PeopleSoft 9.1
Employee Self Service

Reference Guide

December 2, 2014

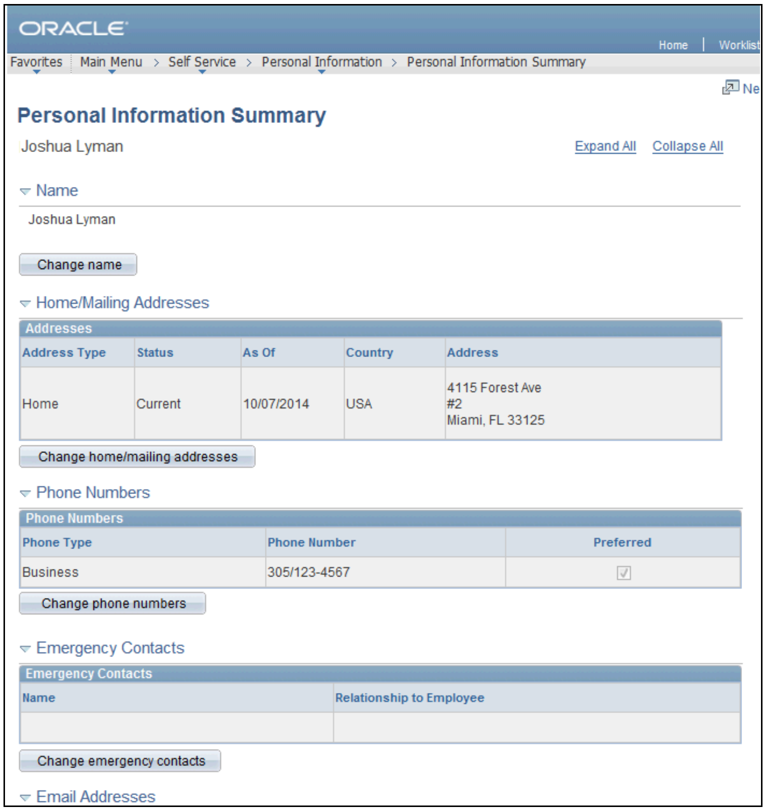
Table of Contents

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.



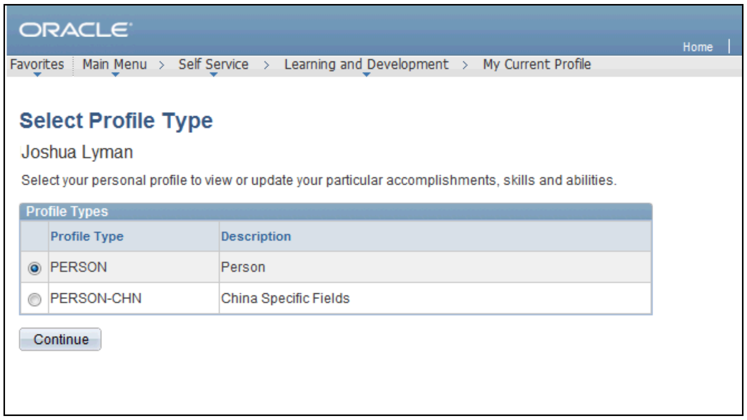
Step	Action
1.	Use the Personal Information Summary page to review your personal information currently on file. This page includes such information as: Home/Mailing Addresses, Phone Numbers, Email Addresses, Instant Message IDs, Marital Status, Ethnic Groups, and Employee Information. Scroll down to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

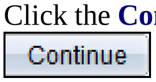
Step	Action
2.	The Employee Information section displays information you provided when you were hired. If any of the information in this section is incorrect, contact the Human Resources Department.
3.	**Congratulations.** You have viewed your personal profile information. **End of Procedure.**

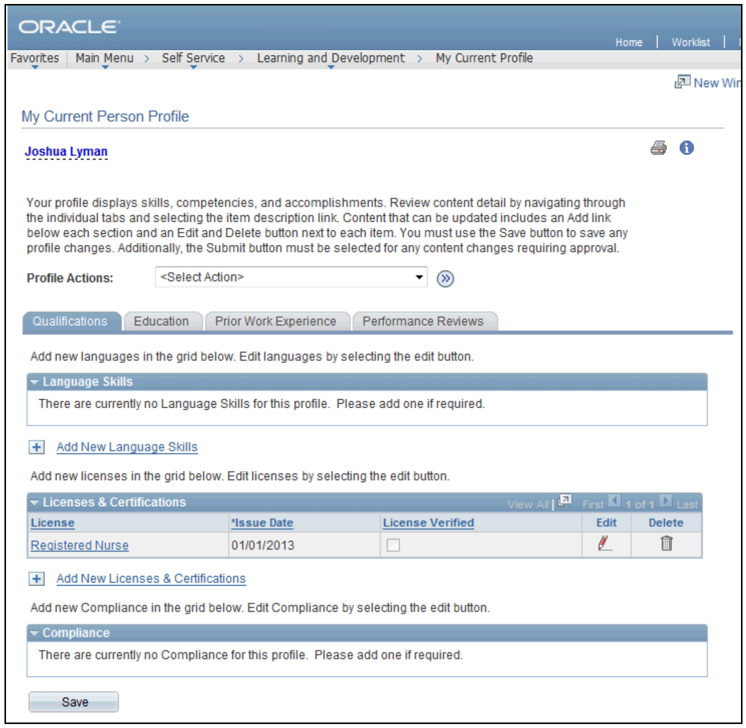
Updating Personal Profile Information - Licenses, Certifications, and Experience

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

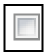
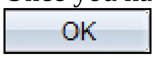
Purpose: Use this transaction to practice updating the following in your personal profile: licenses, certifications, and experience.



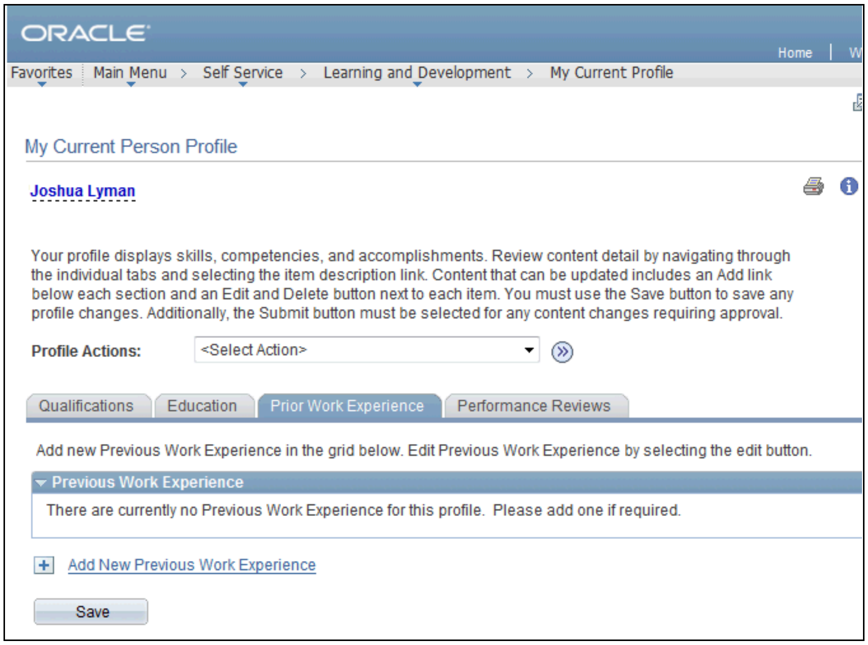
Step	Action
1.	Click the **Continue** button. 



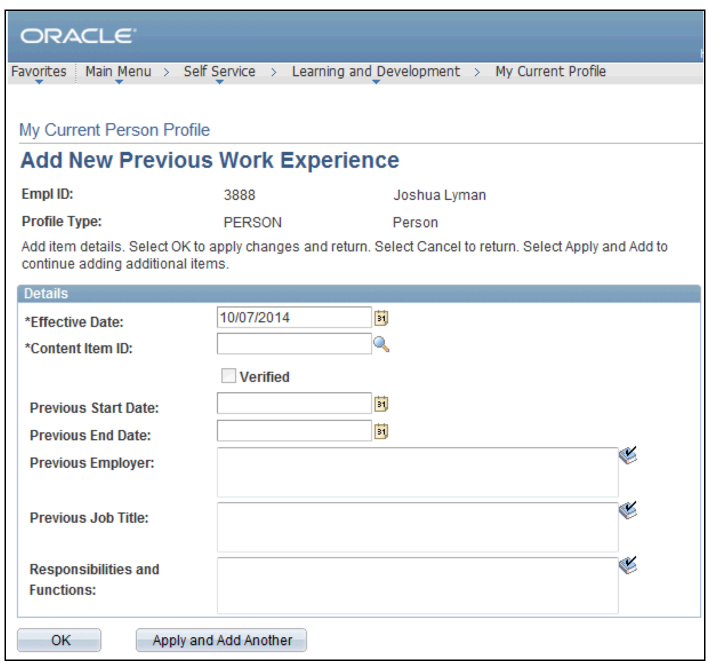
Step	Action
2.	Use the My Current Person Profile page to update your personal information including: License and Certifications, Education, and Prior Work Experience. In this example, you will update license and certification, and prior work experience information.
3.	Click the **Edit** button to update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

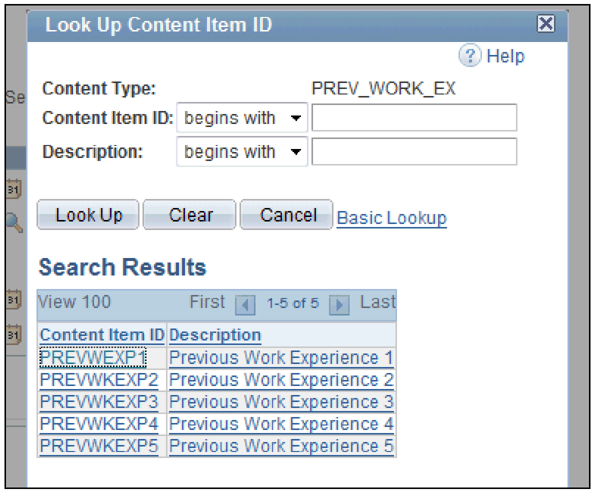
Step	Action
7.	Next, you are going to update your work experience prior to joining Baptist Health.
8.	Click the **Prior Work Experience** tab.



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



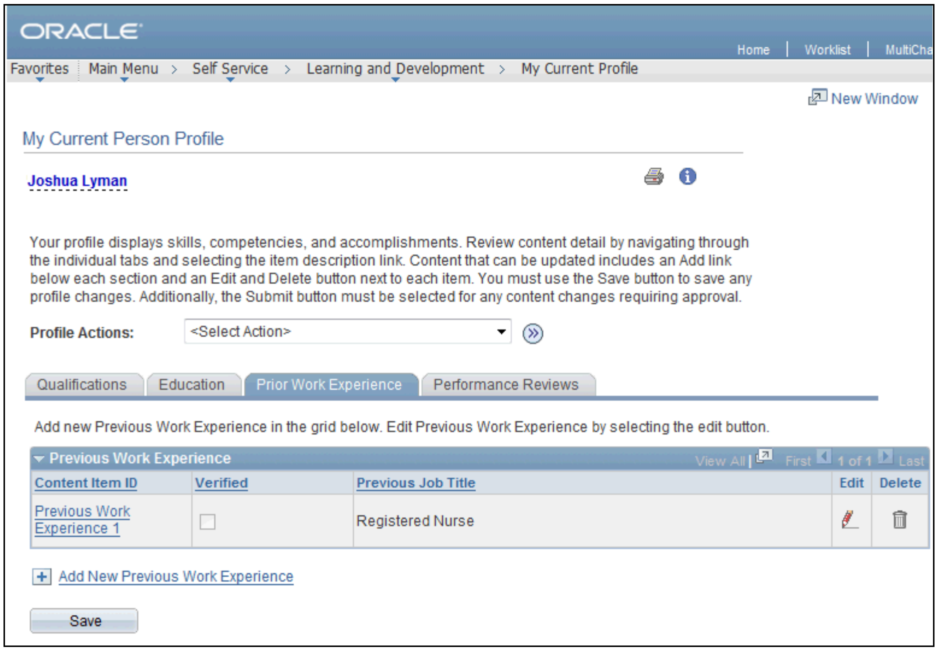
Step	Action
10.	Click the **Look up Content Item ID (Alt+5)** button. 



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. OK

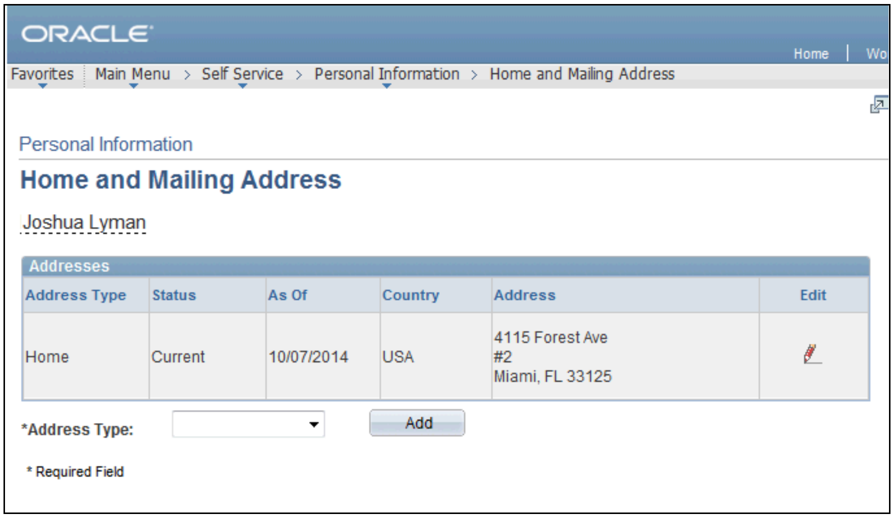


Step	Action
17.	Click the **Save** button. Save
18.	**Congratulations.** You have updated the following in your personal profile: licenses, certifications, and experience. **End of Procedure.**

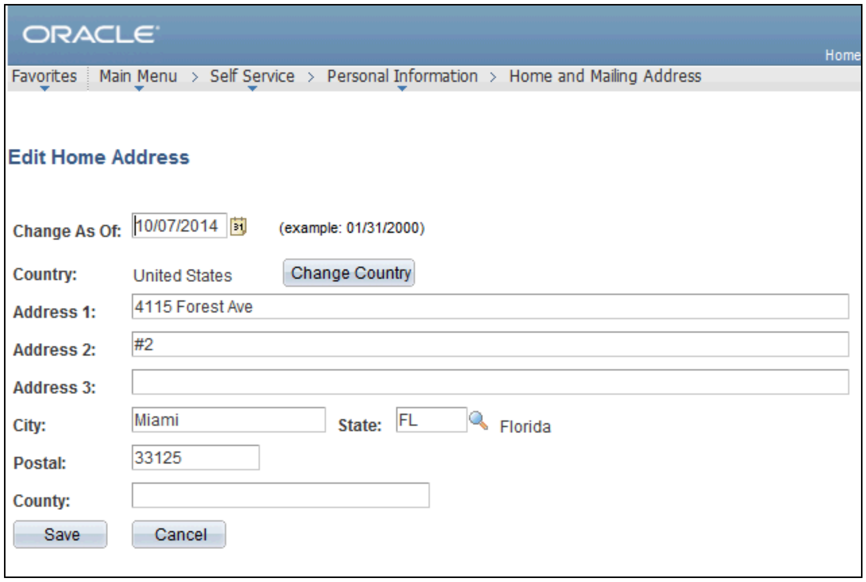
Updating Personal Profile Information - Address

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

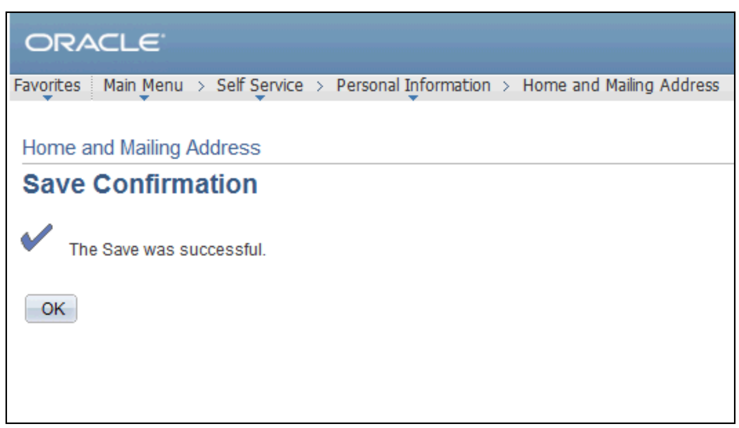
Purpose: Use this transaction to practice updating your personal profile information. In this example, you will update your home address.



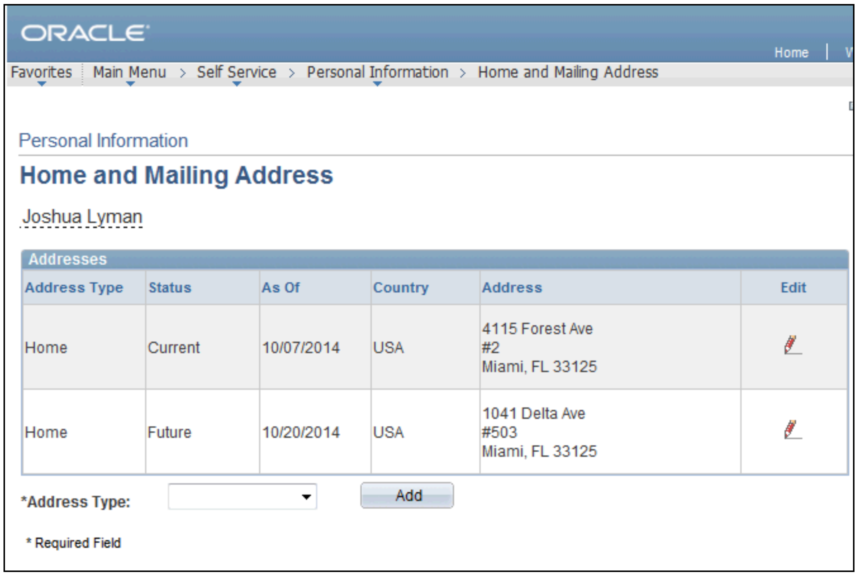
Step	Action
1.	Use the Home and Mailing Address page to update current addresses and to add new addresses. In this example, you will edit a current address.
2.	Click the **Edit** button to the right of the address you want to update. 



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. Save



Step	Action
8.	Click the **OK** button. OK

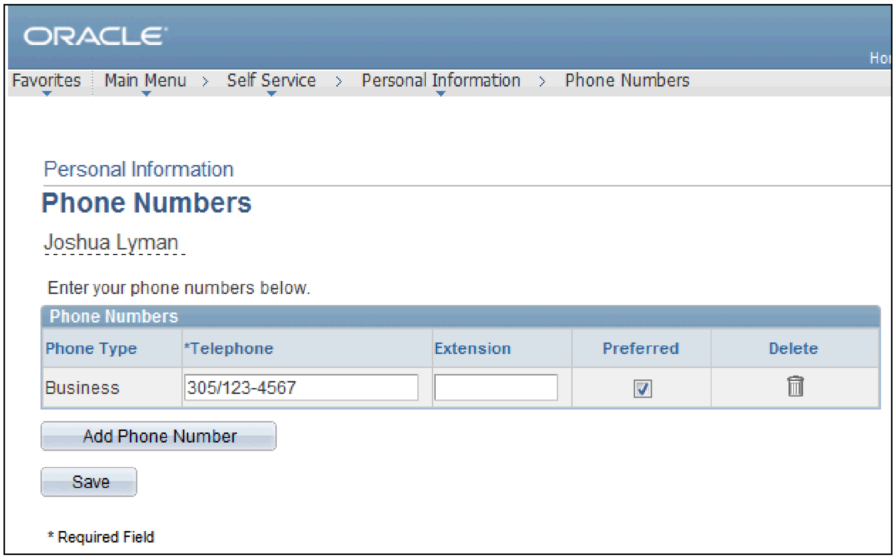


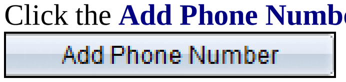
Step	Action
9.	Notice, you're current and future address will appear here until the effective date has passed for the new address.
10.	**Congratulations.** You have updated your address in your personal profile. **End of Procedure.**

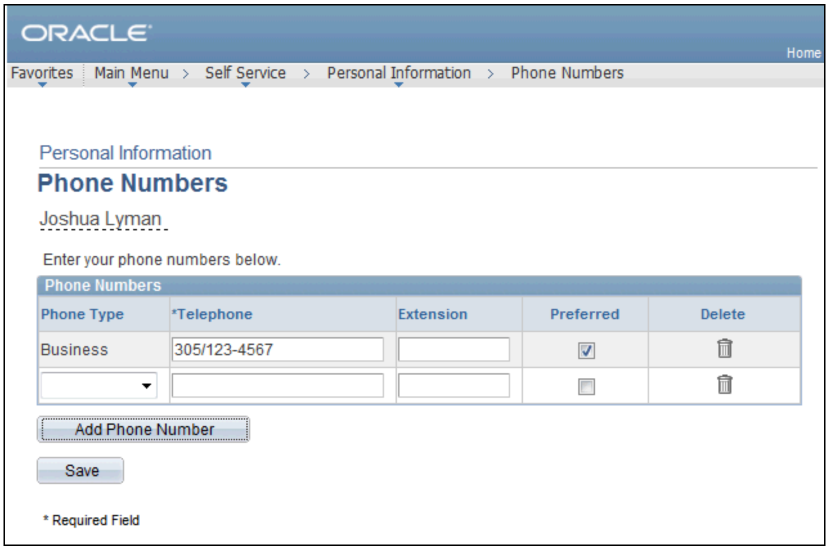
Updating Personal Profile Information - Phone Numbers

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

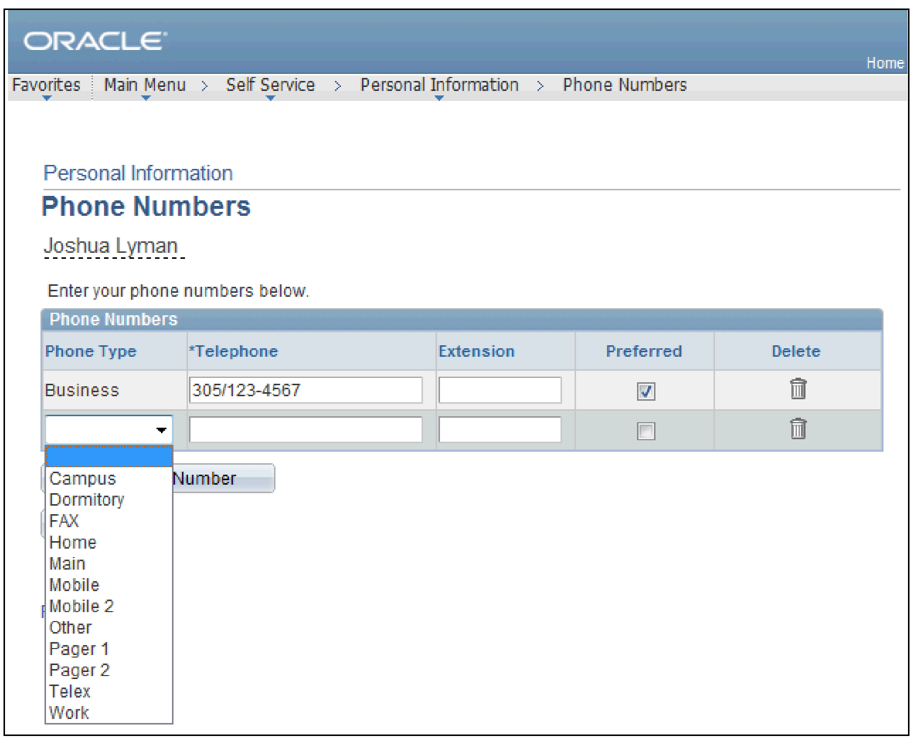
Purpose: Use this transaction to practice updating your personal profile information. In this example, you will update your phone number.



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. 

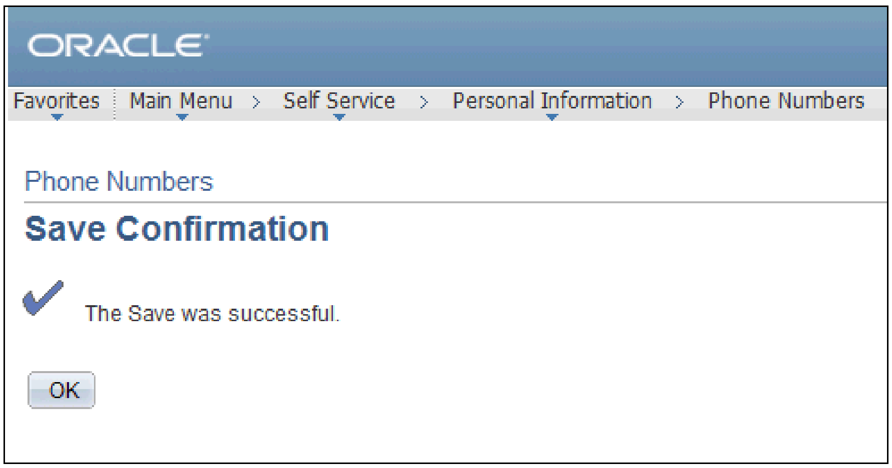


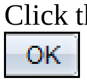
Step	Action
3.	Click the button to the right of the **Phone Type** field. 



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. 

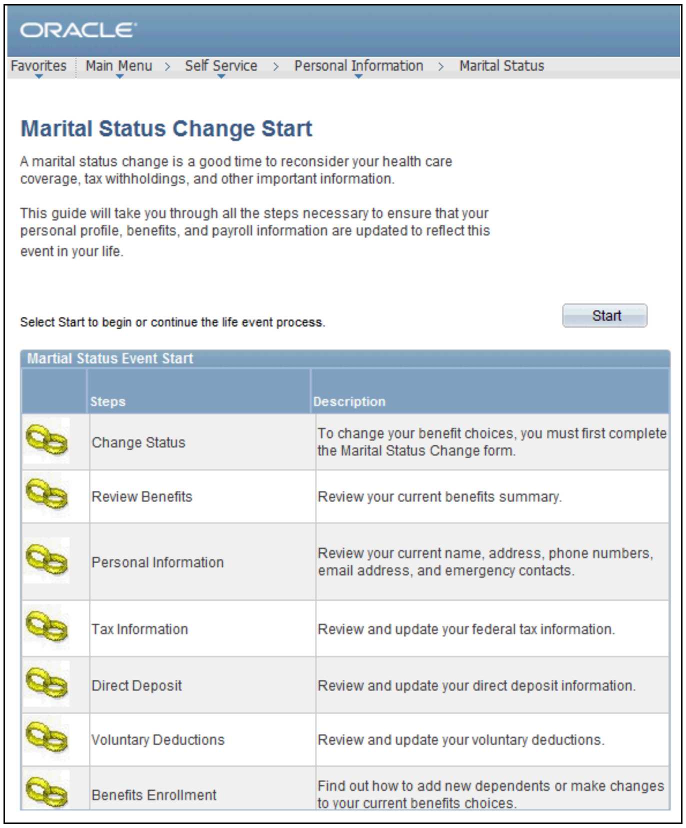


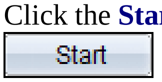
Step	Action
9.	Click the **OK** button. 
10.	**Congratulations.** You have updated your phone number in your personal profile. **End of Procedure.**

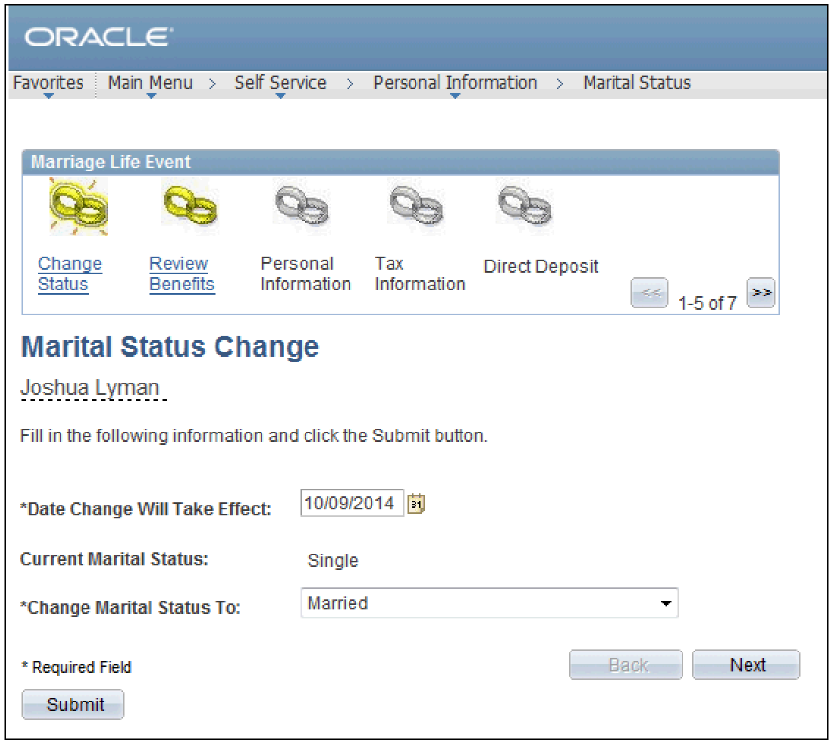
Updating Personal Profile Information - Marital Status

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

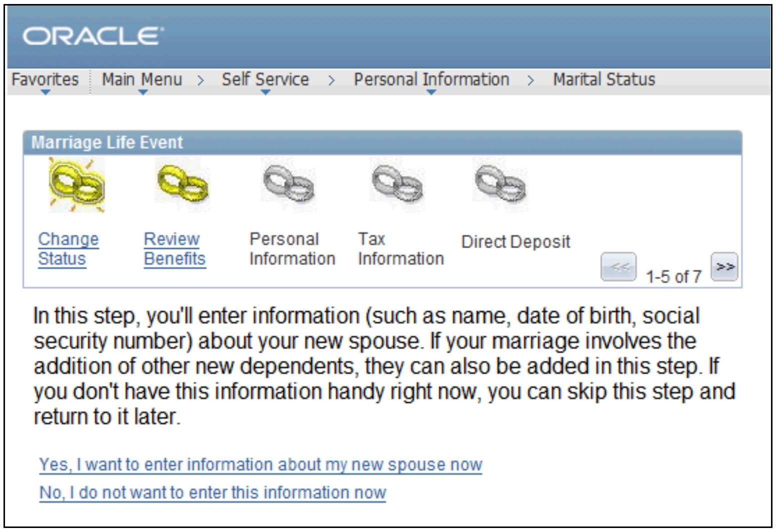
Purpose: Use this transaction to practice updating your personal information. In this example, you will update marital status.



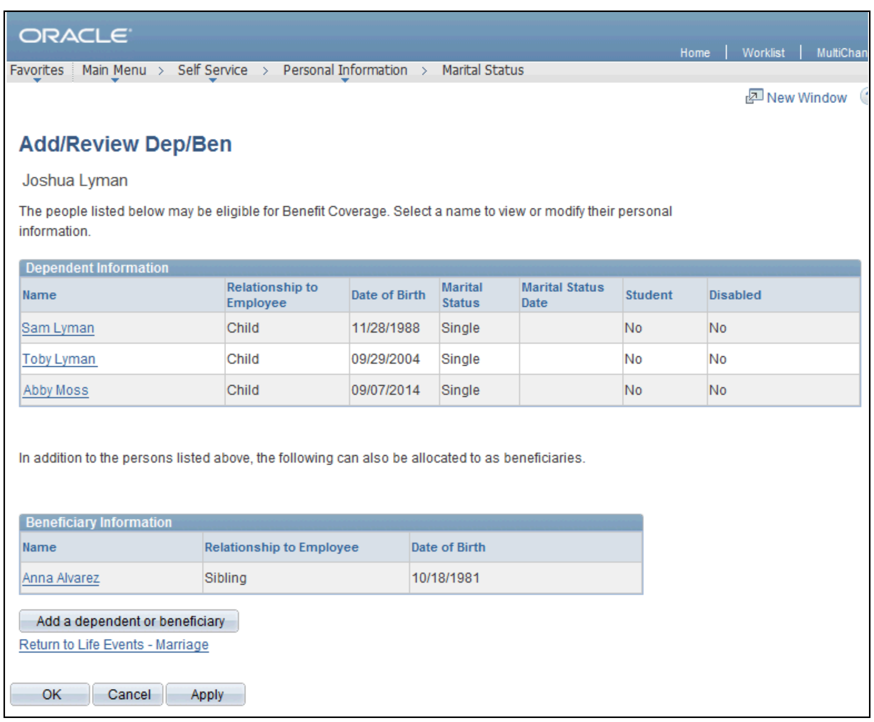
Step	Action
1.	To change your marital status, you will be taken through a series of pages by the system. These pages will allow you to change your status, review your current benefits, your personal information, your tax information, direct deposit, and voluntary deductions. Finally, a change in marital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

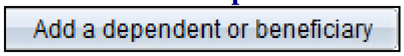


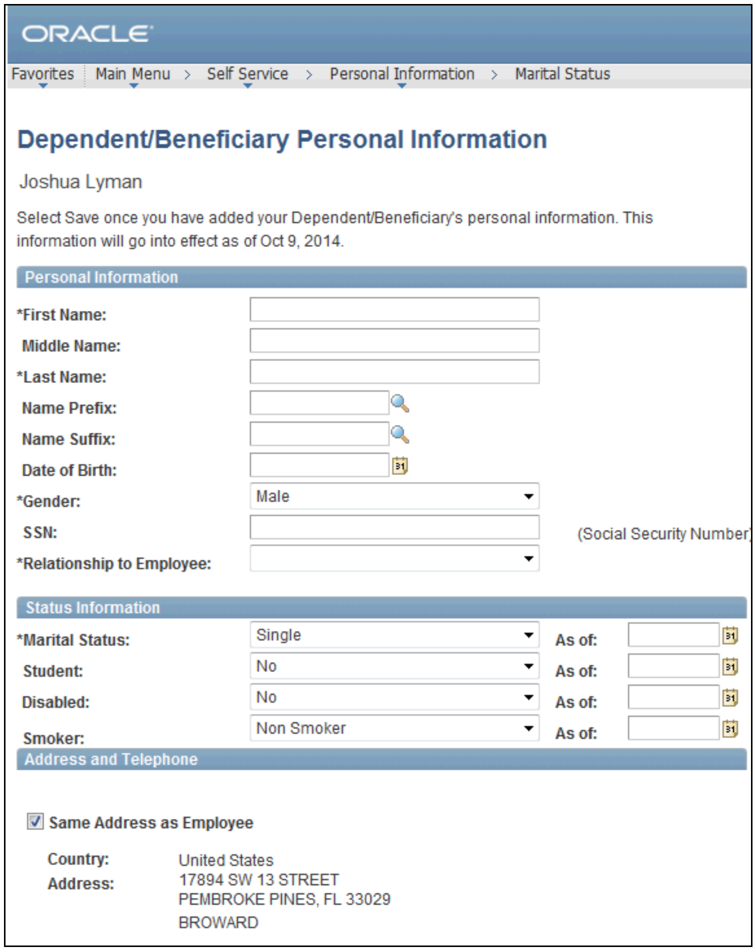
Step	Action
3.	The system guides you through the required sub-steps or action items to complete the life event. An activity guide pagelet, here the Marriage Life Event pagelet, lists all the steps you need to complete. The status of each action item in the pagelet changes as you navigate through the 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. When you complete a life event, the activity guide pagelet provides a visual indication that all the action items are complete.
4.	Enter the desired information into the **Date Change Will Take Effect** field.
5.	Select the appropriate **Change Marital Status To** item. In this example, marital status is changing from Single to Married.
6.	Click the **Submit** button. Submit



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.

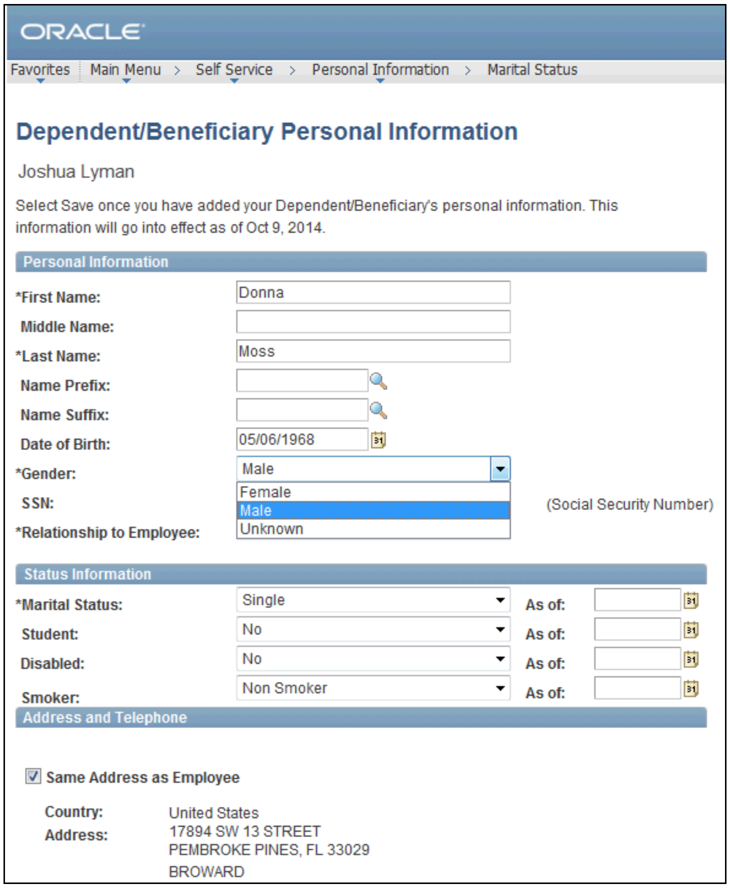


Step	Action
9.	Click the **Add a dependent or beneficiary** button. 

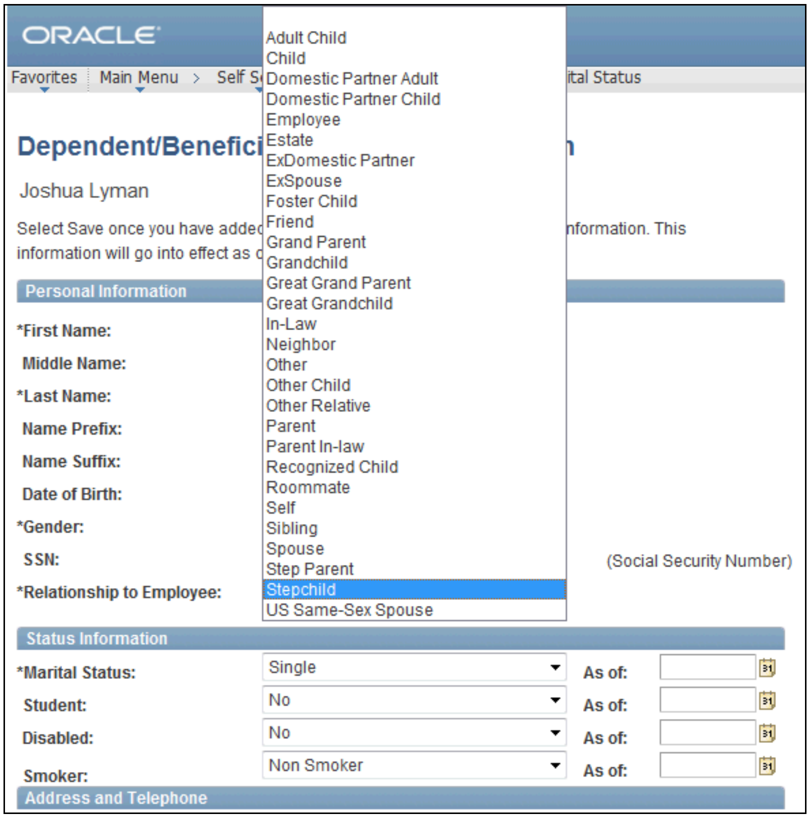


Step	Action
10.	Use the Dependent/Beneficiary Personal Information page to enter your new spouse's information.
11.	Enter the desired information into the **First Name** field.
12.	Enter the desired information into the **Last Name** field.
13.	Enter the desired information in the **Date of Birth** field.

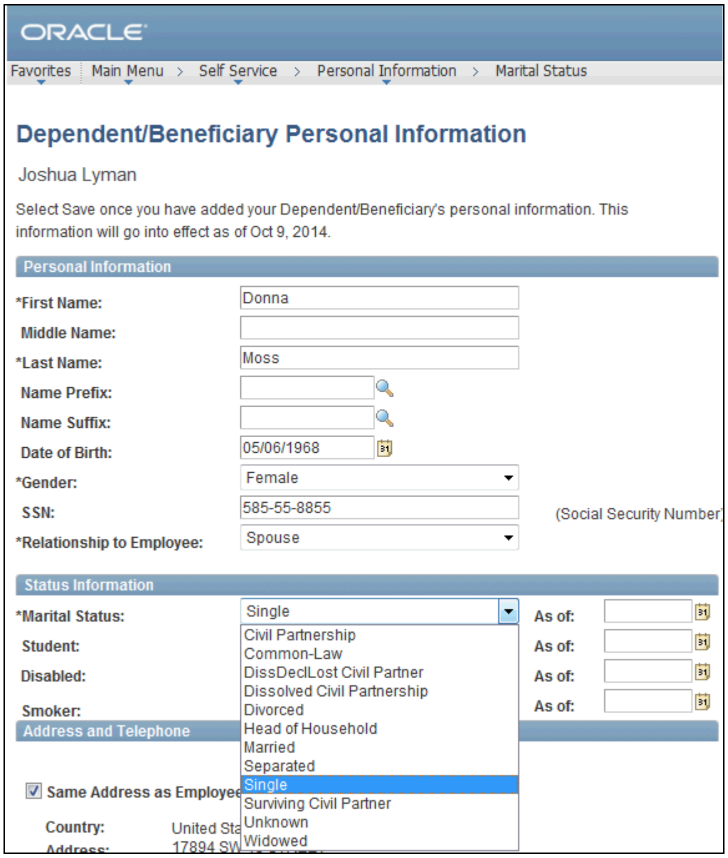
Step	Action
14.	Click the button to the right of the **Gender** field. 



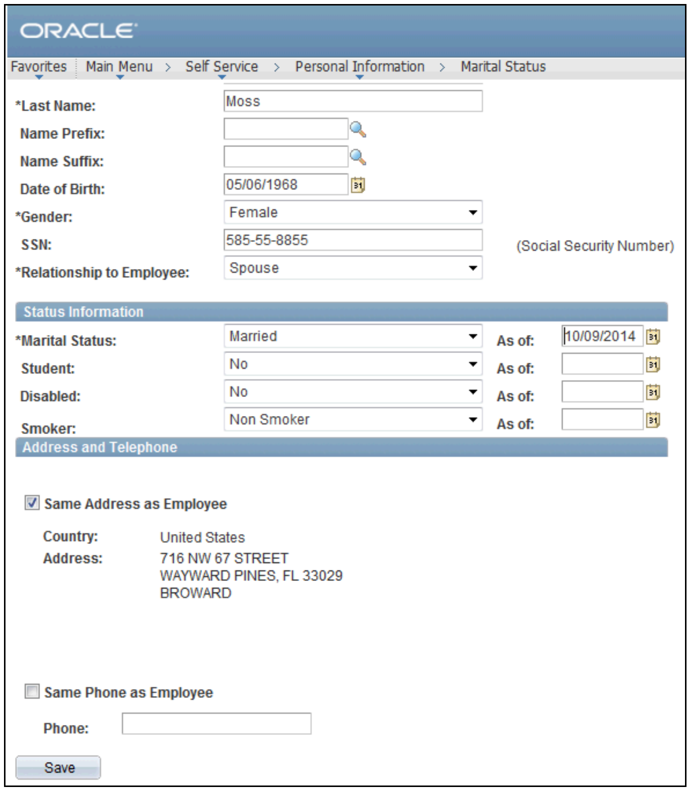
Step	Action
15.	Click the appropriate **Gender** list item.
16.	If you do not know the Social Security Number, or your spouse does not have one, you can leave this blank. After saving their information, you will be asked for a reason why there is no Social Security Number listed.
17.	Enter the desired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

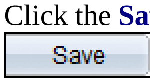


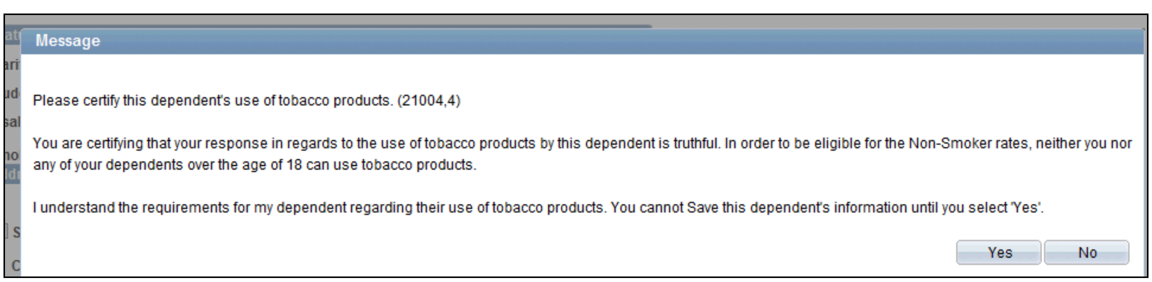
Step	Action
19.	Click the appropriate **Relationship to Employee** list item.
20.	Click the button to the right of the **Marital Status** field. 

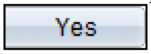


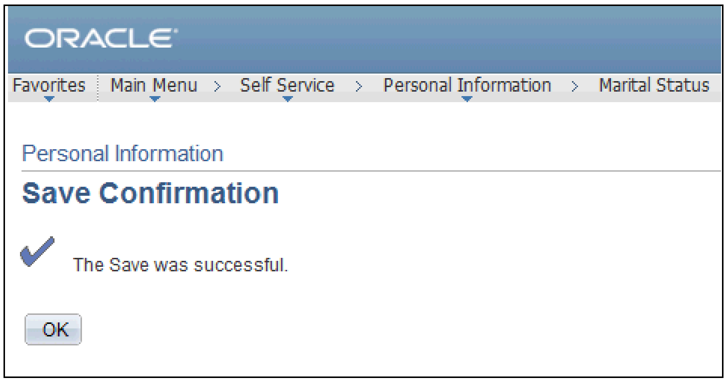
Step	Action
21.	Click the appropriate **Marital Status** list item.
22.	Enter the appropriate information in the **As Of** field.
23.	Notice, the Smoker status defaults to Non Smoker. You are responsible for updating this field if your spouse/dependent does smoke. In this example, you do not need to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



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. 

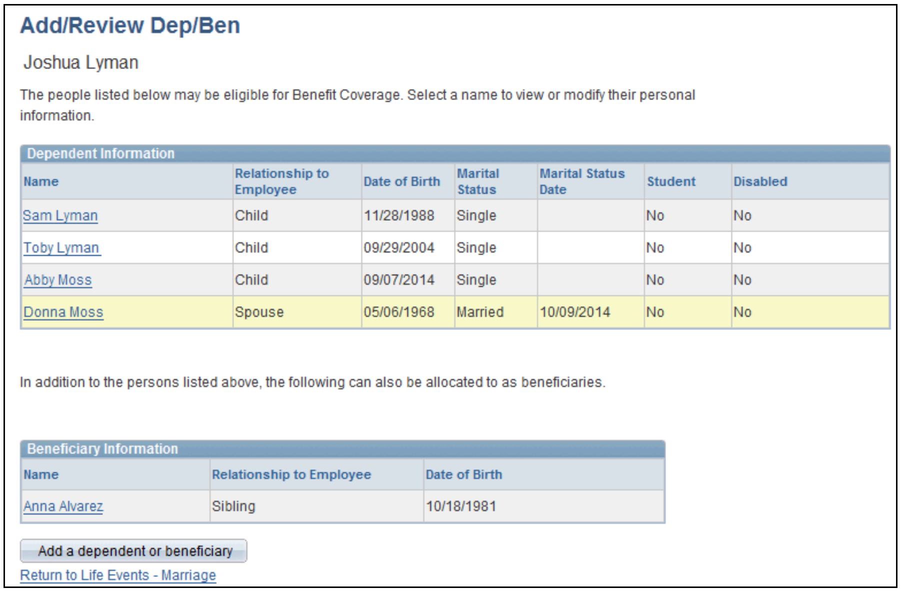


Step	Action
28.	Click the Yes button if the selected Smoker status is accurate. Click No to return and make any necessary edits. In this example, click the **Yes** button. 



Step	Action
29.	Click the **OK** button. 

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


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.

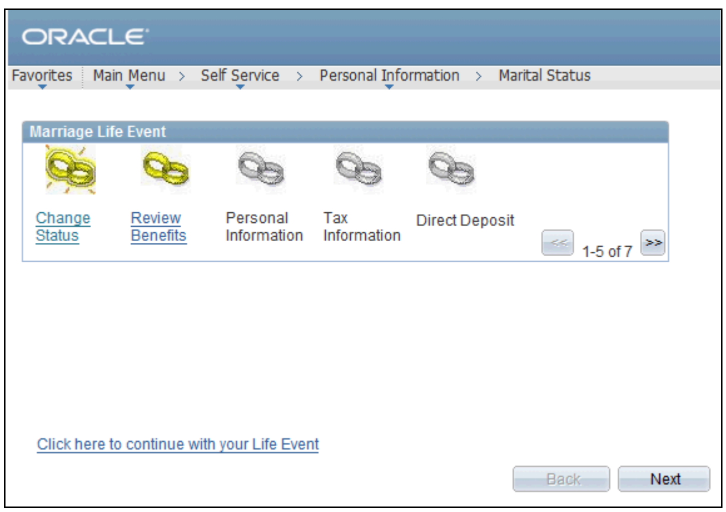
Beneficiary Information

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

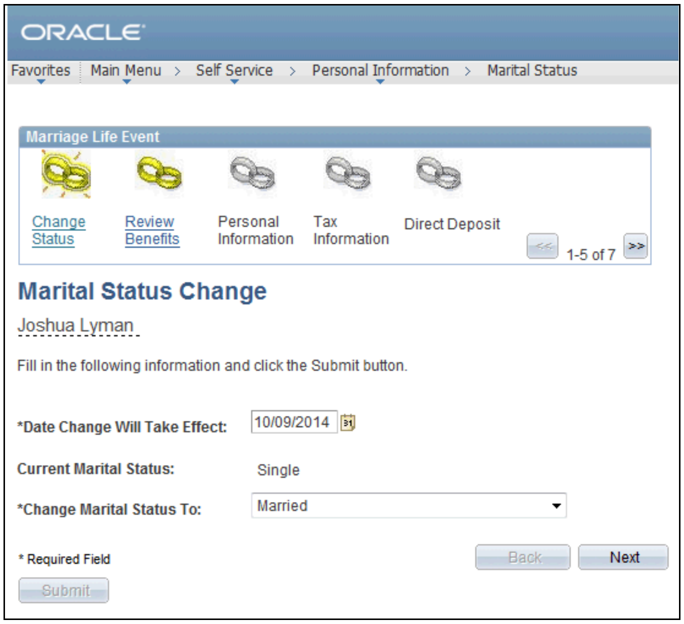
Add a dependent or beneficiary

Return to Life Events - Marriage

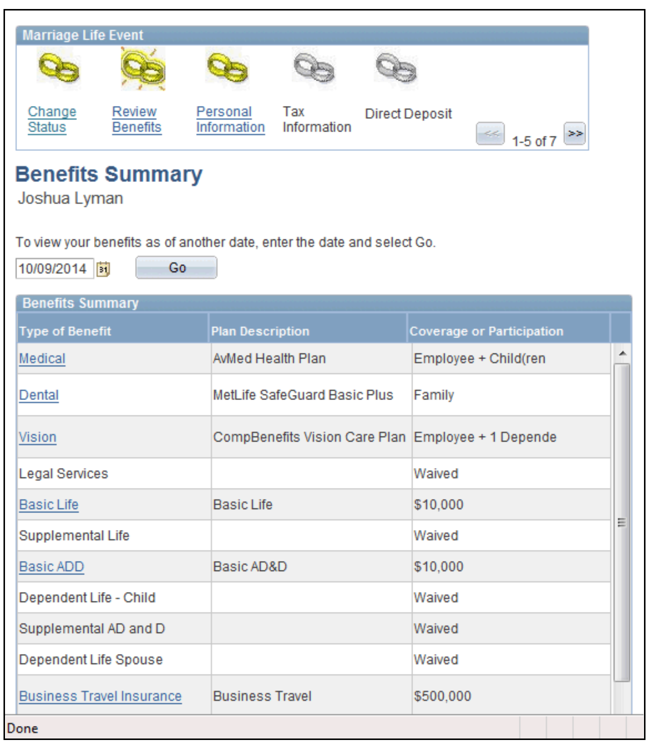
Step	Action
31.	Click the **Return to Life Events - Marriage** link.



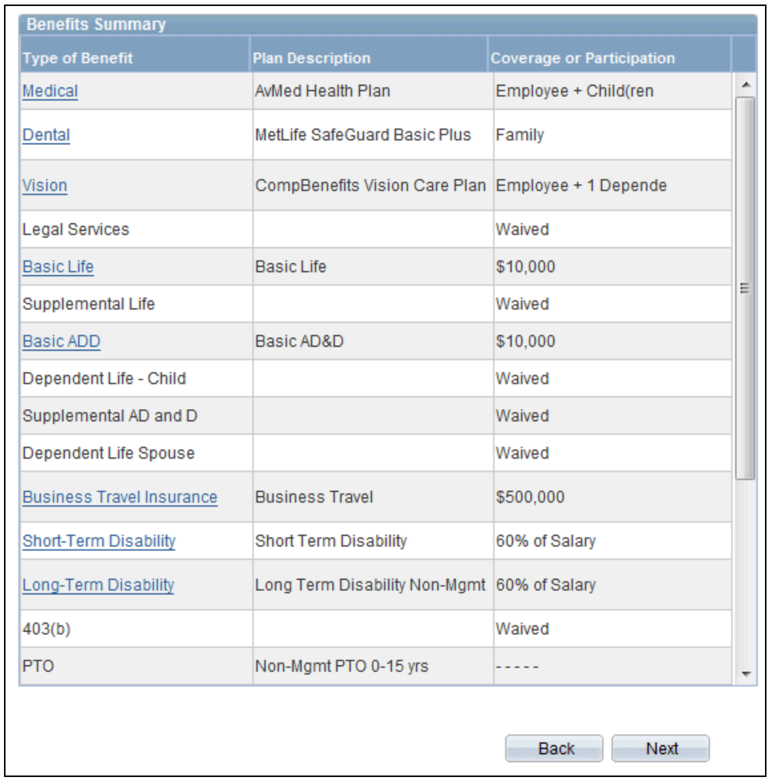
Step	Action
32.	Click the **Click here to continue with your Life Event** link.



Step	Action
33.	Click the **Next** button. Next

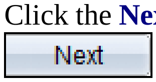


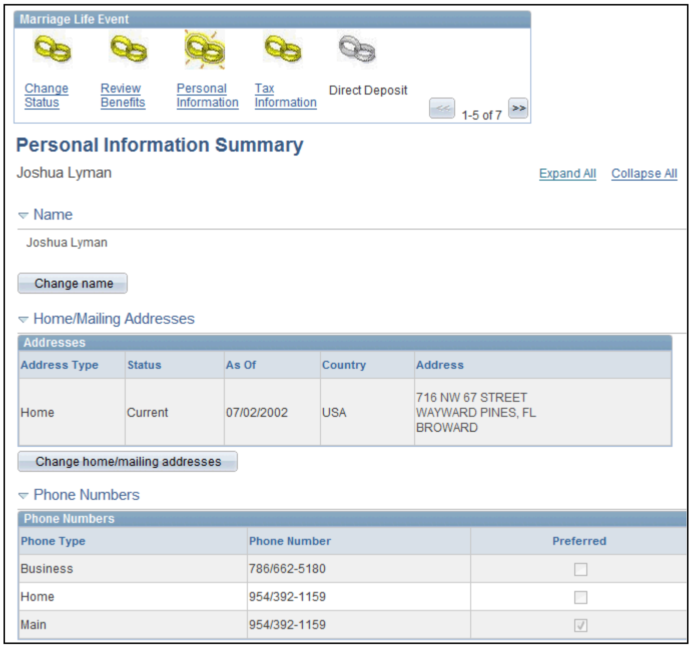
Step	Action
34.	Use the Benefits Summary page to review your current benefits. Note, you can only review your benefits on this page.
35.	Scroll down the page.



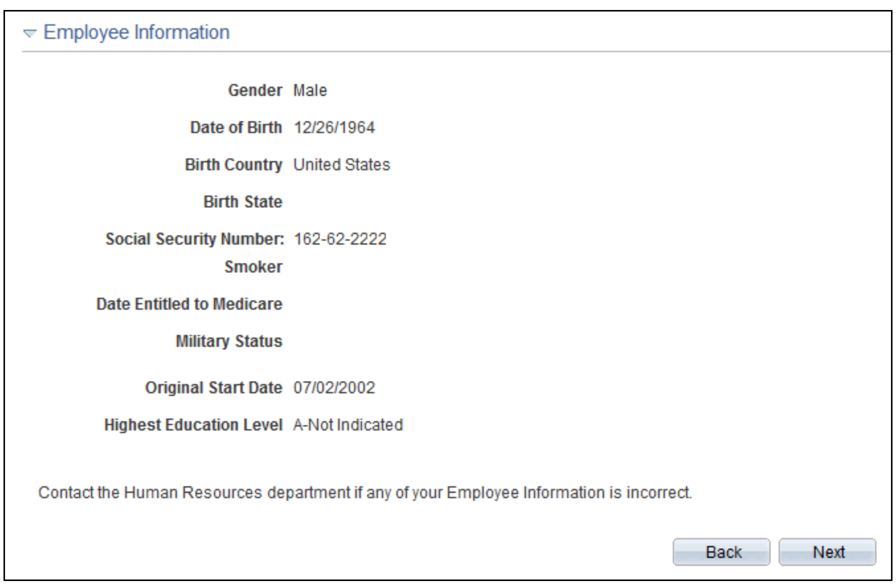
Benefits Summary

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 Depende
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	- - - - -

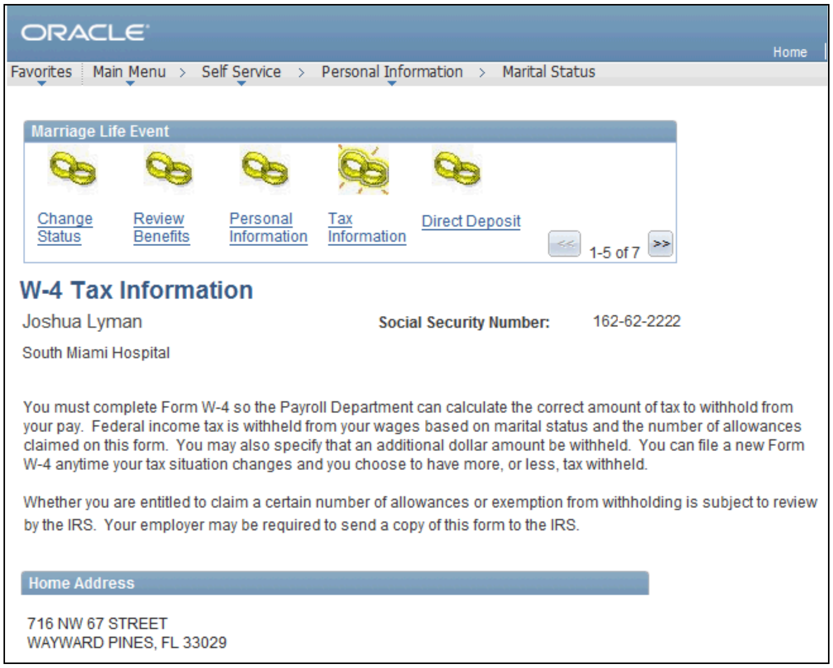
Step	Action
36.	Click the **Next** button. 



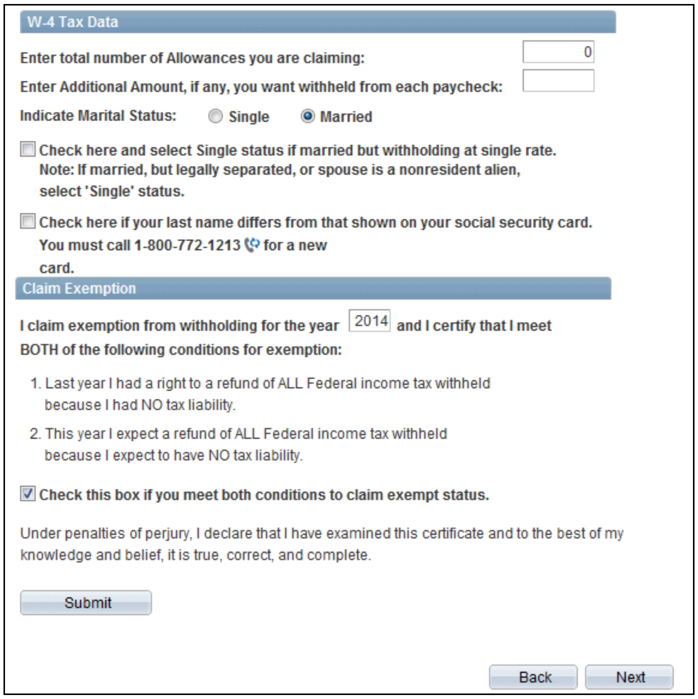
Step	Action
37.	Use the Personal Information Summary page to review your current personal information. You can also use this page if you need to update your personal information as a result of the life event.
38.	Scroll down the page.

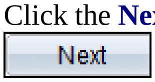


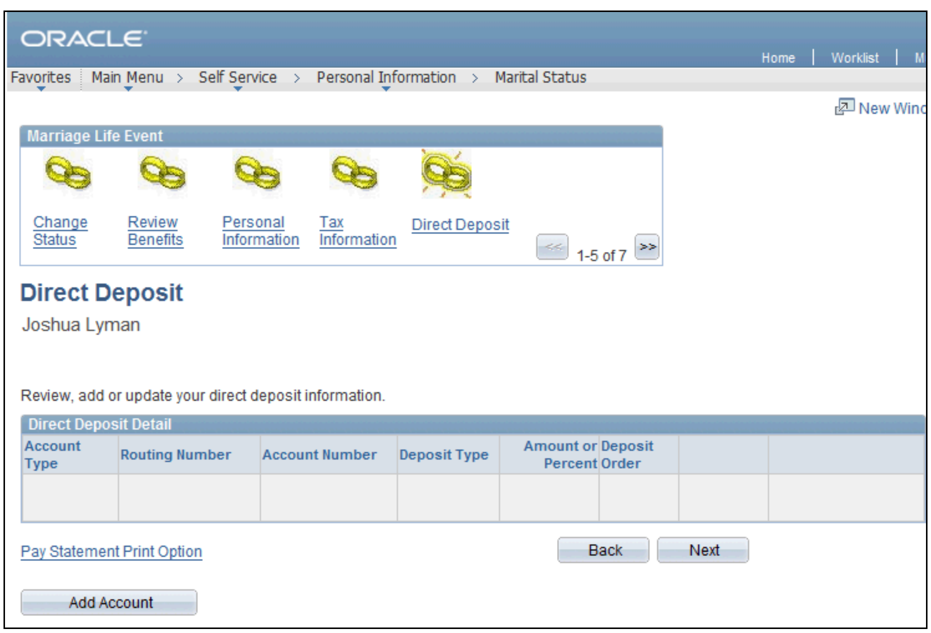
Step	Action
39.	In this example, there are no edits. Click the **Next** button. 



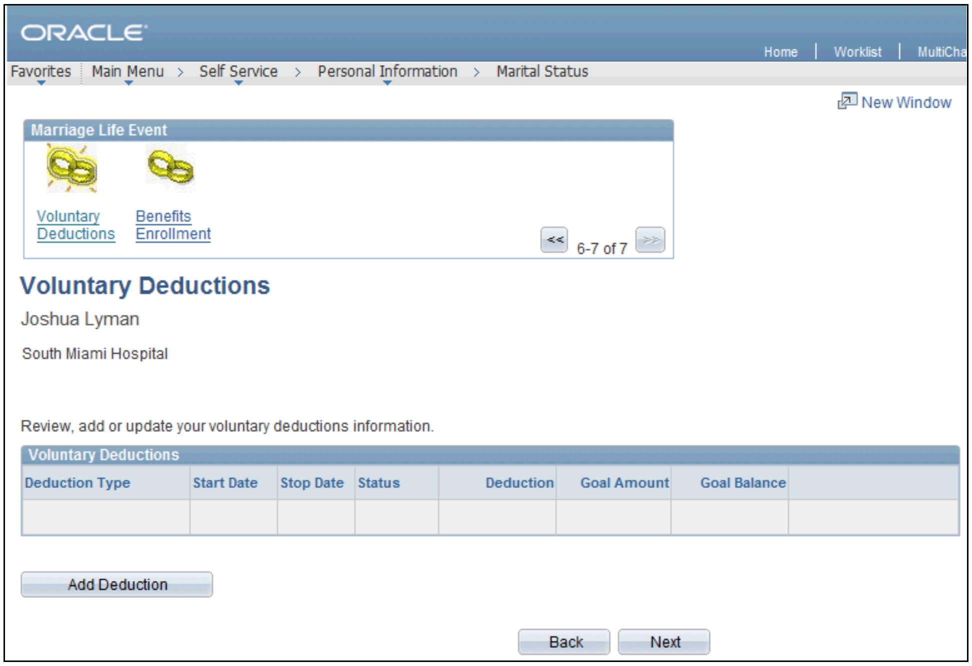
Step	Action
40.	Use the W-4 Tax Information page to review and edit your W-4 Tax Data including marital status, number of allowances, and any additional money to be withheld.
41.	Scroll down the page.

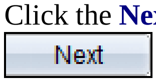


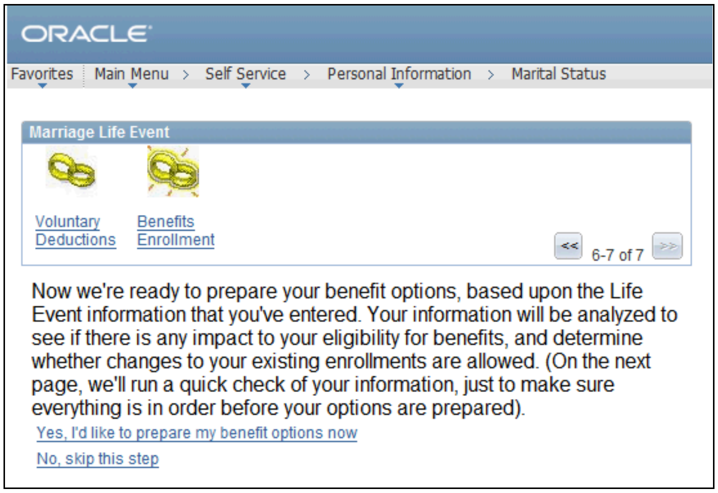
Step	Action
42.	Click the **Next** button. 



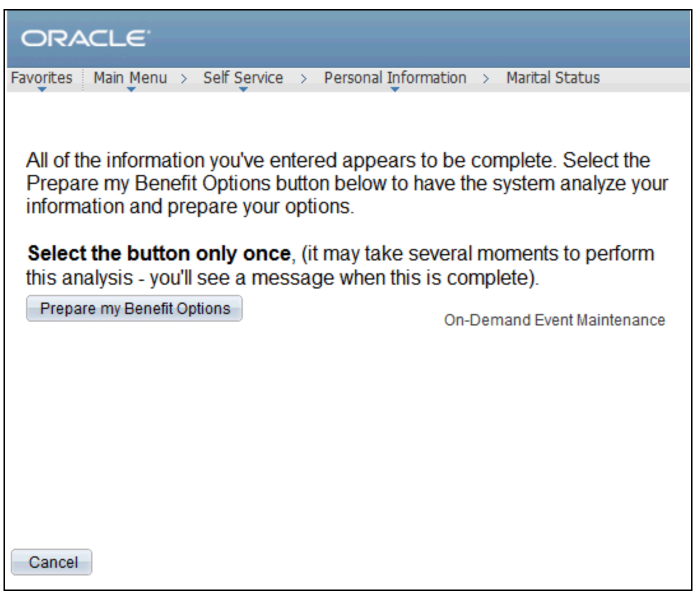
Step	Action
43.	Use the Direct Deposit page to review, add, or update your direct deposit information.
44.	In this example, no additions or edits are needed. Click the **Next** button. 



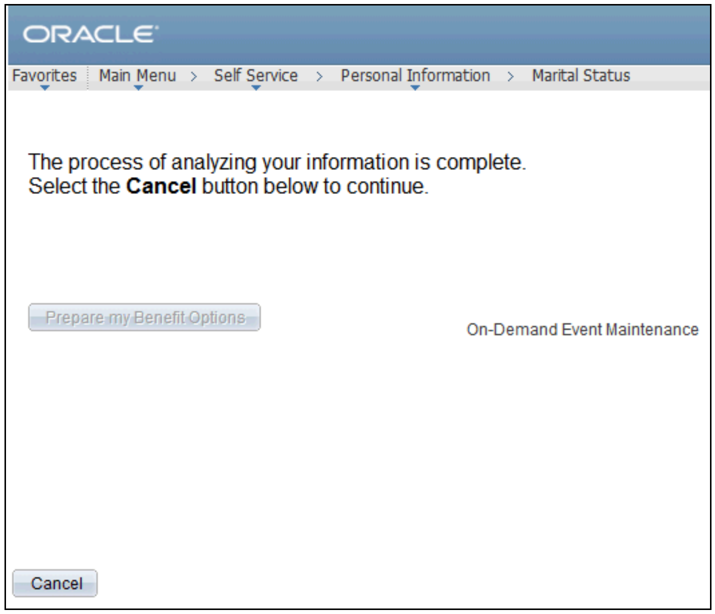
Step	Action
45.	Use the Voluntary Deductions page to review, add, or update your voluntary deductions.
46.	In this example, no additions or edits are needed. Click the **Next** button. 



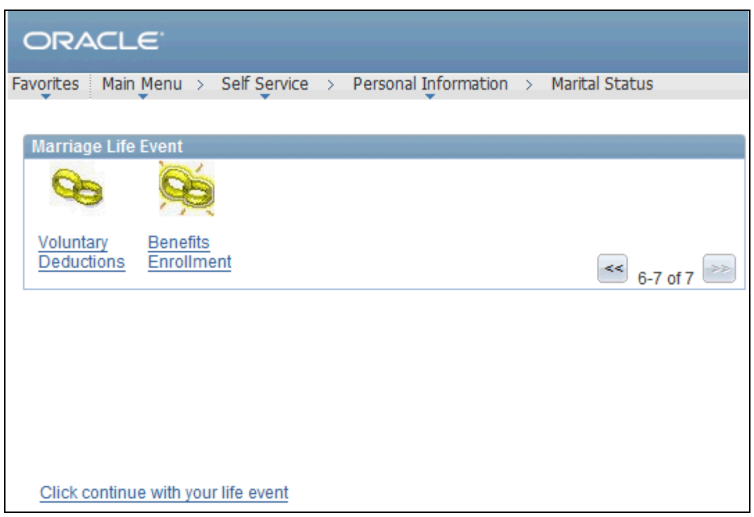
Step	Action
47.	Once you have completed all these steps, your benefit options are ready to be prepared. You can either have your benefits prepared now or you can return to this step later.
48.	In this example, click the **Yes, I'd like to prepare my benefit options now** link.



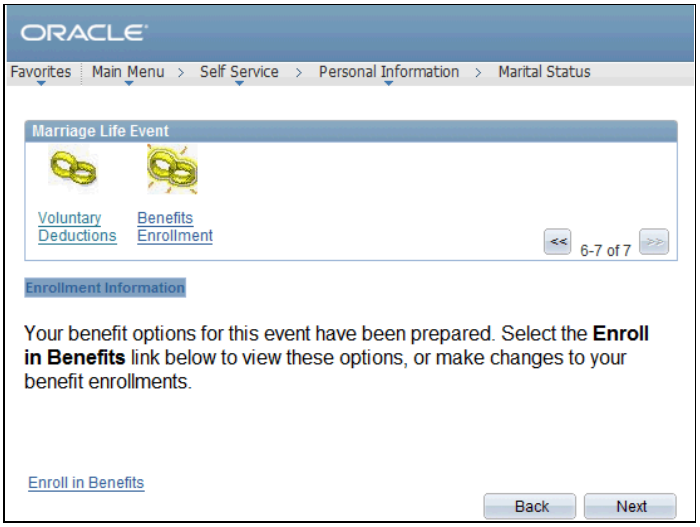
Step	Action
49.	Click the **Prepare my Benefit Options** button. Prepare my Benefit Options



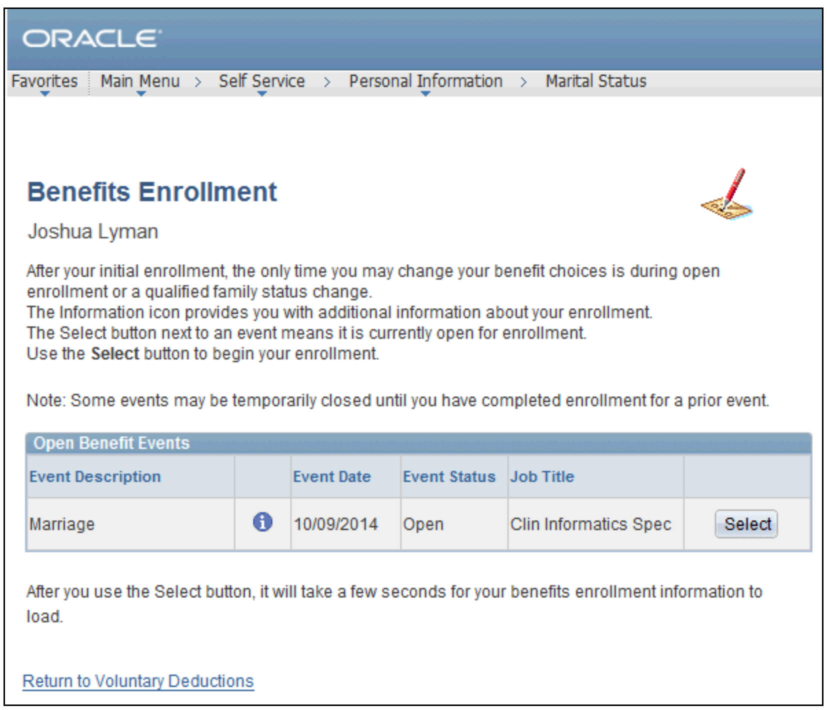
Step	Action
50.	Click the **Cancel** button. Cancel



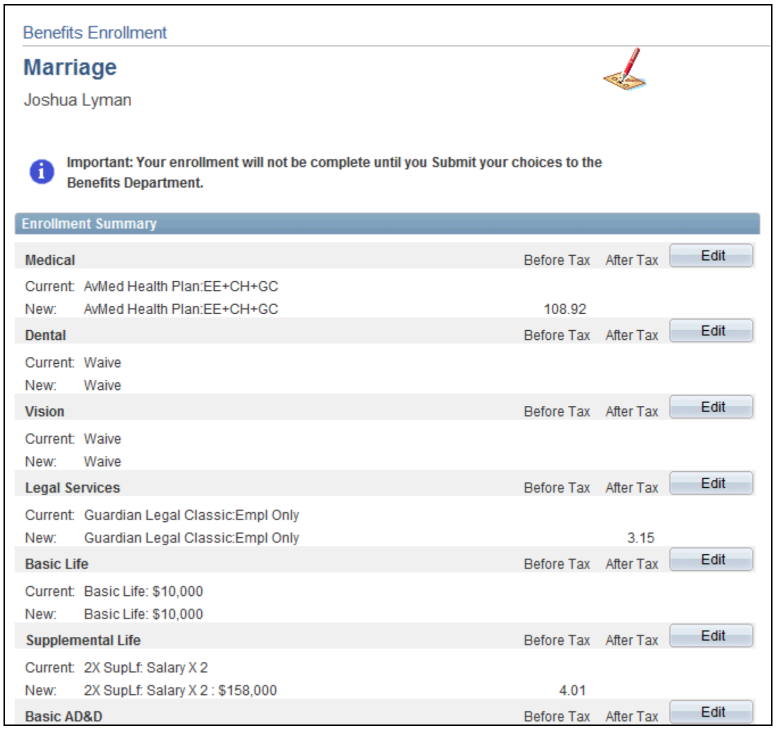
Step	Action
51.	Click the **Click continue with your life event** link.

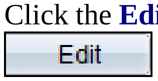


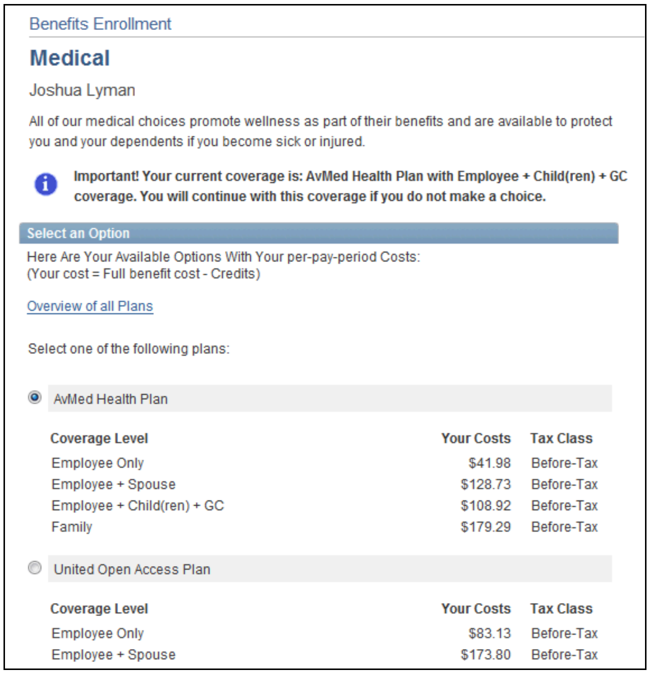
Step	Action
52.	Click the **Enroll in Benefits** link.



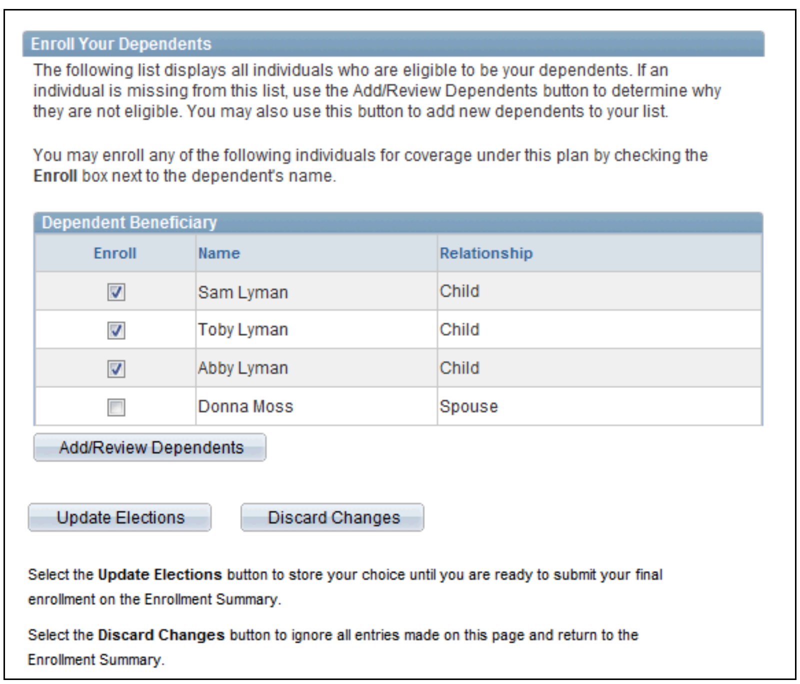
Step	Action
53.	Based on your life event and the information you entered, your benefits are open for enrollment.
54.	Click the **Select** button. Select

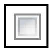
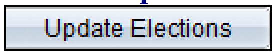


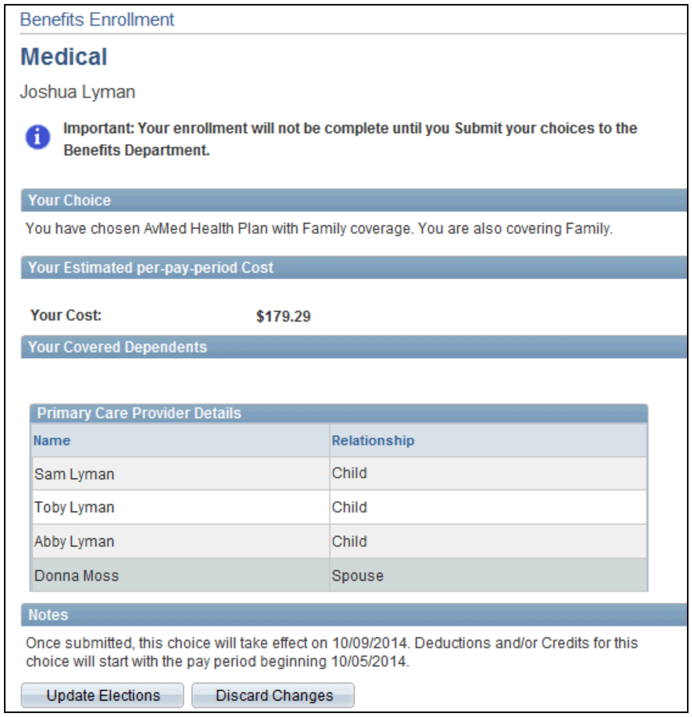
Step	Action
55.	In this example, you will edit your medical, supplemental life, and dependent life spouse benefits. Be sure you make all necessary edits before submitting.
56.	Click the **Edit** button to the right of Medical. 

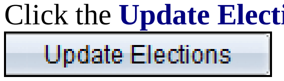


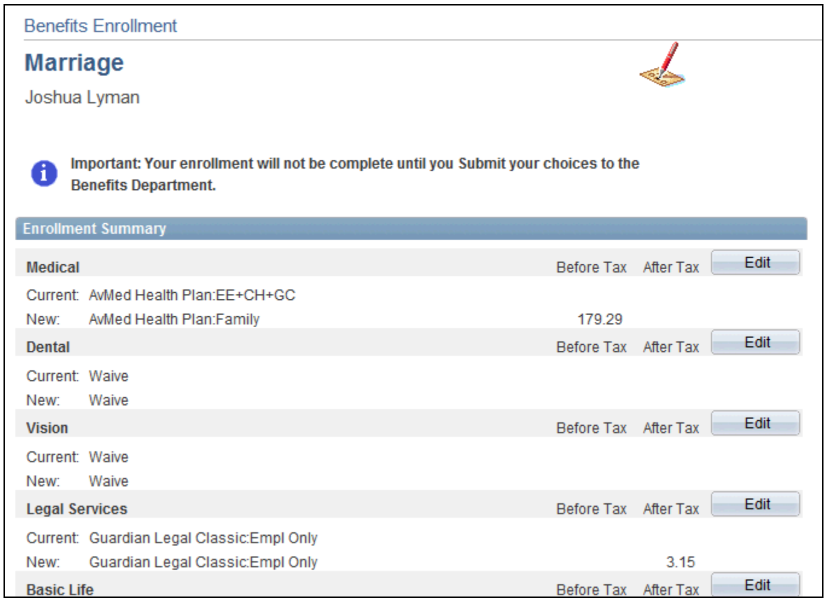
Step	Action
57.	Note your current coverage and that, if you do not make any edits, you will continue with this coverage.
58.	Scroll down the page.



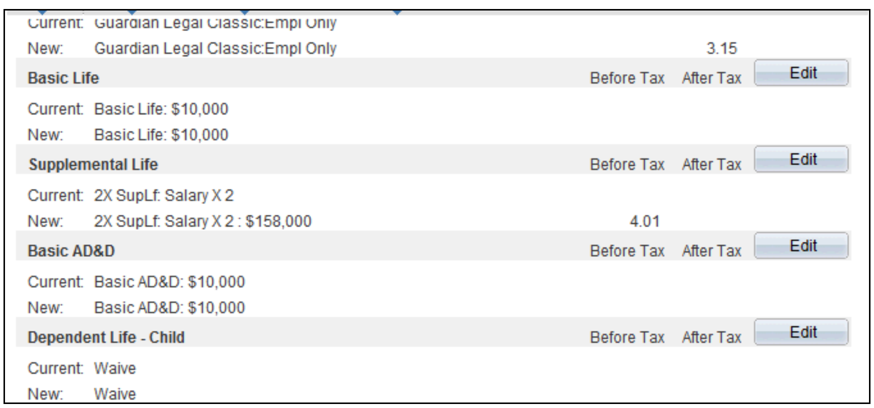
Step	Action
59.	Click the **Enroll** option to the left of the appropriate Dependent or Beneficiary. 
60.	Click the **Update Elections** button. 



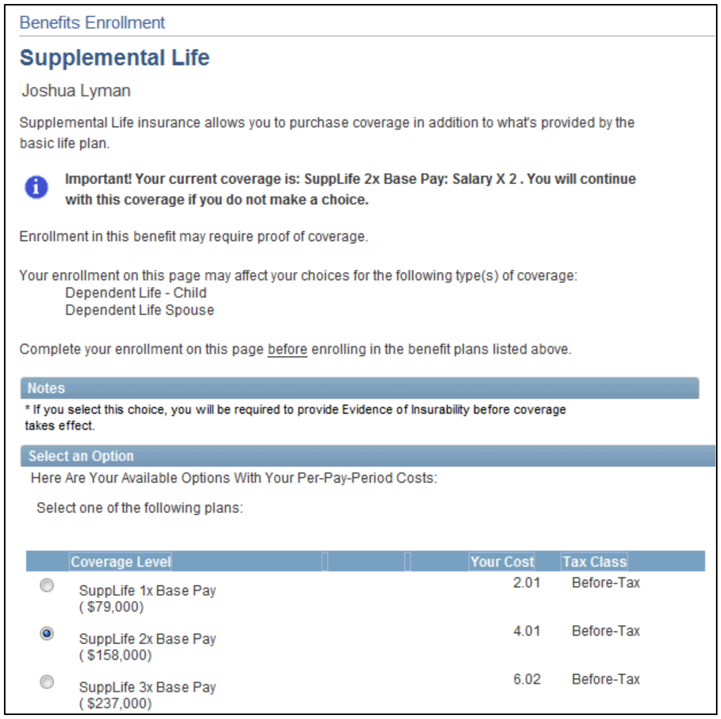
Step	Action
61.	Review your selection, including the cost and covered dependents. Click Discard Changes to return and change your choices. Click Update Elections to save your choices.
62.	Click the **Update Elections** button. 



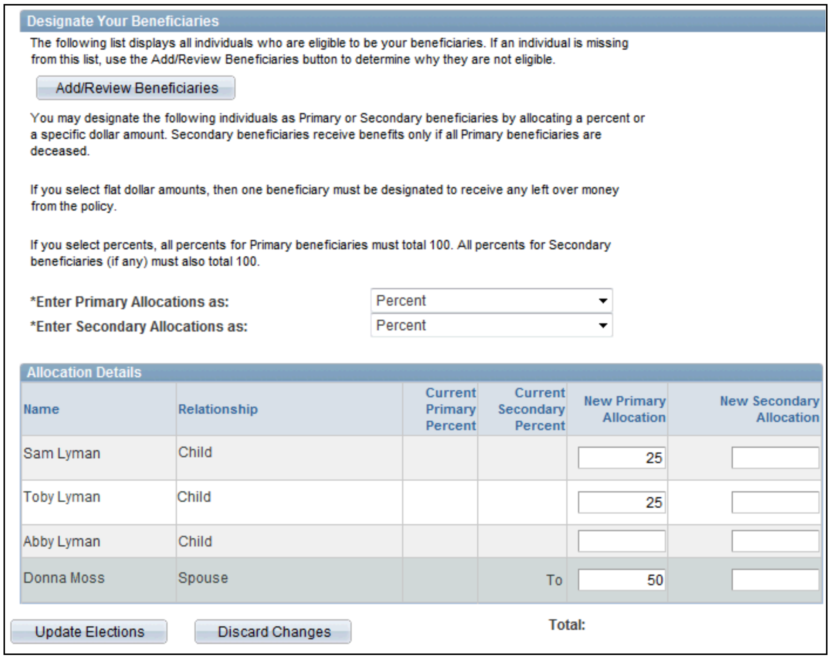
Step	Action
63.	Scroll down the page.

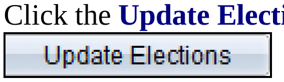


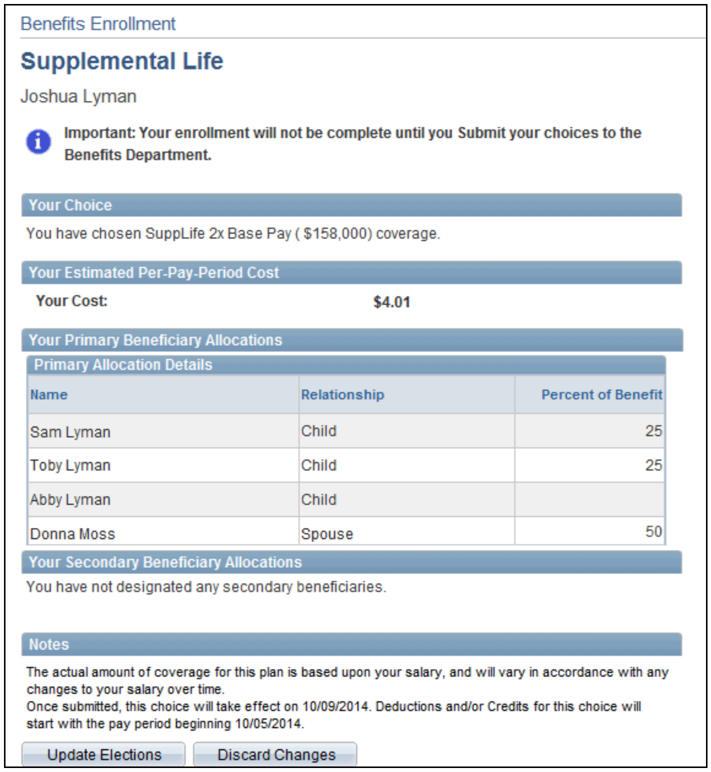
Step	Action
64.	Click the **Edit** button to the right of Supplemental Life. Edit

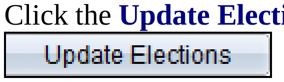


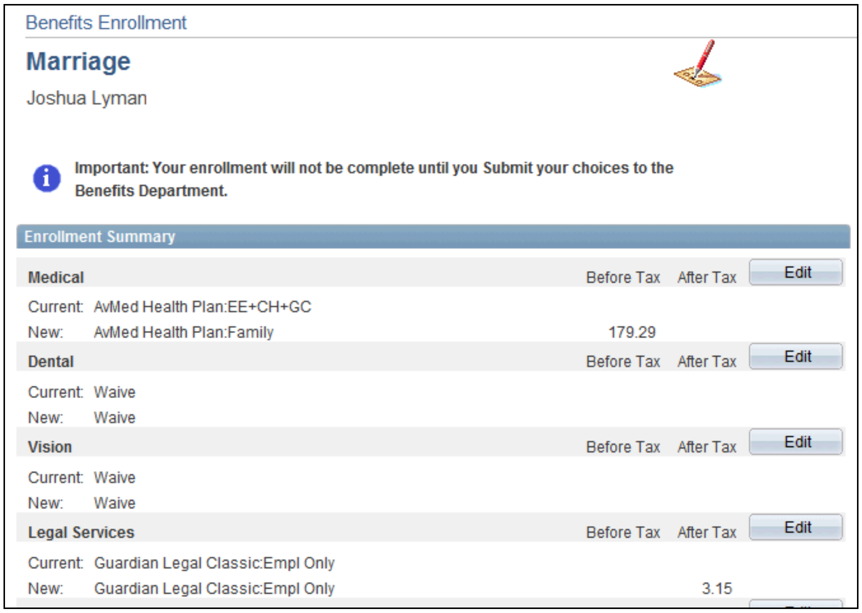
Step	Action
65.	Note your current coverage and that, if you do not make any edits, you will continue with this coverage.
66.	On this page, select a coverage level and designate allocations to your dependents/beneficiaries. In this example, you will keep the current coverage level.
67.	Scroll down the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



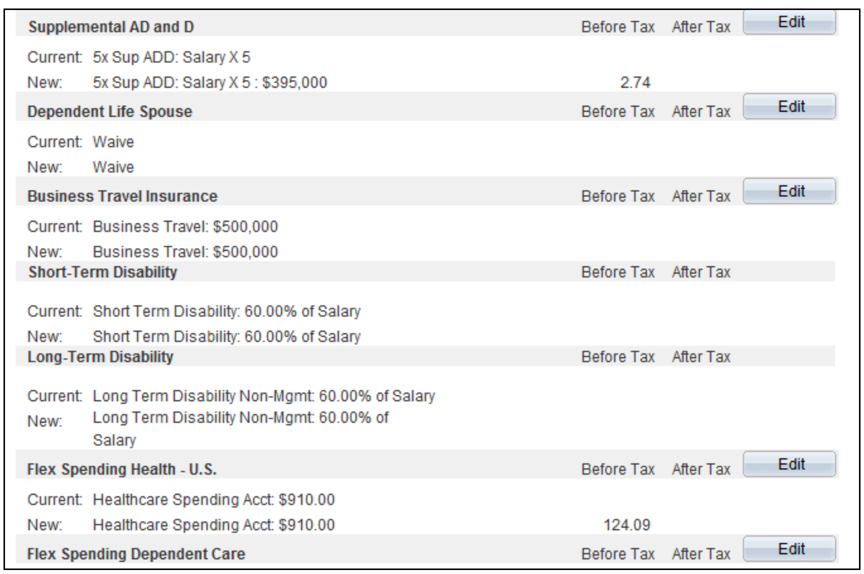
Step	Action
68.	Next, you will update the allocation details for your Supplemental Life coverage. Be sure to read the information under the Designate Your Beneficiaries section.
69.	Enter the desired information into the **New Primary Allocation** field for each beneficiary.
70.	Click the **Update Elections**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

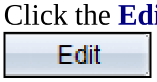


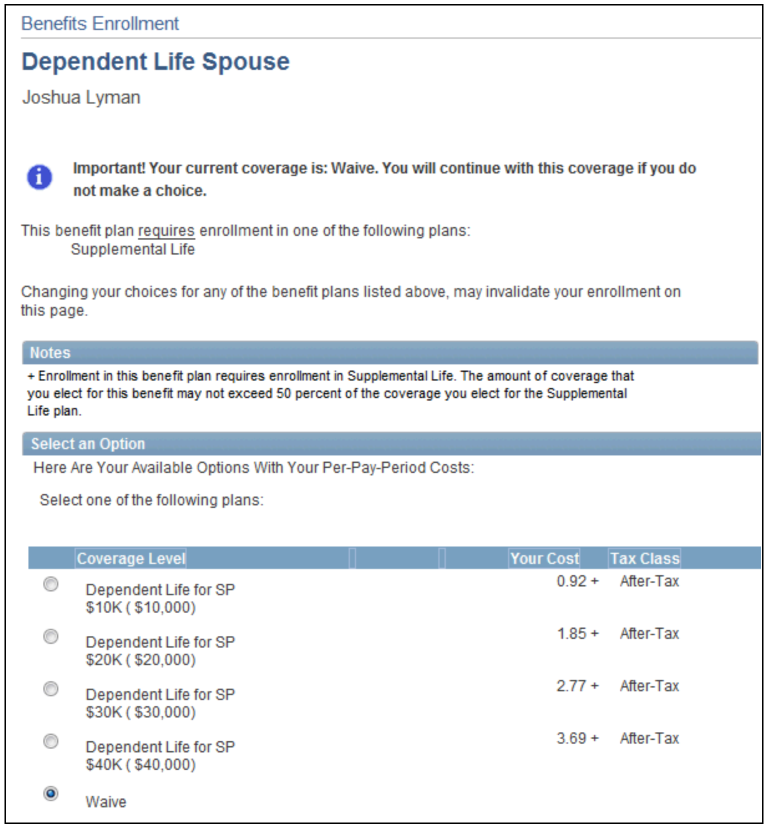
Step	Action
71.	Review your selection, including the cost and allocation details. Click Discard Changes to return and change your choices. Click Update Elections to save your choices.
72.	Click the **Update Elections** button. 



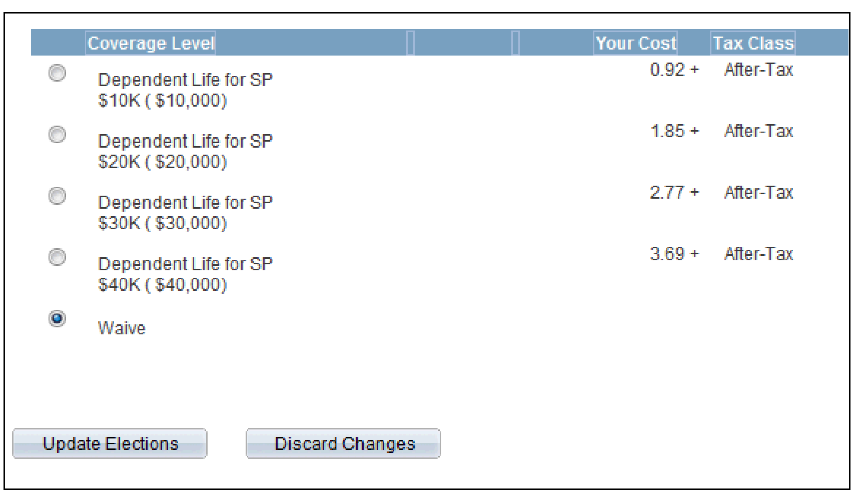
Step	Action
73.	Scroll down the page.



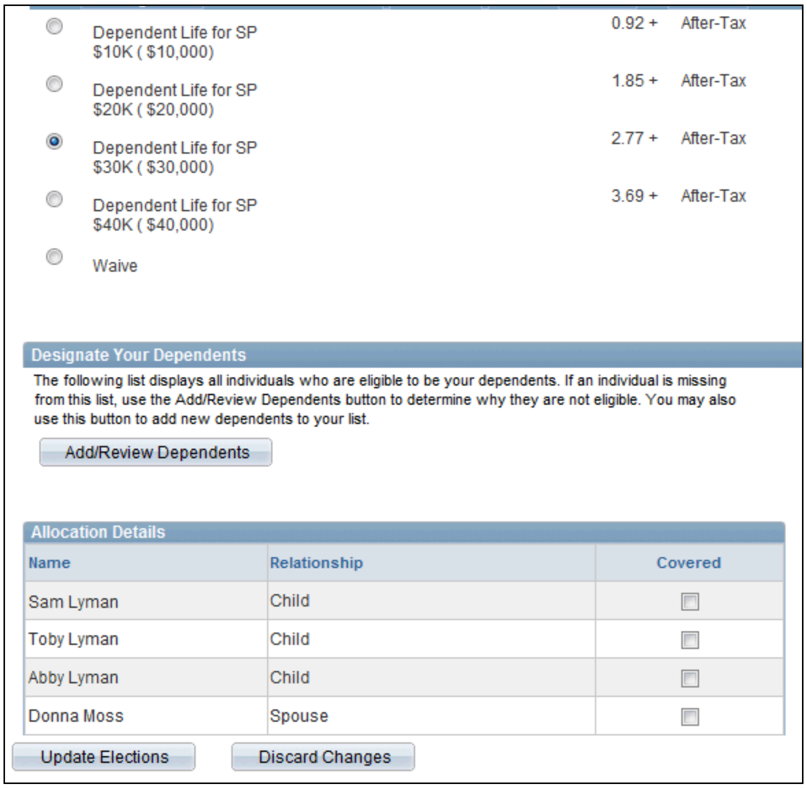
Step	Action
74.	Click the **Edit** button to the right of Dependent Life Spouse. 

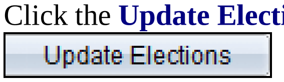


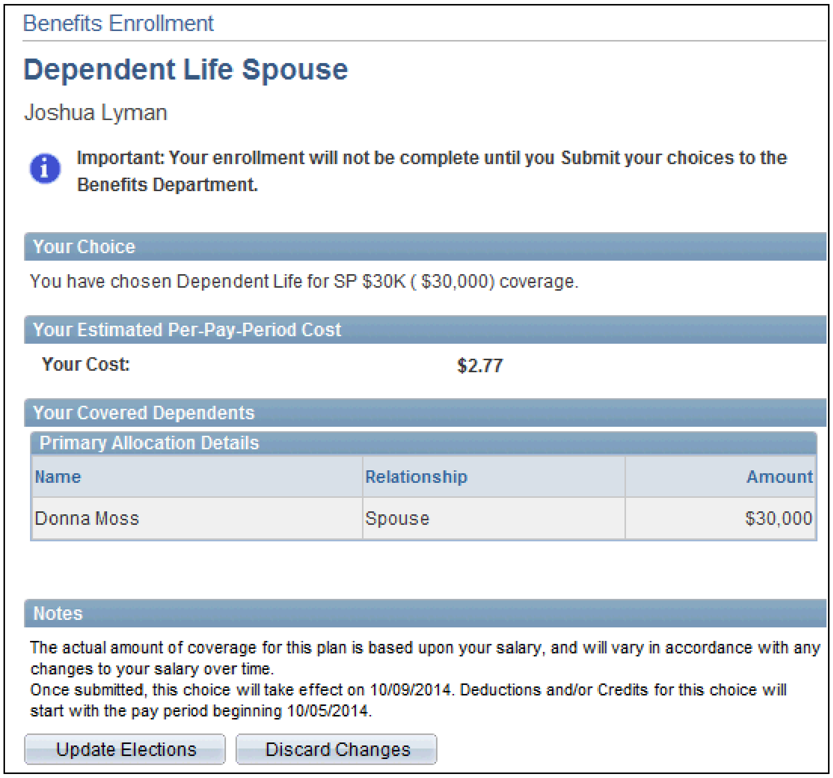
Step	Action
75.	Note your current coverage and that, if you do not make any edits, you will continue with this coverage.
76.	Scroll down the page.

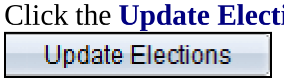


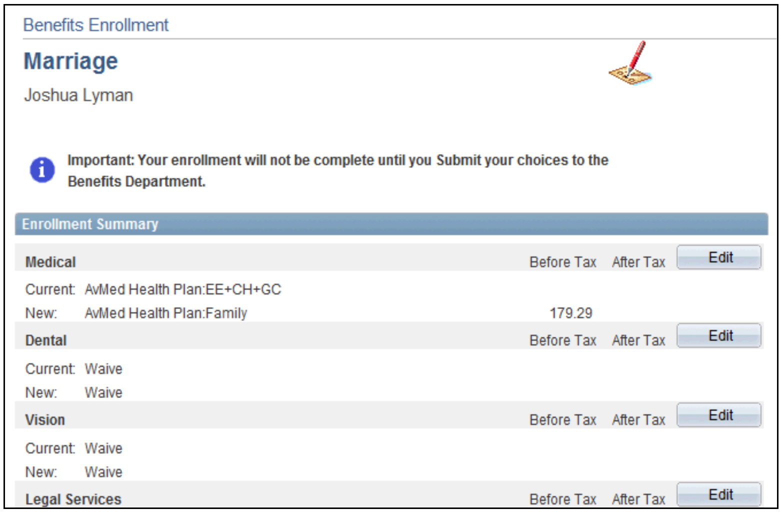
Step	Action
77.	To enroll in coverage, click the **Yes** option to the left of the appropriate coverage level. 
78.	Scroll down the page.



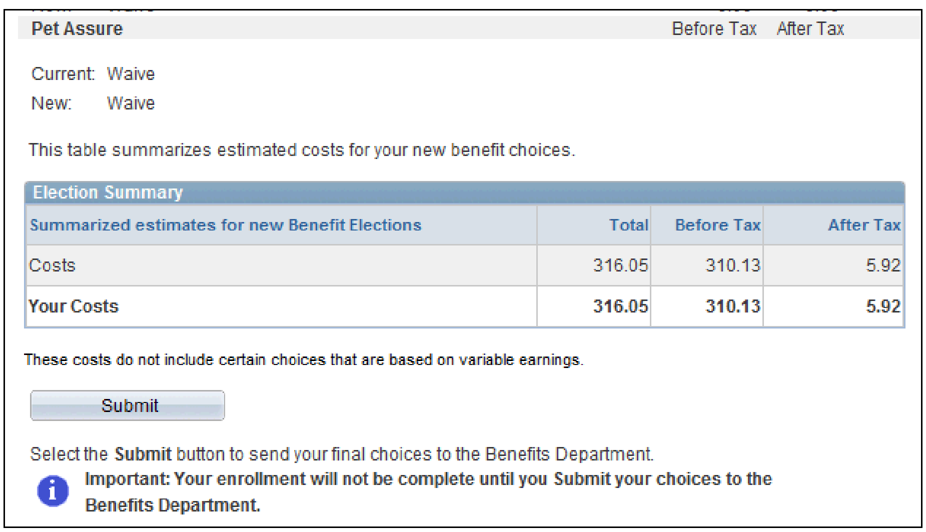
Step	Action
79.	Next, designate the dependent you are covering.
80.	Click the **Covered** option to the right of the appropriate dependent. 
81.	Click the **Update Elections** button. 

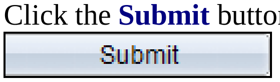


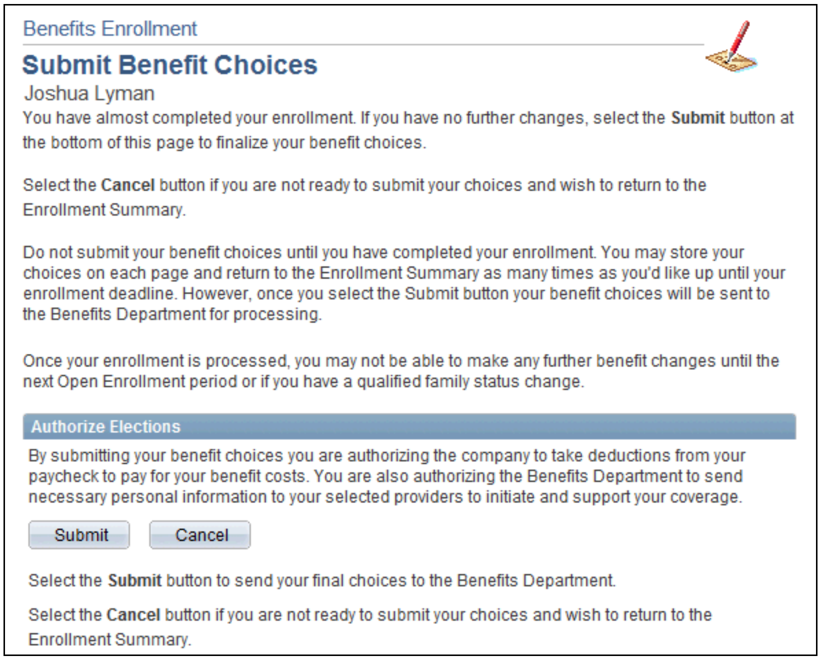
Step	Action
82.	Review your selection, including the cost and allocation details. Click Discard Changes to return and change your choices. Click Update Elections to save your choices.
83.	Click the **Update Elections** button. 

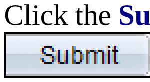


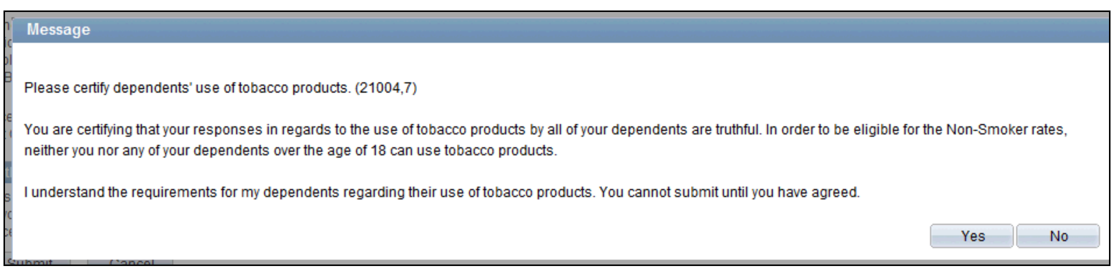
Step	Action
84.	Scroll down the page.

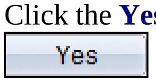


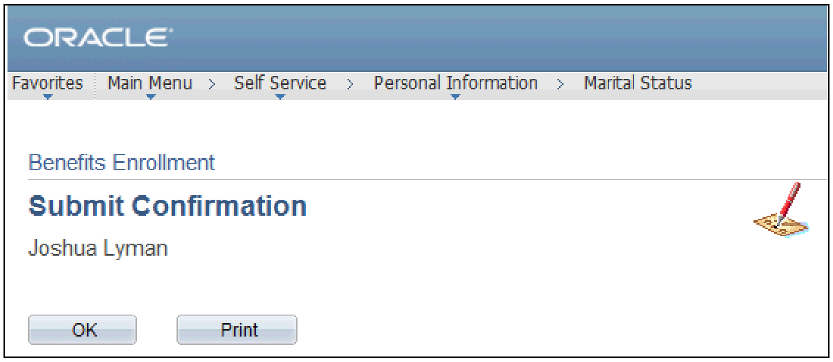
Step	Action
85.	Be sure to review the Election Summary table. This table contains the summarized estimated costs for your new elections.
86.	Click the **Submit** button. 



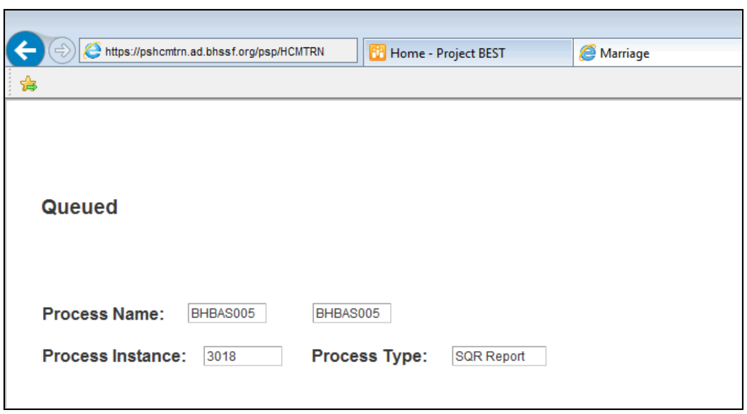
Step	Action
87.	Before submitting your benefit choices, please read the information on this page.
88.	Click the **Submit** button to send your final choices to the Benefits Department. 



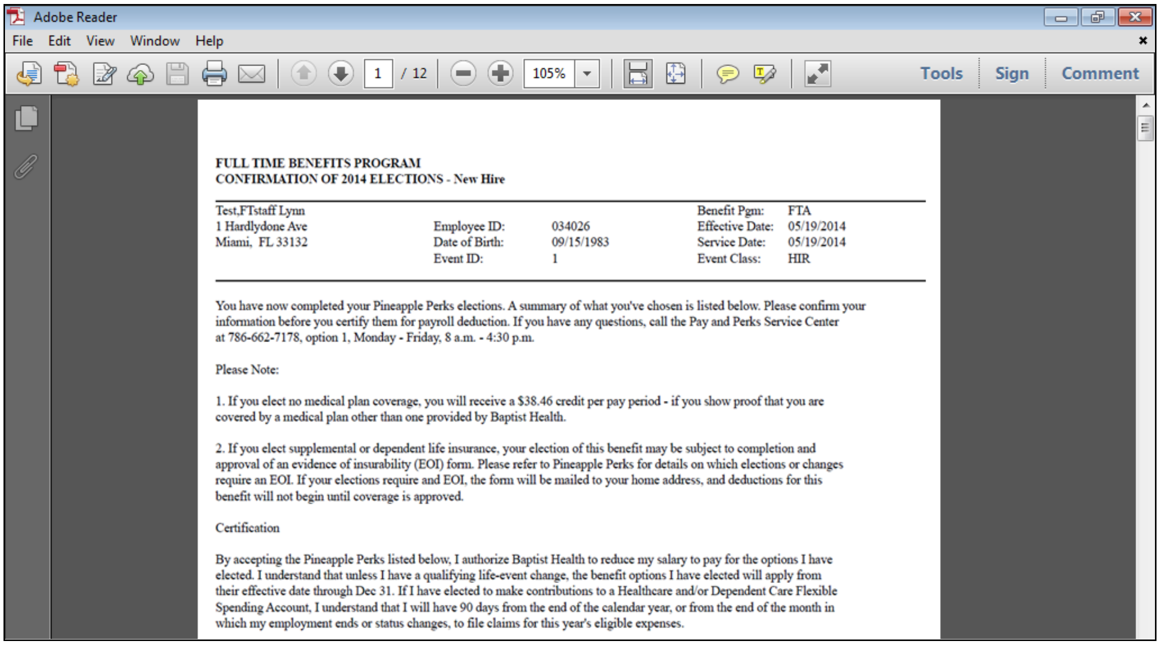
Step	Action
89.	Click the **Yes** button. 



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. 



FULL TIME BENEFITS PROGRAM
CONFIRMATION OF 2014 ELECTIONS - New Hire

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

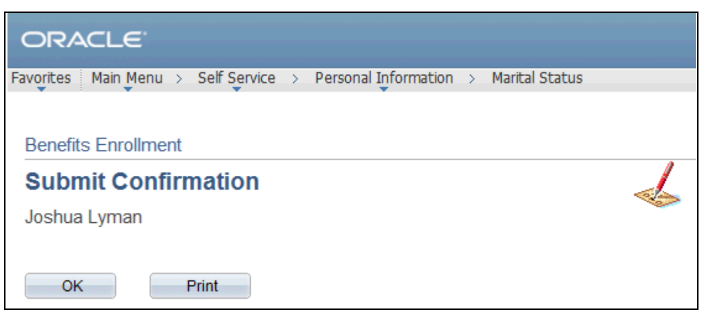
1. If you elect no medical plan coverage, you will receive a $38.46 credit per pay period - if you show proof that you are covered by a medical plan other than one provided by Baptist Health.

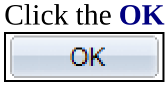
2. If you elect supplemental or dependent life insurance, your election of this benefit may be subject to completion and approval of an evidence of insurability (EOI) form. Please refer to Pineapple Perks for details on which elections or changes require an EOI. If your elections require and EOI, the form will be mailed to your home address, and deductions for this benefit will not begin until coverage is approved.

Certification

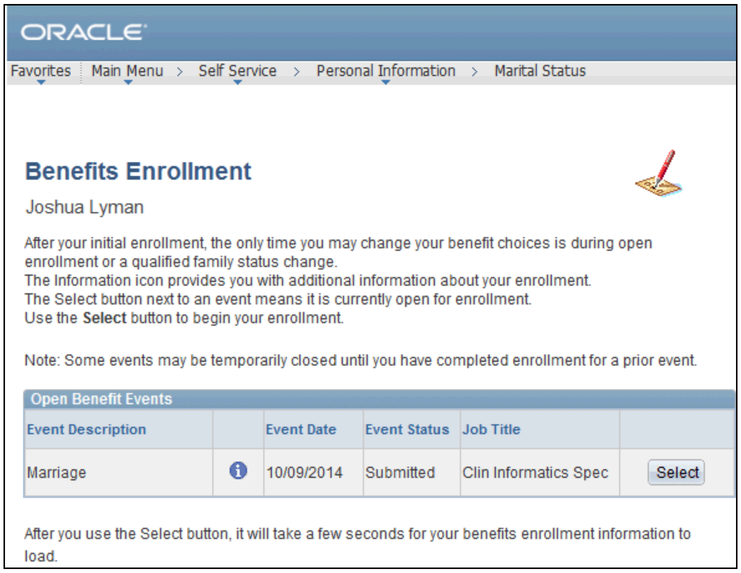
By accepting the Pineapple Perks listed below, I authorize Baptist Health to reduce my salary to pay for the options I have elected. I understand that unless I have a qualifying life-event change, the benefit options I have elected will apply from their effective date through Dec 31. If I have elected to make contributions to a Healthcare and/or Dependent Care Flexible Spending Account, I understand that I will have 90 days from the end of the calendar year, or from the end of the month in which my employment ends or status changes, to file claims for this year's eligible expenses.

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.

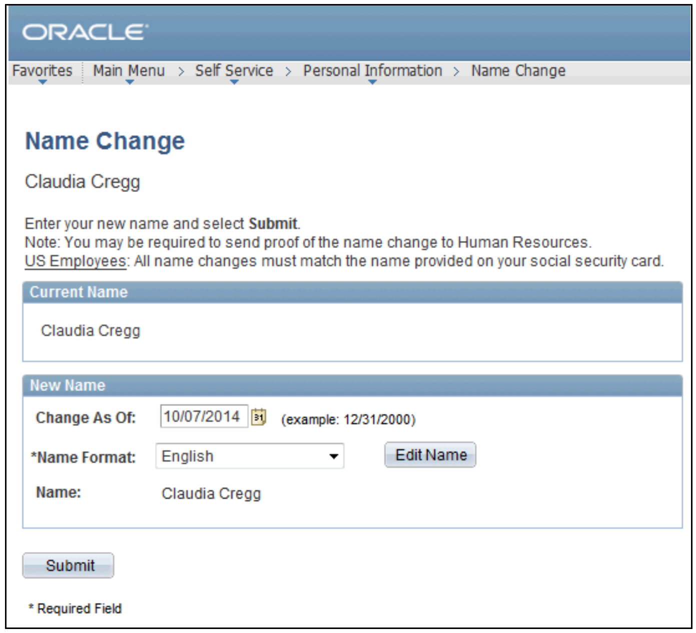


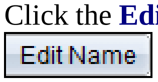
Step	Action
98.	**Congratulations.** You have updated your marital status in your personal profile. **End of Procedure.**

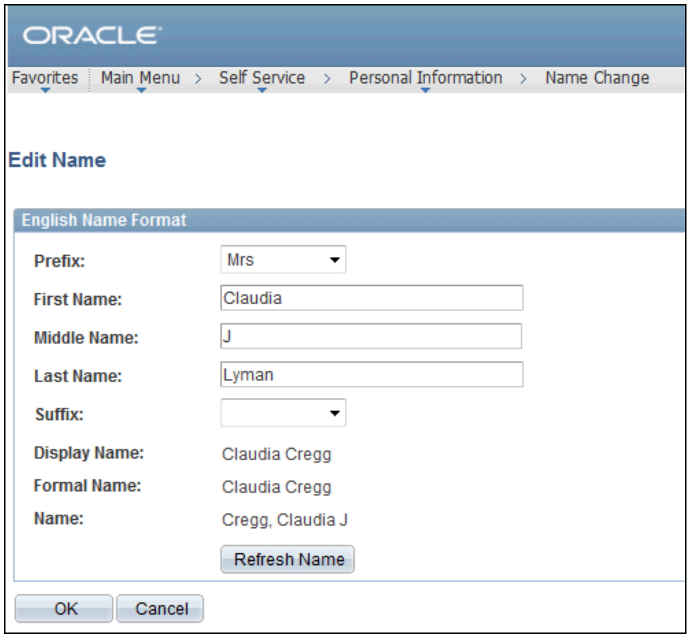
Updating Personal Profile Information - Name

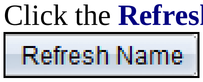
Navigation: Main Menu > HCM > Self Service > Personal Information > Name Change

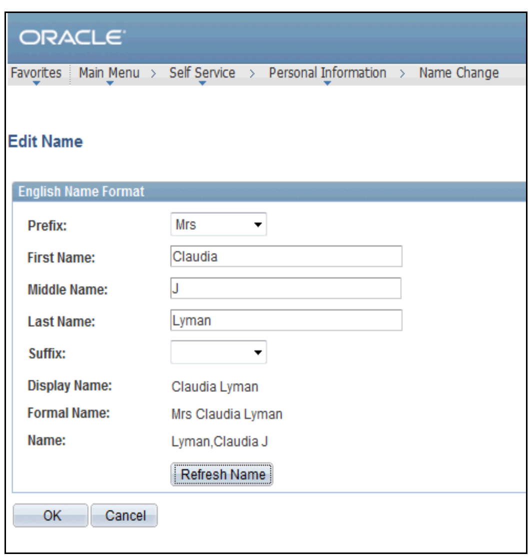
Purpose: Use this transaction to practice updating your personal profile information. In this example, you will update your name.



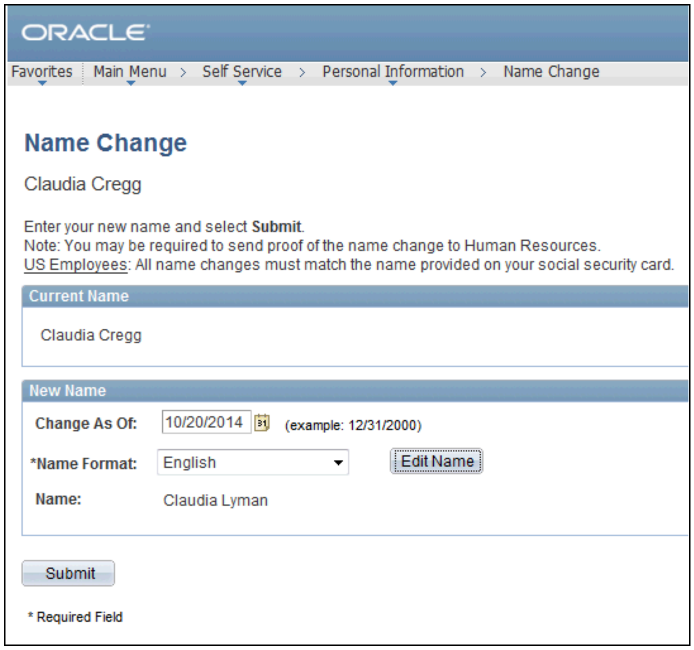
Step	Action
1.	Use the Name Change page to update your name. To update your name, you need to select the date the change will occur, enter your new name, and select your name format. Note: You may be required to send proof of the name change to Human Resources. Also, all name changes must match the name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



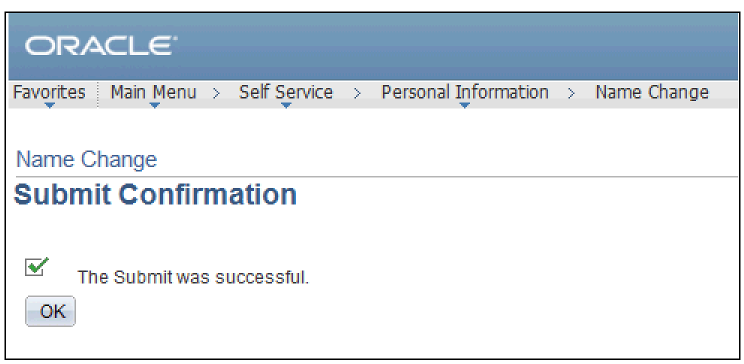
Step	Action
4.	Use the Edit Name page to update your name.
5.	Click the button to the right of the **Prefix** field. 
6.	Click the appropriate **Prefix** list item.
7.	Enter the desired information into the **Last Name** field.
8.	Click the **Refresh Name** button. 



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. OK



Step	Action
11.	Click the **Submit** button. Submit



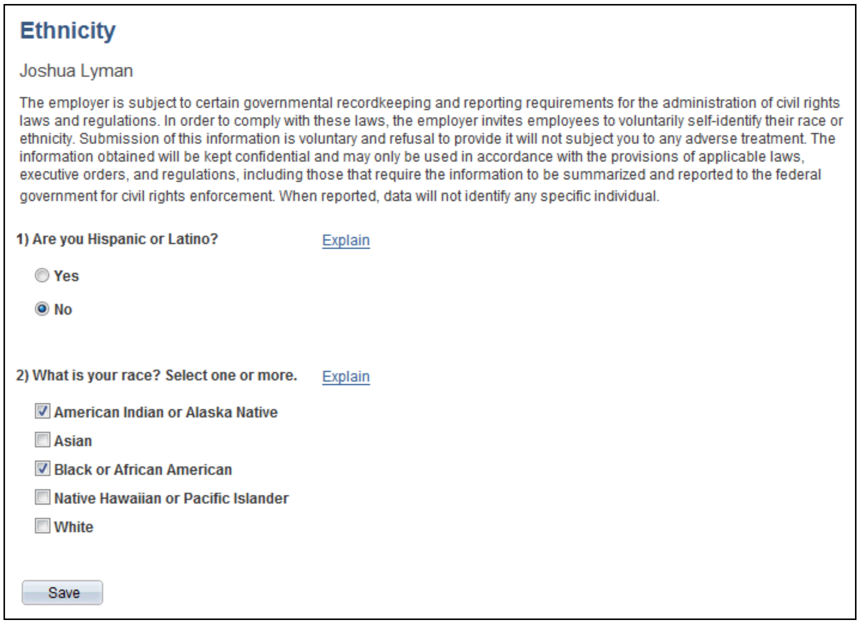
Step	Action
12.	Click the **OK** button. OK

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

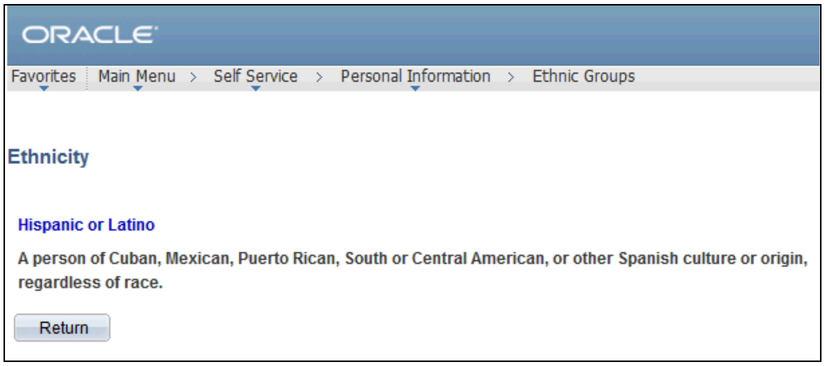
Updating Personal Profile Information - Ethnic Group

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

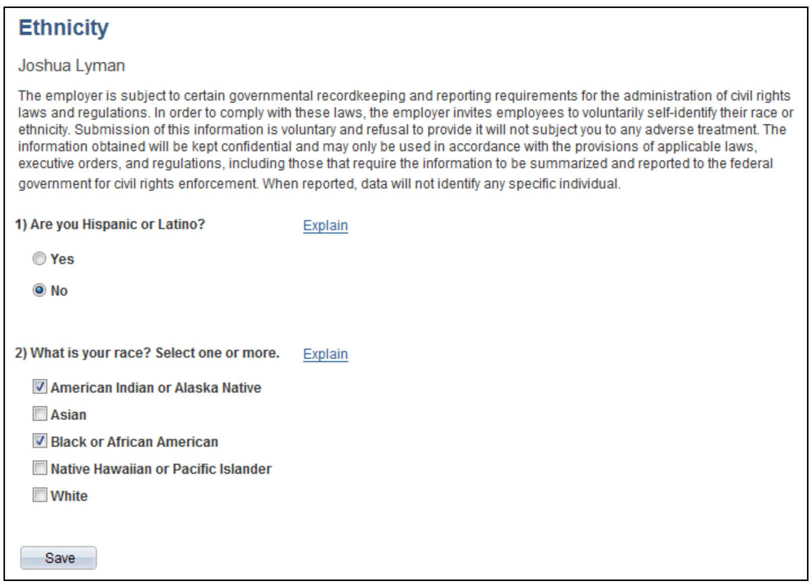
Purpose: Use this transaction to practice updating your personal profile information. In this example, you will update your ethnic group information.



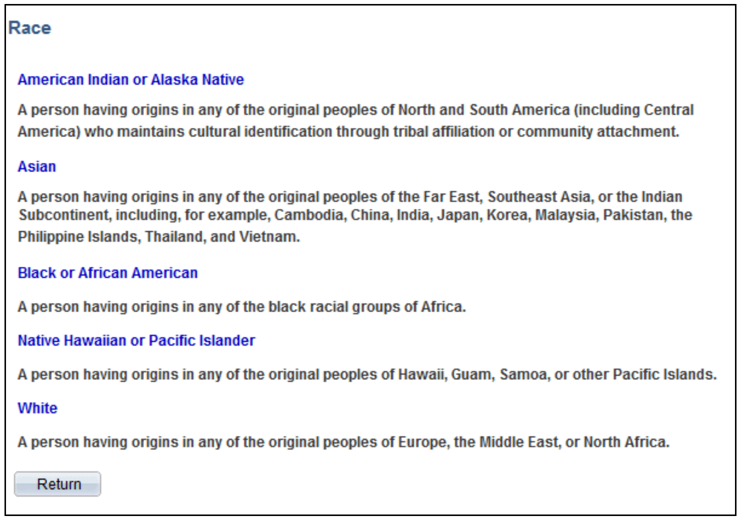
Step	Action
1.	Use the Ethnicity page to voluntarily select the race or ethnicity with which you identify. Submitting this information is voluntary and refusal to provide it will not result in any adverse treatment. Should you provide this information, all information will be kept confidential and may 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



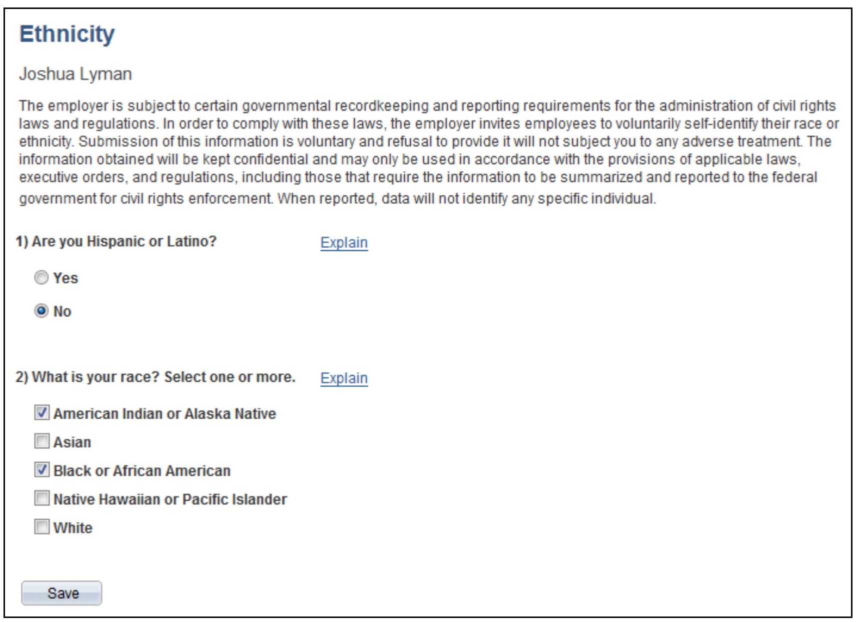
Step	Action
3.	Additional information is provided here to help you make the appropriate selection. Read the displayed information and then click the **Return** button. Return



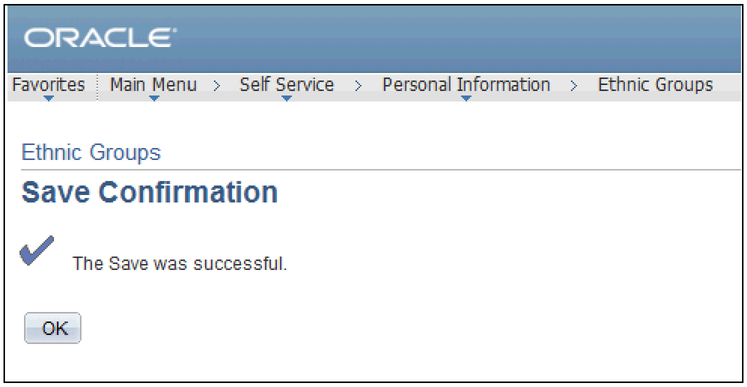
Step	Action
4.	In this example, you will update the race you identify with.
5.	Click the **Explain** link to the right of Question 2. Explain



Step	Action
6.	Read the displayed information and then click the **Return** button. Return



Step	Action
7.	Deselect the **American Indian or Alaska Native** option.
Step	**Action**
8.	Once you have made all updates, click the **Save** button. Save



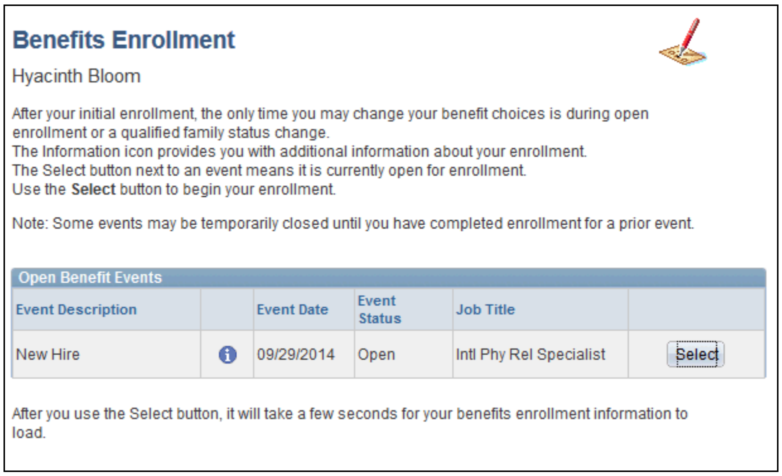
Step	Action
9.	Click the **OK** button. 
10.	**Congratulations.** You have updated your ethnic group information in your personal profile. **End of Procedure.**

Managing Benefits

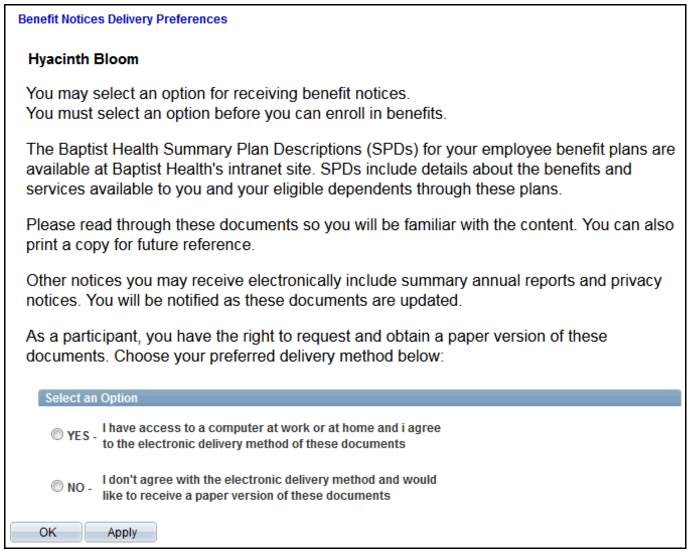
Updating Benefit Elections - New Hire

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

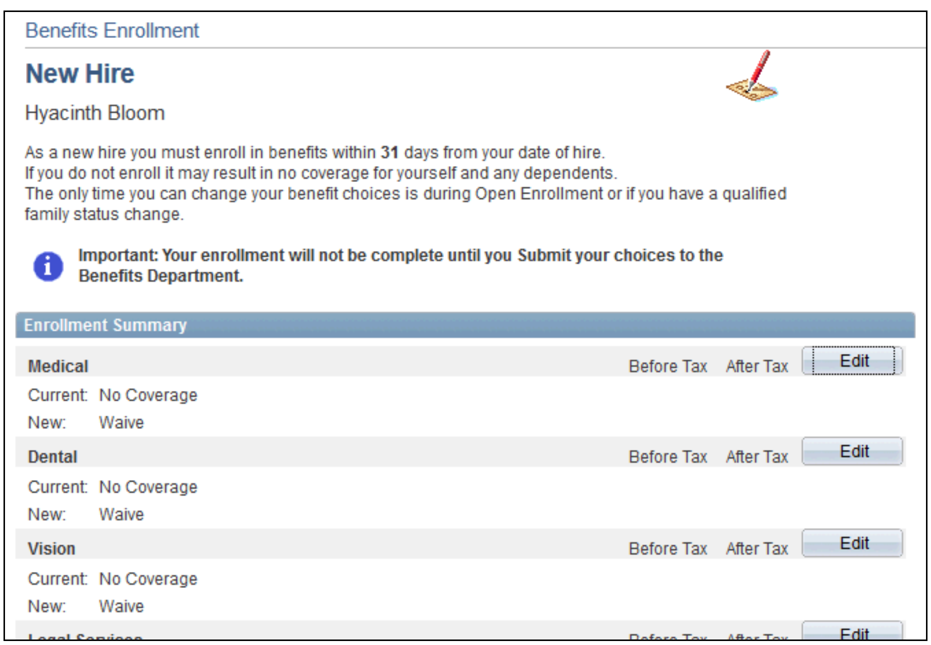
Objective: Use this transaction to practice electing benefits during a new hire event.



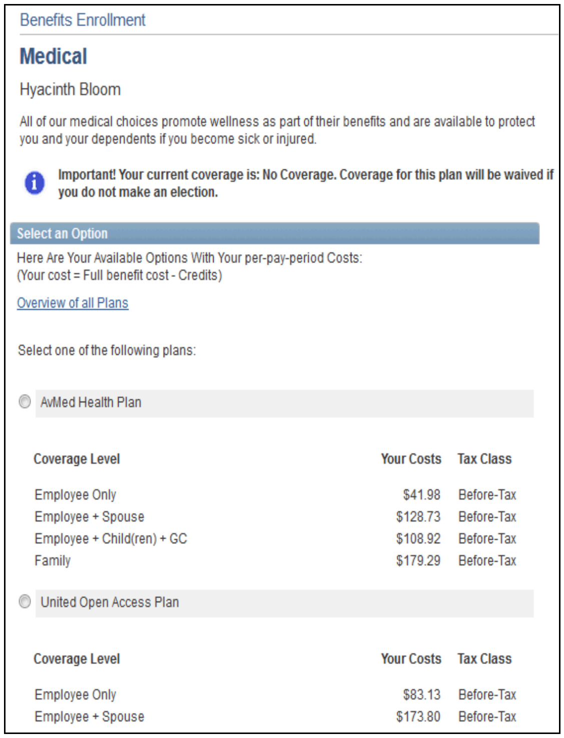
Step	Action
1.	Use the Benefits Enrollment page to view your open benefit events. Any event with a Select button next to it means it is currently open for enrollment. Click the Select button to begin your enrollment.
2.	Click the **Select** button. 



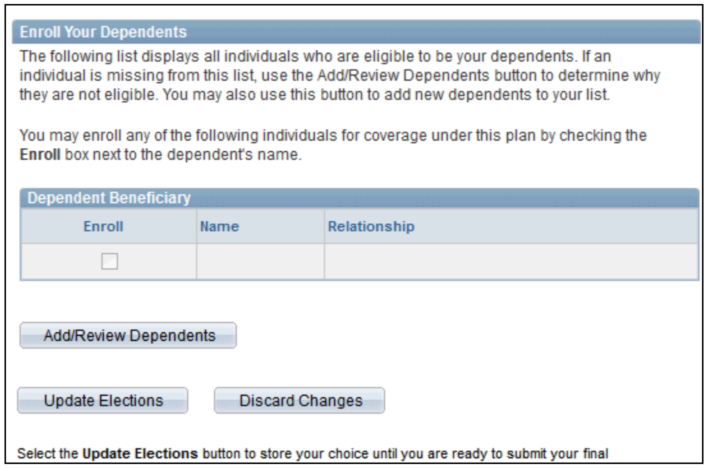
Step	Action
3.	Read the Benefit Notices Delivery Preferences message before selecting an option.
4.	In this example, click the **YES** radio button.
5.	Click the **Apply** button. Apply
6.	Click the **OK** button. OK



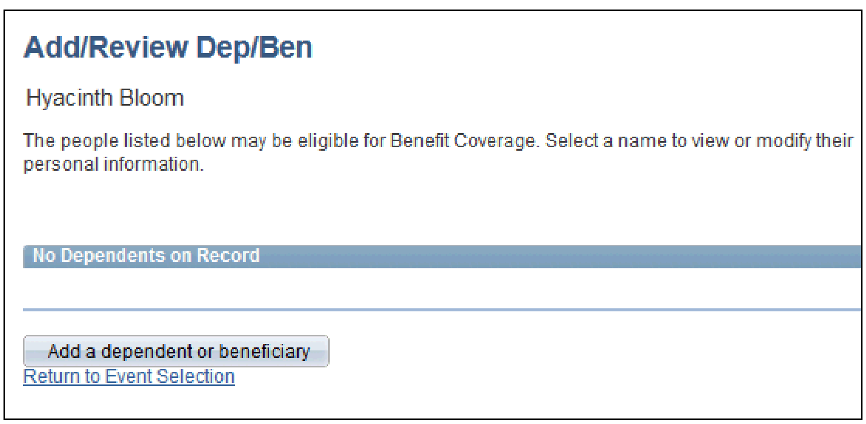
Step	Action
7.	Use the Enrollment Summary table to view your current coverage and elect new coverage. To elect benefits, click the Edit button to the right of the appropriate benefit. In this example, you will elect coverage for several benefits. Be sure you make all necessary edits before submitting.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



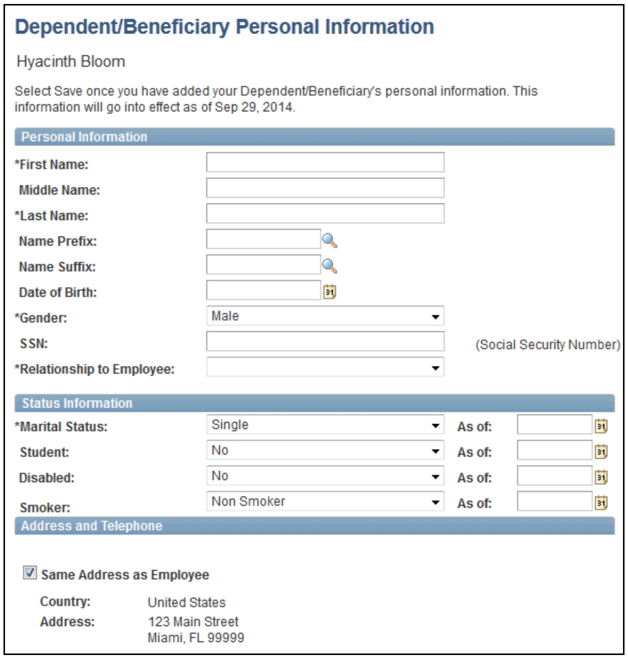
Step	Action
9.	For each benefit you wish to enroll in, there is a note reminding you of your current coverage. Until your elections are submitted your coverage will not change.
10.	To enroll in coverage, click the radio button to the left of the appropriate medical plan. 
11.	Scroll down the page.



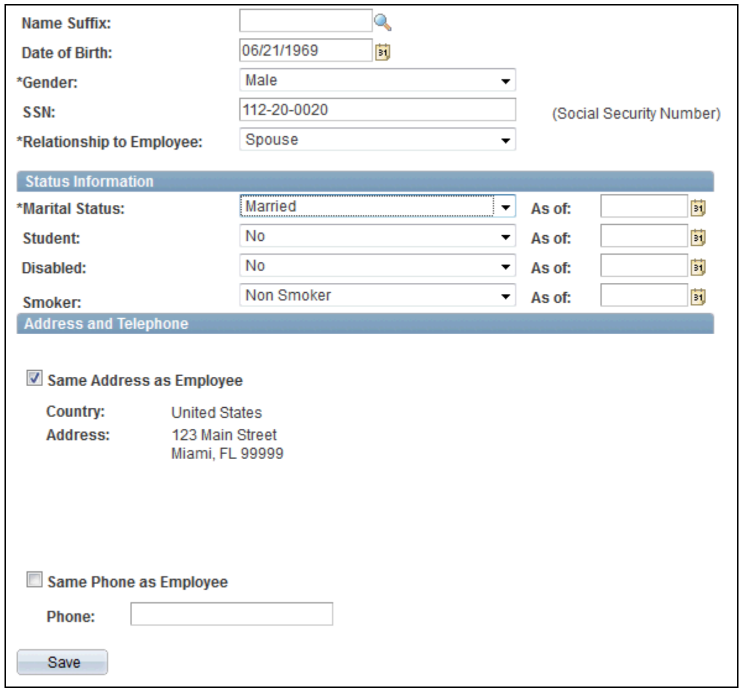
Step	Action
12.	Currently, you have no dependents listed. If you do not wish to enroll any dependents, click the Update Elections button to continue. In this example, you will add dependents.
13.	Click the **Add/Review Dependents** button. Add/Review Dependents

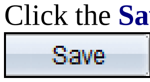


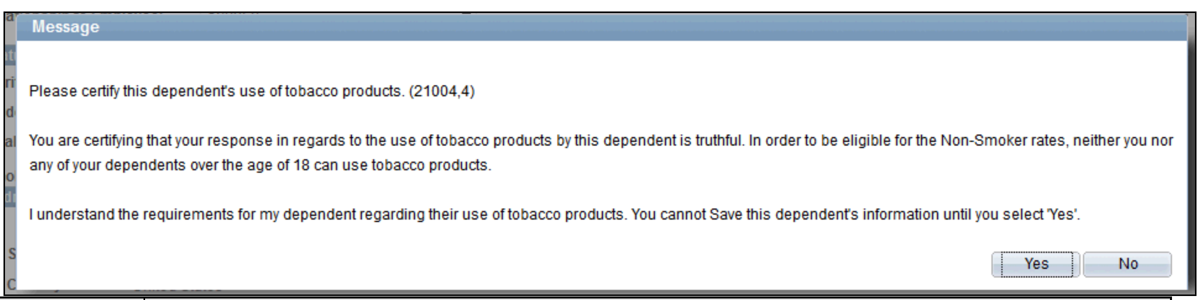
Step	Action
14.	Click the **Add a dependent or beneficiary** button. Add a dependent or beneficiary

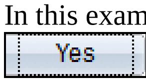


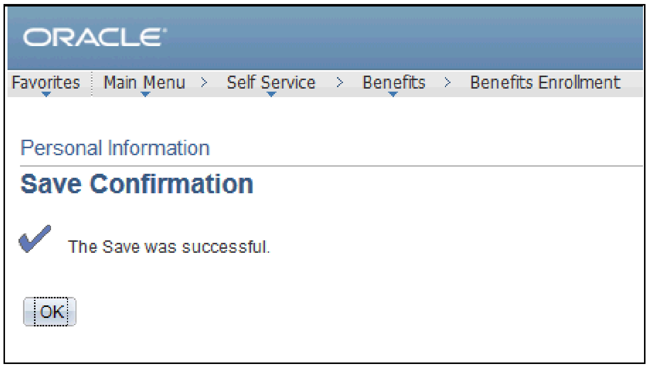
Step	Action
15.	Use the Dependent/Beneficiary Personal Information page to enter your dependent and beneficiary information.
16.	Enter the desired information into the **First Name** field.
17.	Enter the desired information into the **Last Name** field.
18.	Enter the desired information into the **Date 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.



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. 

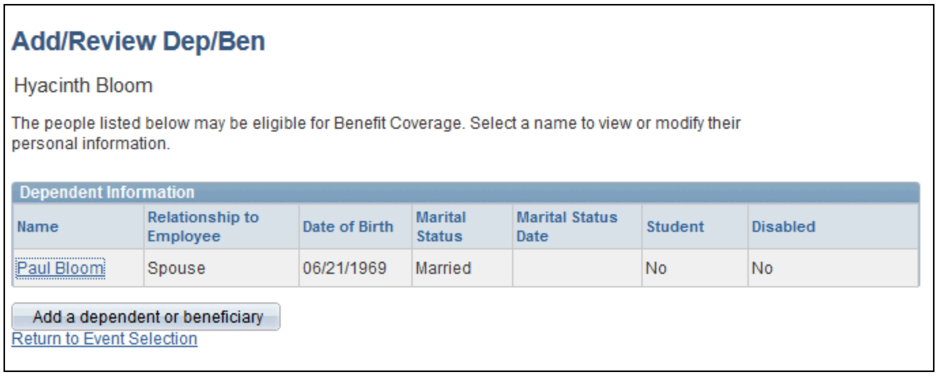


Step	Action
30.	Click the Yes button if the selected Smoker status is accurate. Click the No button to return and make any necessary edits. In this example, click the **Yes** button. 

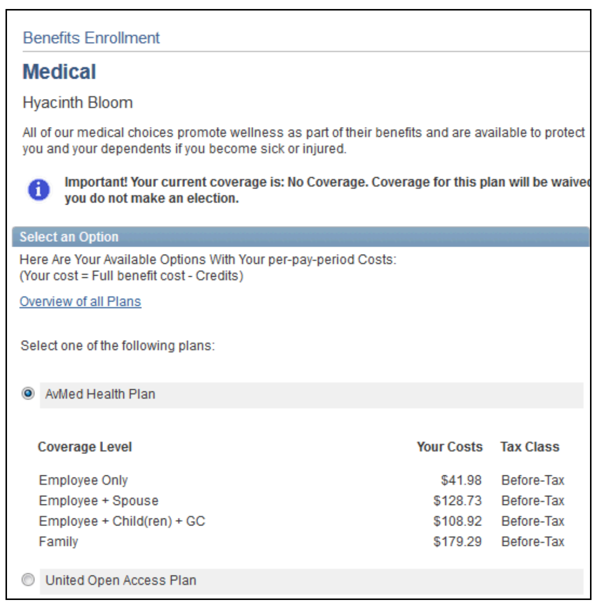


Step	Action
31.	Click the **OK** button. 

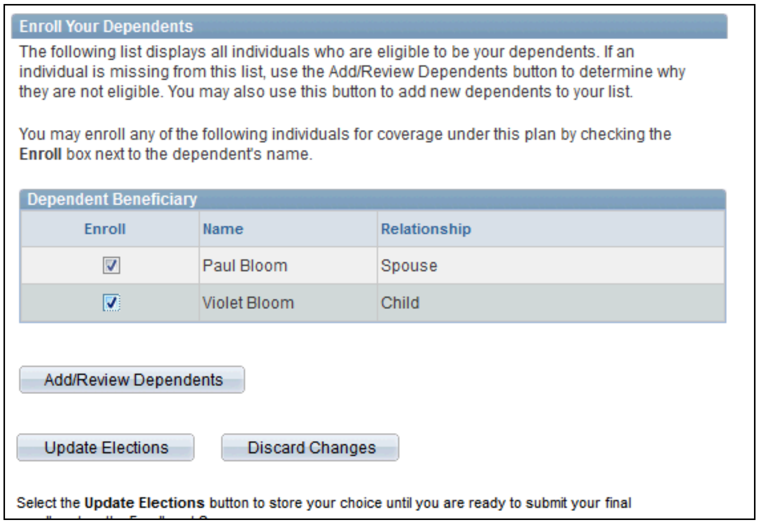
Step	Action
32.	Click the **Return to Dependent/Beneficiary Summary** link.

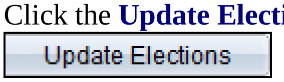


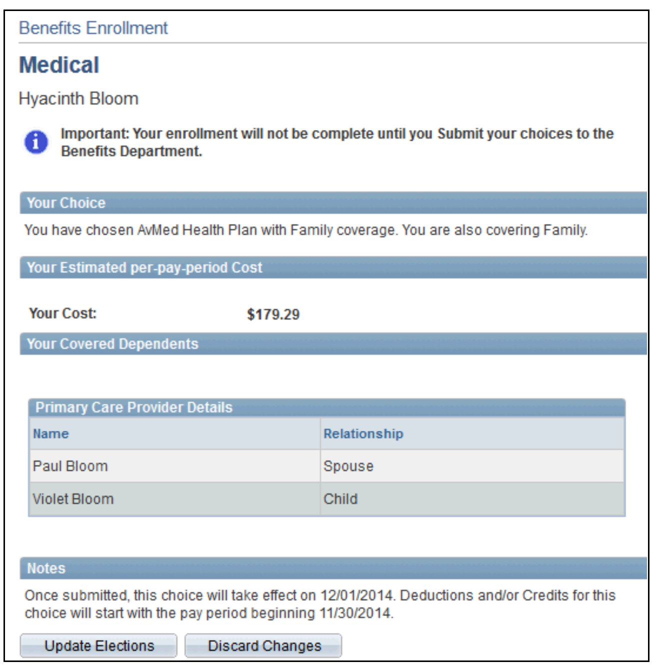
Step	Action
33.	Notice, your dependent has been successfully added. To add another dependent, repeat steps 14-32.
34.	Once you have added all dependents, click the **Return to Event Selection** link. Return to Event Selection

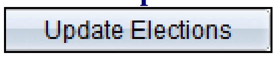


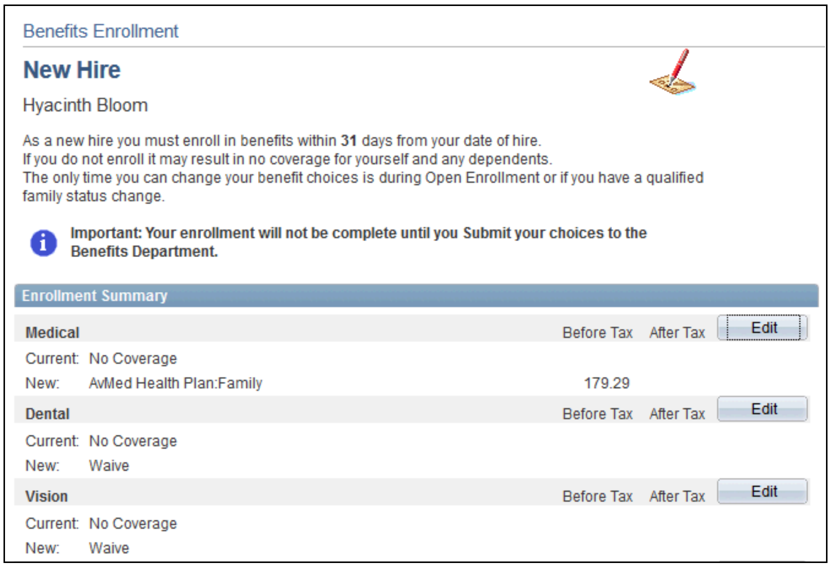
Step	Action
35.	Scroll down the page.

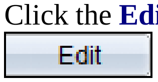


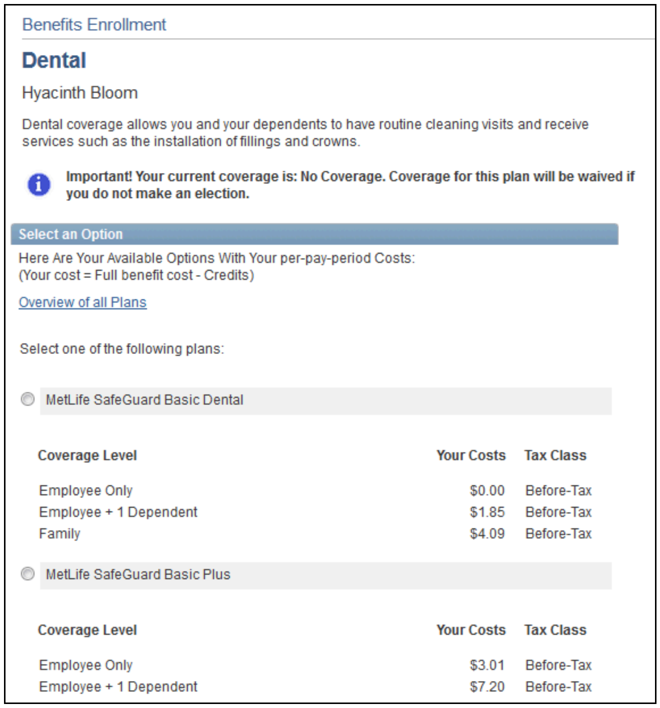
Step	Action
36.	Next, enroll those individuals you would like covered under the selected medical plan.
37.	Click the **Enroll** checkbox to the left of the appropriate dependent(s) to enroll them for medical coverage under the selected plan. 
38.	Click the **Update Elections** button. 



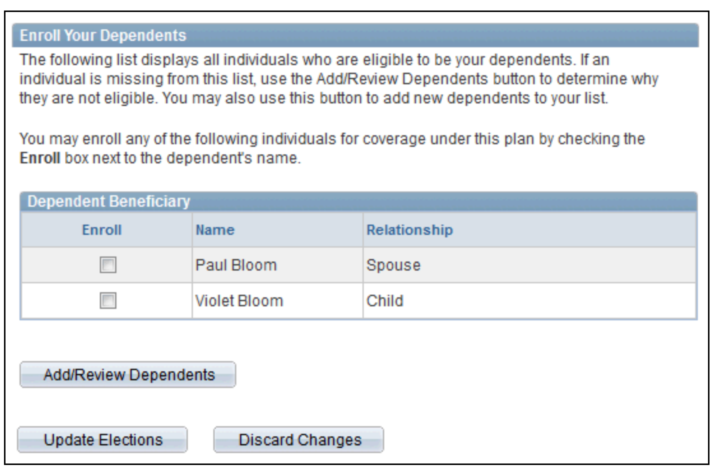
Step	Action
39.	Review your selection, including the cost and covered dependents. Click Discard Changes to return and change your choices. Click Update Elections to save your choices.
40.	Click the **Update Elections** button. 



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

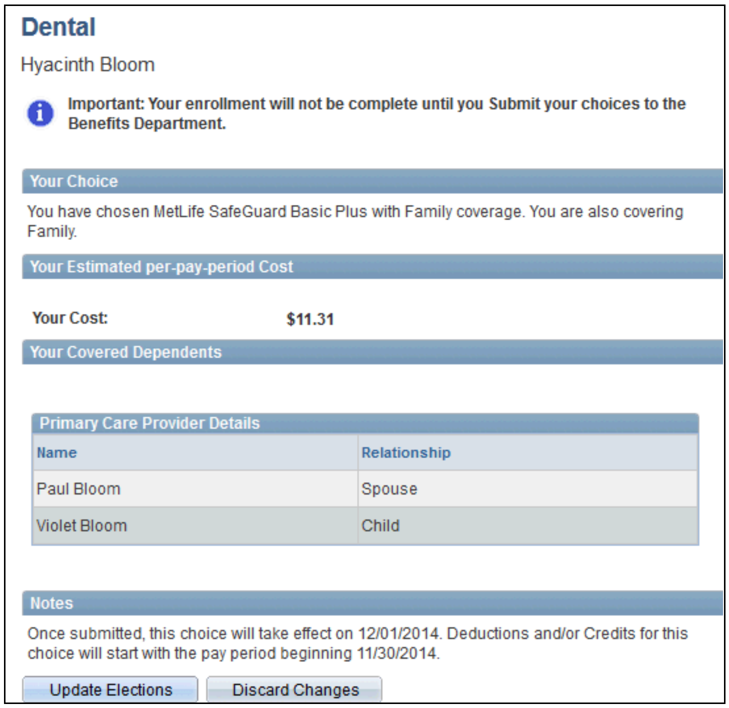


Step	Action
42.	To enroll in coverage, click the radio button to the left of the appropriate dental plan. 
43.	Scroll down the page.

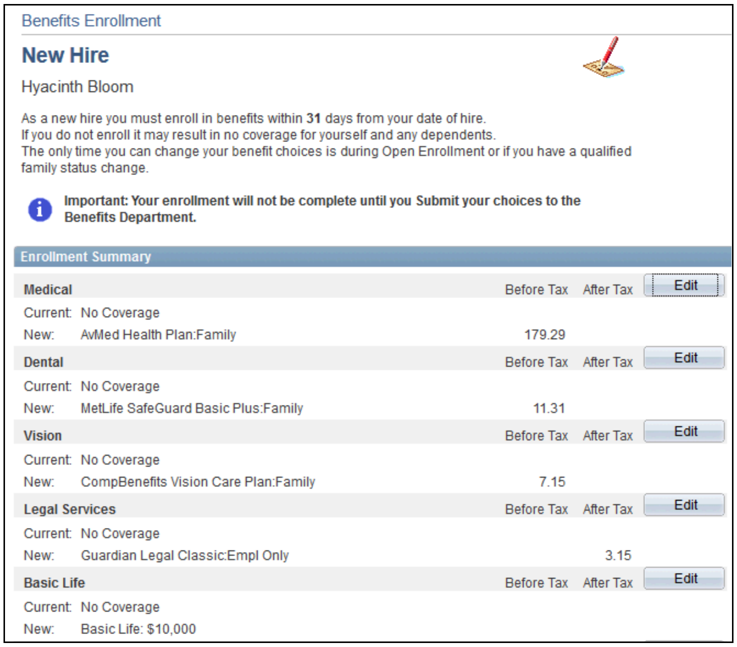


Step	Action
44.	Next, enroll those individuals you would like covered under the selected dental plan.

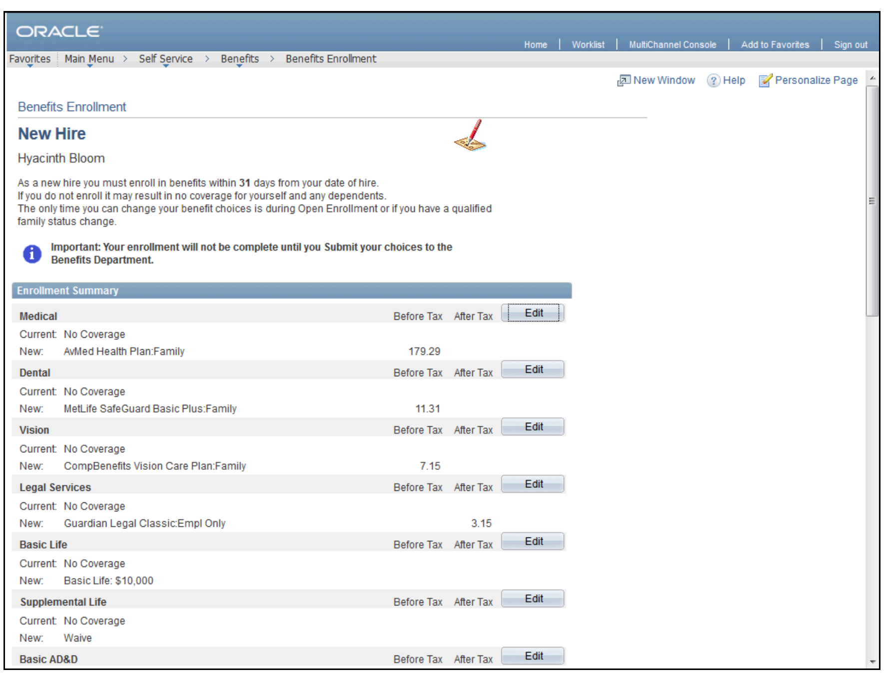
Step	Action
45.	Click the **Enroll** checkbox to the left of the appropriate dependent(s).
46.	Click the **Update Elections** button. Update Elections



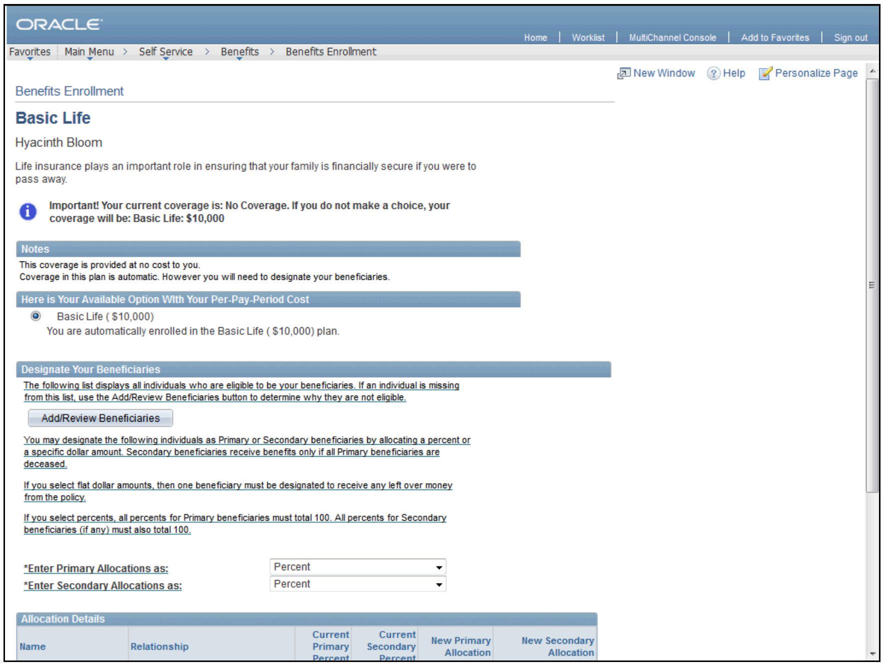
Step	Action
47.	Review your selection, including the cost and covered dependents. Click Discard Changes to return and change your choices. Click Update Elections to save your choices.
48.	Click the **Update Elections** button. Update Elections



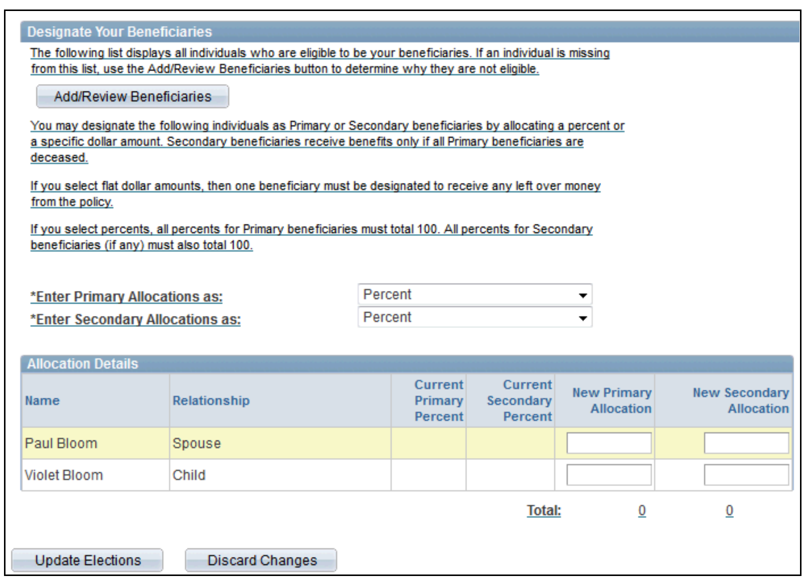
Step	Action
49.	Notice, in addition to medical and dental, coverage for vision and legal services has been edited for you. Next, you will select a beneficiary for Basic Life.

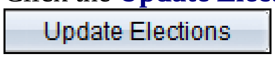


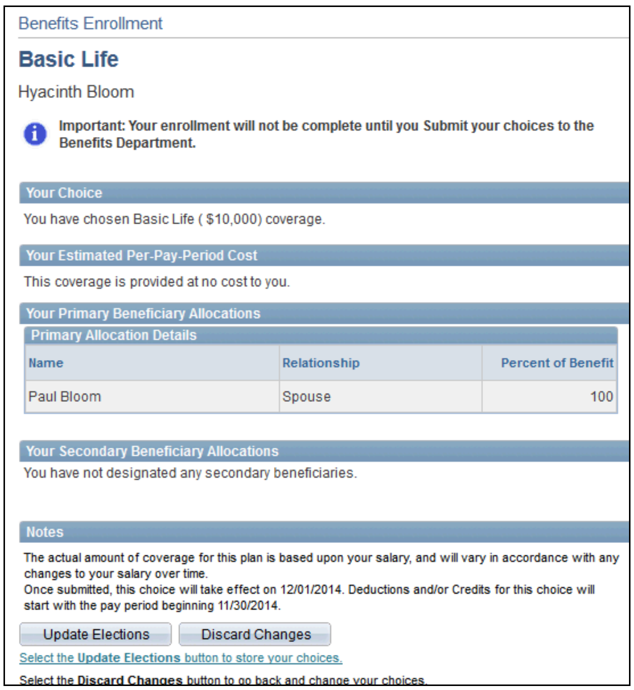
Step	Action
50.	Click the **Edit** button. 

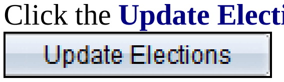


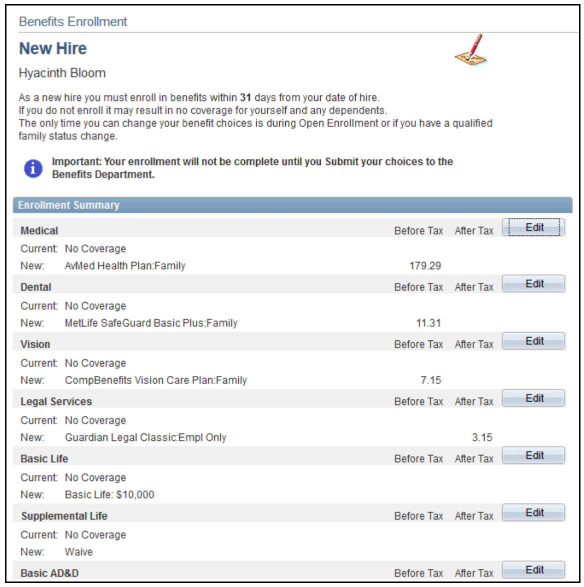
Step	Action
51.	Scroll down the page.



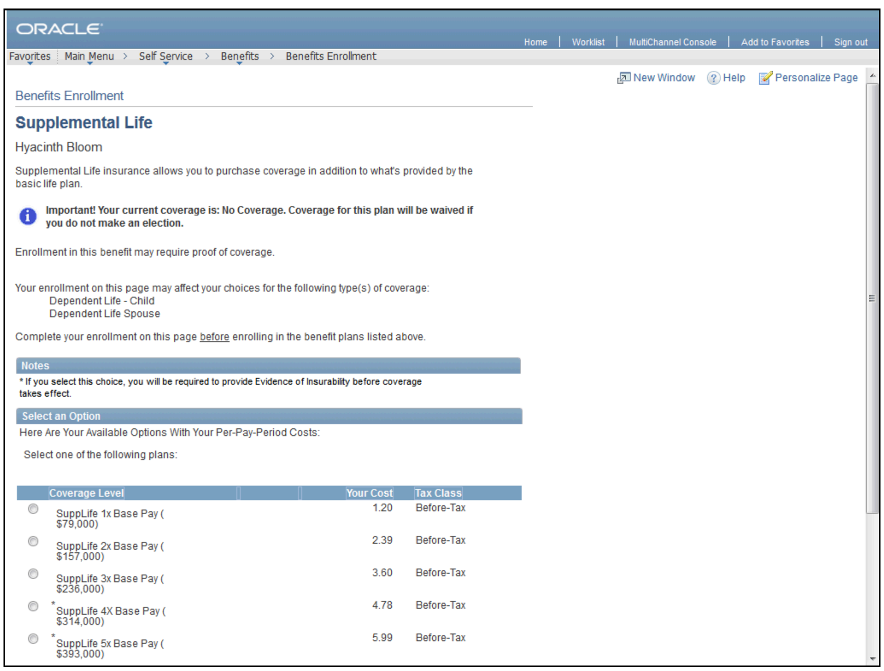
Step	Action
52.	Click the Add/Review Beneficiaries button to add a beneficiary. In this example, you are not adding any beneficiaries. You can select your existing dependents as the beneficiaries.
53.	Read the designation and allocation message for important information when selecting beneficiaries and 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. 



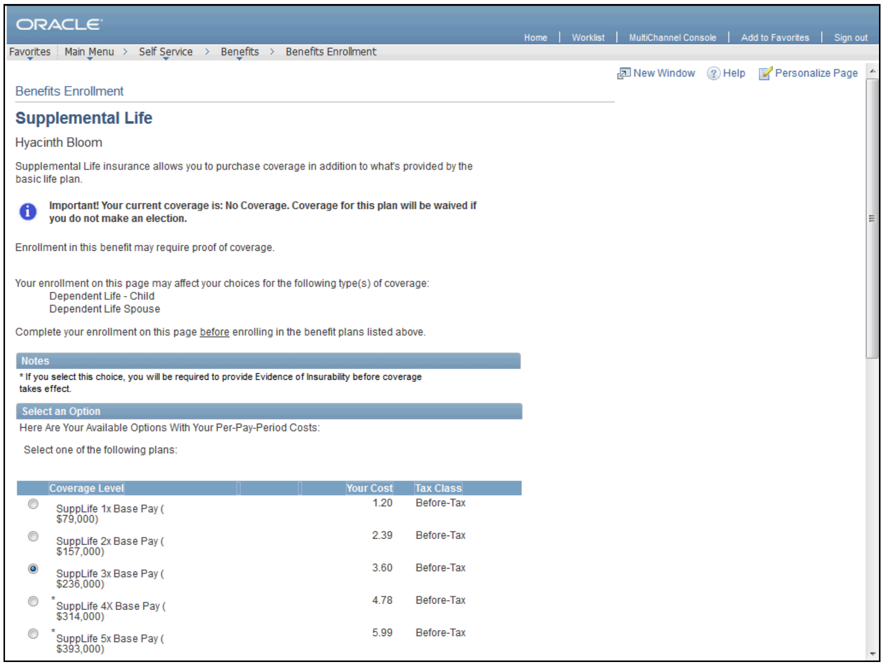
Step	Action
56.	Review your selection, including the cost and your beneficiary allocations. Click Discard Changes to return and change your choices. Click Update Elections to save your choices.
57.	Click the **Update Elections** button. 



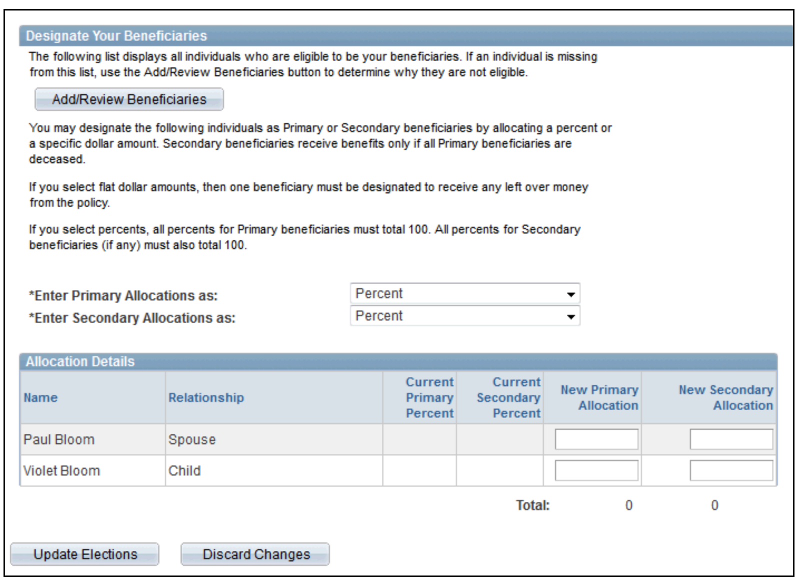
Step	Action
58.	Click the **Edit** button to the right of Supplemental Life. 



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

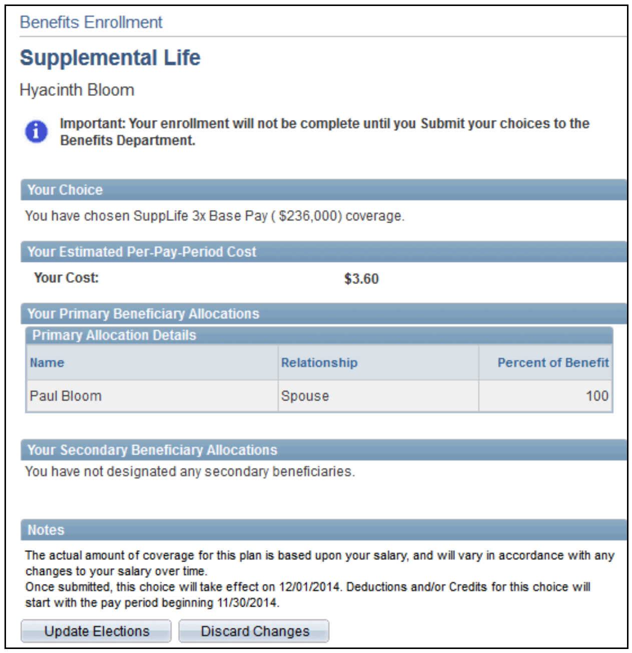


Step	Action
60.	Scroll down the page.

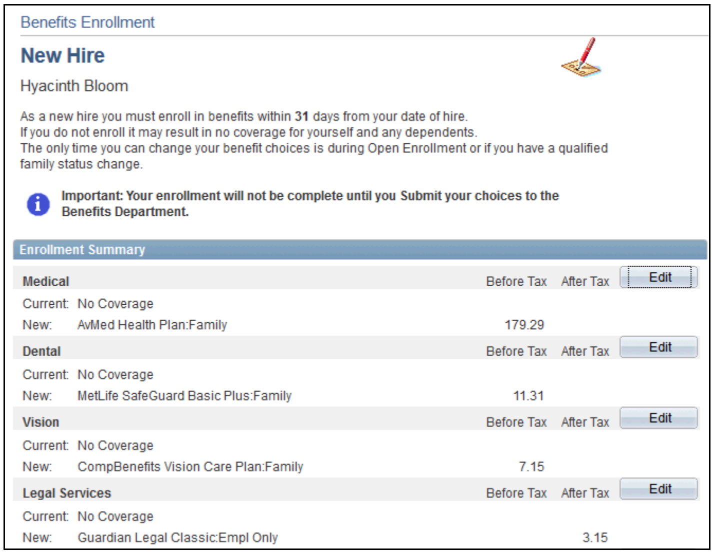


Step	Action
61.	Click the Add/Review Beneficiaries button to add a beneficiary. In this example, you are not adding any beneficiaries. You can select your existing dependents as the beneficiaries.

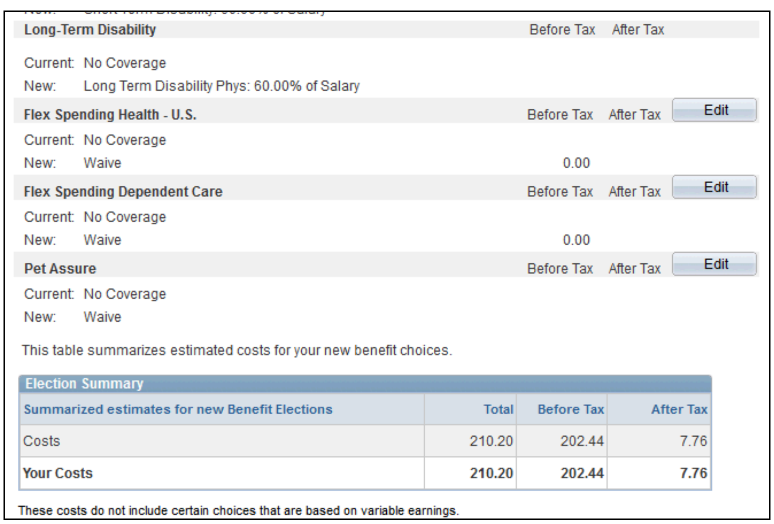
Step	Action
62.	Read the designation and allocation message for important information when selecting beneficiaries and selecting allocation details.
63.	In this example, 100% will be allocated to one beneficiary. Enter 100 in the **New Primary Allocation** field to the right of the appropriate Beneficiary.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

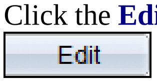


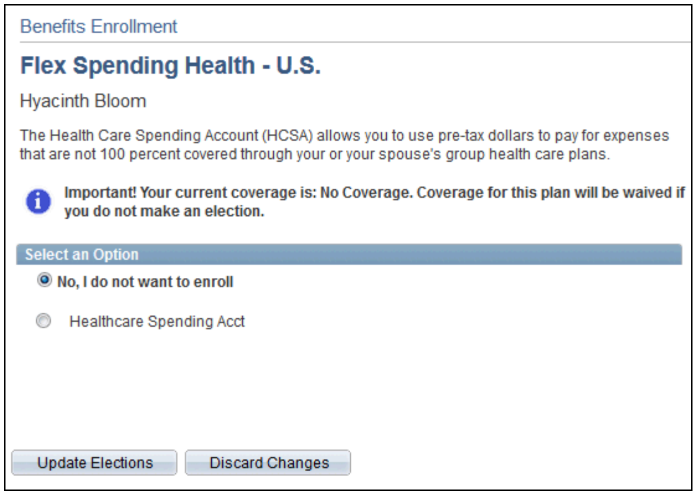
Step	Action
65.	Review your selection, including the cost and your beneficiary allocations. Click Discard Changes to return and change your choices. Click Update Elections to save your choices.
66.	Click the **Update Elections** button. Update Elections

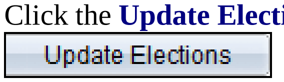


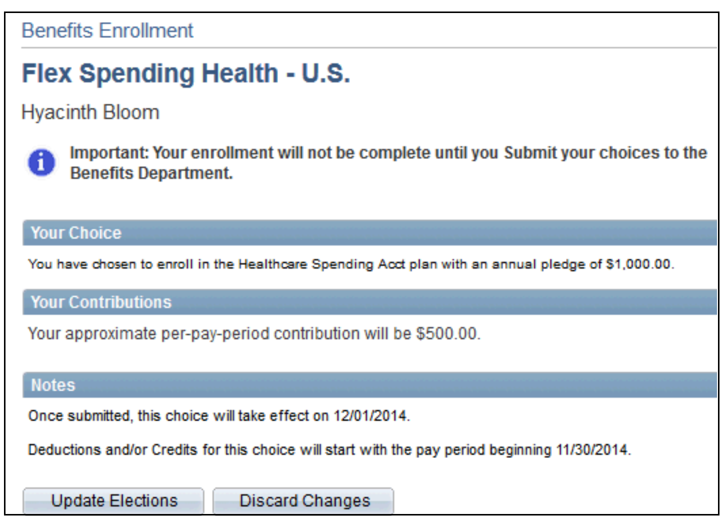
Step	Action
67.	Scroll down the page.
68.	In addition to basic and supplemental, coverage for basic AD&D, supplemental ADD, dependent life spouse, dependent life child, business travel insurance, short-term disability and long-term disability has been edited for you. Next, you will enroll in a health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

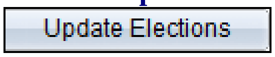


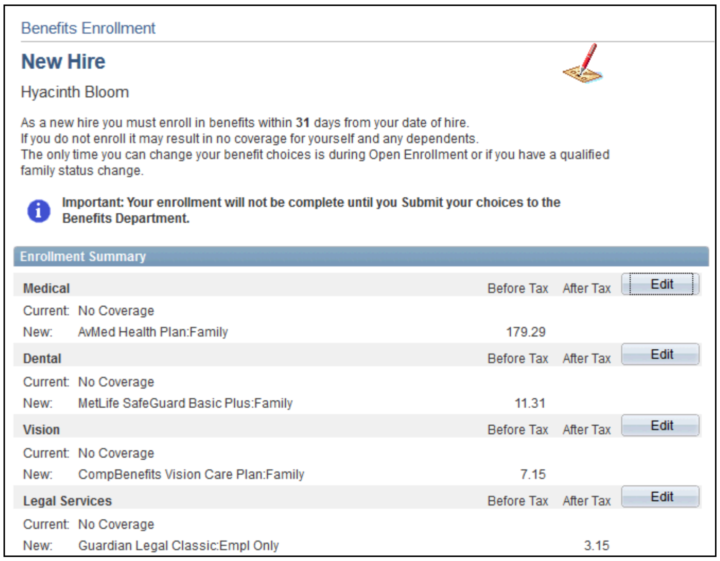
Step	Action
69.	Click the **Edit** button to the right of Flex Spending Health – U.S. 



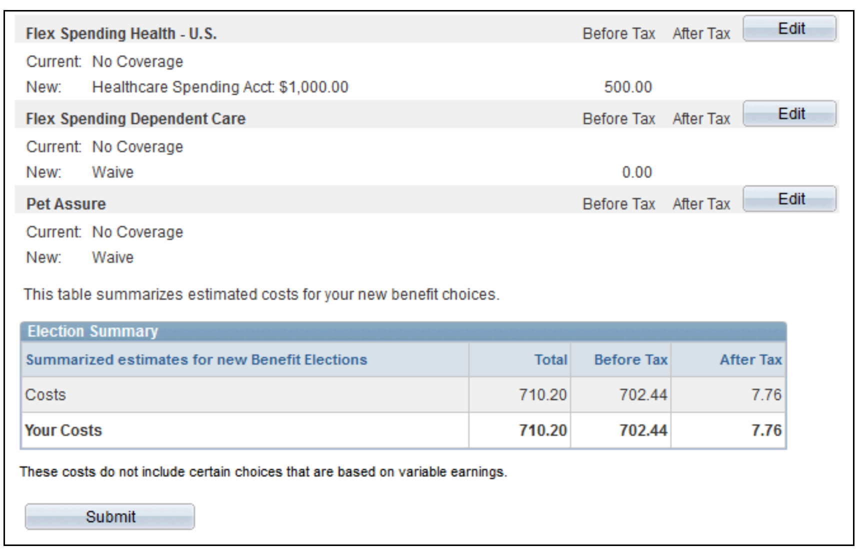
Step	Action
70.	A Health Reimbursement Account and Flex Spending Account allows you to set aside pre-tax dollars to help pay for expenses that are not 100% covered through your or your spouse's group health care plans. If you are enrolling in an FSA Account such as Health and Dependent Care, you will 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.
71.	To enroll in coverage, click the radio button to the left of Healthcare Spending Acct. 
72.	Enter the desired information into the **Annual Pledge** field.
73.	Click the **Update Elections** button. 



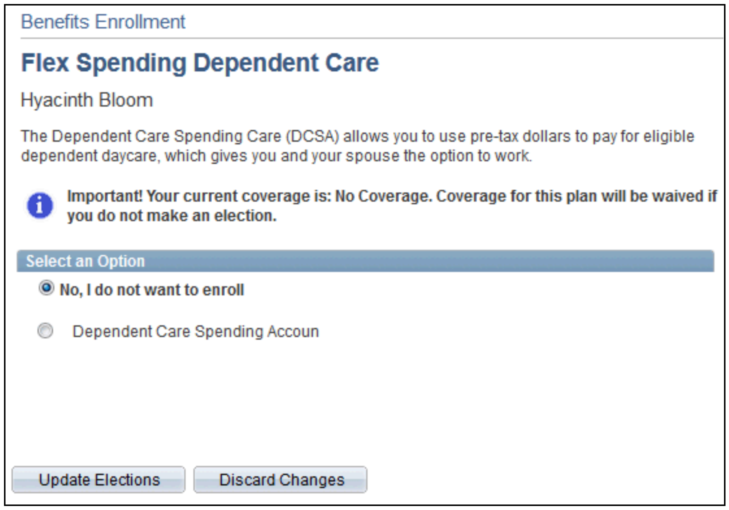
Step	Action
74.	Review your selection, including your annual and pay-per-period contribution. Click Discard Changes to return and change your choices. Click Update Elections to save your choices.
75.	Click the **Update Elections** button. 



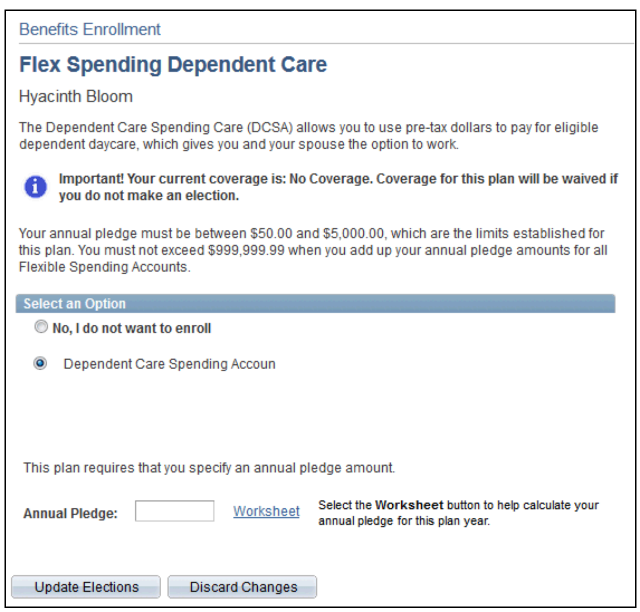
Step	Action
76.	Scroll down the page.



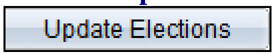
Step	Action
77.	Click the **Edit** button to the right of Flex Spending Dependent Care. 

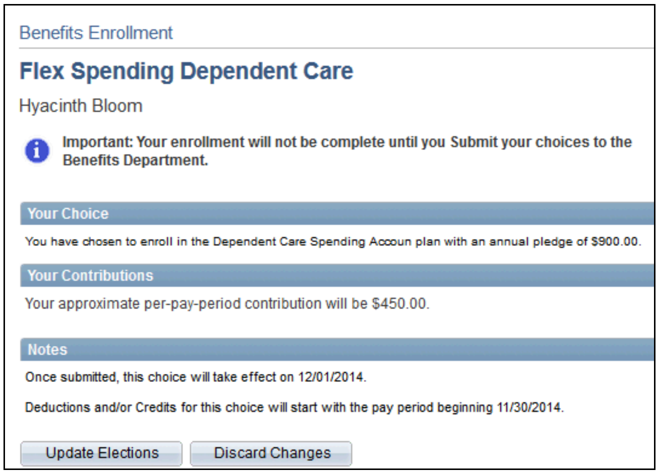


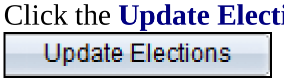
Step	Action
78.	A Dependent Care Spending Account allows you to set aside pre-tax dollars to help pay for eligible dependent daycare.
79.	To enroll in coverage, click the radio button to the left of Dependent Care Spending Account. 

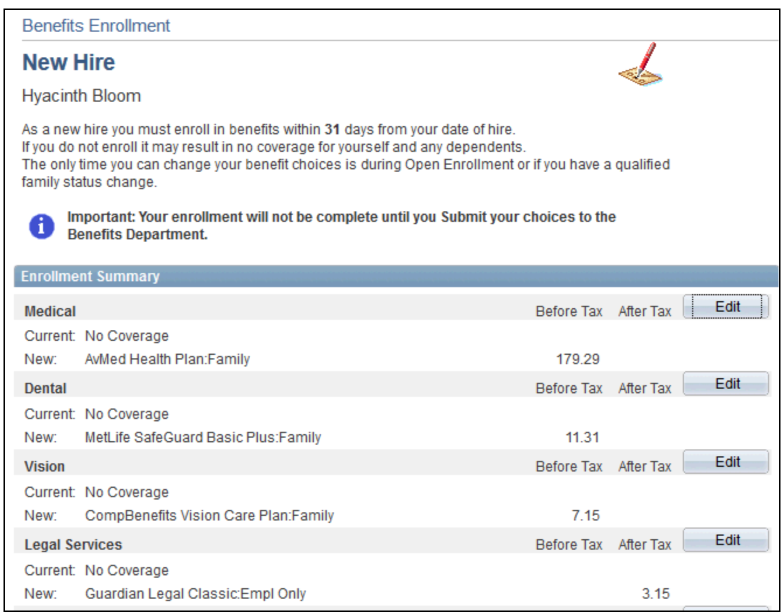


Step	Action
80.	Enter the desired information into the **Annual Pledge** field.

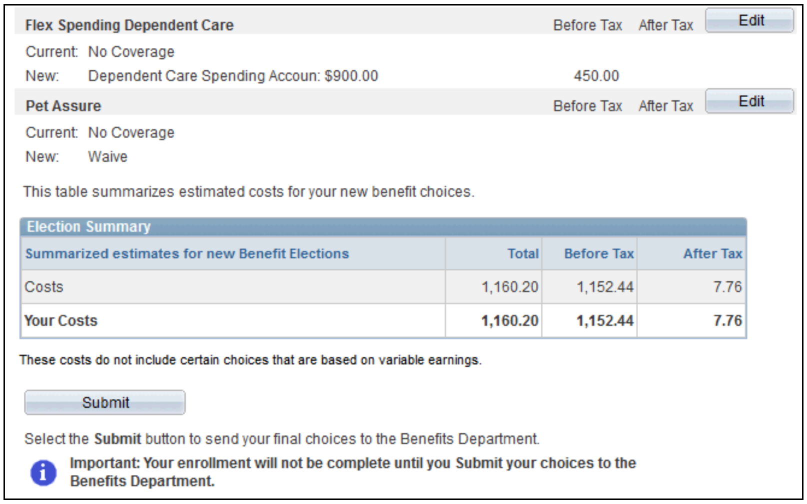
Step	Action
81.	Click the **Update Elections** button. 

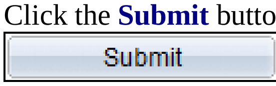


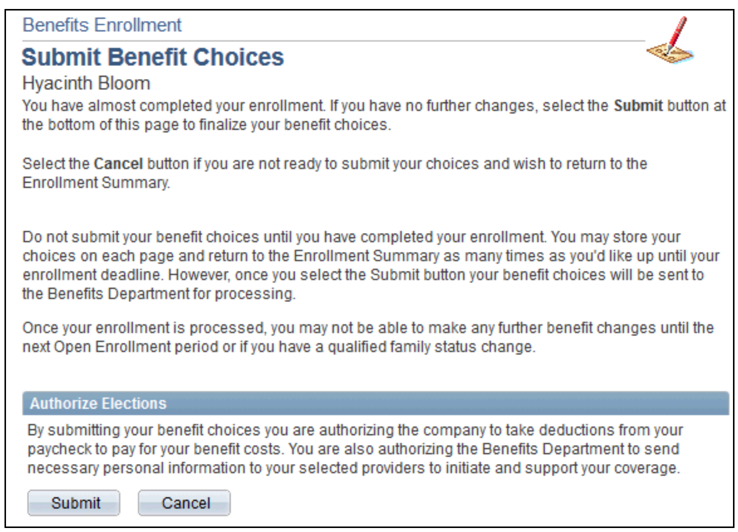
Step	Action
82.	Review your selection, including your annual and pay-per-period contribution. Click Discard Changes to return and change your choices. Click Update Elections to save your choices.
83.	Click the **Update Elections** button. 



Step	Action
84.	Scroll down the page.

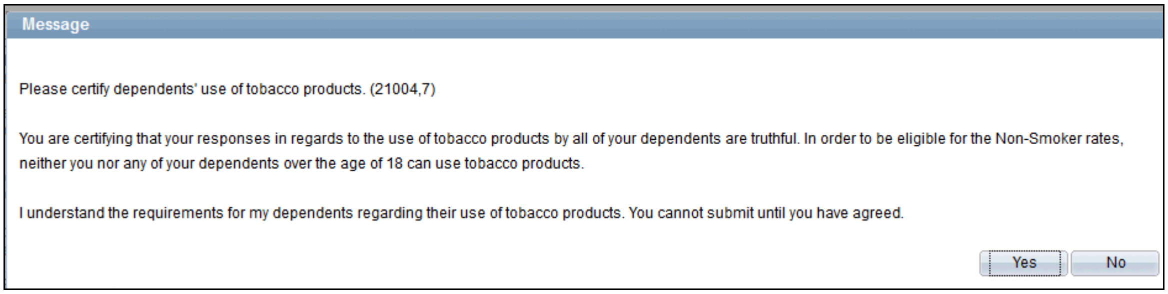


Step	Action
85.	Before submitting, be sure to review the Election Summary table. This table contains the summarized estimated costs for your new elections.
86.	Click the **Submit** button. 

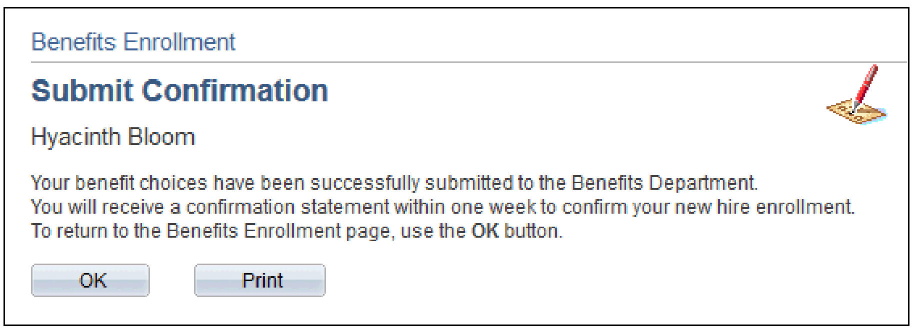


Step	Action
87.	Before submitting your benefit choices, please read the information on this page.

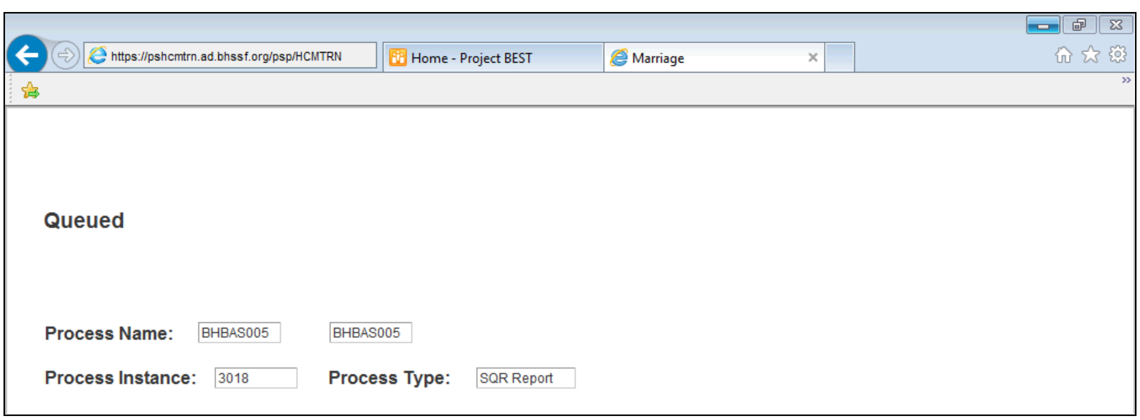
Step	Action
88.	Click the **Submit** button to send your final choices to the Benefits Department. Submit



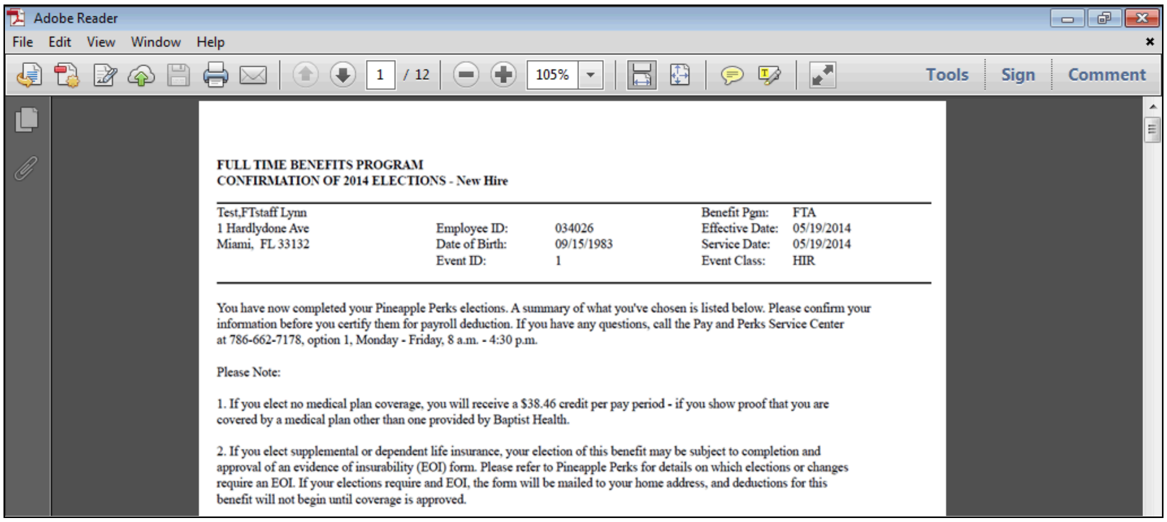
Step	Action
89.	Click the **Yes** button. Yes



Step	Action
90.	Click the **Print** button. Print



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. 



FULL TIME BENEFITS PROGRAM
CONFIRMATION OF 2014 ELECTIONS - New Hire

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

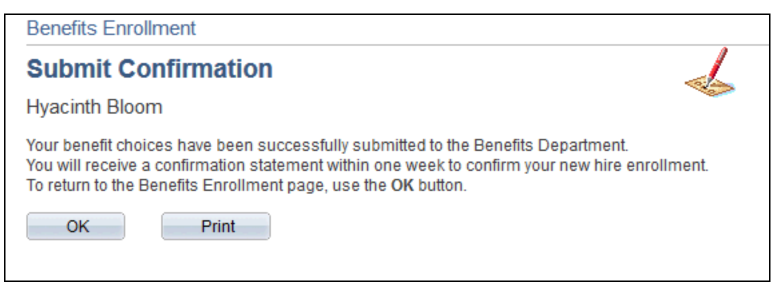
You have now completed your Pineapple Perks elections. A summary of what you've chosen is listed below. Please confirm your information before you certify them for payroll deduction. If you have any questions, call the Pay and Perks Service Center at 786-662-7178, option 1, Monday - Friday, 8 a.m. -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

Please Note:

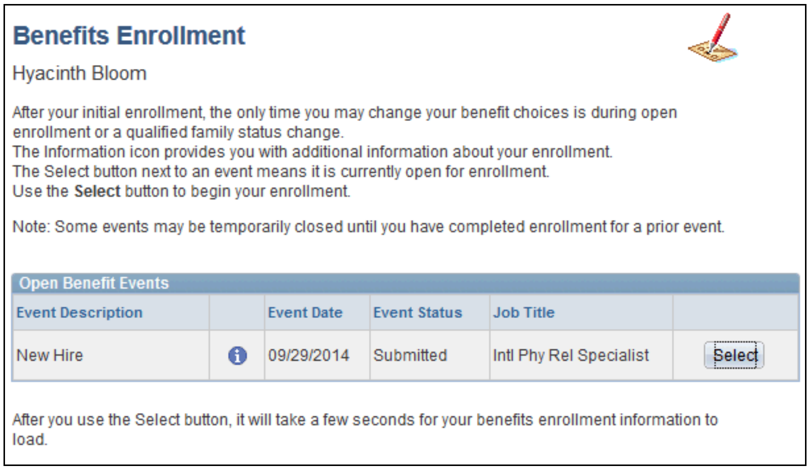
1. If you elect no medical plan coverage, you will receive a $38.46 credit per pay period - if you show proof that you are covered by a medical plan other than one provided by Baptist Health.

2. 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 and EOI, the form will be mailed to your home address, and deductions for this benefit will not begin until coverage is approved.

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. 

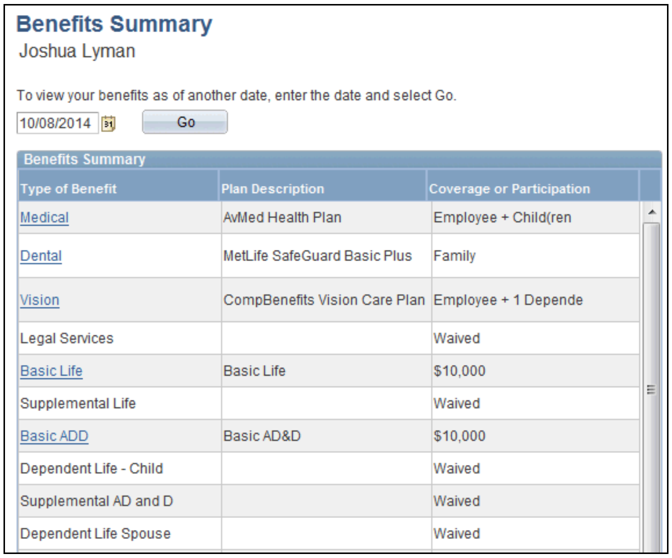


Step	Action
97.	Notice, the event status is now set to Submitted.
98.	**Congratulations.** You have elected benefits during open enrollment. **End of Procedure.**

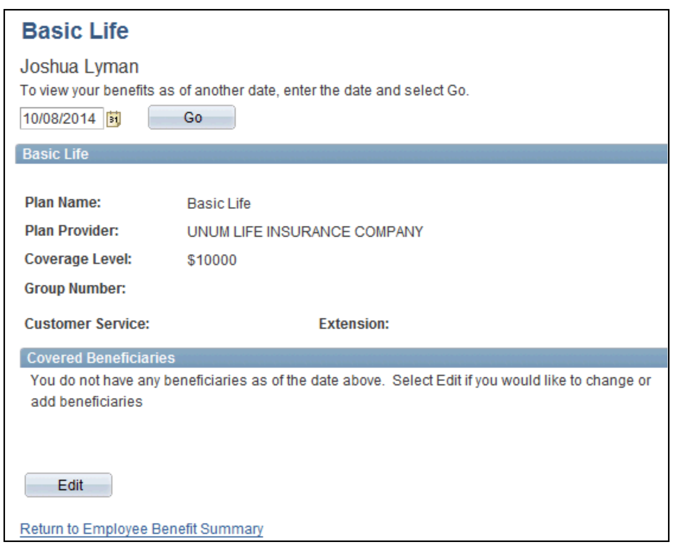
Identifying Beneficiaries

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

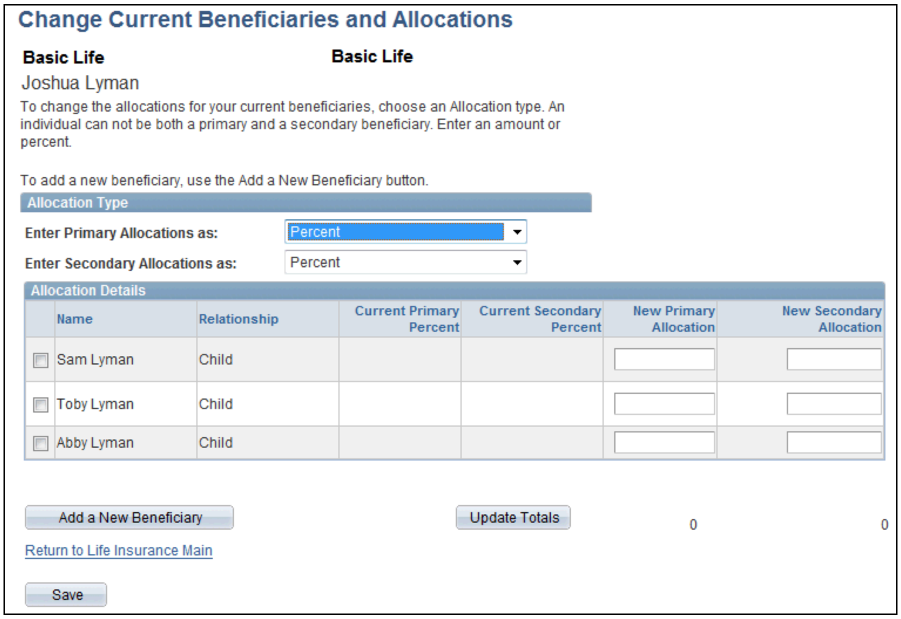
Purpose: Use this transaction to practice identifying and adding a beneficiary.



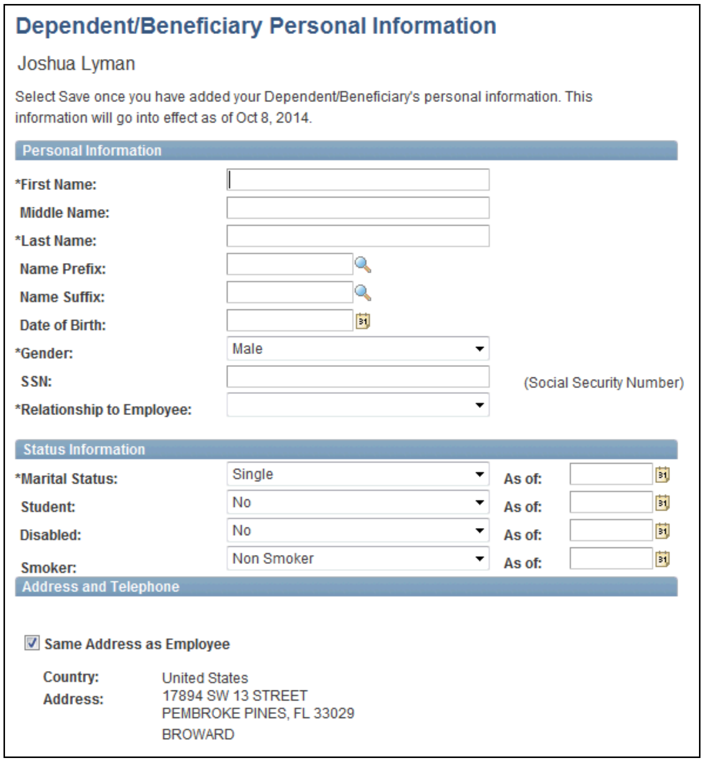
Step	Action
1.	On the Benefits Summary page, you can review your current benefit information. To add a beneficiary, click the appropriate link from the Type of Benefit column.
2.	In this example, you will add a beneficiary to Basic Life. Click the **Basic Life** link. Basic Life



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

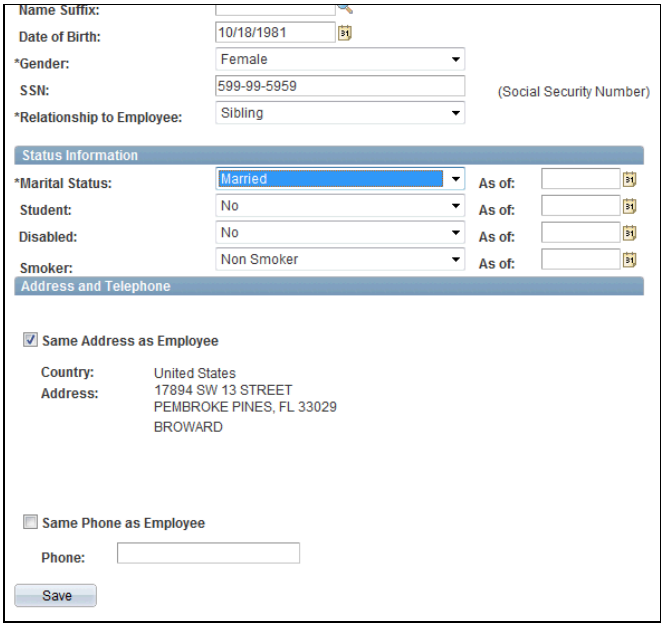


Step	Action
5.	Use the Change Current Beneficiaries and Allocations page to select beneficiaries to receive life insurance proceeds in the event of your death.
6.	Click the **Add a New Beneficiary** button. Add a New Beneficiary



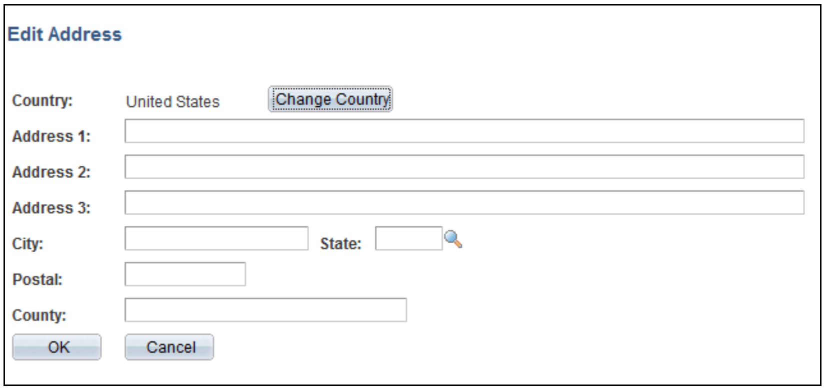
Step	Action
7.	Enter the desired information into the **First Name** field.
8.	Enter the desired information into the **Last Name** field.
9.	Enter the desired information into the **Date of Birth** field.
10.	Click the button to the right of the **Gender** field.
11.	Click the appropriate **Gender** 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.

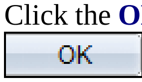
Step	Action
18.	Scroll down the page.

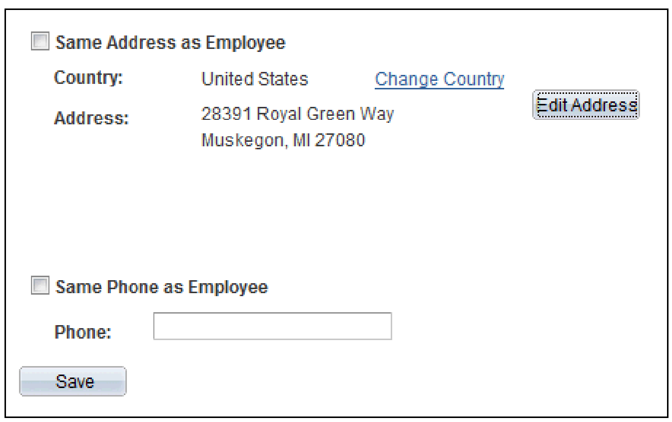


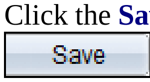
Step	Action
19.	In the Address and Telephone section, click the Same Address as Employee option if your beneficiary has the same address and/or phone number. In this example, deselect the option to enter a different address or telephone number.
20.	Deselect the **Same Address as Employee** option. 

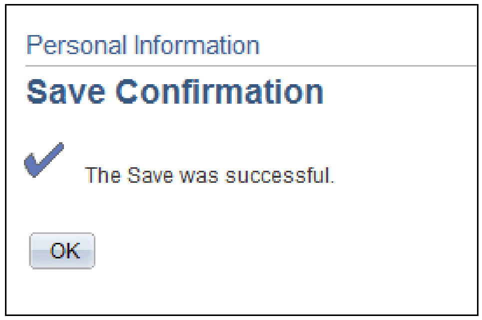
Step	Action
21.	Click the **Edit Address** button. 



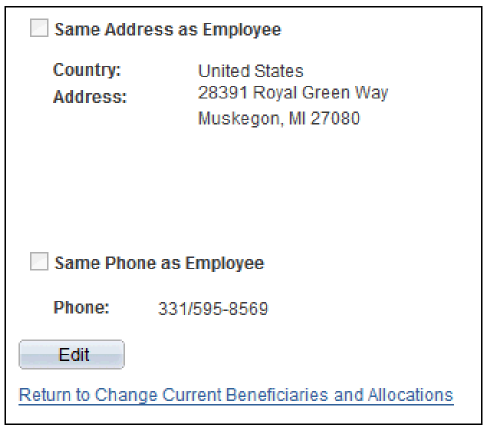
Step	Action
22.	Enter the desired information into the **Address 1** field.
23.	Enter the desired information into the **City** field.
24.	Enter the desired information into the **State** field.
25.	Enter the desired information into the **Postal** field.
26.	Click the **OK** button. 



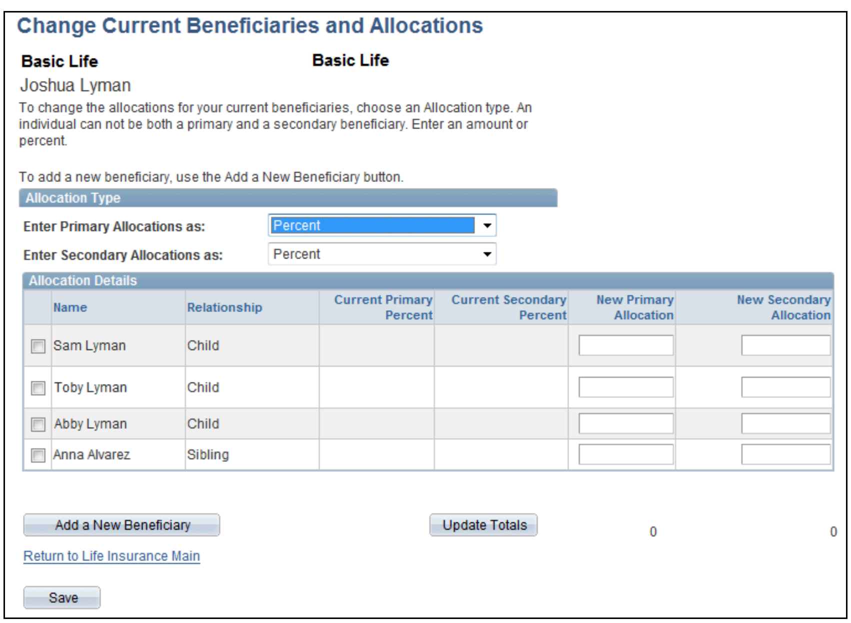
Step	Action
27.	Enter the desired information into the **Phone** field.
28.	Click the **Save** button. 



Step	Action
29.	Click the **OK** button. OK

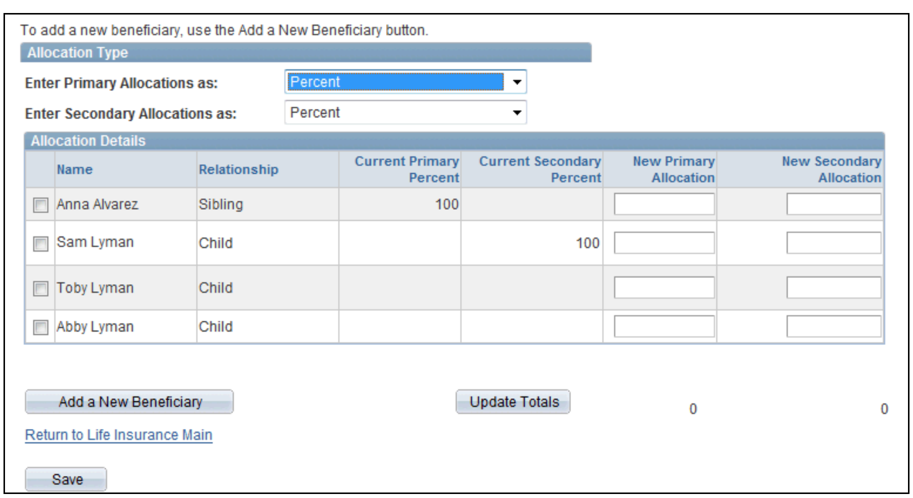


Step	Action
30.	Click the **Return to Change Current Beneficiaries and Allocations** link.

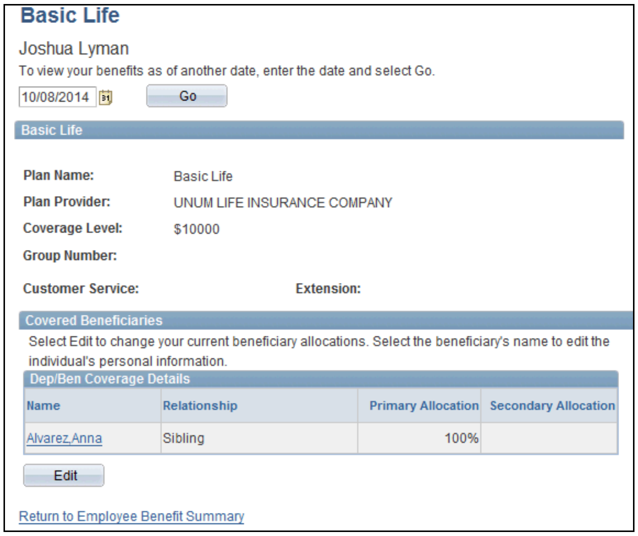


31.	You should name a primary beneficiary, as well as a contingent (secondary) beneficiary, in case your primary beneficiary dies with you. If the allocation is for more than one beneficiary, the amount must equal 100% for primary and the same will apply for the contingent beneficiaries.
32.	Click the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

Step	Action
38.	Click the **OK** button. OK



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

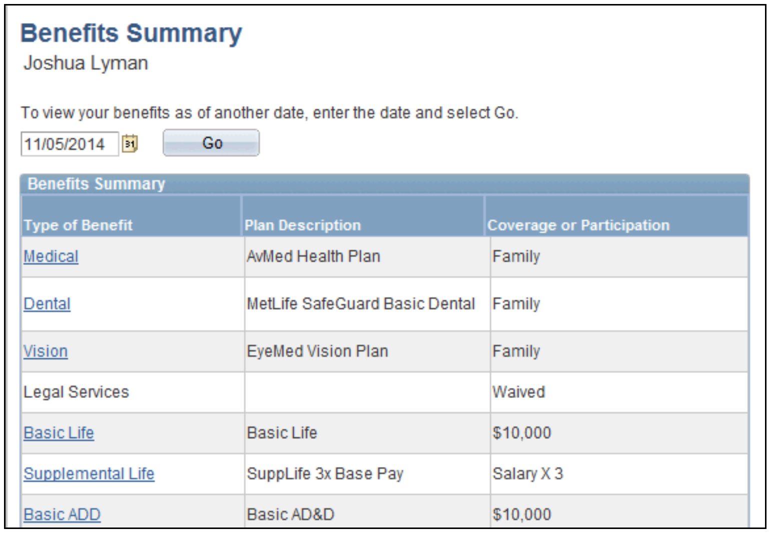


Step	Action
41.	Click the **Return to Employee Benefit Summary** link.
Step	**Action**
42.	**Congratulations.** You have identified and added a beneficiary. **End of Procedure.**

Viewing Current Benefits

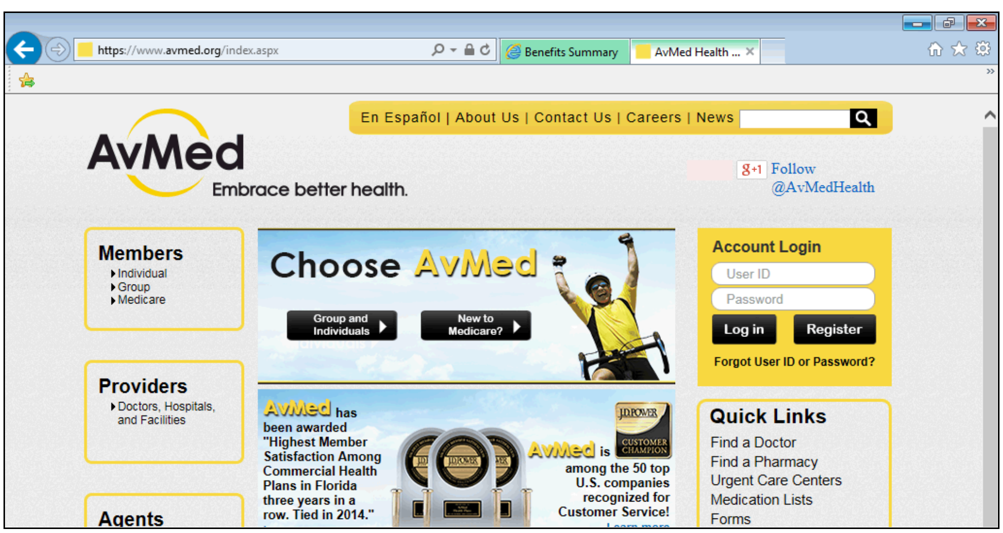
Navigation: Main Menu > HCM > Self Service > Benefits > Benefits Summary

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

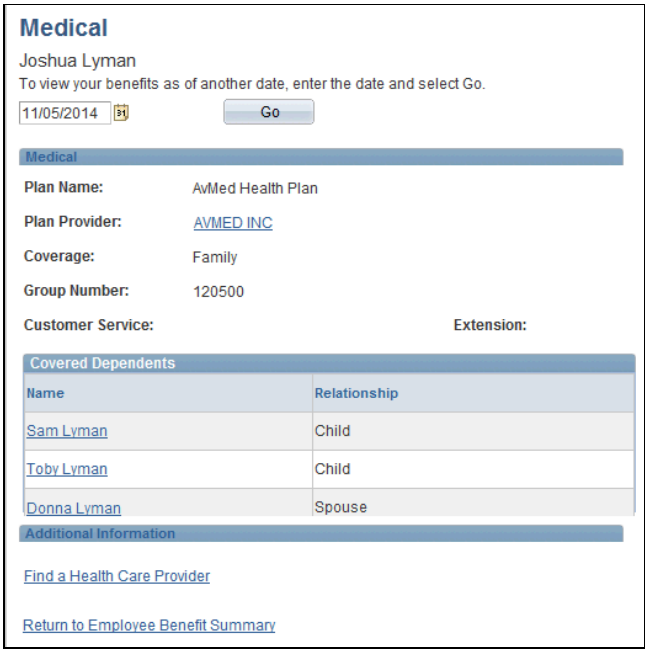


Step	Action
1.	Use the Benefits Summary page to view a list of all the benefits in which you have enrolled. This page will display different benefit types depending on which benefits an organization provides, and your current coverage.
2.	When reviewing benefits information, it is always displayed as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

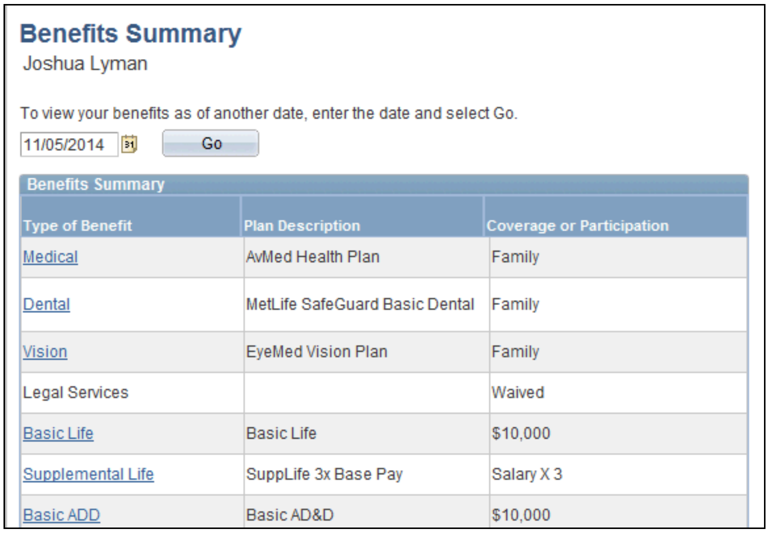
Step	Action
4.	Use the Medical page to view a summary of the current plan in which you are enrolled.
5.	From this page, you can click the Plan Provider link. This will open a new browser window that displays information about the health care provider. In this example, the current provider is AvMed Insurance.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



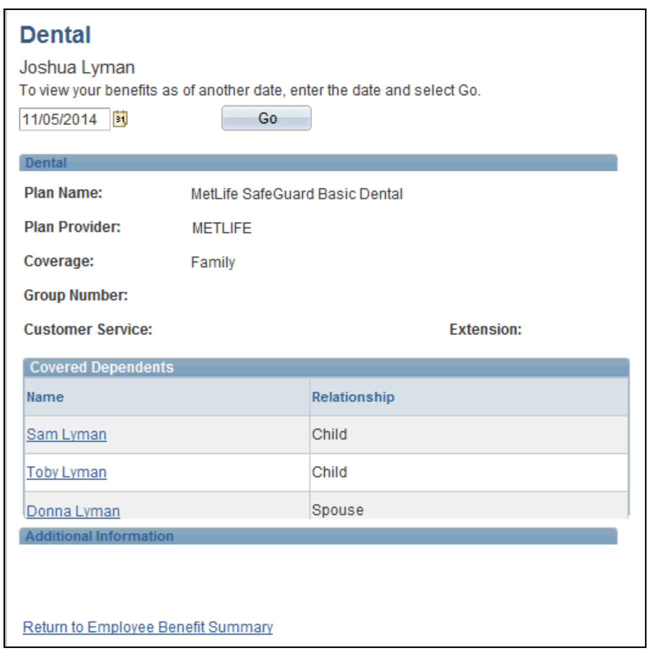
Step	Action
6.	In this example, a new browser window opens displaying AvMed. Use this window to search for information about the provider and the provider's health plans.
7.	Click the **Close** button.



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. Return to Employee Benefit Summary

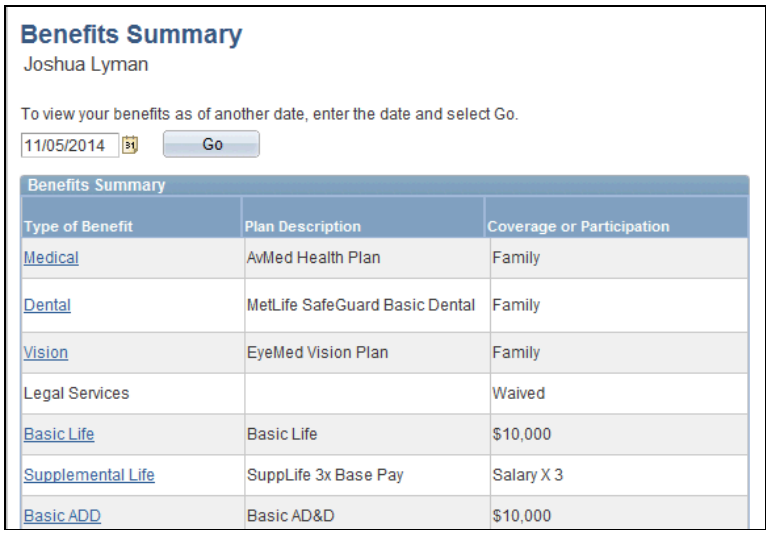


Step	Action
10.	Next, you will view your Dental benefits. Click the **Dental** link. 



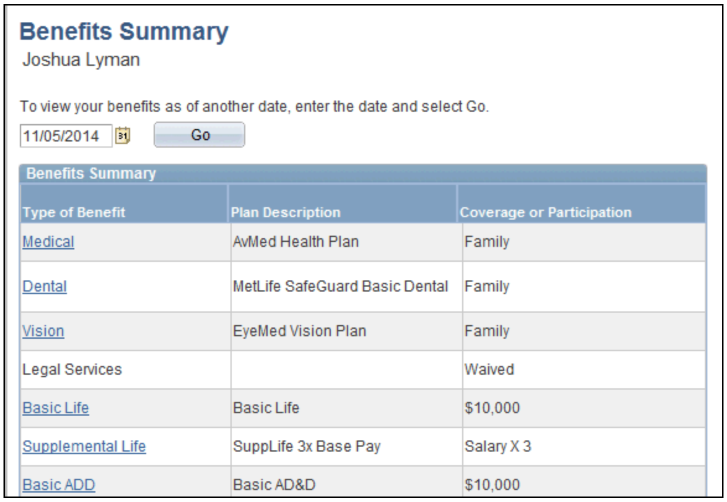
Step	Action
11.	Use the Dental page to view a summary of the current plan in which you are enrolled.

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

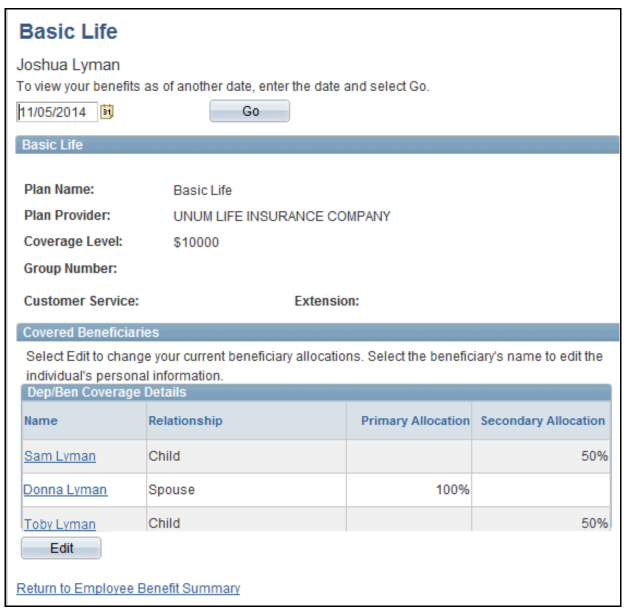


Step	Action
15.	Next, you will view your Vision benefits. Click the **Vision** link. Vision

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

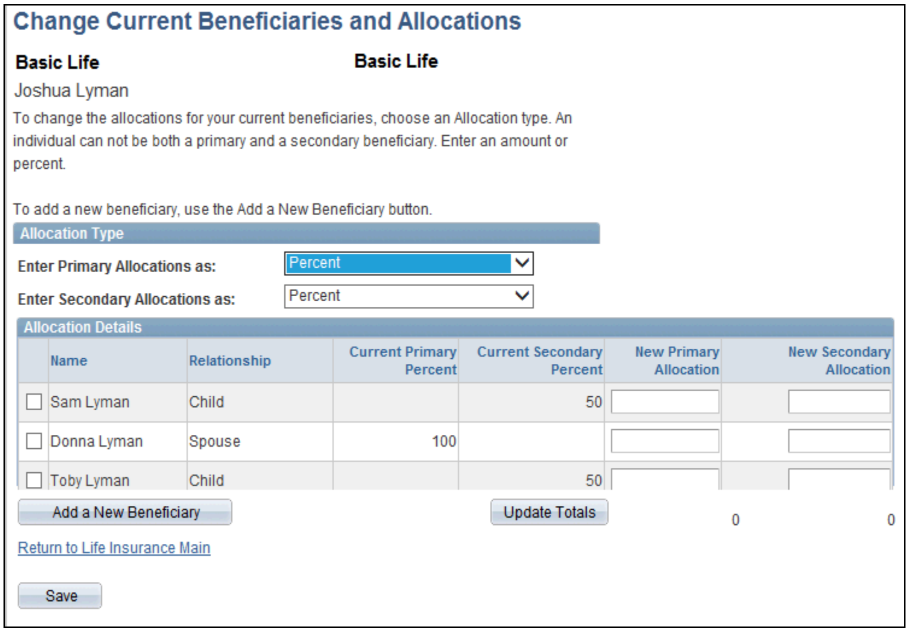


Step	Action
20.	Next, you will view your Life benefits. Click the **Basic Life** link. 

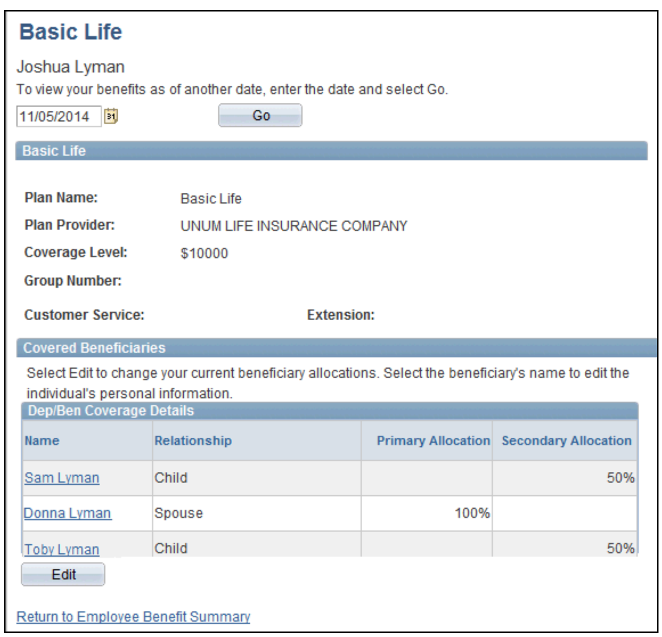


Step	Action
21.	Use the Basic Life page to view a summary of the current plan in which you are enrolled.
22.	This page also displays a list of the covered beneficiaries and his or her associated allocation percent or amount.

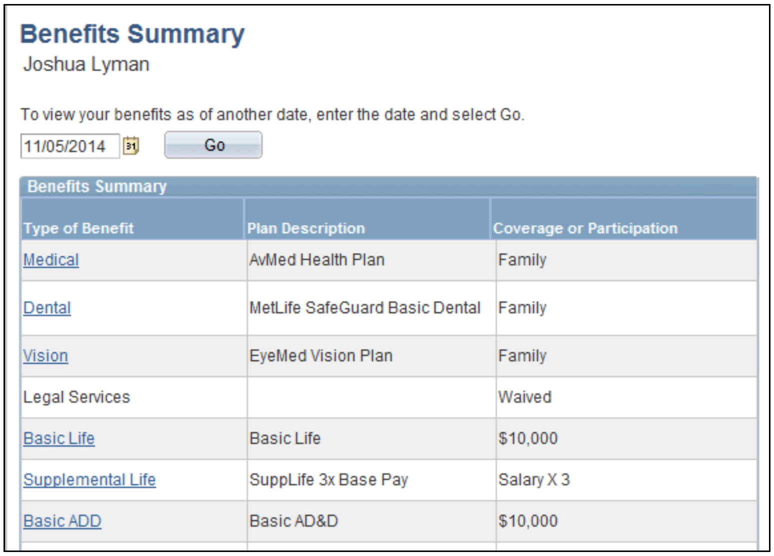
Step	Action
23.	To change the allocation, click the **Edit** button. 



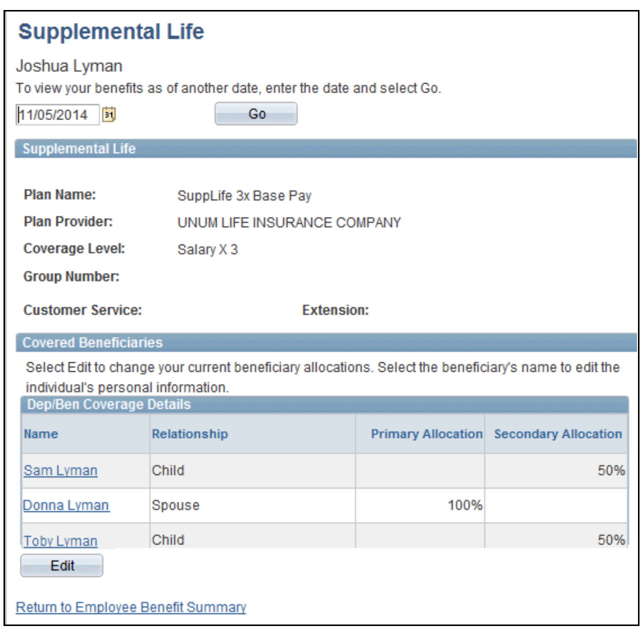
Step	Action
24.	Use the Change Current Beneficiaries and Allocations page to add new beneficiaries and modify the primary and secondary allocation percents/amounts.
25.	In this example, you do not want to make any changes. Click the **Return to Life Insurance Main** link. Return to Life Insurance Main



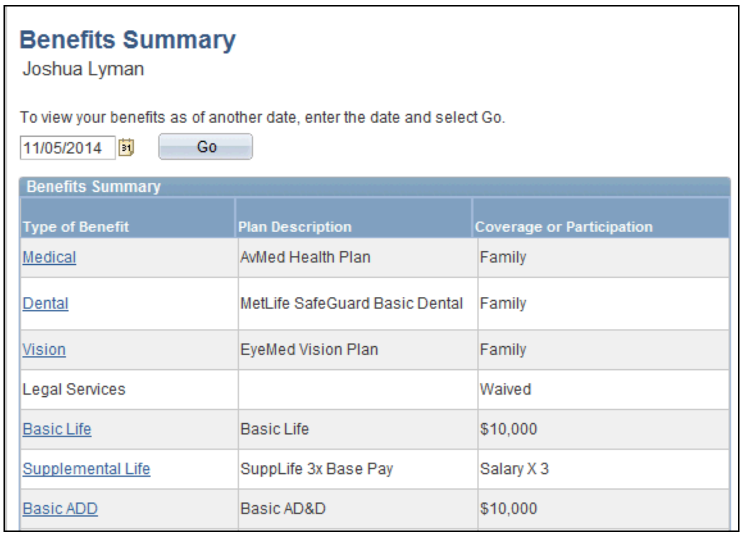
Step	Action
26.	Click the beneficiary's name to view and edit the individual's personal information.
27.	Click the **Return to Employee Benefit Summary** link. Return to Employee Benefit Summary



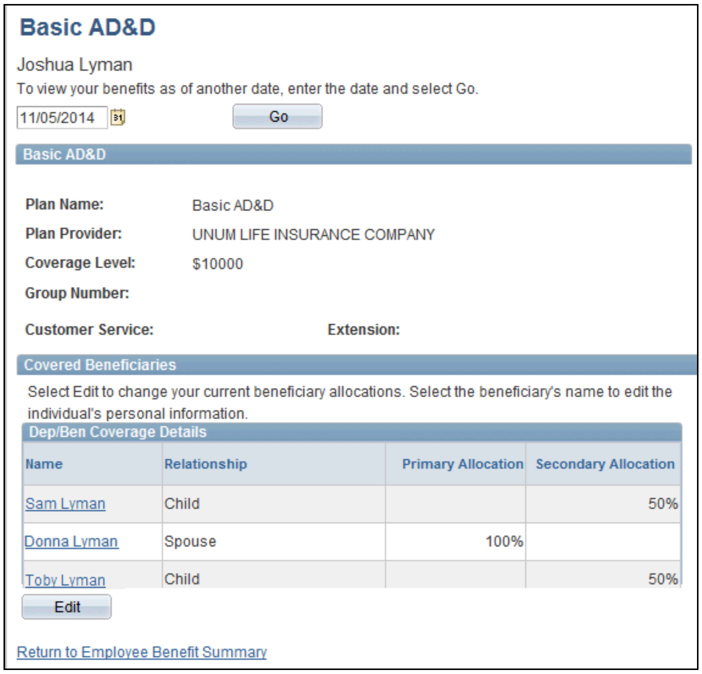
Step	Action
28.	Next, you will view your Supplemental Life benefits. Click the **Supplemental Life** link. Supplemental Life

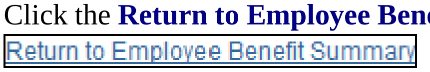


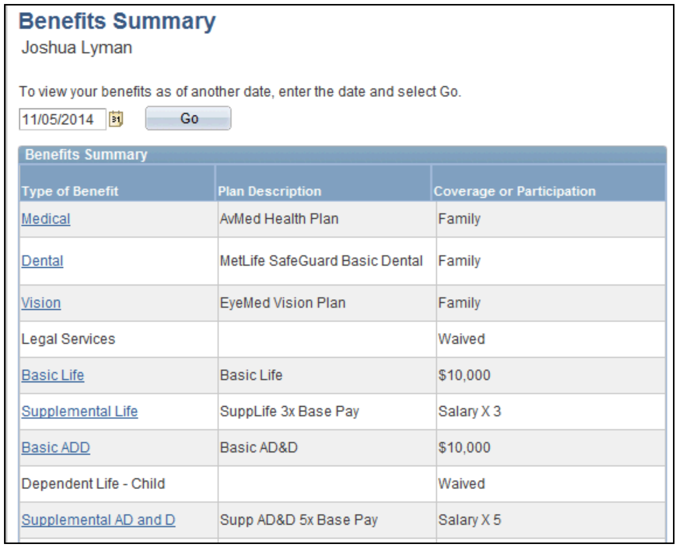
Step	Action
29.	Use the Supplemental Life page to view a summary of the current plan in which you are enrolled.
30.	This page also displays a list of the covered beneficiaries and his or her associated allocation percent or amount. Click the beneficiary's name to view and edit the individual's personal 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



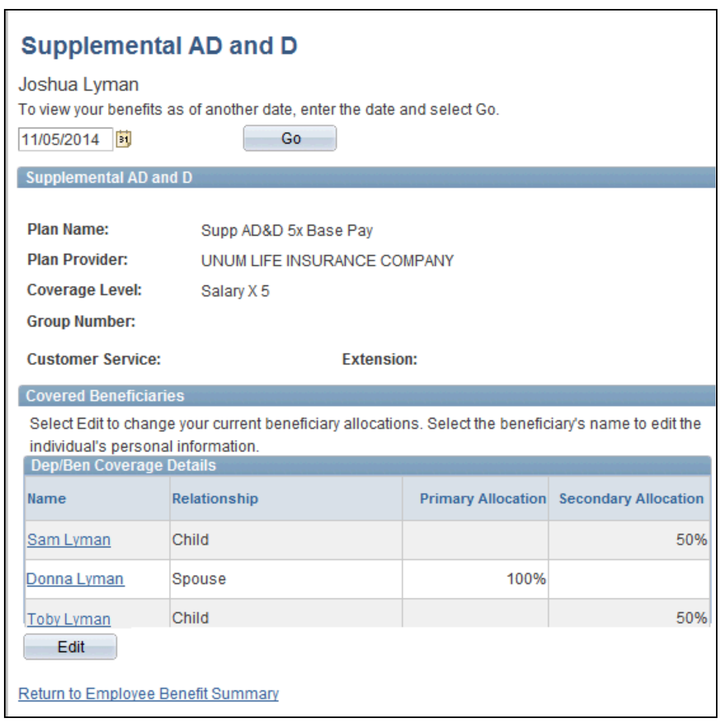
Step	Action
33.	Next, you will view your Accidental Death and Dismemberment benefits. Click the **Basic ADD** link. Basic ADD



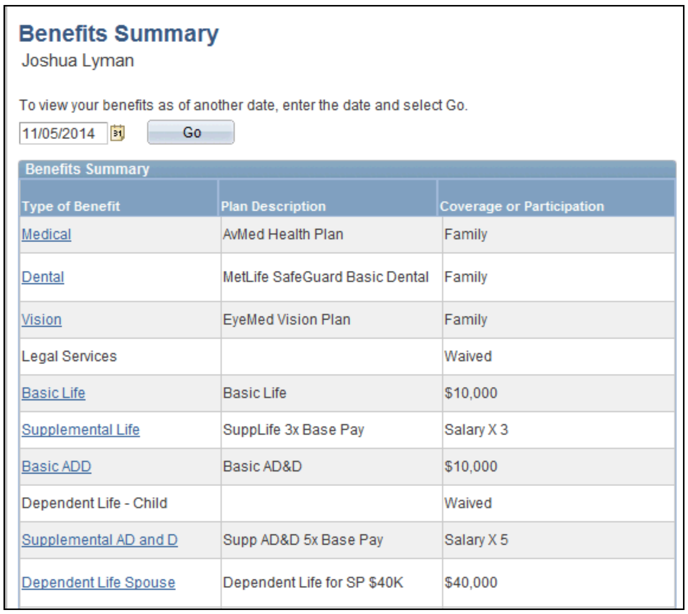
Step	Action
34.	Use the AD and D page to view a summary of the current plan in which you are enrolled.
35.	This page also displays a list of the covered beneficiaries and his or her associated allocation percent or amount. You can click the beneficiary's name to view and edit the individual's personal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



Step	Action
37.	Next, you will view your Supplemental AD and D benefits. Click the **Supplemental AD and D** link. Supplemental AD and D



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 Go

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

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. 


Benefits Summary

Joshua Lyman

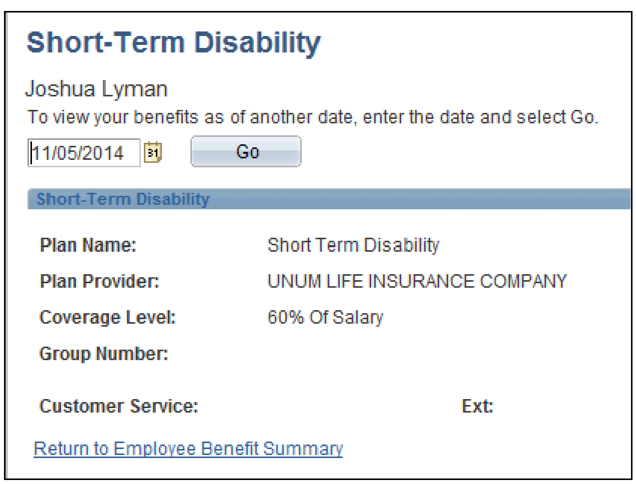
To view your benefits as of another date, enter the date and select Go.

11/05/2014 Go

Benefits Summary

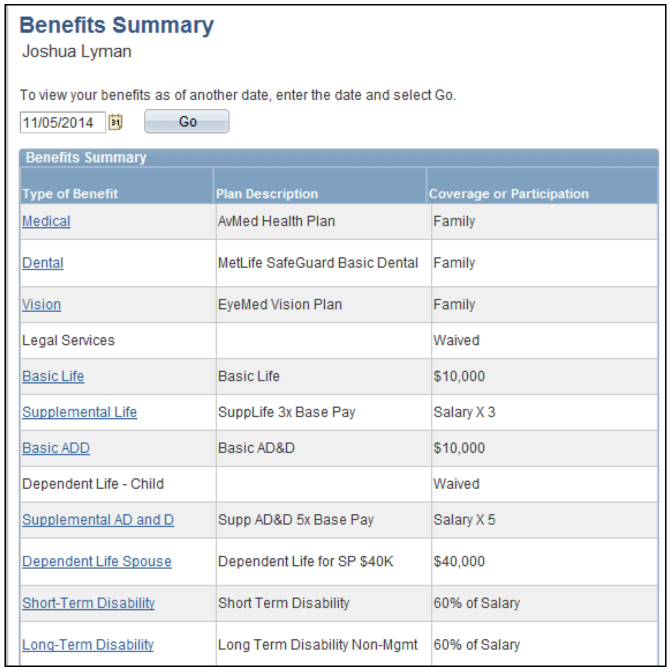
Type of Benefit	Plan Description	Coverage or Participation
Medical	AvMed Health Plan	Family
Dental	MetLife SafeGuard Basic Dental	Family
Vision	EyeMed Vision Plan	Family
Legal Services		Waived
Basic Life	Basic Life	$10,000
Supplemental Life	SuppLife 3x Base Pay	Salary X 3
Basic ADD	Basic AD&D	$10,000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



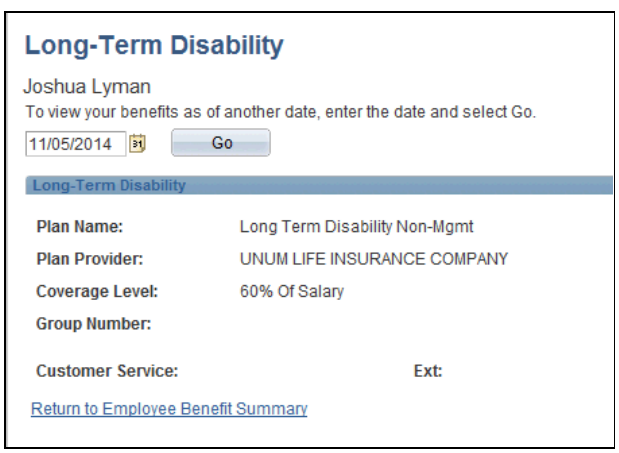
Step	Action
45.	Use the Short-Term Disability page to view a summary of your short-term disability benefit plan.

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



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



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

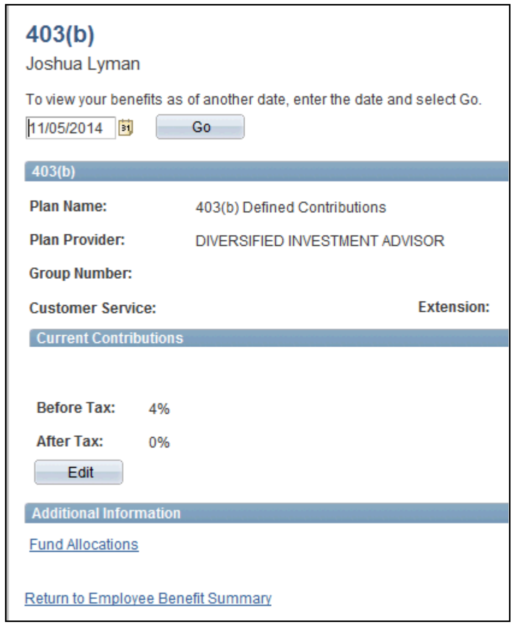
To view your benefits as of another date, enter the date and select Go.

11/05/2014 Go

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)



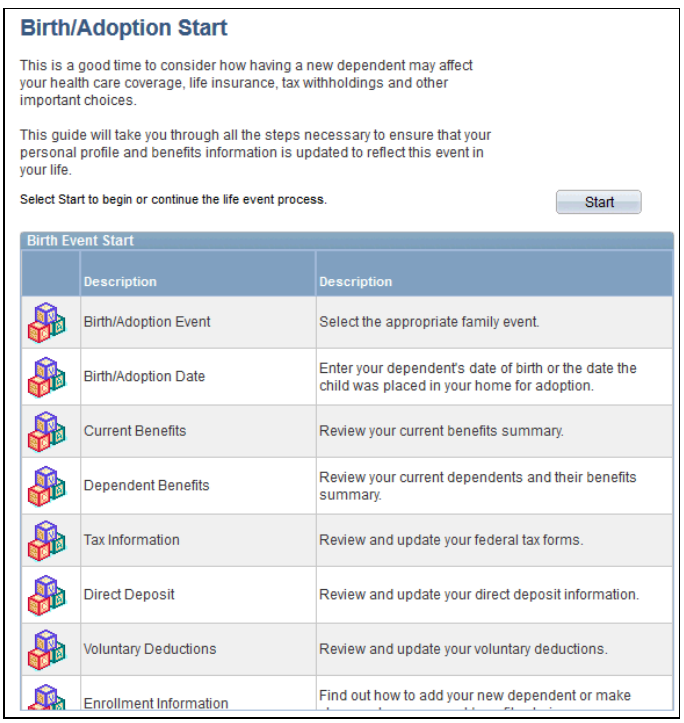
Step	Action
51.	The 403(b) page summarizes the current plan in which you are enrolled. This is a view only page as all elections are made directly with the vendor.
52.	Click the **Return to Employee Benefit Summary** link. Return to Employee Benefit Summary
53.	**Congratulations.** You have successfully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

Updating Benefit Elections - Life Event (Birth)

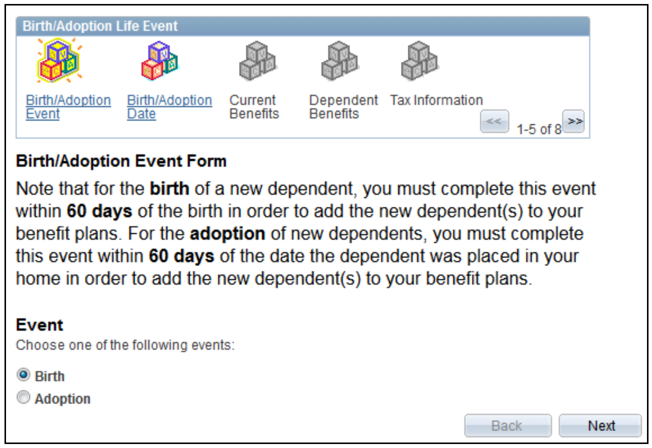
Navigation: Main Menu > HCM > Self Service > Benefits > Life Events > Birth/Adoption

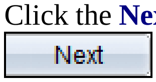
Purpose: Use this transaction to practice entering a life event and updating benefit elections as a result of the birth or adoption of a child.

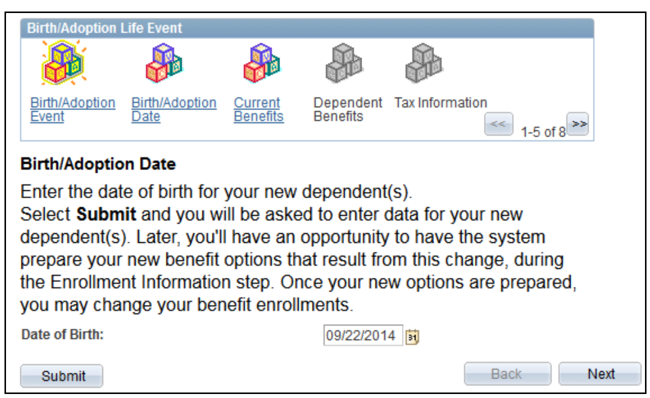
Step	Action
1.	In this example, an employee is adding their new baby girl. We have signed into the PeopleSoft system as the employee (Daisy Plant) and will navigate through the process of adding the new dependent. There are a number of pages used to add a dependent. The steps involved in this process 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.	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. 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.



Step	Action
3.	Click the **Start** button. 

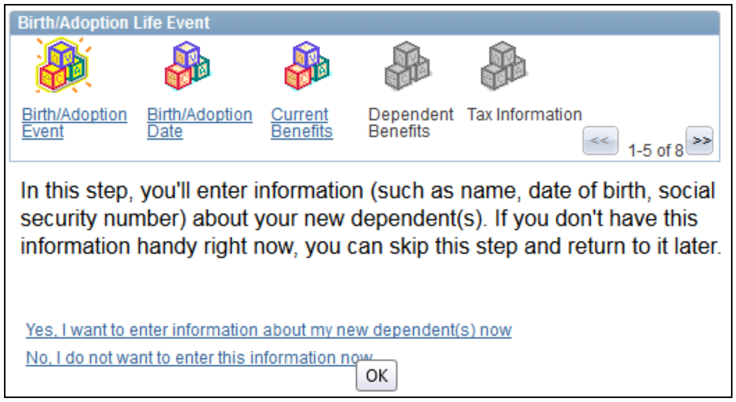


Step	Action
4.	Begin by entering the birth or adoption information. First, select either birth or adoption. In this exercise, Daisy has given birth to a daughter. Birth is the default.
5.	The first step is complete. Notice that the steps are displayed at the top of the page. The current step is active 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. 

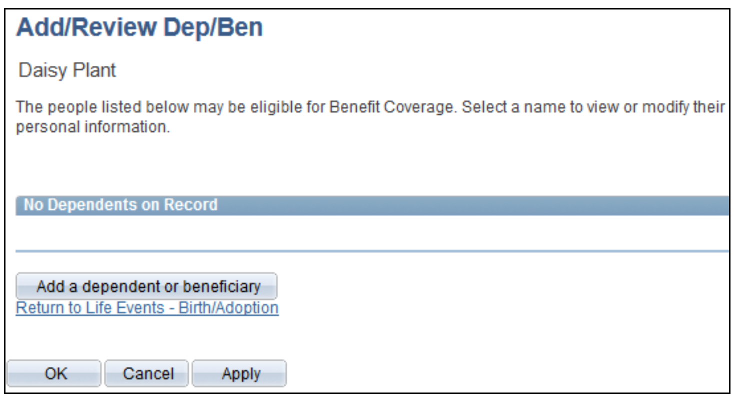


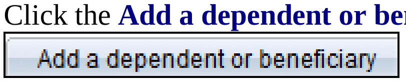
Step	Action
7.	Enter the desired information into the **Date of Birth** field.

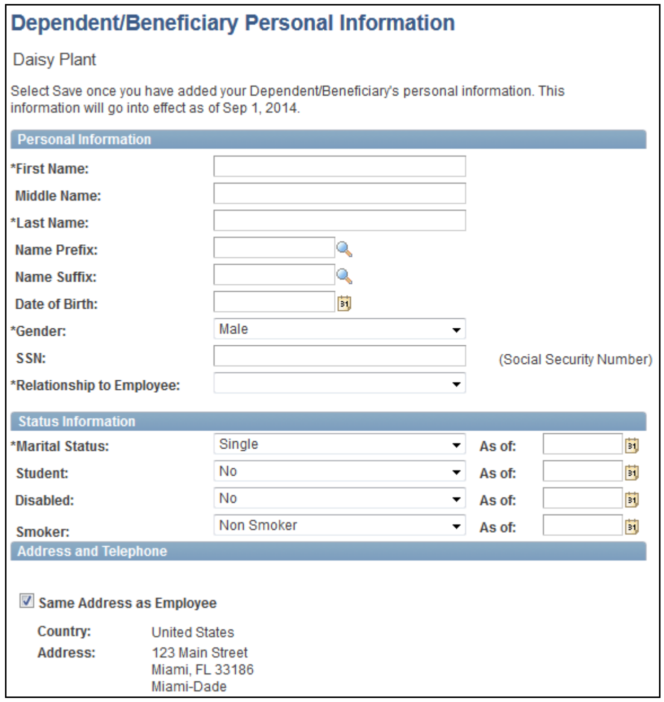
Step	Action
8.	Click the **Submit** button. 



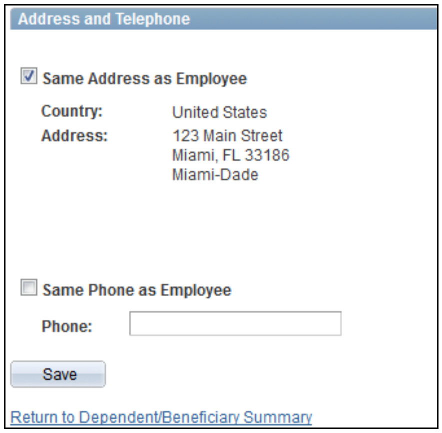
Step	Action
9.	Click the **Yes, I want to enter information about my new dependent(s) now** link.



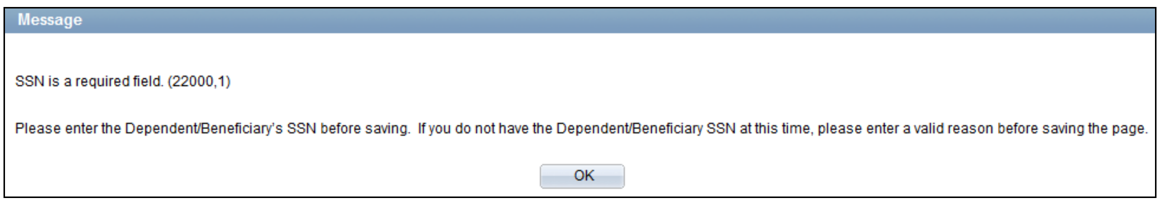
Step	Action
10.	Click the **Add a dependent or beneficiary** button. 

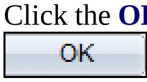


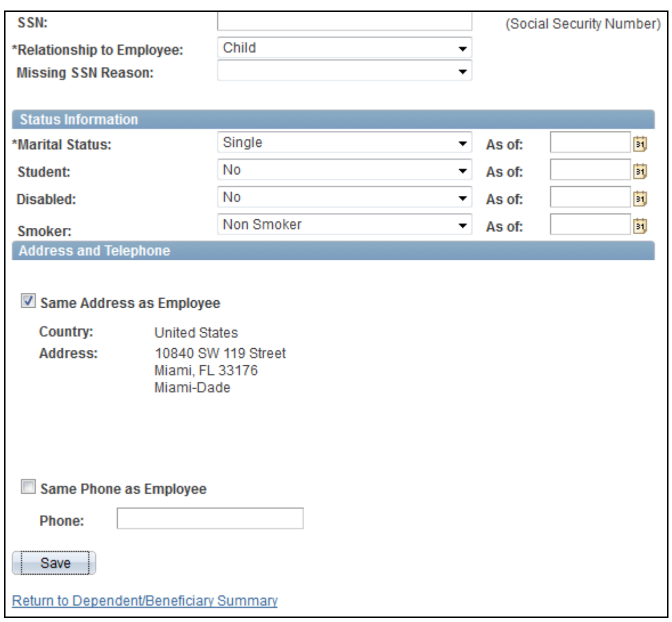
Step	Action
11.	Enter the desired information into the **First Name** field.
12.	Enter the desired information into the **Last Name** field.
13.	Enter the desired information into the Date of Birth field.
14.	Click the button to the right of the **Gender** field. 
15.	Click the appropriate **Gender** 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.



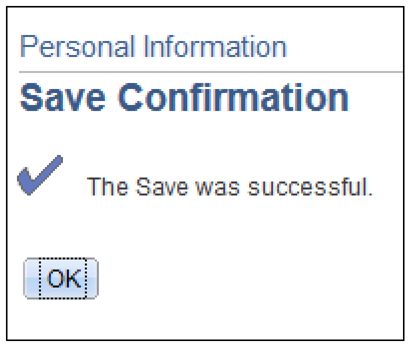
Step	Action
20.	Click the **Save** button. 



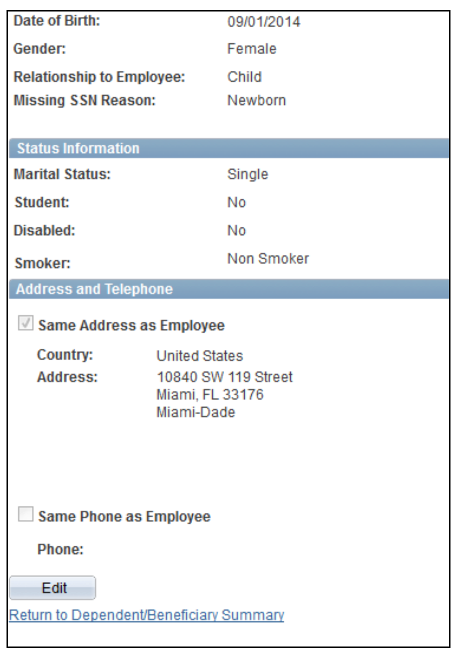
Step	Action
21.	Click the **OK** button. 



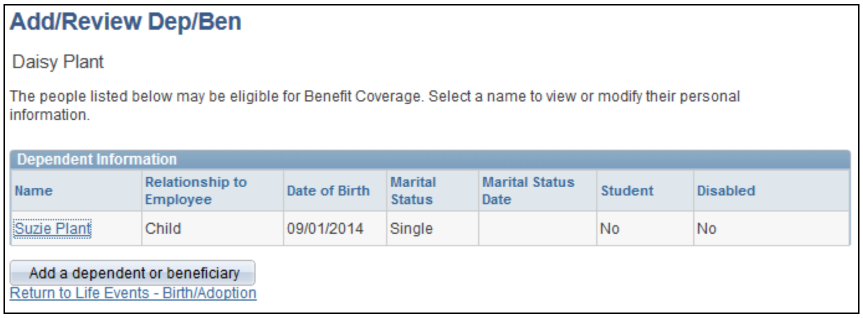
Step	Action
22.	Click the button to the right of the **Missing SSN Reason** field.
23.	Click the **Newborn** list item. Newborn
24.	Click the **Save** button. The child is entered as a dependent and beneficiary. Save



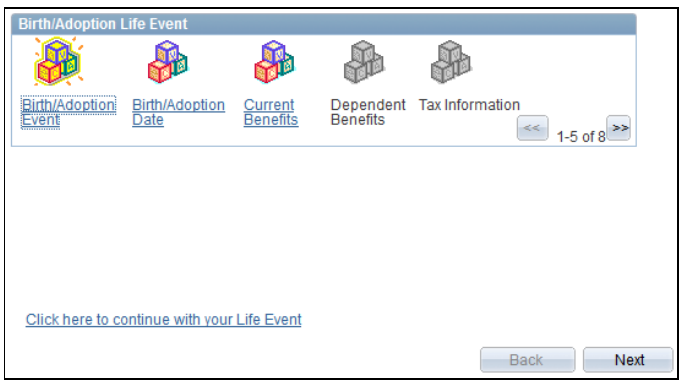
Step	Action
25.	Click the **OK** button. OK



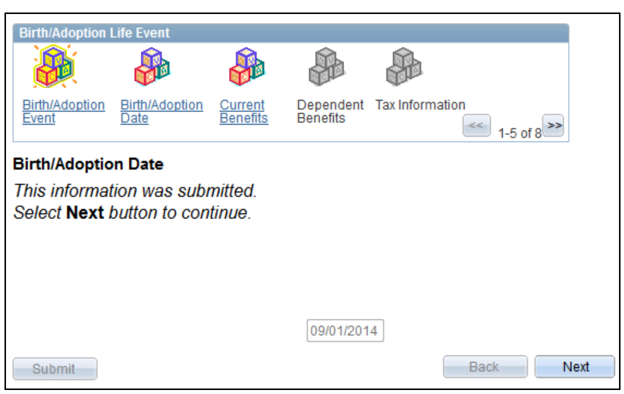
Step	Action
26.	Click the **Return to Dependent/Beneficiary Summary** link. Return to Dependent/Beneficiary Summary



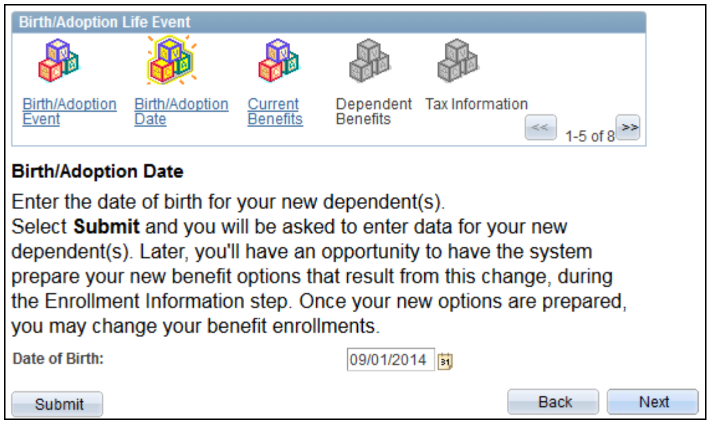
Step	Action
27.	Click the **Return to Life Events - Birth/Adoption** link. Return to Life Events - Birth/Adoption



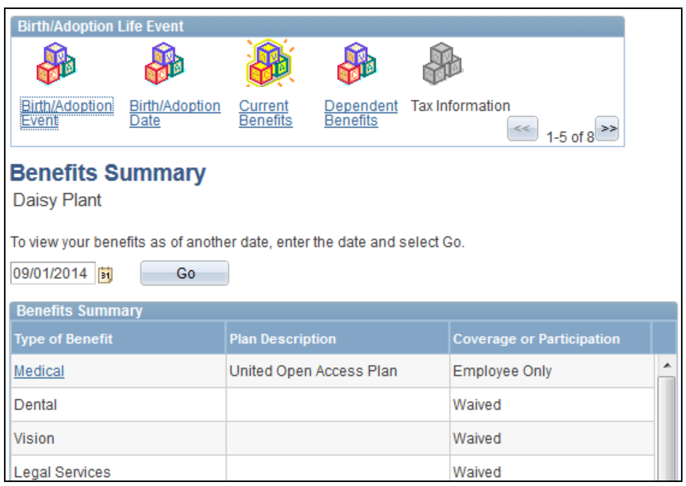
Step	Action
28.	Click the **Click here to continue with your Life Event** link. Click here to continue with your Life Event



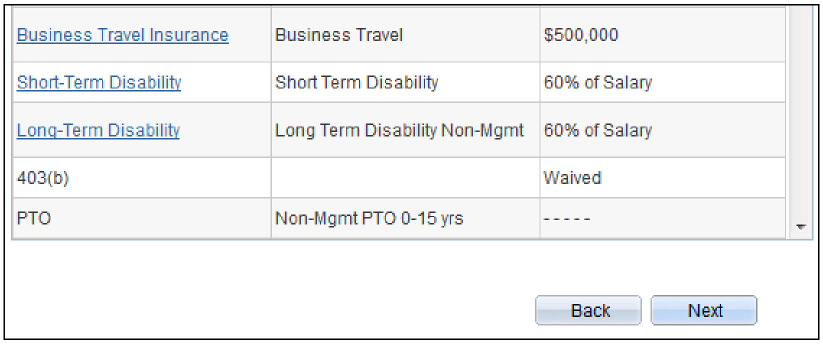
Step	Action
29.	Click the **Next** button. Next



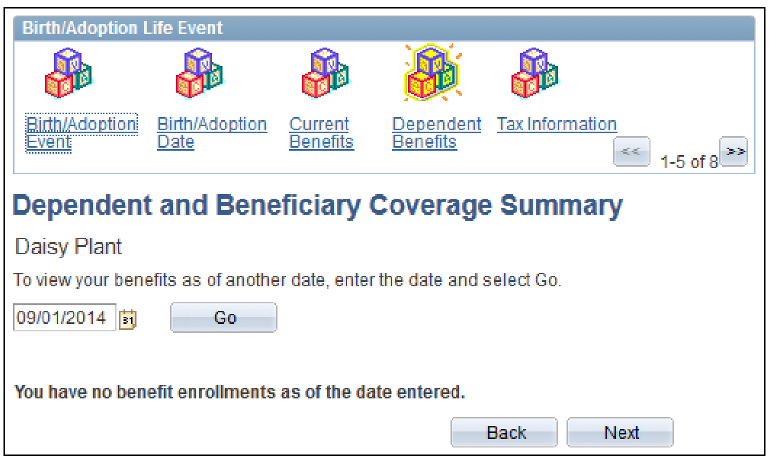
Step	Action
30.	Click the **Next** button. Next



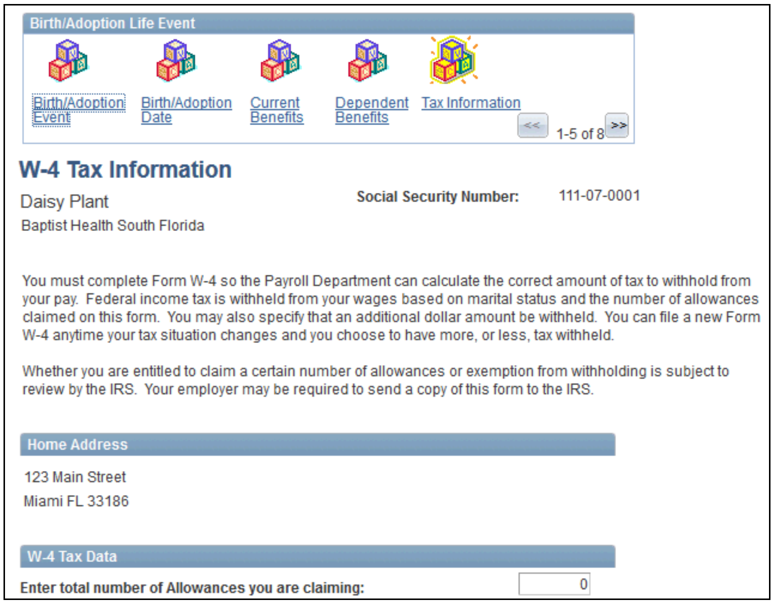
Step	Action
31.	Use the Benefits Summary page to review your current benefit coverage.
32.	Scroll down the page.



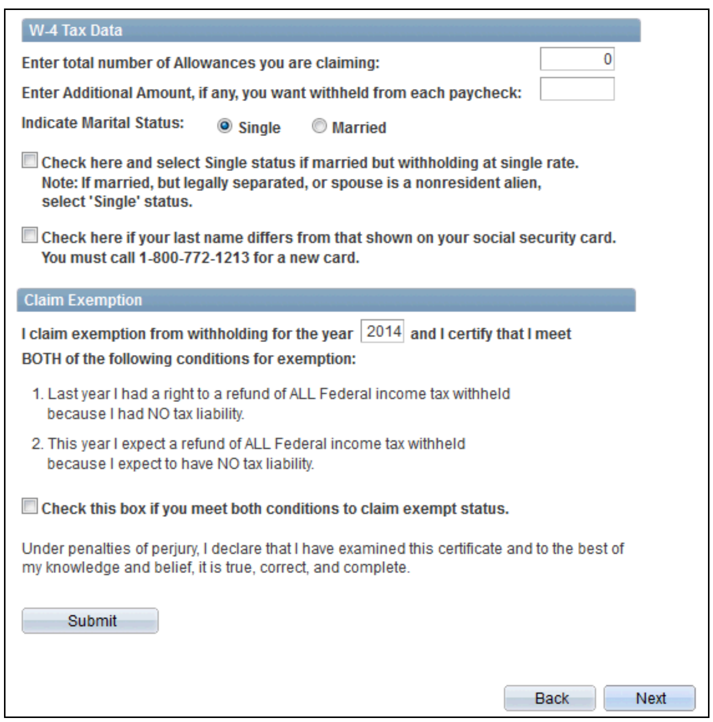
Step	Action
33.	Click the **Next** button. Next



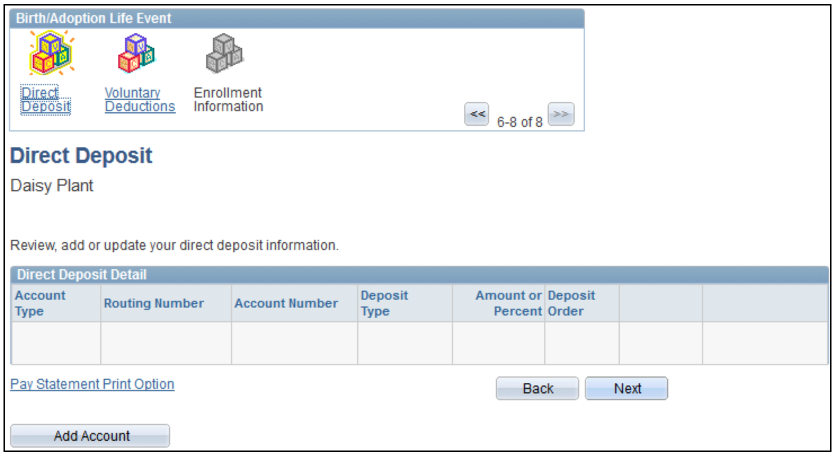
Step	Action
34.	Use the Dependent and Beneficiary Coverage Summary page to view a summary of your current dependent and beneficiary coverage. Currently, this employee does not have any dependent benefit enrollments.
35.	Click the **Next** button. Next

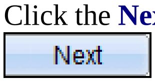


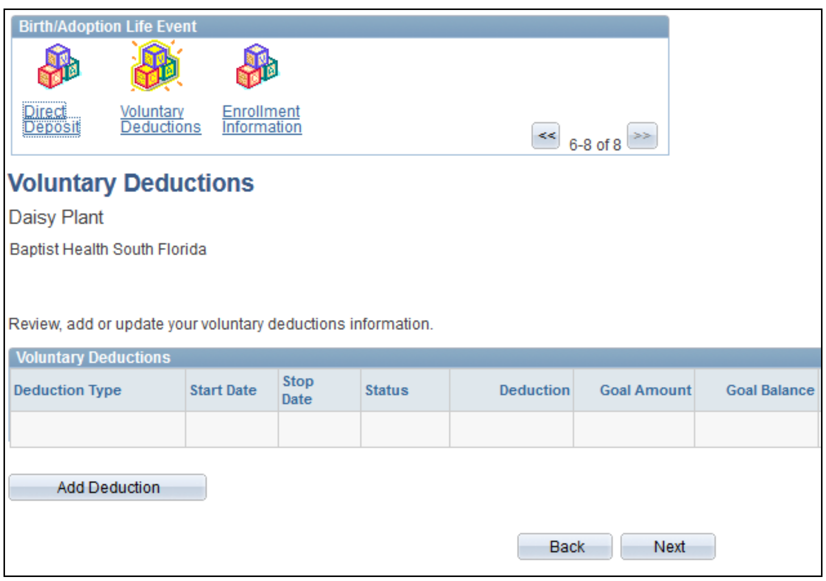
Step	Action
36.	Use the W-4 Tax Information page to review and edit your W-4 Tax Data including marital status, number of allowances, and any additional money to be withheld.
37.	Scroll down the page.



Step	Action
38.	Click the **Next** button. 

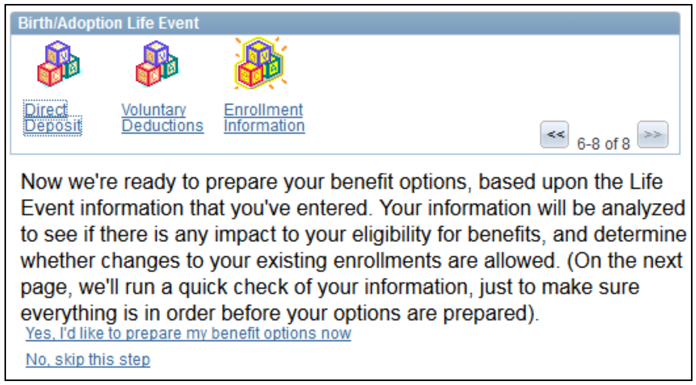


Step	Action
39.	Use the Direct Deposit page to review, add, or update your direct deposit information.
40.	Click the **Next** button. 

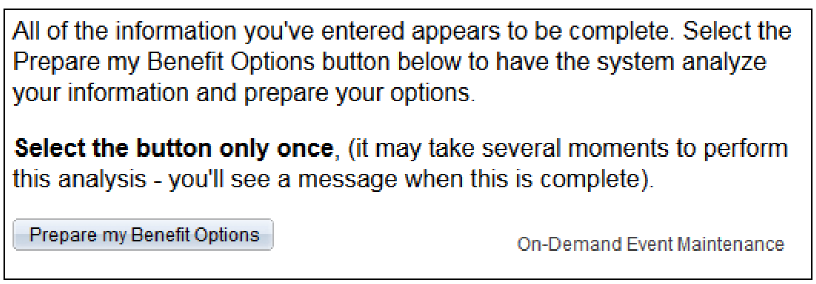


Step	Action
41.	Use the Voluntary Deductions page to review, add, or update your voluntary deductions.

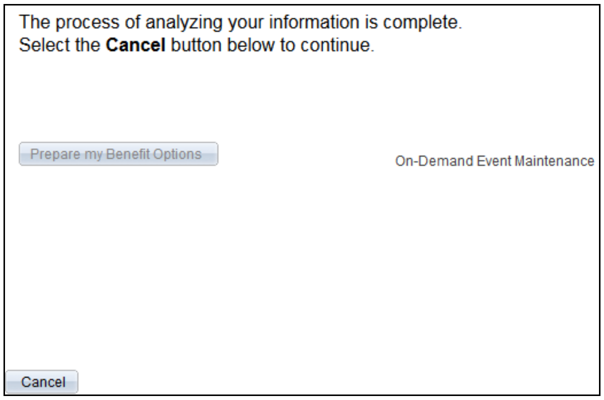
42.	Click the **Next** button. Next



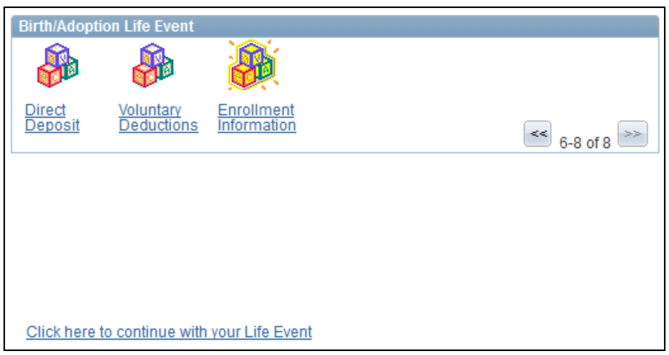
Step	Action
43.	Upon creating and completing the steps of the Birth/Adoption Life event, your benefit options a ready to be prepared. You can either have your benefits prepared now or you can return to this step later.
44.	Click the **Yes, I'd like to prepare my benefit options now** link. Yes, I'd like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



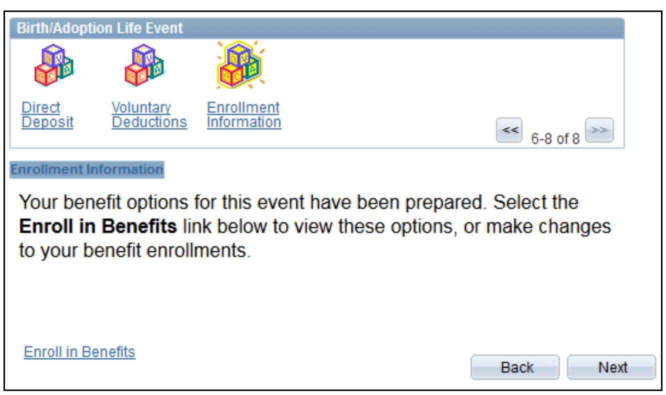
Step	Action
45.	Click the **Prepare my Benefit Options** button. Prepare my Benefit Options



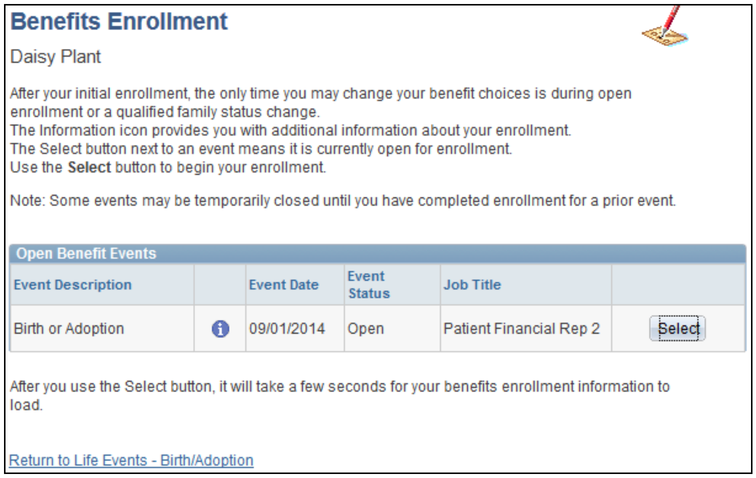
Step	Action
46.	Click the **Cancel** button. 



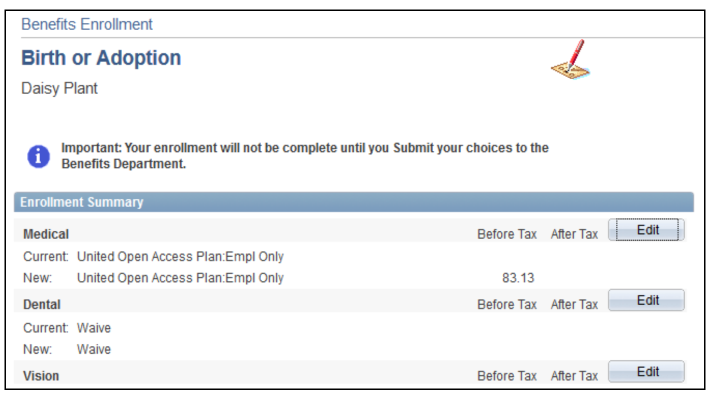
Step	Action
47.	Click the **Click here to continue with your Life Event** link. 



Step	Action
48.	Click the **Enroll in Benefits** link. Enroll in Benefits

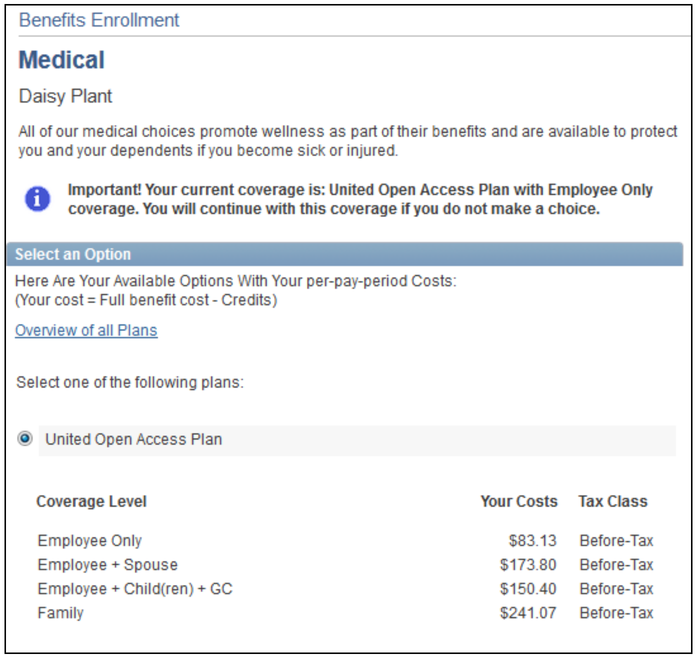


Step	Action
49.	Based on your life event and the information you entered, your benefits are open for enrollment.
50.	Click the **Select** button. Select

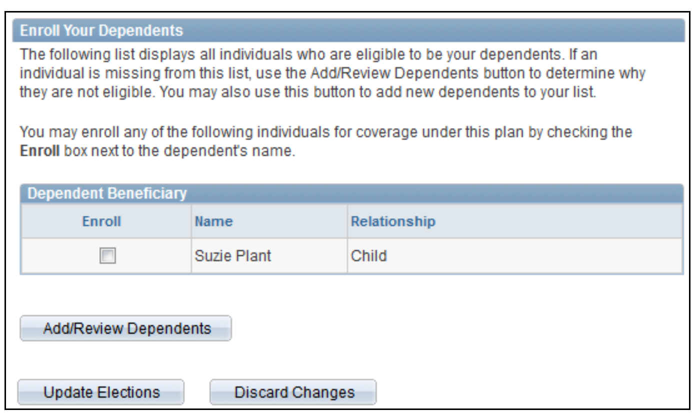


Step	Action
51.	Use the Enrollment Summary table to view your current coverage and elect new coverage. To elect benefits, click the Edit button to the right of the appropriate benefit. In this example, you will elect coverage for several benefits. In this example, you will edit your medical elections.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

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

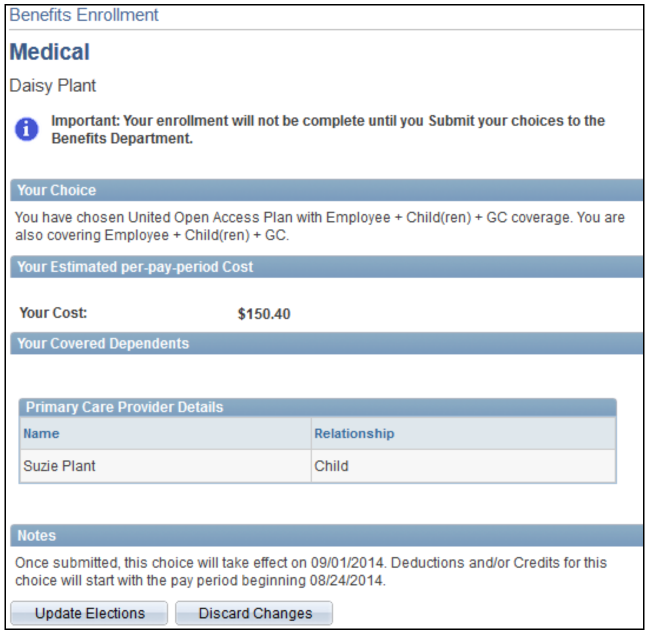


Step	Action
53.	For each benefit you wish to enroll in, there is a note reminding you of your current coverage. Until you submit your enrollment information, your coverage will not change.
54.	Scroll down the page.

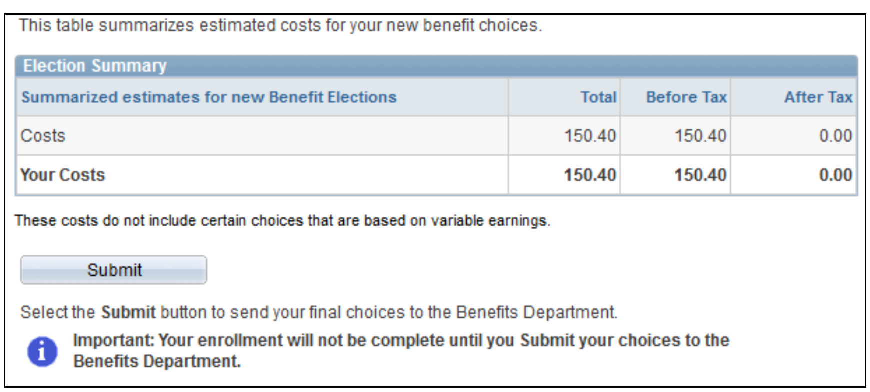


Step	Action
55.	Next, enroll those individuals you would like covered under the selected medical plan.

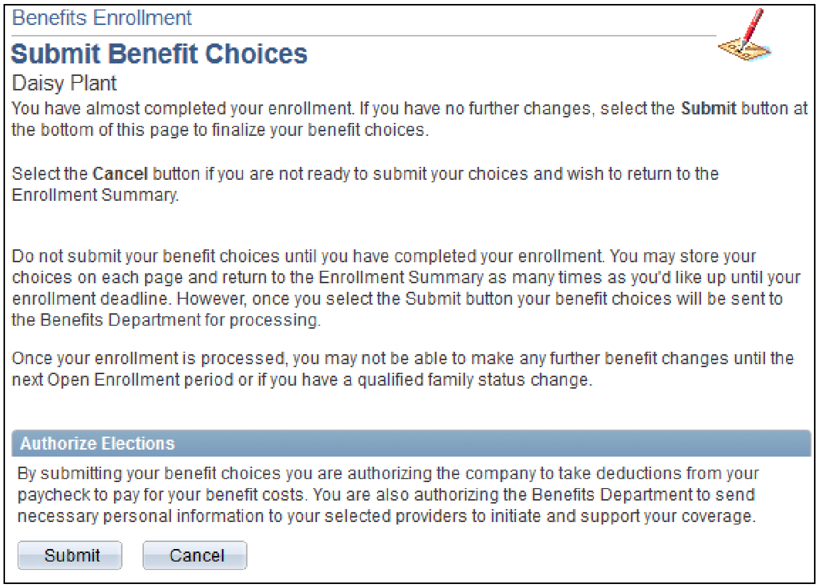
Step	Action
56.	Click the **Enroll** radio button to the left of the appropriate dependent to enroll them for medical coverage under the selected plan.
57.	Click the **Update Elections** button. Update Elections

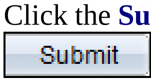


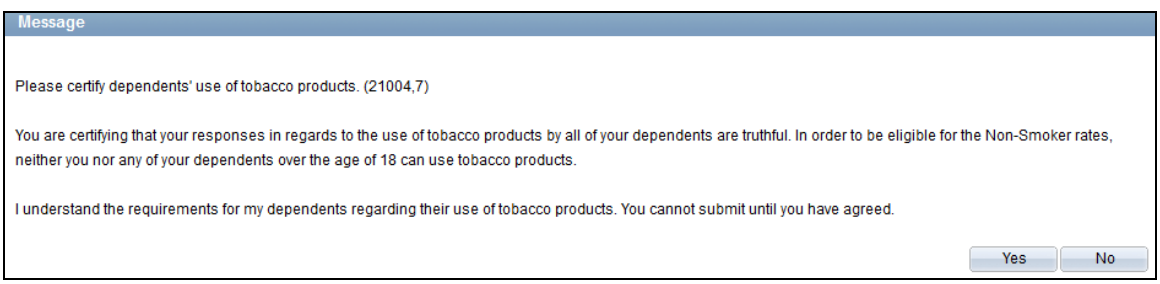
Step	Action
58.	Review your selection, including the cost and covered dependents. Click Discard Changes to return and change your choices. Click Update Elections to save your choices.
59.	Click the **Update Elections** button. Update Elections

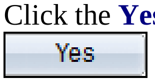


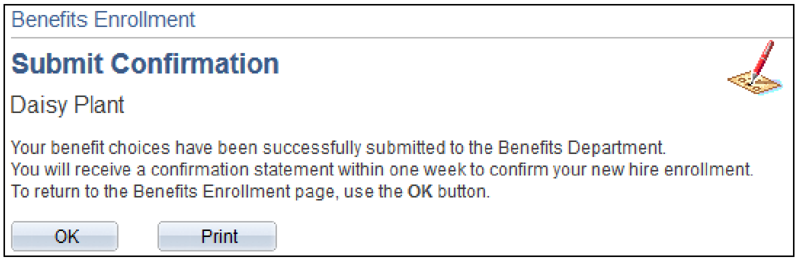
Step	Action
60.	Before submitting, be sure to review the Election Summary table. This table contains the summarized estimated costs for your new elections.
61.	Click the **Submit** button. 



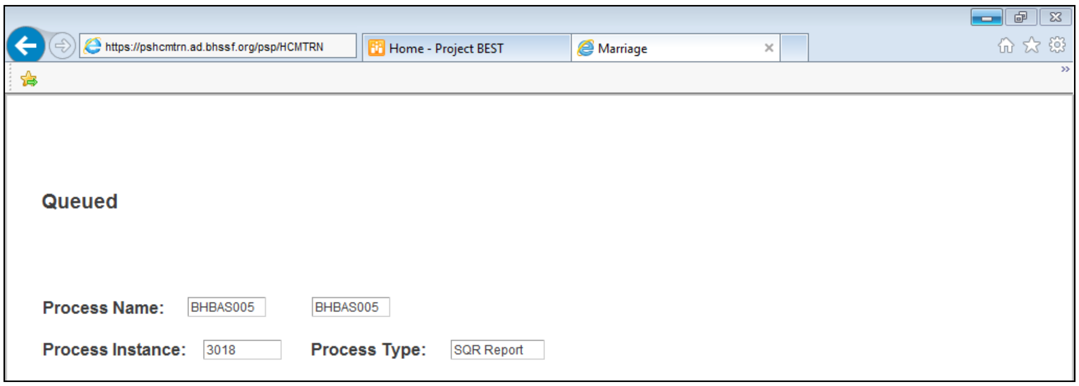
Step	Action
62.	Before submitting your benefit choices, please read the information on this page.
63.	Click the **Submit** button to send your final choices to the Benefits Department. 



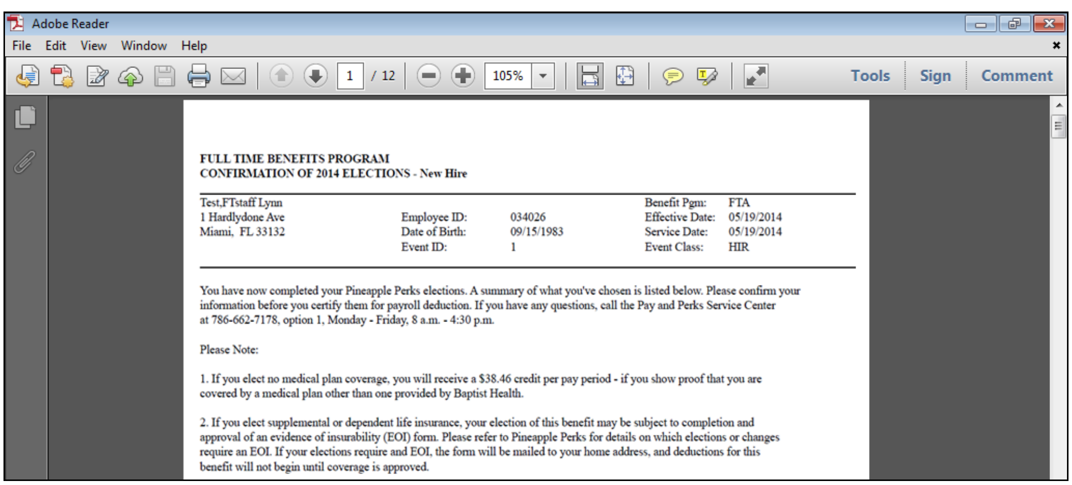
Step	Action
64.	Click the **Yes** button. 

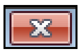


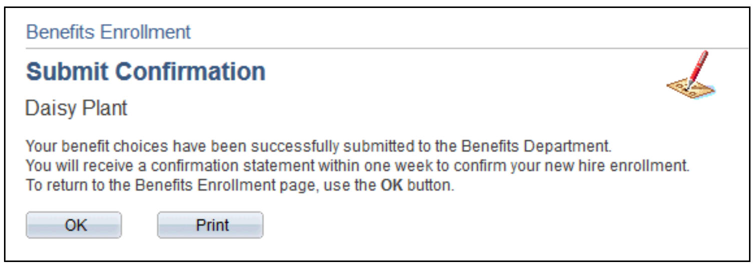
Step	Action
65.	Click the **Print** button. Print

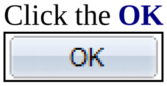


Step	Action
66.	A new window opens confirming that the process for printing your confirmation statement has been queued. Next, you will close the window and navigate to your confirmation page.
67.	Click the **Close** button.



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. 

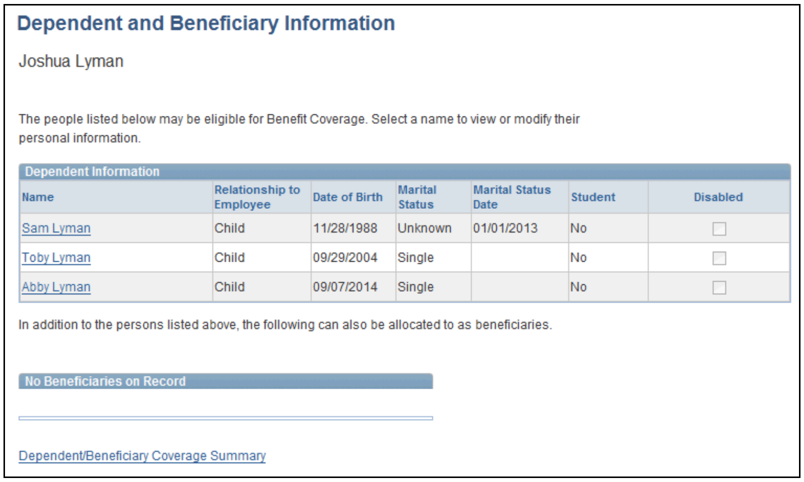


Step	Action
71.	Click the **OK** button. 
72.	Please note that you must provide the Benefits Department a copy of the Foot Print Certificate provided to you by the hospital to complete the enrollment of your dependent. In addition, a birth certificate and Social Security number is required to avoid your 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

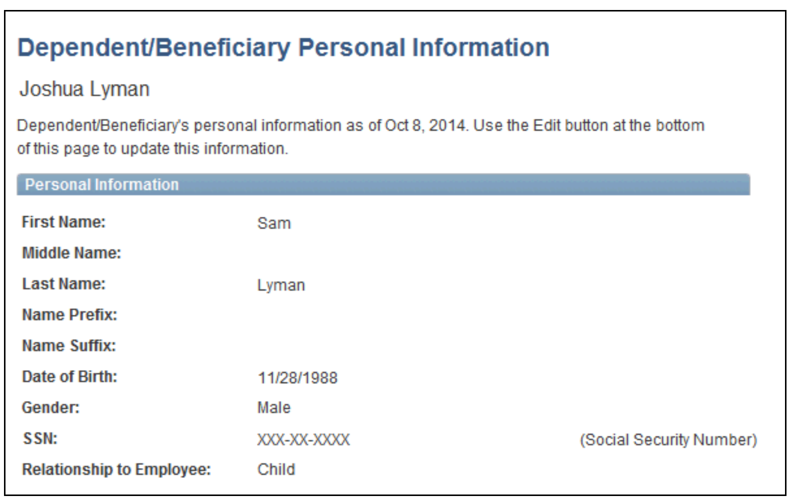
Name	Relationship to Employee	Date of Birth	Marital Status	Marital Status Date	Student	Disabled
Sam Lyman	Child	11/28/1988	Unknown	01/01/2013	No	☐
Toby Lyman	Child	09/29/2004	Single		No	☐
Abby Lyman	Child	09/07/2014	Single		No	☐

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

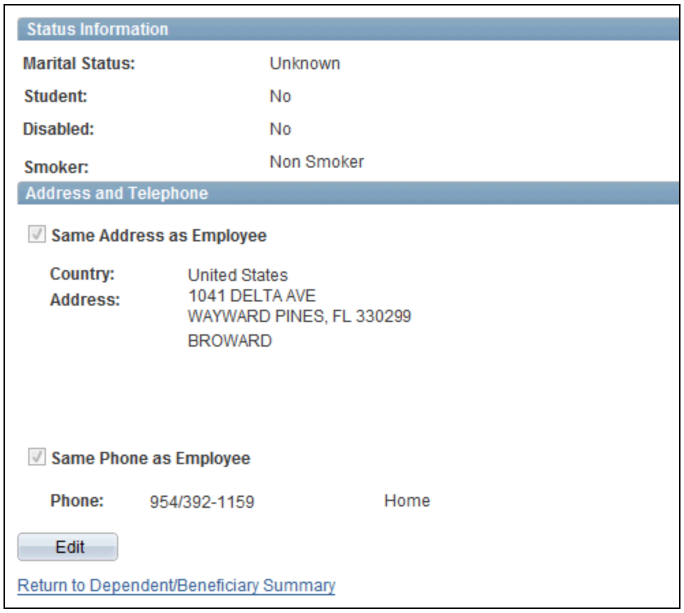
Joshua Lyman

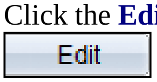
Dependent/Beneficiary's personal information as of Oct 8, 2014. Use the Edit button at the bottom of this page to update this information.

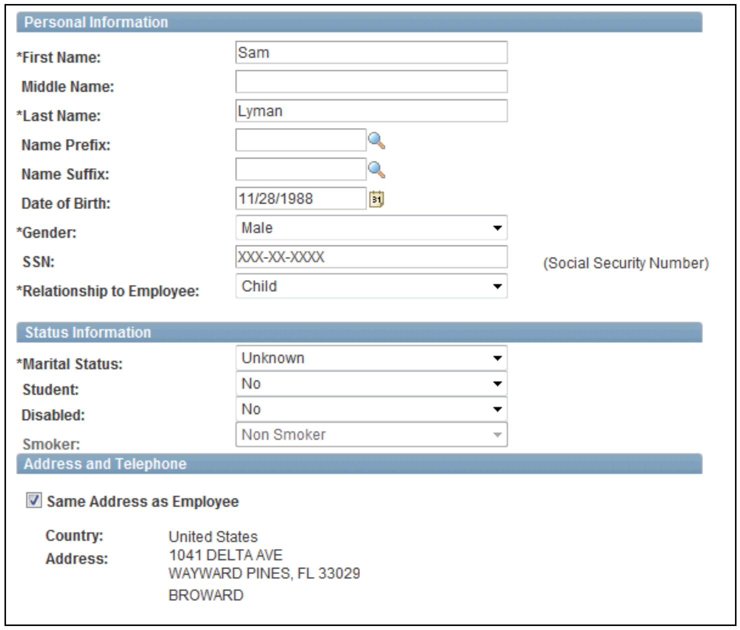
Personal Information

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	

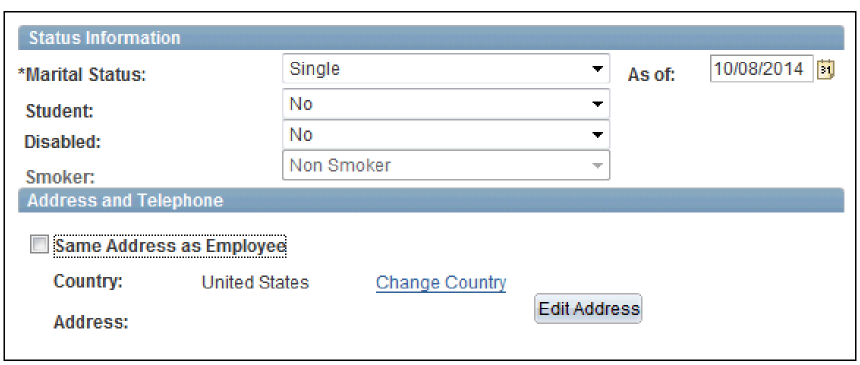
Step	Action
3.	Use the Dependent/Beneficiary Personal Information page to view and edit a dependent's personal information. Click the Edit button at the bottom of the page to edit the selected dependent's personal information.
4.	Scroll down the page.



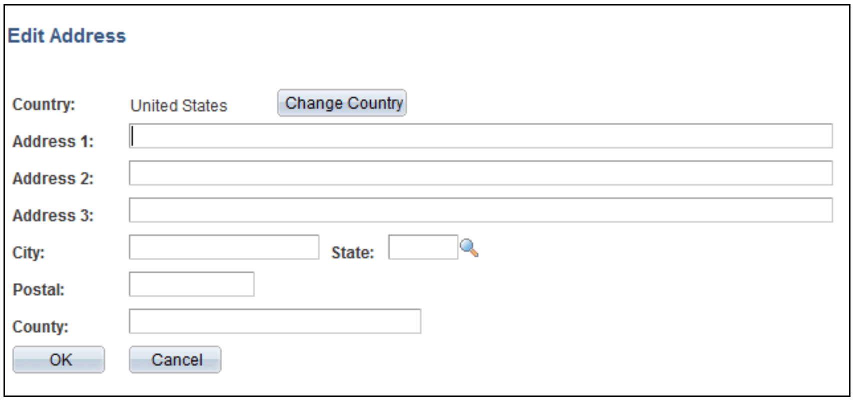
Step	Action
5.	In this example, you will update a dependent's marital status, address, and phone number. Click the **Edit** button. 

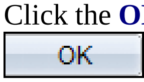


Step	Action
6.	Click the button to the right of the **Marital Status** field.
7.	Click the appropriate **Marital Status** list item.
8.	Deselect the **Same Address as Employee** option.

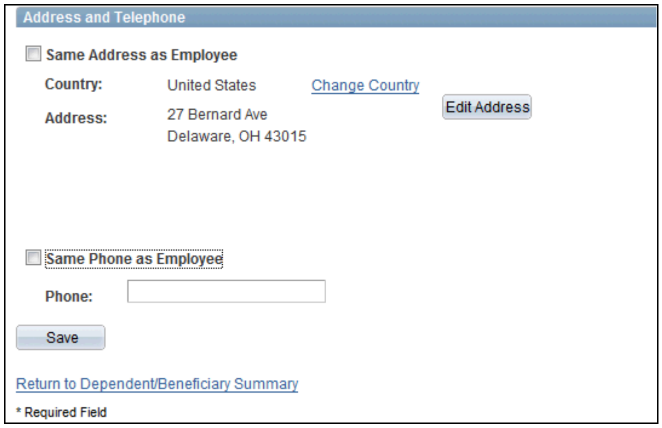


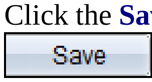
Step	Action
9.	Click the **Edit Address** button. Edit Address

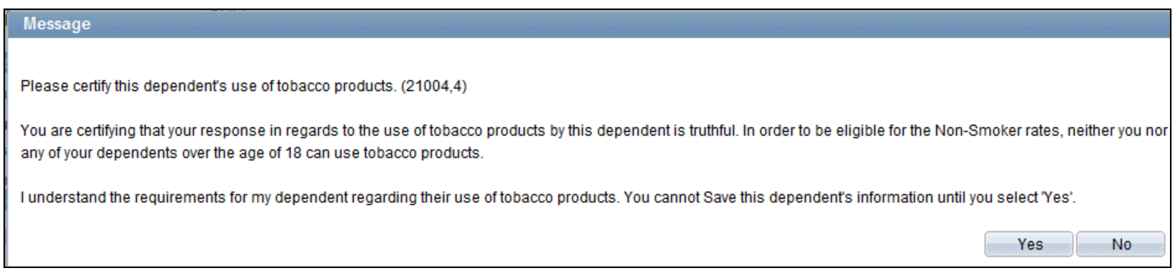


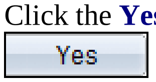
Step	Action
10.	Enter the desired information into the **Address 1** field.
11.	Enter the desired information into the **City** field.
12.	Enter the desired information into the **State** field.
13.	Enter the desired information into the **Postal** field.
14.	Click the **OK** button. 

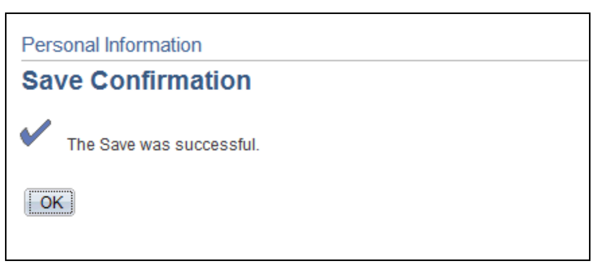
Step	Action
15.	Deselect the **Same Phone as Employee** option. 

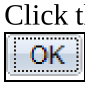


Step	Action
16.	Enter the desired information into the **Phone** field.
17.	Click the **Save** button. 



Step	Action
18.	Click the **Yes** button. 



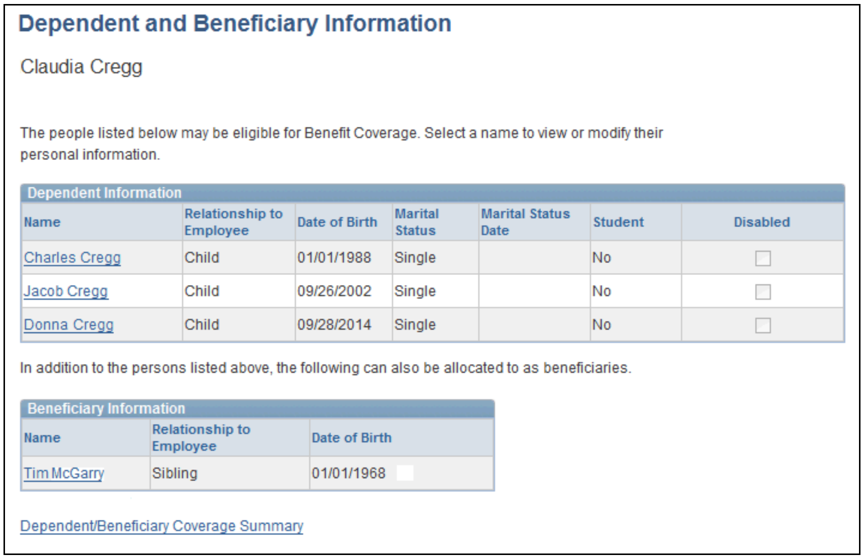
Step	Action
19.	Click the **OK** button. 

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.**

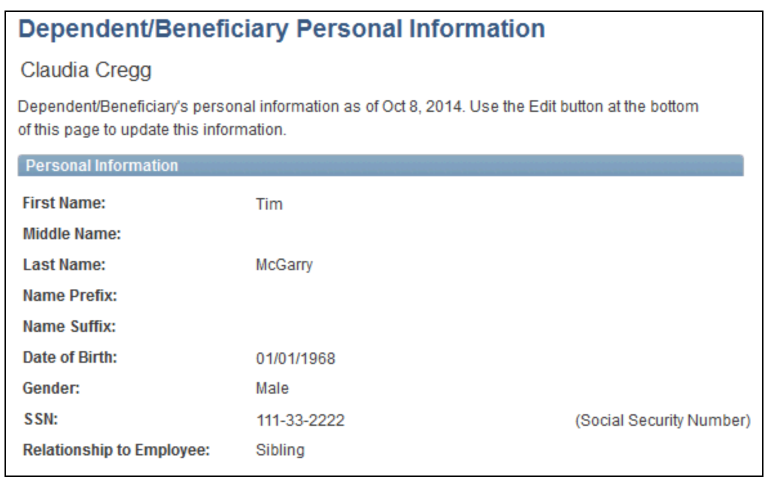
Updating Beneficiary Information

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

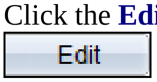
Purpose: Use this transaction to practice updating beneficiary information.

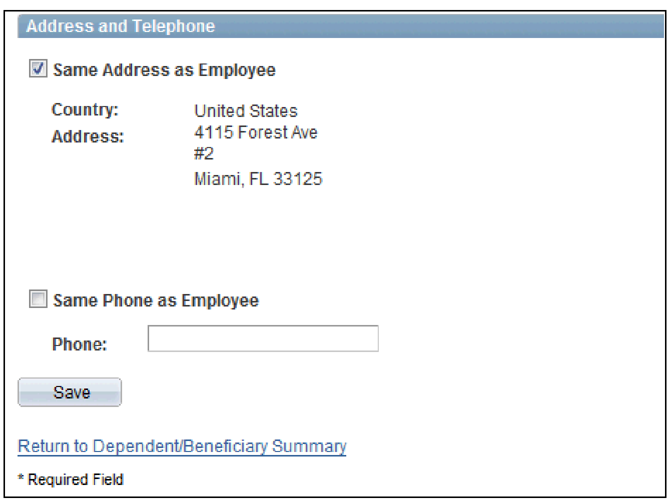


Step	Action
1.	Use the Dependent and Beneficiary Information page to view those eligible for benefit coverage. Click a name to view or modify their personal information.
2.	Click the appropriate **Beneficiary Name** link.

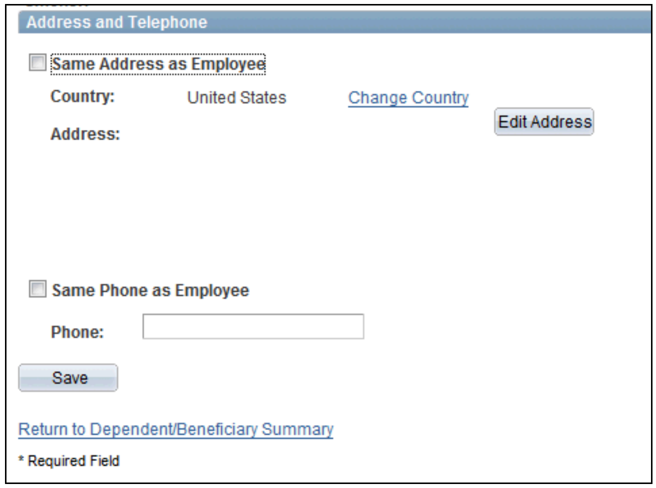


Step	Action
3.	Use the Dependent/Beneficiary Personal Information page to view and edit a beneficiary's personal information. Click the Edit button at the bottom of the page to edit the selected beneficiary's personal information.
4.	Scroll down the page.

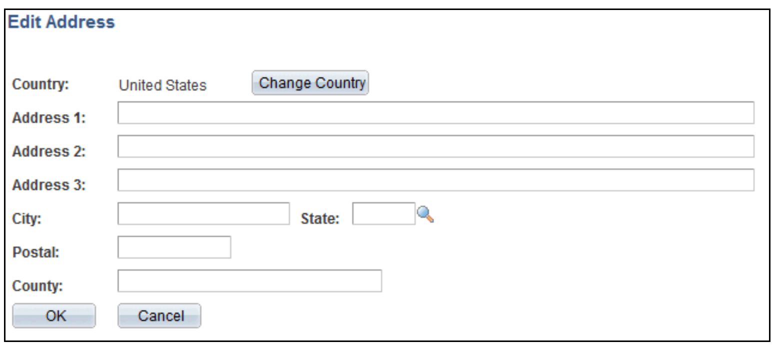
Step	Action
5.	In this example, you will update the beneficiary's address and phone number. Click the **Edit** button. 

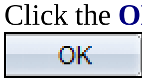


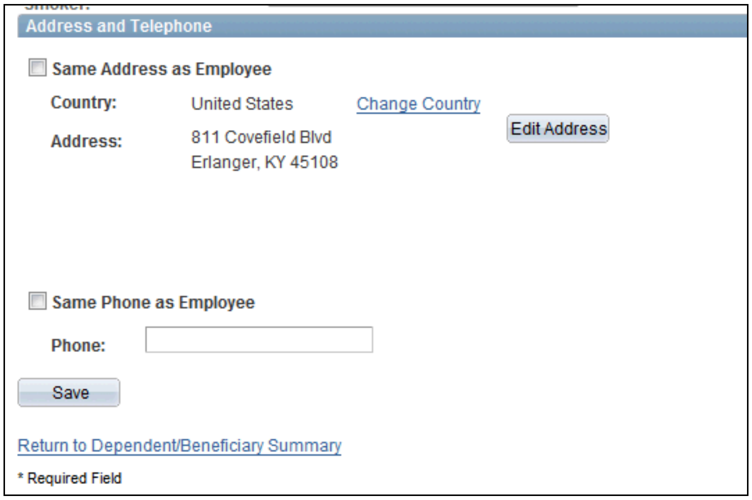
Step	Action
6.	Deselect the **Same Address as Employee** option. 



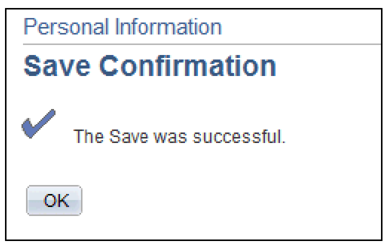
Step	Action
7.	Click the **Edit Address** button. 



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. 



Step	Action
13.	Enter the desired information into the **Phone** field.
14.	Click the **Save** button. 



Step	Action
15.	Click the **OK** button. 

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

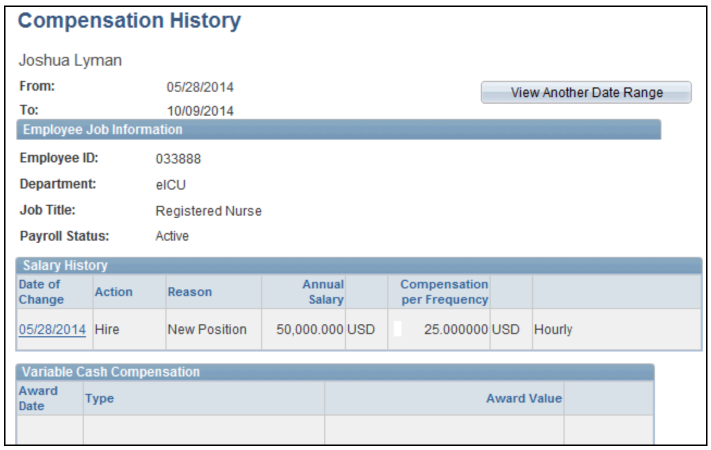
Managing Payroll Information

Viewing Compensation Information

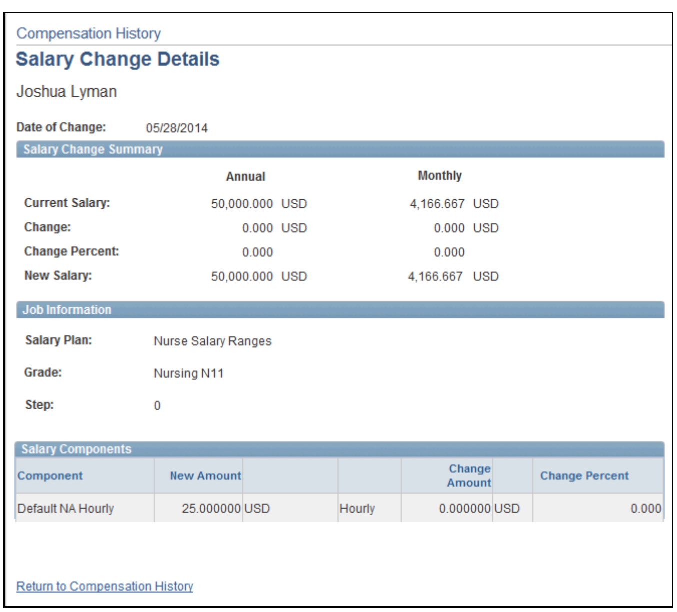
Procedure

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

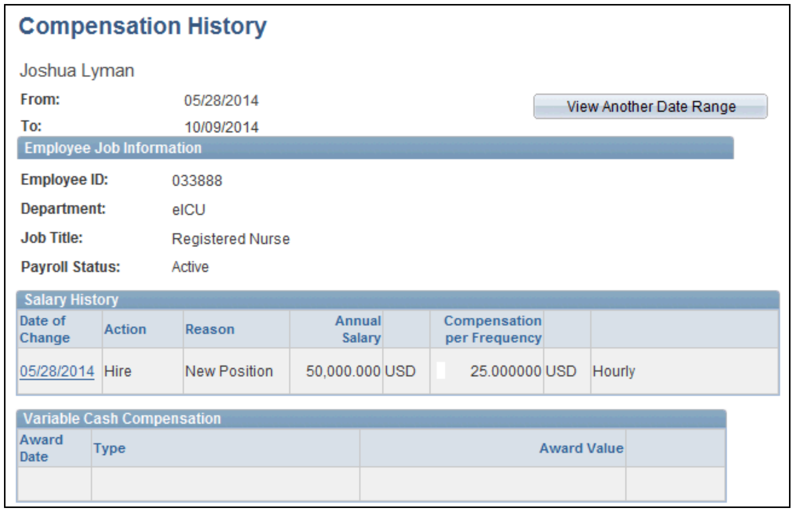
Purpose: Use this transaction to practice viewing your compensation information.



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.



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

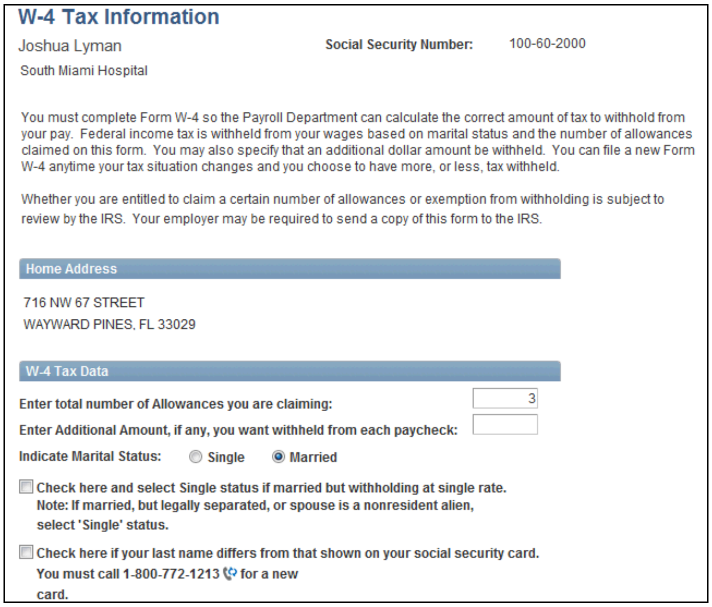


Step	Action
5.	You can also view your variable compensation details on this page. In this example, this employee does not have variable compensation options.
6.	**Congratulations.** You have viewed your compensation information. **End of Procedure.**

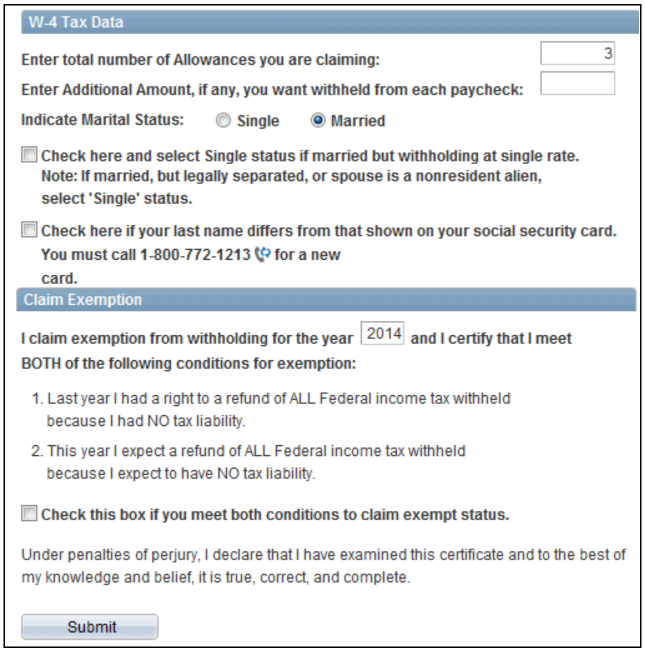
Updating Compensation Information - Tax Data

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

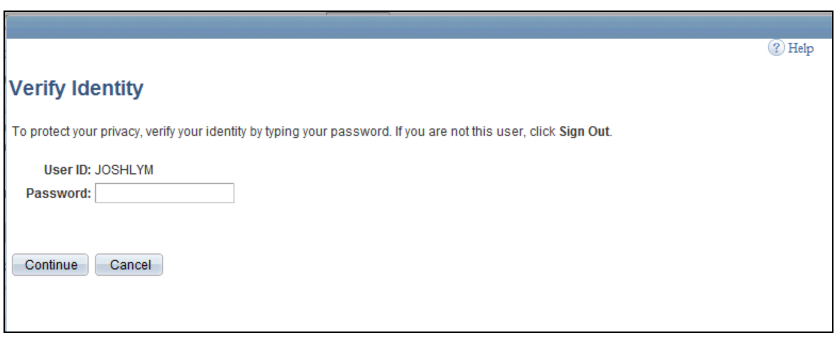
Purpose: Use this transaction to practice updating your compensation information. In this example, you will update your tax data information.



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.

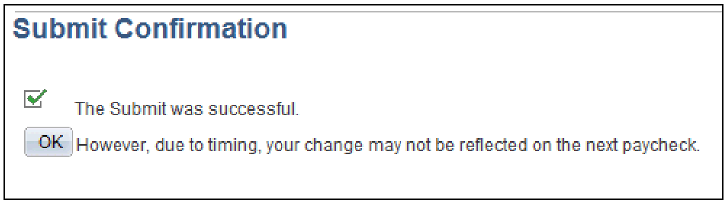


Step	Action
4.	You can also claim exemption if you meet both conditions outlined here. In this example, this employee meets the conditions for exemption.
5.	Click the **Check this box if you meet both conditions to claim exempt status.** option.
6.	Click the **Submit** button. Submit

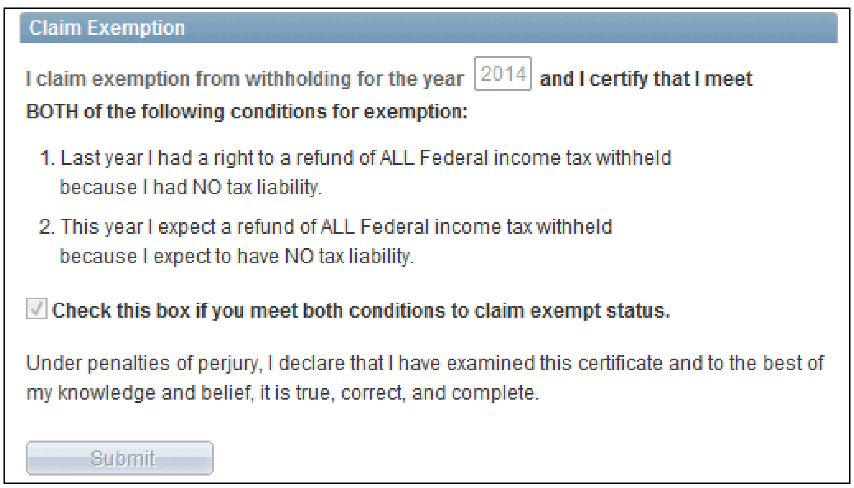


Step	Action
7.	To protect your information, the system requires you to enter your password in order to submit changes.

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



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. 

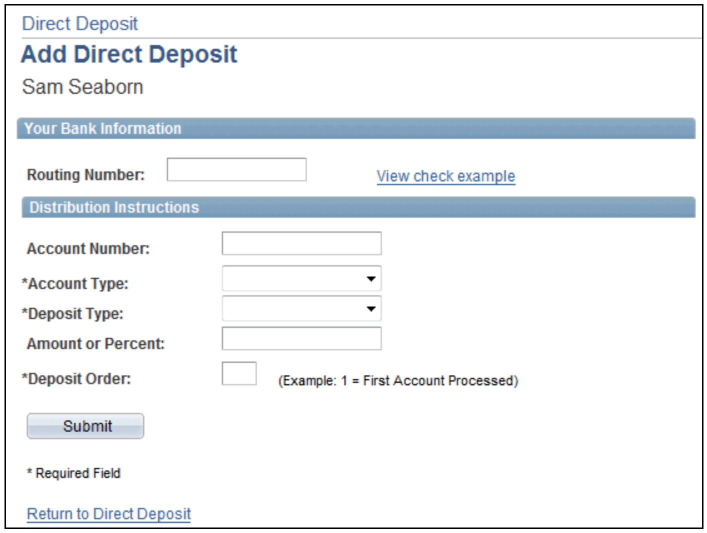


Step	Action
11.	Notice, you can no longer update the Claim Exemption section.
12.	**Congratulations.** You have updated your tax data information. **End of Procedure.**

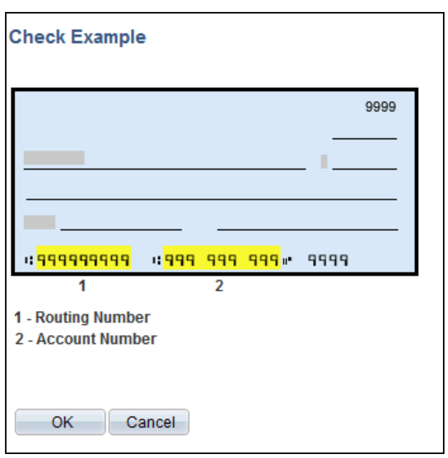
Entering Compensation Information - Direct Deposit

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

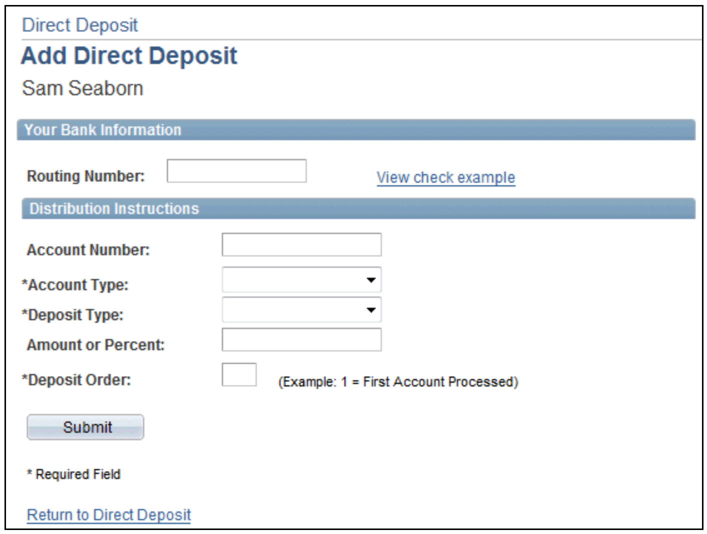
Purpose: Use this transaction to practice entering compensation information. In this example, you will enter bank information so you may receive your pay through direct deposit.



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

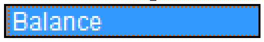


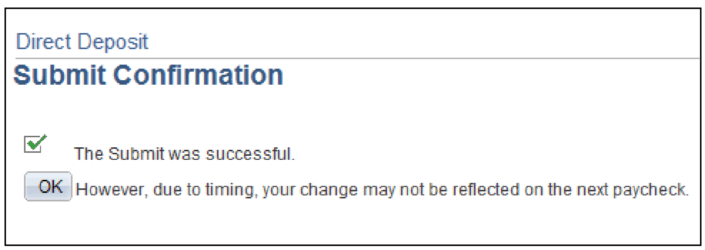
Step	Action
4.	Use this page example to find the appropriate numbers on your check. The number on the bottom left of the check is your routing number. The number on the bottom middle of the check is your account number.
5.	Click the **OK** button. 



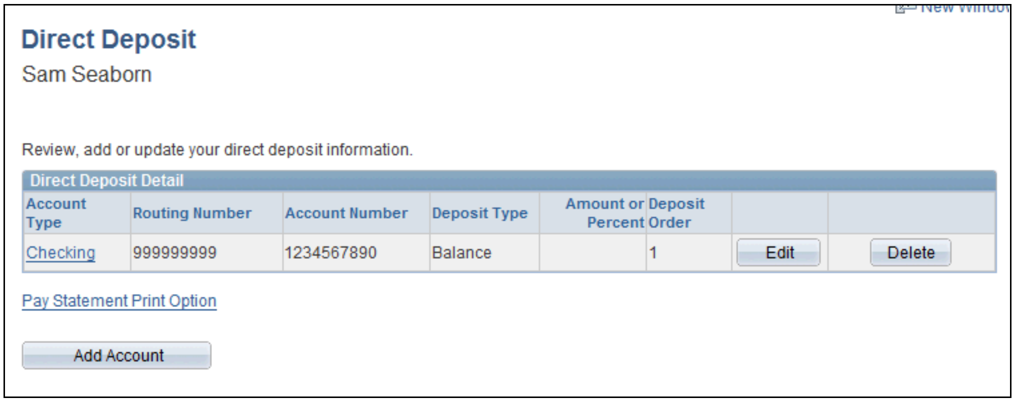
Step	Action
6.	Enter the desired information into the **Routing Number** field.
7.	Enter the desired information into the **Account Number** field.
8.	Click the button to the right of the **Account Type** field. 
9.	Click the appropriate **Account Type** list item.
10.	Click the button to the right of the **Deposit Type** field. 

Step	Action
11.	There are three deposit types: amount, balance, and percent. Select Balance to have the balance of your pay deposited to this account. 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. 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.

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. 

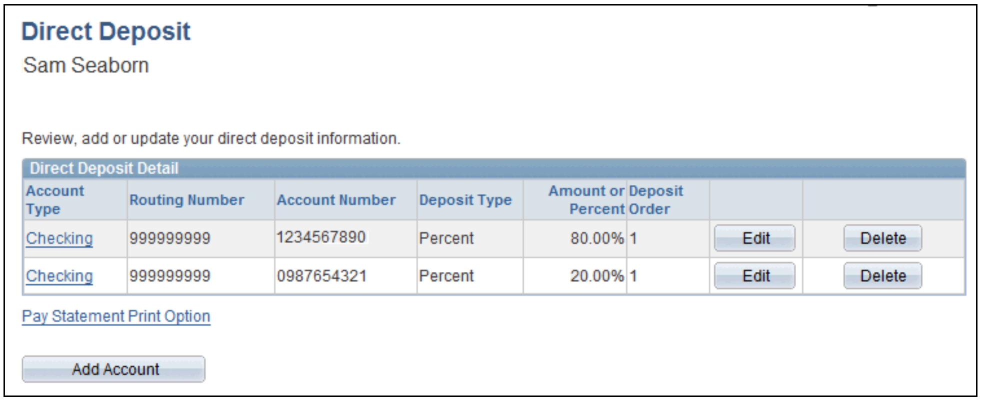


Step	Action
18.	Once you have saved your bank information, you are routed back to the Direct Deposit page. Use this page to edit an existing account, delete an account, or add an account.
19.	**Congratulations.** You have entered your direct deposit information. **End of Procedure.**

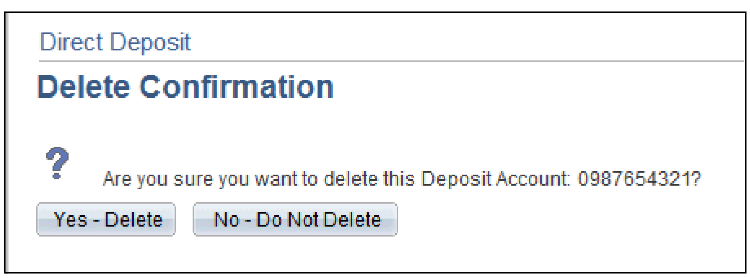
Updating Compensation Information - Direct Deposit

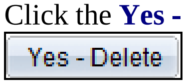
Navigation: Main Menu > HCM > Self Service > Payroll and Compensation > Direct Deposit

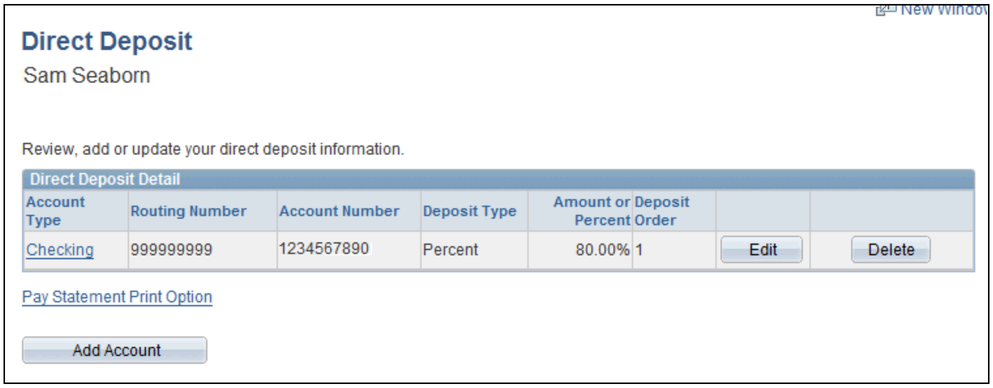
Purpose: Use this transaction to practice updating compensation information. In this example, you will update direct deposit information.



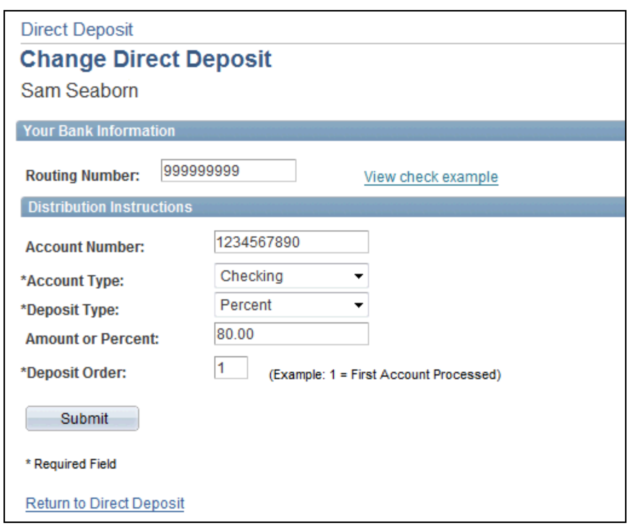
Step	Action
1.	Use the Direct Deposit page to review, add, or update your direct deposit information. In this example, you are deleting an account and changing the deposit type on the remaining account.
2.	Click the **Delete** button to the right of the appropriate account. 



Step	Action
3.	Click the **Yes - Delete** button. 

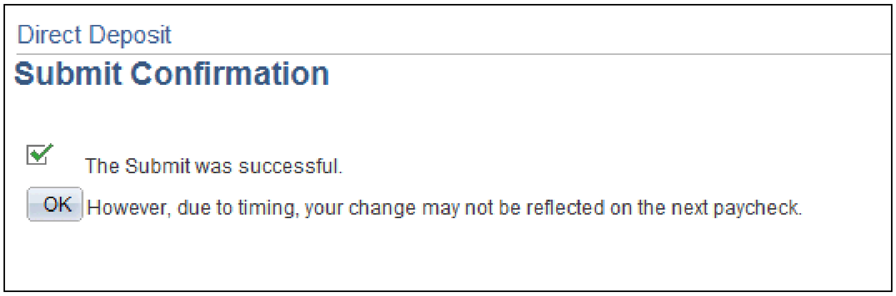


Step	Action
4.	Now that you have deleted an account, you need to either add another account or change the remaining account. Employees need to ensure all their pay is set for direct deposit. In this example, because the remaining account is set to deposit 80%, the remaining 20% of this person's pay is not set for direct deposit.
5.	In this example, you will edit the deposit type on the remaining account. Click the **Edit** button. Edit

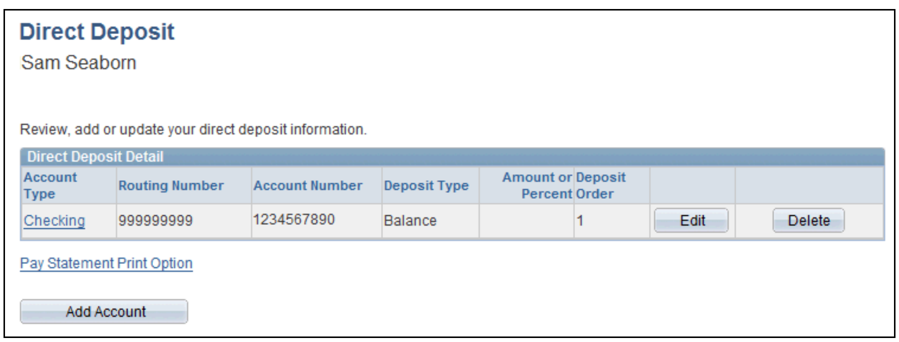


Step	Action
6.	Click the button to the right of the **Deposit Type** field.

Step	Action
7.	Click the **Balance** list item. Balance
8.	Enter the desired information into the **Deposit Order: Required** field.
9.	Click the **Submit** button. Submit



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. OK

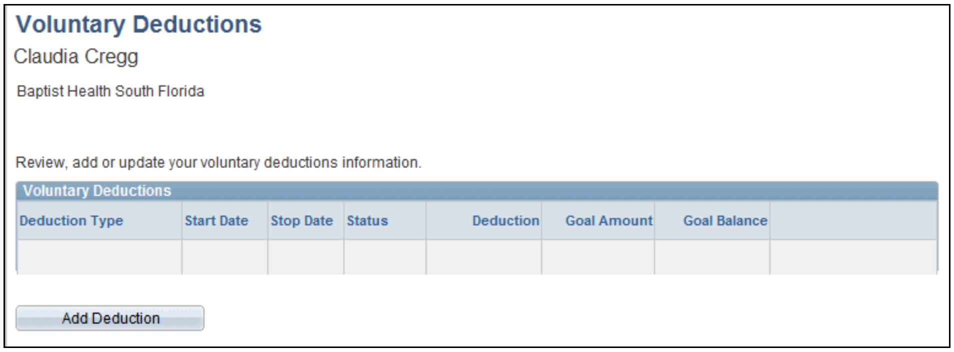


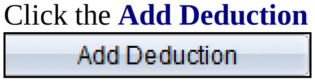
Step	Action
11.	Once you have saved, you are returned to the Direct Deposit page. Notice the deposit type has been changed to Balance.
12.	**Congratulations.** You have updated your direct deposit information. **End of Procedure.**

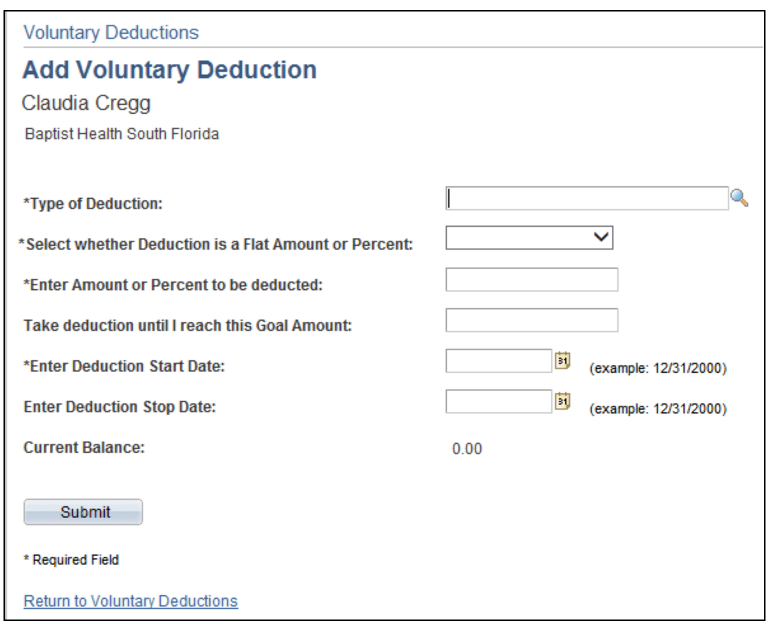
Updating Compensation Information - Voluntary Deductions

Navigation: Main Menu > HCM > Self Service > Payroll and Compensation > Voluntary Deductions

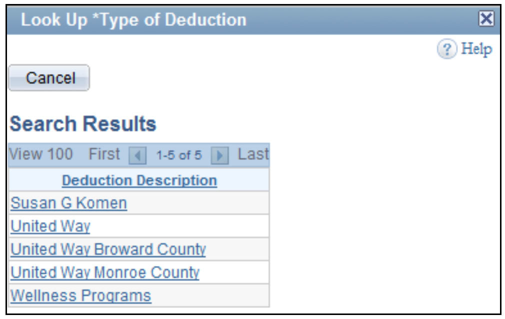
Purpose: Use this transaction to practice entering voluntary deductions.



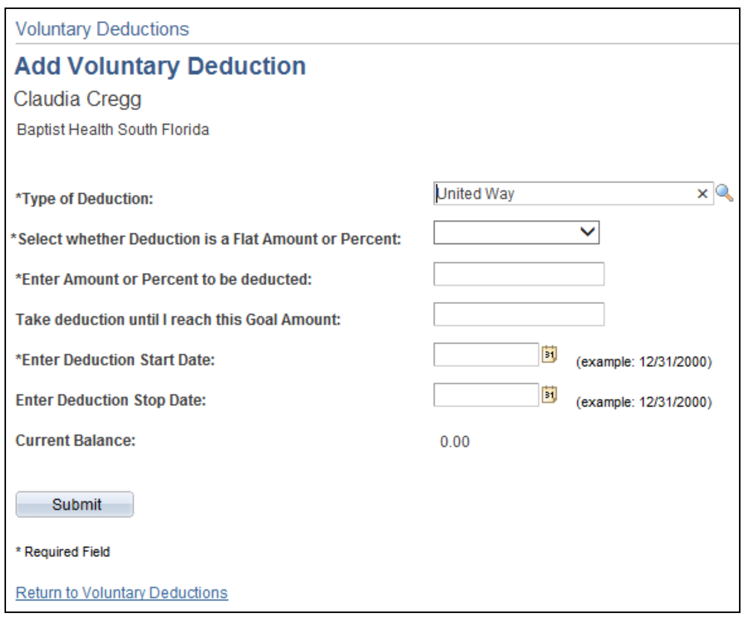
Step	Action
1.	Use the Voluntary Deductions page to review, add, or update your voluntary deduction information. In this example, you will add a deduction to help support United Way.
2.	Click the **Add Deduction** button. 



Step	Action
3.	Click the **Look up Type of Deduction (Alt+5)** button.

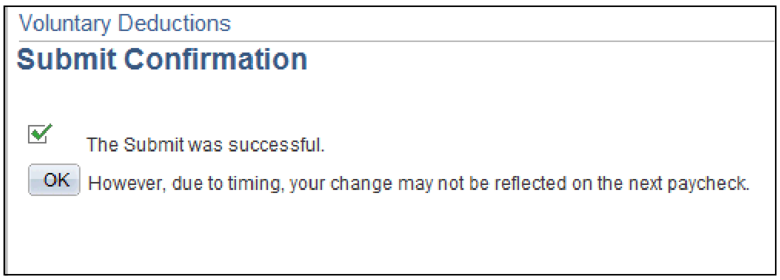


Step	Action
4.	Click the appropriate **Deduction Description** link.

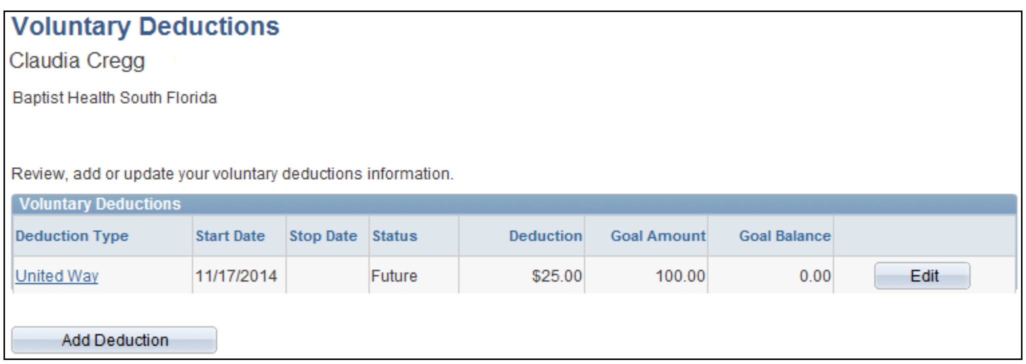


Step	Action
5.	Click the button to the right of the **Select whether Deduction is a Flat Amount or Percent** field.
6.	Click the appropriate **Amount** list item. You can select to have a percent of your total gross or a flat amount deducted. In this example, select Amount. Amount

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. 

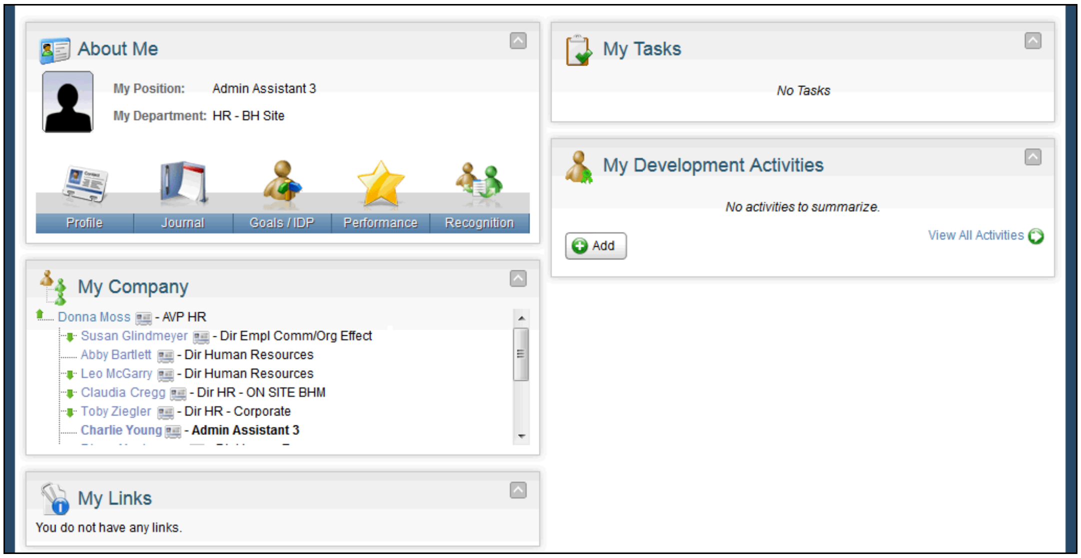


Step	Action
13.	Notice, the Voluntary Deductions page has been updated to reflect your deduction. You can return to this page to track the deduction status, goal balance, edit current deductions or add deductions in the future.
14.	**Congratulations.** You have entered a voluntary deduction. **End of Procedure.**

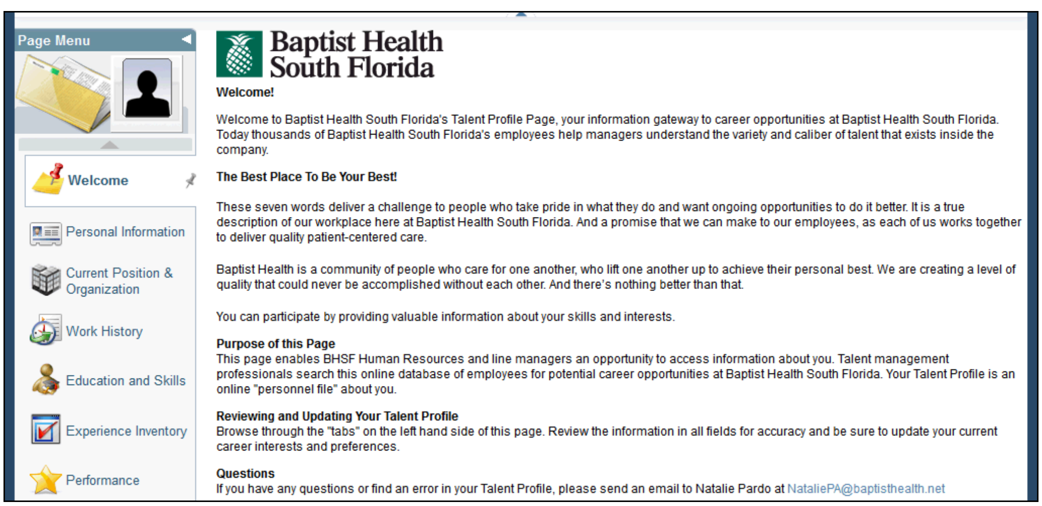
Managing Your Talent Profile

Reviewing Personal Information in Your Talent Profile

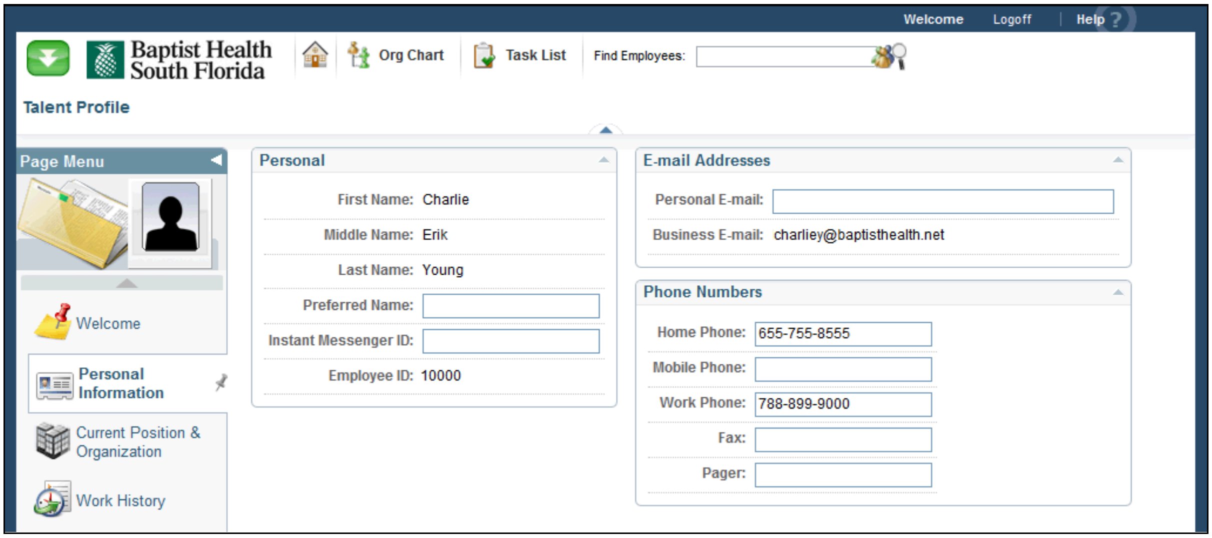
Purpose: Use this transaction to practice reviewing your personal information in your Talent Profile.



Step	Action
1.	Click the **Profile** tab.



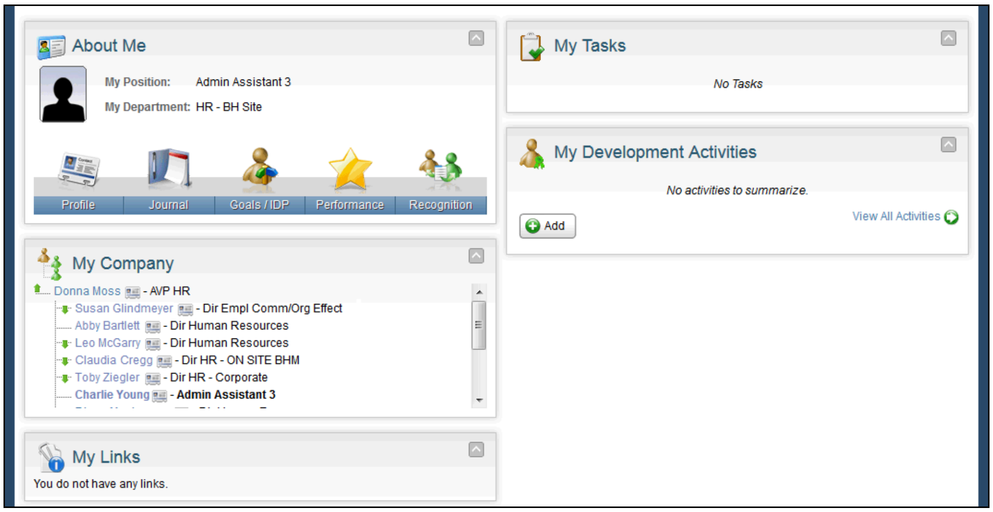
Step	Action
2.	Click the **Personal Information** link. Personal Information



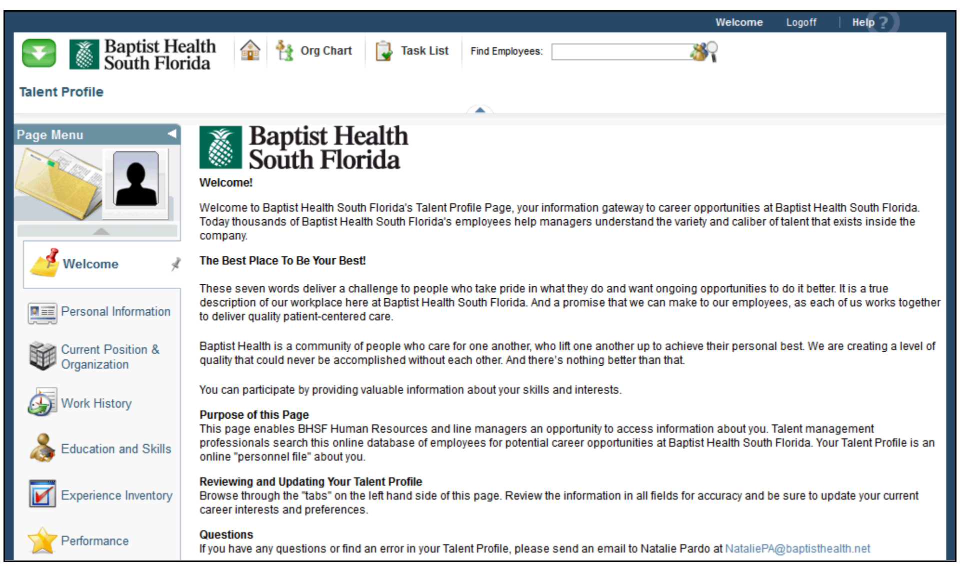
Step	Action
3.	Use the Personal Information page to review your information, including name, employee ID, e-mail addresses, and phone numbers. Note, you can only view your personal information on this page. Any updates must be made through Employee Self Service. See the *Updating Personal Information* simulations for more information.
4.	Click the **Home** button. 
5.	**Congratulations.** You have reviewed your personal information. **End of Procedure.**

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.

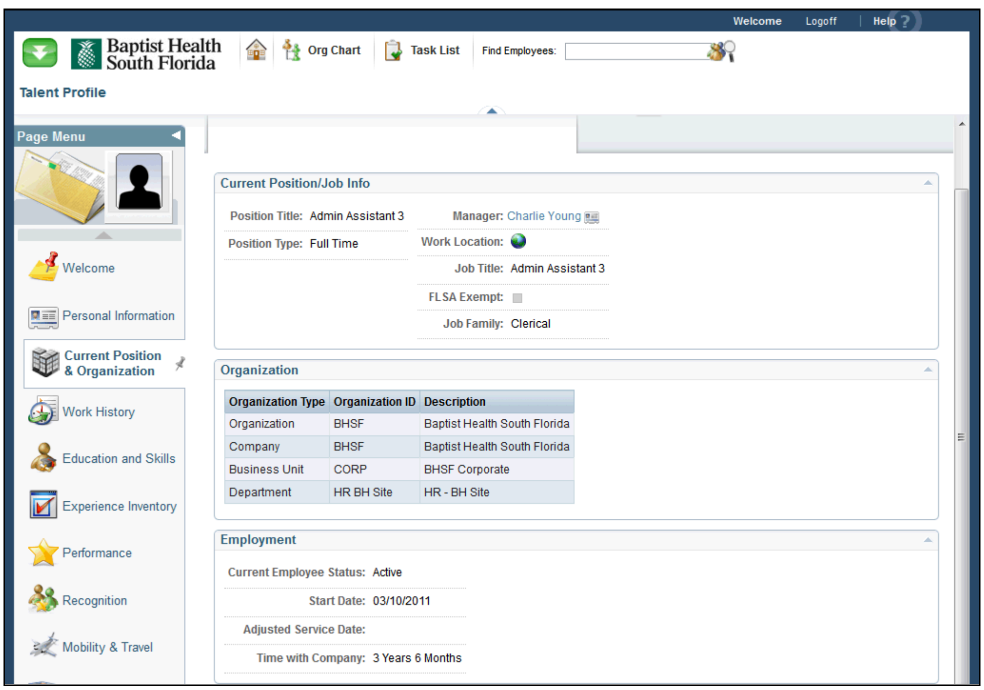


Step	Action
1.	Click the **Profile** tab.



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.

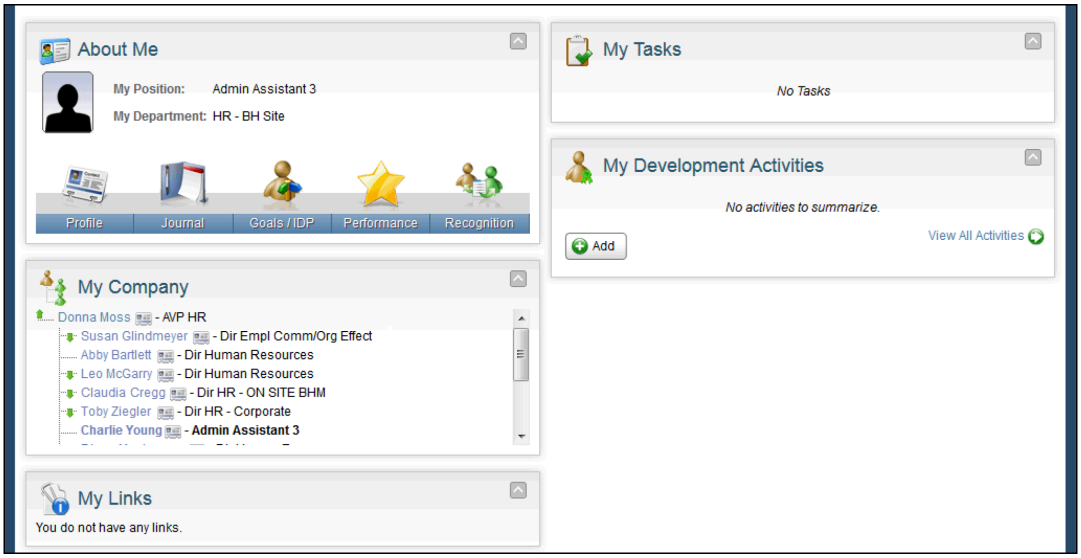


Step	Action
5.	Click the **Home** button. 

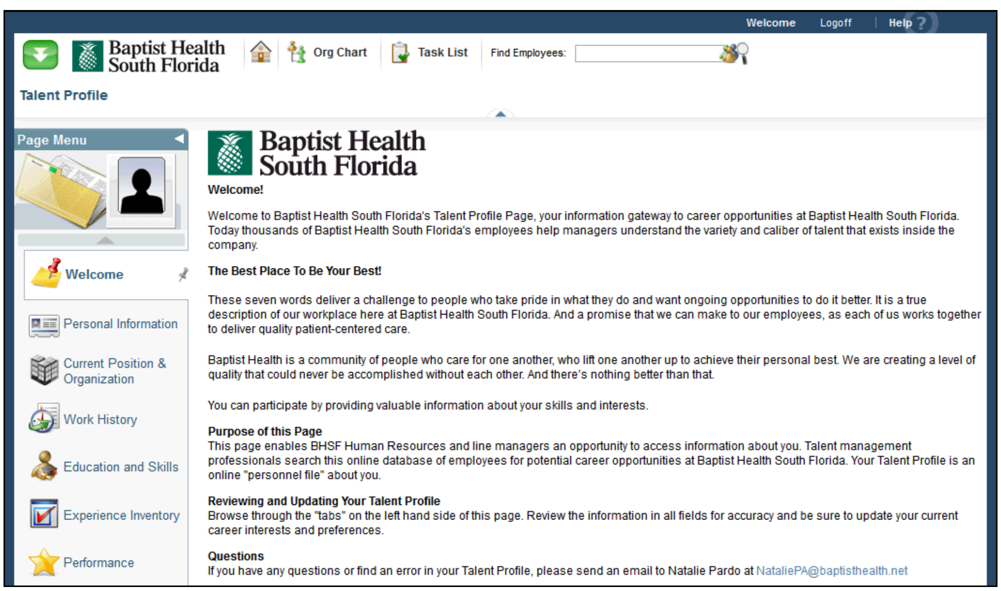
Step	Action
6.	**Congratulations.** You have reviewed your personal and organizational information. **End of Procedure.**

Reviewing Work History Information in Your Talent Profile

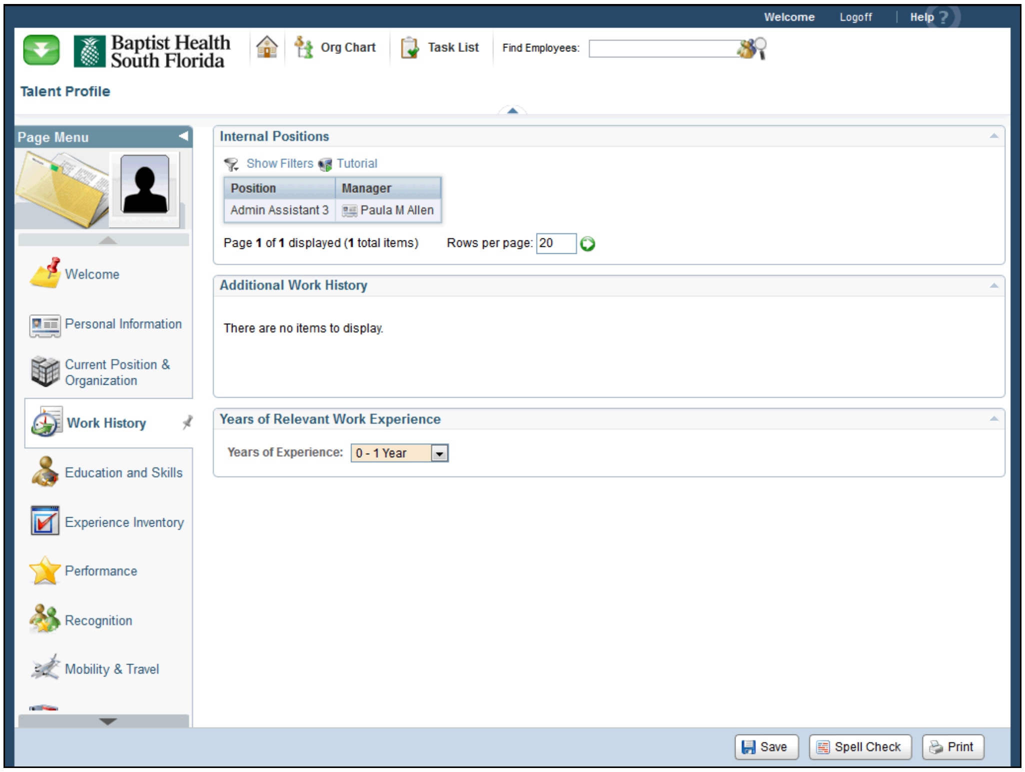
Purpose: Use this transaction to practice reviewing your work history information in your Talent Profile.

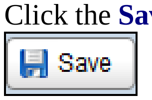


Step	Action
1.	Click the **Profile** tab.



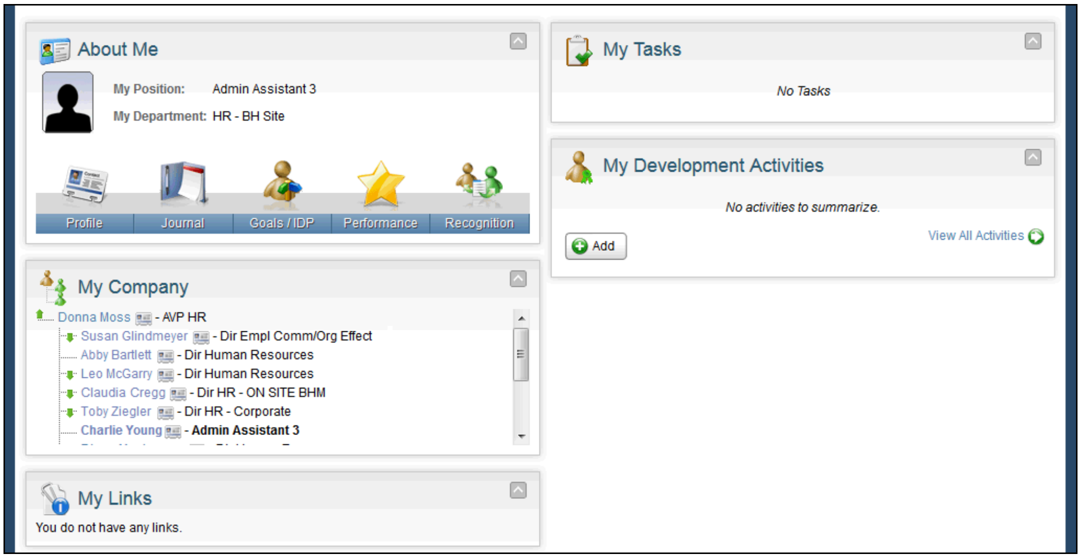
Step	Action
2.	Click the **Work History** link.



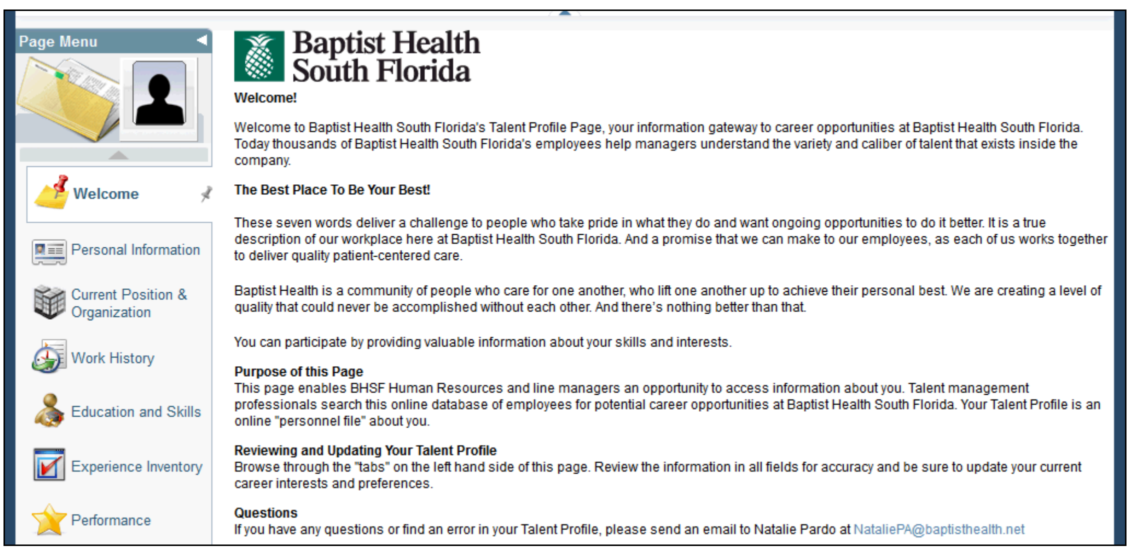
Step	Action
3.	Use this page to review your work history, internal positions information, and review and update your years of relevant work experience. In this example, you will update your years of relevant experience.
4.	Click the button to the right of the **Years of Experience** field. 
5.	Click 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

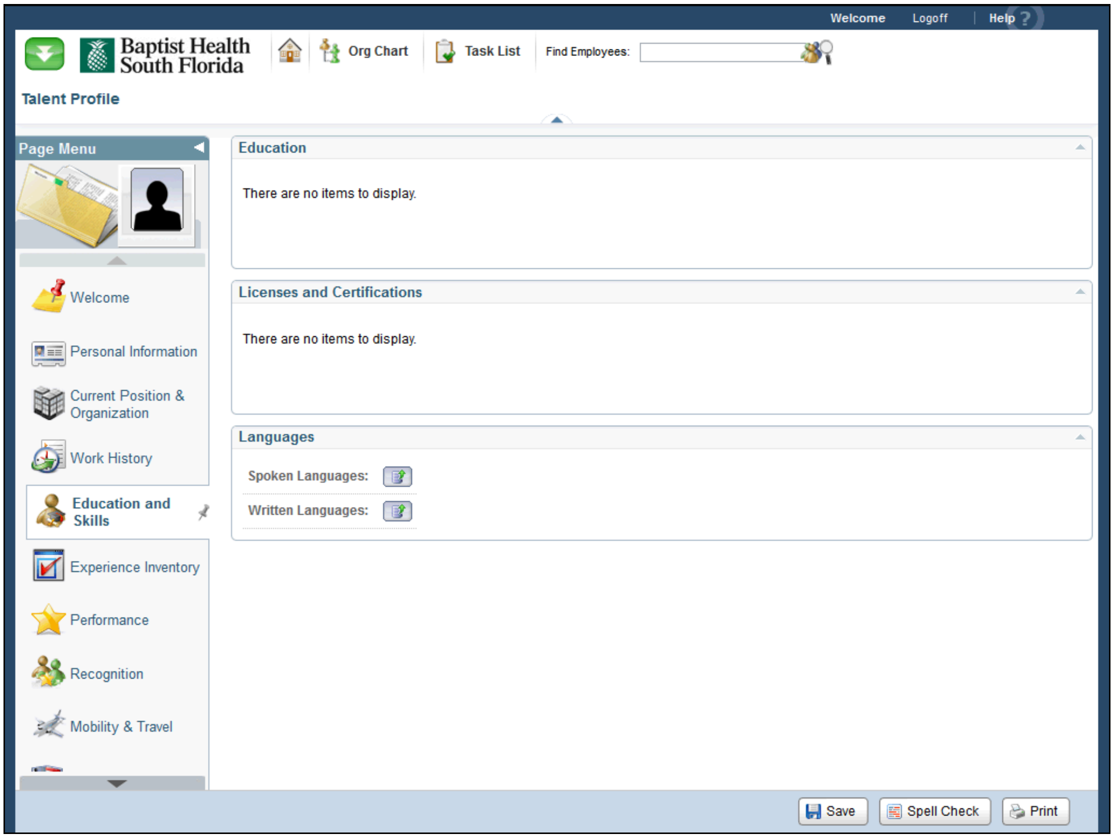
Purpose: Use this transaction to practice reviewing your education and skills information in your Talent Profile.



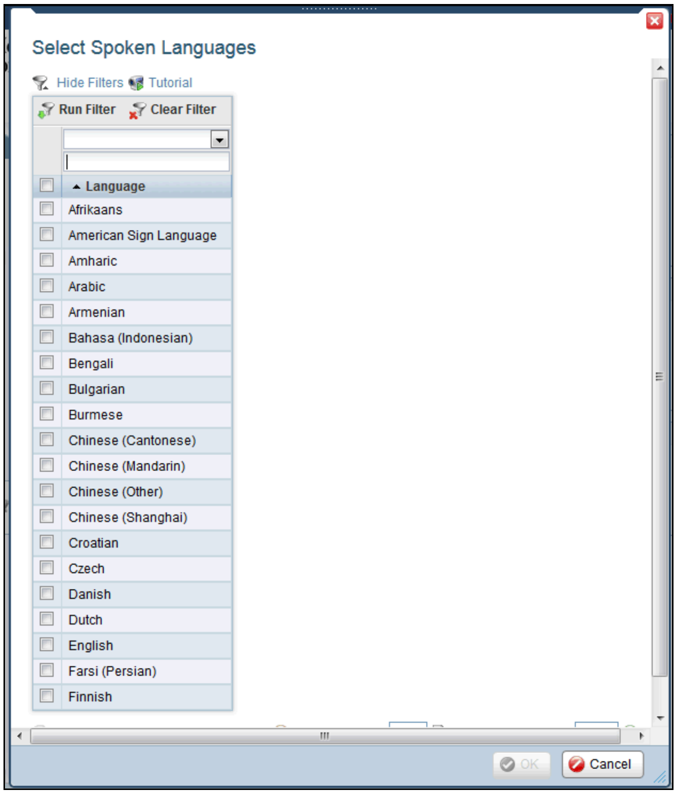
Step	Action
1.	Click the **Profile** tab.



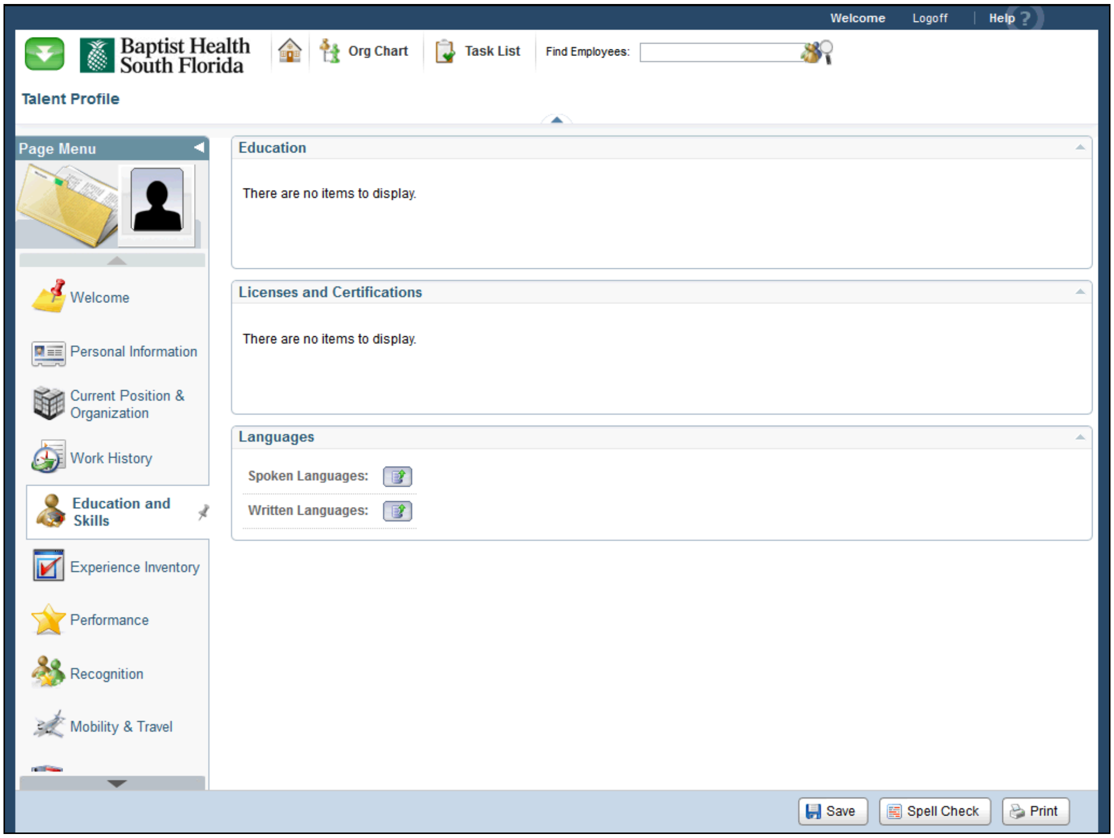
Step	Action
2.	Click the **Education and Skills** link.



Step	Action
3.	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. To update your education and skills, refer to the simulation Updating Personal Profile Information – Licenses, Certifications, and Experience.
4.	Click the **Select** button to view available spoken languages. 



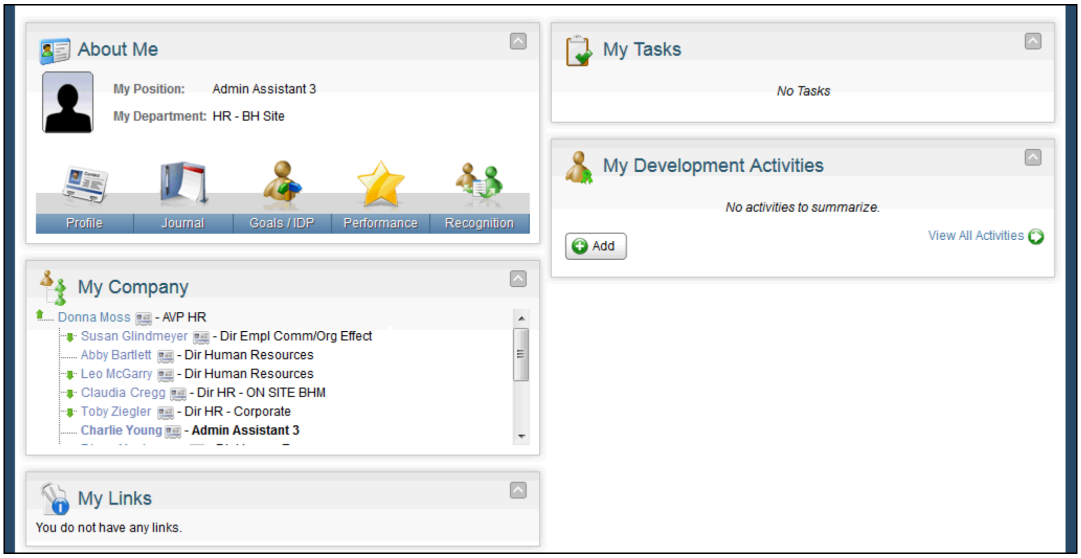
Step	Action
5.	Use this page to search and select a language. In this example, you are not selecting a language. Click the **Cancel** button.



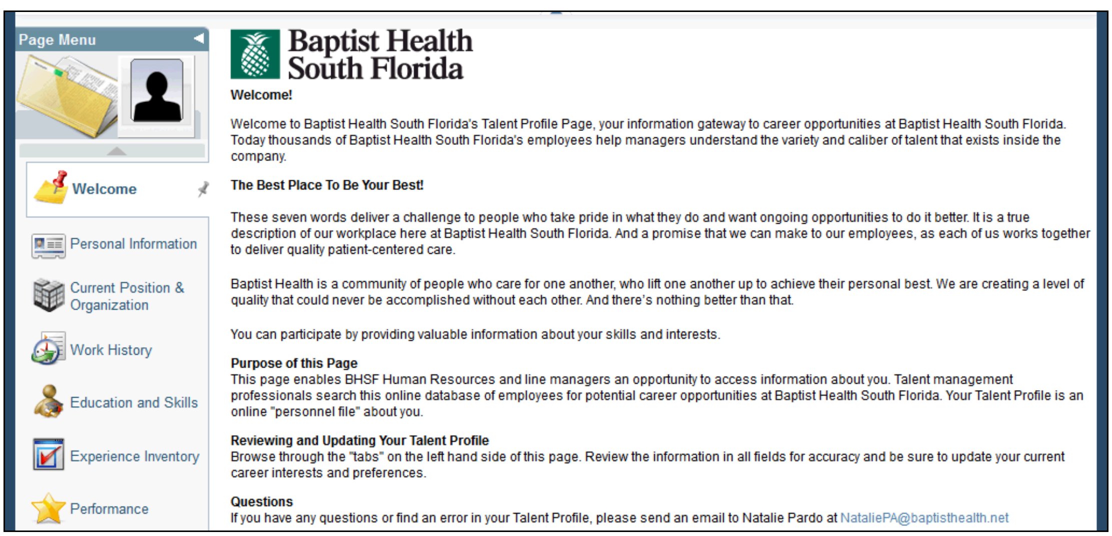
Step	Action
6.	Click the **Home** button. 
7.	**Congratulations.** You have reviewed your education and skills information. **End of Procedure.**

Updating Experience Inventory Information in Your Talent Profile

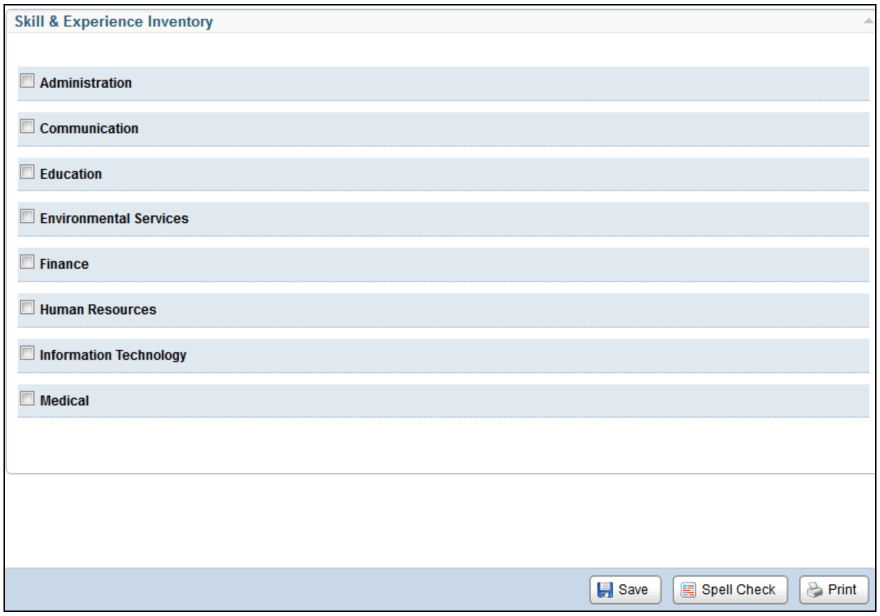
Purpose: Use this transaction to practice updating your experience inventory information in your Talent Profile.



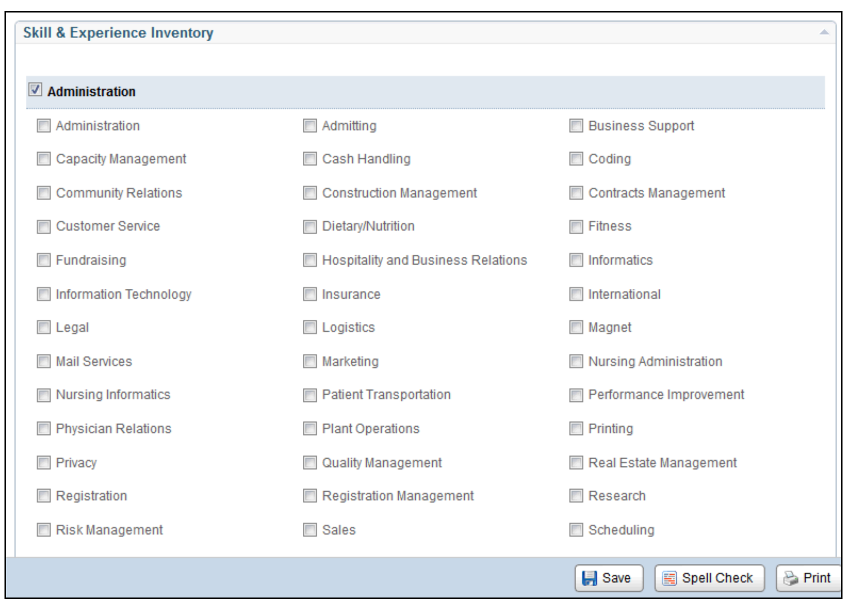
Step	Action
1.	Click the **Profile** tab.



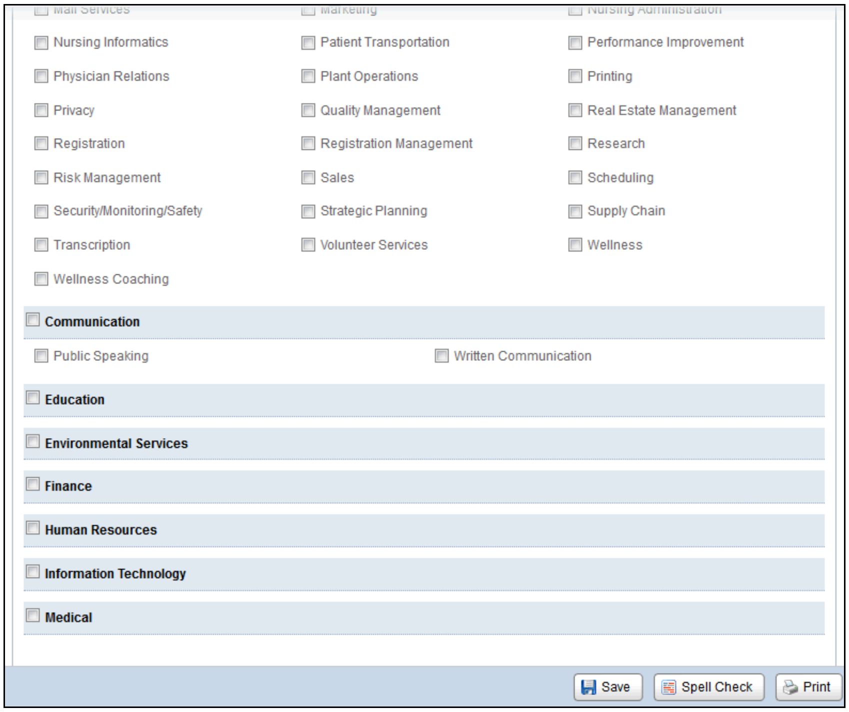
Step	Action
2.	Click the **Experience Inventory** link.

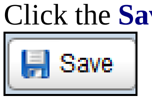


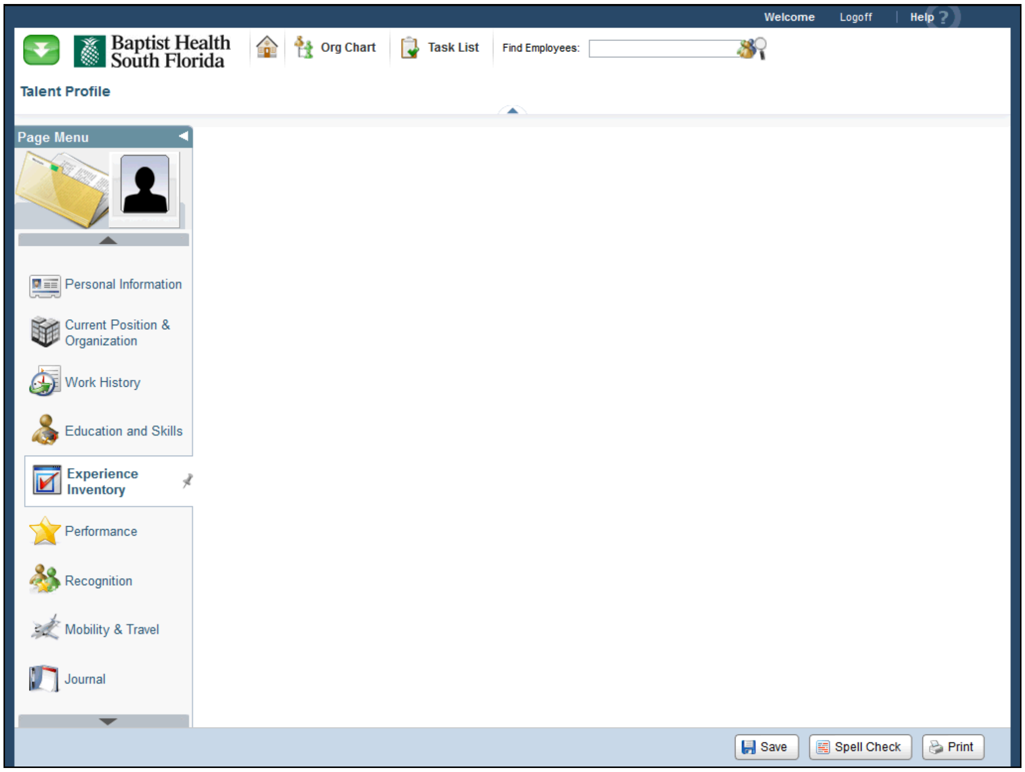
Step	Action
3.	Use this page to update your experience inventory. To add an experience or skill, click the check box to the left of the appropriate category that best describes the area of your experience or skill.
4.	Click the **Administration** option to expand available experiences and skills associated with the Administration category. 



Step	Action
5.	Click the **Administration** option to add it to your experience inventory.
6.	Scroll down the page.



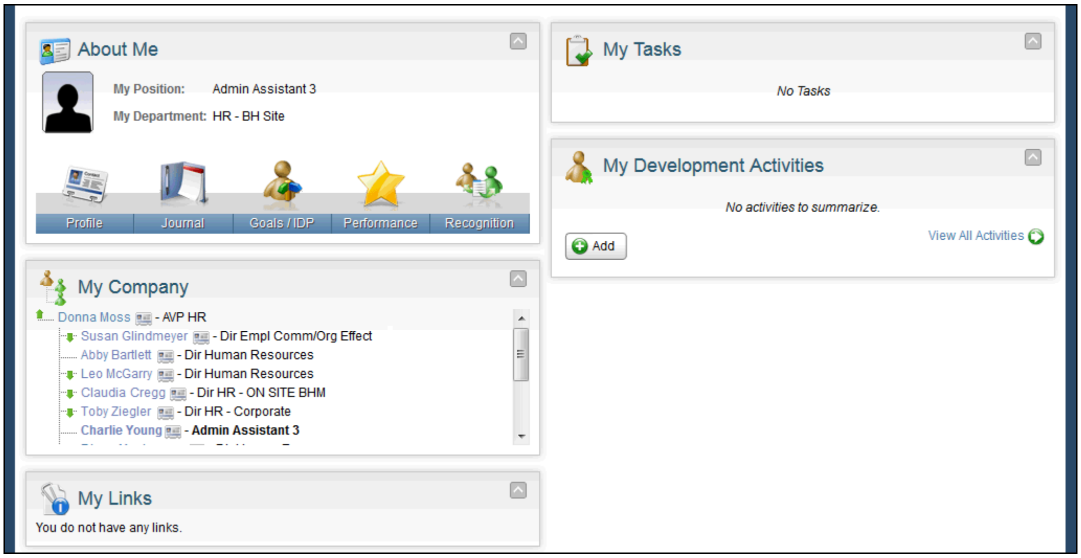
Step	Action
7.	Click the **Communication** option to expand available experiences and skills associated with the Communication category.
8.	Click the **Written Communication** option to add it to your experience inventory.
9.	Click the **Save** button. 



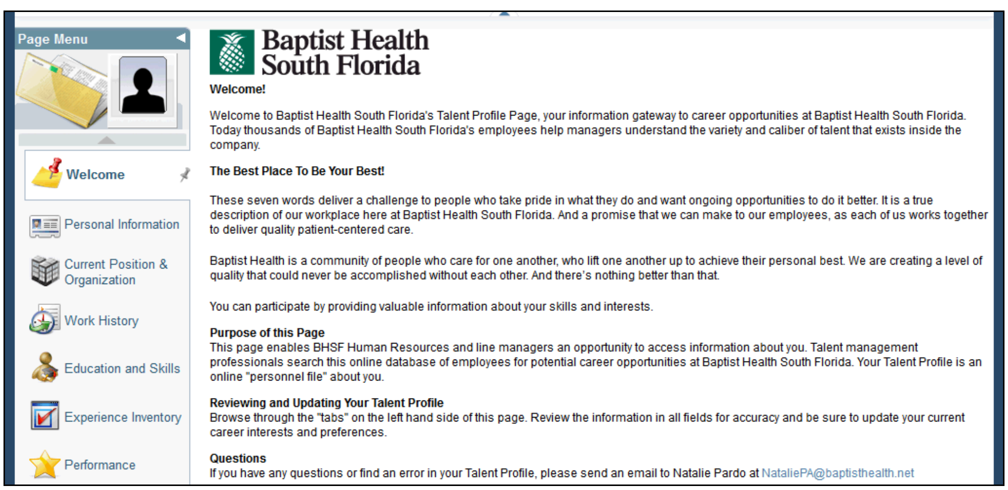
Step	Action
10.	Click the **Home** button. 
11.	**Congratulations.** You have updated your experience inventory information. **End of Procedure.**

Reviewing Performance Information in Your Talent Profile

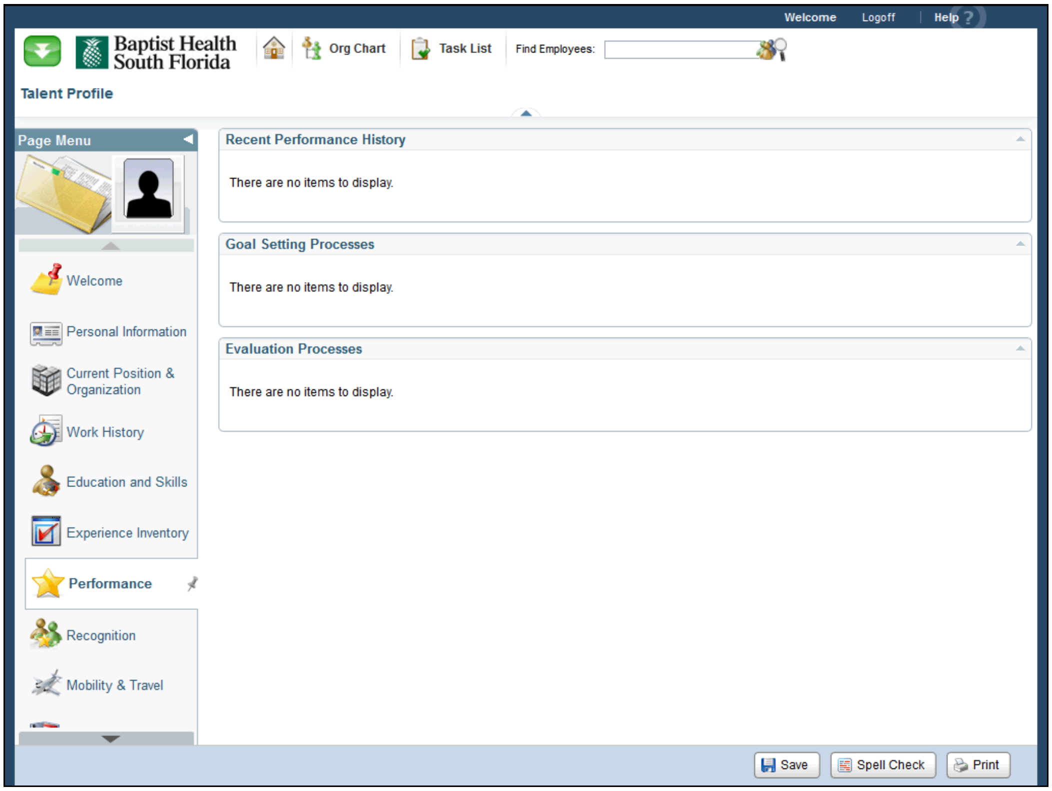
Purpose: Use this transaction to practice reviewing your performance information in your Talent Profile.



Step	Action
1.	Click the **Profile** tab.



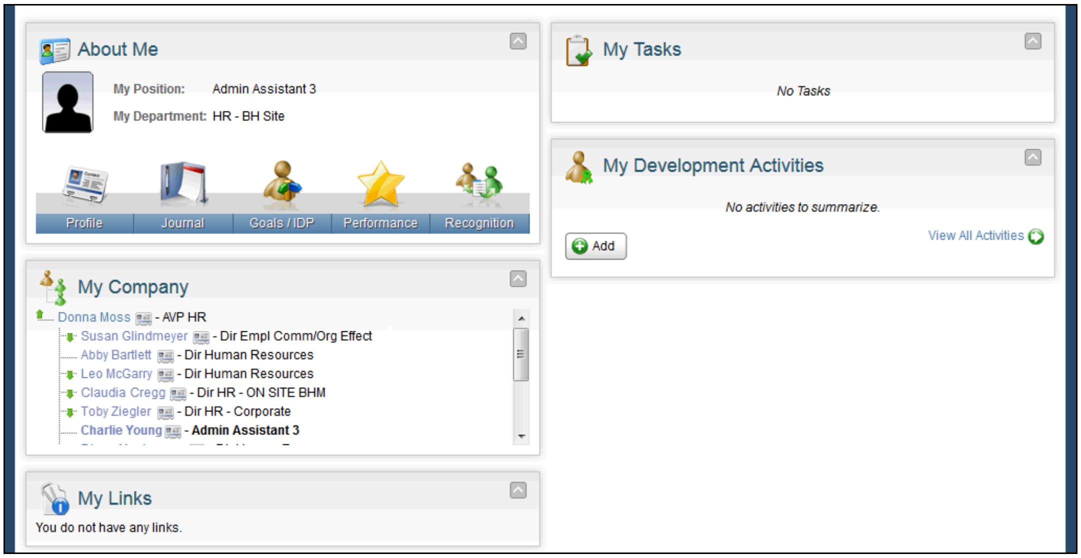
Step	Action
2.	Click the **Performance** link.



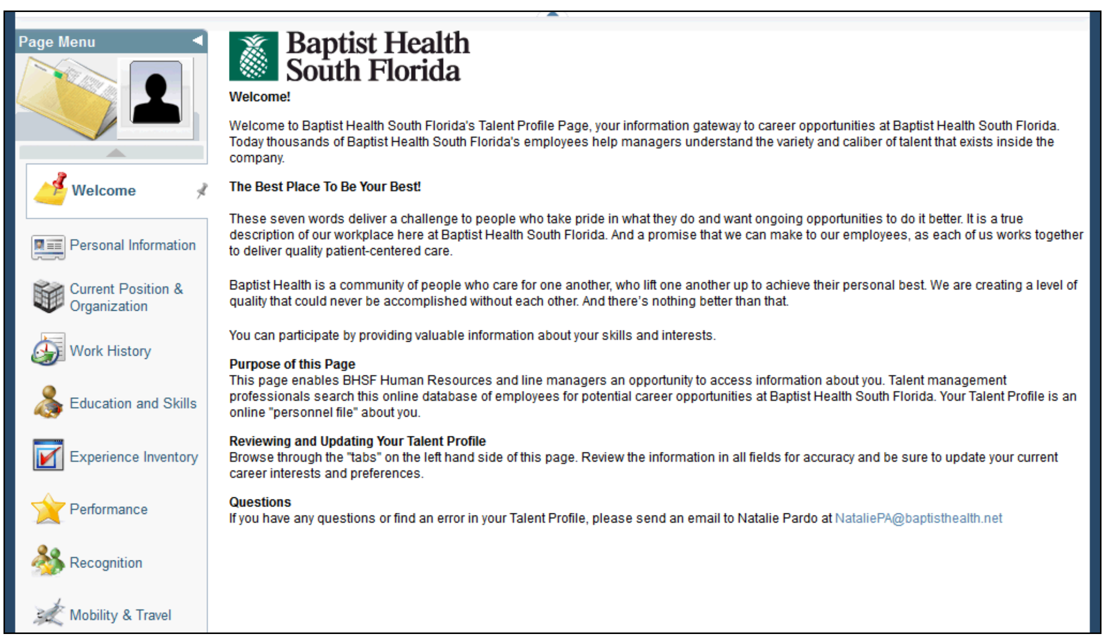
Step	Action
3.	Use this page to review your performance information. You can review recent performance history, goal setting processes, and evaluation processes. In this example, this employee is a new hire and therefore no performance information is available.
4.	Click the **Home** button. 
5.	**Congratulations.** You have reviewed your performance information. **End of Procedure.**

Updating Mobility and Travel Preferences in Your Talent Profile

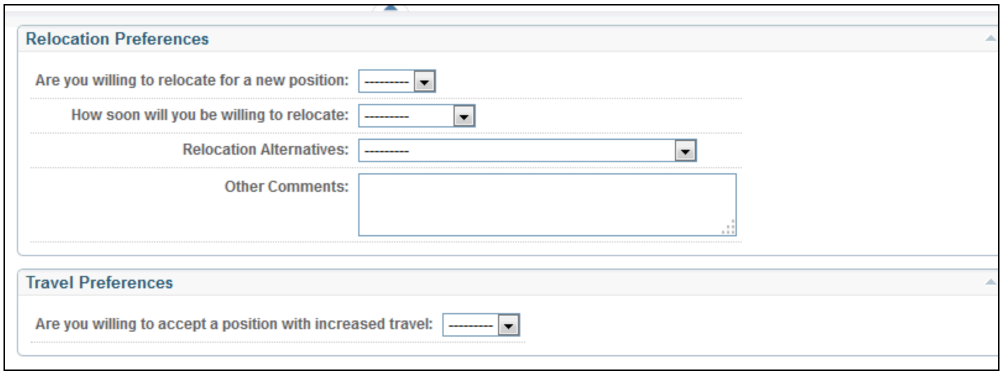
Purpose: Use this transaction to practice updating your mobility and travel preferences in your Talent Profile.



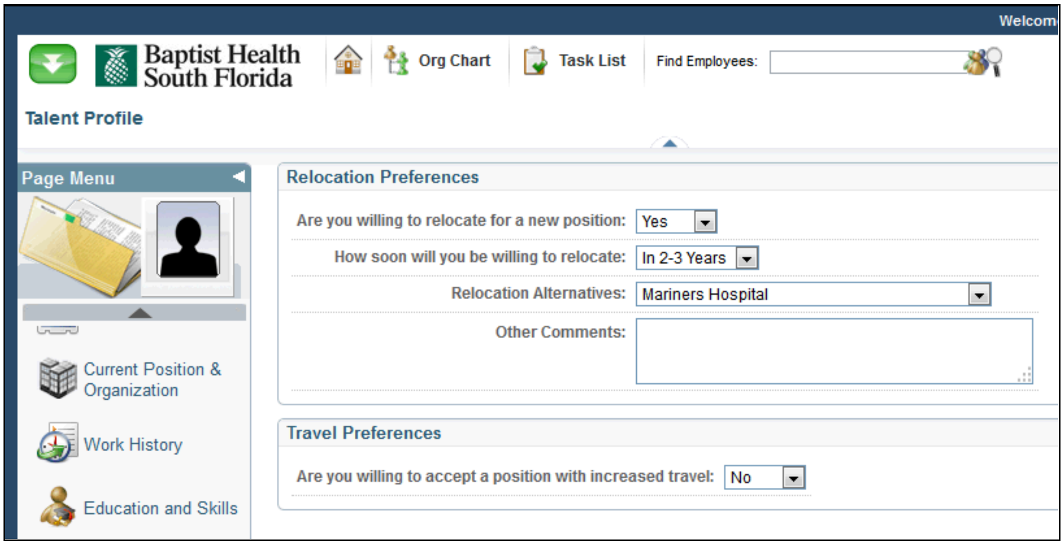
Step	Action
1.	Click the **Profile** tab.



Step	Action
2.	Click the **Mobility & Travel** link.



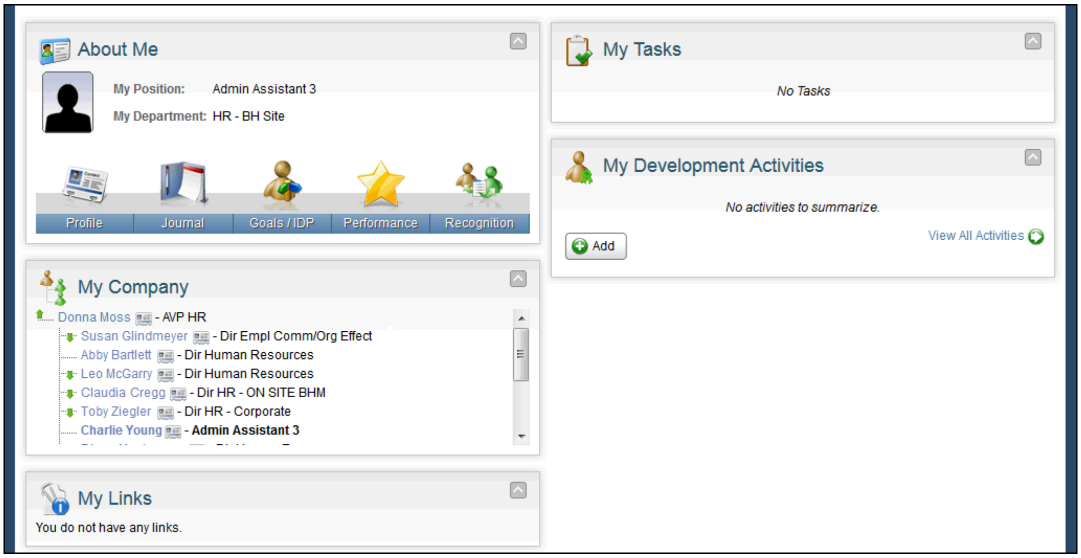
Step	Action
3.	Use this page to review and update your mobility and travel preferences, including relocation availability and location preferences.
4.	Click the button to the right of the **Are you willing to relocate for a new position** field.
5.	Click an entry in the list.
6.	Click the button to the 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. Save



Step	Action
14.	Click the **Home** button. 
15.	**Congratulations.** You have updated your mobility and travel preferences. **End of Procedure.**

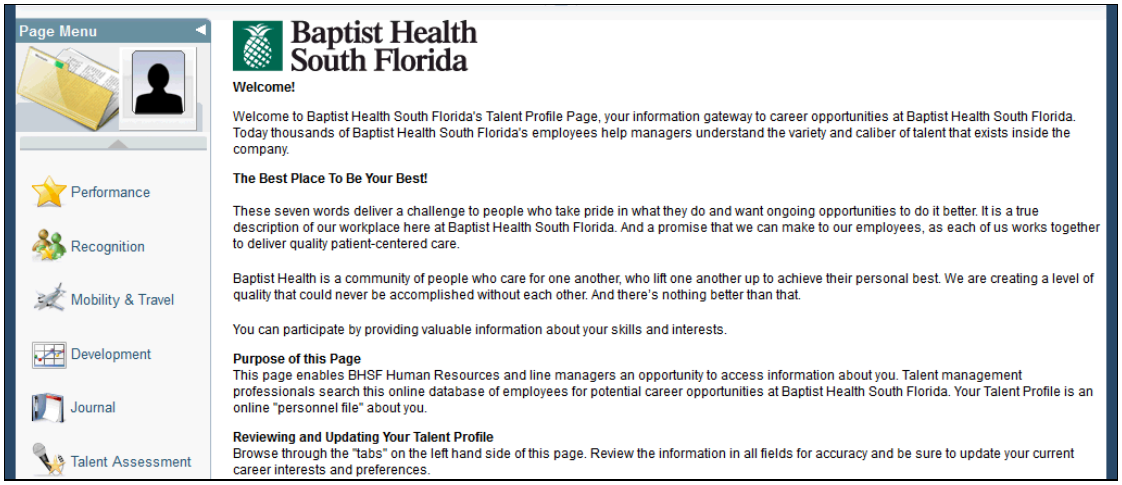
Updating Development Activities in Your Talent Profile

Purpose: Use this transaction to practice updating your development activities in your Talent Profile.

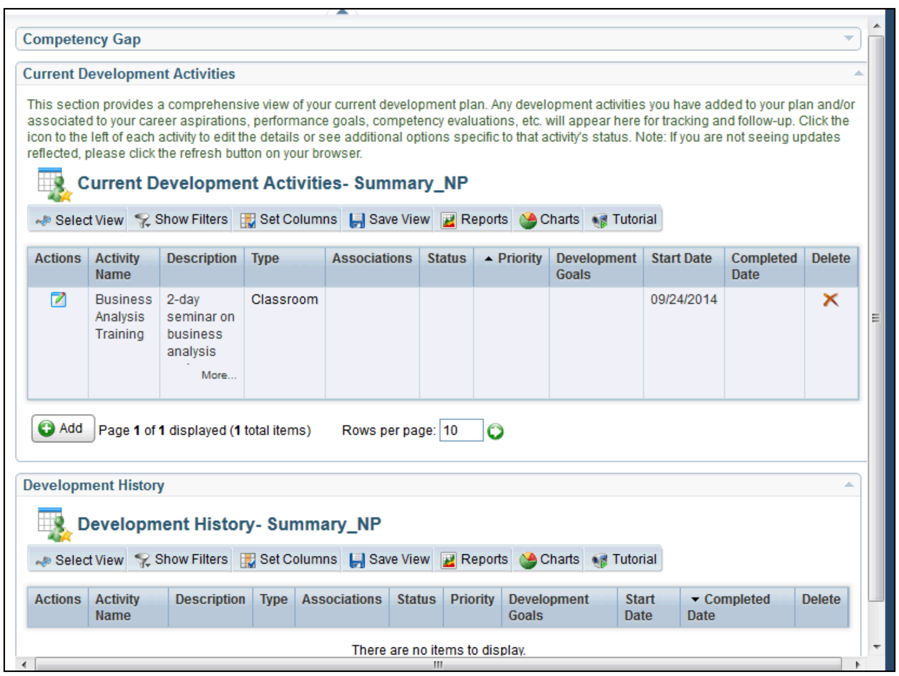


Step	Action
1.	Click the **Profile** tab.

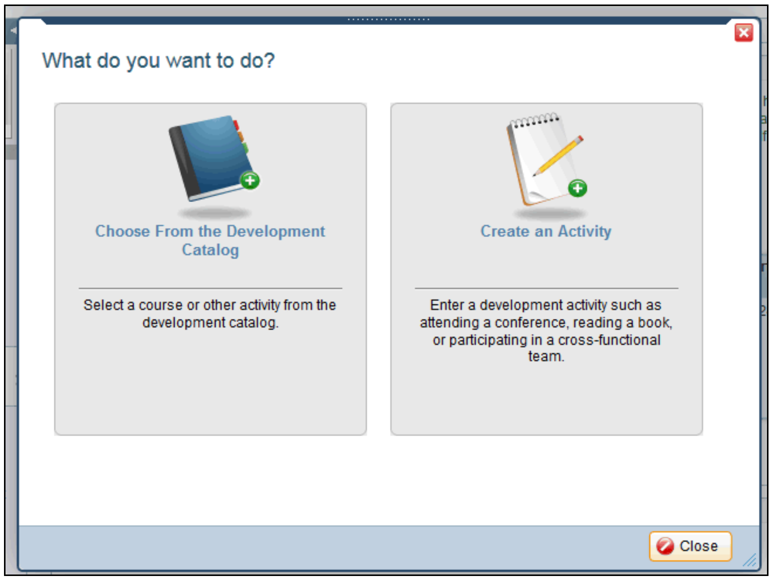
Step	Action
2.	Click the **Down Arrow** button. 



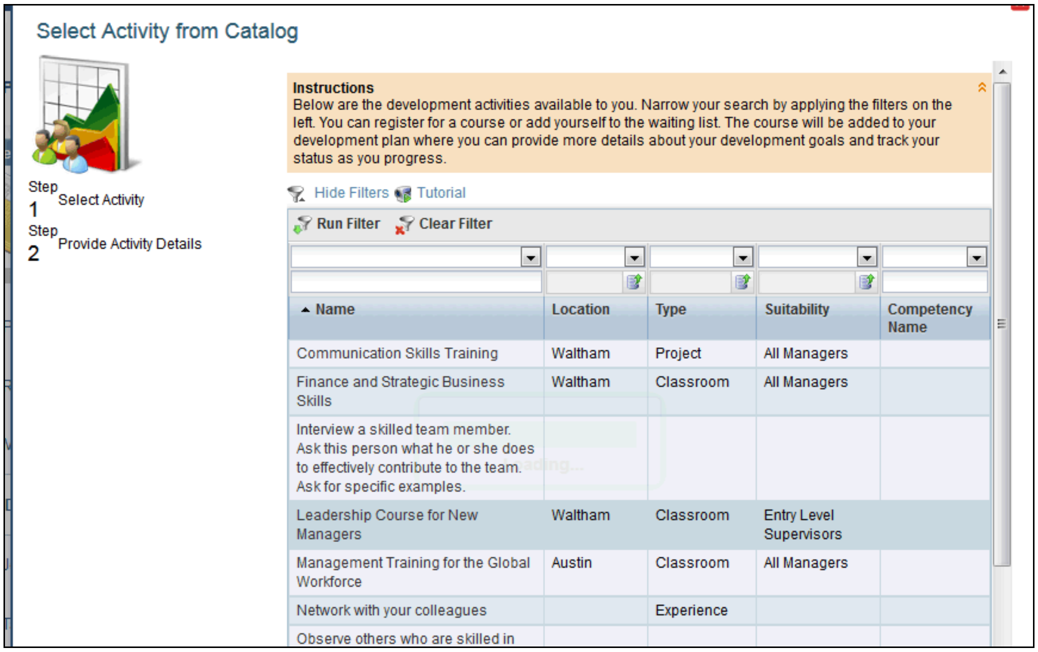
Step	Action
3.	Click the **Development** link.



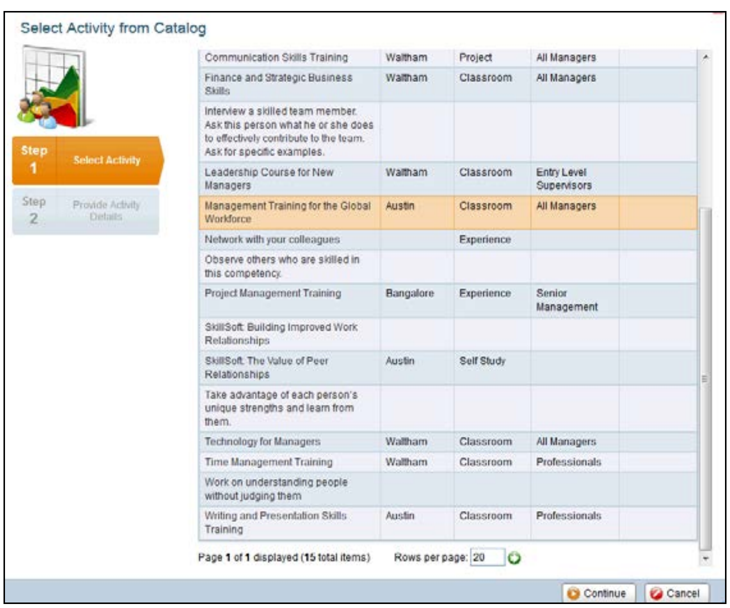
Step	Action
4.	Use this page to review your development history, upcoming activities, and to add new developmental activities to fulfill a current position requirement or career aspiration. In this example, you will add an activity.
5.	Click the **Add** button. 

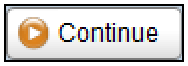


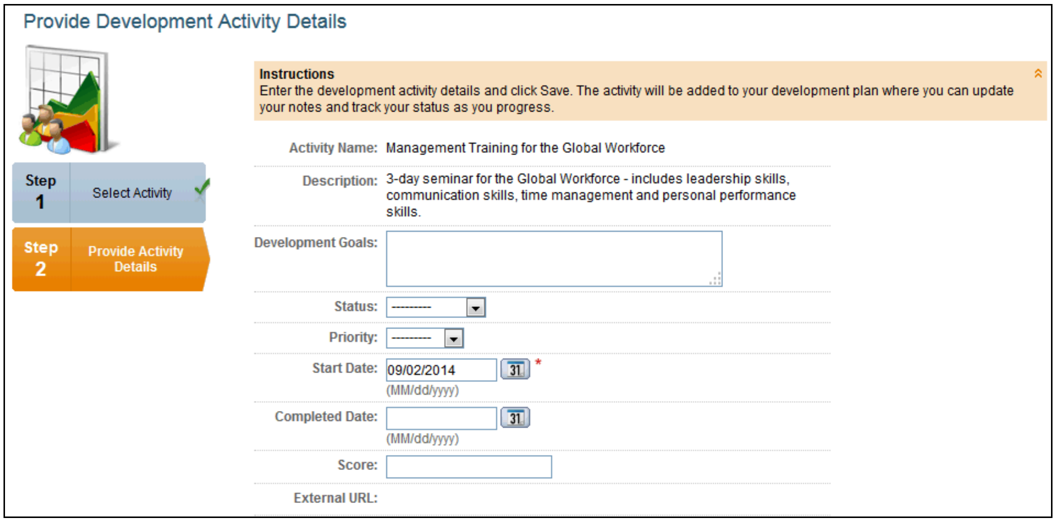
Step	Action
6.	When adding an activity, you can either create an activity or select one from the development catalog. In this example, you will select from the development catalog.
7.	Click the **Choose From the Development Catalog** link.



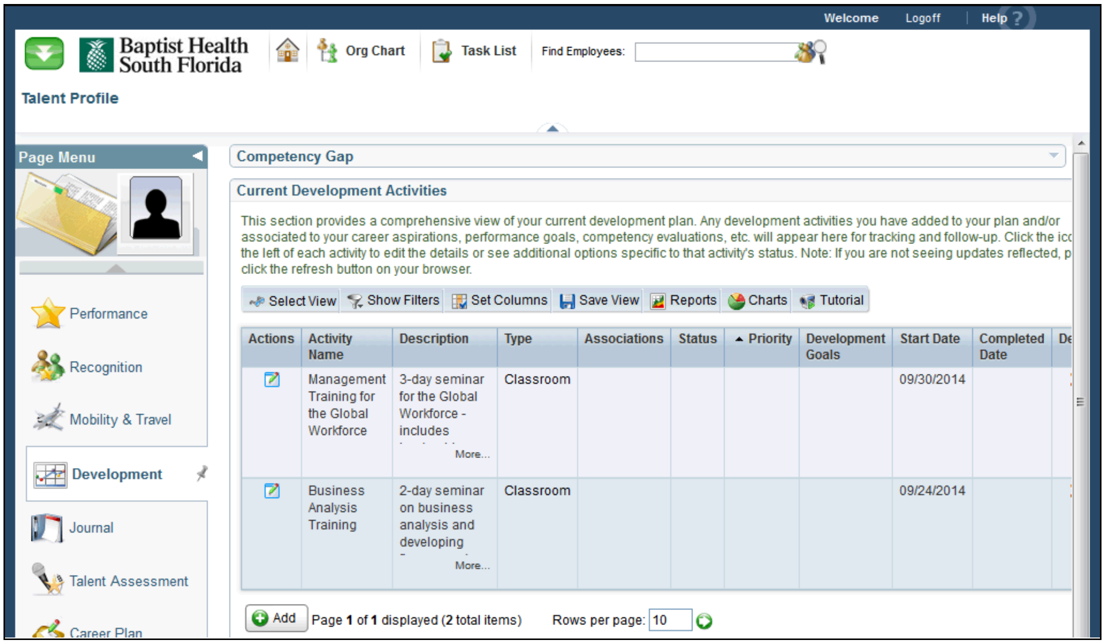
Step	Action
8.	This page displays the available developmental activities. You can either scroll through the page or search for a specific activity. Your course selection will be added to your development plan where you can provide more details about your developmental goals and track your progress.
9.	Scroll down the page.



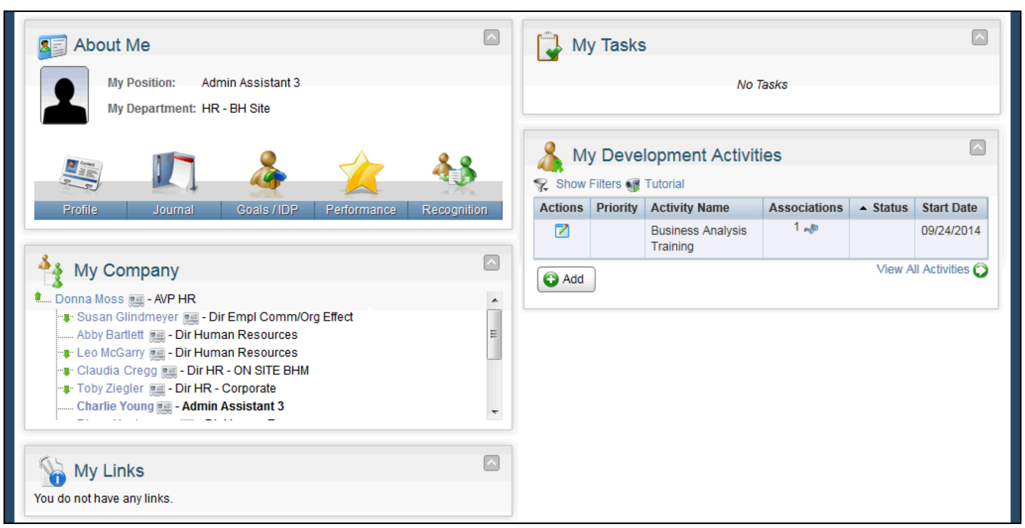
Step	Action
10.	Click the appropriate **Activity Name**.
11.	Click the **Continue** button to provide details about the selected activity. 



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. 



Step	Action
15.	Click the **Home** button. 
16.	Notice, the My Development Activities section has been updated with your added activity.

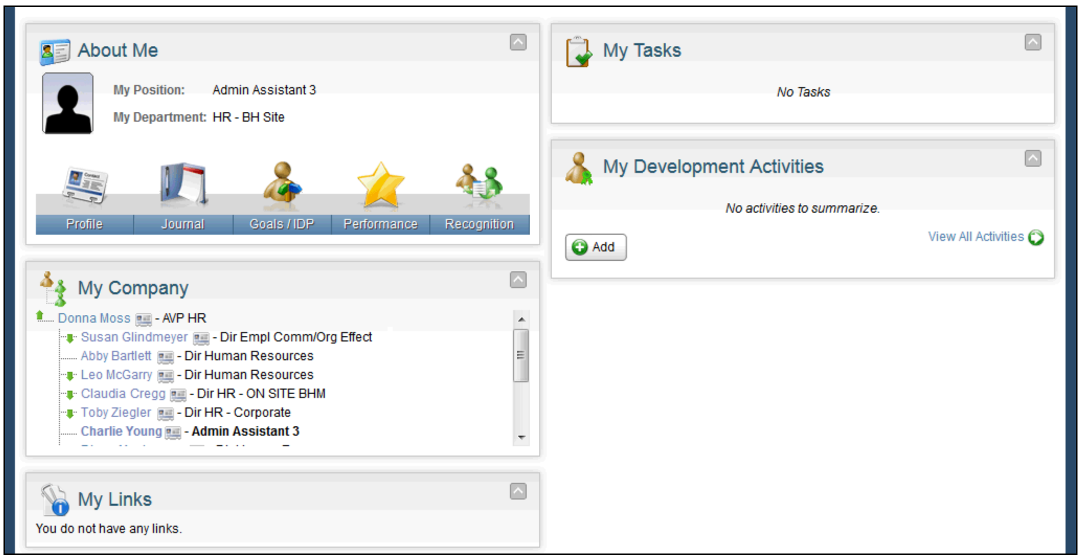


Step	Action
17.	**Congratulations.** You have updated and added a development activity. **End of Procedure.**

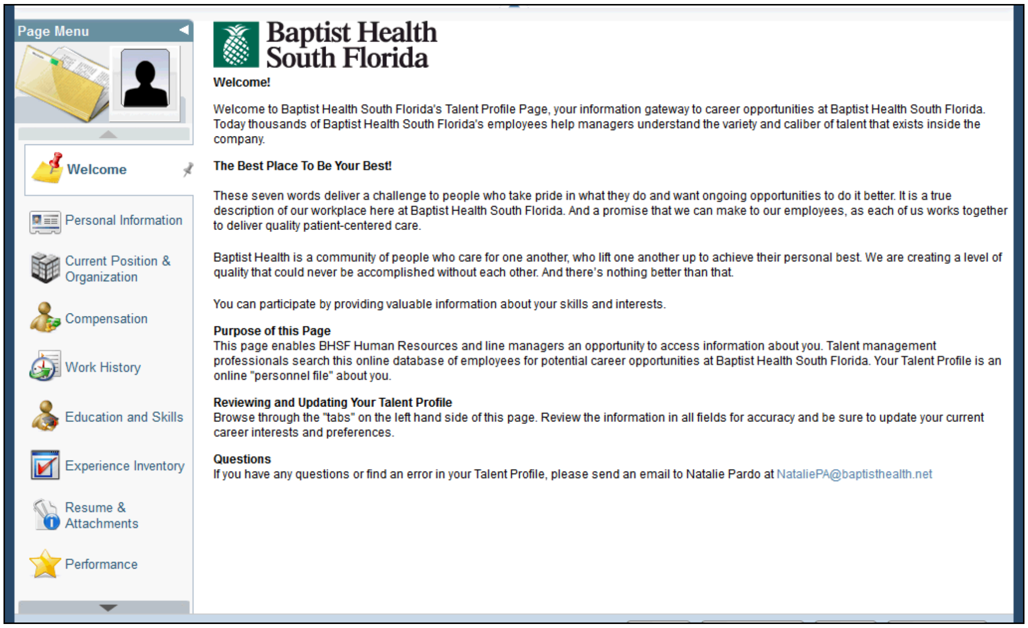
Reviewing and Updating Journal Entries in Your Talent Profile

Purpose: Use this transaction to practice reviewing and updating your journal entries in your Talent Profile.

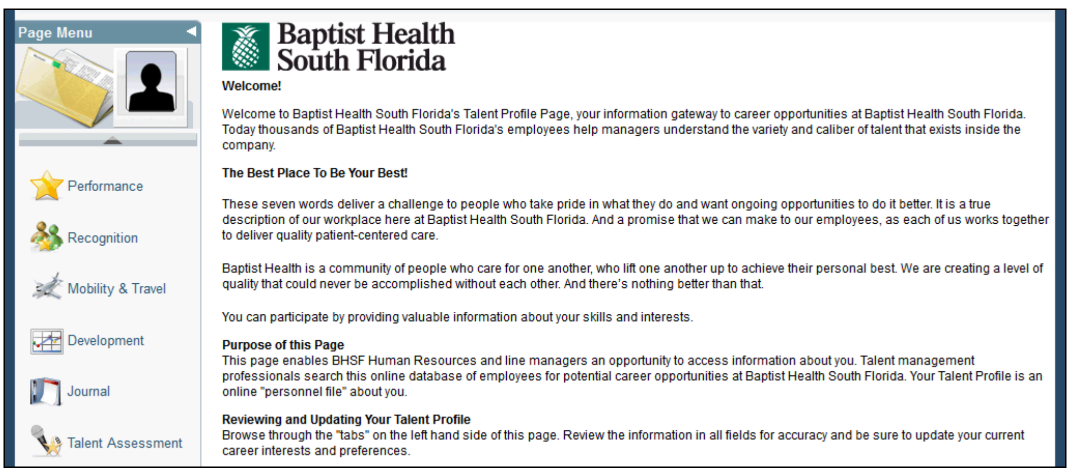
Step	Action
1.	To review and update your Journal Entries, you can click the Journal tab or you can access it through the Profile tab. In this example, you will access it through the Profile tab.



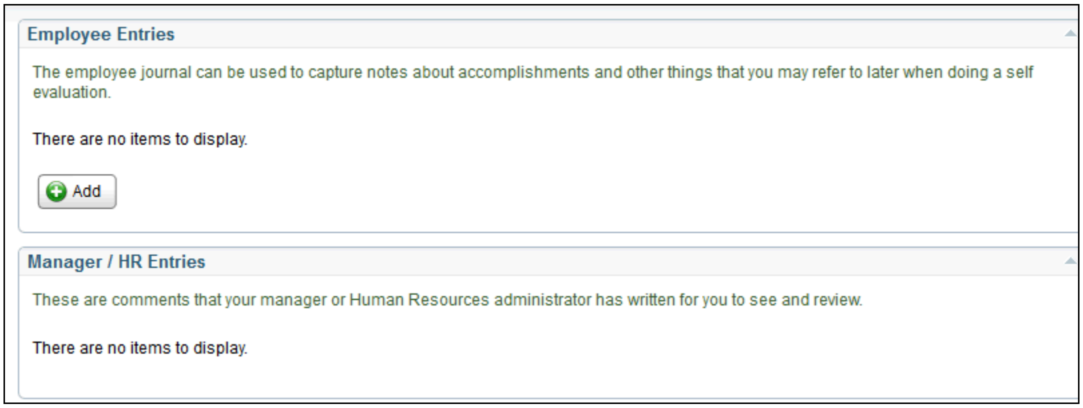
Step	Action
2.	Click the **Profile** tab.



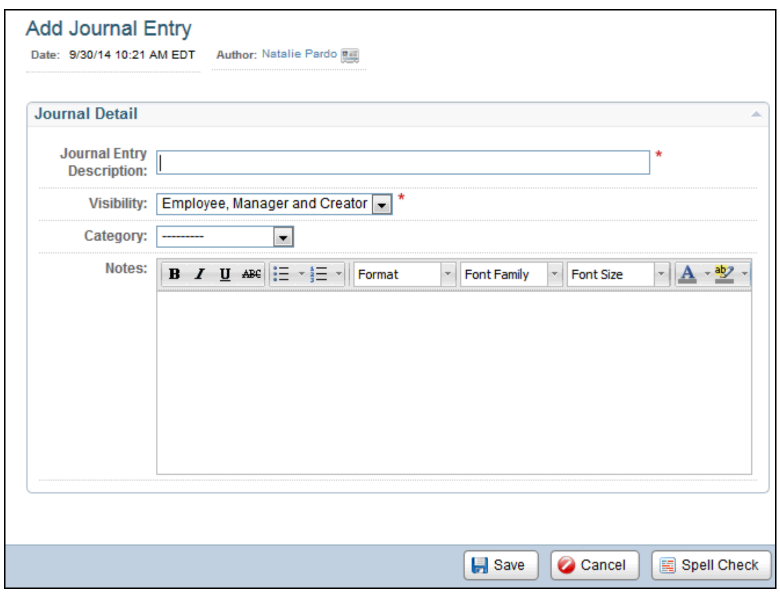
Step	Action
3.	Click the **Down Arrow** button. 



Step	Action
4.	Click the **Journal** link.

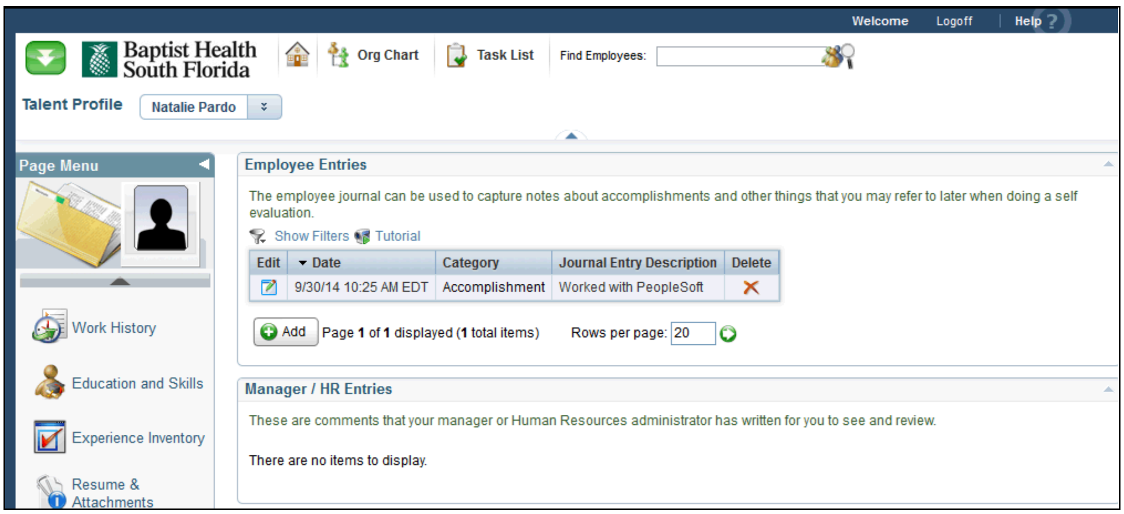


Step	Action
5.	Use this page to review past journal entries that you, your manager, or HR has entered regarding your performance. In this example, there are no existing entries. You can create an entry to note accomplishments, experiences, and other things you may refer to later when doing a self evaluation.
6.	Click the **Add** button. 



Step	Action
7.	Enter the desired information into the **Journal Entry Description** field.

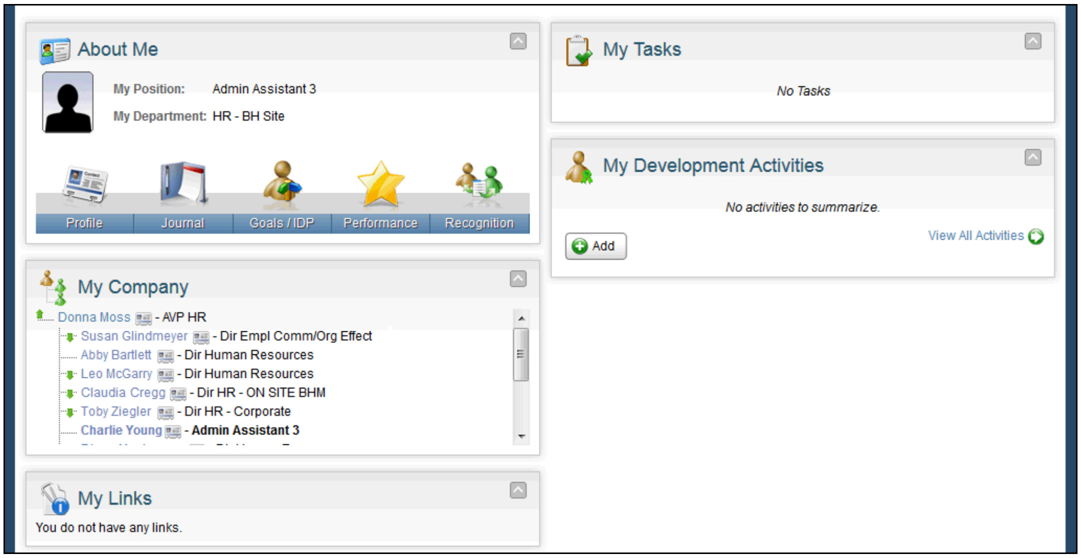
Step	Action
8.	Click the button to the right of the **Visibility** field. 
9.	Use the visibility field to select who you would like to enable to view your entry. In this example, you will keep the default setting.
10.	Click the button to the right of the **Category** field. 
11.	Click the appropriate **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. 



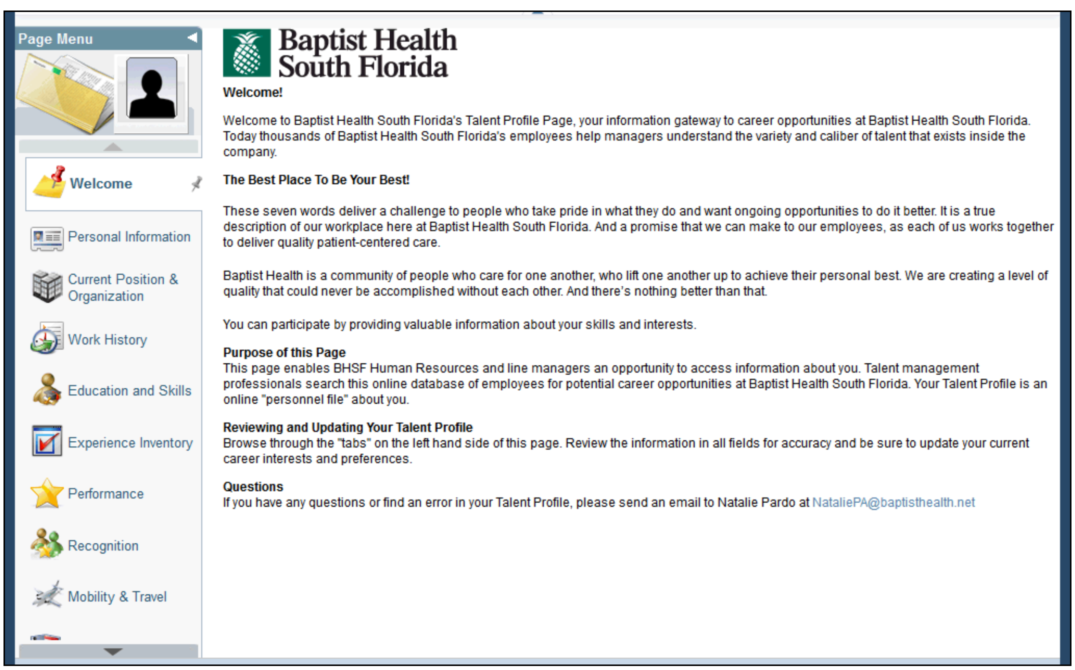
Step	Action
15.	Notice, the Employee Entries section has been updated with your journal entry.
16.	Click the **Home** button. 
17.	**Congratulations.** You have reviewed and added a journal entry. **End of Procedure.**

Using Career Plan in Your Talent Profile

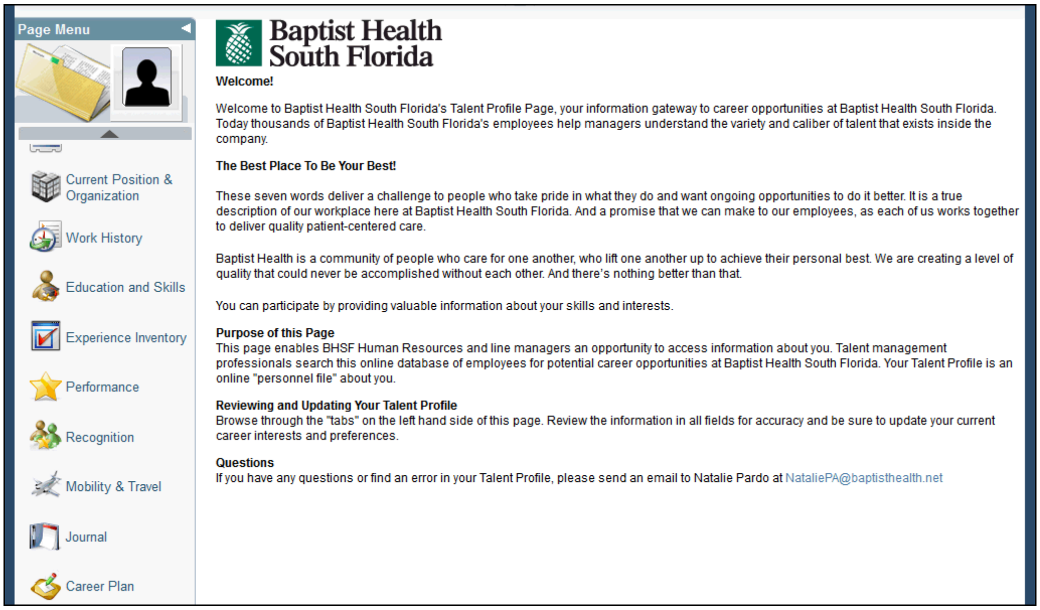
Purpose: Use this transaction to practice using the Career Plan tools, including Career Path and Career Aspiration in your Talent Profile.



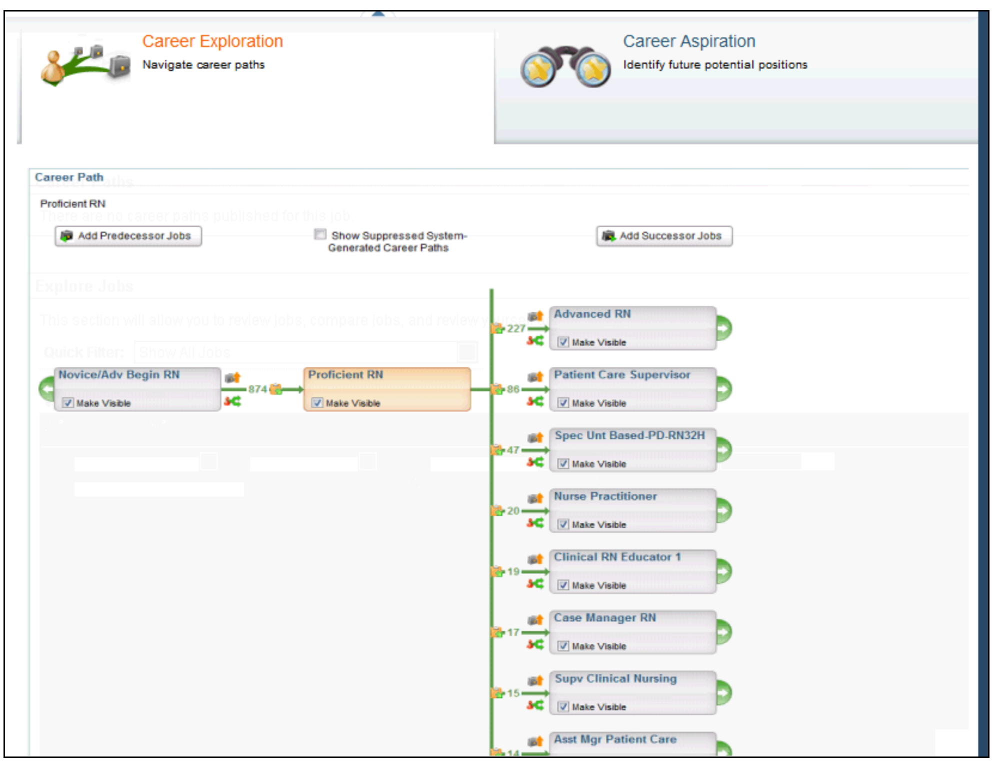
Step	Action
1.	Click the **Profile** tab.



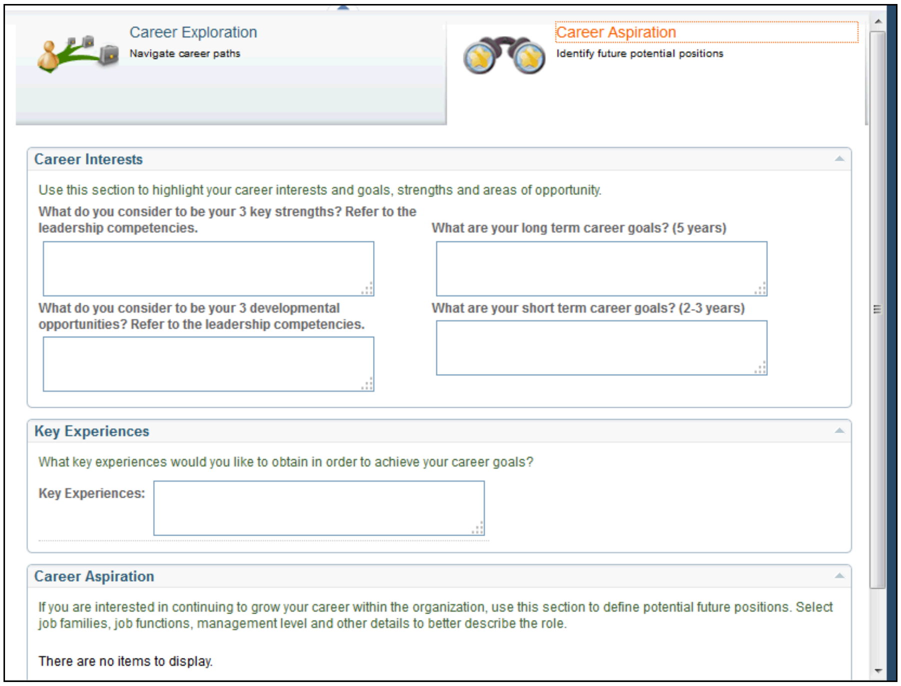
Step	Action
2.	Click the **Down Arrow** button. 



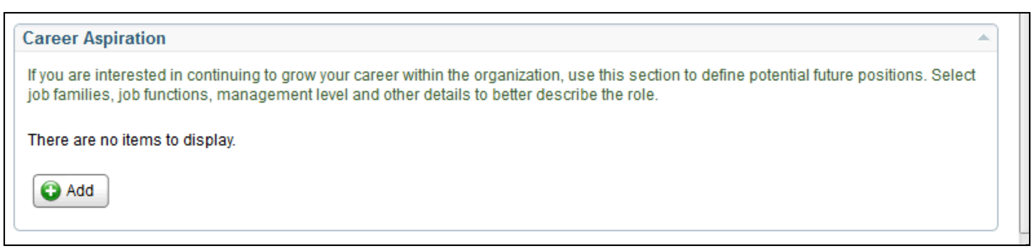
Step	Action
3.	Click the **Career Plan** link.



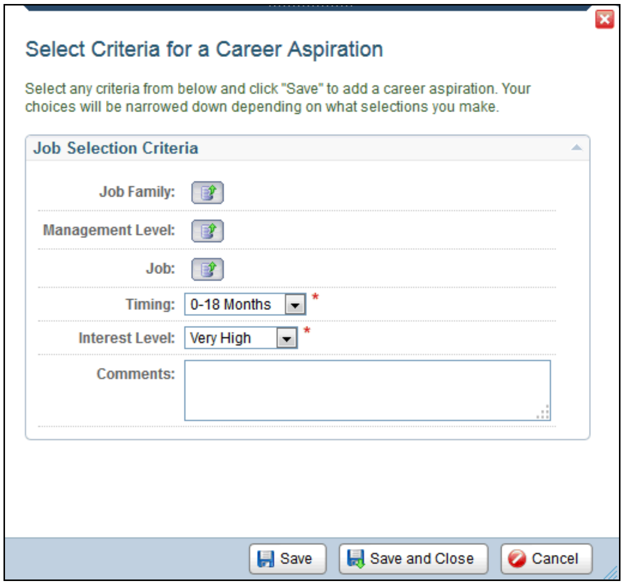
Step	Action
4.	Use the Career Exploration page to navigate career paths for your job.
5.	Click the **Career Aspiration** link.



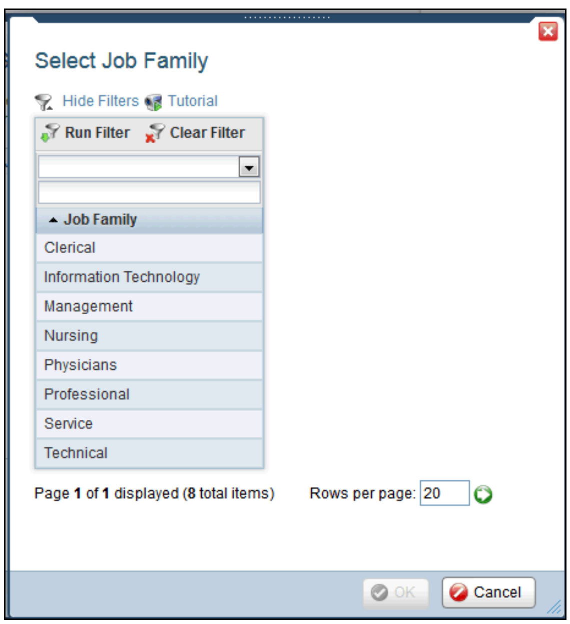
Step	Action
6.	Use the Career Aspiration page to highlight your career interests, goals, future experiences likely to help you obtain your goals, and identify future potential positions. In this example, you will add a career aspiration.
7.	Scroll down the page.



Step	Action
8.	Click the **Add** button. 

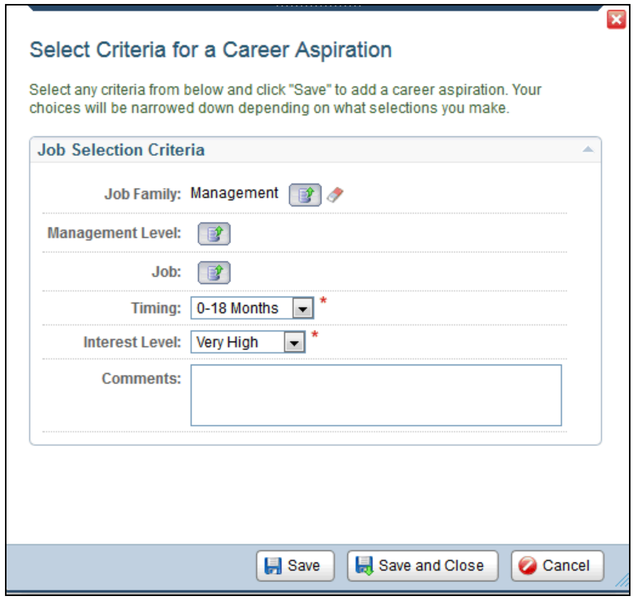


Step	Action
9.	Use this page to search for and select a career aspiration. To narrow your search results, select the appropriate job selection criteria.
10.	Click the **Select** button to search and select a job family. 

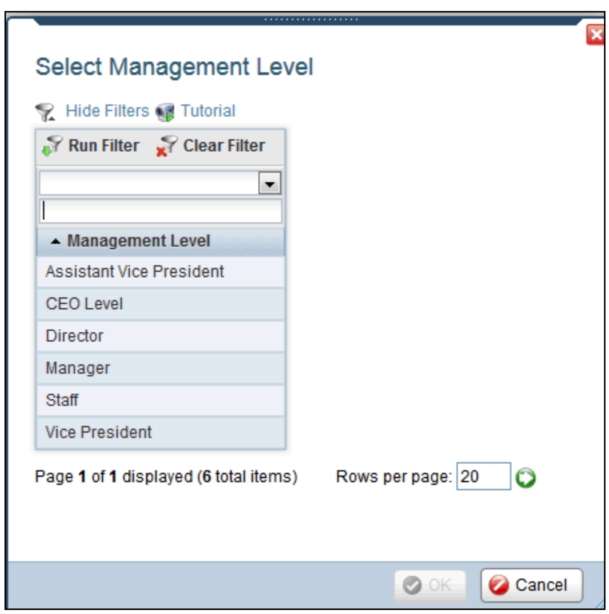


Step	Action
11.	Click the appropriate **Job Family**.

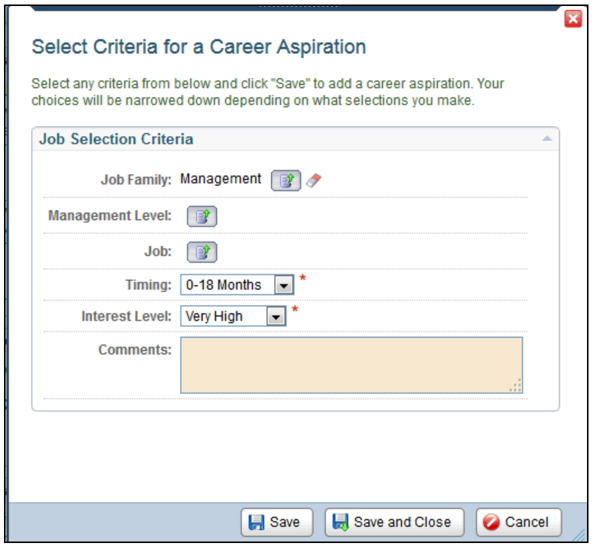
Step	Action
12.	Click the **OK** button. 



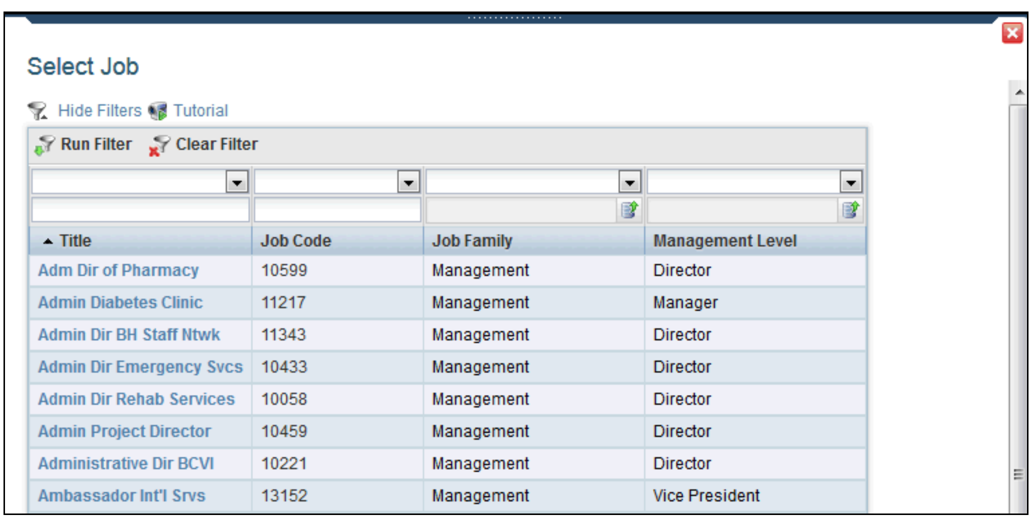
Step	Action
13.	Click the **Select** button to search and select a management level. 



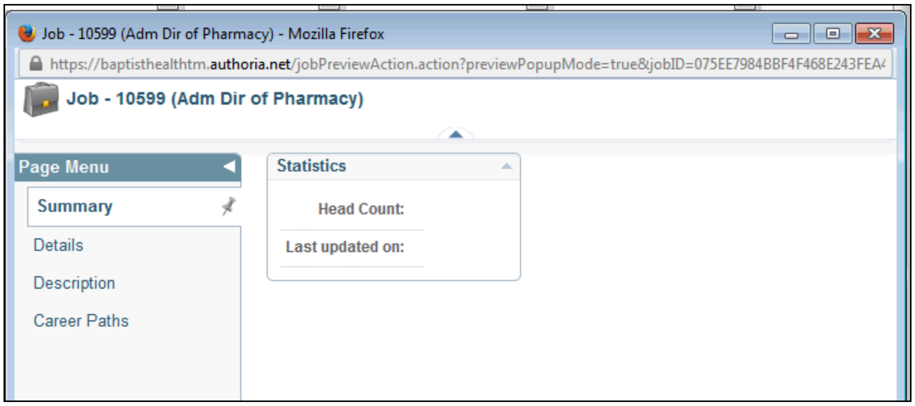
Step	Action
14.	These are the available management levels. In this example, you're not going to select a management level.
15.	Click the **Cancel** button. 



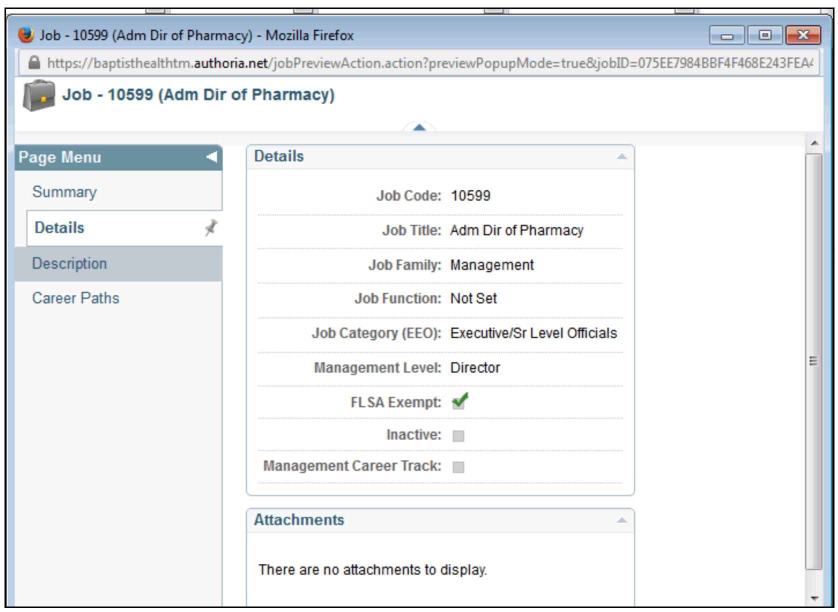
Step	Action
16.	Click the **Select** button to select a job. 



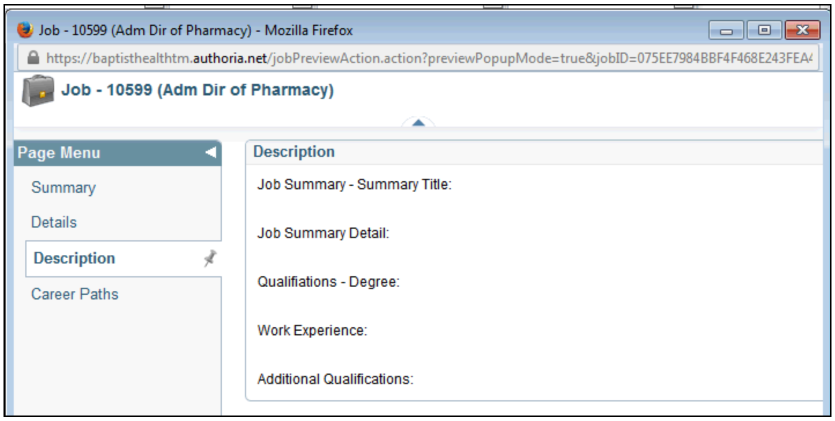
Step	Action
17.	Click the appropriate **Job Title** link. This will open information about the selected job in a new window.



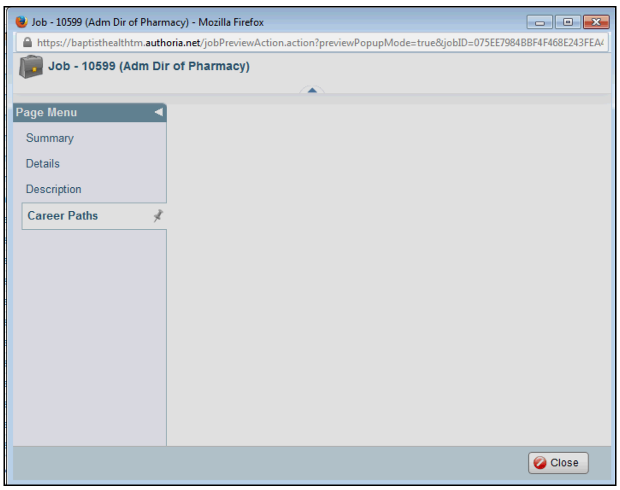
Step	Action
18.	Navigate the Page Menu to view more information about the selected job, including: a summary, details, description, and associated career paths.
19.	Click the **Details** link.

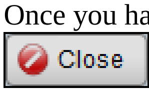


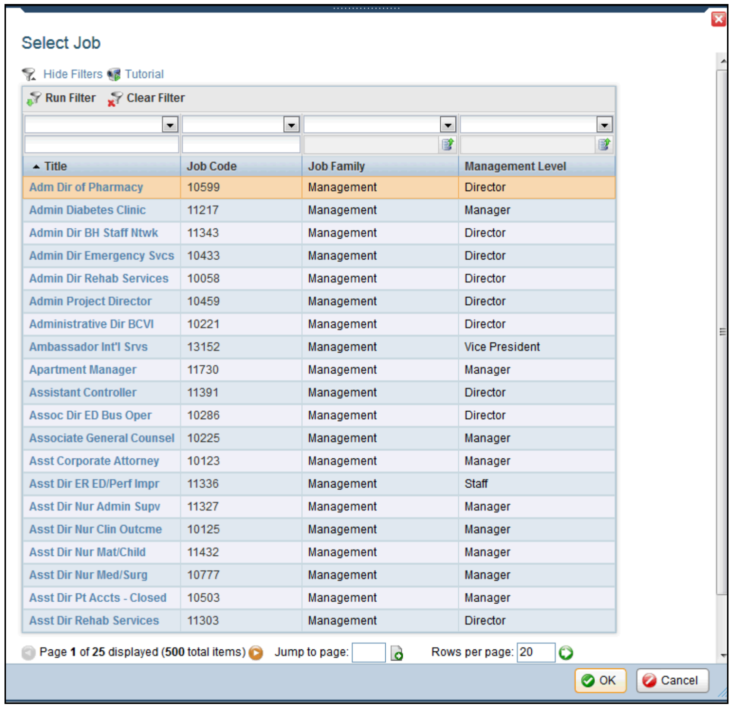
Step	Action
20.	Click the **Description** link.



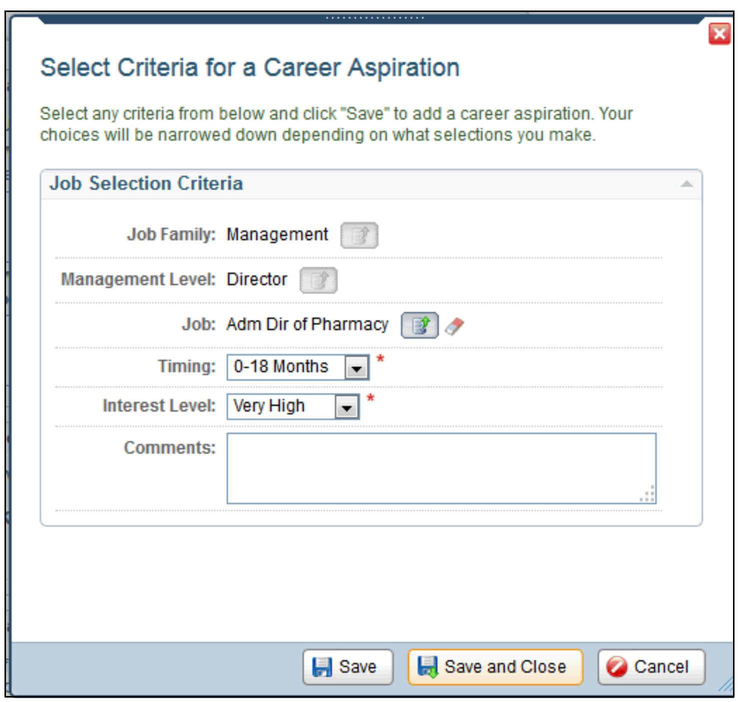
Step	Action
21.	Click the **Career Paths** link.

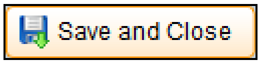


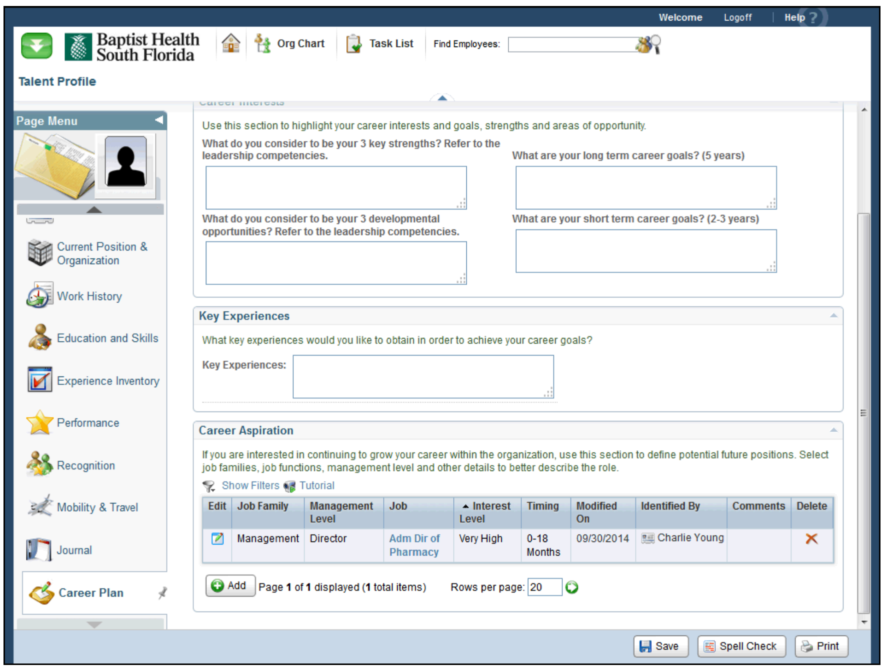
Step	Action
22.	Once you have reviewed the job information, click the **Close** button. 



Step	Action
23.	Click the appropriate **Job Code**.
24.	Click the **OK** button. 



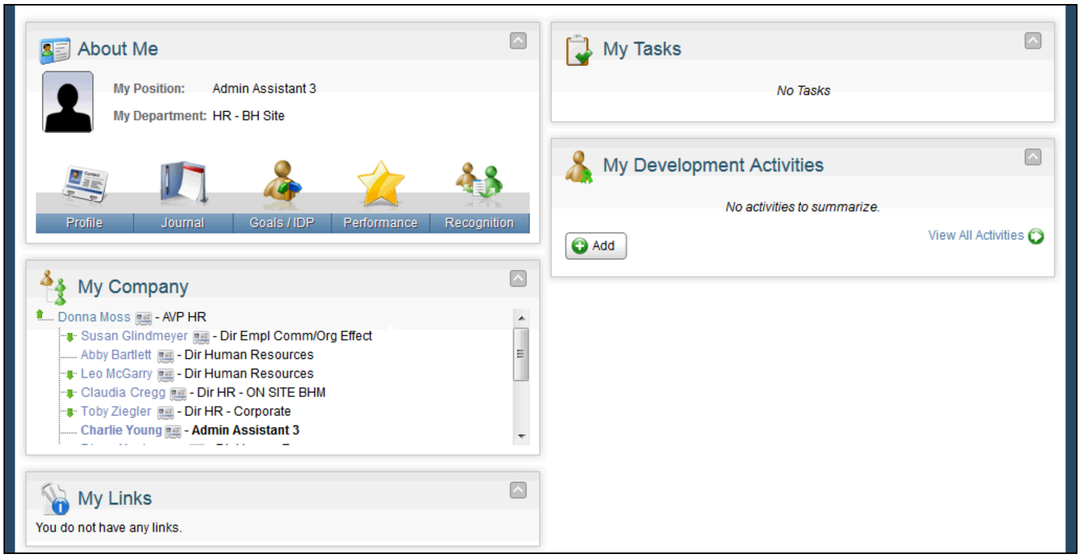
Step	Action
25.	In the timing field, select a time frame in which you want to achieve the selected career aspiration. In this example, you want to achieve your goal in 0-18 months. Use the Interest Level field to indicate your interest in achieving the selected career aspiration. In this example, you 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. 



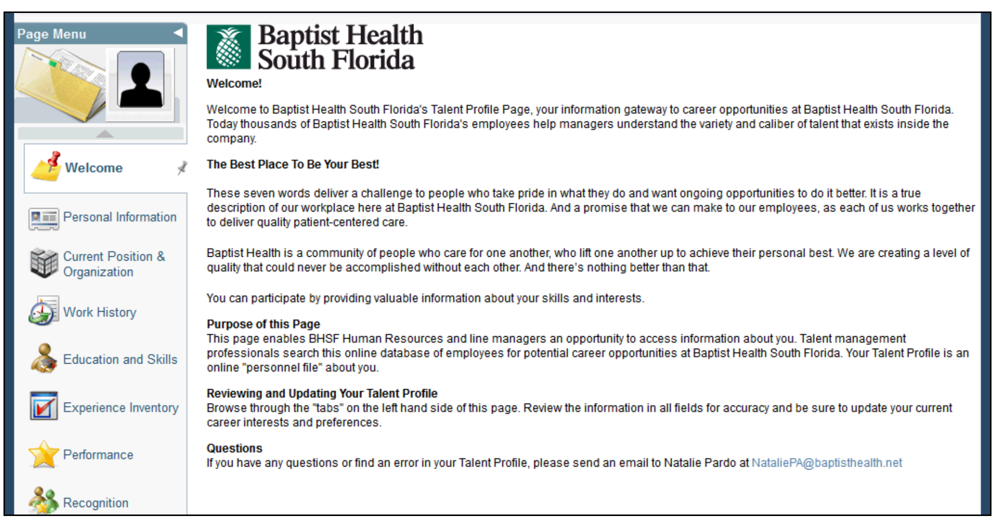
Step	Action
28.	You can view, edit, and delete your saved career aspiration here.
29.	Click the **Home** button. 
30.	**Congratulations.** You have used the Career Plan tools to navigate a career path and update your career aspirations. **End of Procedure.**

Reviewing and Sending Recognition Information in Your Talent Profile

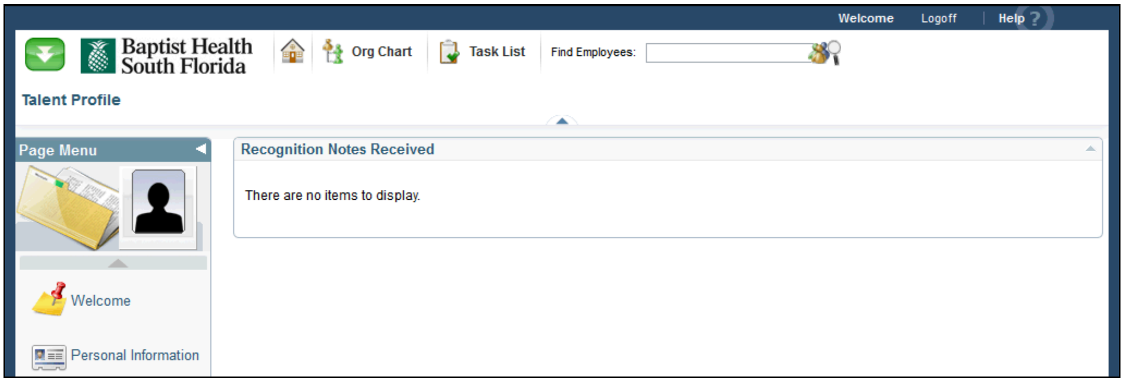
Purpose: Use this transaction to practice reviewing information and sending recognition notes in your Talent Profile.



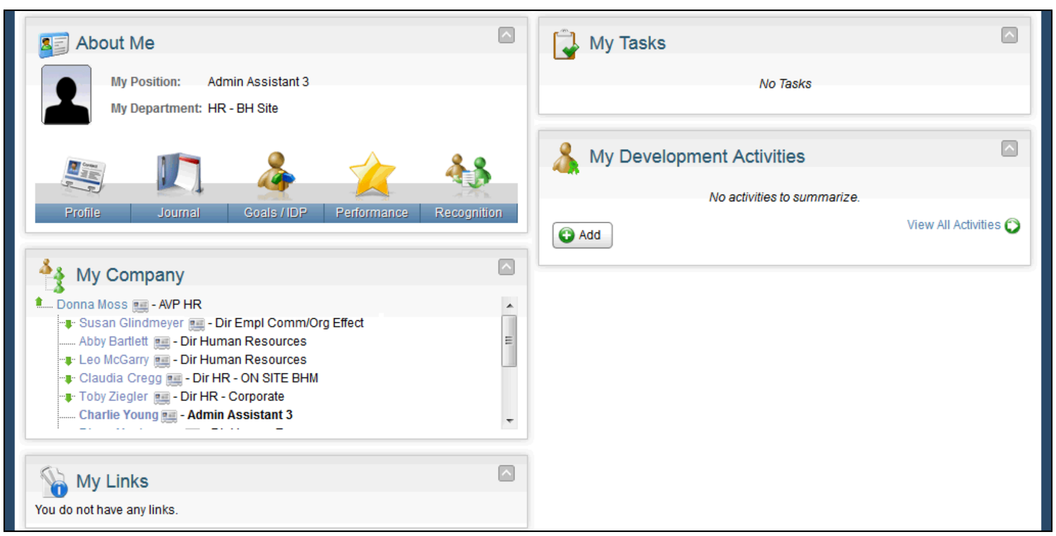
Step	Action
1.	In this example, you will both review a recognition note and send one to another employee. To begin, you will review a note.
2.	Click the **Profile** tab.



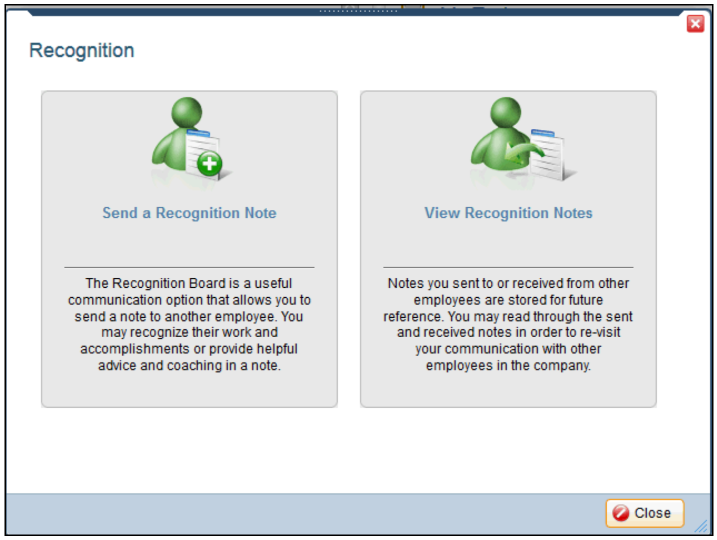
Step	Action
3.	Click the **Recognition** link.



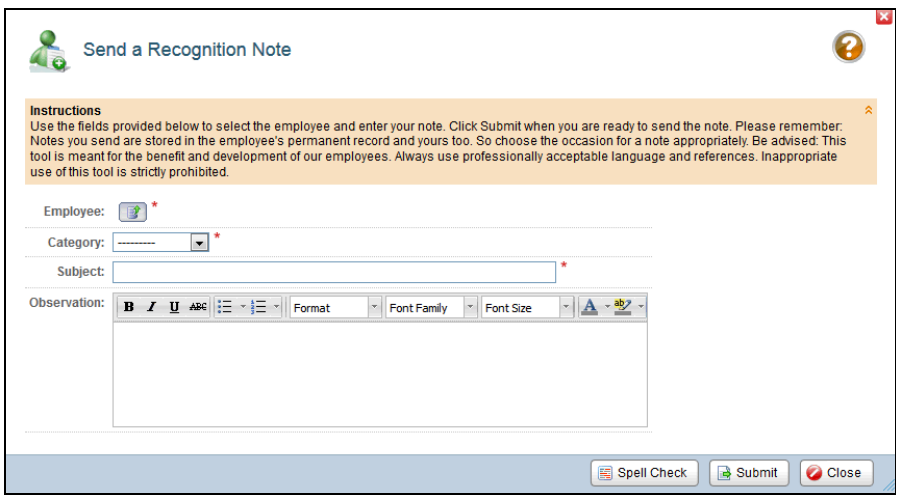
Step	Action
4.	Use this page to review recognition notes others have sent regarding you. In this example, this employee does not have any recent recognition notes.
5.	Click the **Home** button. 



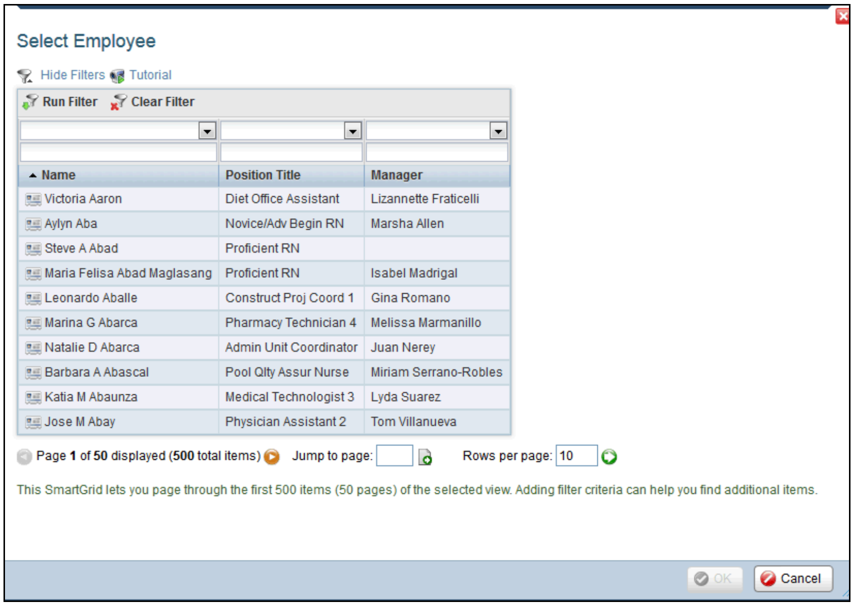
Step	Action
6.	Click the **Recognition** tab.
7.	Here you can select to send a recognition note or view recognition notes you have sent and/or received from others. In this example, you will send a recognition note.



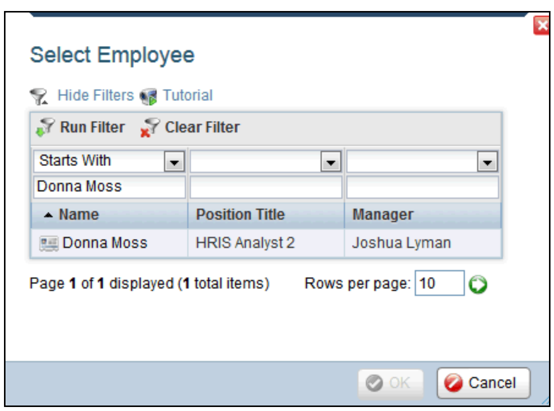
Step	Action
8.	Click the **Send a Recognition Note** link.



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. 

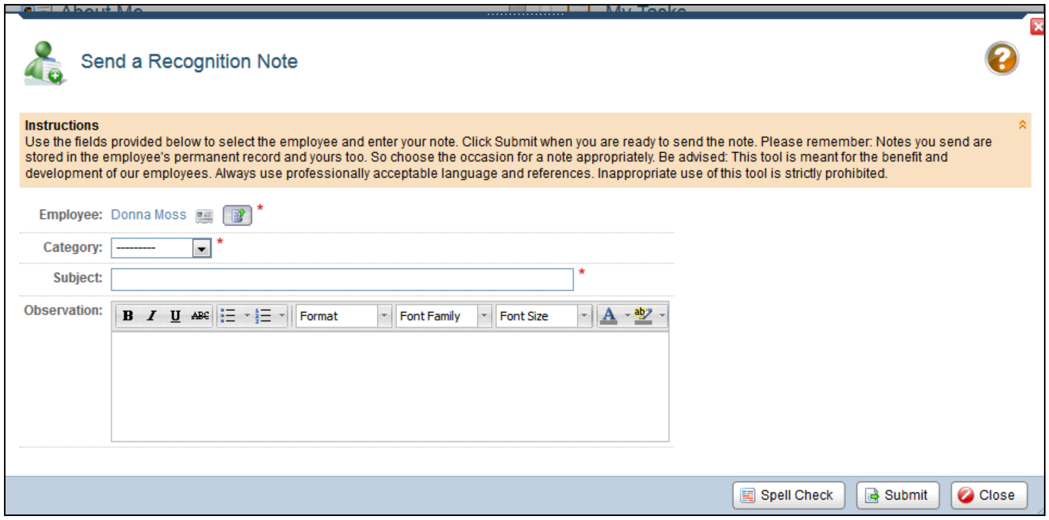


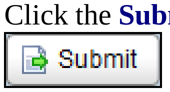
Step	Action
11.	To search for an employee, you can search by Name, Position Title, or Manager. In this example, you will search by Name.
12.	Click the button to the right of the **Filter Name** field.
13.	Click the appropriate **Filter Name** list item.
14.	Enter the desired information into the **Search Name** field.
15.	Click the **Run Filter** button. Run Filter

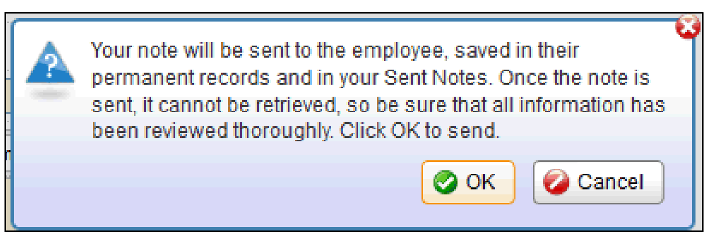


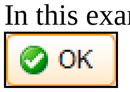
Step	Action
16.	Click the appropriate **Name**.

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. 



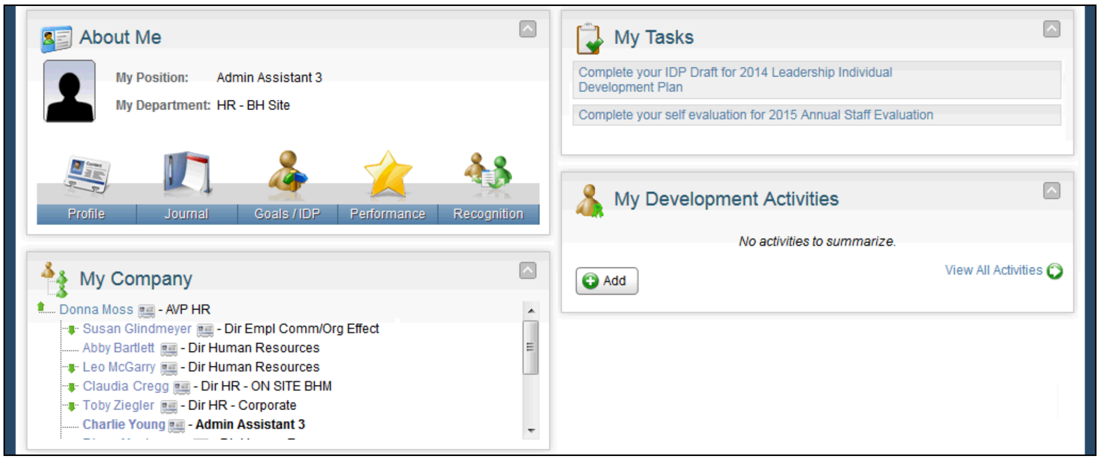
Step	Action
23.	Read the message. Click the Cancel button to return and edit the message. Click the OK button to submit the message. In this example, click the **OK** button. 

Step	Action
24.	**Congratulations.** You have reviewed recognition information and sent a recognition note. **End of Procedure.**

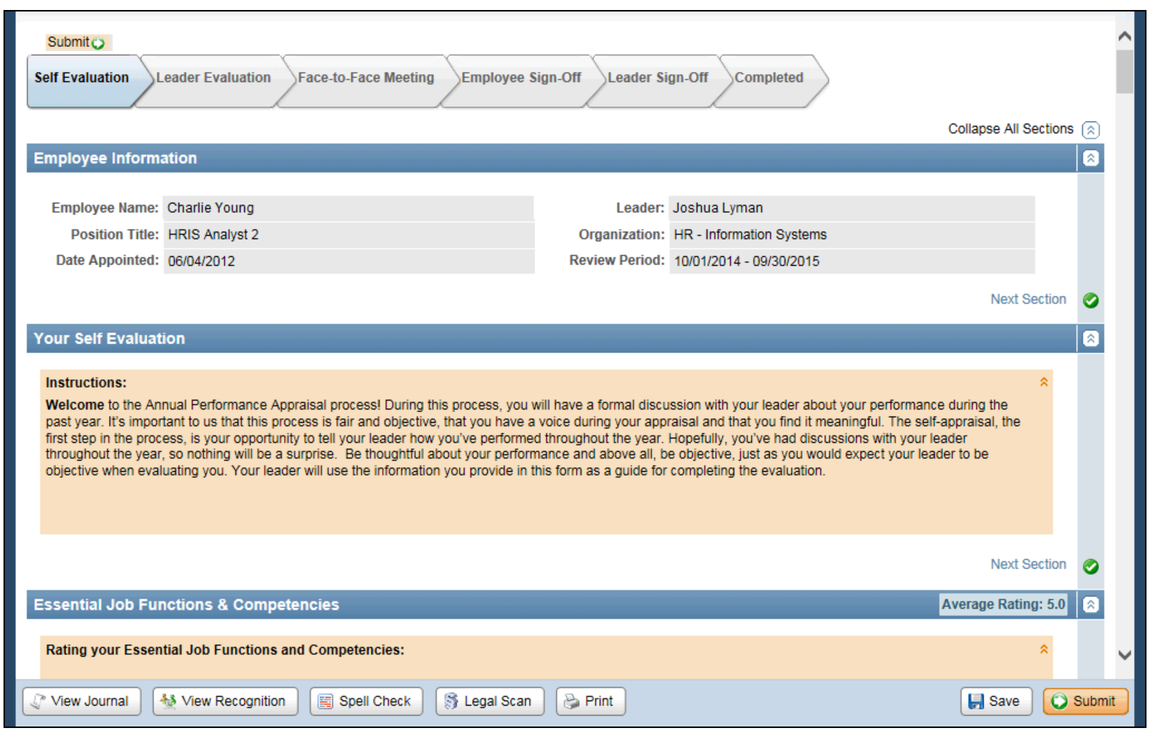
Managing Performance Management

Completing a Self Evaluation

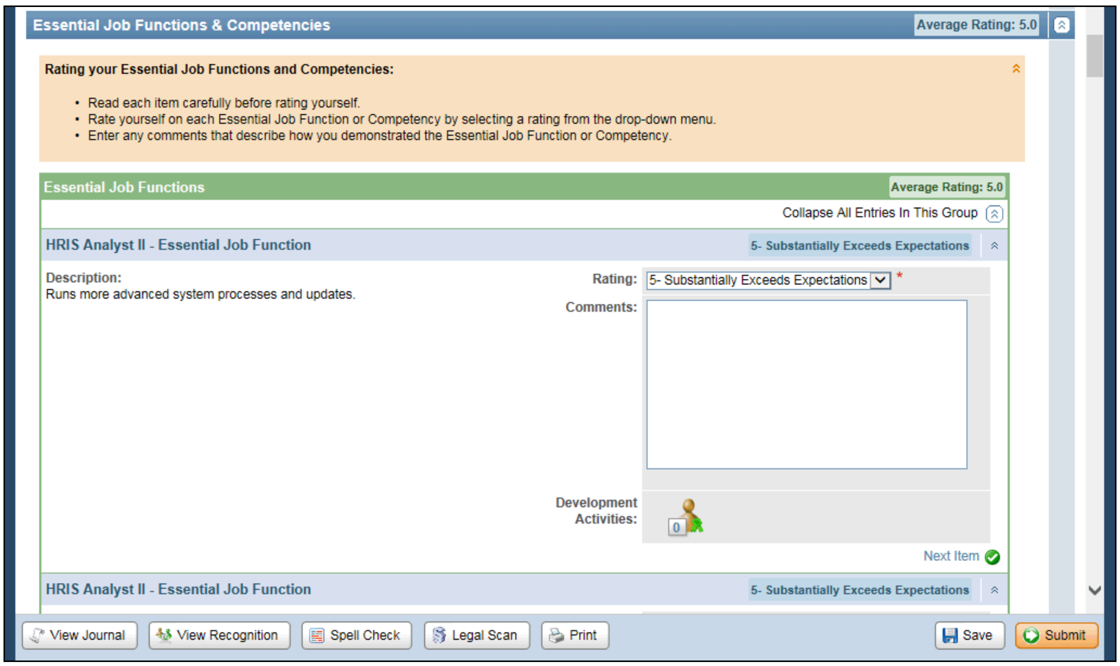
Purpose: Use this transaction to practice completing a self evaluation.



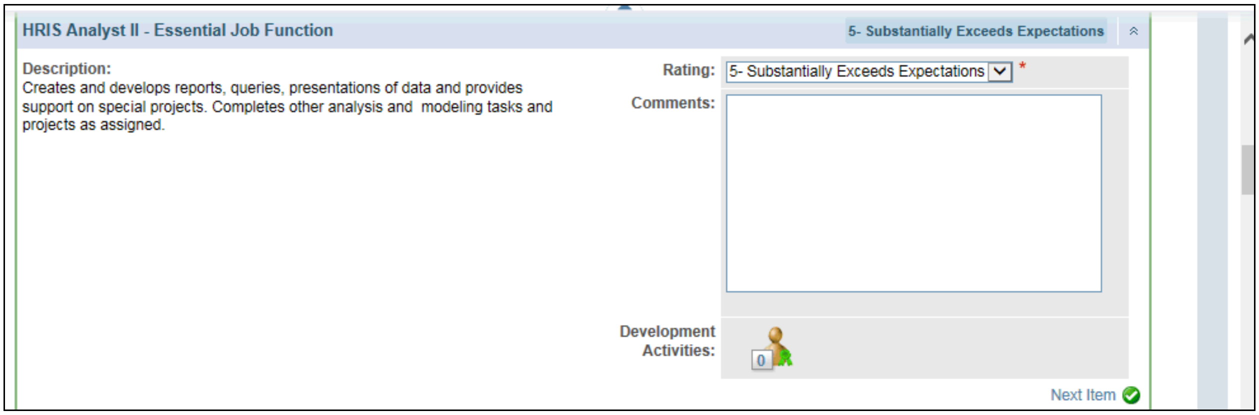
Step	Action
1.	Click the **Complete your self evaluation for 2015 Annual Staff Evaluation** link.



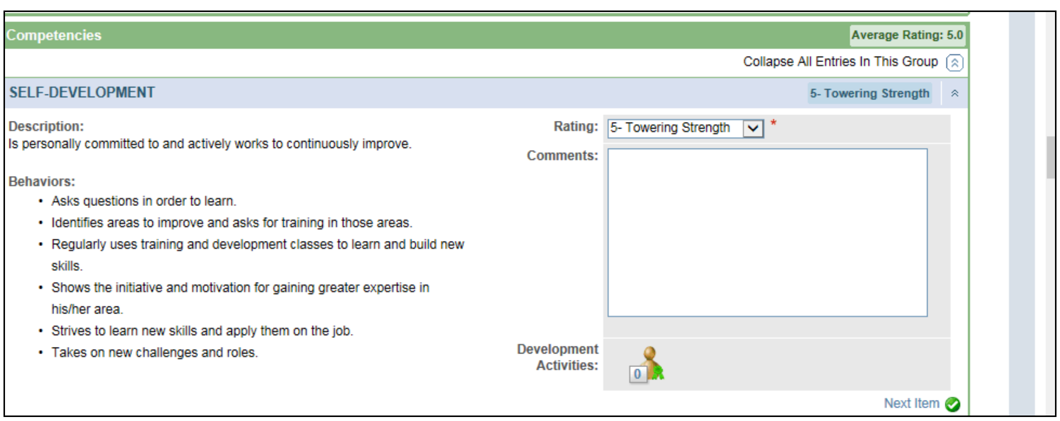
Step	Action
2.	Use the Self Evaluation page to rate yourself on essential job functions and competencies. Be thoughtful on your ratings, and be objective. Once you have completed the self evaluation, your leader will evaluate you. To view all steps of the process, and where your evaluation is in the 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.

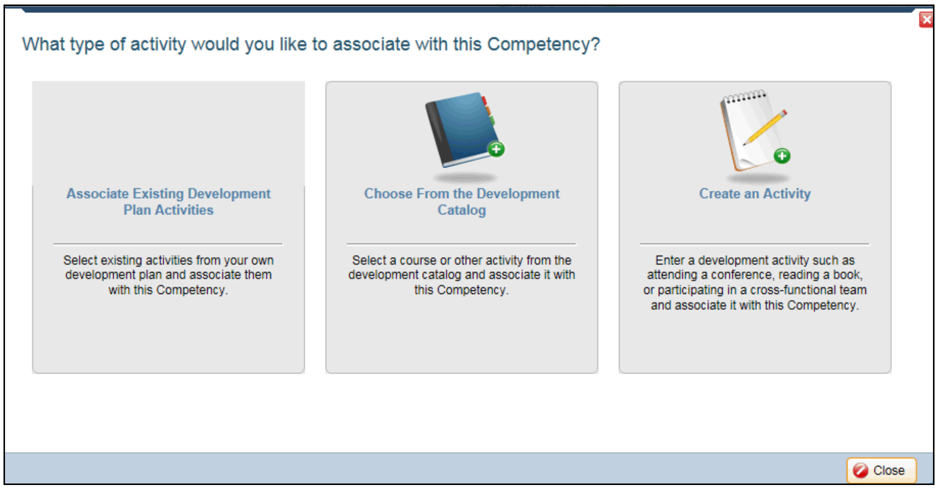


Step	Action
8.	Click the button to the right of the **Rating** field. 
9.	Select the appropriate **Rating** list item.
10.	Enter the desired information into the **Comments** field.
11.	Be sure to scroll down and rate all Essential Job Functions before rating your job Competencies. In this example, the remaining Essential Job Function ratings have been entered for you.
12.	Scroll down the page.

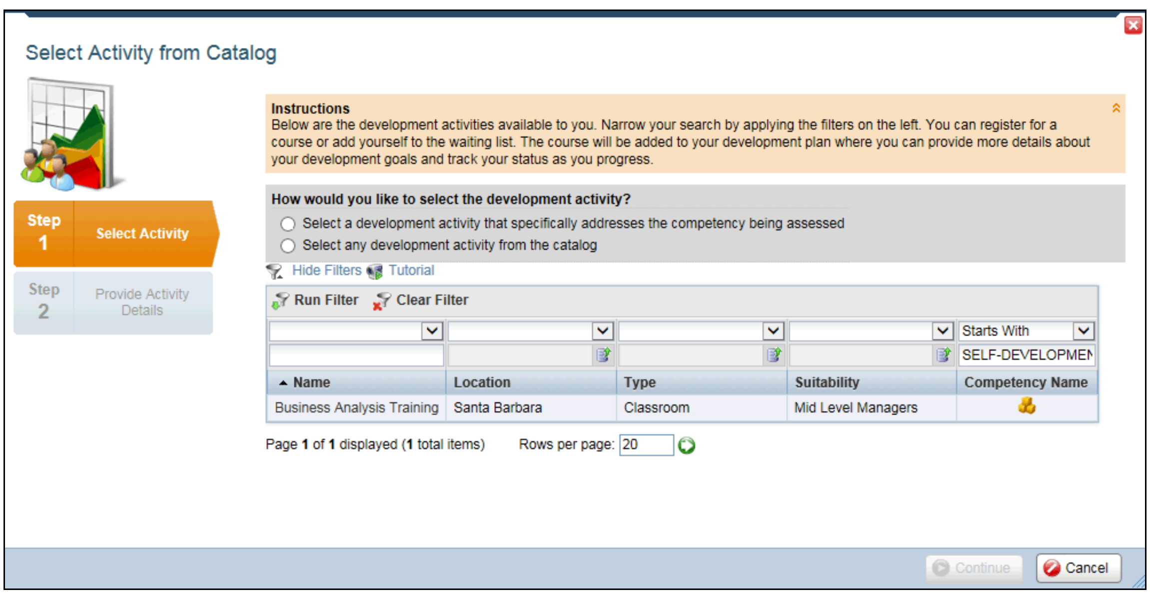


Step	Action
13.	Click the button to the right of the **Rating** field. 
14.	Select the appropriate **Rating** list item.

Step	Action
15.	To add a development activity associated with a competency, click the **Development Activities** button. 

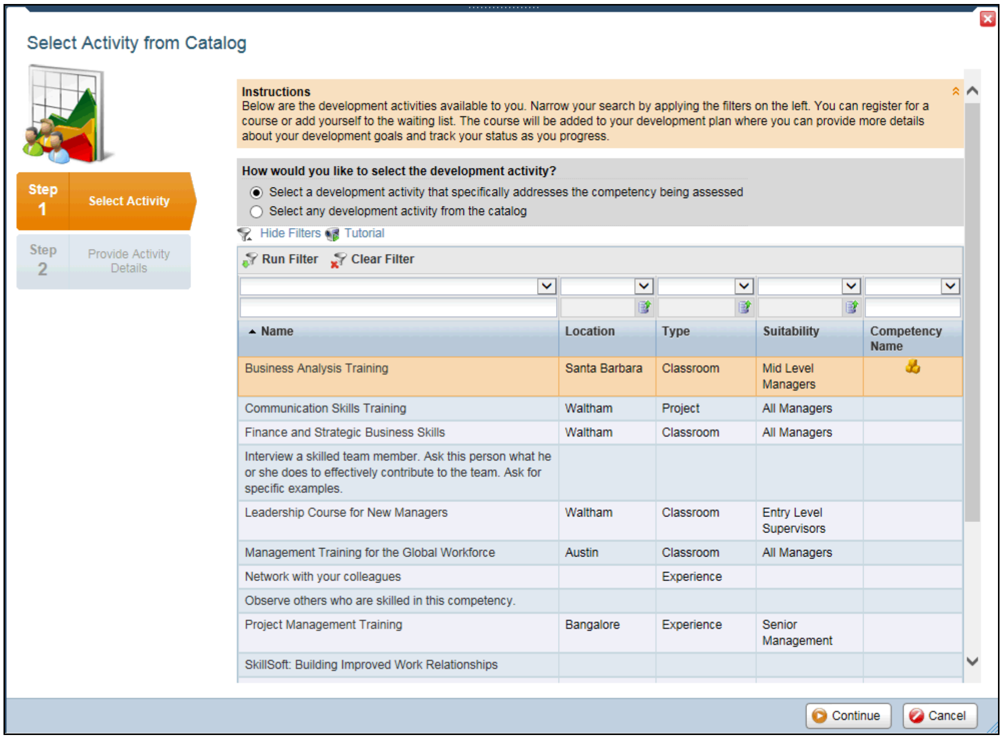


Step	Action
16.	Click the **Choose From the Development Catalog** link.

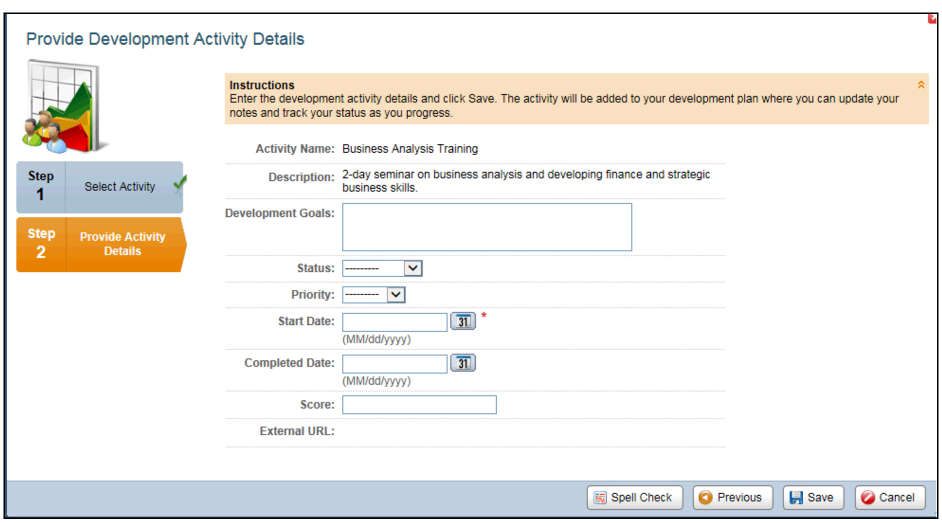


Step	Action
17.	Click the **Select a development activity that specifically addresses the competency being assessed** option. 

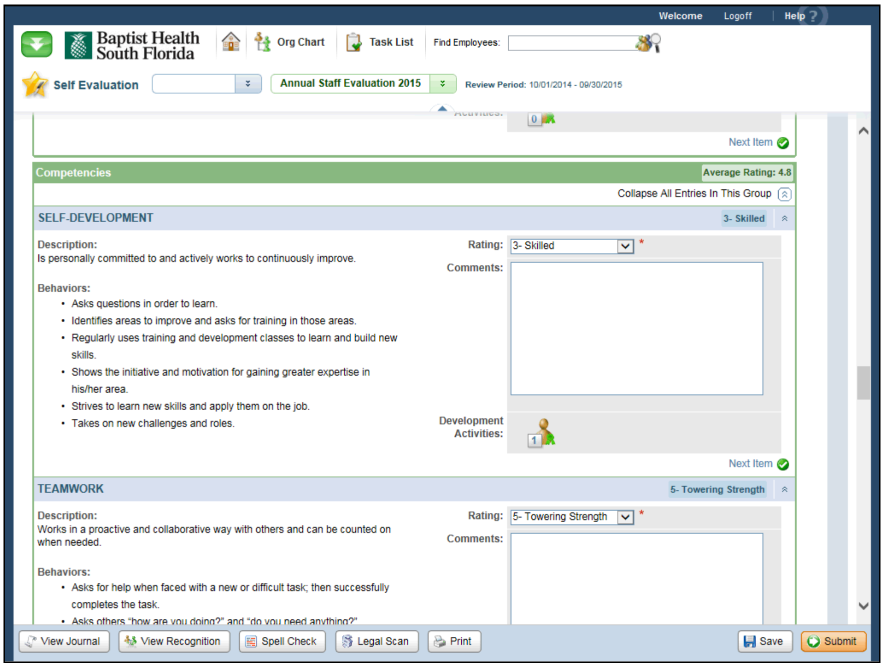
Step	Action
18.	Click the **Run Filter** button. Run Filter



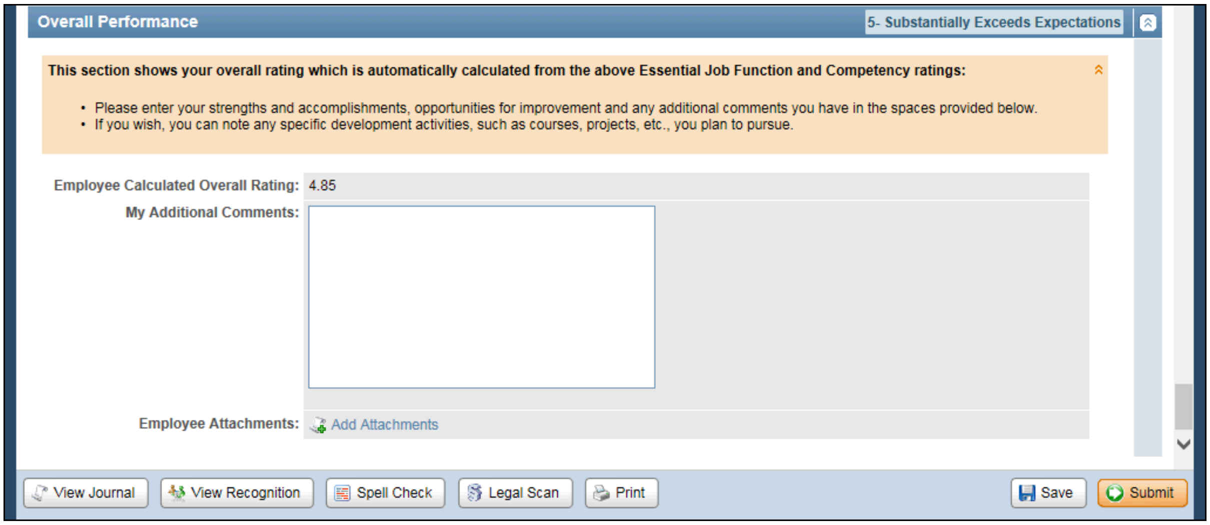
Step	Action
19.	Click the appropriate **Development Activity** Name.
20.	Click the **Continue** button. Continue



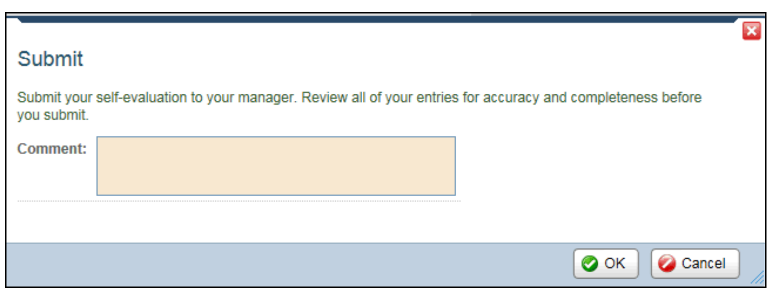
Step	Action
21.	Use the Activity Details page to enter additional information regarding the activity including development goals and a start date.
22.	Enter the desired information into the **Start Date** field.
23.	Click the **Save** button. 
24.	Notice, the Development Activities button now shows 1.

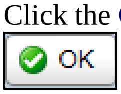


Step	Action
25.	Scroll down the page.
26.	Next, be sure to rate all Competencies on your self evaluation. Some sample competencies include: Teamwork, Customer Service, and Action Oriented. In this example, the remaining competency ratings have been entered for you.



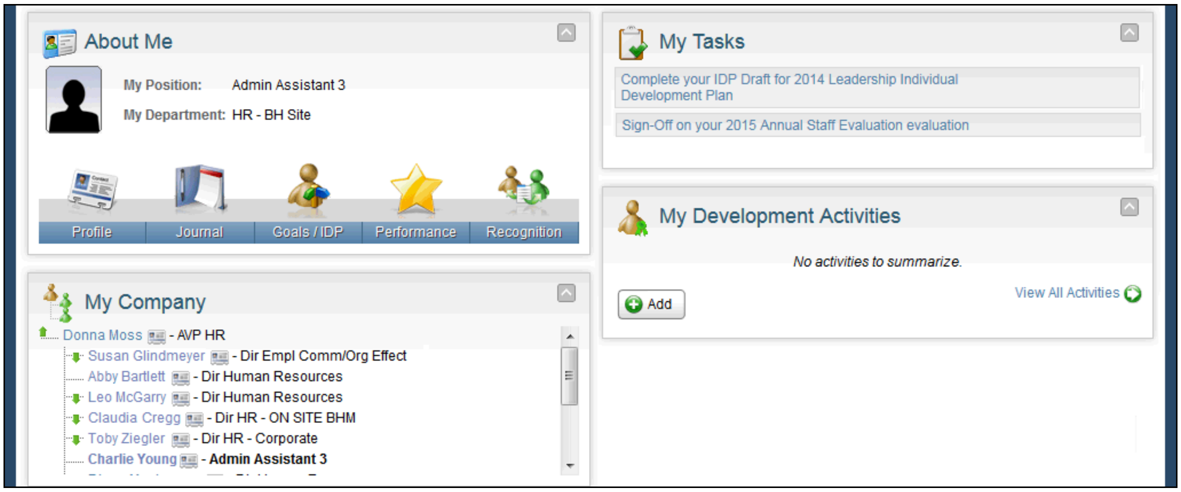
Step	Action
27.	The Overall Performance section shows your overall rating. This rating is automatically calculated from your Essential Job Function and Competency ratings. Each category is equally weighted at 50%. In this example, your overall rating is 4.85.
28.	If you have provided high or low ratings 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. 



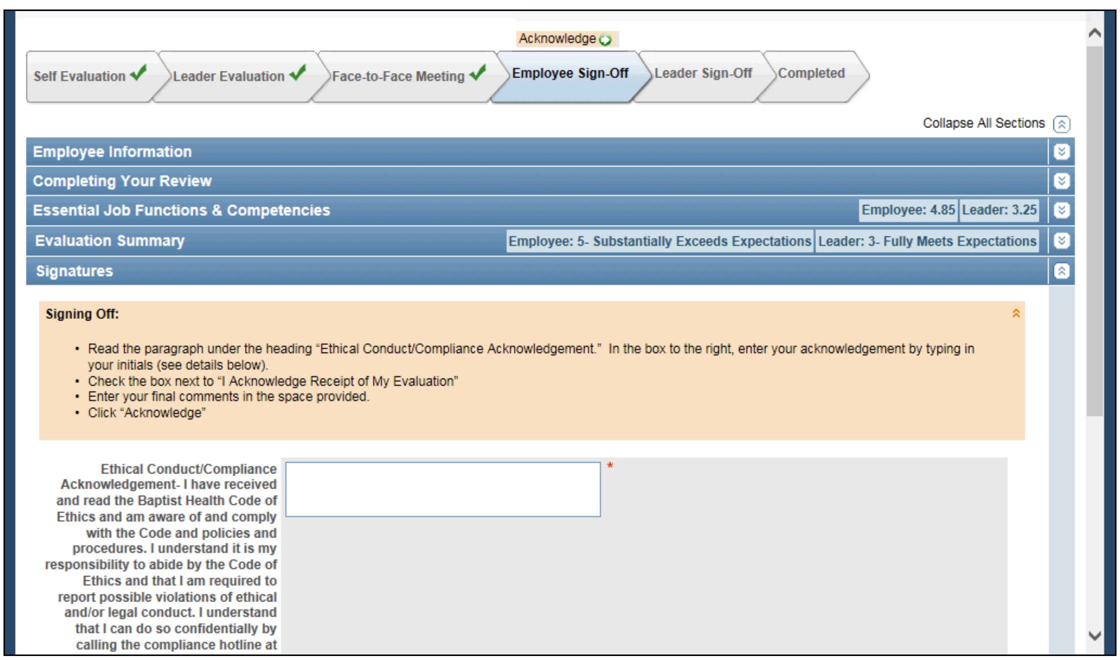
Step	Action
30.	Enter the desired information into the **Comment** field.
31.	Click the **OK** button. 
32.	**Congratulations.** You have completed a self evaluation. **End of Procedure.**

Signing Your Evaluation

Purpose: Use this transaction to practice signing-off on your self evaluation.

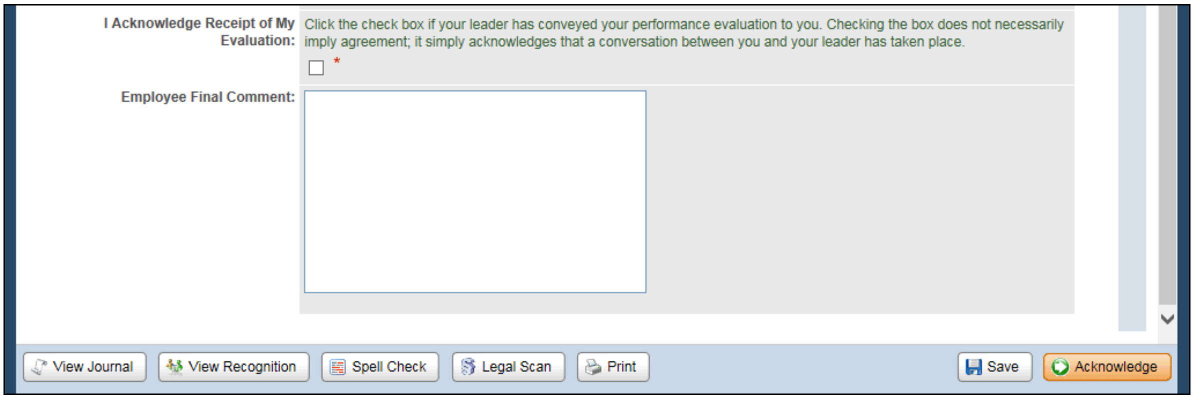


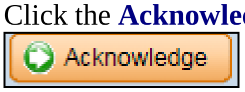
Step	Action
1.	Click the **Sign-Off on your 2015 Annual Staff Evaluation evaluation** link.



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.

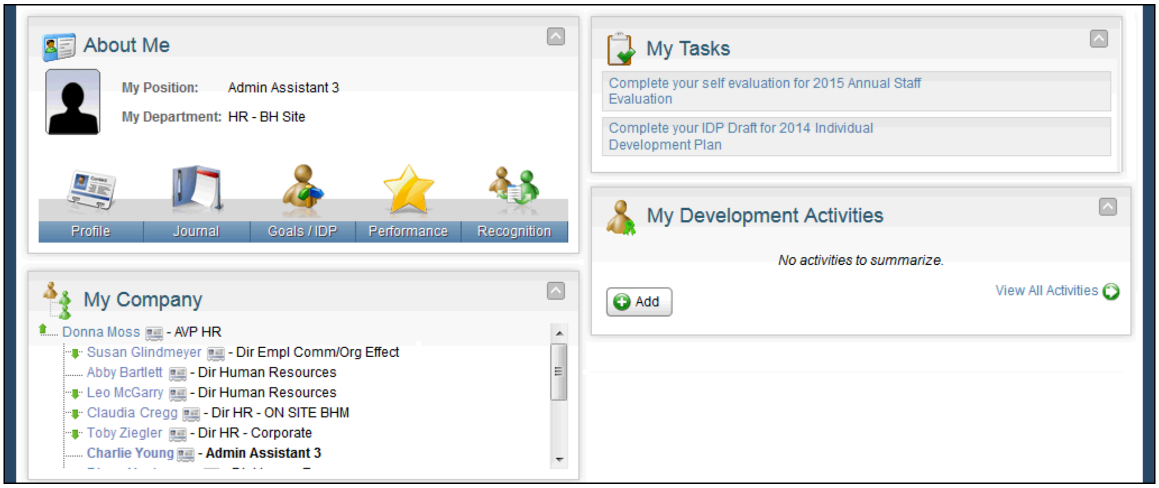


Step	Action
5.	Click the **I Acknowledge Receipt of My Evaluation** option.
6.	Use the Employee Final Comment field to enter any last comments you feel necessary to add. In this example, there are no final comments to enter.
7.	Click the **Acknowledge** button. 
8.	After an employee has signed and submitted 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.**

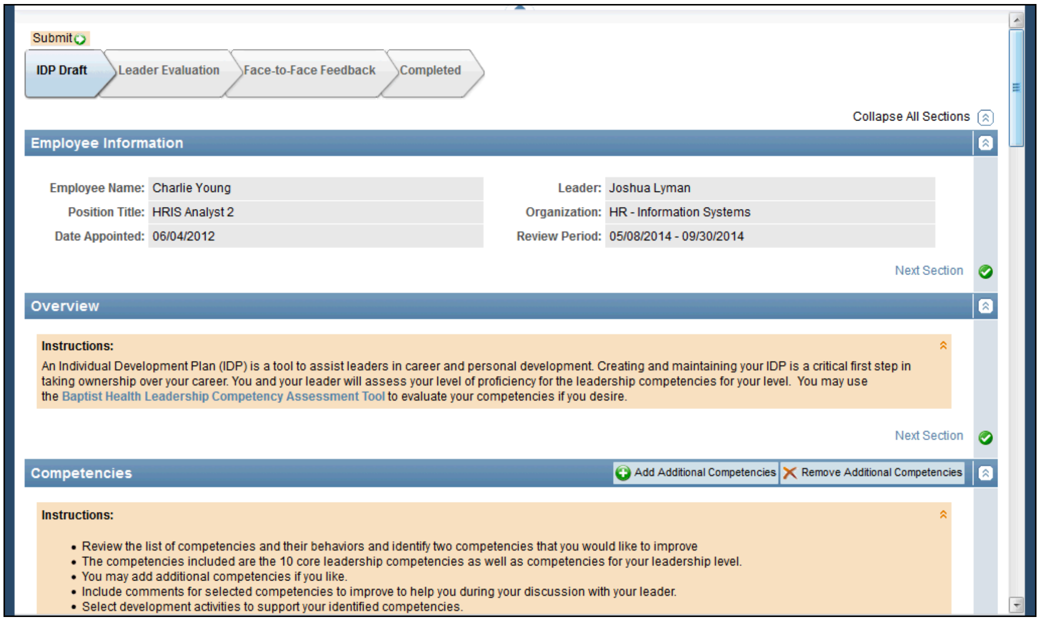
Managing Individual Development Plans

Managing Your Individual Development Plan

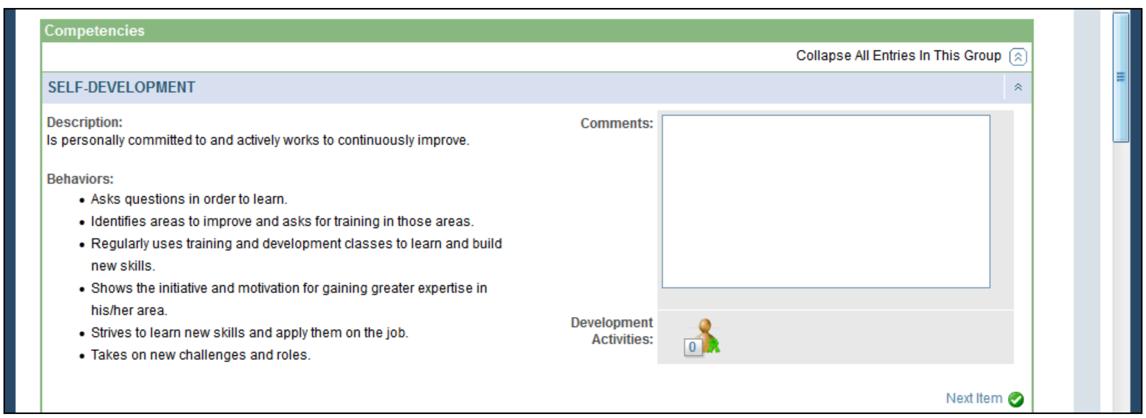
Purpose: Use this transaction to practice managing your individual development plan.



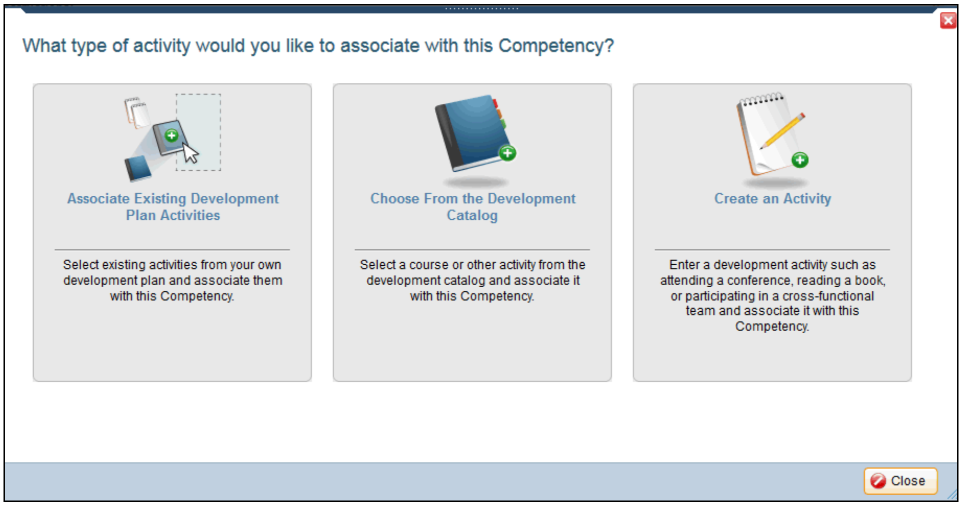
Step	Action
1.	Click the appropriate **My Tasks** link. Complete your IDP Draft for 2014 Individual Development Plan
2.	An Individual Development Plan is a tool to assist leaders in career and personal development. To complete your IDP, review the list of competencies and their behaviors. Then identify 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. Include comments for selected competencies to help you during your discussion with your leader. Finally, select development activities to support your identified competencies.



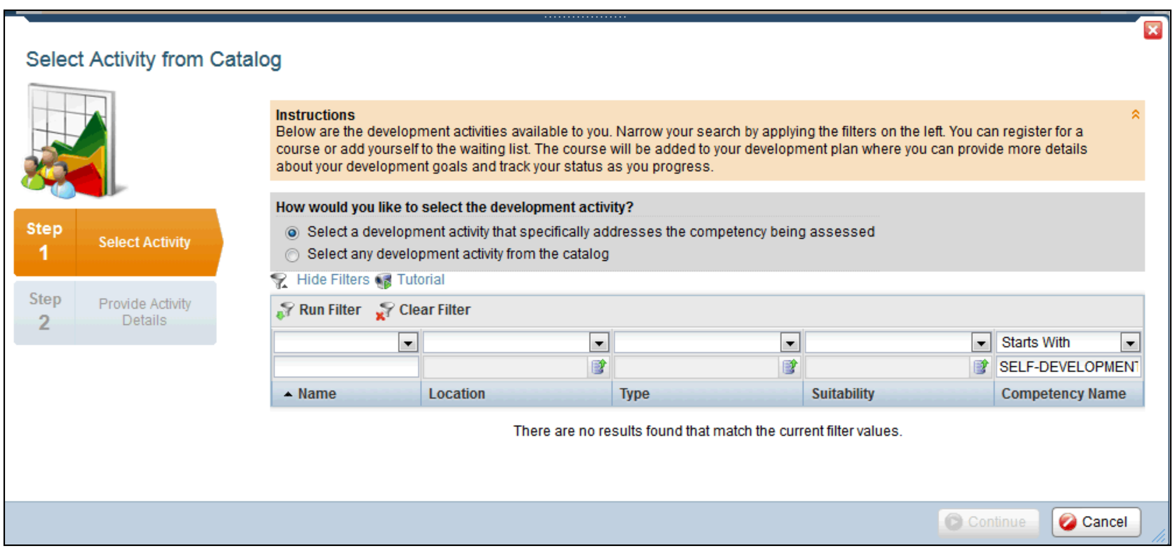
Step	Action
3.	Scroll down the page.

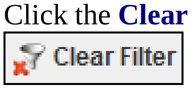


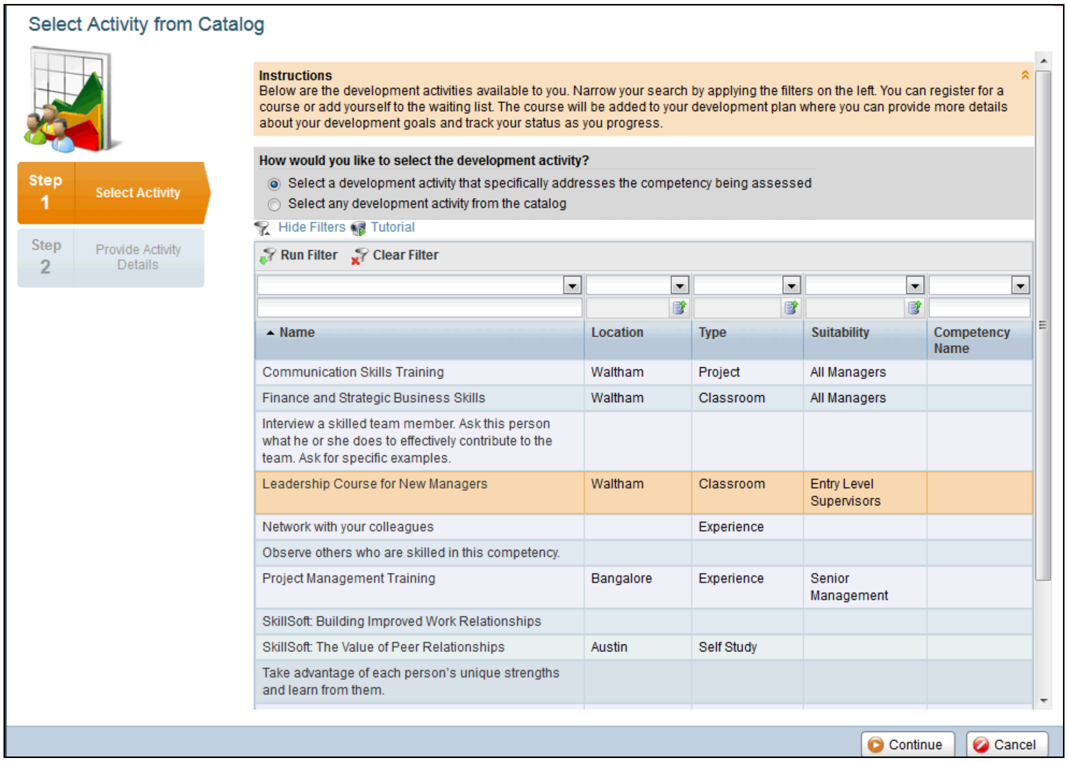
Step	Action
4.	Click the **Development Activities** button to add an activity to this competency. 



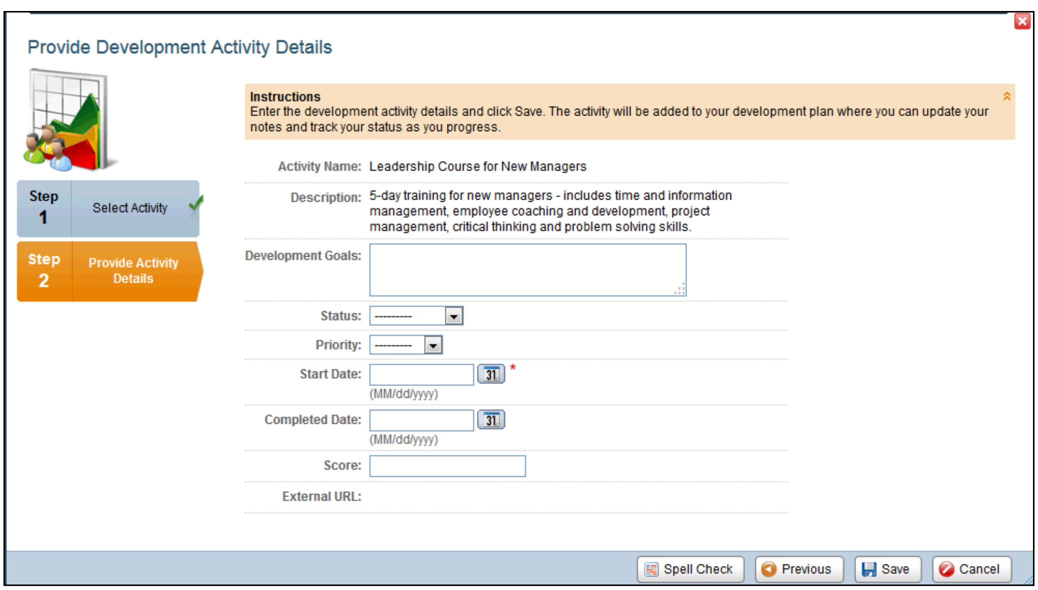
Step	Action
5.	You have three types of activities you can associate with this competency. You can associate an existing activity, choose an activity from the catalog, or create a new activity.
6.	Click the appropriate **Activity** link.



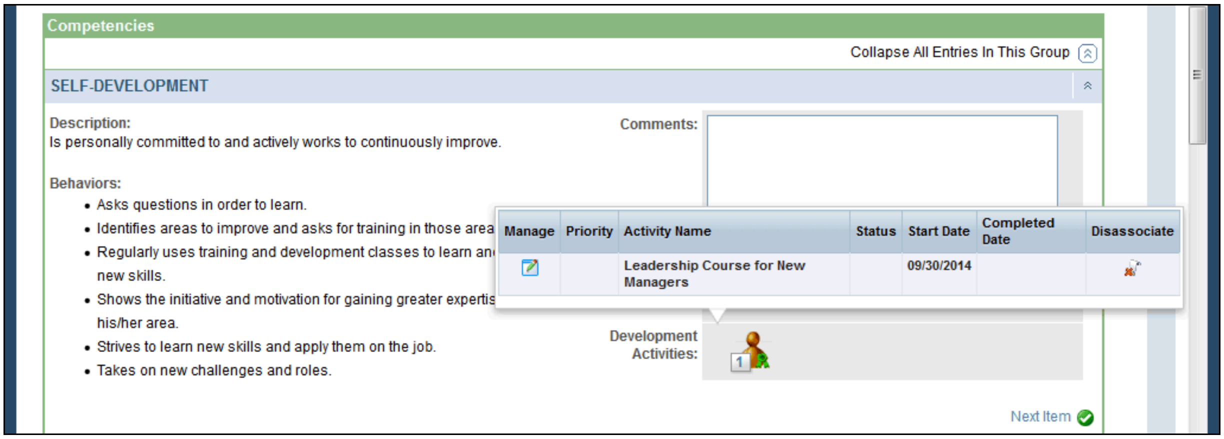
Step	Action
7.	Use this page to search the catalog for the appropriate development activity.
8.	In this example, there are no search results with the current filter. Click the **Clear Filter** button. 



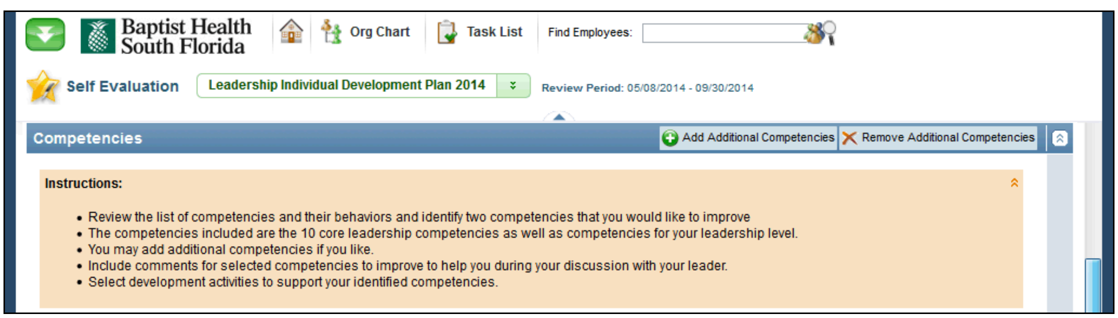
Step	Action
9.	Click the appropriate activity **Name**.
10.	Click the **Continue** button. Continue

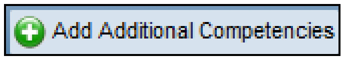


Step	Action
11.	Use this page to provide details about the development activity. This activity will be added to your development plan where you can update your notes and track your status as you progress.
12.	Enter the desired information into the **Start Date** field.
13.	Click the **Save** button. 

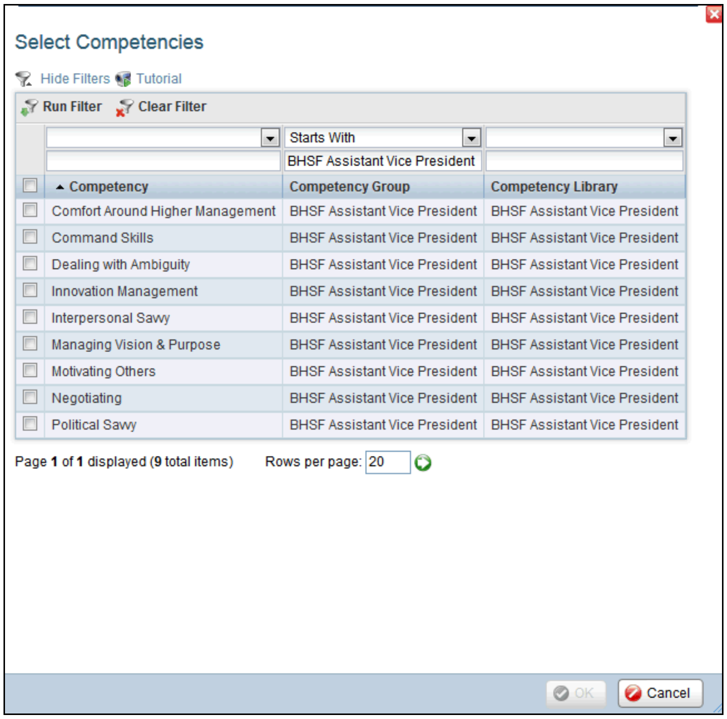


Step	Action
14.	Notice, the Development Activities icon now shows the number one, meaning there is one development activity associated with this competency. Hover over the icon to see more details regarding the activity.
15.	Hover over the **Development Activities** button.
16.	Scroll down the page.

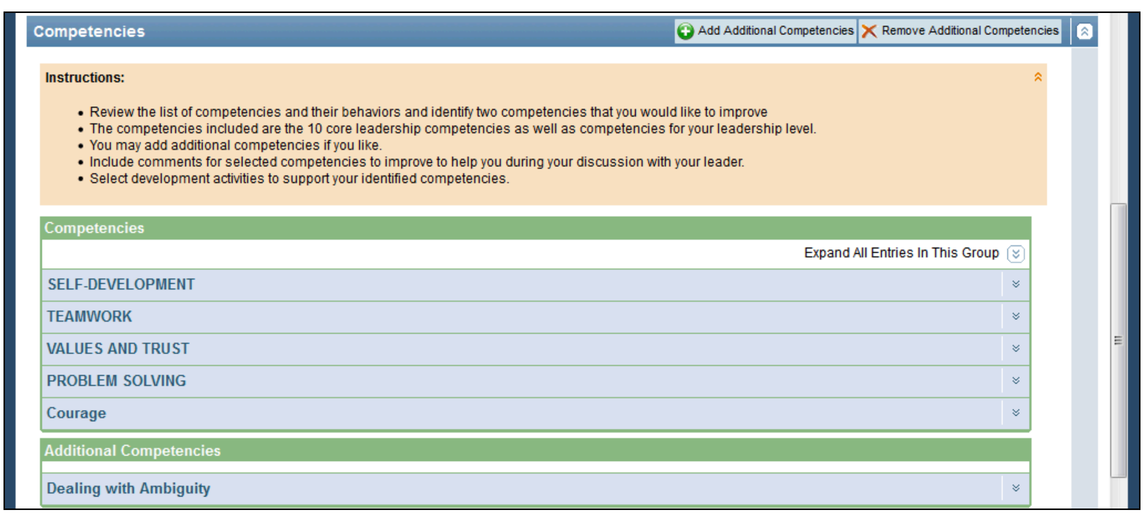


Step	Action
17.	You can add additional competencies not listed here. Click the **Add Additional Competencies** button. 

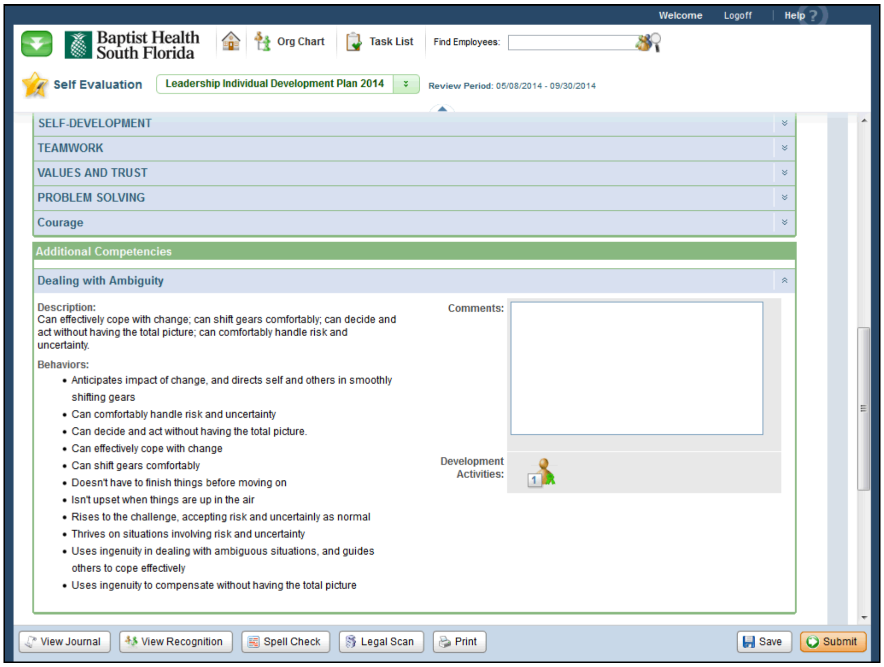
Step	Action
18.	Click the button to the right of the **Filter** field. 
19.	Click the appropriate **Filter** list item.
20.	Enter the desired information into the **Competency Group** field.
21.	Click the **Run Filter** button. 

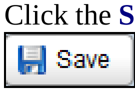


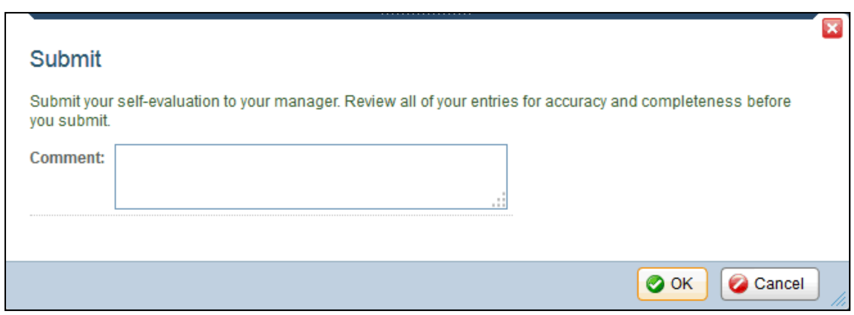
Step	Action
22.	To add a competency, click the radio button to the left of the appropriate **Competency** name. 
23.	Click the **OK** button. 

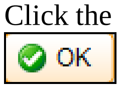


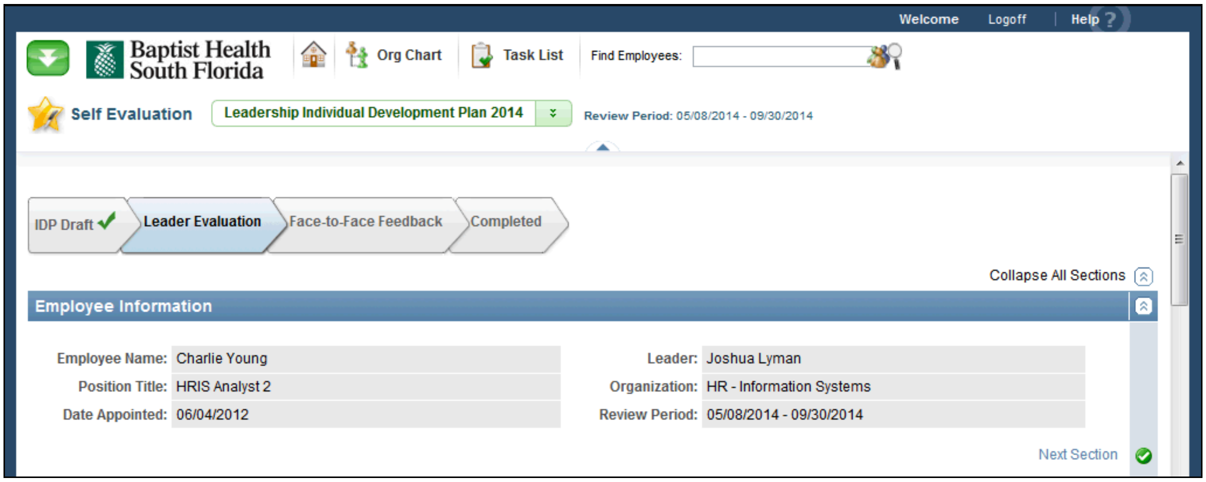
Step	Action
24.	Notice, under Additional Competencies, you can view the competency you added.
25.	Scroll down the page.



Step	Action
26.	Click the **Save** button. 
27.	Once you have finished adding comments and development activities, click the **Submit** button. 



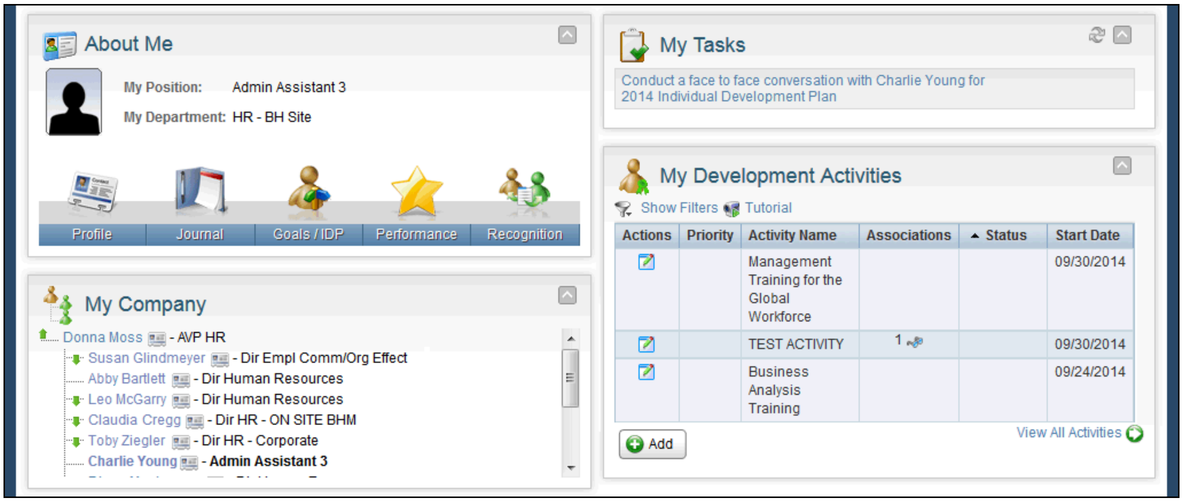
Step	Action
28.	Click the **OK** button. 



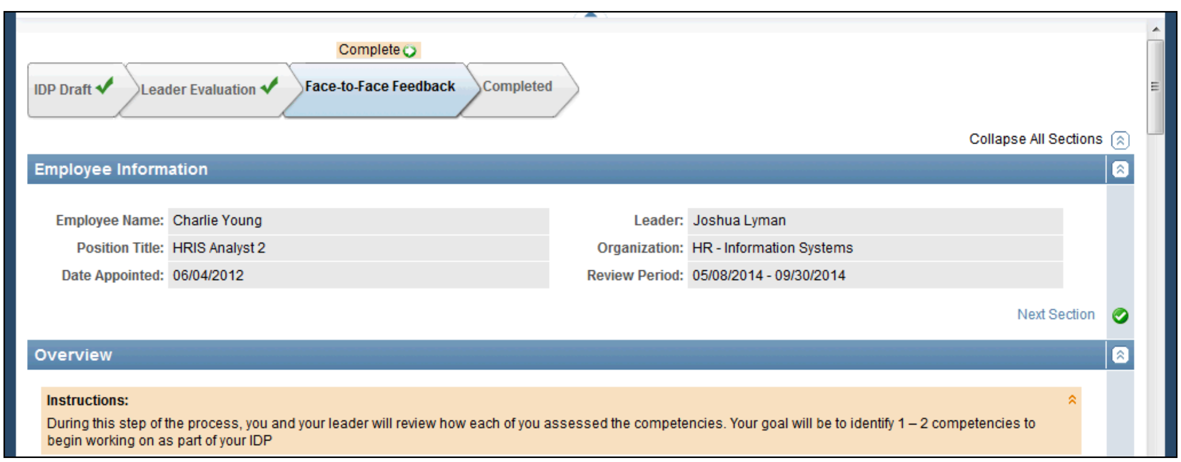
Step	Action
29.	Notice, you can view the progress of your IDP in the top left corner. Now that you have submitted a draft of your IDP, it will be reviewed by your leader.
30.	Click the **Home** button. 
31.	**Congratulations.** You have managed your Individual Development Plan. **End of Procedure.**

Reviewing and Completing an Individual Development Plan

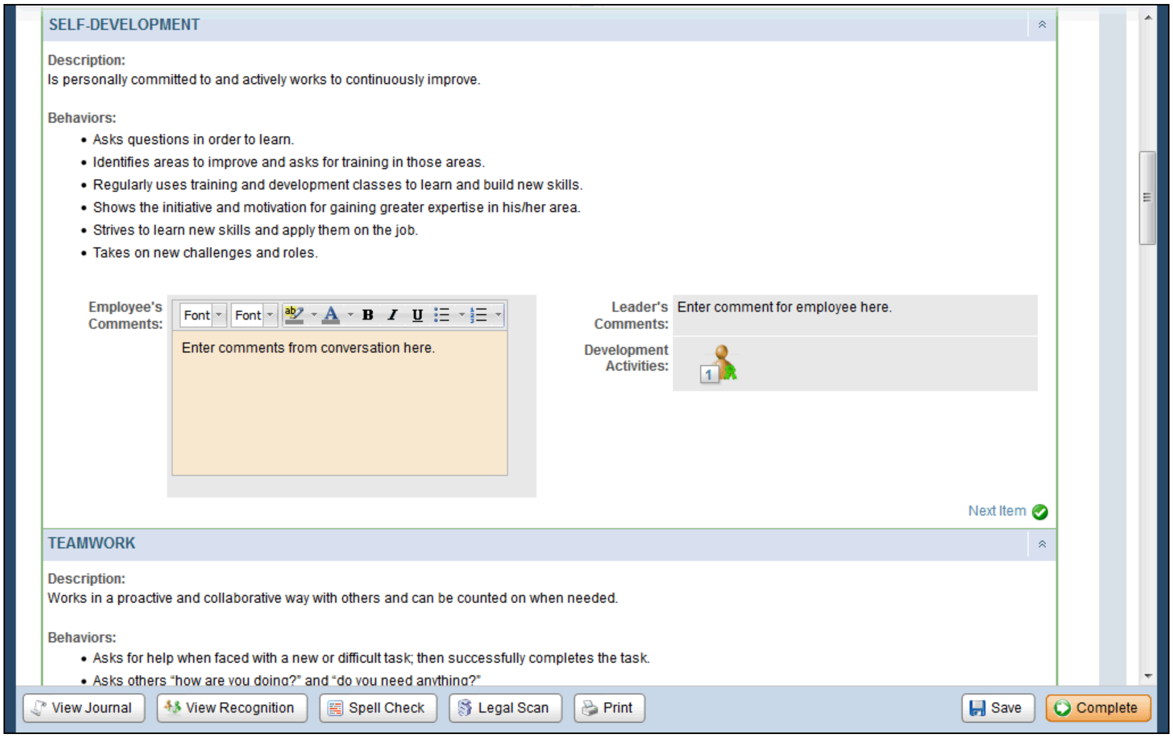
Purpose: Use this transaction to review and complete your Individual Development Plan.

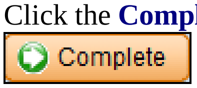


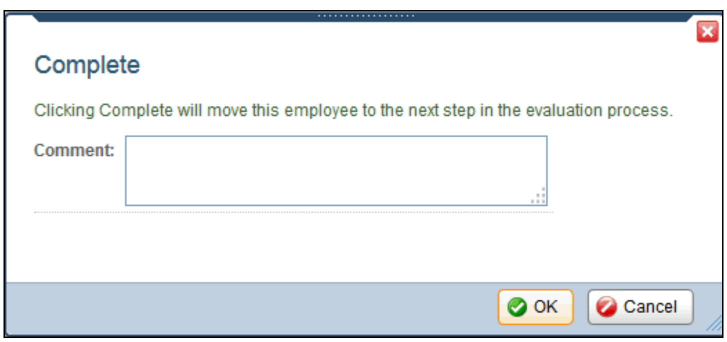
Step	Action
1.	At this point in the Individual Development Plan process, your leader has reviewed and possibly added comments, competencies, or activities. The next step is to have a face to face conversation with your manager to discuss your IDP before finalizing it.
2.	Click the **Conduct a face to face conversation with Charlie Young for 2014 Individual Development Plan** link.

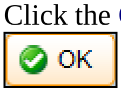


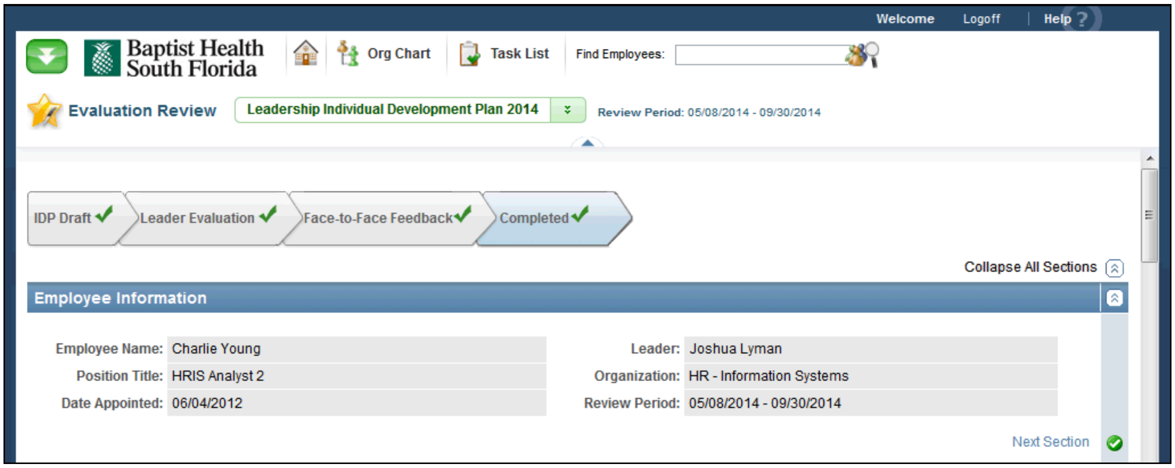
Step	Action
3.	Scroll down the page.



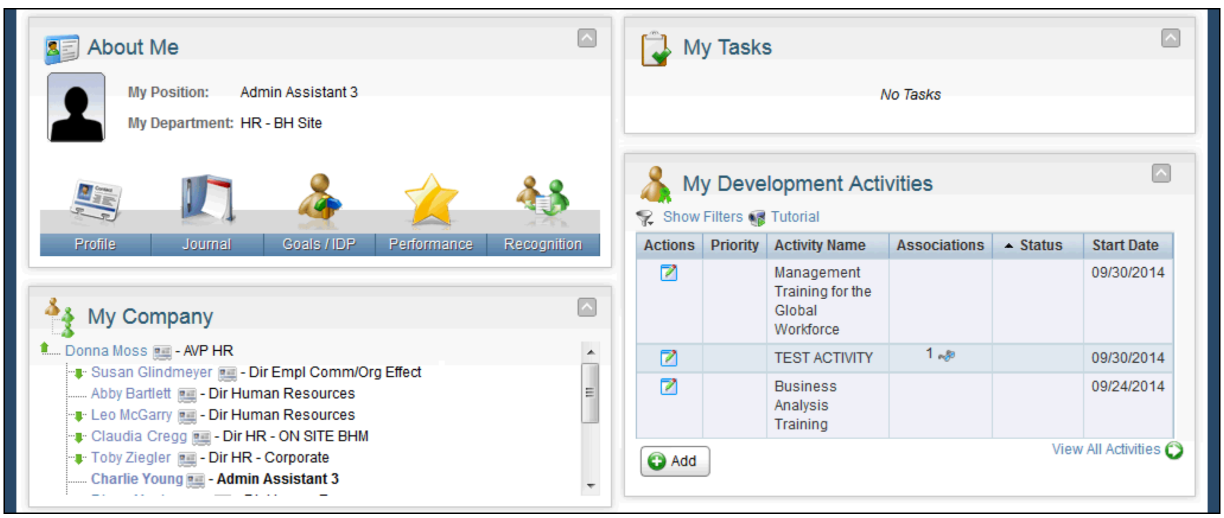
Step	Action
4.	You can view your leader's comments in the Leader's Comments field.
5.	Click in the **Employee's Comments** field.
6.	Enter comments from your conversation into the **Employee's Comments** field.
7.	Click the **Complete** button. 



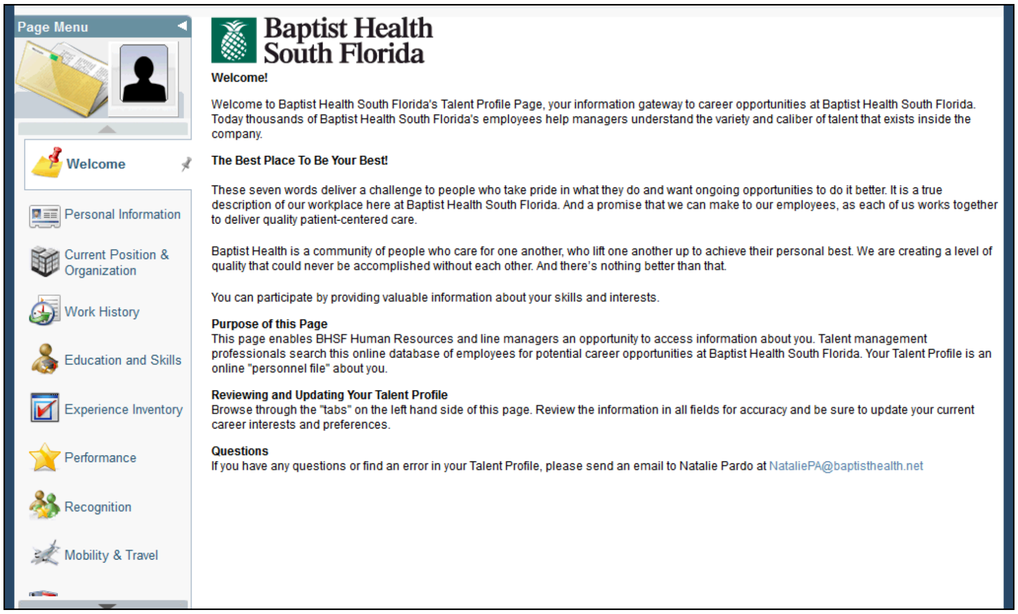
Step	Action
8.	Click the **OK** button to complete your IDP. 



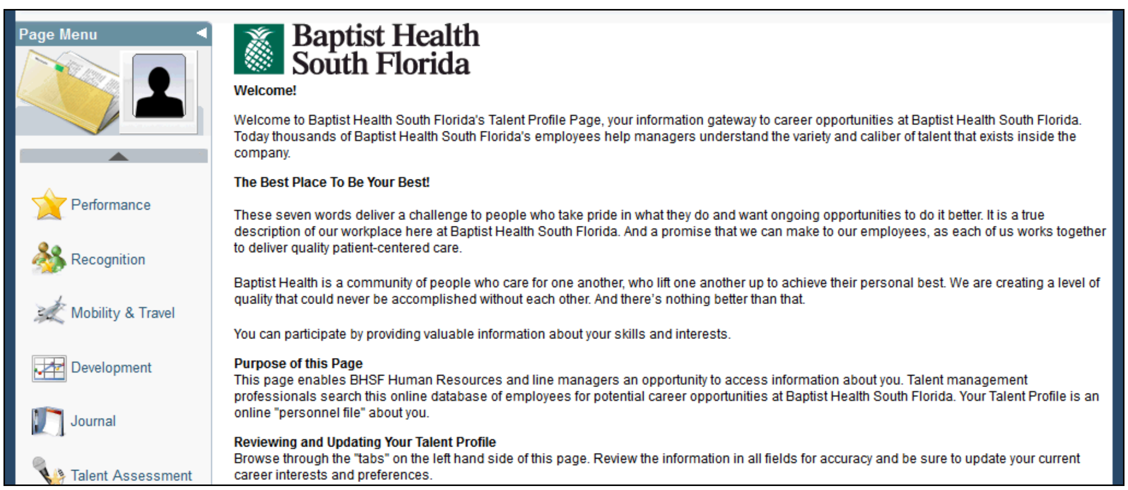
Step	Action
9.	Click the **Home** button. 



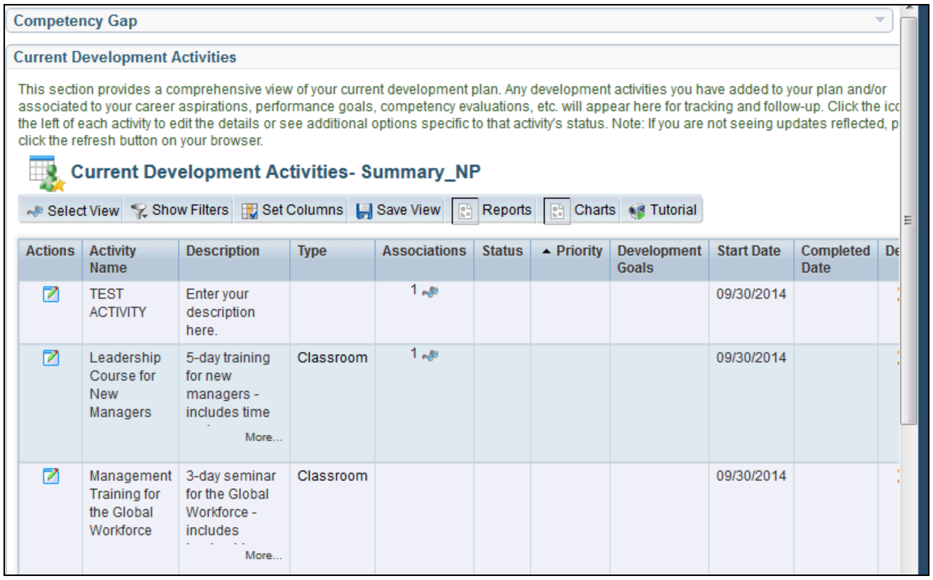
Step	Action
10.	Now that you have completed your IDP, you can begin your development activities identified in the IDP. Next, you will select an activity and edit the activity details.
11.	Click the **Profile** tab.



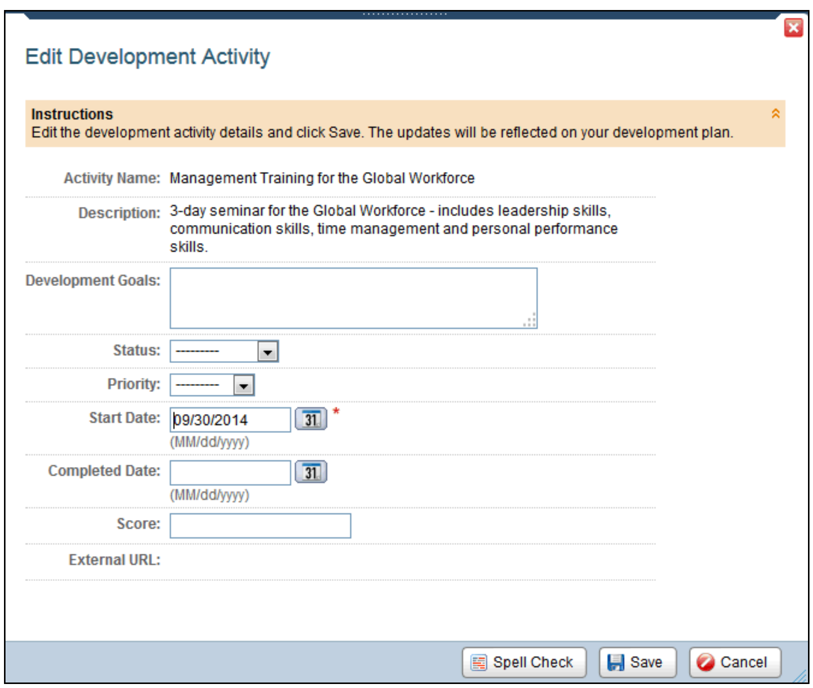
Step	Action
12.	Click the **Down Arrow** button. 



Step	Action
13.	Click the **Development** link.

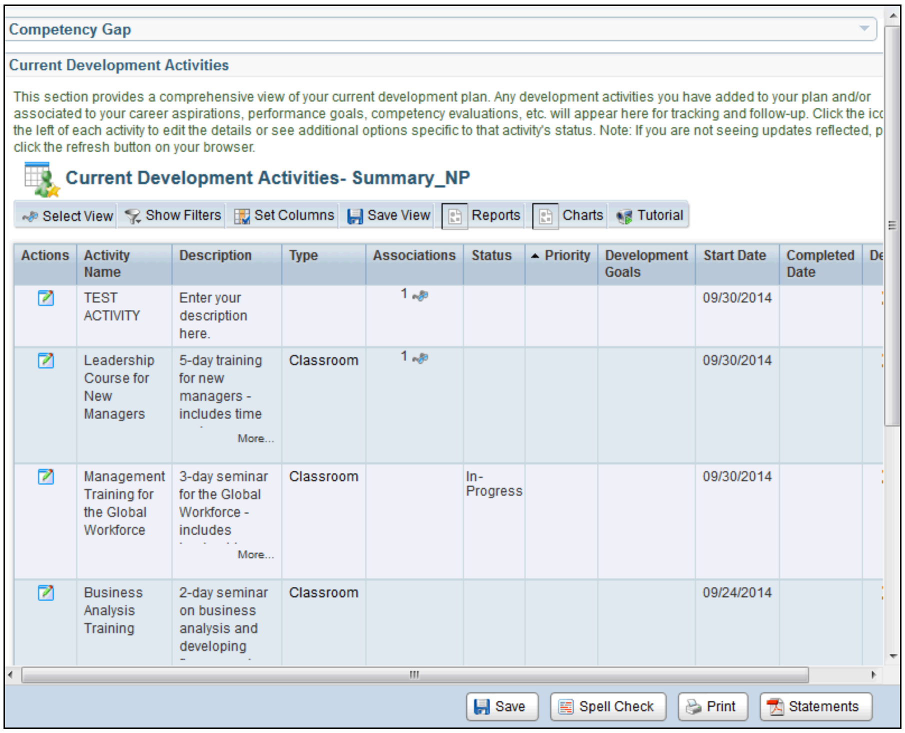


Step	Action
14.	Click the **Edit Details** button to the left of the appropriate activity.



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. 



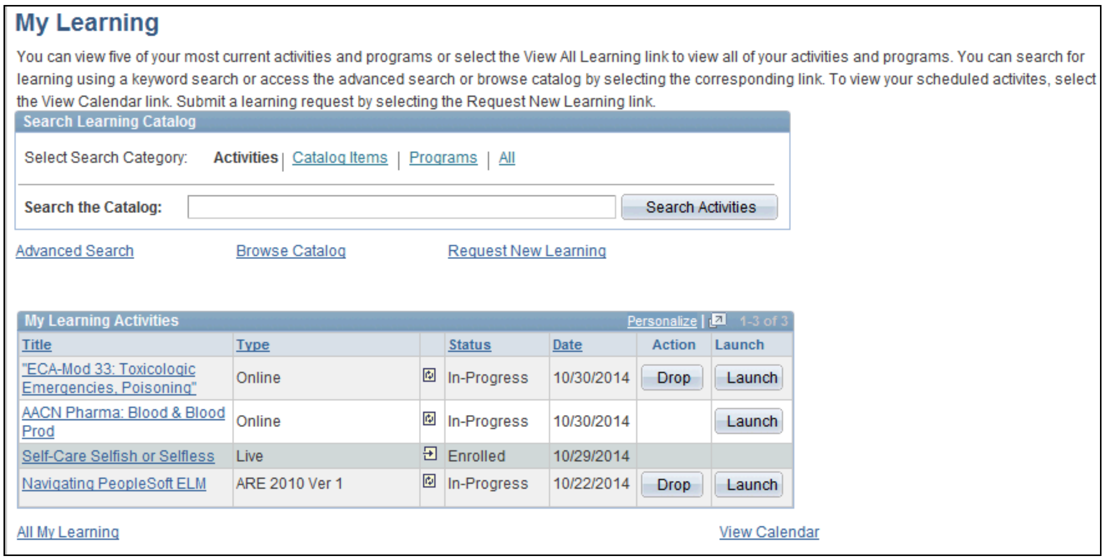
Step	Action
18.	Click the **Save** button. 
19.	**Congratulations.** You have reviewed and completed your Individual Development Plan. **End of Procedure.**

Managing Learning

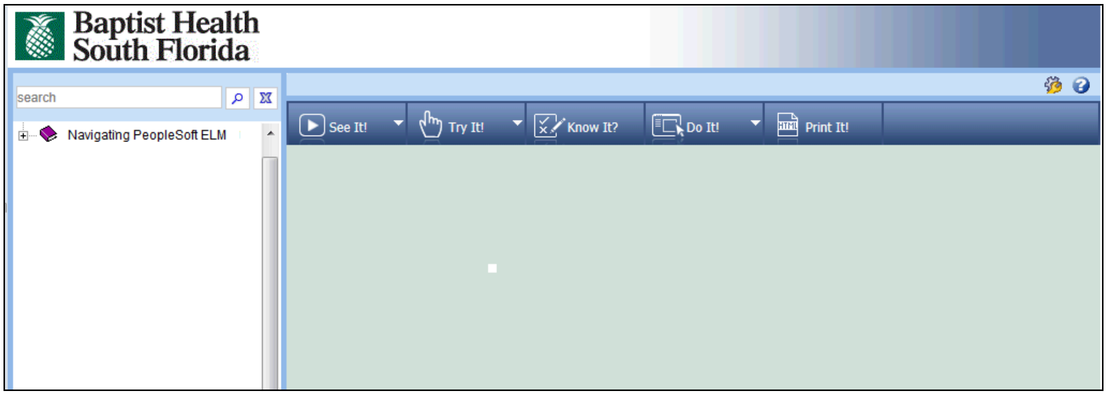
Viewing My Learning

Navigation: Main Menu > ELM > Self Service > Learning > My Learning

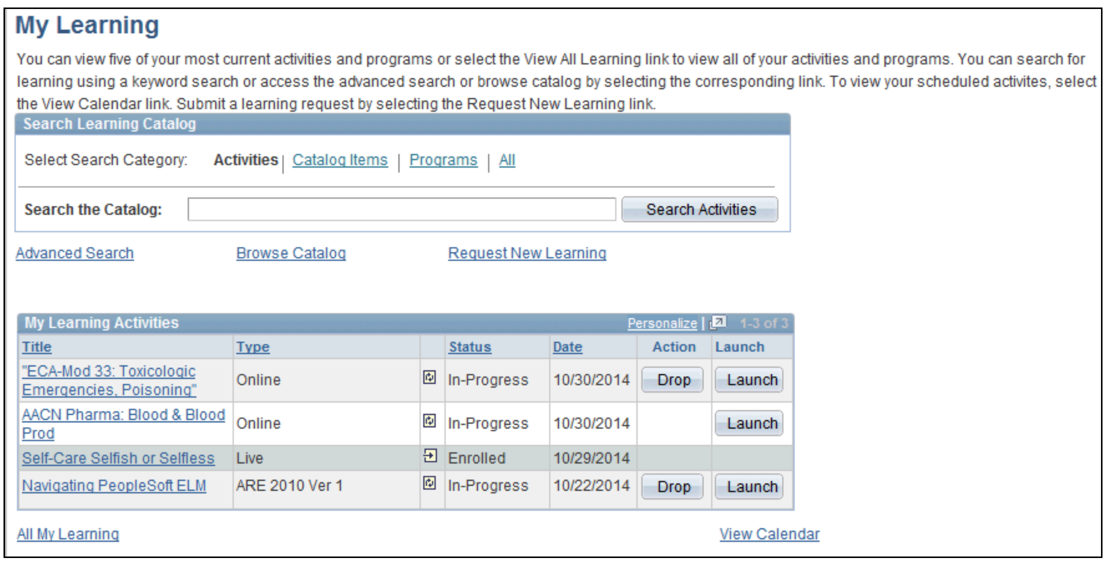
Purpose: Use this transaction to learn the basic sections of the My Learning page.



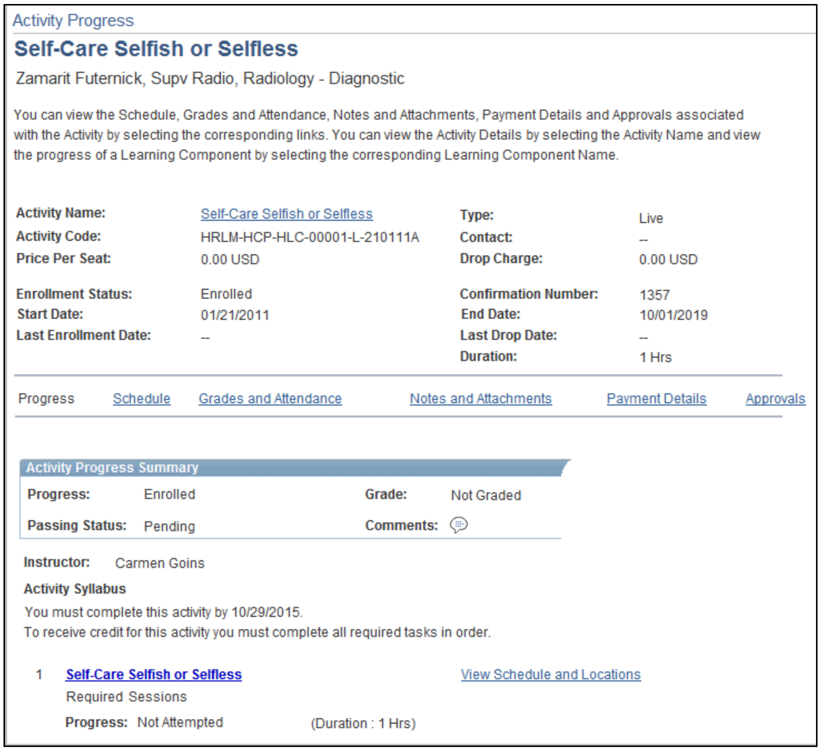
Step	Action
1.	This transaction will be a very brief exploration of the My Learning page. Additional transactions will provide instruction on how to drop a course, search the catalog, browse the catalog, and enroll in an activity beginning on this page.
2.	To search the Learning Catalog, select a search 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. 



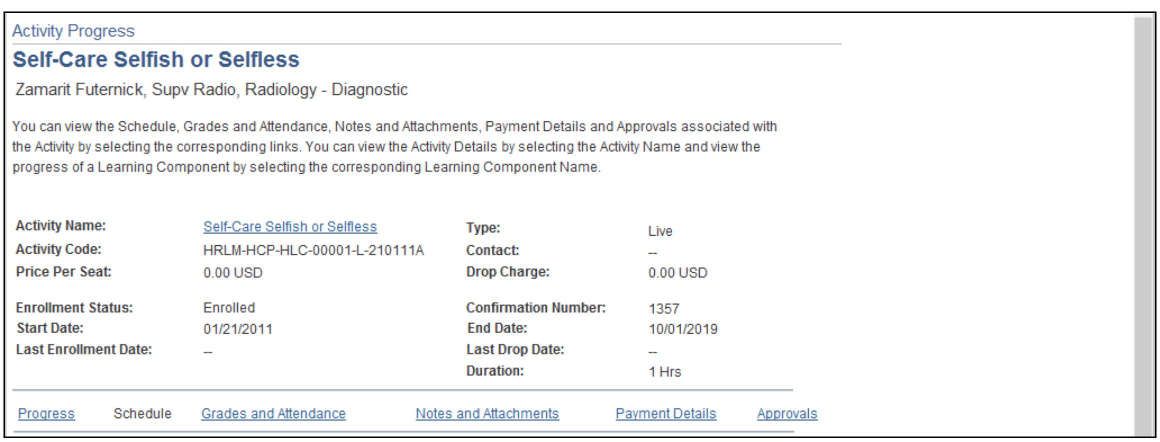
Step	Action
5.	The learning activity you launched appears, as shown, in a separate window.
6.	When you complete the lesson, the window will close and you are returned to the My Learning page.



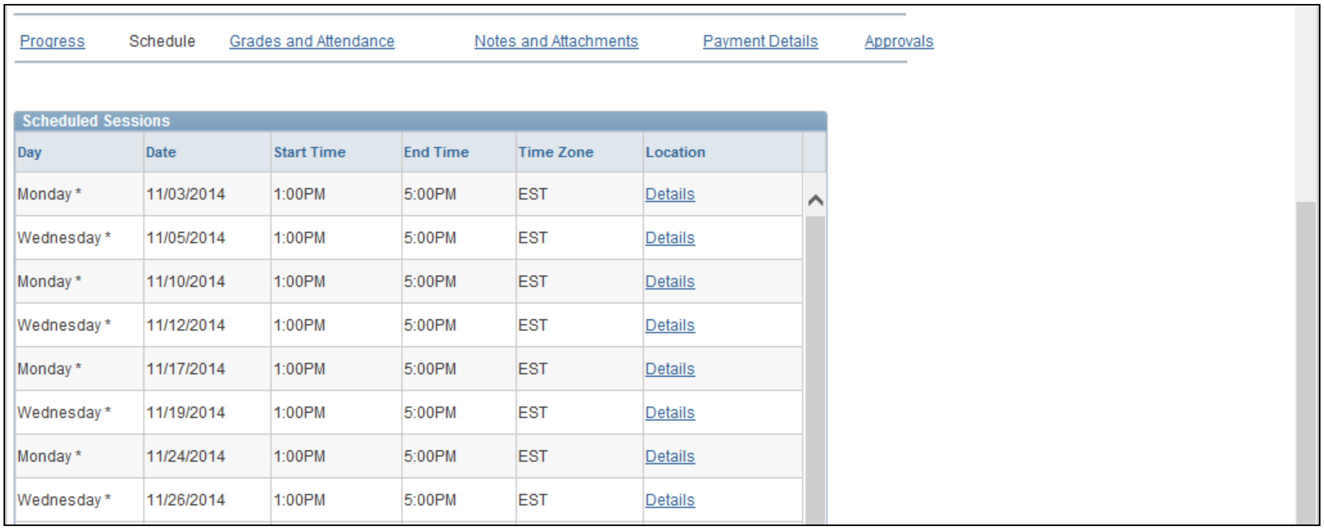
Step	Action
7.	Click the Title of an activity to view details of the activity. In this example, you will view the details of a live activity, including the activity schedule, location, date and time.
8.	Click the appropriate **Activity Title** link.



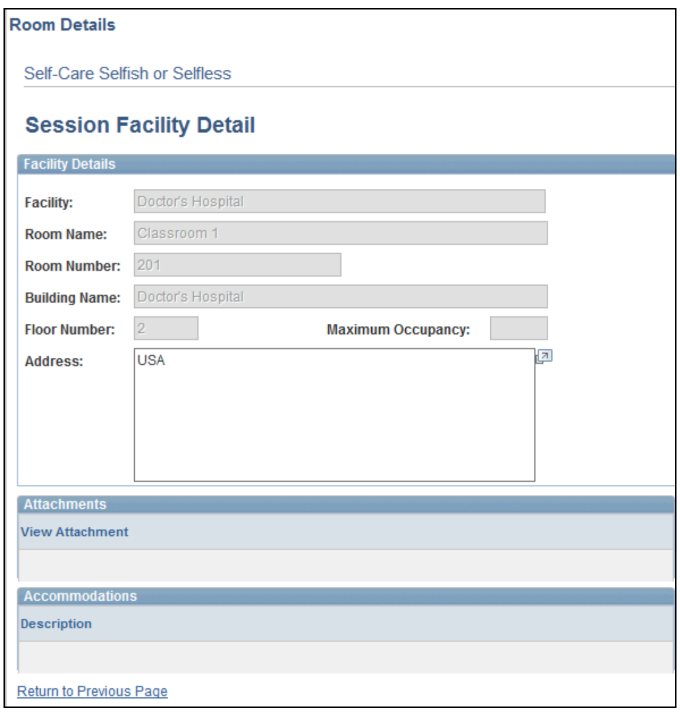
Step	Action
9.	On this page, you can view the activity schedule, grades and attendance, notes and attachments, payment details, and any approvals associated with the activity by clicking the appropriate links.
10.	Click the **View Schedule and Locations** link to view the dates, times, and locations this activity is offered. View Schedule and Locations



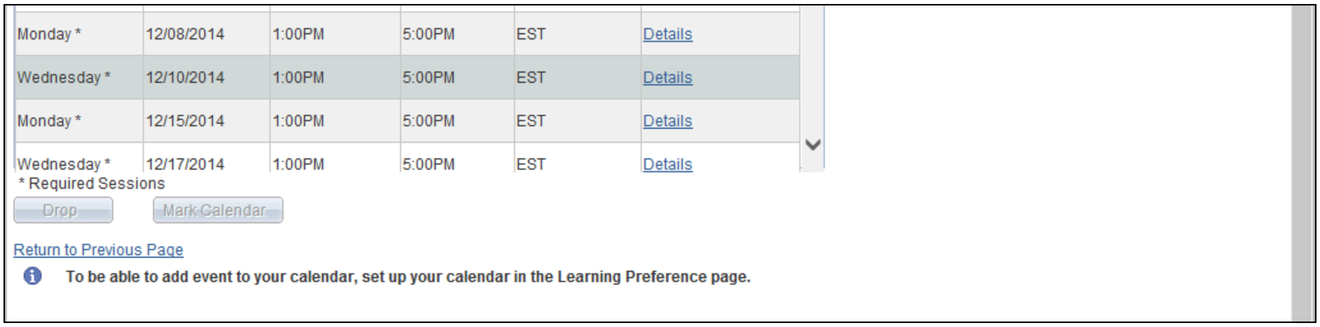
Step	Action
11.	Scroll down the page.



Step	Action
12.	To view location details about a specific session, click the **Details** link. Details



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

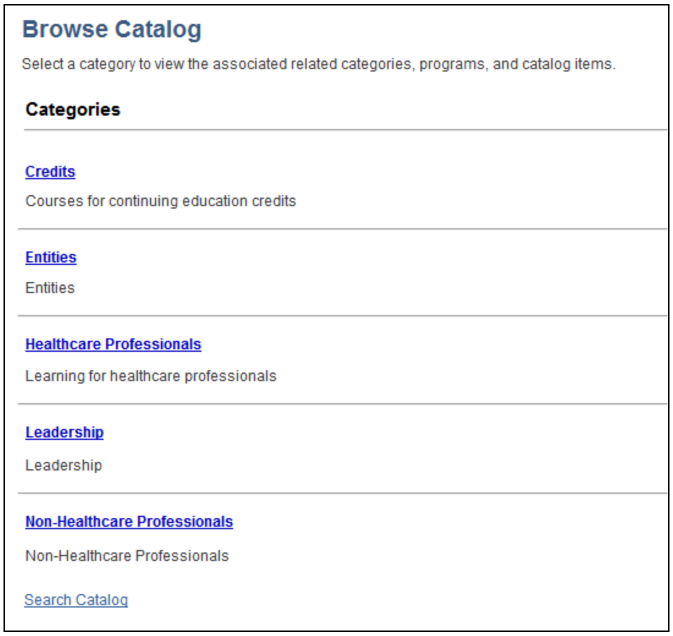


Step	Action
15.	Click the **Return to Previous Page** link. Return to Previous Page
16.	**Congratulations.** You have reviewed the My Learning page. **End of Procedure.**

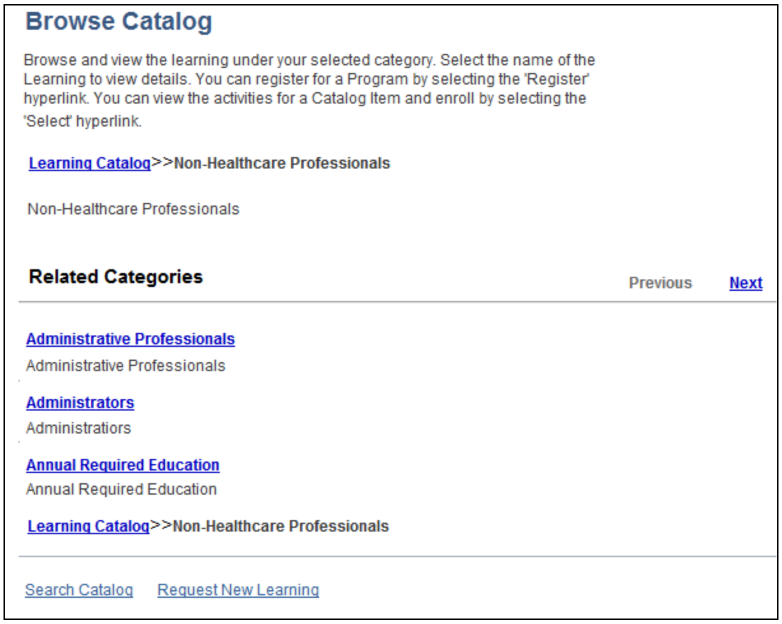
Browsing the Learning Catalog

Navigation: Main Menu > ELM > Self Service > Learning > Browse Catalog

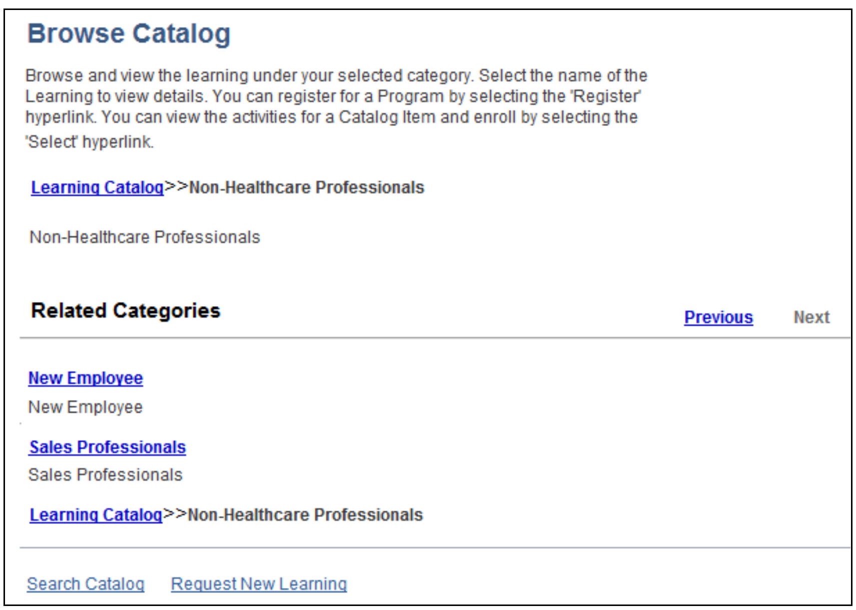
Purpose: Use this transaction to practice browsing the learning catalog and viewing the categories associated with your learning environment's primary category.



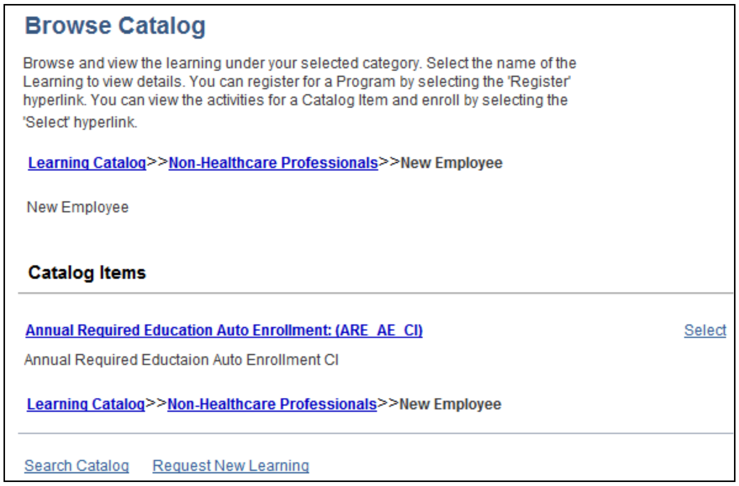
Step	Action
1.	Use the Browse Catalog page to view the categories that are associated with the BHSF learning environment.
2.	When you first access the catalog in browse mode, the system displays a list of categories of the BHSF learning environment. You will only see those categories that are associated 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.



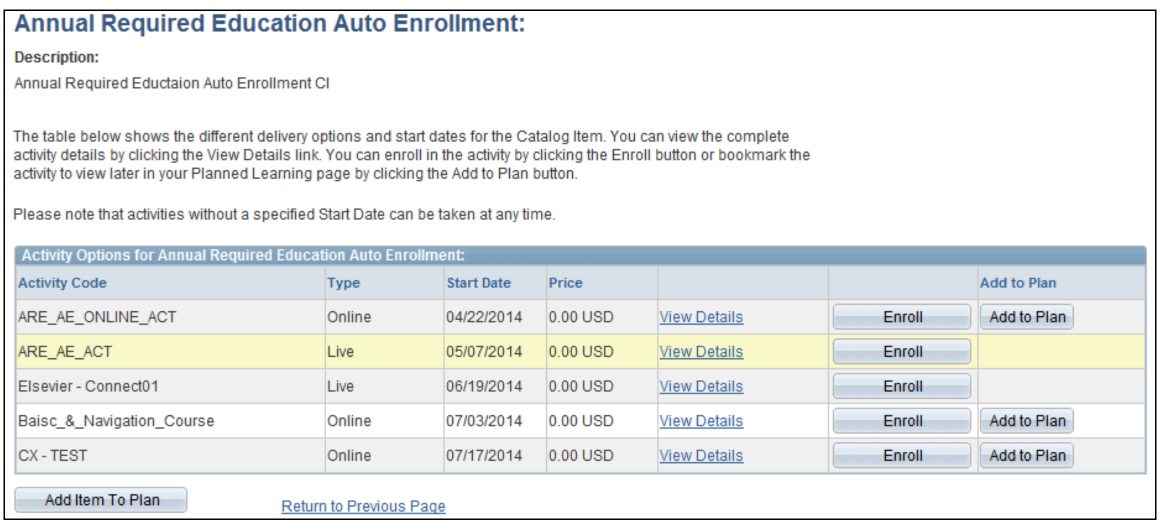
Step	Action
4.	The Related Categories are displayed. Click the **Next** link to display additional subcategories. Next



Step	Action
5.	Click the appropriate Related Category link to view additional subcategories and programs. Click the appropriate **Related Category** link.

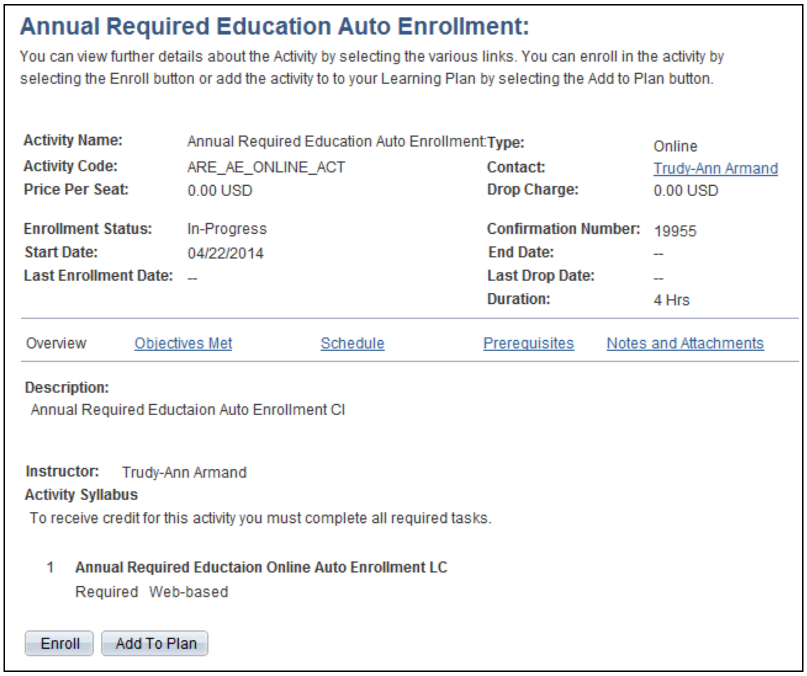


Step	Action
6.	Use the course title link to navigate to a detailed course description page. Click the appropriate **Course Title** link.



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. View Details

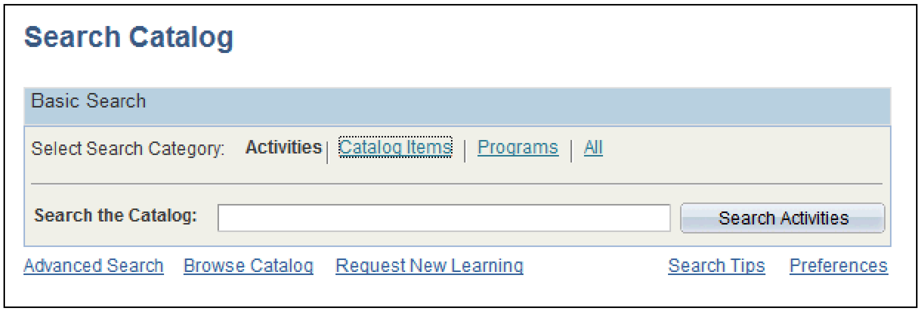


Step	Action
9.	Use the activity details page to review a description of the selected activity, objectives met, schedule, prerequisites, and any notes and attachments. You can also enroll or add the activity to your learning plan by using the Enroll and Add to Plan buttons at the bottom of the page.
10.	**Congratulations.** You have browsed the learning catalog. **End of Procedure.**

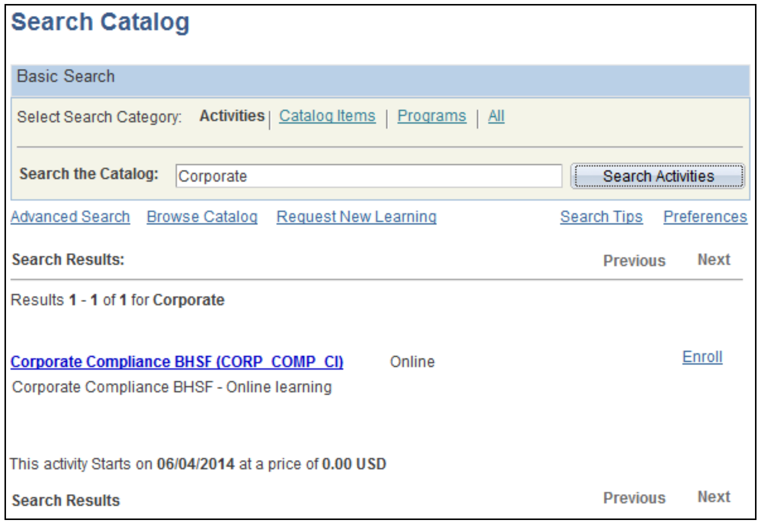
Searching the Learning Catalog

Navigation: Main Menu > ELM > Self Service > Learning > Search Catalog

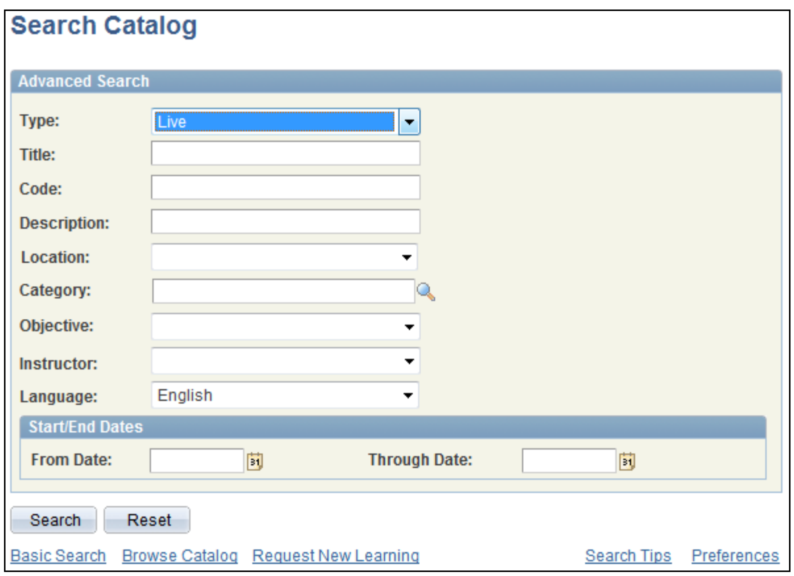
Purpose: Use this transaction to practice searching the learning catalog.



Step	Action
1.	Use the Search Catalog page to search the learning catalog. 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. In this example, you will search Activities.
2.	The system uses the Verity search engine. Click the Search Tips link to access a page with search tips.
3.	Click in the **Search the Catalog** field.
4.	Enter the desired information into the **Search the Catalog** field. For example, enter "**Corporate**".
5.	Click the **Search Activities** button. 

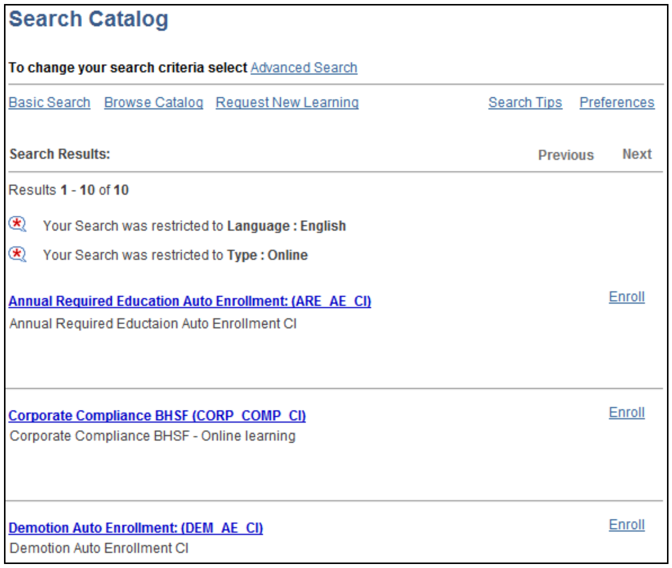


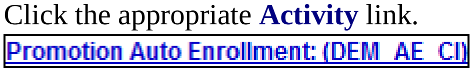
Step	Action
6.	All catalog components associated with the keyword you entered in the Search the Catalog field are displayed in the search results.
7.	Click the **Advanced Search** link. 

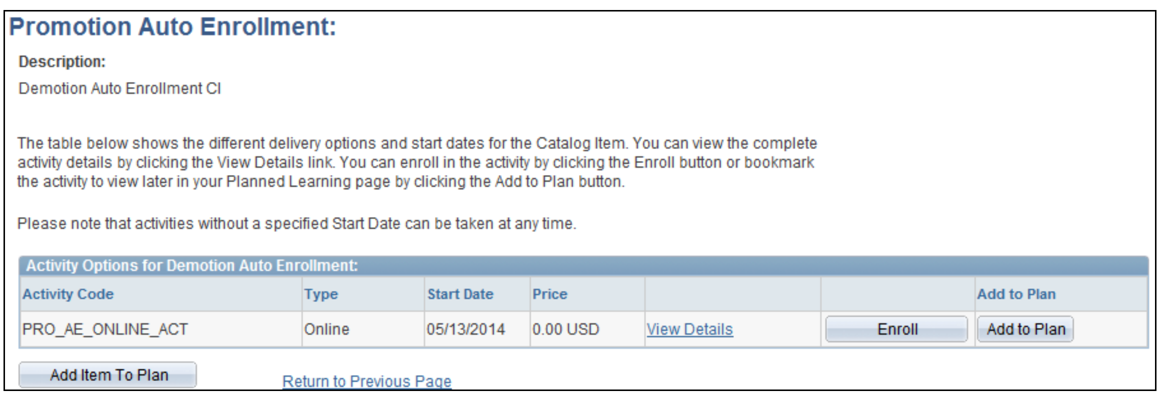


Step	Action
8.	Use Advanced Search page to filter learning activities and programs using multiple selection criteria.
9.	Click the button to the right of the **Type** field. 
10.	Click the appropriate **Type** list item.

11.	To narrow your search results, enter additional criteria. Click the **Search** button. 



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. 

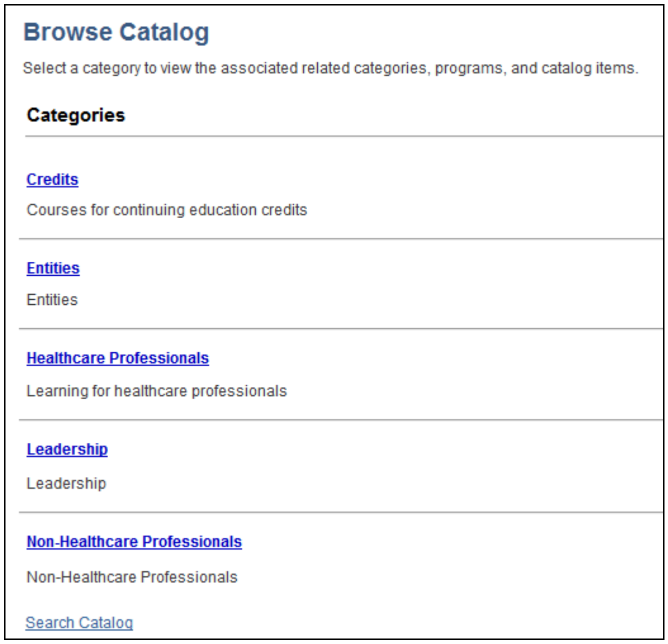


Step	Action
14.	Use the course title page to review the selected course description, scheduling options, enroll in the course, or add the course to your learning plan.
15.	**Congratulations.** You have searched the learning catalog. **End of Procedure.**

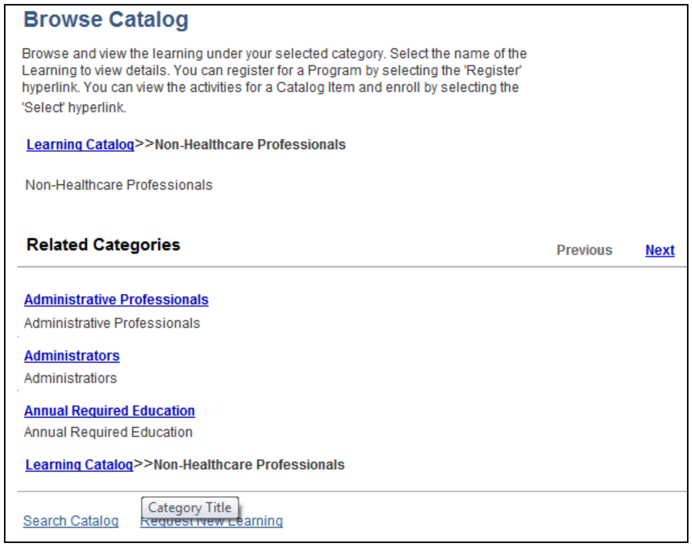
Enrolling in an Activity

Navigation: Main Menu > ELM > Self Service > Learning > Browse Catalog

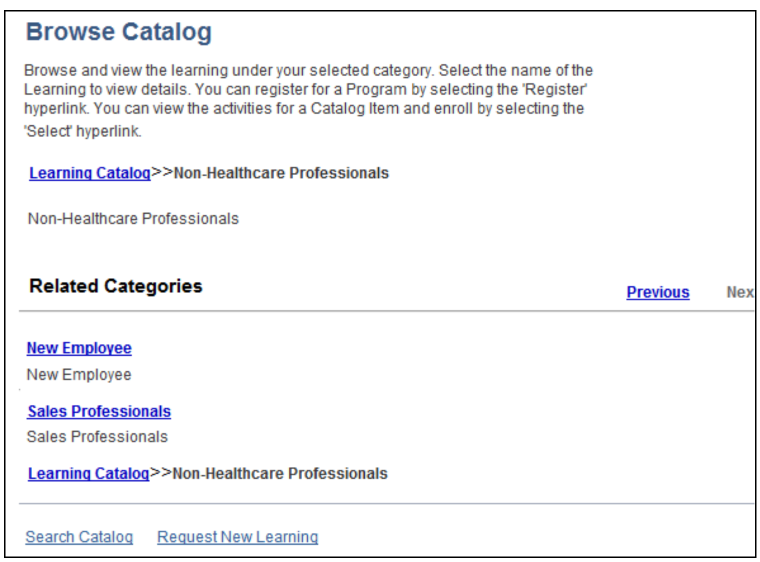
Purpose: Use this transaction to learn how to enroll in an activity.



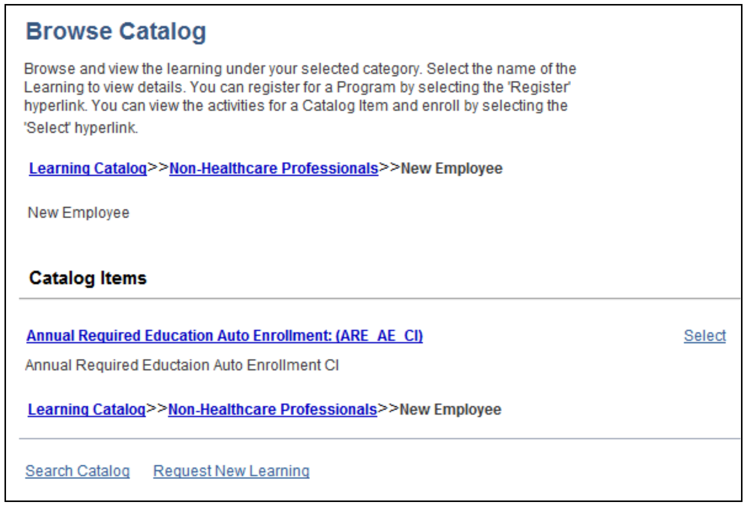
Step	Action
1.	You can find and enroll in a learning activity by browsing or searching the learning catalog. In this example, you will browse the catalog.
2.	Use the Browse Catalog page to view the categories that are associated with the BHSF learning environment’s primary category. When accessing the 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.



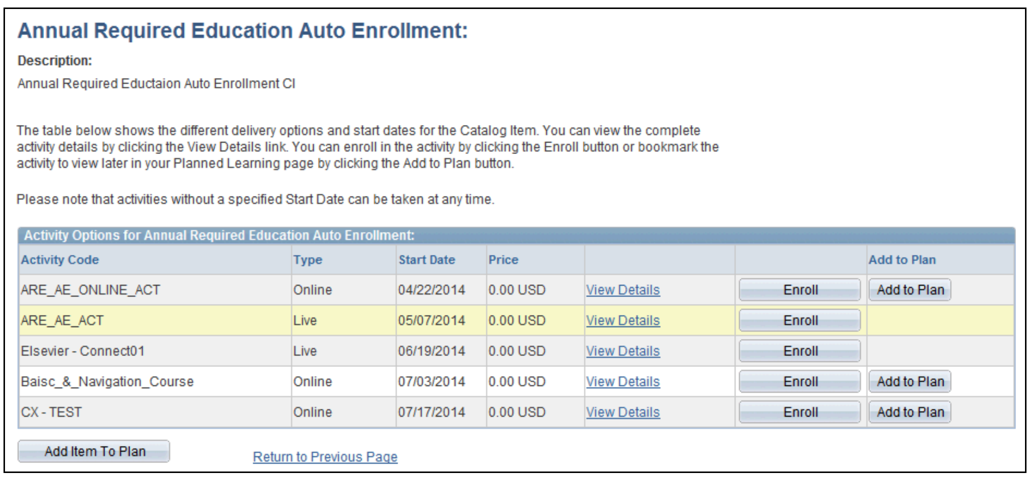
Step	Action
4.	The Related Categories are displayed. Click the **Next** link to display additional subcategories. Next

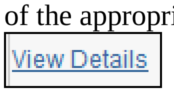


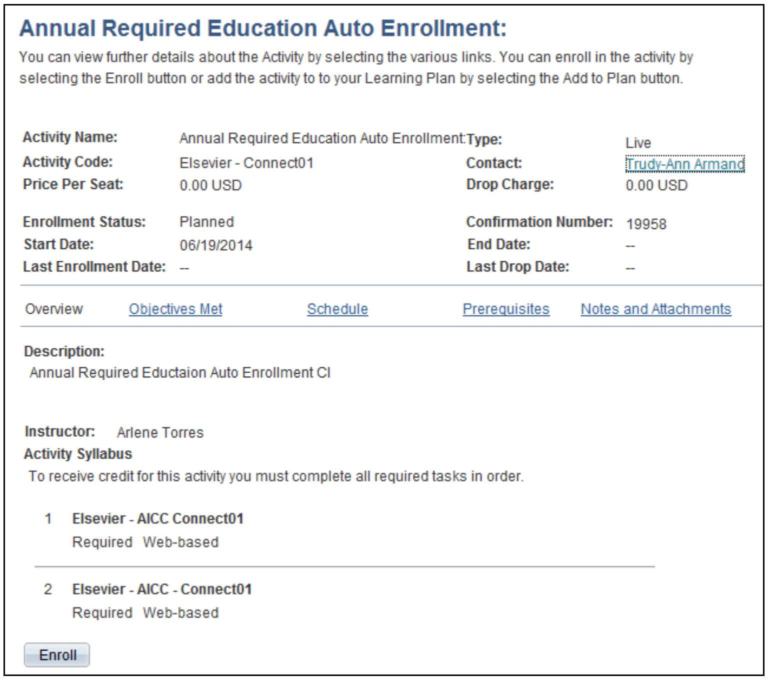
Step	Action
5.	Click the appropriate Related Category link to view additional subcategories and programs. Click the appropriate **Related Category** link.



Step	Action
6.	Use the course title link to navigate to a detailed course description page. Click the appropriate **Course Title** link.

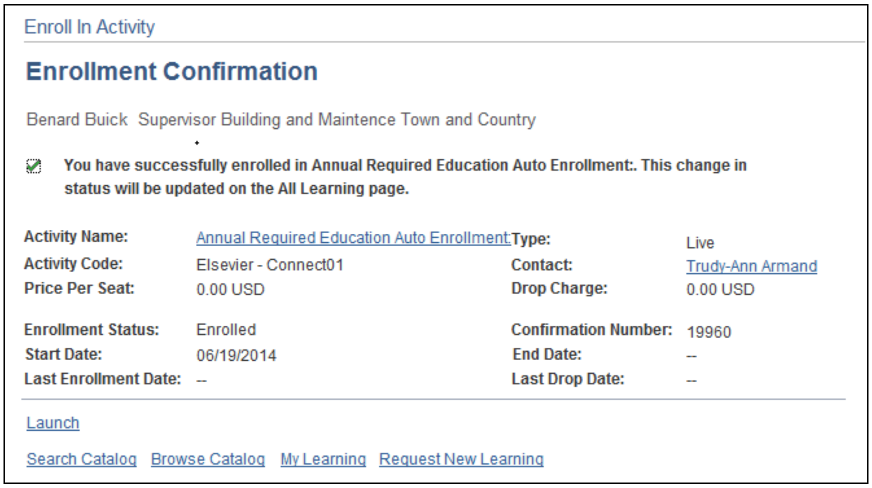


Step	Action
7.	Use the selected course page to review the course description and scheduling options, enroll in the course, or add the course to your learning plan.
8.	To view additional details about an activity, click the **View Details** link to the right of the appropriate activity. 



Step	Action
9.	Use the activity details page to review all the details for the activity before you enroll.
10.	Click the **Enroll** button. Enroll

Step	Action
11.	Click the **Submit Enrollment** button. Submit Enrollment

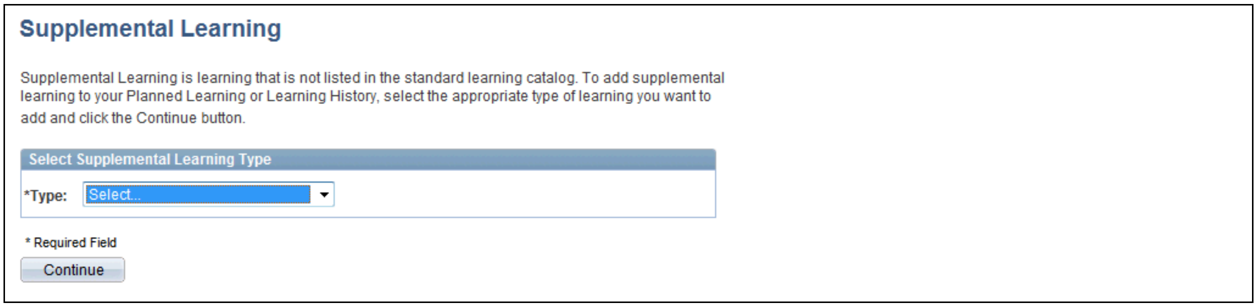


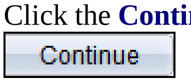
Step	Action
12.	Your enrollment has been confirmed. You can verify your enrollment on your My Learning page.
13.	The My Learning page lists the course you have enrolled in as Planned. When you begin the course, the status will change to In Progress.
14.	**Congratulations.** You have enrolled in an activity. **End of Procedure.**

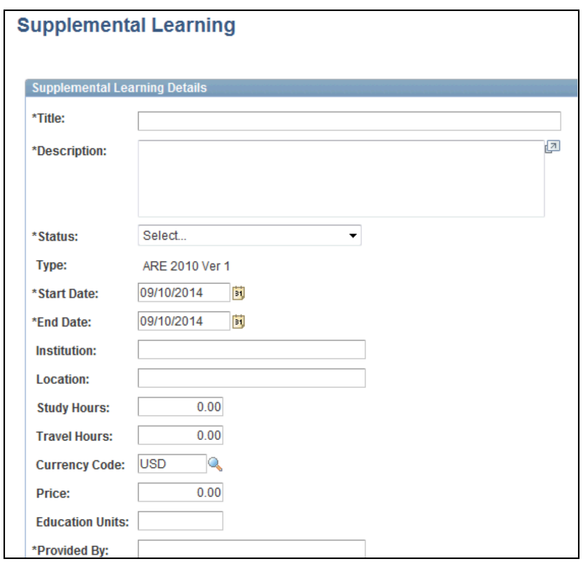
Adding Supplemental Learning Activities

Navigation: Main Menu > ELM > Self Service > Learning > Supplemental Learning

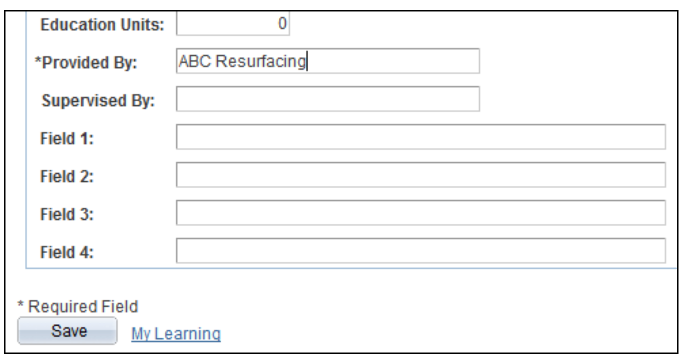
Purpose: Use this transaction to practice adding or requesting supplemental learning.

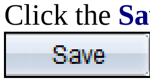


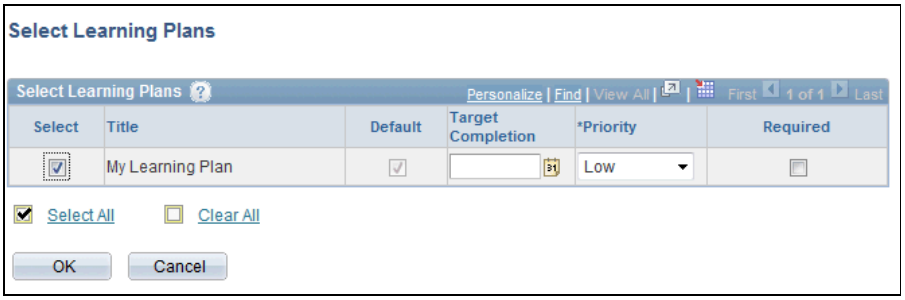
Step	Action
1.	Use the Supplemental Learning page to add supplemental learning not listed in the standard catalog to your learning plan.
2.	Click the button to the right of the **Type** field. 
3.	Click the appropriate **Type** list item.
4.	Click the **Continue** button. 



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.



Step	Action
21.	Click the **Save** button. 

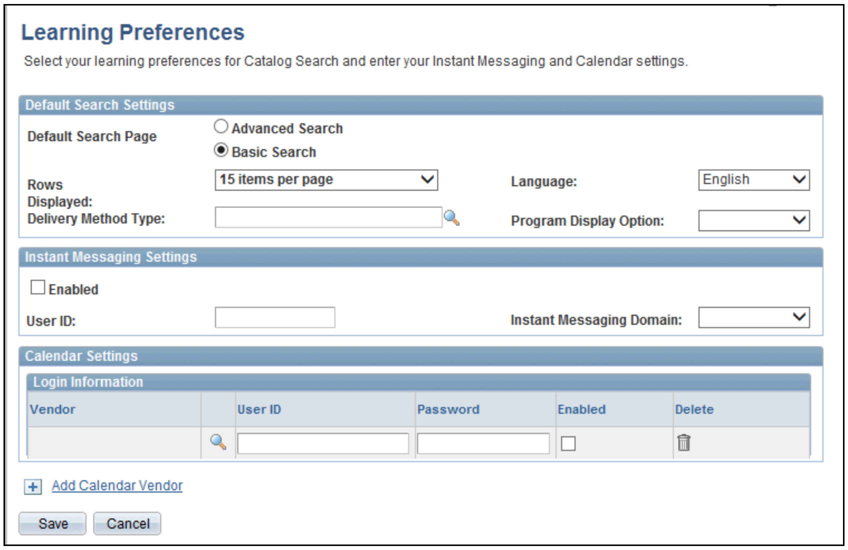


Step	Action
22.	Click the **OK** button. 
23.	**Congratulations.** You have completed the Request Learning Credit for Supplemental Learning transaction and now you should be able to add or request supplemental learning. **End of Procedure.**

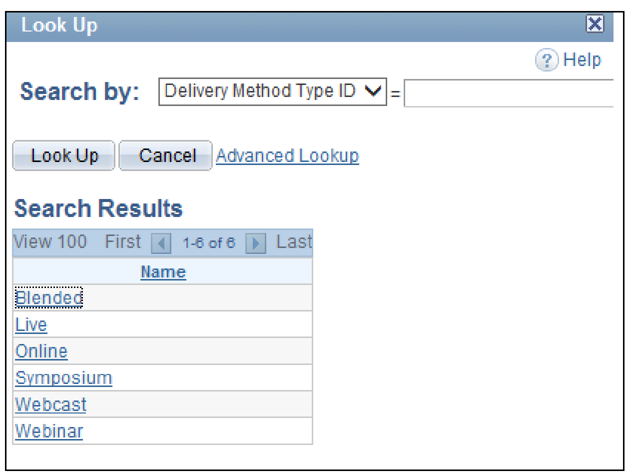
Setting My Learning Preferences

Navigation: Main Menu > ELM > Self Service > Personal Information > Personal Information Home

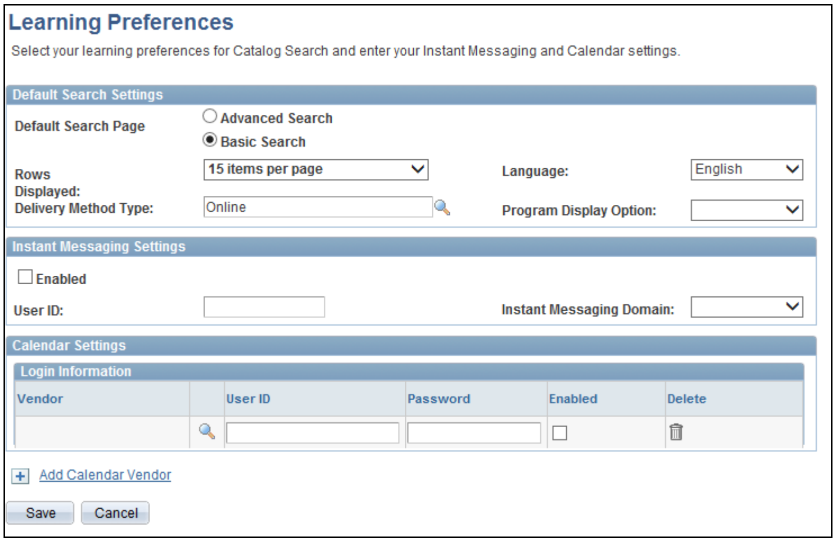
Purpose: Use this transaction to practice setting your individual learner preferences in ELM.



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. 



Step	Action
3.	Click the **Online** link. Online

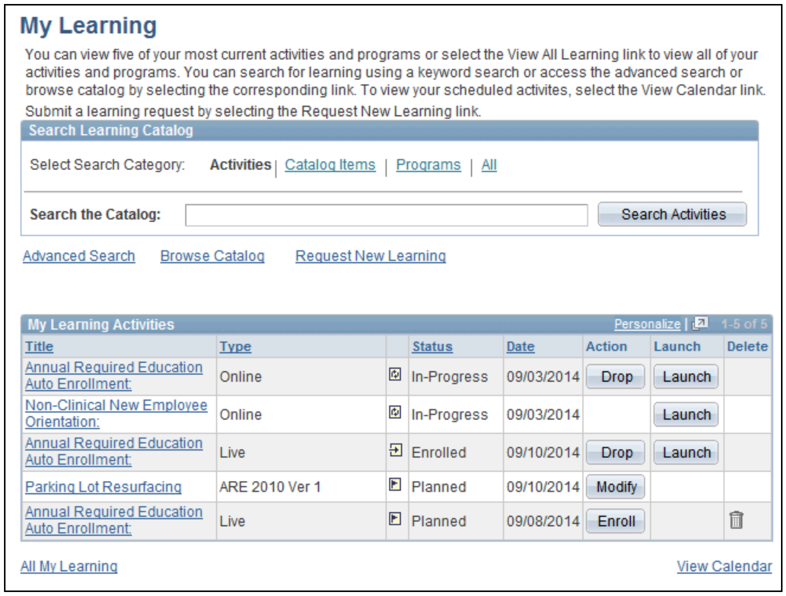


Step	Action
4.	Click the **Program Display Option** list.
5.	You can select programs to display as either expanded or collapsed.
6.	Click the **Enabled** option. Enabled
7.	Enter the desired information into the **User ID** field.
8.	Click the **Instant Messaging Domain** list.
9.	Click the **YAHOO** list item. YAHOO
10.	Click the **Save** button. Save
11.	**Congratulations**. You have set your learning preferences for ELM. **End of Procedure.**

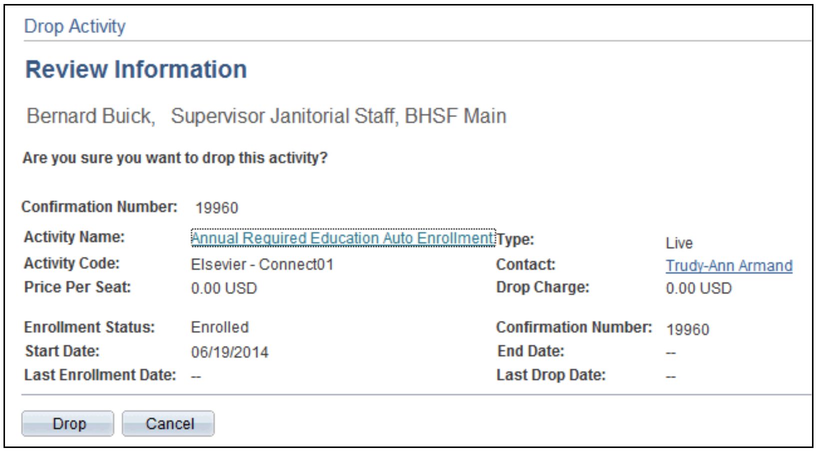
Dropping an Enrollment

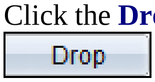
Navigation: Main Menu > ELM > Self Service > Learning > My Learning

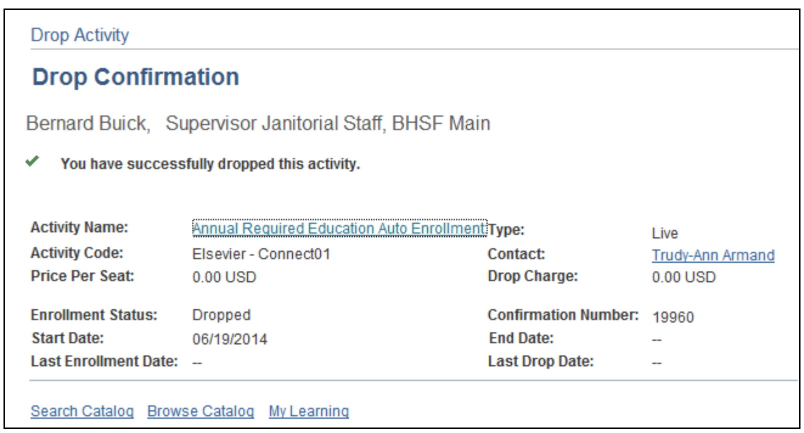
Purpose: Use this transaction to practice dropping an enrollment.



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. 



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. 

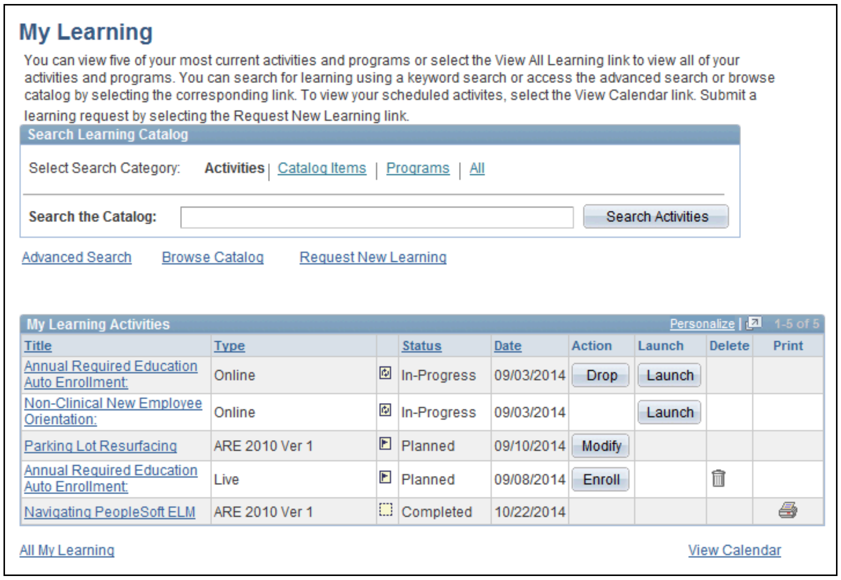


Step	Action
6.	Note, you have successfully dropped the activity.
7.	**Congratulations**. You have dropped an enrollment. **End of Procedure.**

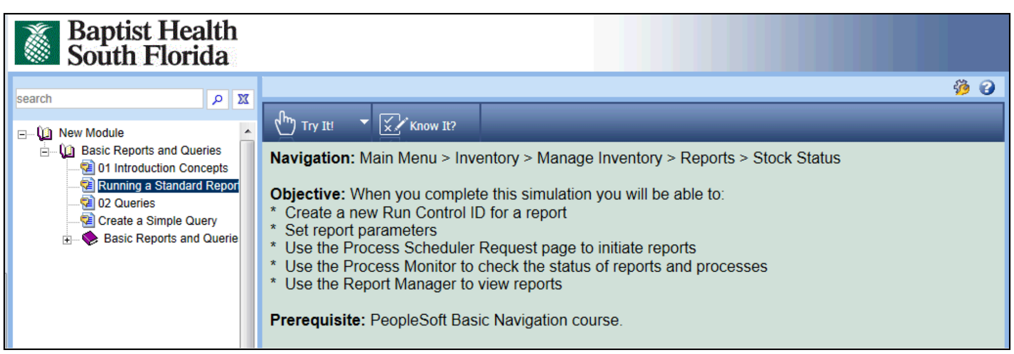
Launching Web-based Session or Materials

Navigation: Main Menu > ELM > Self Service > Learning > My Learning

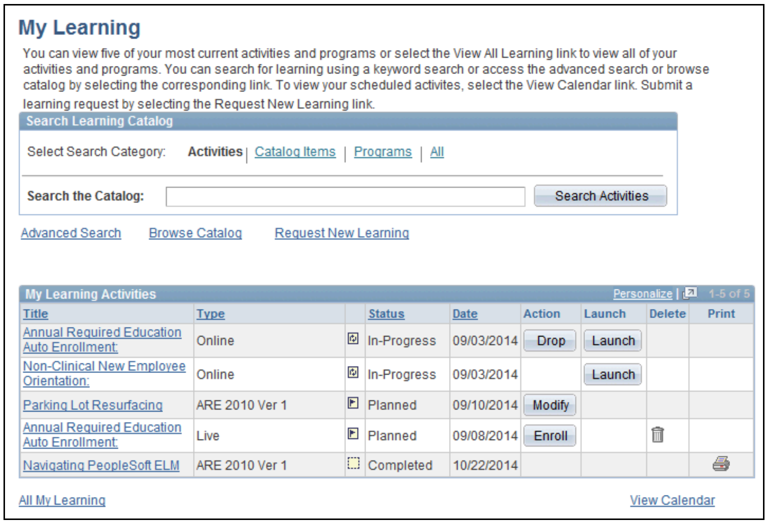
Purpose: Use this transaction to practice launching web-based sessions or materials.



Step	Action
1.	Use the My Learning page to review your five most current activities and programs. Use buttons on the page to enroll in, delete, or drop an activity or program, modify supplemental learning, or launch web-based learning. In this example, you will launch web-based learning.
2.	Click the **Launch** button to the right of the appropriate activity. Launch



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.

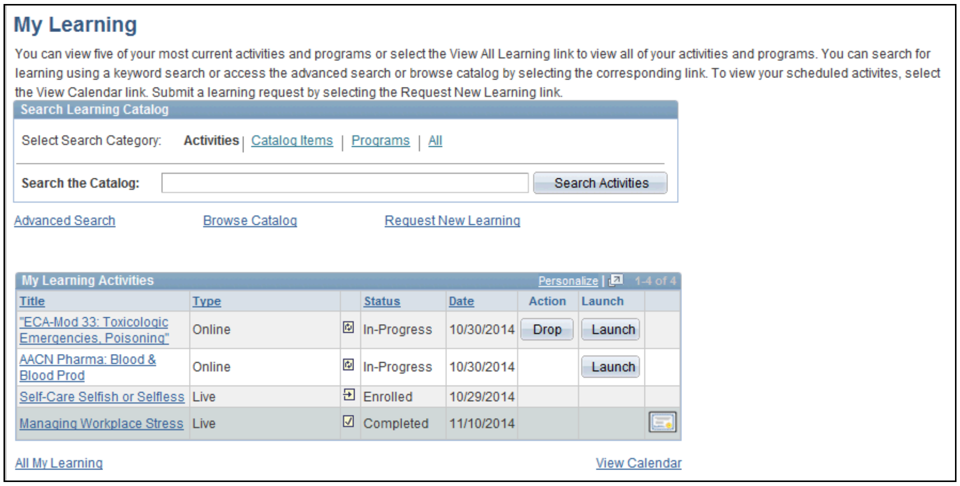


Step	Action
4.	You are returned to My Learning page.
5.	**Congratulations.** You have launched a web-based session/material. **End of Procedure.**

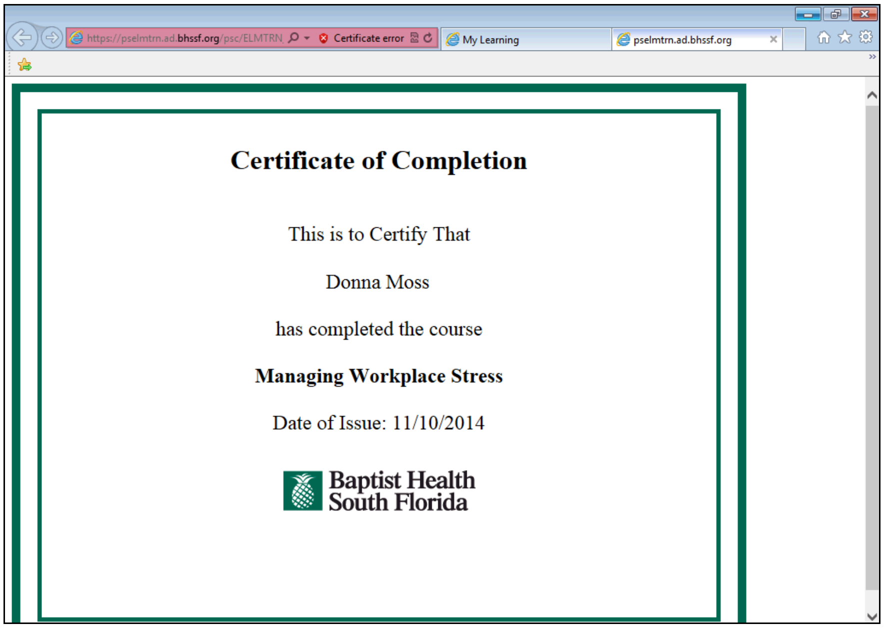
Printing Completion Certification

Navigation: Main Menu > ELM > Self Service > Learning > My Learning

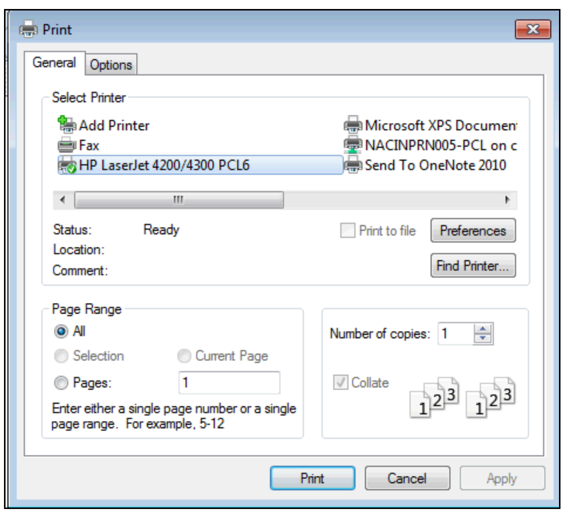
Purpose: Use this simulation to practice printing a certificate for completed learning.

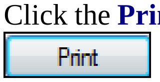


Step	Action
1.	Use the My Learning page to view your five most recent learning activities and launch learning, add or drop learning activities and programs, and print a completion certificate. In this example, you will print a certificate for completed learning.
2.	Click the **Print Certificate** button 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. 



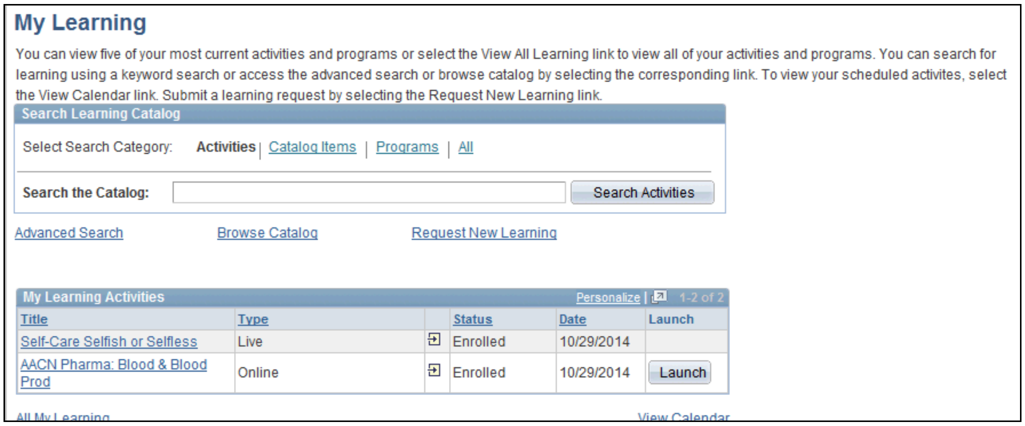
Step	Action
6.	Click the **Print** button. 

Step	Action
7.	Click the **Close Tab (Ctrl+W)** button. 
8.	**Congratulations.** You have printed a certificate of completion. **End of Procedure.**

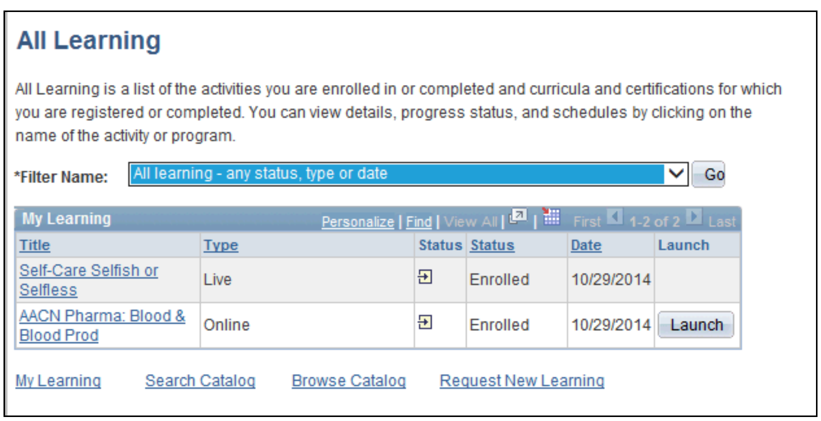
Reviewing Program Status and Progress

Navigation: Main Menu > ELM > Self Service > Learning > My Learning

Purpose: Use this transaction to practice reviewing program and activity statuses and progress.



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



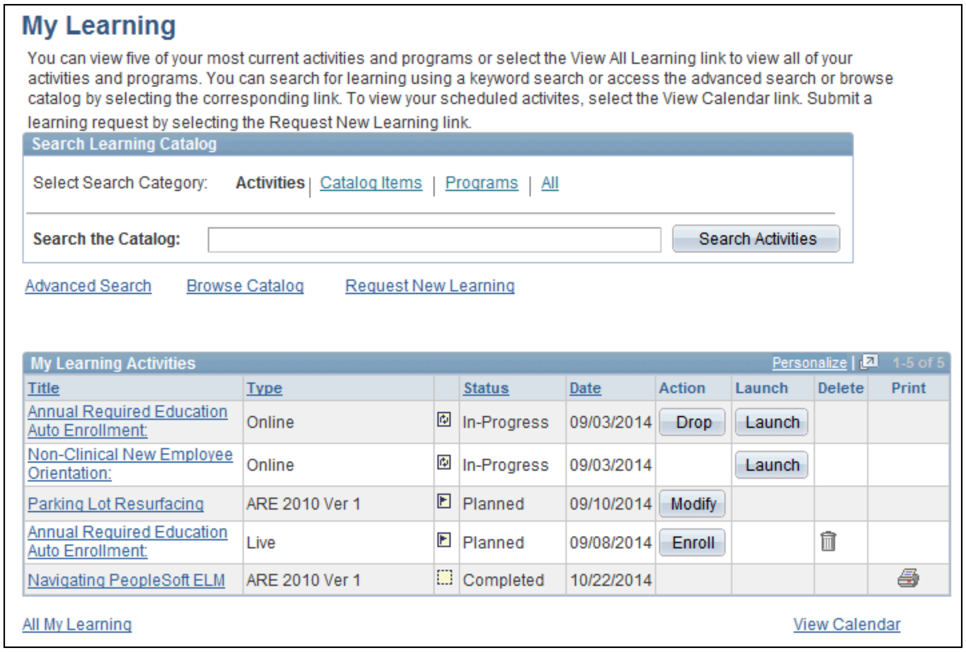
Step	Action
3.	Use the All Learning page to review a list of all activities you are enrolled in or completed, as well as curricula and certifications for which you are registered or completed. You can also view details and progress status by clicking on the name of an activity or program. Use the Filter 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.**

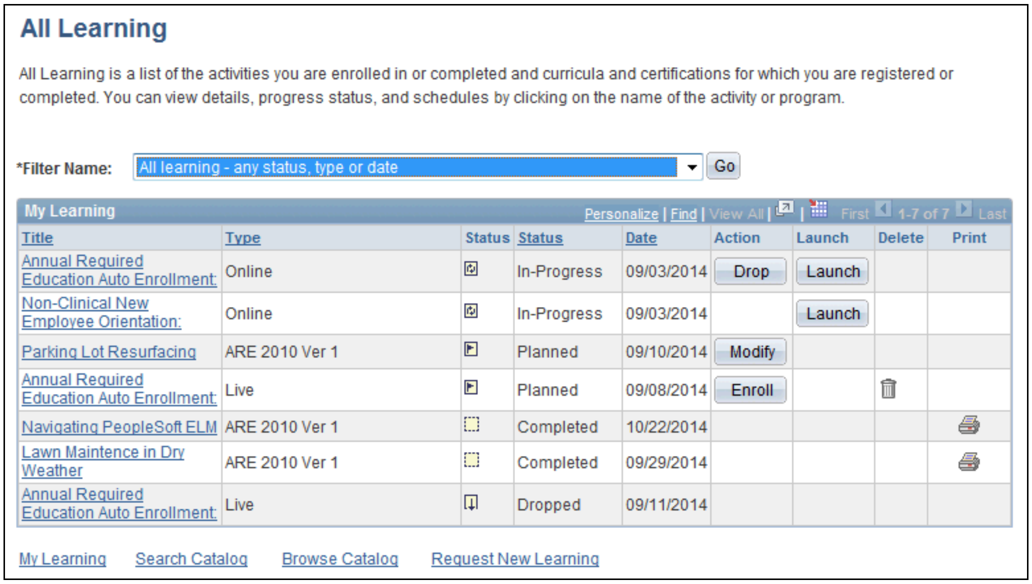
Reviewing Overall Learning Progress

Navigation: Main Menu > ELM > Self Service > Learning > My Learning

Purpose: Use this transaction to practice reviewing your overall learning progress.



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



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.**

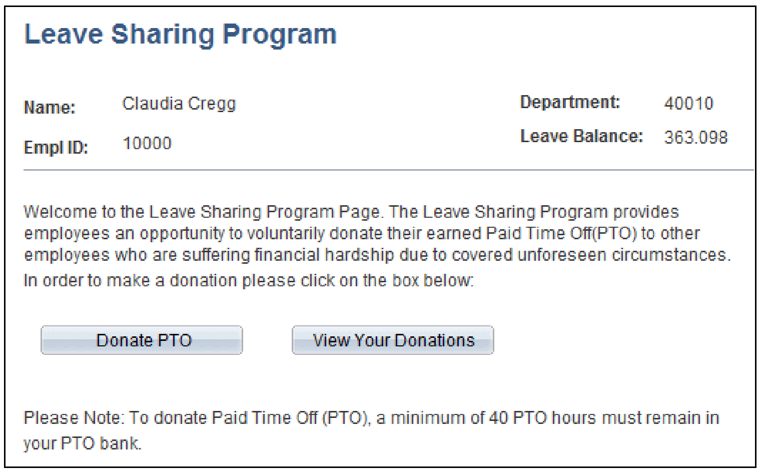
Managing Paid Time Off

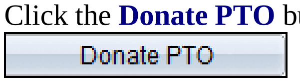
Donating Paid Time Off

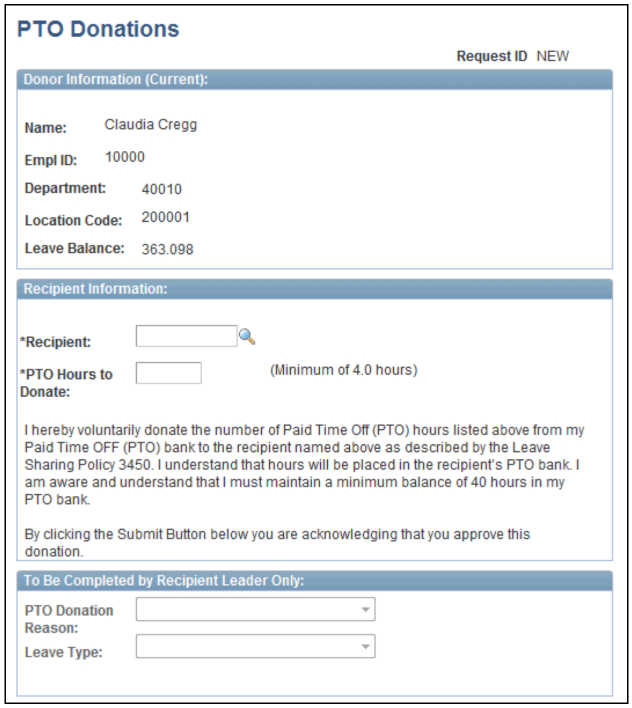
Navigation: Main Menu > HCM > Self Service > Benefits > PTO Donations

Purpose: Use this transaction to practice donating a portion of your paid time off to another employee.

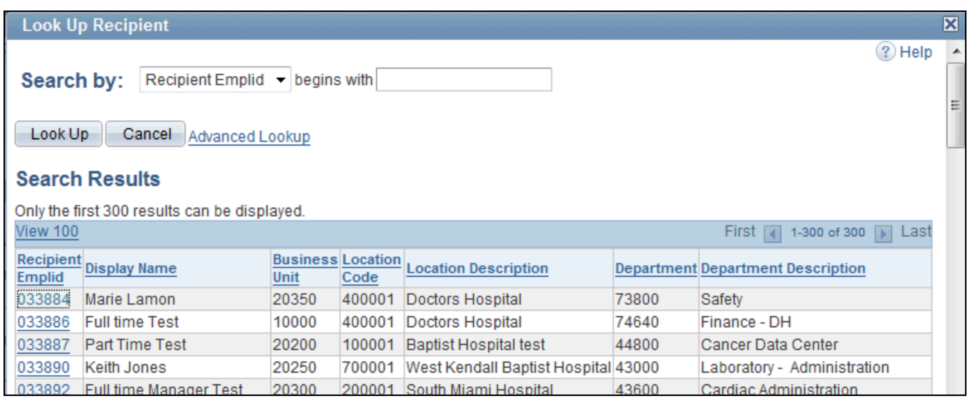
Prerequisites: You must donate at least 4 hours, have more than 40 hours of PTO and, after donation, must have a balance of at least 40 hours PTO remaining.



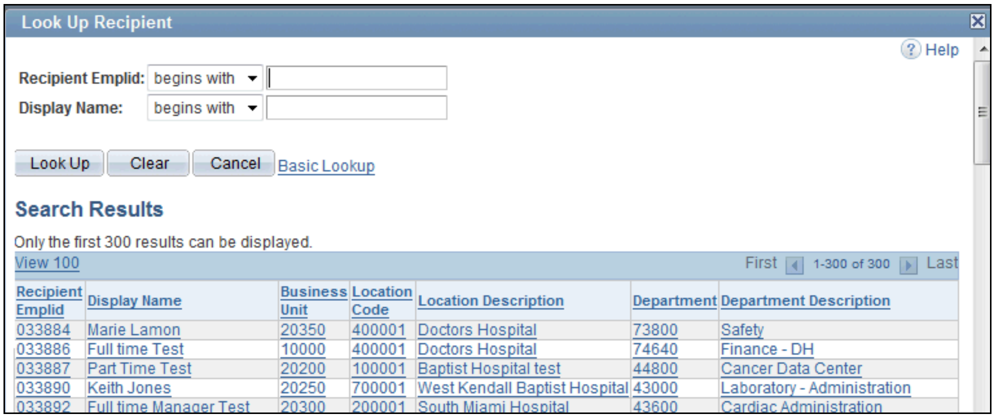
Step	Action
1.	Click the **Donate PTO** button. 

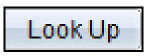


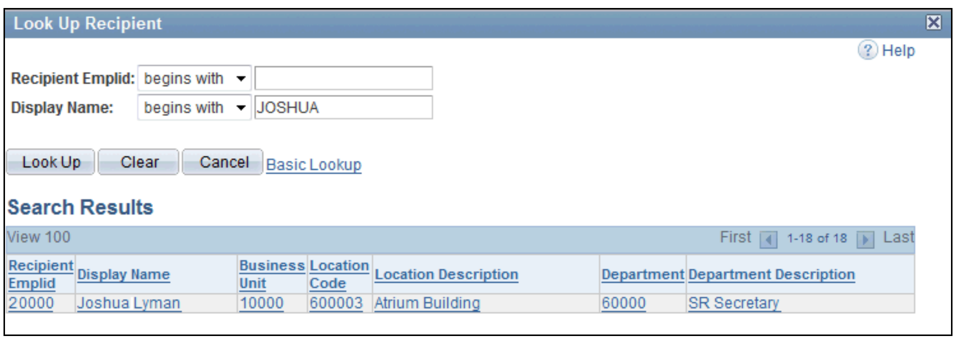
Step	Action
2.	Click the **Look up Recipient (Alt+5)** button. 



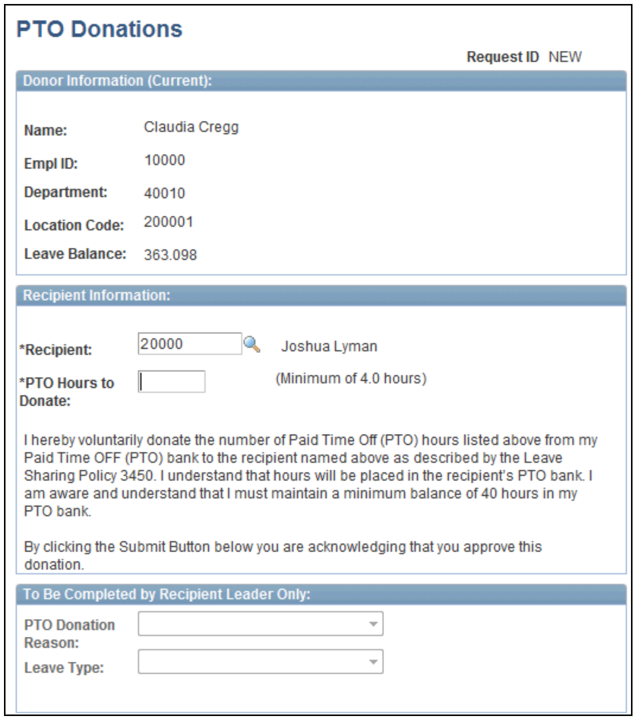
Step	Action
3.	Click the **Advanced Lookup** link. Advanced Lookup



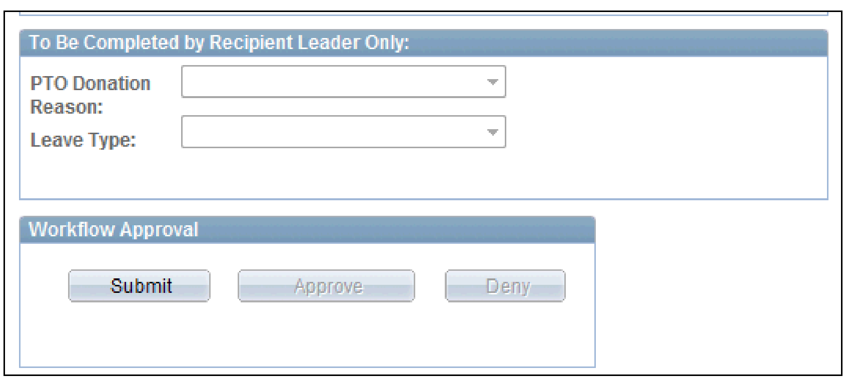
Step	Action
4.	Enter the desired information into the **Display Name** field.
5.	Click the **Look Up** button. 

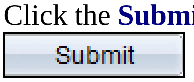


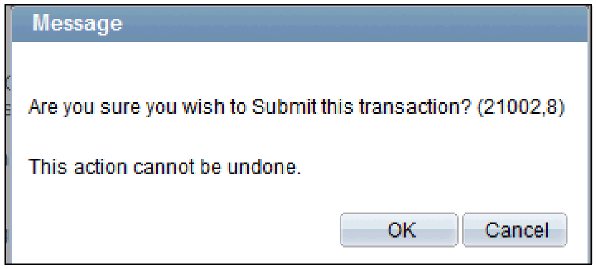
Step	Action
6.	Click the appropriate **Recipient Emplid** link.



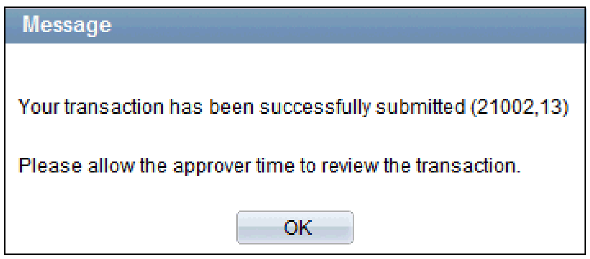
Step	Action
7.	Enter the desired information into the **PTO Hours to Donate** field.
8.	Scroll down the page.

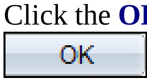


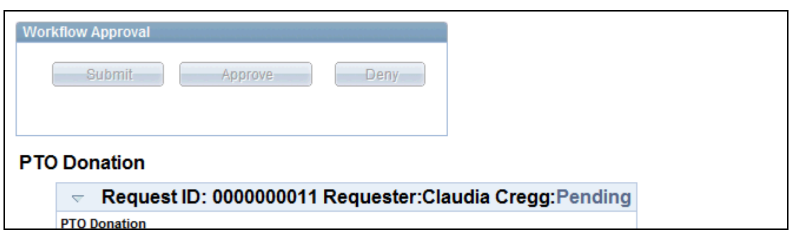
Step	Action
9.	Click the **Submit** button. 



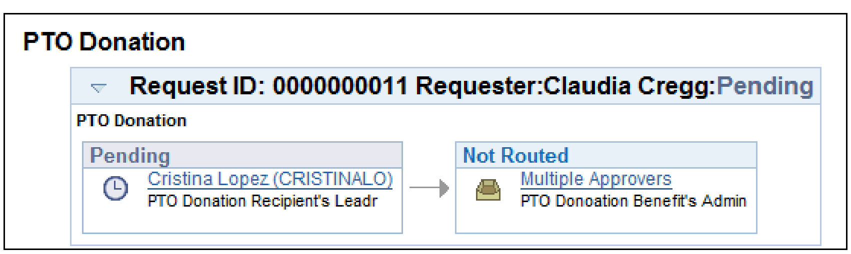
Step	Action
10.	Click the **OK** button. 



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.

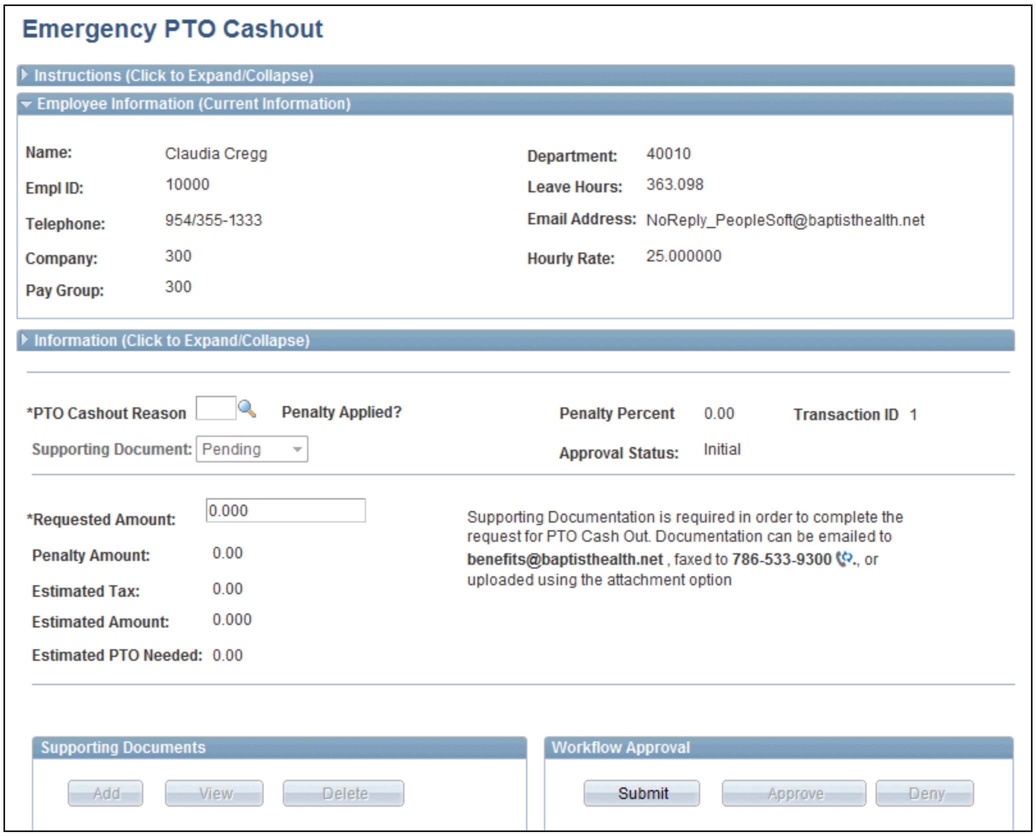
Step	Action
14.	**Congratulations.** You have donated PTO to another employee. **End of Procedure.**

Emergency Paid Time Off Cashout

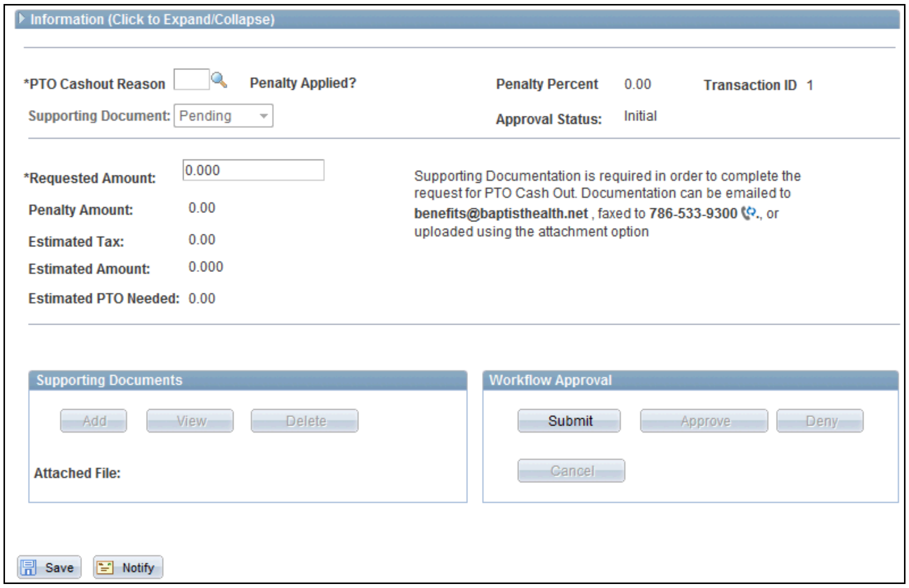
Navigation: Main Menu > HCM > Self Service > Benefits > Emergency PTO Cashout

Purpose: Use this transaction to practice cashing out Paid Time Off for use in an emergency situation.

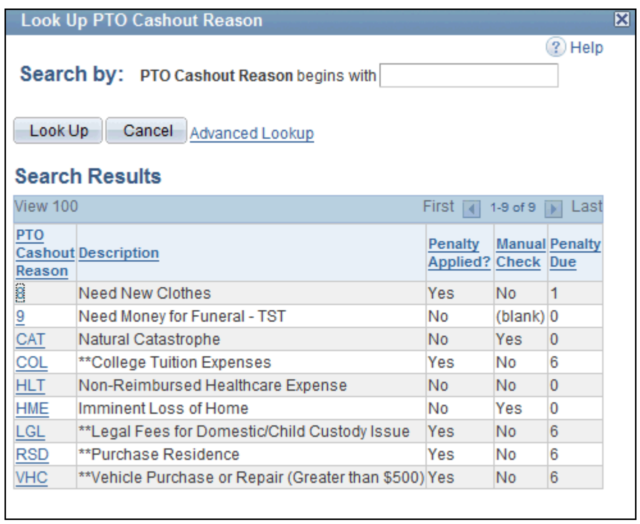
Prerequisites: You must donate at least 4 hours, have more than 40 hours of PTO and, after donation, must have a balance of at least 40 hours PTO remaining.



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.

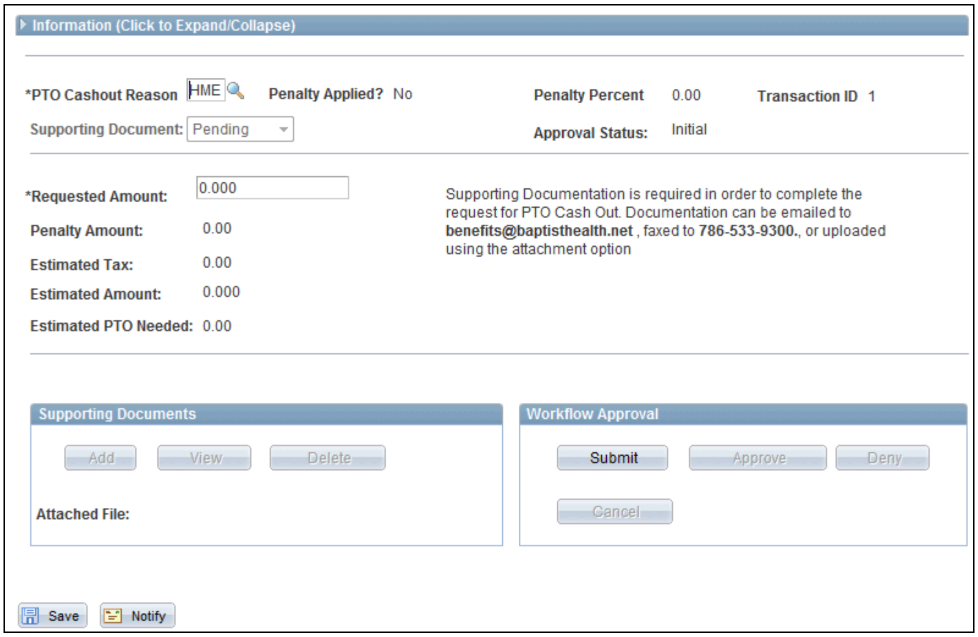


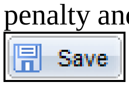
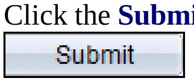
Step	Action
3.	Click the **Look up PTO Cashout Reason (Alt+5)** button.

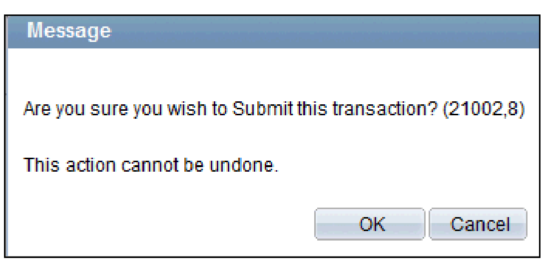


Step	Action
4.	Select the appropriate PTO Cashout Reason from the table. Before continuing to cashout, you may want to consider whether a penalty will be applied and, if there is a penalty, the penalty due. The penalty can range from 1-6% of the requested dollar amount. You may also want to consider whether you will be receiving a manual check.

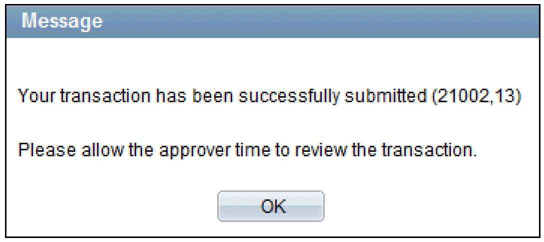
Step	Action
5.	Click the appropriate **PTO Cashout Reason** link.



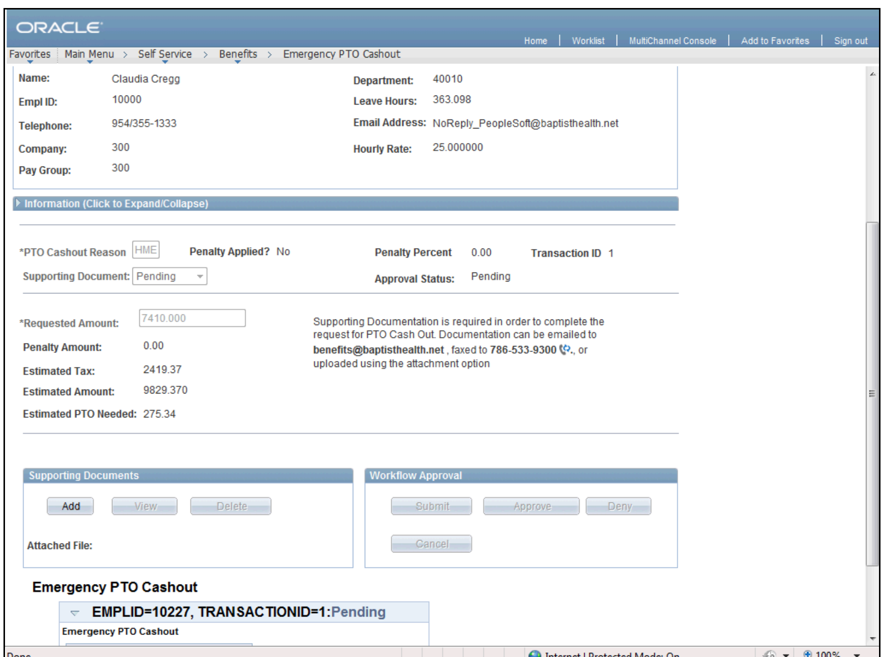
Step	Action
6.	Enter the desired dollar amount into the **Requested Amount** field.
7.	Before submitting your request, click the **Save** button. This will refresh the page to show the estimated PTO needed and, if applicable, the penalty and tax amount. 
8.	Before continuing, ensure you have enough PTO 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. 



Step	Action
10.	Click the **OK** button. 



Step	Action
11.	Click the **OK** button. 



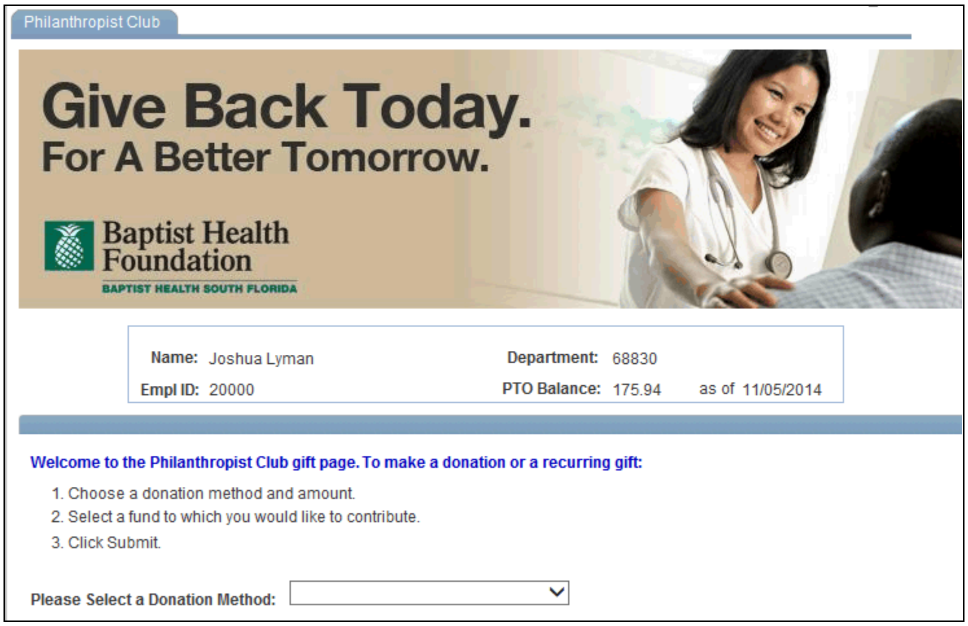
Step	Action
12.	Before your request can be approved, supporting documentation is required. You can upload your documentation on this page by clicking the Add button in the Supporting Documents section, or you can email or fax it to the above address and number.
13.	**Congratulations.** You have successfully submitted a request to cashout PTO for use in an emergency. **End of Procedure.**

Making Campaign Donations

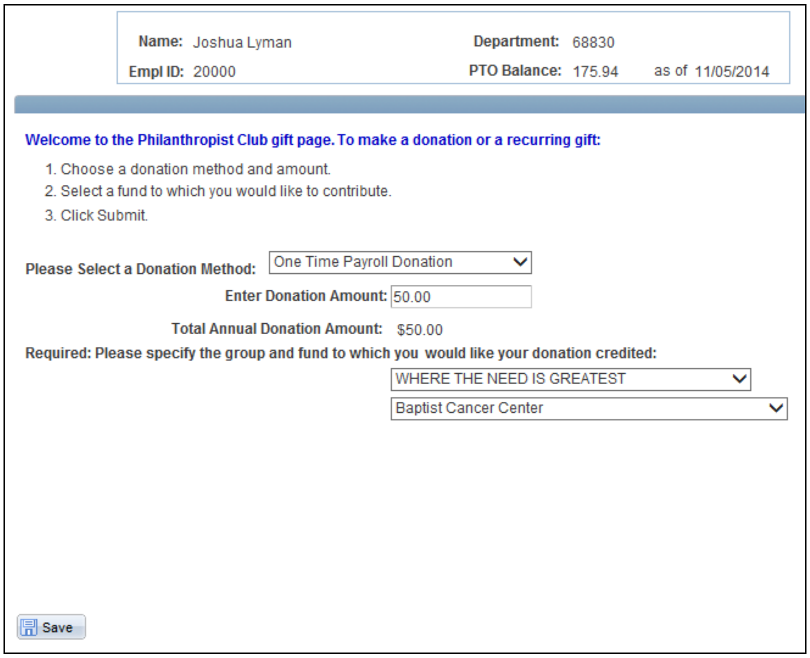
Making a Campaign Donation - Payroll Donation

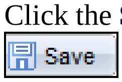
Navigation: Main Menu > HCM > Self Service > BH Donation Campaigns > Philanthropist Club

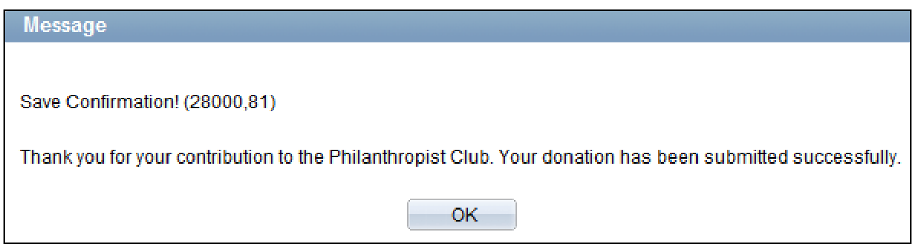
Purpose: Use this transaction to practice making a one time payroll donation to a campaign.

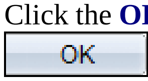


Step	Action
1.	Click the **Please Select a Donation Method** list.
2.	There are several donation methods available. In this example, click the **One Time Payroll Donation** list item. One Time Payroll Donation
3.	Enter the desired information into the **Enter Donation Amount** field.
4.	Click the **Group** list.
5.	Click the appropriate **Group** list item.
6.	Click the **Fund** list.
7.	Click the appropriate **Fund** list item.
8.	Scroll down the page.



Step	Action
9.	Click the **Save** button. 

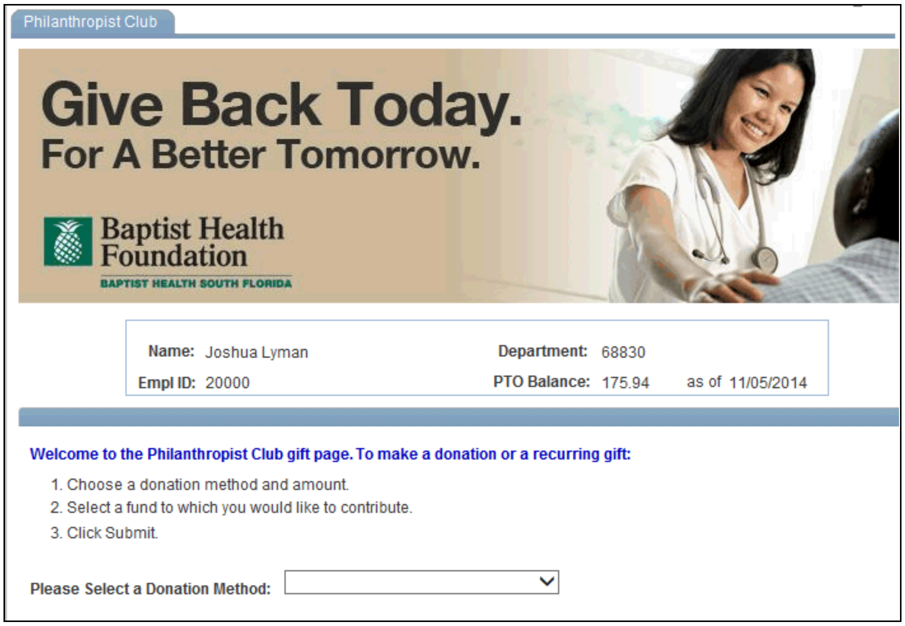


Step	Action
10.	Click the **OK** button. 
11.	Depending on timing, you may not see your donation reflected on your next paycheck.
12.	**Congratulations.** You have donated to a campaign with a one time payroll deduction. **End of Procedure.**

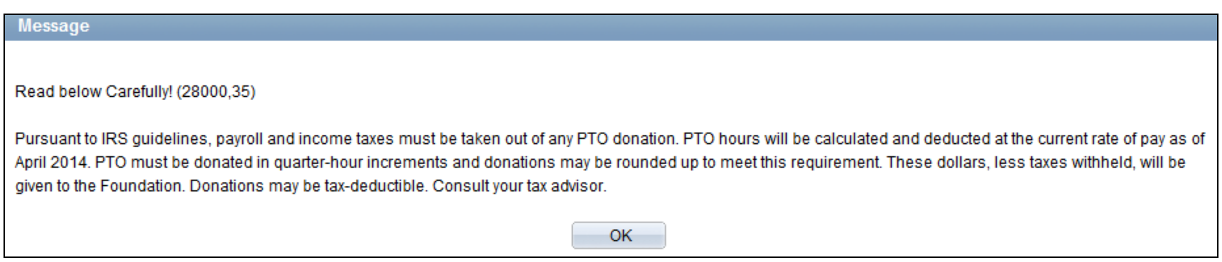
Making a Campaign Donation - Paid Time Off Donation

Navigation: Main Menu > HCM > Self Service > BH Donation Campaigns > Philanthropist Club

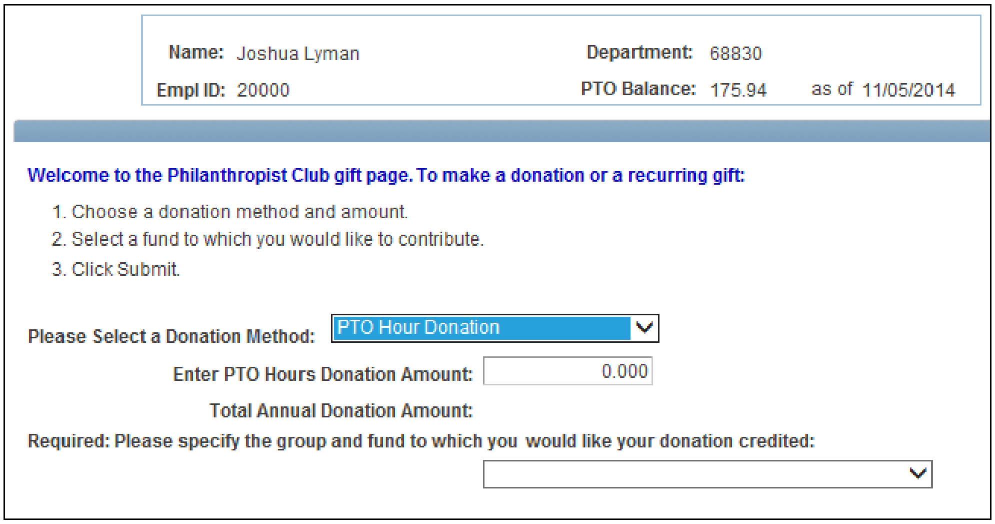
Purpose: Use this transaction to practice donating PTO to a campaign.



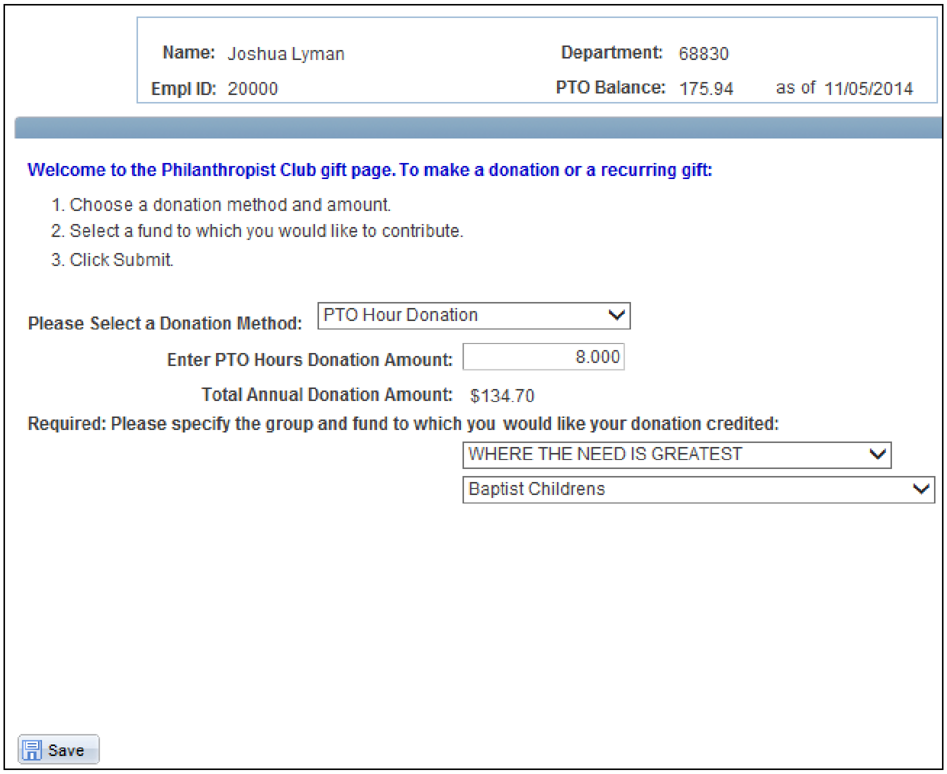
Step	Action
1.	Click the **Please Select a Donation Method** list.
2.	There are two ways you can donate PTO: by hour or by dollar equivalent. Select PTO Hour Donation to enter a number of hours you would like to donate. The system will calculate the donation amount based on the hours. Select PTO Dollar 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. PTO Hour Donation

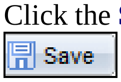
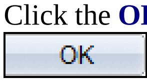


Step	Action
4.	When donating PTO, an important message regarding taxes is shown. Read this message carefully.
5.	Click the **OK** button. 



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.

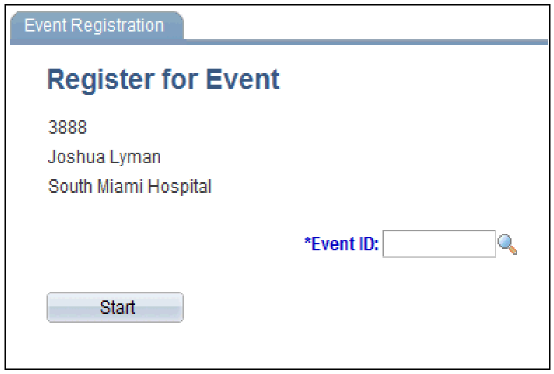


Step	Action
14.	Click the **Save** button. 
15.	Click the **OK** button. 
16.	**Congratulations.** You have donated to a campaign using PTO. **End of Procedure.**

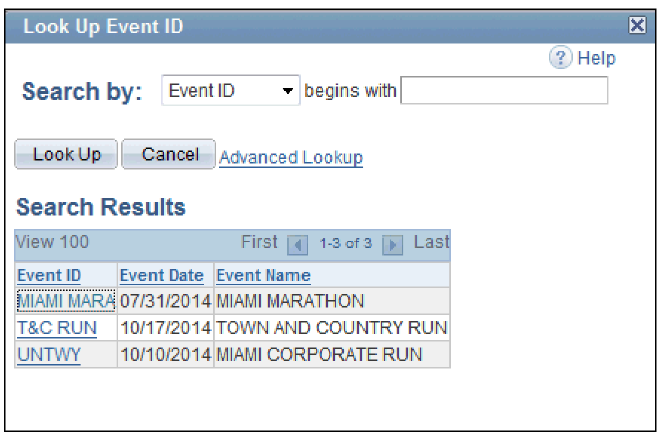
Registering for Events

Navigation: Main Menu > HCM > Self Service > BHSF Event Registration > Register for Events

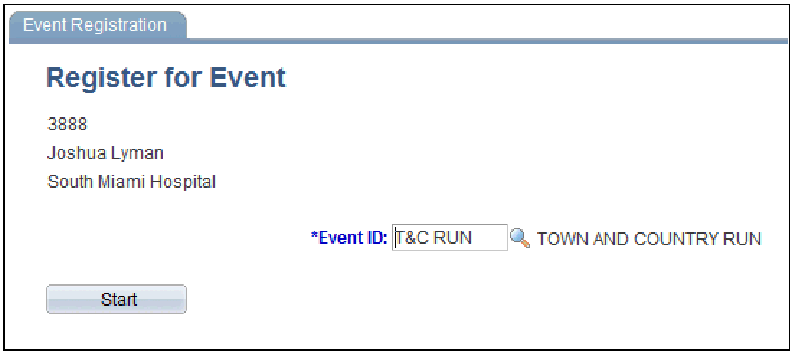
Purpose: Use this transaction to practice registering for events.



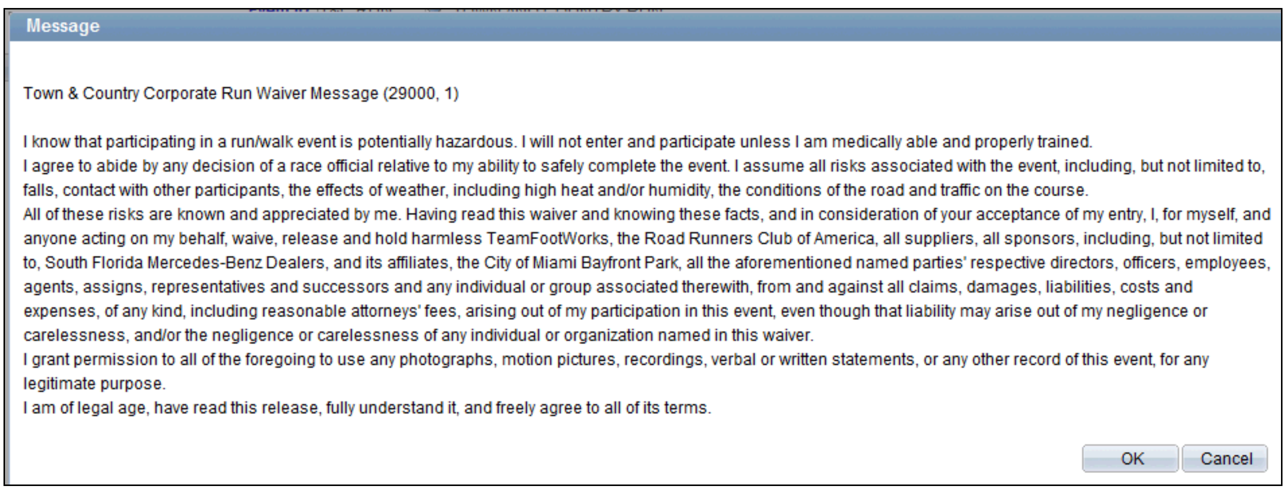
Step	Action
1.	Use the Register for Event page to select an event, enter your information, and complete event registration.
2.	Click the **Look up Event ID (Alt+5)** button. 



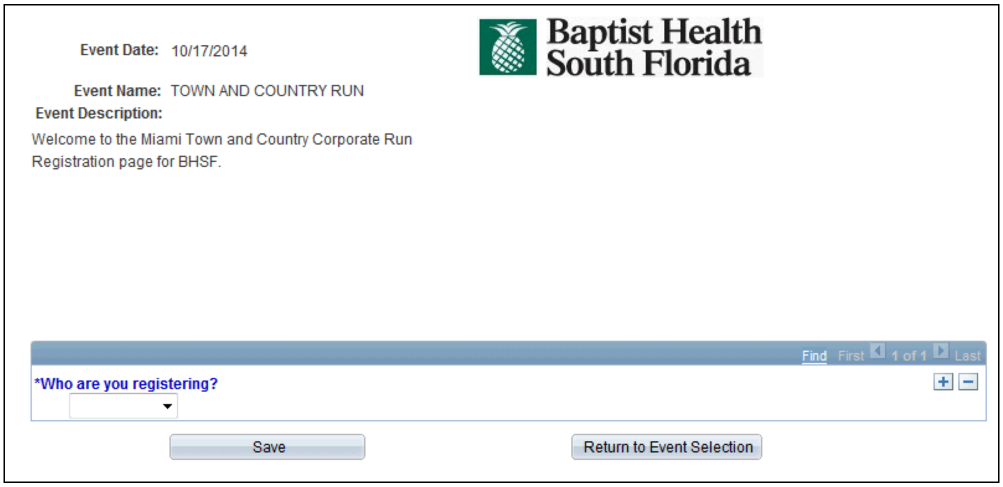
Step	Action
3.	Click the appropriate **Event ID** link.



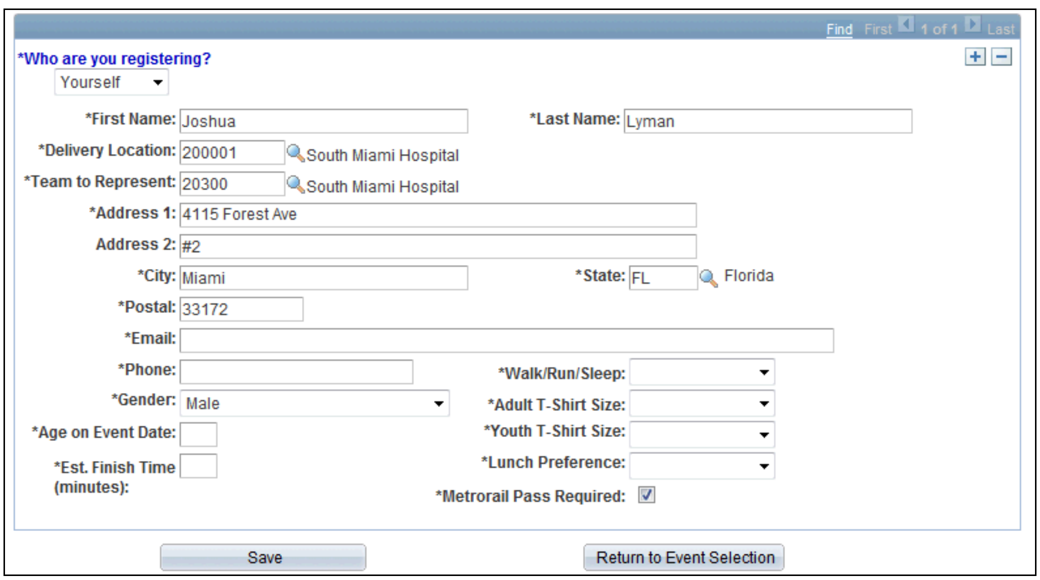
Step	Action
4.	Click the **Start** button. Start



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. OK

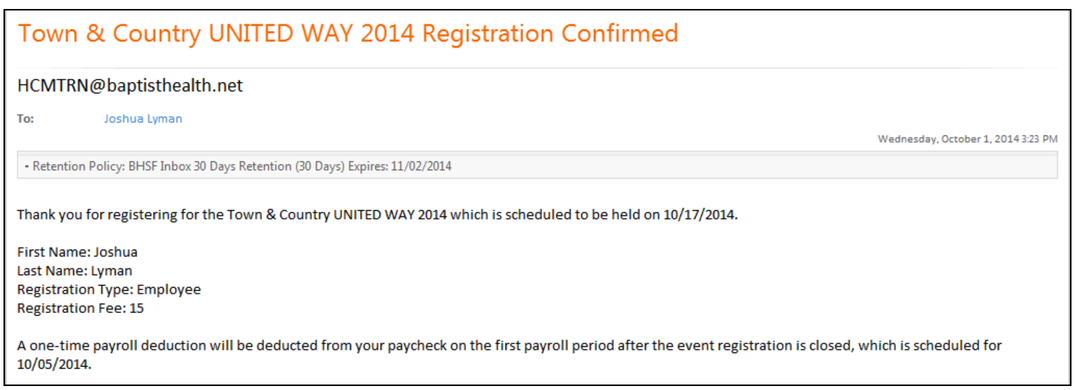


Step	Action
7.	Click the button to the right of the **Who are you registering?** field.
8.	Click the appropriate **Person** list item.



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. NA
24.	Click the **Save** button. Save
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).


Town & Country UNITED WAY 2014 Registration Confirmed

HCMTRN@baptisthealth.net

To: Joshua Lyman

Wednesday, October 1, 2014 3:23 PM

- Retention Policy: BHSF Inbox 30 Days Retention (30 Days) Expires: 11/02/2014

Thank you for registering for the Town & Country UNITED WAY 2014 which is scheduled to be held on 10/17/2014.

First Name: Joshua
Last Name: Lyman
Registration Type: Employee
Registration Fee: 15

A one-time payroll deduction will be deducted from your paycheck on the first payroll period after the event registration is closed, which is scheduled for 10/05/2014.

Step	Action
26.	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. Any registration fees will be paid through a one time payroll deduction.
27.	**Congratulations.** You have registered for an event. **End of Procedure.**

Managing Travel Authorizations and Expenses

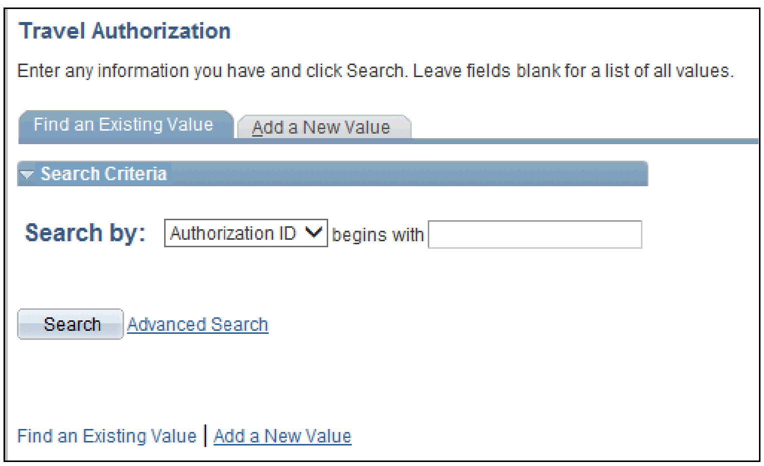
Creating a Travel Authorization

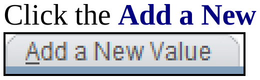
Navigation: Main Menu > FSCM > Employee Self-Service > Travel and Expenses Center > Click the Create link under Travel Authorization

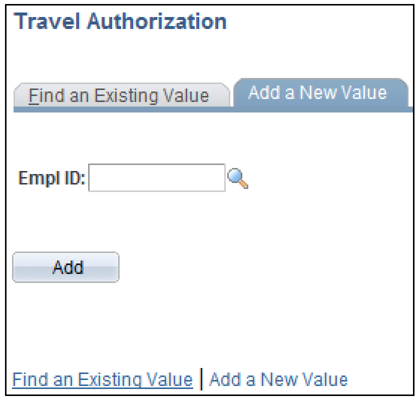
Purpose: Use this transaction to practice creating a travel authorization.

Note: Refer to BHSF Travel and Expense policies for specific requirements.

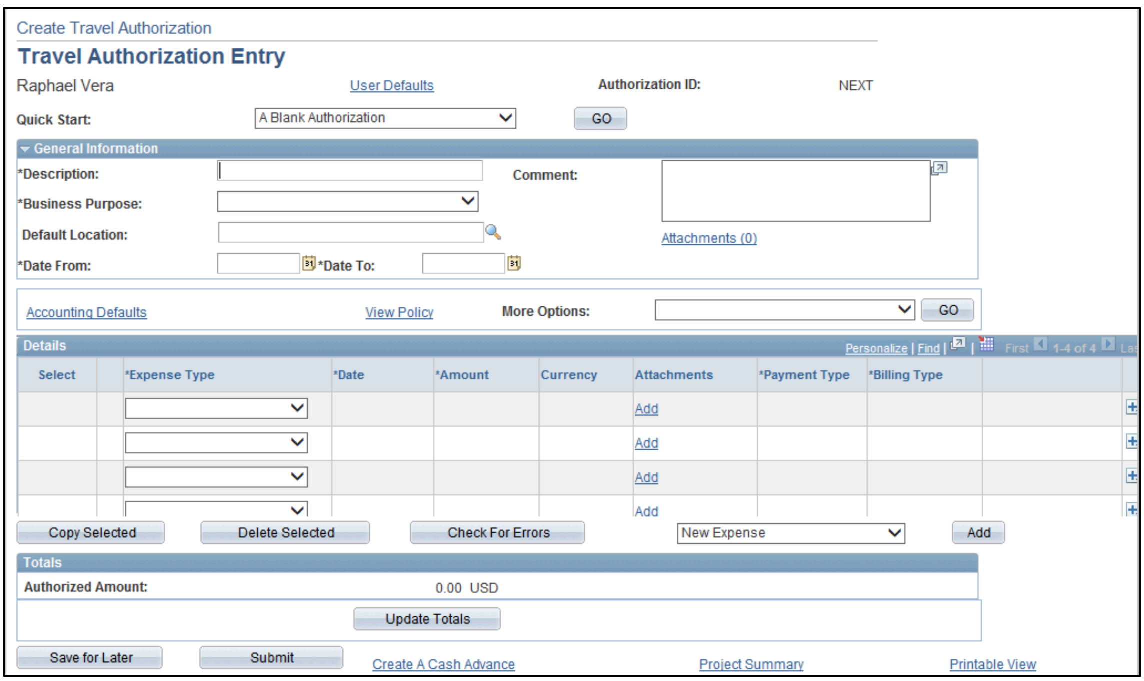
Step	Action
1.	Use this page to search for an existing travel authorization or create a new one. In this example, you will create a new travel authorization.



Step	Action
2.	Click the **Add a New Value** tab. 

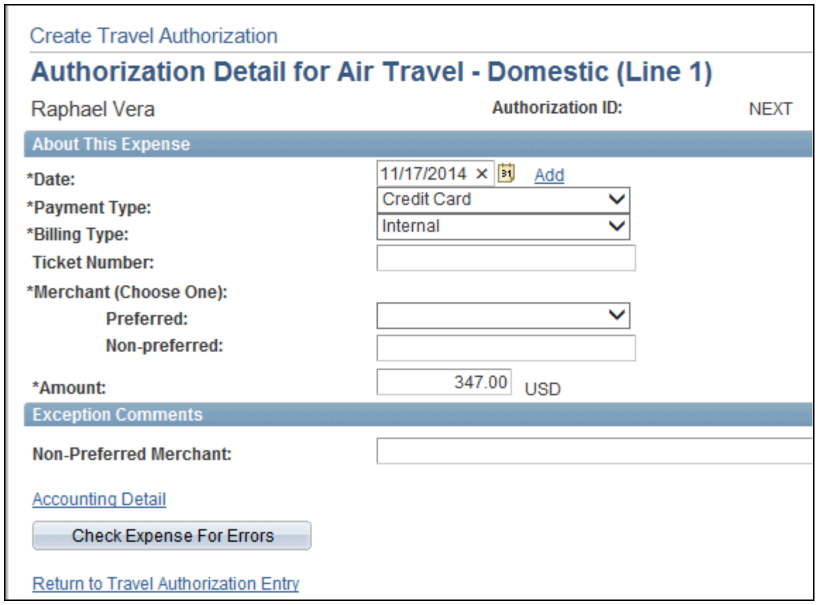


Step	Action
3.	Enter the desired information into the **Empl ID** field. For example, enter "**29669**".
4.	Click the **Add** button. Add

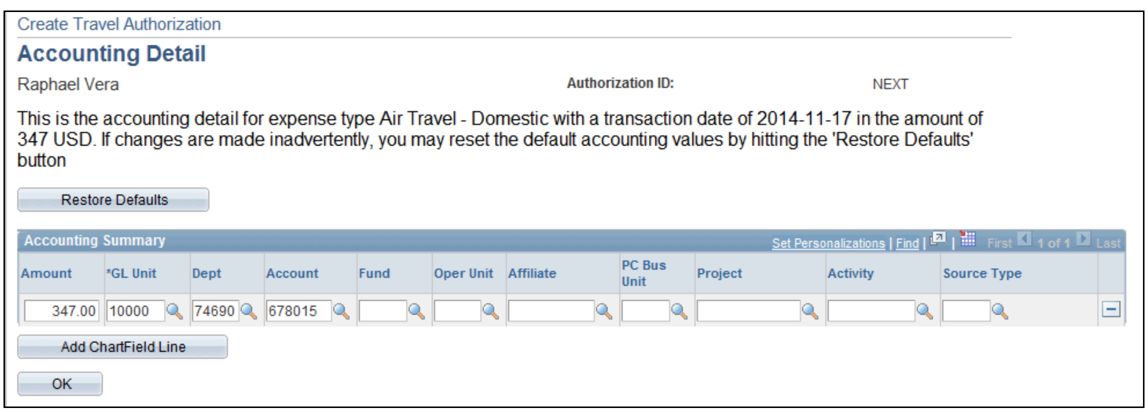


Step	Action
5.	Click the button to the right of the **Quick Start** field.

Step	Action
6.	There are several options when creating a travel authorization, including: - 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. In this example, you will create a Blank Authorization.
7.	Click the **A Blank Authorization** list item. A Blank Authorization
8.	Click in the **Description** field.
9.	Click the button to the right of the **Business Purpose** field.
10.	Click the appropriate **Business Purpose** list item. Continuing Medical Education
11.	Enter the desired information into the **From Date** field.
12.	Enter the desired information into the **To Date** field.
13.	Click the **Expense Type** list.
14.	Click the appropriate **Expense Type** list item.
15.	Enter the desired information into the **Expense Date** field.
16.	Enter the desired information into the Expense **Amount** field.
17.	Click the **Payment Type** list.
18.	Click the appropriate **Payment Type** list item.
19.	Click the **Detail** link to enter additional information regarding the selected expense type. *Detail

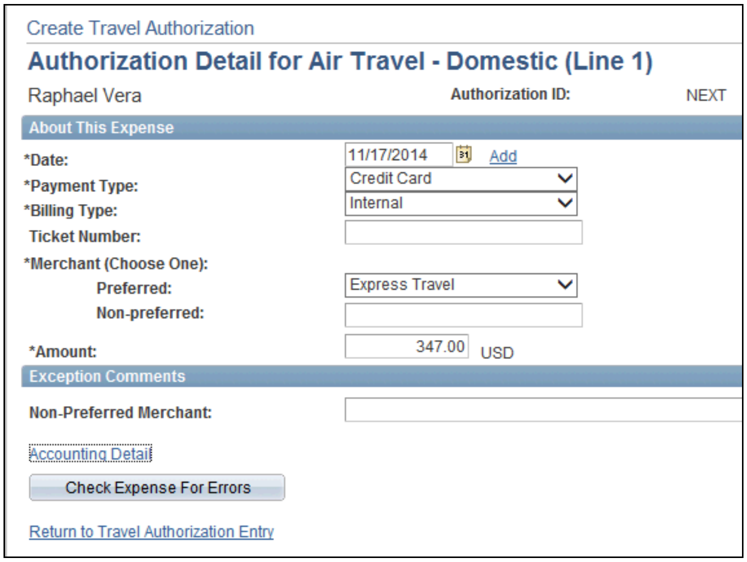


Step	Action
20.	Click the button to the right of the **Preferred** field. 
21.	Click the appropriate **Merchant Preferred** list item.
22.	Click the **Accounting Detail** link. 

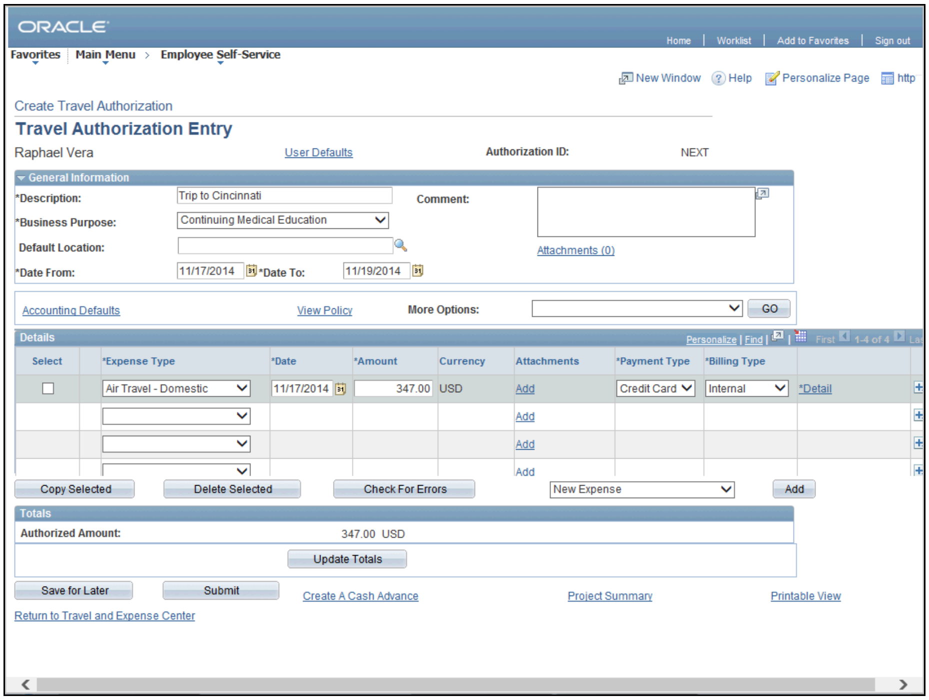


Step	Action
23.	Use the Accounting Details page to view or edit ChartFields. Expense items are charged to a set of ChartFields that represent the business unit or department of the employee who is submitting the expense report.

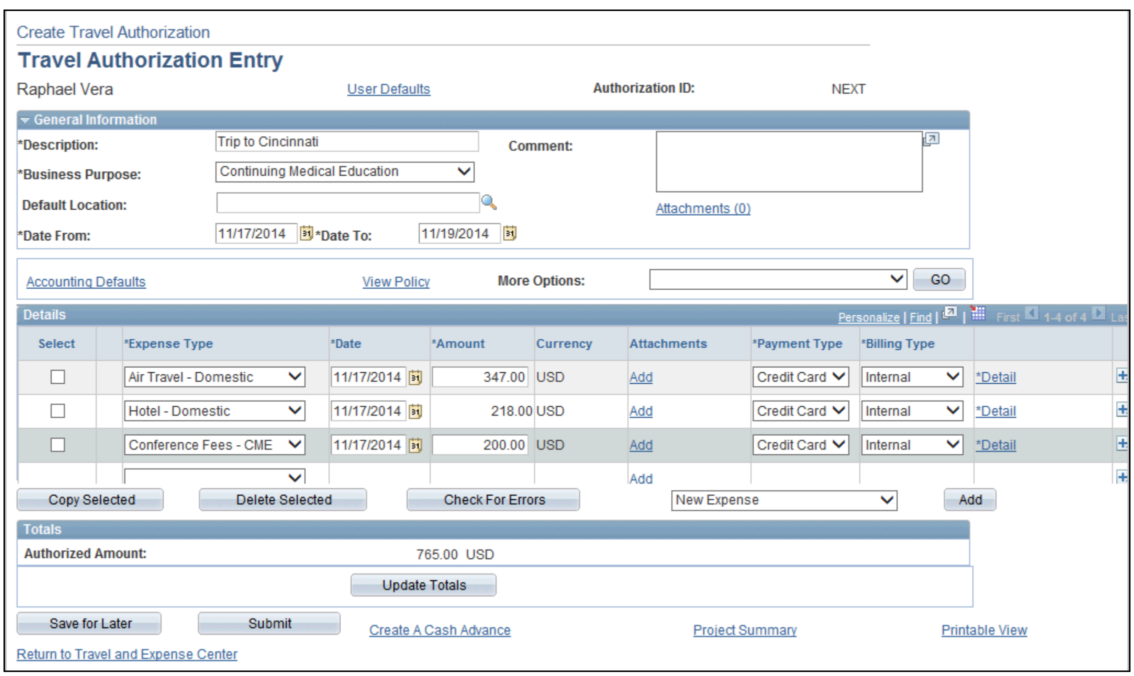
Step	Action
24.	Click the **OK** button. OK



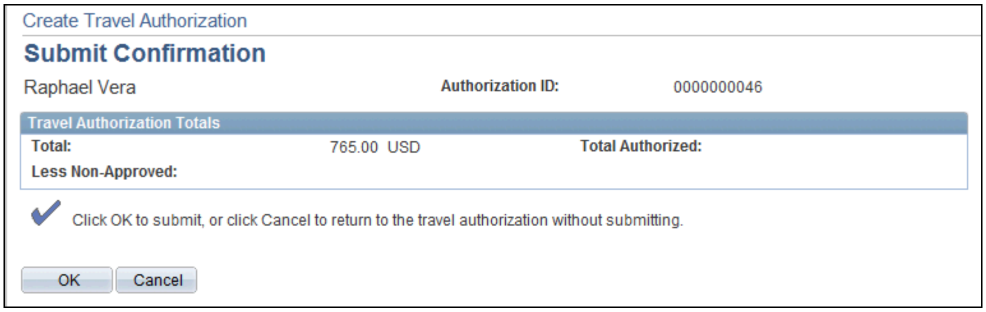
Step	Action
25.	Before continuing, click the **Check Expense For Errors** button. This will allow you to check and correct errors before submitting for review. Check Expense For Errors
26.	Click the **Return to Travel Authorization Entry** link to continue. Return to Travel Authorization Entry



Step	Action
27.	For each additional expense, repeat steps 14-27.



Step	Action
28.	If you are not prepared to submit your Travel Authorization at this time, click the **Save for Later** button. Save for Later
29.	Click the **Submit** button. Submit



Step	Action
30.	Click the **OK** button. OK
31.	**Congratulations.** You have created a travel authorization. **End of Procedure.**

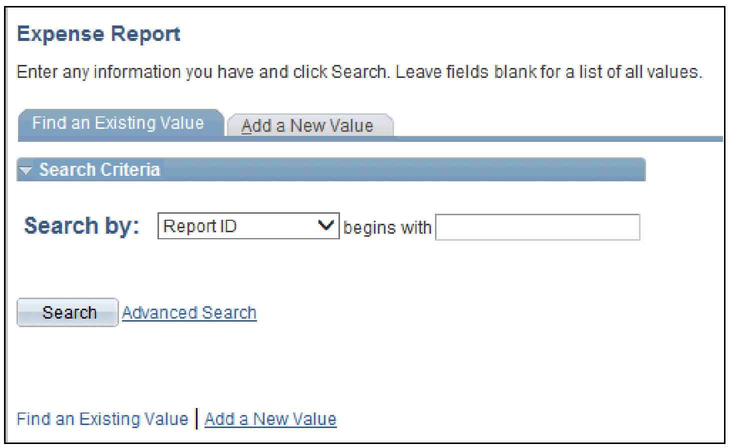
Creating a Blank Expense Report

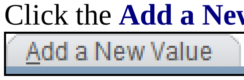
Navigation: Main Menu > FSCM > Employee Self Service > Travel and Expense Center > Click the Create link under Expense

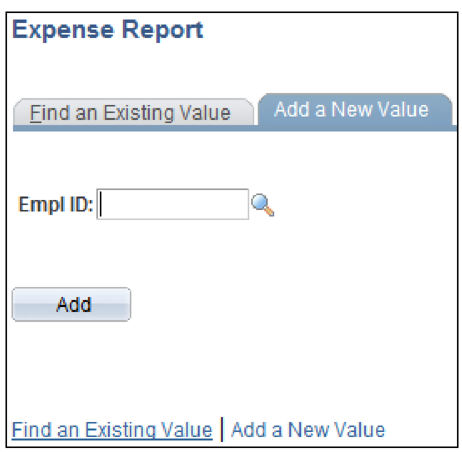
Purpose: Use this transaction to practice creating a blank expense report.

Note: Refer to BHSF Travel and Expense policies for specific requirements.

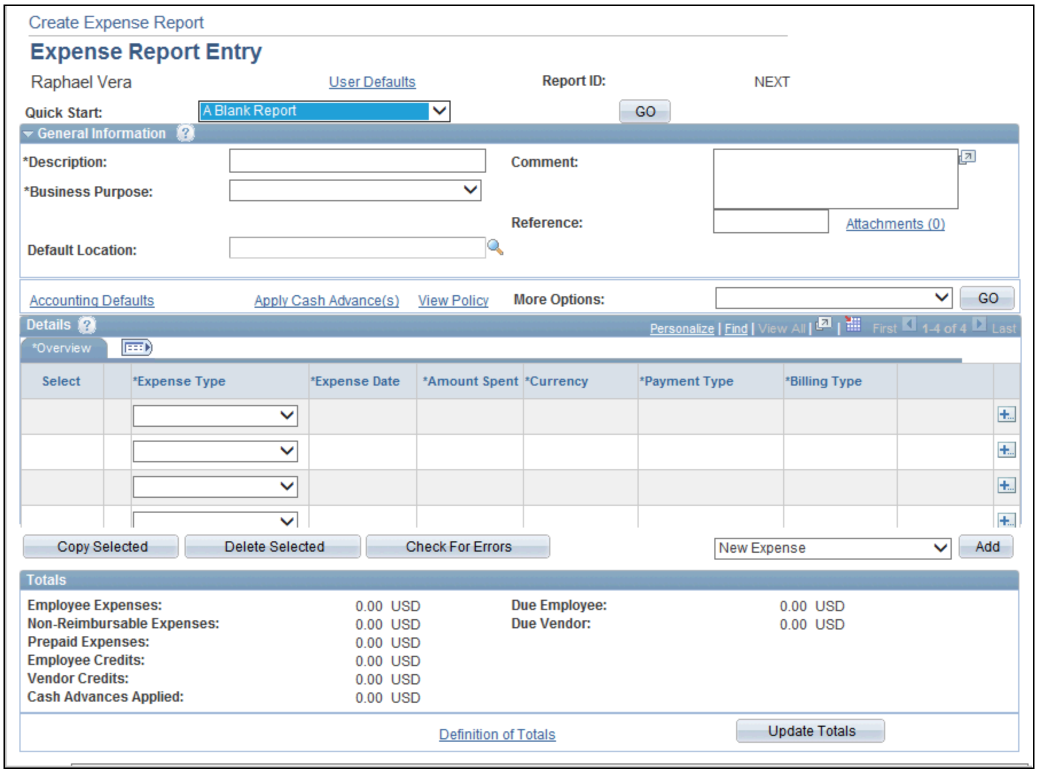
Step	Action
1.	Use this page to search for an existing expense report or add a new expense report. In this example, you will create a new expense report.



Step	Action
2.	Click the **Add a New Value** tab. 

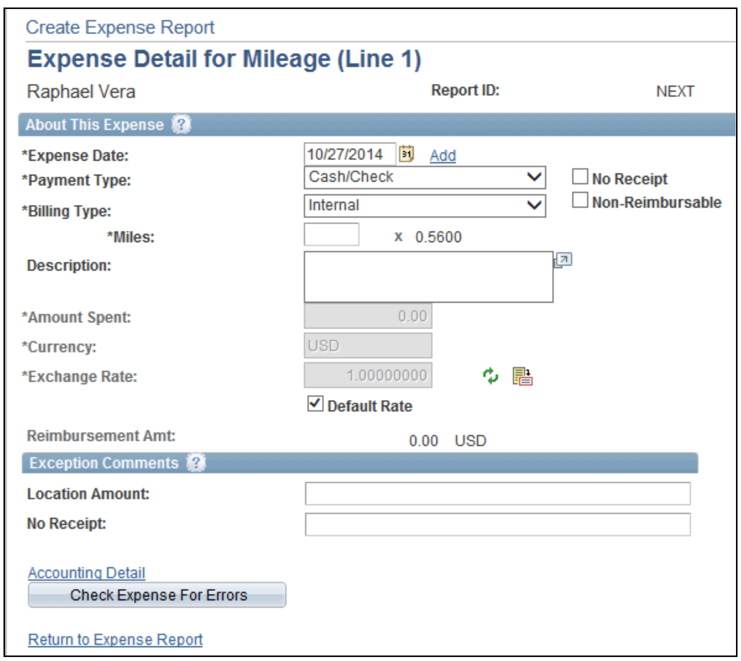


Step	Action
3.	Enter the desired information into the **Empl ID** field.
4.	If you do not know your Employee ID, you can click the Search button to search and select your ID number.
5.	Click the **Add** button. 



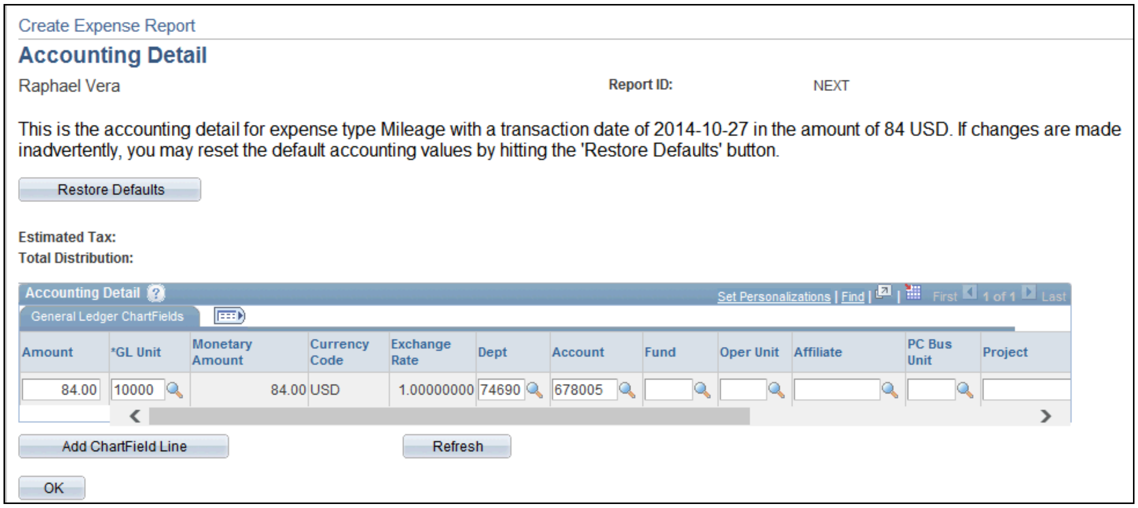
Step	Action
6.	Click the button to the right of the **Quick Start** field. 
7.	There are several options when creating an expense report, including: - A Template: Select to create an expense report from an existing template. - A Travel Authorization: Select to create an expense report based on a travel 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. In this example, you will create a Blank Report.
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. Mileage
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. Cash/Check
18.	Click the **Detail** link to enter details regarding the expense incurred. *Detail

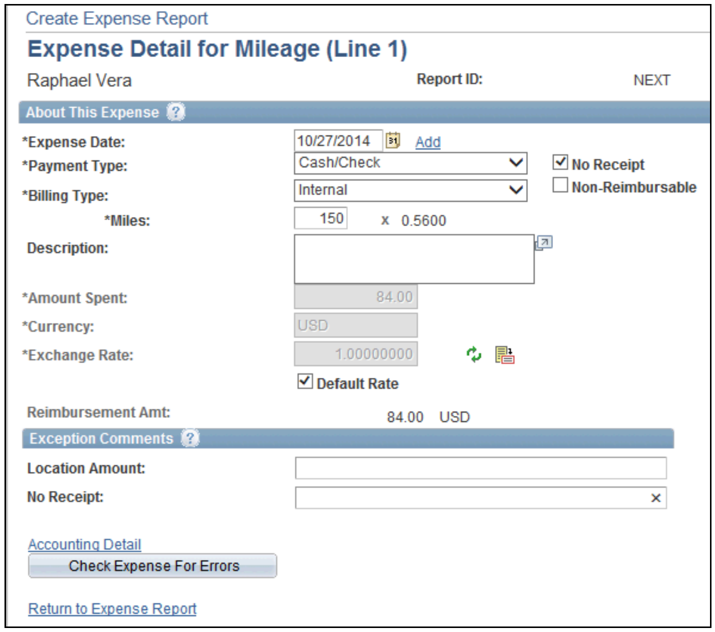


Step	Action
19.	Enter the desired information into the **Miles** field.
20.	Click the **No Receipt** option.

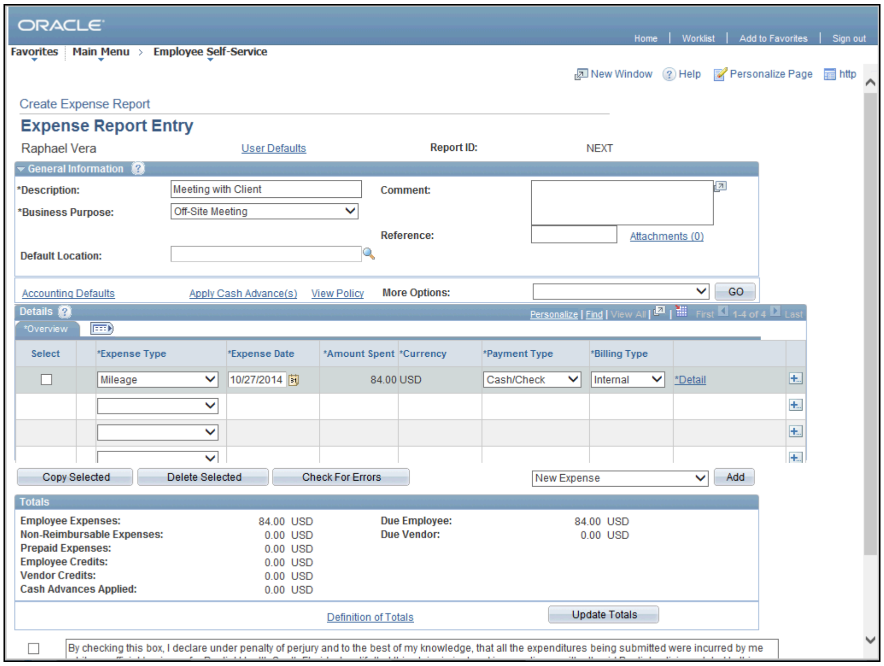
Step	Action
21.	Click the **Accounting Detail** link. Accounting Detail



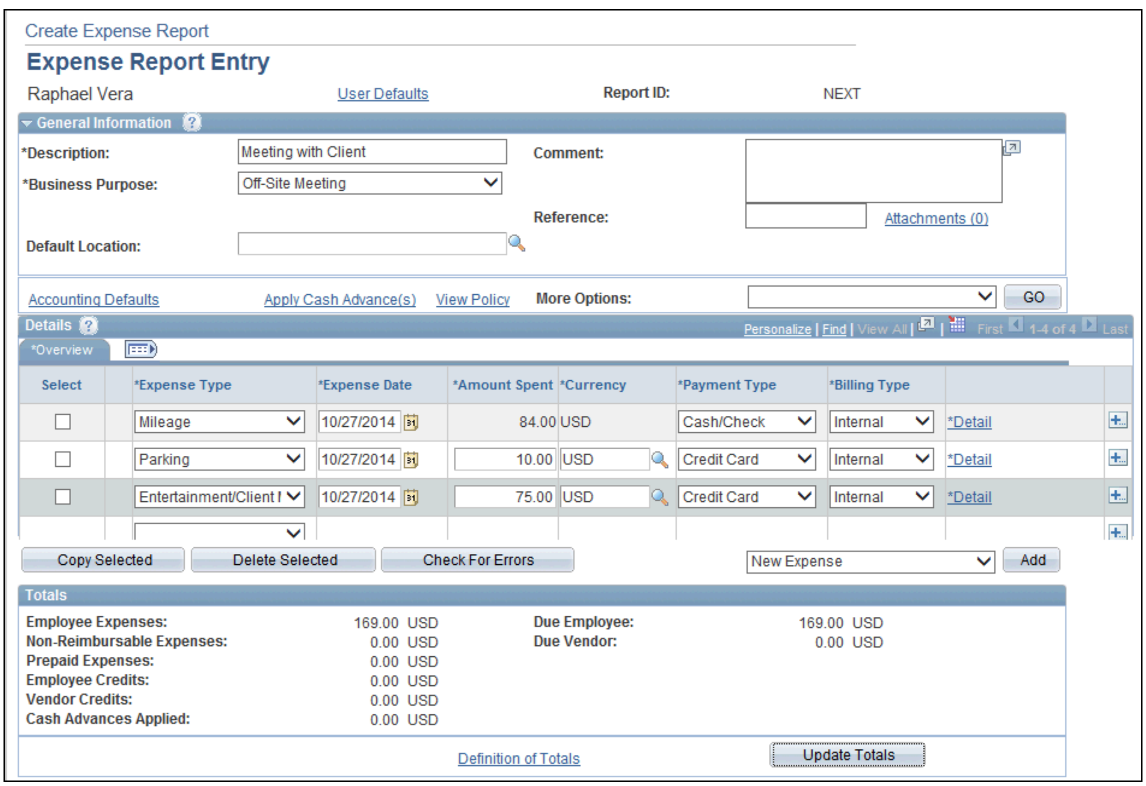
Step	Action
22.	Use the Accounting Details page to view or edit ChartFields. Expense items are charged to a set of ChartFields that represent the business unit or department of the employee who is submitting the expense report.
23.	Click the **OK** button. OK



Step	Action
24.	Before continuing, click the **Check Expense For Errors** button. This will allow you to check and correct errors before submitting for review. Check Expense For Errors
25.	No errors were found. Click the **Return to Expense Report** link to continue. Return to Expense Report

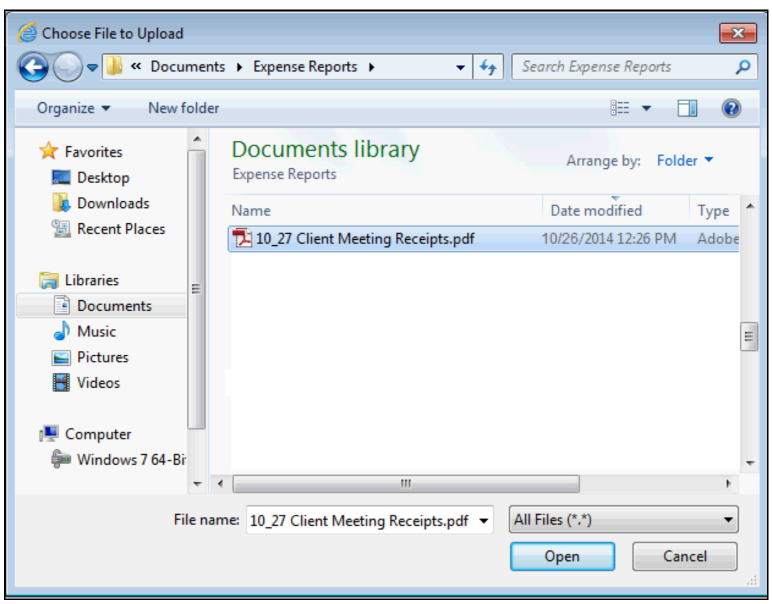


Step	Action
26.	For each additional expense, repeat steps 12-25.

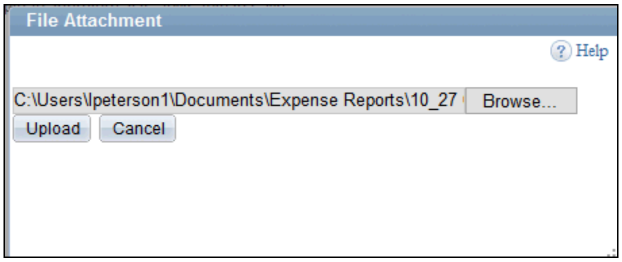


Step	Action
27.	After adding all expenses, you need to attach your receipts to the report. Click the **Attachments** link. Attachments (0)

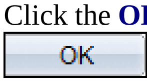
Step	Action
28.	Click the **Add Attachment** button. Add Attachment
29.	Click the **Browse** button. Browse...

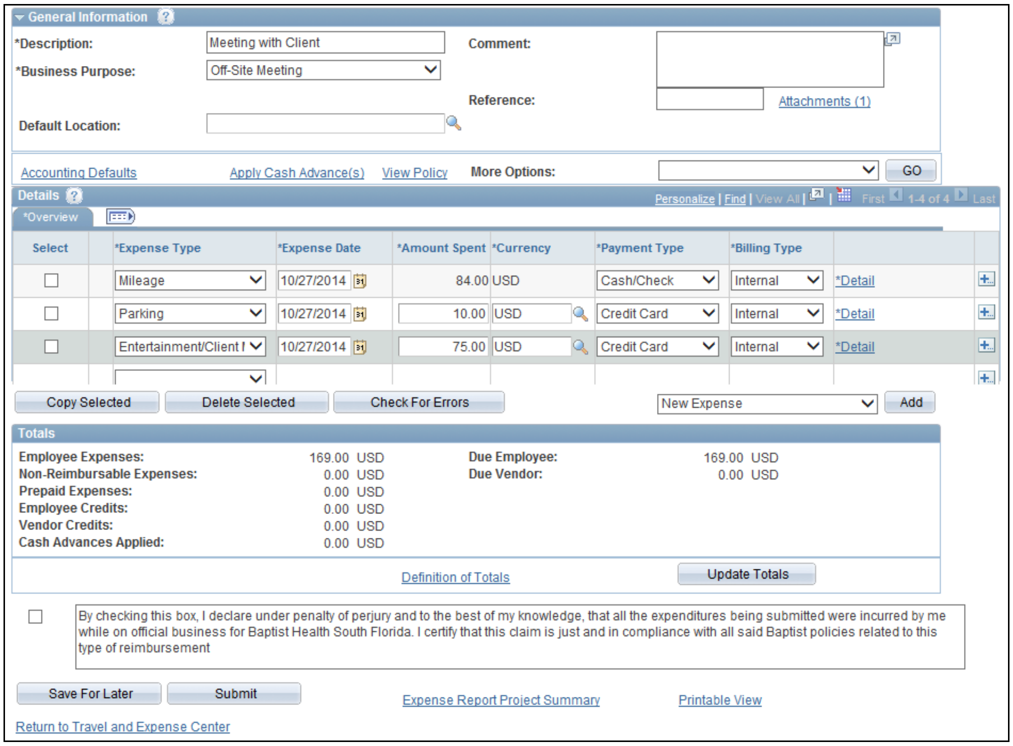


Step	Action
30.	Click the appropriate **File Name** list item.
31.	Click the **Open** button. Open

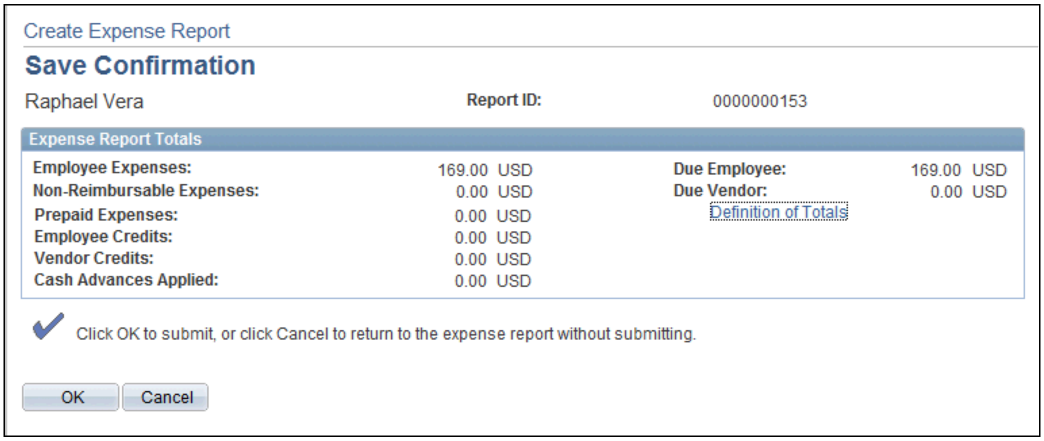


Step	Action
32.	Click the **Upload** button. 

Step	Action
33.	Enter the desired information into the **Description** field.
34.	Click the **OK** button. 



Step	Action
35.	If you would like to save and return to the expense report at another time, click the **Save For Later** button. Save For Later
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. ☐
37.	Click the **Submit** button. Submit



Step	Action
38.	Click the **OK** button. 
39.	**Congratulations.** You have created and submitted an expense report. **End of Procedure.**

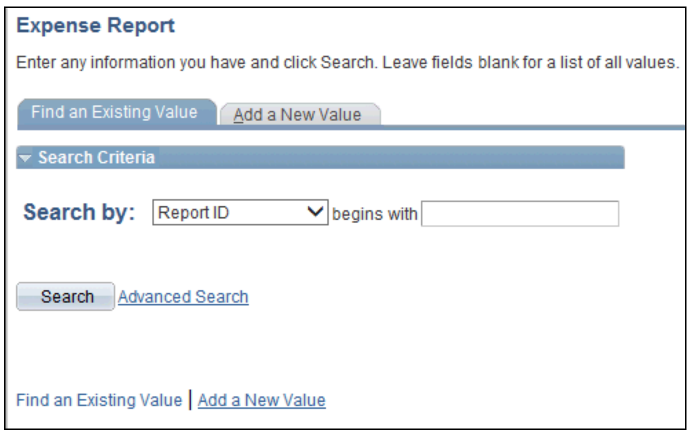
Creating an Expense Report from a Travel Authorization

Navigation: Main Menu > FSCM > Employee Self Service > Travel and Expense Center > Click the Create link under Expense

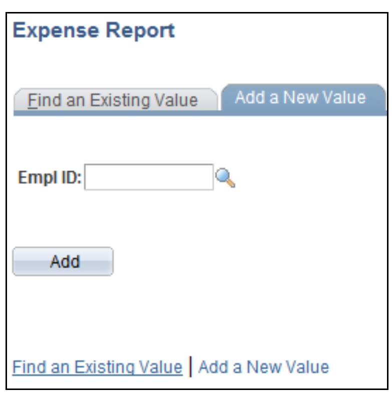
Purpose: Use this transaction to practice creating an expense report from a travel authorization.

Note: Refer to BHSF Travel and Expense policies for specific requirements.

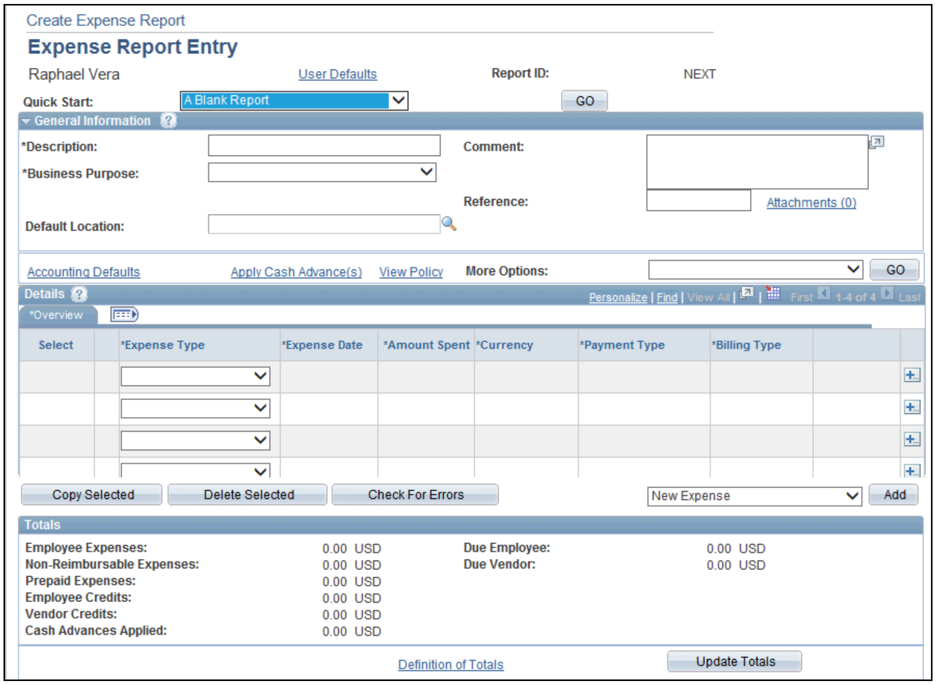
Step	Action
1.	Use this page to search for an existing expense report or add a new expense report. In this example, you will create a new expense report.



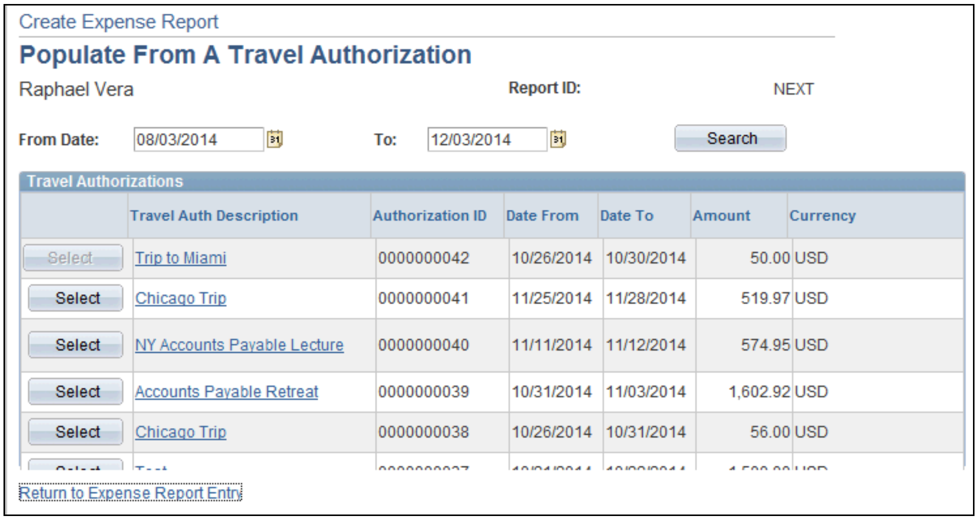
Step	Action
2.	Click the **Add a New Value** tab. Add a New Value



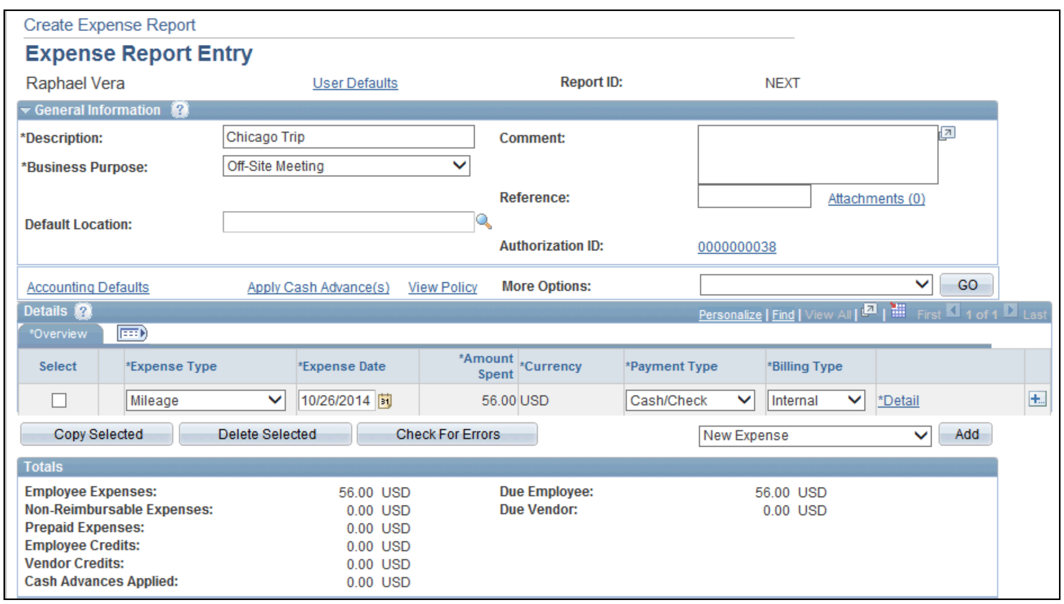
Step	Action
3.	Enter the desired information into the **Empl ID** field.
4.	If you do not know your Employee ID, you can click the Search button to search and select your ID number.
5.	Click the **Add** button. Add



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: - 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. In this example, you will create an expense report for a travel authorization.
8.	Click the **A Travel Authorization** list item. A Travel Authorization
9.	Click the **GO** button. GO

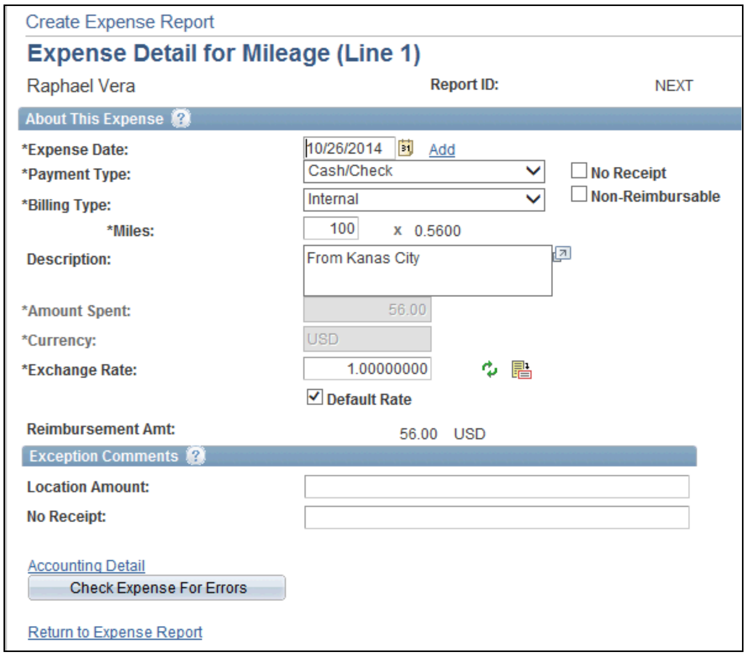


Step	Action
10.	Click the **Select** button to the left of the appropriate Travel Authorization. Note, you must select a travel authorization for a past trip. Select

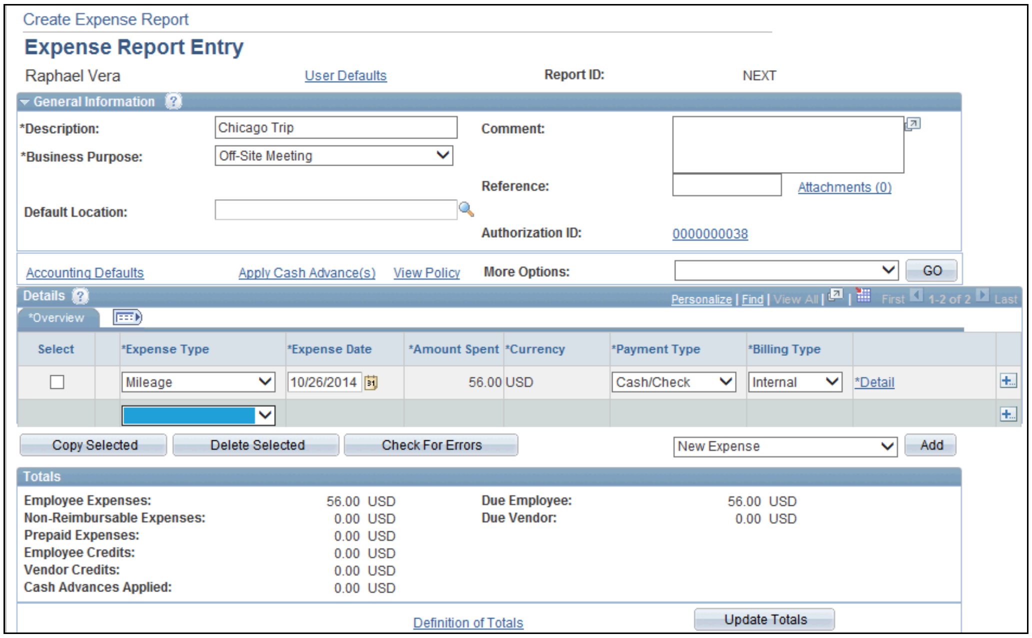


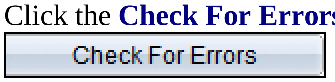
Step	Action
11.	Click the **Detail** link to view details regarding the expense incurred. *Detail

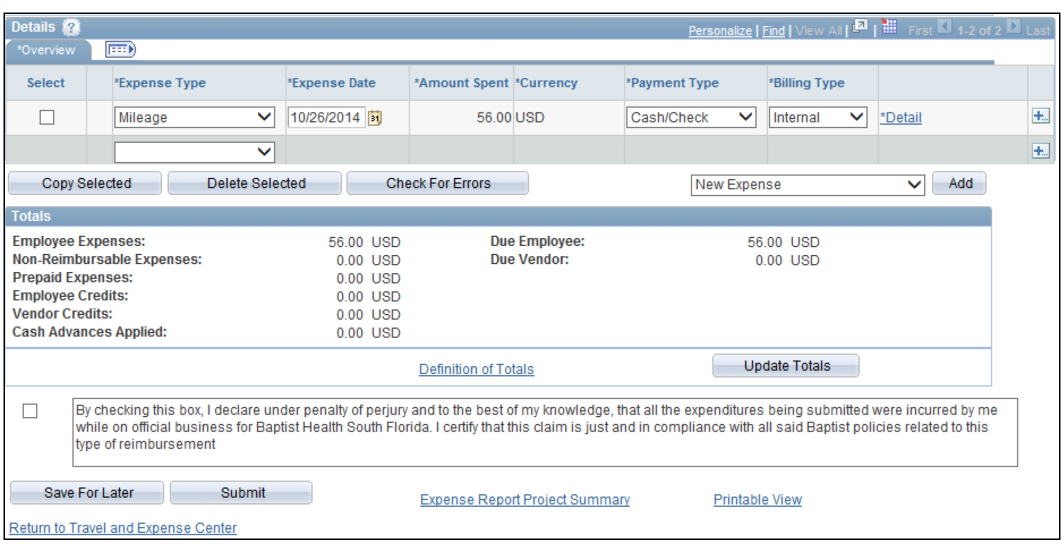
Step	Action
12.	Use the Expense Detail page to review the expenses for the selected line. The information on this page is populated with the information provided in the Travel Authorization for the trip. Should your actual expenses differ from the Travel Authorization, make any edits on this page. For example, if you drove 150 miles instead of 100 miles, update the Miles field.



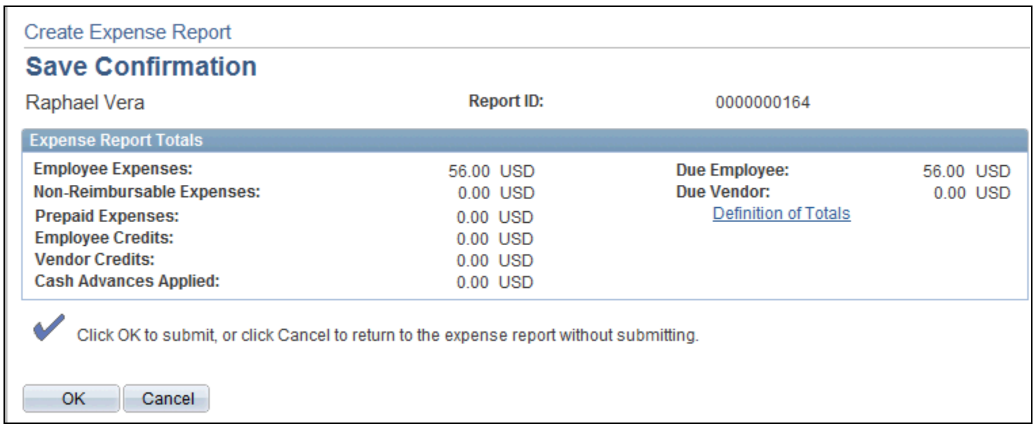
Step	Action
13.	Click the **Return to Expense Report** link. Return to Expense Report



Step	Action
14.	Click the **Check For Errors** button. 
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.



Step	Action
17.	If you would like to save and return to the expense report at another time, click the **Save For Later** button. Save For Later
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.
19.	Click the **Submit** button. Submit



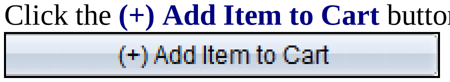
Step	Action
20.	Click the **OK** button. OK
21.	**Congratulations.** You have created an expense report from a travel authorization. **End of Procedure.**

Baptist Health Market

Placing an Order

Navigation: Main Menu > FSCM > Self Service > Baptist Health Market > Baptist Heallth Market

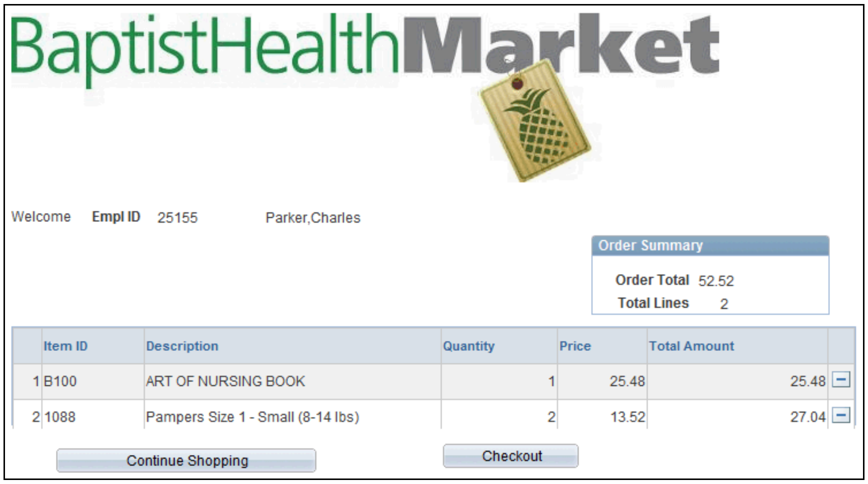
Purpose: Use this transaction to practice placing an order in Baptist Health Market.

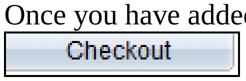
Step	Action
1.	Click the button to the right of the **Select Category** field.
2.	Click the appropriate **Category** list item.
3.	Note, a UOM (or unit of measure) is assigned to all inventory items and is a measure of quantity. For example, you may purchase an item by the case and within each case, 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.

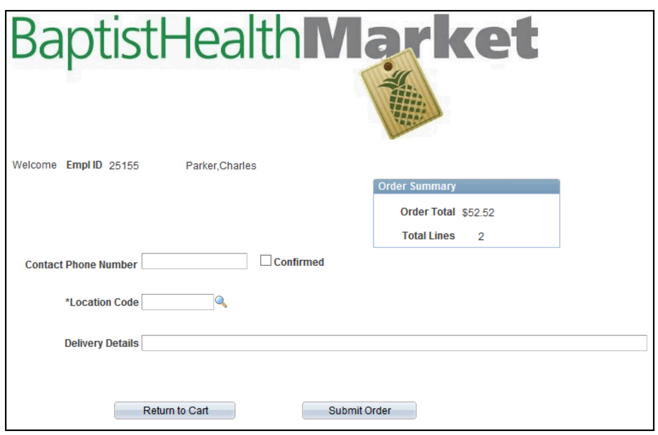
Step	Action
8.	Click the **Continue Shopping** button. 

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.

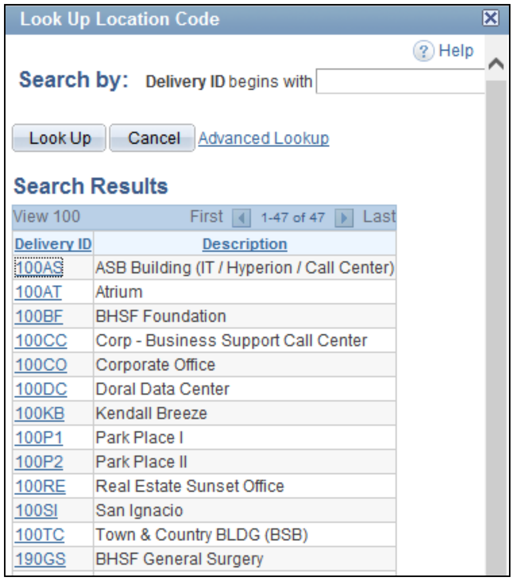
Step	Action
14.	Click the **(+) Add Item to Cart** button. 
15.	Notice your Order Summary has been updated to reflect the new item.



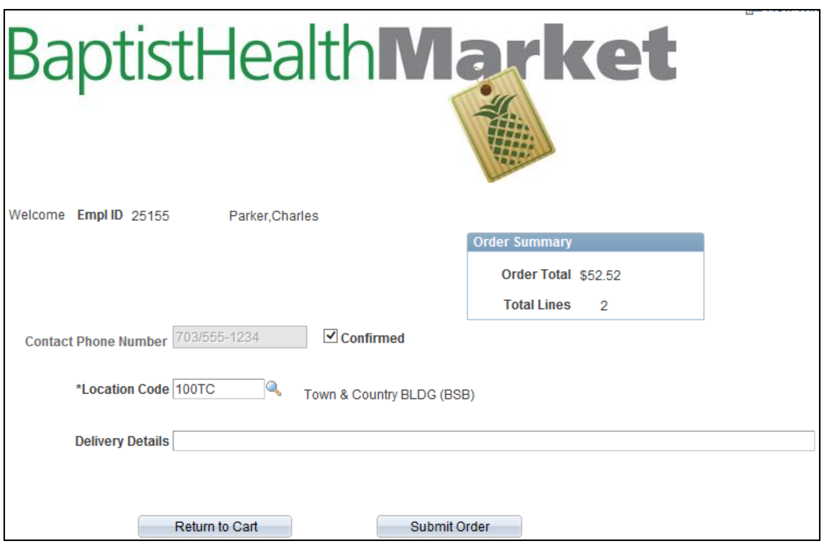
Step	Action
16.	Once you have added all items to your cart, click the **Checkout** button. 

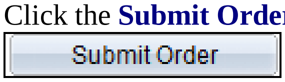


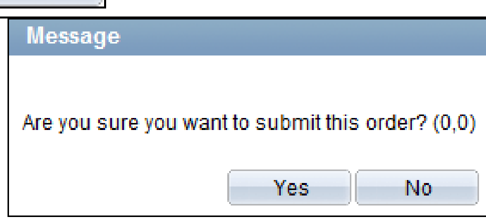
Step	Action
17.	Enter the desired information into the **Contact Phone Number** field.
18.	Click the **Confirmed** option. 
19.	Click the **Look up Location Code (Alt+5)** button. 

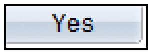


Step	Action
20.	Click the appropriate **Delivery ID** link.



Step	Action
21.	Enter the desired information into the **Delivery Details** field.
22.	Click the **Submit Order** button. 

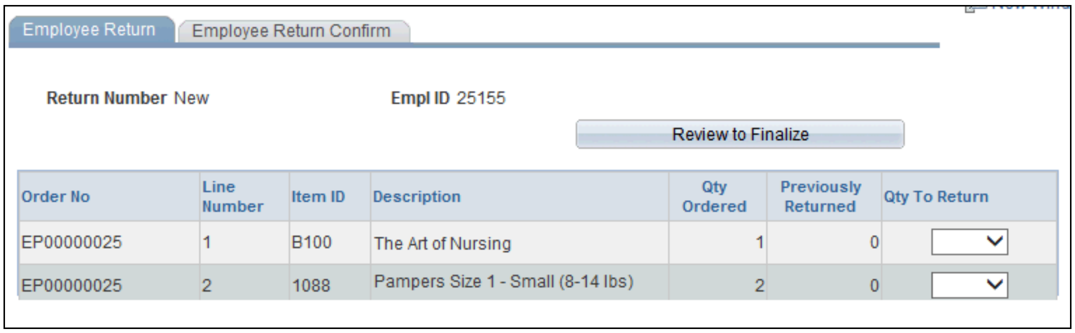


Step	Action
23.	Click the **Yes** button. 
24.	Note, only unopened items may be returned within 90 days of the order date.
25.	**Congratulations.** You have placed an order in the Baptist Health Market. **End of Procedure.**

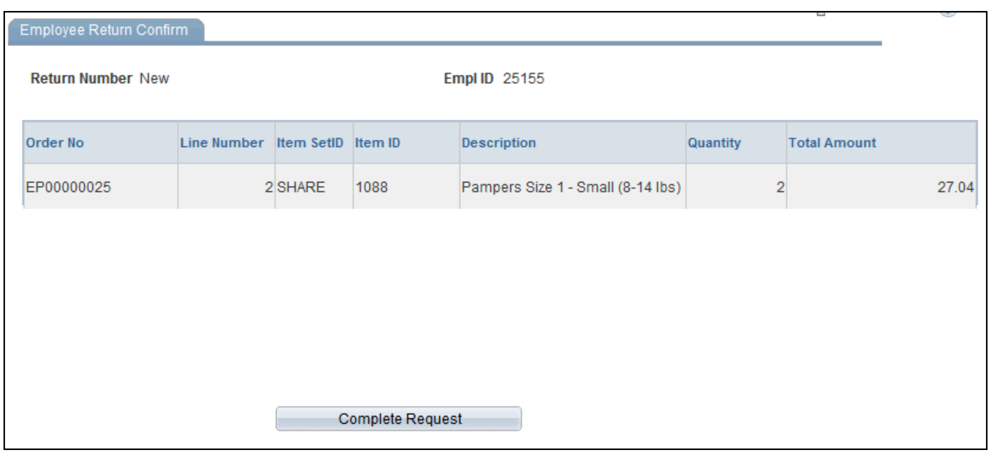
Returning Merchandise

Navigation: Main Menu > FSCM > Self Service > Baptist Health Market > Return Merchandise

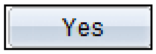
Purpose: Use this transaction to practice returning an item(s) you purchased from Baptist Health Market.



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.
2.	Click the appropriate **Quantity** list item.
3.	Click the **Review to Finalize** button. Review to Finalize



Step	Action
4.	Click the **Complete Request** button. 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.**