail page to review the expenses for the selected line.</p> <p>The information on this page is populated with the information provided in the Travel Authorization for the trip. Should your actual expenses differ from the Travel Authorization, make any edits on this page.</p> <p>For example, if you drove 150 miles instead of 100 miles, update the Miles field.</p>

Create Expense Report

Expense Detail for Mileage (Line 1)

Raphael Vera Report ID: NEXT

About This Expense ?

*Expense Date: 10/26/2014 Add

*Payment Type: Cash/Check No Receipt

*Billing Type: Internal Non-Reimbursable

*Miles: 100 x 0.5600

Description: From Kanas City

*Amount Spent: 56.00

*Currency: USD

*Exchange Rate: 1.00000000

Default Rate

Reimbursement Amt: 56.00 USD

Exception Comments ?

Location Amount:

No Receipt:

[Accounting Detail](#)

[Return to Expense Report](#)

Step	Action
13.	<p>Click the Return to Expense Report link.</p> <p>Return to Expense Report</p>

Create Expense Report

Expense Report Entry

Raphael Vera [User Defaults](#) Report ID: NEXT

General Information

*Description: Chicago Trip Comment:

*Business Purpose: Off-Site Meeting Reference: Attachments (0)

Default Location:

Authorization ID: 0000000038

[Accounting Defaults](#) [Apply Cash Advance\(s\)](#) [View Policy](#) More Options:

Details

*Overview

Select	*Expense Type	*Expense Date	*Amount Spent	*Currency	*Payment Type	*Billing Type	
<input type="checkbox"/>	Mileage	10/26/2014	56.00	USD	Cash/Check	Internal	*Detail

Totals

Employee Expenses:	56.00 USD	Due Employee:	56.00 USD
Non-Reimbursable Expenses:	0.00 USD	Due Vendor:	0.00 USD
Prepaid Expenses:	0.00 USD		
Employee Credits:	0.00 USD		
Vendor Credits:	0.00 USD		
Cash Advances Applied:	0.00 USD		

[Definition of Totals](#)

Step	Action
14.	Click the Check For Errors button. <input type="button" value="Check For Errors"/>
15.	After adding all expenses and checking for errors, you need to attach your receipts to the report. Click the Attachment link to attach your receipts. In this example, there are no receipts to attach as you will never have a receipt for mileage.
16.	Scroll down the page.

Details

*Overview

Select	*Expense Type	*Expense Date	*Amount Spent	*Currency	*Payment Type	*Billing Type	
<input type="checkbox"/>	Mileage	10/26/2014	56.00	USD	Cash/Check	Internal	*Detail

Totals

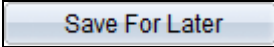
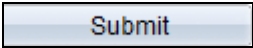
Employee Expenses:	56.00 USD	Due Employee:	56.00 USD
Non-Reimbursable Expenses:	0.00 USD	Due Vendor:	0.00 USD
Prepaid Expenses:	0.00 USD		
Employee Credits:	0.00 USD		
Vendor Credits:	0.00 USD		
Cash Advances Applied:	0.00 USD		

[Definition of Totals](#)

By checking this box, I declare under penalty of perjury and to the best of my knowledge, that all the expenditures being submitted were incurred by me while on official business for Baptist Health South Florida. I certify that this claim is just and in compliance with all said Baptist policies related to this type of reimbursement

[Expense Report Project Summary](#) [Printable View](#)

[Return to Travel and Expense Center](#)

Step	Action
17.	If you would like to save and return to the expense report at another time, click the Save For Later button. 
18.	Once you are prepared to submit the expense report, read the message to the right. Click the Compliance option to indicate you agree with and meet the terms. <input type="checkbox"/>
19.	Click the Submit button. 

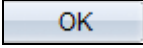
Create Expense Report

Save Confirmation

Raphael Vera Report ID: 0000000164

Expense Report Totals			
Employee Expenses:	56.00 USD	Due Employee:	56.00 USD
Non-Reimbursable Expenses:	0.00 USD	Due Vendor:	0.00 USD
Prepaid Expenses:	0.00 USD	Definition of Totals	
Employee Credits:	0.00 USD		
Vendor Credits:	0.00 USD		
Cash Advances Applied:	0.00 USD		

Click OK to submit, or click Cancel to return to the expense report without submitting.

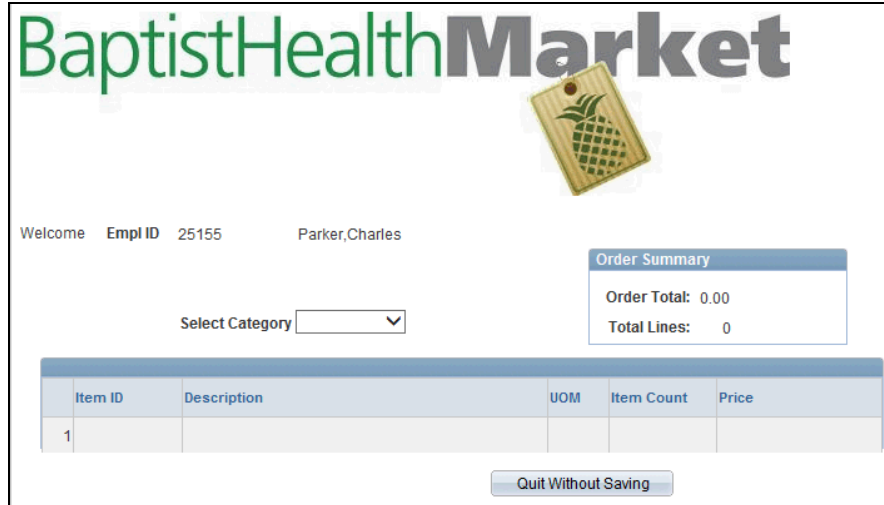
Step	Action
20.	Click the OK button. 
21.	Congratulations. You have created an expense report from a travel authorization. End of Procedure.



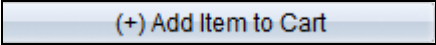
Baptist Health Market

Placing an Order

Navigation: Main Menu > FSCM > Self Service > Baptist Health Market > Baptist Health Market

Purpose: Use this transaction to practice placing an order in Baptist Health Market.



Step	Action
1.	Click the button to the right of the Select Category field. 
2.	Click the appropriate Category list item.
3.	Note, a UOM (or unit of measure) is assigned to all inventory items and is a measure of quantity. For example, you may purchase an item by the case and within each case, there are 50 of that item (e.g. 50 diapers per case). In this example, the UOM is EA meaning each. A UOM of EA means there is only one of that item.
4.	Click the button to the right of the Quantity field. 
5.	Click the appropriate Quantity list item.
6.	Click the (+) Add Item to Cart button. 
7.	Once you add an item, you are taken to your cart. In your cart, you can see your updated Order Summary including your order total.

BaptistHealthMarket

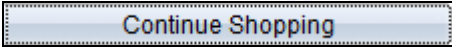
Welcome Empl ID 25155 Parker,Charles

Order Summary
Order Total 25.48
Total Lines 1

Item ID	Description	Quantity	Price	Total Amount
1 B100	ART OF NURSING BOOK	1	25.48	25.48

Continue Shopping Checkout

Cart | [Employee ID Error](#)

Step	Action
8.	Click the Continue Shopping button. 

BaptistHealthMarket



Welcome Empl ID 25155 Parker,Charles

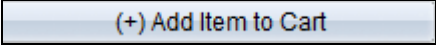
Order Summary
Order Total: 25.48
Total Lines: 1

Select Category

Item ID	Description	UOM	Item Count	Price
1				

Go To Cart Quit Without Saving

Step	Action
9.	Click the button to the right of the Select Category field. 
10.	Click the appropriate Category list item.
11.	Notice, the UOM for diapers is case. Refer to the item count to determine the number of diapers in each case.
12.	Click the button to the right of the Quantity field. 
13.	Click the appropriate Quantity list item.

Step	Action
14.	Click the (+) Add Item to Cart button. 
15.	Notice your Order Summary has been updated to reflect the new item.



BaptistHealthMarket

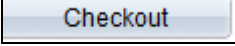
Welcome Empl ID 25155 Parker, Charles

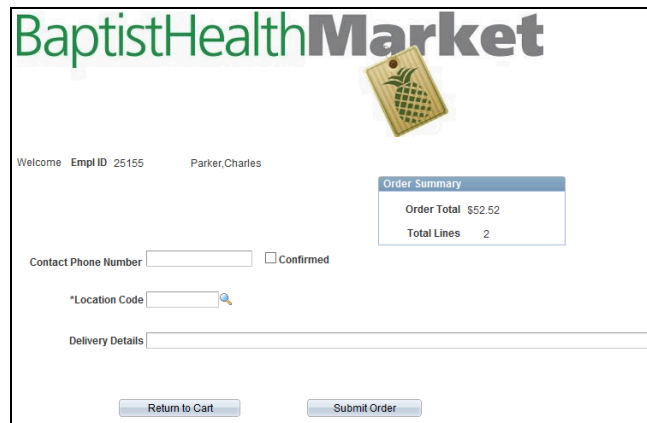
Order Summary

Order Total	52.52
Total Lines	2

Item ID	Description	Quantity	Price	Total Amount
1 B100	ART OF NURSING BOOK	1	25.48	25.48
2 1088	Pampers Size 1 - Small (8-14 lbs)	2	13.52	27.04

Continue Shopping Checkout

Step	Action
16.	Once you have added all items to your cart, click the Checkout button. 




BaptistHealthMarket

Welcome Empl ID 25155 Parker, Charles

Order Summary


Order Total	\$52.52
Total Lines	2

Contact Phone Number Confirmed

*Location Code 

Delivery Details

Return to Cart Submit Order

Step	Action
17.	Enter the desired information into the Contact Phone Number field.
18.	Click the Confirmed option. <input type="checkbox"/>
19.	Click the Look up Location Code (Alt+5) button. 

Look Up Location Code

Search by: Delivery ID begins with

Look Up Cancel [Advanced Lookup](#)

Search Results

View 100 First 1-47 of 47 Last

Delivery ID	Description
100AS	ASB Building (IT / Hyperion / Call Center)
100AT	Atrium
100BF	BHSF Foundation
100CC	Corp - Business Support Call Center
100CO	Corporate Office
100DC	Doral Data Center
100KB	Kendall Breeze
100P1	Park Place I
100P2	Park Place II
100RE	Real Estate Sunset Office
100SI	San Ignacio
100TC	Town & Country BLDG (BSB)
190GS	BHSF General Surgery

Step	Action
20.	Click the appropriate Delivery ID link.



Welcome Empl ID 25155 Parker, Charles

Order Summary

Order Total \$52.52

Total Lines 2

Contact Phone Number Confirmed

*Location Code Town & Country BLDG (BSB)

Delivery Details

[Return to Cart](#) [Submit Order](#)

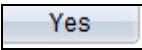
Step	Action
21.	Enter the desired information into the Delivery Details field.
22.	Click the Submit Order button.

[Submit Order](#)

Message

Are you sure you want to submit this order? (0,0)

[Yes](#) [No](#)

Step	Action
23.	Click the Yes button. 
24.	Note, only unopened items may be returned within 90 days of the order date.
25.	Congratulations. You have placed an order in the Baptist Health Market. End of Procedure.

Returning Merchandise

Navigation: Main Menu > FSCM > Self Service > Baptist Health Market > Return Merchandise

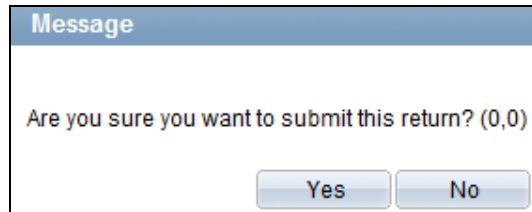
Purpose: Use this transaction to practice returning an item(s) you purchased from Baptist Health Market.

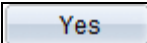
Order No	Line Number	Item ID	Description	Qty Ordered	Previously Returned	Qty To Return
EP00000025	1	B100	The Art of Nursing	1	0	<input type="text" value="0"/>
EP00000025	2	1088	Pampers Size 1 - Small (8-14 lbs)	2	0	<input type="text" value="0"/>

Step	Action
1.	Click the button to the right of the Qty To Return field to the right of the item(s) you wish to return. <input type="text" value="0"/>
2.	Click the appropriate Quantity list item.
3.	Click the Review to Finalize button. <input type="button" value="Review to Finalize"/>

Order No	Line Number	Item SetID	Item ID	Description	Quantity	Total Amount
EP00000025		2 SHARE	1088	Pampers Size 1 - Small (8-14 lbs)	2	27.04

Step	Action
4.	Click the Complete Request button. <input type="button" value="Complete Request"/>



Step	Action
5.	Click the Yes button. 
6.	Once the transaction is completed and a return number assigned, print this page and attach it to the item(s) being returned. Next, take the product(s) to the supply chain area in your location so that the driver can bring the items back to the CDSC.
7.	Congratulations. You have returned an item from Baptist Health Market. End of Procedure.