PeopleSoft HCM Update and Roadmap

Robbin Velayedam
Senior Director, PeopleSoft HCM Product Strategy

robbin.velayedam@oracle.com

@islander33

PeopleSoft
RECONNECT
July 16 - 18, 2019 ◆ Rosemont, IL

ORACLE

Safe Harbor Statement

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, timing, and pricing of any features or functionality described for Oracle's products may change and remains at the sole discretion of Oracle Corporation.

Come Meet the PeopleSoft HCM Strategy Team

Tuesday - Networking Lunch - 11:45 – 1:00 pm	• Human Resources Position Management, Profile Management • Payroll for North America • Employee Questionnaire, Acknowledgement Framework • Absence Management
Tuesday - HCM User Connections – 3:30 – 4:30 pm	International Ballroom A
Tuesday - HCM Strategy Team Meet & Greet – 4:30 – 5:30 pm	Red Bar Lounge
Tuesday – Quest Networking Reception - 5:30– 7:00pm	Exhibitor Hall
Wednesday - Speed Networking - 9:15 am – 10:45 am	Grand Ballroom H
Wednesday - Networking Lunch - 12:15 – 1:30pm	• Human Resources & Self Service • Performance Management, ELM, Onboarding • Recruiting Solutions • Time & Labor
Wednesday - Super Hero Social 5:30 pm – 6:30 pm	Exhibitor Hall

Copyright © 2018, Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Event Use Only

PeopleSoft HCM Sessions

Tuesday -2:15 PM – 3:15 PM (London)	**PeopleSoft Human Resources Update of New Features and Legislative Changes for Administrators**
Wednesday – 8:00 AM – 9:00 AM (London)	**Payroll for North America Update and Roadmap**
Wednesday – 11:15 AM – 12:15 PM (Heathrow AB)	**Benefits SIG Roundtable**
Wednesday – 11:15 AM - 12:15 PM (London)	**Chatbot for PeopleSoft HCM is Closer Than You Think**
Wednesday - 4:30 PM - 5:30 PM (Heathrow AB)	**Payroll for North America SIG Meeting**
Wednesday - 4:30 PM - 5:30 PM (London)	**Recruiting Solutions Update and Roadmap**
Thursday – 8:00 AM – 9:00 AM (London)	**Time and Attendance Update and Roadmap**
Thursday - 11:15 AM - 12:45 PM (London)	**Position Management in PeopleSoft - Taking a New Look at an Old Friend**
Thursday - 1:45 PM - 2:45 PM (London)	**PeopleSoft On Boarding and Off Boarding using Activity Guide Composer**
Thursday - 3:00 PM - 4:00 PM (London)	**PeopleSoft HCM Product Team Panel Discussion**

Copyright © 2018, Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Event Use Only

HCM Image 31

- Employee Self Service Termination
- **Tracking of HR Business Partners**
- Development Documents for Employee Snapshot
- ePerformance Auto Document Transfer for Employee Transfers
- Activity Guide Composer
  - Multi User Guides
  - Move to Enterprise Components

- Enhanced Security for Profile Management
- Compensation Cycle for Variable Compensation
- Acknowledgement Framework in Candidate Gateway
- Drop Zones for Guided Self Service and Mobile Paycheck/Paycheque
- Global Payroll Expands GL Chartfields to 21

- Absence Request Attachments – Uptake in GP Brazil, Mexico, GP UK
- **Absence Management Chatbot**
- Fluid Extended Absence Self Service
- Leave and Compensation Balances
- Fluid Reported Time Audit
- Archive Reported Time Including Approvals
- Attendance Violations

ORACLE

HR Business Partner Role

Manage Business Partners

- Liaison between HR and the Business
- Administration and Compliance
- Manage Talent
- Identify Personnel Gaps
- Business Partners can be Generalists or Subject Matter Experts
- *“Organizations that build high-performing HR Business Partners improve employee performance by up to 22%, employee retention by up to 24%, revenue by up to 7%, and profit by up to 9%”* – Gartner

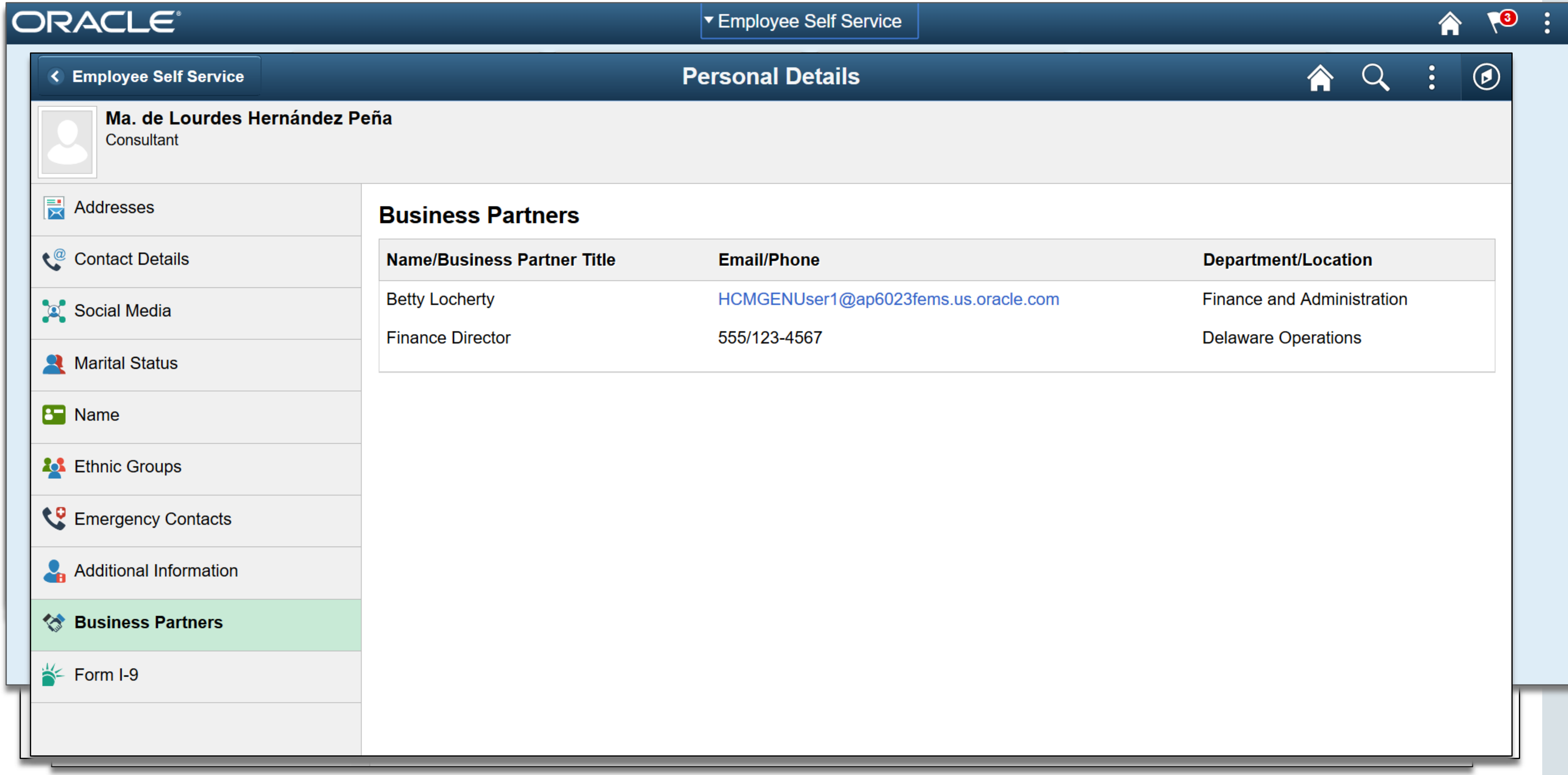
(https://www.gartner.com/en/human-resources/role/hr-business-partners)

HR Business Partners – Feature Highlights

Manage Business Partners

- Build your Business Partner Assignments based on simple or complex criteria
- Configure actions that Business Partners can perform for employees
- Define Business Partners Types (HR, Payroll, Benefits, etc.)
- Setup Alternate Contact Information and Business Partner Teams
- View Business Partners on Company Directory
- Accessible through Workforce Administration Home Page

Copyright © 2018, Oracle and/or its affiliates. All rights reserved. | Confidential – Oracle Internal



ORACLE
▾ Employee Self Service
3
‹ Employee Self Service

Personal Details

Ma. de Lourdes Hernández Peña
Consultant

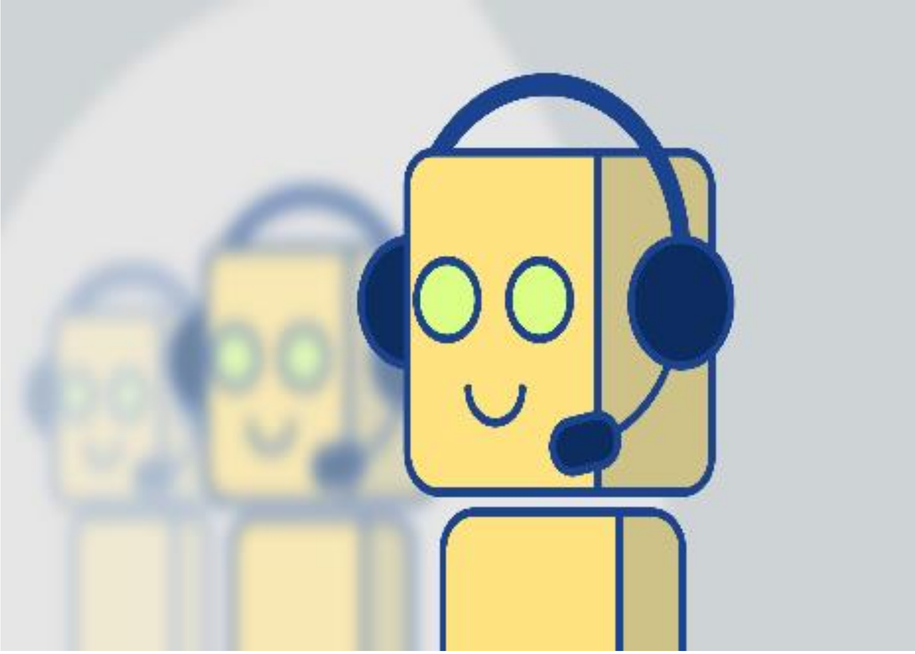
Addresses
Contact Details
Social Media
Marital Status
Name
Ethnic Groups
Emergency Contacts
Additional Information
Business Partners
Form I-9

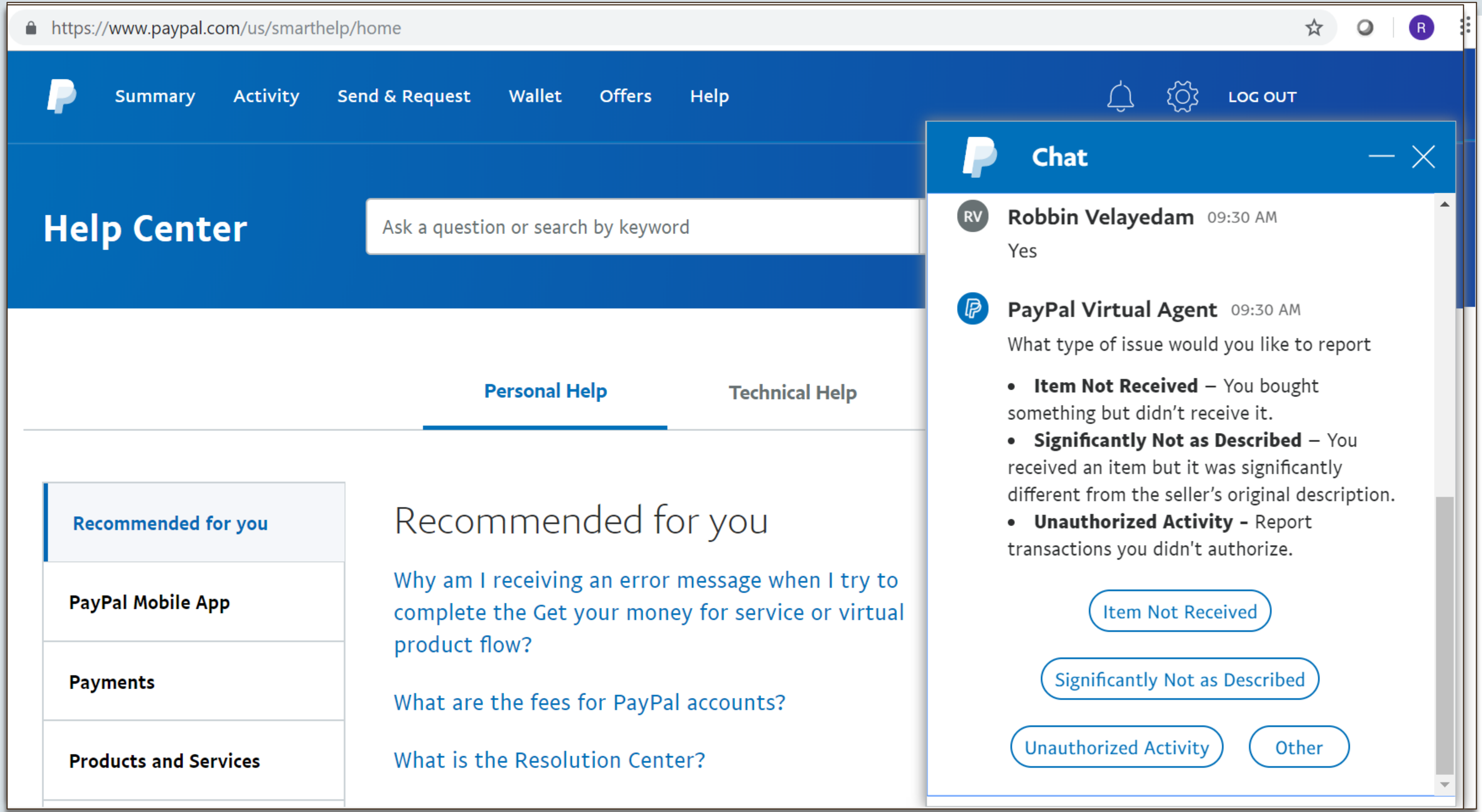
Business Partners

Name/Business Partner Title	Email/Phone	Department/Location
Betty Locherty	HCMGENUser1@ap6023fems.us.oracle.com	Finance and Administration
Finance Director	555/123-4567	Delaware Operations

Copyright © 2018, Oracle and/or its affiliates. All rights reserved. | Confidential – Oracle Internal

Chatbot





https://www.paypal.com/us/smarthelp/home
Summary
Activity
Send & Request
Wallet
Offers
Help
LOG OUT
Help Center
Ask a question or search by keyword
Personal Help
Technical Help
Recommended for you
PayPal Mobile App
Payments
Products and Services
Chat
Item Not Received
Significantly Not as Described
Unauthorized Activity
Other

Recommended for you

Why am I receiving an error message when I try to complete the Get your money for service or virtual product flow?

What are the fees for PayPal accounts?

What is the Resolution Center?

Robbin Velayedam 09:30 AM

Yes

PayPal Virtual Agent 09:30 AM

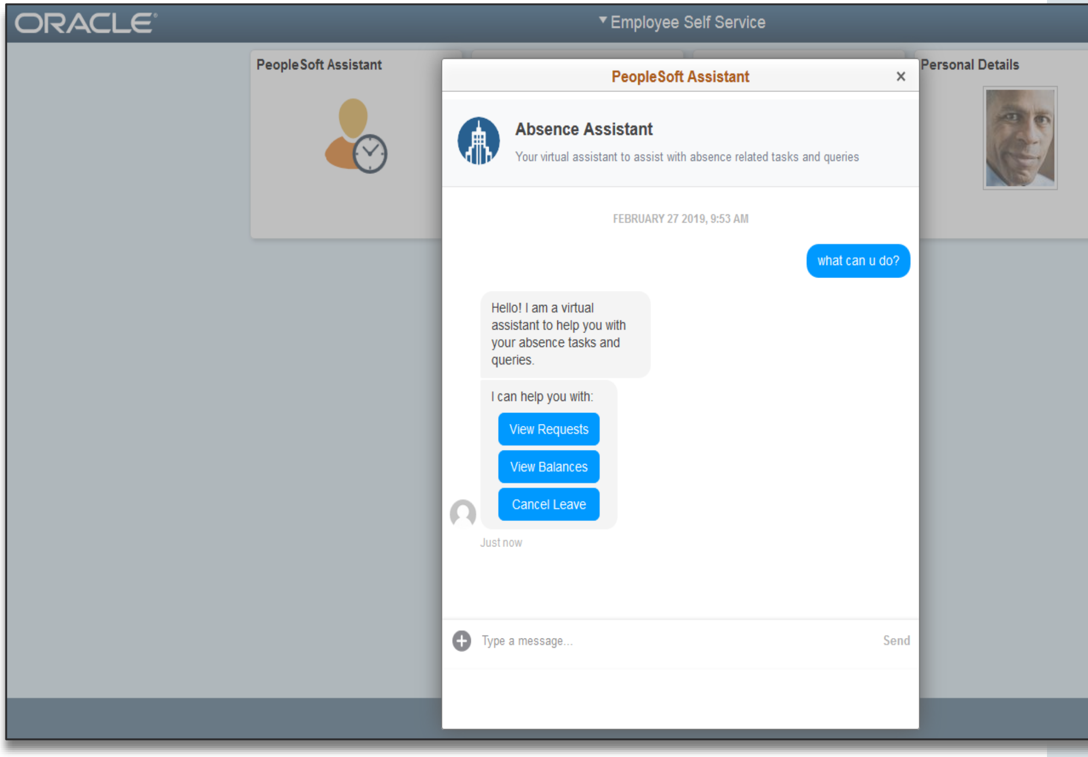
What type of issue would you like to report

- **Item Not Received** – You bought something but didn't receive it.
- **Significantly Not as Described** – You received an item but it was significantly different from the seller's original description.
- **Unauthorized Activity** - Report transactions you didn't authorize.

Copyright © 2018, Oracle and/or its affiliates. All rights reserved. | Confidential – Oracle Internal/Restricted

Chatbot for Absence Management

- Oracle Digital Assistant (ODA)*
  - Separate Oracle Application
  - Identifies Entities and Intents
  - Enables Chatbot User Interface within PSFT
- PeopleTools 8.57
  - Manages integration b/w PeopleSoft and ODA
- PeopleSoft Absence Management
  - Request or Cancel an Absence Request
  - View Current or Forecast Absence Balance
  - Check Status of Absence Requests



ORACLE
Employee Self Service
PeopleSoft Assistant
Personal Details

PeopleSoft Assistant

Absence Assistant

Your virtual assistant to assist with absence related tasks and queries

FEBRUARY 27 2019, 9:53 AM

what can u do?

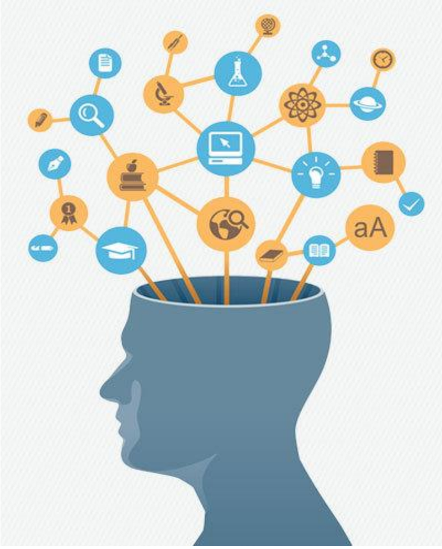
Hello! I am a virtual assistant to help you with your absence tasks and queries.

I can help you with:

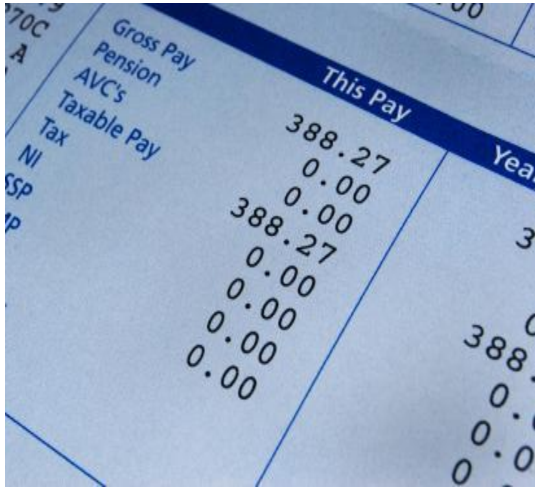
View Requests
View Balances
Cancel Leave
Just now
Type a message...
Send

*** Requires a separate subscription, cloud-based application, can be used with any application – not just PSFT**

Chatbots Roadmap



EMPLOYEE
BENEFITS


Gross Pay
Pension
AVC's
Taxable Pay
Tax
NI
This Pay
388.27
0.00
0.00
388.27
0.00
0.00
0.00
0.00

Company Directory

UNITED STATES
POSTAL SERVICE®
Change of Address
Fill out the change of address form

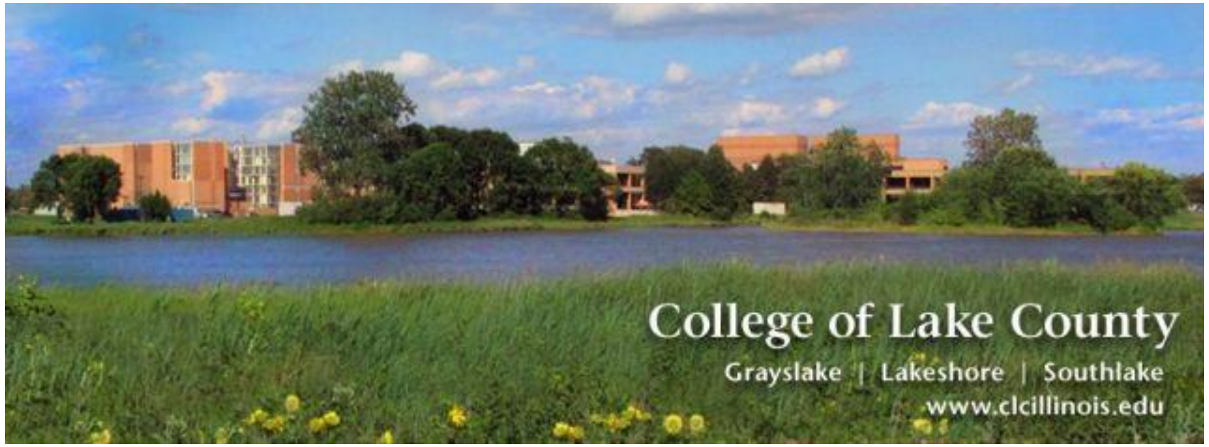
Fluid Benefits Open Enrollment

EMPLOYEE
BENEFITS

Copyright © 2018, Oracle and/or its affiliates. All rights reserved. | Confidential – Oracle Internal/Restricted

College of Lake County (CLC)

- Located in Grayslake, Illinois
- Employs:
  - Over 2,000 Employees
  - 663 Eligible for Open Enrollment
- On PeopleSoft since 1998
- Currently:
  - HCM 9.2, PUM29
  - PeopleTools 8.55.12 (yes, we are outdated 😉)
  - DB2 Database
  - No delivered security roles in PRD
  - Use Benefits Administration Open Enrollment, but not Life Events at this time


College of Lake County
Grayslake | Lakeshore | Southlake
www.clcillinois.edu

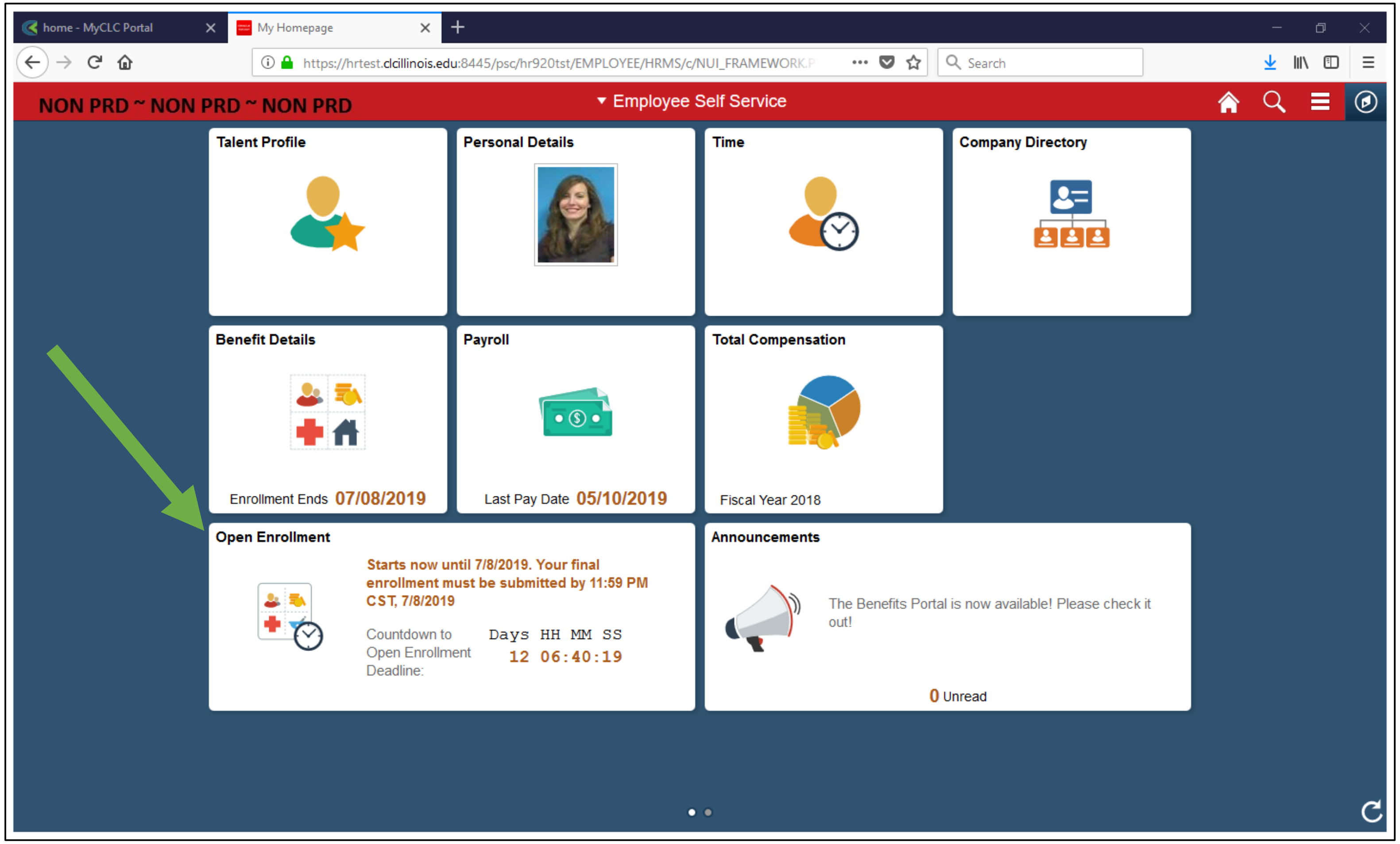
College Lake County™
Connect to Your Future

The Case for Fluid Open Enrollment

- Benefits of Fluid OE and Statements
  - Activity Guide Composer and Template allow flexibility during setup
  - Can be personalized to employee and institution
  - Clear steps/easy to follow
  - Employees can access anywhere (phone, tablet etc.)
  - Receive PDF statements of benefit choices
- Implementation
  - 1.5 months – Build/Test/Implementation
    - 75% of each day spent on fluid OE
    - Dedicated IT resource

College of Lake County
Connect to Your Future

What it Looks Like for CLC…


home - MyCLC Portal
My Homepage
https://hrtest.clcillinois.edu:8445/psc/hr920tst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.P
Search
NON PRD ~ NON PRD ~ NON PRD
▾ Employee Self Service
Talent Profile
Personal Details
Time
Company Directory
Benefit Details
Payroll
Total Compensation
Open Enrollment
Announcements

Enrollment Ends 07/08/2019

Last Pay Date 05/10/2019

Fiscal Year 2018

Starts now until 7/8/2019. Your final enrollment must be submitted by 11:59 PM CST, 7/8/2019

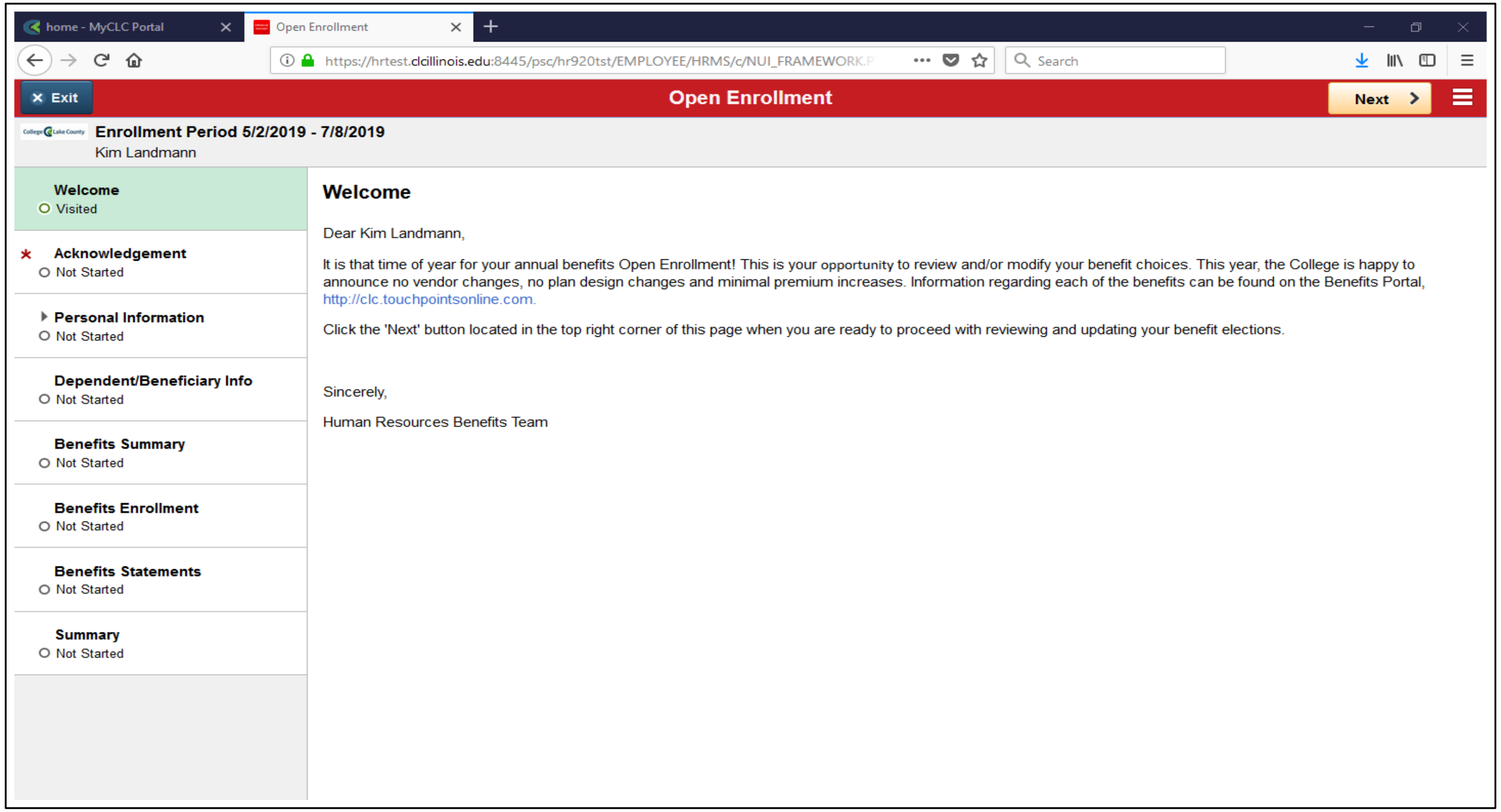
Countdown to Open Enrollment Deadline: Days HH MM SS 12 06:40:19

The Benefits Portal is now available! Please check it out!

0 Unread

- OE Tile very informative
- Information derived from Enrollment Begin and End Dates on the Open Enrollment Definition page

Open Enrollment Activity Guide


home - MyCLC Portal
Open Enrollment
https://hrtest.clcillinois.edu:8445/psc/hr920tst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.P
Search
Exit
Open Enrollment
Next
Welcome
Visited
Acknowledgement
Not Started
Personal Information
Not Started
Dependent/Beneficiary Info
Not Started
Benefits Summary
Not Started
Benefits Enrollment
Not Started
Benefits Statements
Not Started
Summary
Not Started

Enrollment Period 5/2/2019 - 7/8/2019
Kim Landmann

Welcome

Dear Kim Landmann,

It is that time of year for your annual benefits Open Enrollment! This is your opportunity to review and/or modify your benefit choices. This year, the College is happy to announce no vendor changes, no plan design changes and minimal premium increases. Information regarding each of the benefits can be found on the Benefits Portal, http://clc.touchpointsonline.com.

Click the 'Next' button located in the top right corner of this page when you are ready to proceed with reviewing and updating your benefit elections.

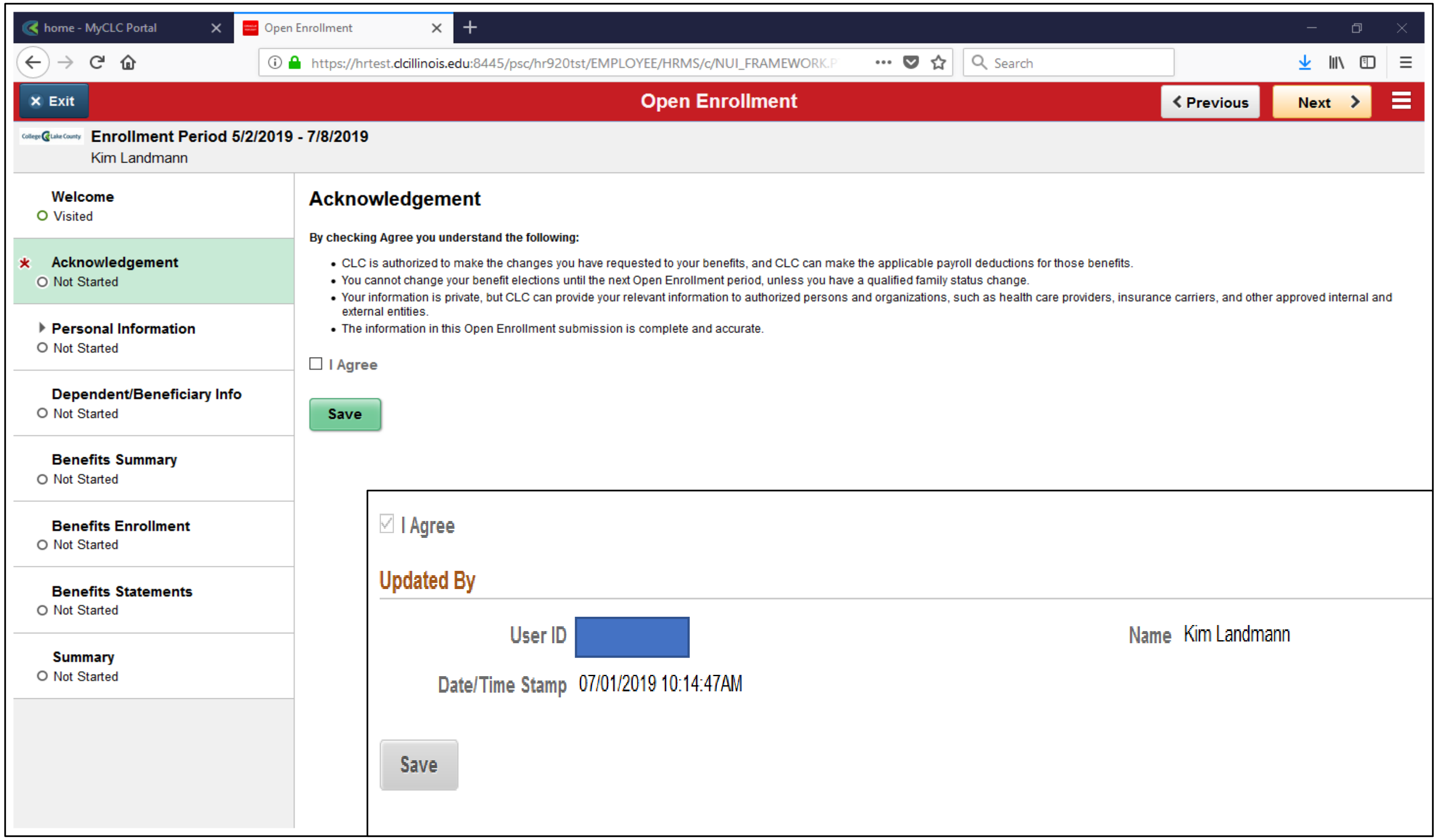
Sincerely,

Human Resources Benefits Team

- Welcome statement personalized to employee
  - AG Template setup
  - No video due to update of Service ID in AG Category
- All steps shown are delivered in AG template
- Added in Acknowledgement step

College Lake County
Connect to Your Future

Open Enrollment Activity Guide


home - MyCLC Portal
Open Enrollment
https://hrtest.clcillinois.edu:8445/psc/hr920tst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.P
Search
Exit
Open Enrollment
Previous
Next

Enrollment Period 5/2/2019 - 7/8/2019
Kim Landmann

- **Welcome** ○ Visited
- **Acknowledgement** ○ Not Started
- **Personal Information** ○ Not Started
- **Dependent/Beneficiary Info** ○ Not Started
- **Benefits Summary** ○ Not Started
- **Benefits Enrollment** ○ Not Started
- **Benefits Statements** ○ Not Started
- **Summary** ○ Not Started

Acknowledgement

By checking Agree you understand the following:

- CLC is authorized to make the changes you have requested to your benefits, and CLC can make the applicable payroll deductions for those benefits.
- You cannot change your benefit elections until the next Open Enrollment period, unless you have a qualified family status change.
- Your information is private, but CLC can provide your relevant information to authorized persons and organizations, such as health care providers, insurance carriers, and other approved internal and external entities.
- The information in this Open Enrollment submission is complete and accurate.

☐ I Agree

Save

☑ I Agree

Updated By

User ID [redacted]

Name Kim Landmann

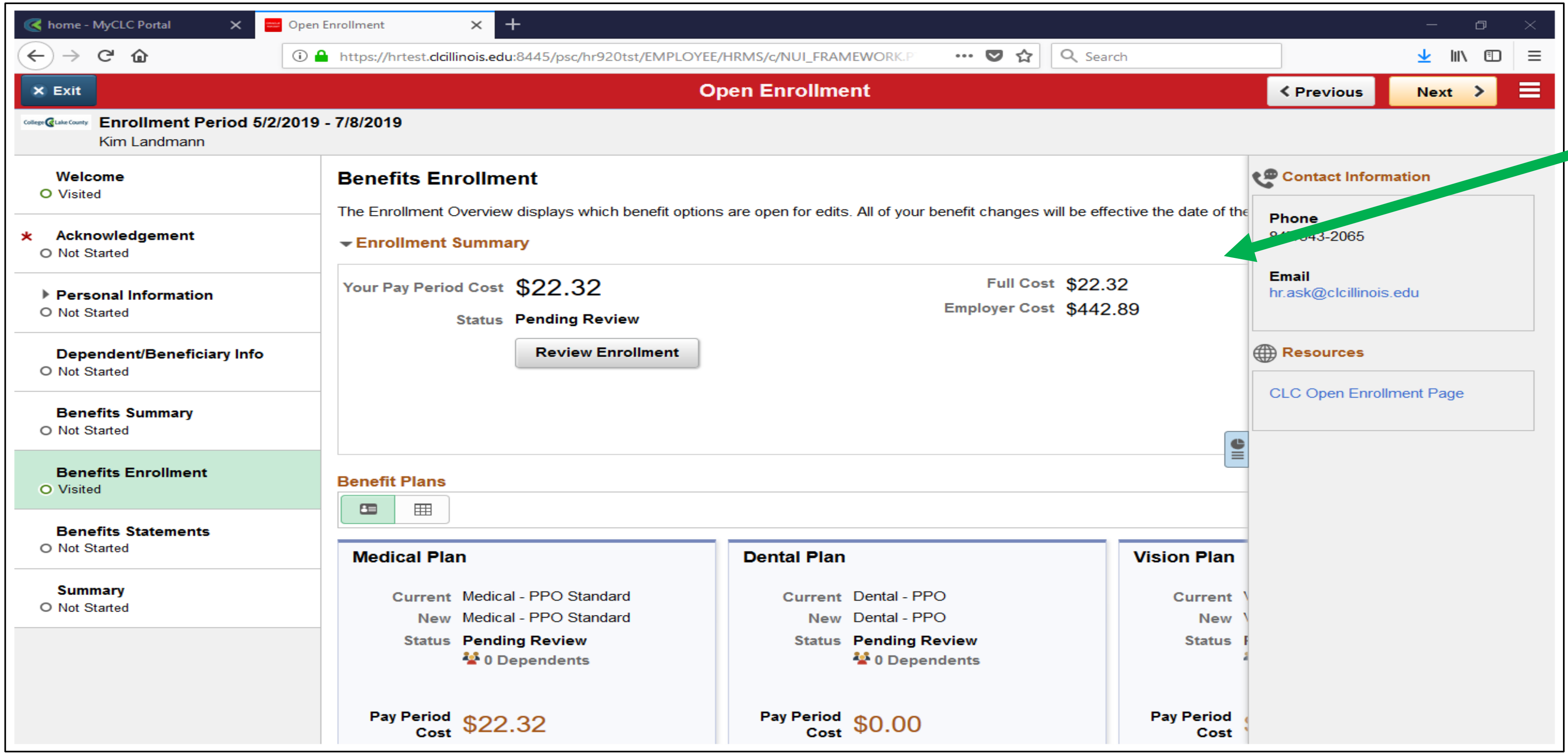
Date/Time Stamp 07/01/2019 10:14:47AM

Save

- What finished Acknowledgement Framework looks like
- Once 'I agree' is checked and saved the date/time stamp and other information will display
- All configurable on Acknowledgement Framework setup page
- Employee does NOT need to 'agree' to move on to a new step

College of Lake County
Connect to Your Future

Open Enrollment Guide


home - MyCLC Portal
Open Enrollment
https://hrtest.clcillinois.edu:8445/psc/hr920tst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.P
Search
✕ Exit
Open Enrollment
< Previous
Next >

Enrollment Period 5/2/2019 - 7/8/2019
Kim Landmann

Welcome
○ Visited

Acknowledgement
○ Not Started

Personal Information
○ Not Started

Dependent/Beneficiary Info
○ Not Started

Benefits Summary
○ Not Started

Benefits Enrollment
○ Visited

Benefits Statements
○ Not Started

Summary
○ Not Started

Benefits Enrollment

The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the

Enrollment Summary

Your Pay Period Cost $22.32
Status **Pending Review**
Full Cost $22.32
Employer Cost $442.89

Review Enrollment

Benefit Plans

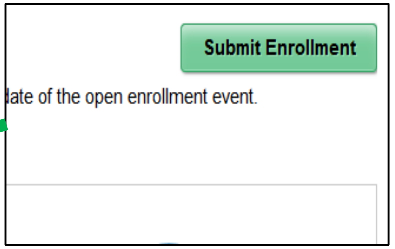
Medical Plan
Current Medical - PPO Standard
New Medical - PPO Standard
Status **Pending Review**
0 Dependents
Pay Period Cost $22.32

Dental Plan
Current Dental - PPO
New Dental - PPO
Status **Pending Review**
0 Dependents
Pay Period Cost $0.00

Vision Plan
Current
New
Status
Pay Period Cost

Contact Information
Phone
84[illegible]43-2065
Email
hr.ask@clcillinois.edu

Resources
CLC Open Enrollment Page

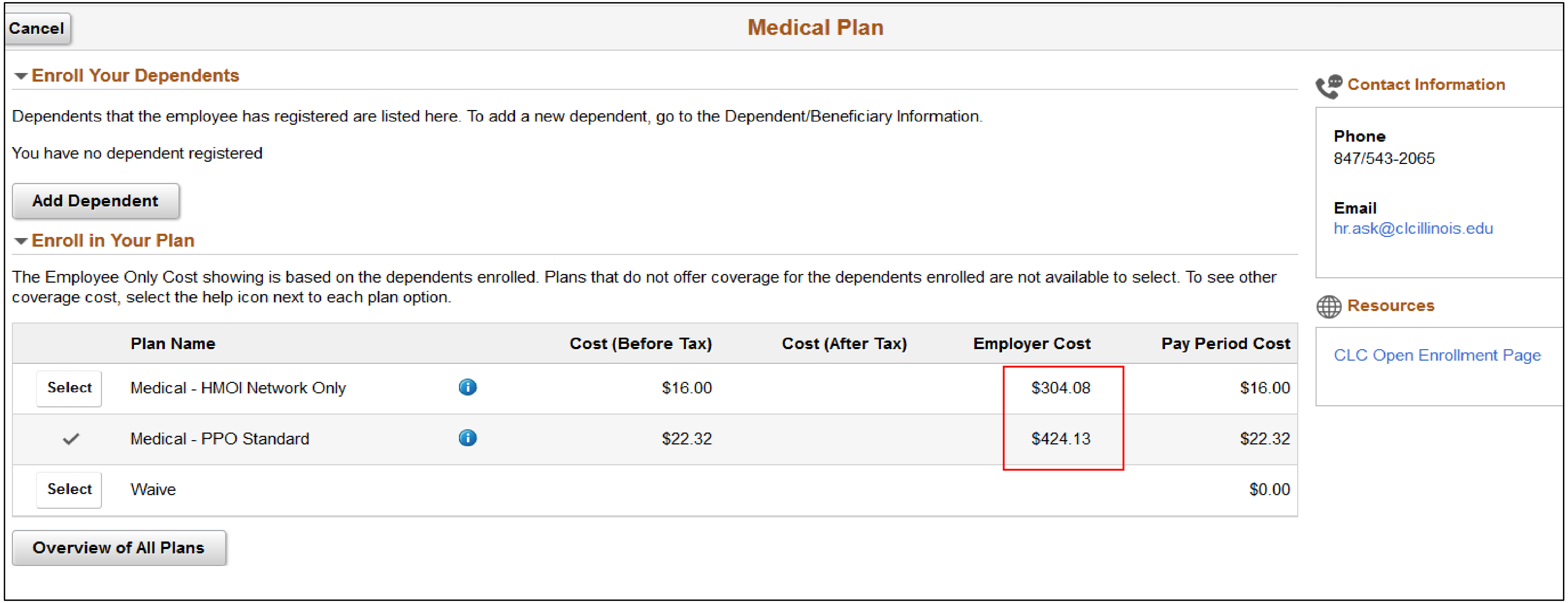

Submit Enrollment

late of the open enrollment event.

- Submit button is behind Supplemental Panel
- Employer cost displays
- Only chosen Benefit Plans display

College Lake County
Connect to Your Future

Open Enrollment Guide



Medical Plan

Enroll Your Dependents

Dependents that the employee has registered are listed here. To add a new dependent, go to the Dependent/Beneficiary Information.

You have no dependent registered

Enroll in Your Plan

The Employee Only Cost showing is based on the dependents enrolled. Plans that do not offer coverage for the dependents enrolled are not available to select. To see other coverage cost, select the help icon next to each plan option.

	Plan Name		Cost (Before Tax)	Cost (After Tax)	Employer Cost	Pay Period Cost
Select	Medical - HMOI Network Only	ⓘ	$16.00		$304.08	$16.00
✓	Medical - PPO Standard	ⓘ	$22.32		$424.13	$22.32
Select	Waive					$0.00

Contact Information

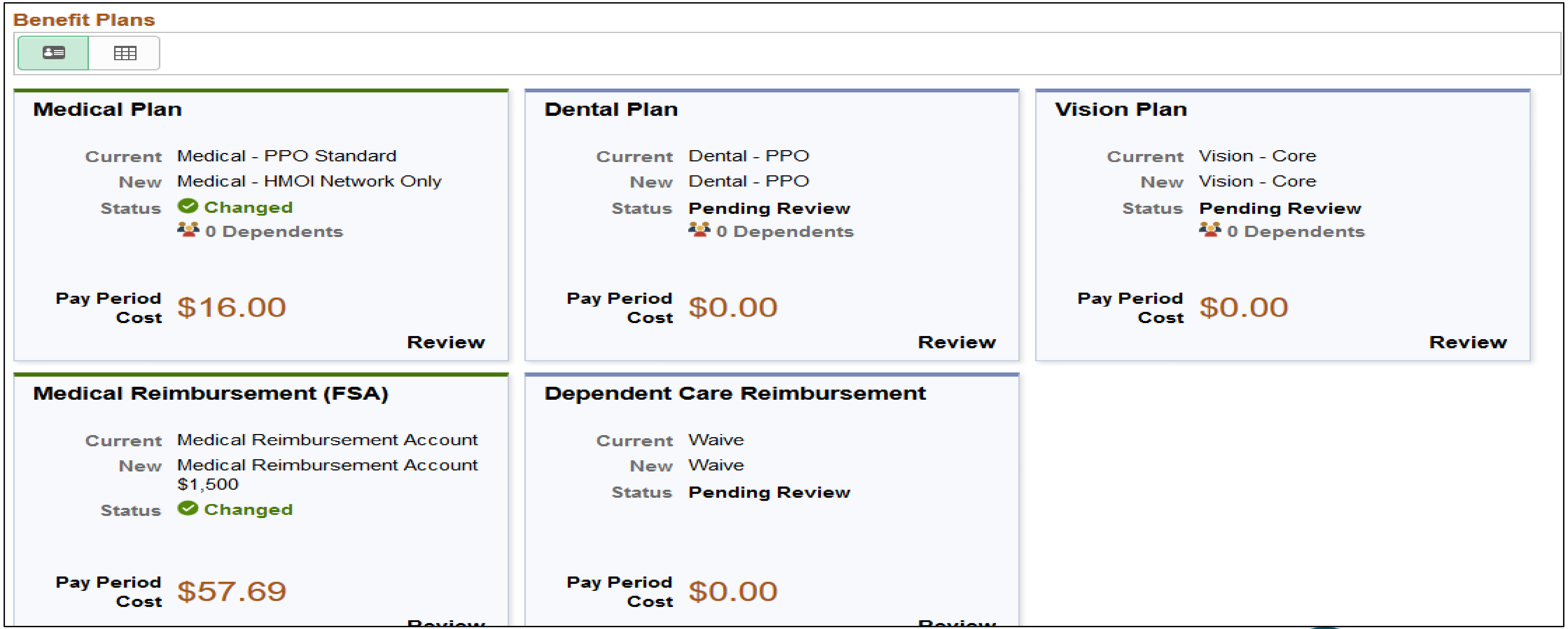
Phone
847/543-2065

Email
hr.ask@clcillinois.edu

Resources

CLC Open Enrollment Page

Open Enrollment Guide



Benefit Plans

Medical Plan

Current Medical - PPO Standard
New Medical - HMOI Network Only
Status ✓ Changed
0 Dependents

Pay Period Cost $16.00

Review

Dental Plan

Current Dental - PPO
New Dental - PPO
Status **Pending Review**
0 Dependents

Pay Period Cost $0.00

Review

Vision Plan

Current Vision - Core
New Vision - Core
Status **Pending Review**
0 Dependents

Pay Period Cost $0.00

Review

Medical Reimbursement (FSA)

Current Medical Reimbursement Account
New Medical Reimbursement Account $1,500
Status ✓ Changed

Pay Period Cost $57.69

Dependent Care Reimbursement

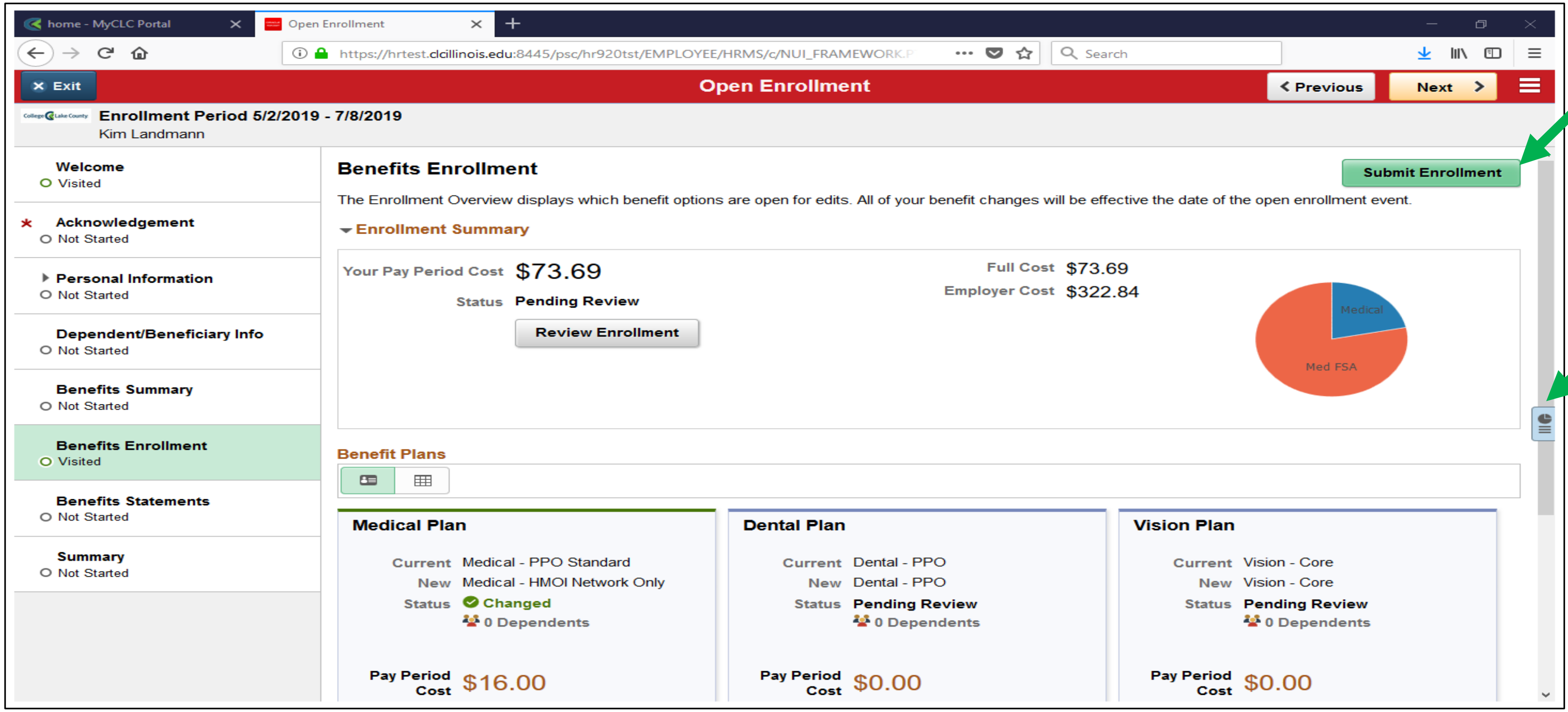
Current Waive
New Waive
Status **Pending Review**

Pay Period Cost $0.00

- Which Benefit Plans (cards) display is controlled on the Benefit Program with the ‘Show if no Choice’ checkbox

College Lake County
Connect to Your Future

Open Enrollment Guide


home - MyCLC Portal
Open Enrollment
https://hrtest.clcillinois.edu:8445/psc/hr920tst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.P
Search
Exit
Open Enrollment
Previous
Next
Submit Enrollment
Review Enrollment
Medical
Med FSA

Enrollment Period 5/2/2019 - 7/8/2019
Kim Landmann

- **Welcome**
  ○ Visited
- * **Acknowledgement**
  ○ Not Started
- **Personal Information**
  ○ Not Started
- **Dependent/Beneficiary Info**
  ○ Not Started
- **Benefits Summary**
  ○ Not Started
- **Benefits Enrollment**
  ○ Visited
- **Benefits Statements**
  ○ Not Started
- **Summary**
  ○ Not Started

Benefits Enrollment

The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.

Enrollment Summary

Your Pay Period Cost $73.69
Status **Pending Review**

Full Cost $73.69
Employer Cost $322.84

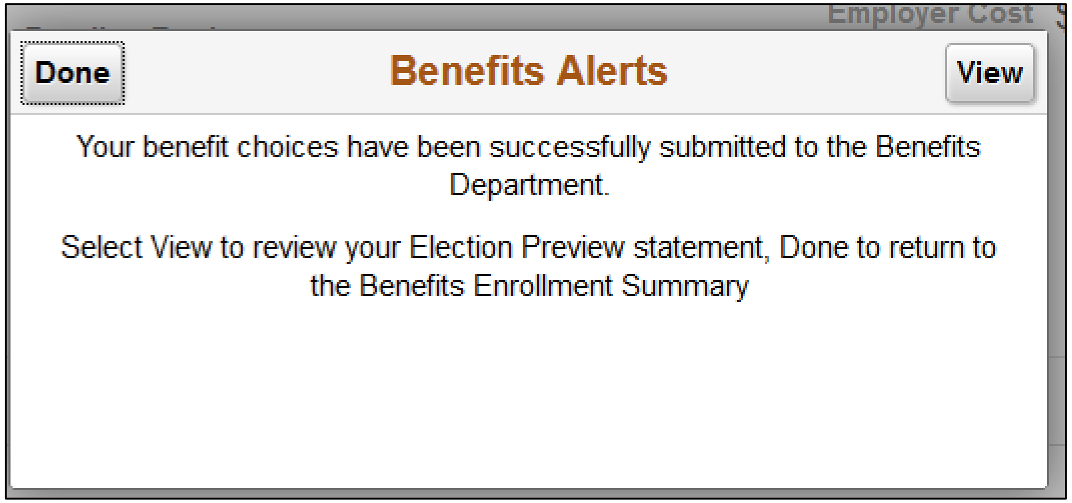
Benefit Plans

	Medical Plan	Dental Plan	Vision Plan
Current	Medical - PPO Standard	Dental - PPO	Vision - Core
New	Medical - HMOI Network Only	Dental - PPO	Vision - Core
Status	✓ Changed 0 Dependents	Pending Review 0 Dependents	Pending Review 0 Dependents
Pay Period Cost	$16.00	$0.00	$0.00

Submit button now visible

Supplemental Panel is closed

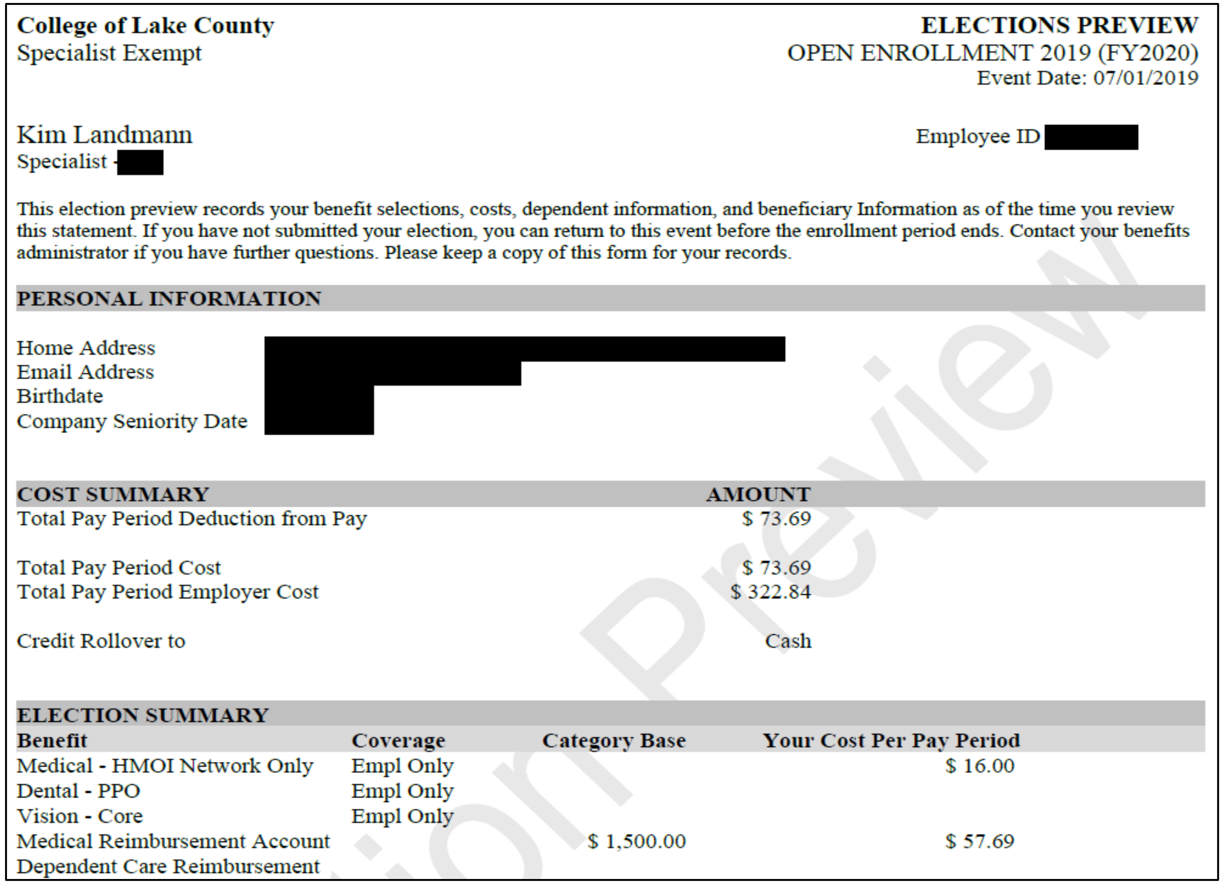
Open Enrollment Guide



Benefits Alerts

Your benefit choices have been successfully submitted to the Benefits Department.

Select View to review your Election Preview statement, Done to return to the Benefits Enrollment Summary



College of Lake County
Specialist Exempt

ELECTIONS PREVIEW
OPEN ENROLLMENT 2019 (FY2020)
Event Date: 07/01/2019

Kim Landmann
Specialist [redacted]

Employee ID [redacted]

This election preview records your benefit selections, costs, dependent information, and beneficiary Information as of the time you review this statement. If you have not submitted your election, you can return to this event before the enrollment period ends. Contact your benefits administrator if you have further questions. Please keep a copy of this form for your records.

PERSONAL INFORMATION

Home Address
Email Address
Birthdate
Company Seniority Date

[redacted]

COST SUMMARY	AMOUNT
Total Pay Period Deduction from Pay	$ 73.69
Total Pay Period Cost	$ 73.69
Total Pay Period Employer Cost	$ 322.84
Credit Rollover to	Cash

ELECTION SUMMARY

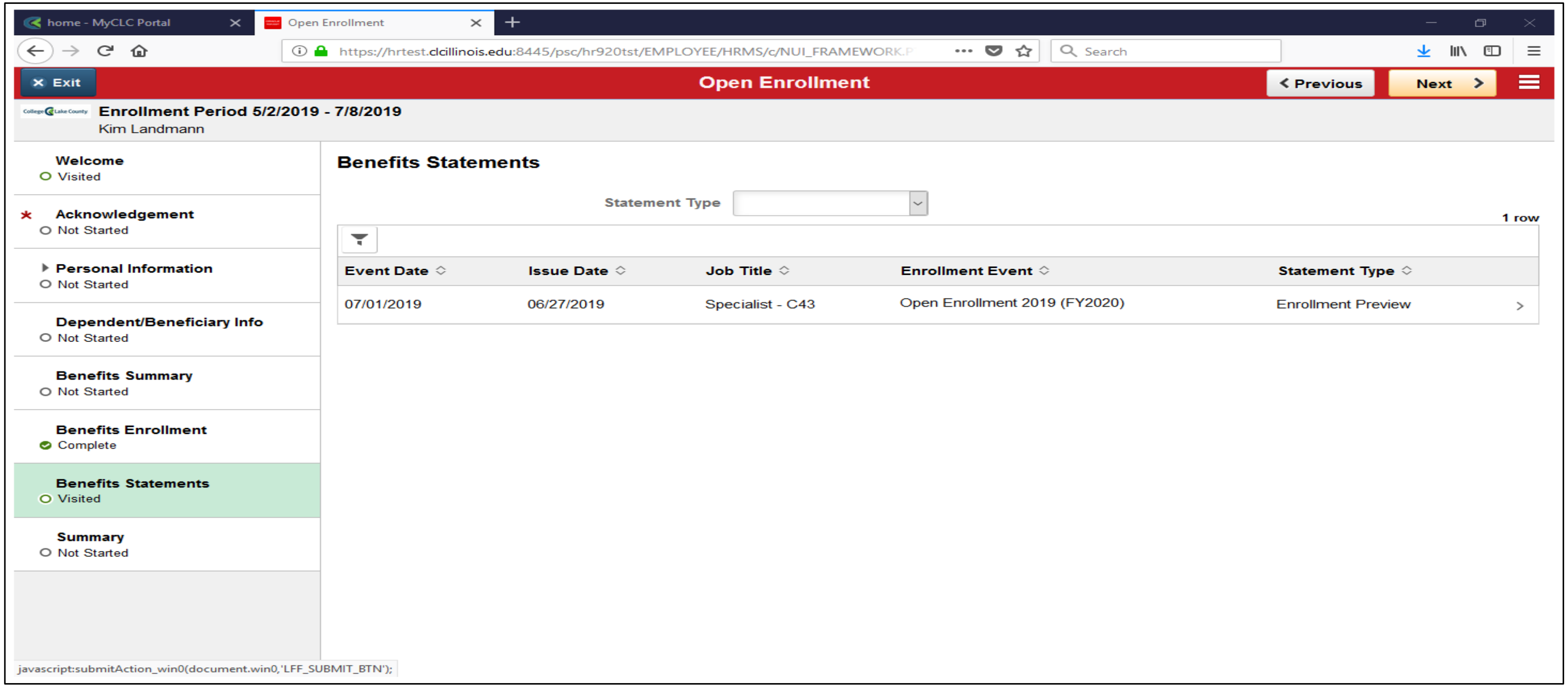
Benefit	Coverage	Category Base	Your Cost Per Pay Period
Medical - HMOI Network Only	Empl Only		$ 16.00
Dental - PPO	Empl Only		
Vision - Core	Empl Only		
Medical Reimbursement Account		$ 1,500.00	$ 57.69
Dependent Care Reimbursement			

Election Preview

- Click Submit and then View, to see Enrollment Preview.
- Enrollment Preview form can be reviewed prior to submit though

College of Lake County™
Connect to Your Future

Benefits Statements


home - MyCLC Portal
Open Enrollment
https://hrtest.clcillinois.edu:8445/psc/hr920tst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.P
Search
Exit
Open Enrollment
Previous
Next

Enrollment Period 5/2/2019 - 7/8/2019
Kim Landmann

Welcome
○ Visited

Acknowledgement
○ Not Started

Personal Information
○ Not Started

Dependent/Beneficiary Info
○ Not Started

Benefits Summary
○ Not Started

Benefits Enrollment
✓ Complete

Benefits Statements
○ Visited

Summary
○ Not Started

Benefits Statements

Statement Type

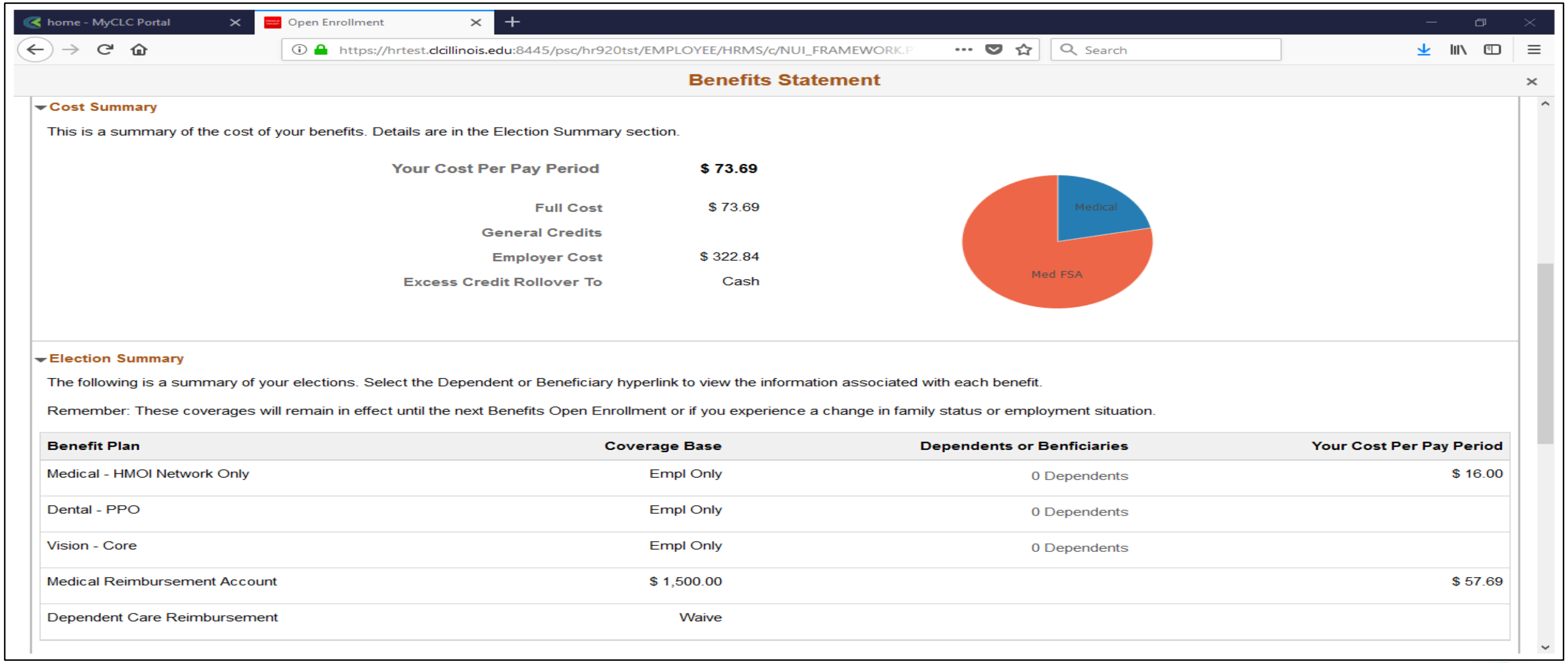
1 row

Event Date	Issue Date	Job Title	Enrollment Event	Statement Type
07/01/2019	06/27/2019	Specialist - C43	Open Enrollment 2019 (FY2020)	Enrollment Preview

javascript:submitAction_win0(document.win0,'LFF_SUBMIT_BTN');

- Enrollment Preview also available on Benefits Statements step in Online or PDF format

Benefits Statements – Online Version


home - MyCLC Portal
Open Enrollment
https://hrtest.clcillinois.edu:8445/psc/hr920tst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.P
Search
Medical
Med FSA

Benefits Statement

Cost Summary

This is a summary of the cost of your benefits. Details are in the Election Summary section.

Your Cost Per Pay Period	**$ 73.69**
Full Cost	$ 73.69
General Credits	
Employer Cost	$ 322.84
Excess Credit Rollover To	Cash

Election Summary

The following is a summary of your elections. Select the Dependent or Beneficiary hyperlink to view the information associated with each benefit.

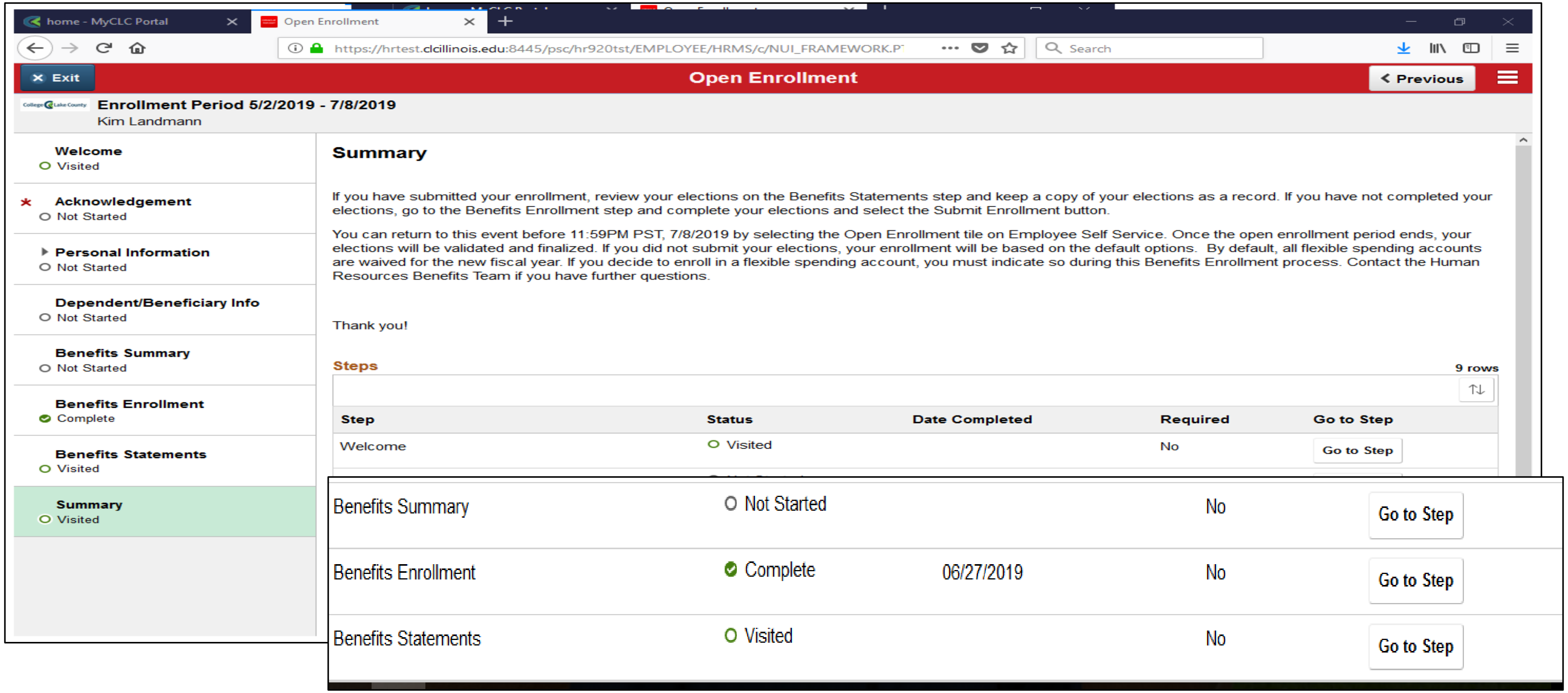
Remember: These coverages will remain in effect until the next Benefits Open Enrollment or if you experience a change in family status or employment situation.

Benefit Plan	Coverage Base	Dependents or Benficiaries	Your Cost Per Pay Period
Medical - HMOI Network Only	Empl Only	0 Dependents	$ 16.00
Dental - PPO	Empl Only	0 Dependents	
Vision - Core	Empl Only	0 Dependents	
Medical Reimbursement Account	$ 1,500.00		$ 57.69
Dependent Care Reimbursement	Waive		

Print View button available in upper right hand corner

College Lake County
Connect to Your Future

Summary Step


home - MyCLC Portal
Open Enrollment
https://hrtest.clcillinois.edu:8445/psc/hr920tst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.P
Search
✕ Exit
Open Enrollment
< Previous

Enrollment Period 5/2/2019 - 7/8/2019
Kim Landmann

Welcome
○ Visited

Acknowledgement
○ Not Started

Personal Information
○ Not Started

Dependent/Beneficiary Info
○ Not Started

Benefits Summary
○ Not Started

Benefits Enrollment
✓ Complete

Benefits Statements
○ Visited

Summary
○ Visited

Summary

If you have submitted your enrollment, review your elections on the Benefits Statements step and keep a copy of your elections as a record. If you have not completed your elections, go to the Benefits Enrollment step and complete your elections and select the Submit Enrollment button.

You can return to this event before 11:59PM PST, 7/8/2019 by selecting the Open Enrollment tile on Employee Self Service. Once the open enrollment period ends, your elections will be validated and finalized. If you did not submit your elections, your enrollment will be based on the default options. By default, all flexible spending accounts are waived for the new fiscal year. If you decide to enroll in a flexible spending account, you must indicate so during this Benefits Enrollment process. Contact the Human Resources Benefits Team if you have further questions.

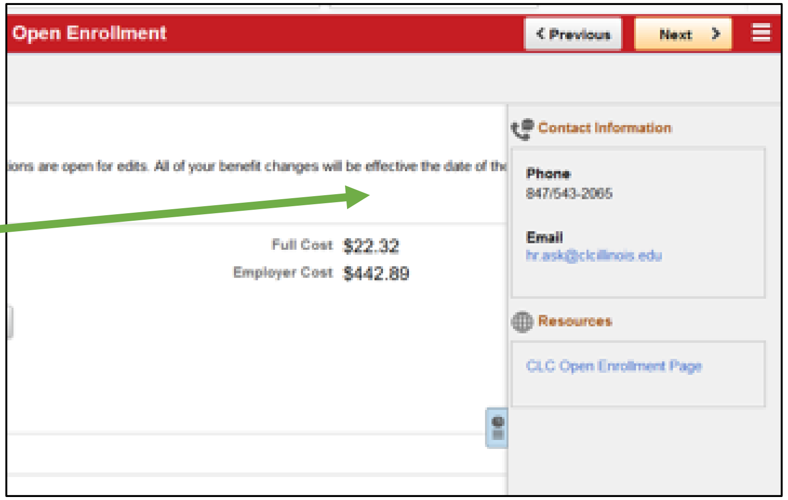
Thank you!

Steps 9 rows

Step	Status	Date Completed	Required	Go to Step
Welcome	○ Visited		No	Go to Step
Benefits Summary	○ Not Started		No	Go to Step
Benefits Enrollment	✓ Complete	06/27/2019	No	Go to Step
Benefits Statements	○ Visited		No	Go to Step

- Can be personalized like the Welcome Statement
- Shows employee what they have visited and/or completed

Gotchas



ions are open for edits. All of your benefit changes will be effective the date of th

Full Cost $22.32
Employer Cost $442.89

Phone
847/543-2065

Email
hr.ask@clcillinois.edu

- OE Supplemental Panel
  - Must fill in following pages:
    - Administrative Contacts page
    - Enrollment Contact Assignment page
      - Leave ALLEVENT as Contact Group
      - Supplemental panel coded specifically for this group
  - PeopleCode commented out for URL, so link does not work (Bug)
    - Activate the PeopleCode for the URL
- Enrollment Preview Form Creation
  - Has nothing to do with processing status (i.e. Notified)
  - Created each time employee selects Review Enrollment, regardless if they hit Submit
- Benefits Statement Options
  - Security to this new page
  - Connects Benefits Statements to the Schedule ID
  - Self Service Checkbox
- We Don’t Use Delivered Roles

College Lake County
Connect to Your Future

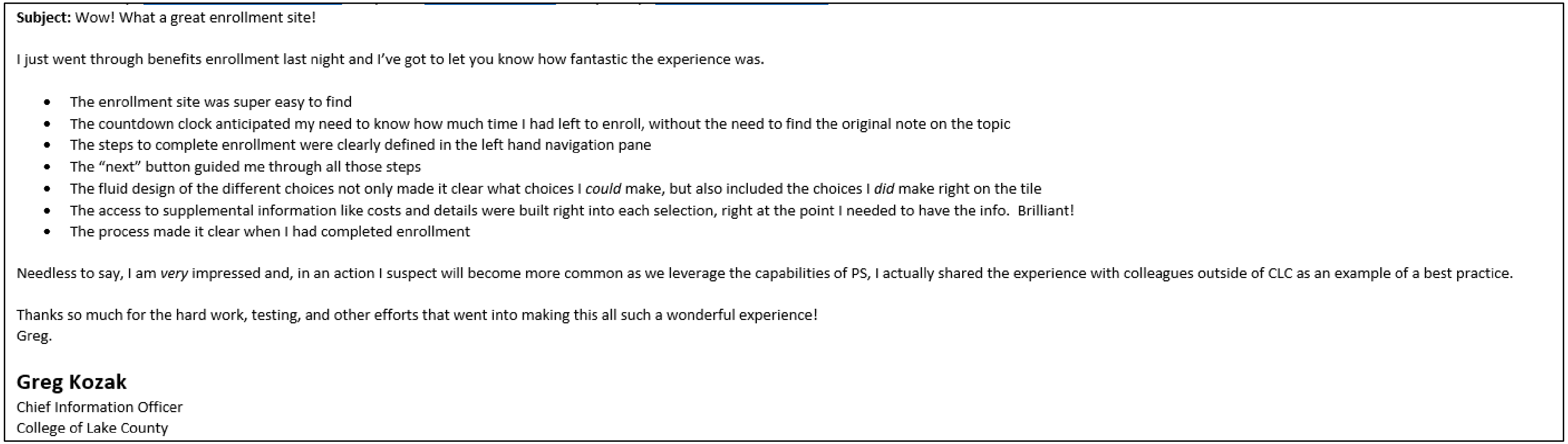
Customizations

- Removed Excess Credit dropdown option
  - Confusing for our employees as they do not have credits
- Updated message catalogs for 6x plan types
- Hide fields on the Benefits Statements
  - Easily customizable
- Coded for different pay periods for FSA calculations
  - We have employees paid on 20 and 22 pay periods that are set up under our traditional 26 pay calendar table

College Lake County™
Connect to Your Future

Feedback

- Very positive from all employee groups
- CIO even emailed me!



Subject: Wow! What a great enrollment site!

I just went through benefits enrollment last night and I've got to let you know how fantastic the experience was.

- The enrollment site was super easy to find
- The countdown clock anticipated my need to know how much time I had left to enroll, without the need to find the original note on the topic
- The steps to complete enrollment were clearly defined in the left hand navigation pane
- The "next" button guided me through all those steps
- The fluid design of the different choices not only made it clear what choices I *could* make, but also included the choices I *did* make right on the tile
- The access to supplemental information like costs and details were built right into each selection, right at the point I needed to have the info. Brilliant!
- The process made it clear when I had completed enrollment

Needless to say, I am *very* impressed and, in an action I suspect will become more common as we leverage the capabilities of PS, I actually shared the experience with colleagues outside of CLC as an example of a best practice.

Thanks so much for the hard work, testing, and other efforts that went into making this all such a wonderful experience!
Greg.

Greg Kozak
Chief Information Officer
College of Lake County

Takeaways

- Positives
  - Simple to set up
  - Positive feedback
  - Mobile capability
  - Employee receives detailed benefit forms
  - No training needed
    - Emailed a simple ‘How to Enroll’ document
- Opportunity for Improvement
  - Submit button placement
    - Supplemental panel can block submit button
    - Oracle will send this to their UX (Usability Experience) team to review

College of Lake County™
Connect to Your Future

www.peoplesoftinfo.com

Family Disability
Life Insurance
Vision Medical Dental
Pension Coverage
Benefits
Health Wellness
Spending Accounts
Retirement
Dependents
401K
Vacation
Play (k)
0:10 / 8:26

PeopleSoft Fluid Benefits Enrollment

Highlights Videos

- Images 23, 26, 28, 29

Video Feature Overviews (VFO)

- Fluid Life Events
- Fluid Benefits Enrollment
- Activity Guide Composer
- Acknowledgement Framework
- Questionnaire Framework VFO

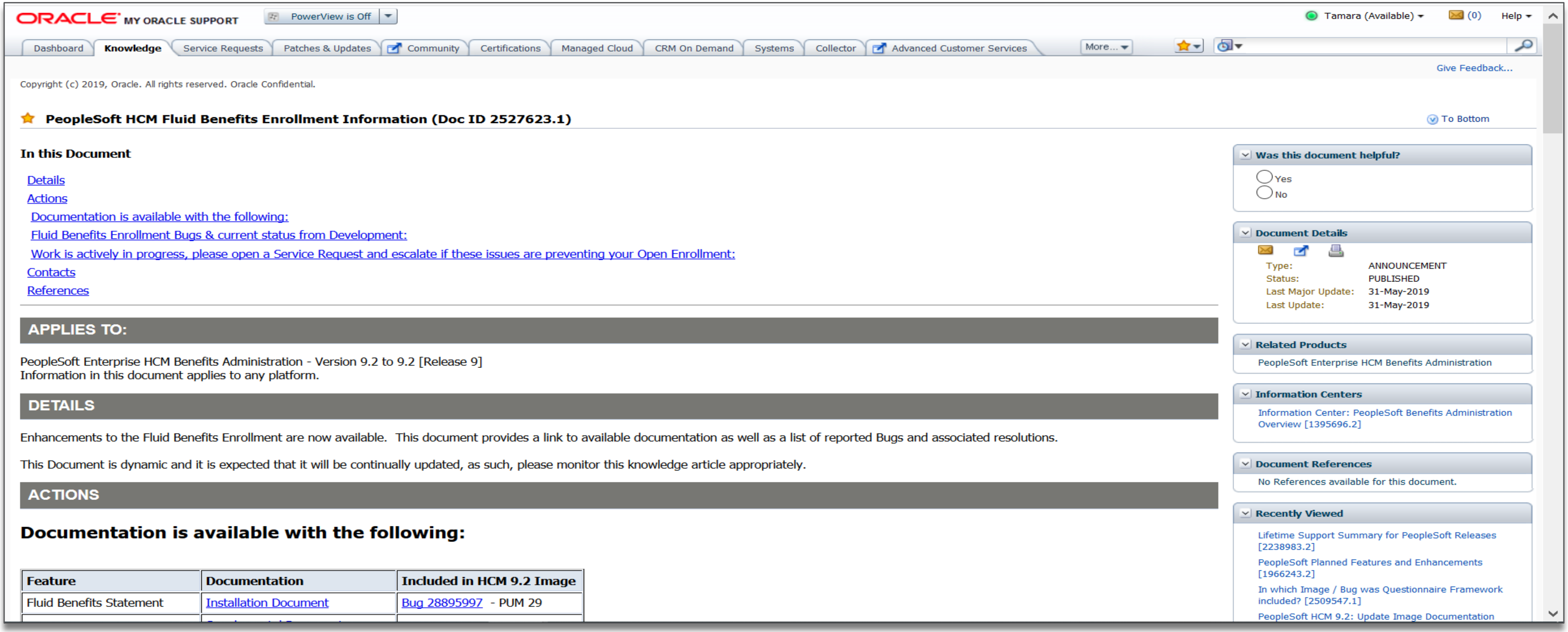
Spotlight Video

- Activity Guide Composer

Coming Soon

- Spotlight on Fluid Life Events

MOS Central Page for the Latest News


ORACLE MY ORACLE SUPPORT
PowerView is Off
Tamara (Available)
(0)
Help
Dashboard
Knowledge
Service Requests
Patches & Updates
Community
Certifications
Managed Cloud
CRM On Demand
Systems
Collector
Advanced Customer Services
More...
Give Feedback...
To Bottom

Copyright (c) 2019, Oracle. All rights reserved. Oracle Confidential.

PeopleSoft HCM Fluid Benefits Enrollment Information (Doc ID 2527623.1)

In this Document

- Details
- Actions
  - Documentation is available with the following:
  - Fluid Benefits Enrollment Bugs & current status from Development:
  - Work is actively in progress, please open a Service Request and escalate if these issues are preventing your Open Enrollment:
- Contacts
- References

APPLIES TO:

PeopleSoft Enterprise HCM Benefits Administration - Version 9.2 to 9.2 [Release 9]
Information in this document applies to any platform.

DETAILS

Enhancements to the Fluid Benefits Enrollment are now available. This document provides a link to available documentation as well as a list of reported Bugs and associated resolutions.

This Document is dynamic and it is expected that it will be continually updated, as such, please monitor this knowledge article appropriately.

ACTIONS

Documentation is available with the following:

Feature	Documentation	Included in HCM 9.2 Image
Fluid Benefits Statement	Installation Document	Bug 28895997 - PUM 29

Was this document helpful?

○ Yes
○ No

Document Details

Type: ANNOUNCEMENT
Status: PUBLISHED
Last Major Update: 31-May-2019
Last Update: 31-May-2019

Related Products

PeopleSoft Enterprise HCM Benefits Administration

Information Centers

Information Center: PeopleSoft Benefits Administration Overview [1395696.2]

Document References

No References available for this document.

Recently Viewed

- Lifetime Support Summary for PeopleSoft Releases [2238983.2]
- PeopleSoft Planned Features and Enhancements [1966243.2]
- In which Image / Bug was Questionnaire Framework included? [2509547.1]
- PeopleSoft HCM 9.2: Update Image Documentation

https://support.oracle.com/epmos/faces/DocumentDisplay?id=2527623.1

PeopleSoft HCM Strategic Initiatives

vision
ccess development
management
ideas
teamwork
project
STRATEGY
invent
team
action
motivation
leadership
innovation
planning

- **Employee Engagement**

  Employee Self Service, Guided Self Service for Managers, Onboarding, Online PaySlip, PayCheck Modeler, Employee Surveys, Approvals & Delegation, Company Directory, Chatbots…

- **Enabling Compliance**

  ACA, OFCCP, Family & Medical Leave, Payroll Regs/Legs Updates, OSHA, I-9, EEO-1, W4, Data Privacy, eSocial, Legislative Blog, Advisory Webcasts, Payroll Community on My Oracle Support…

- **Empowering Administrators**

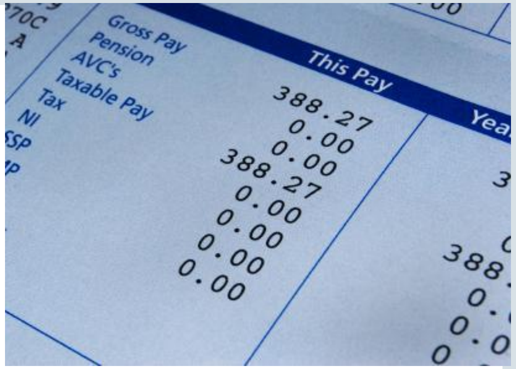
  Fluid Simplified Analytics, Related Actions, Related Content, Fluid Activity Guides for Job Data/Person Data and Position Management, Fluid WorkCenters…

- **Configuration over Customization**

  Activity Guides, Page Composer for Fluid Approvals, Page & Field Configurator, Event Mapping, Drop Zones, Attachment Framework, Consent Framework…

Copyright © 2018, Oracle and/or its affiliates. All rights reserved. | Restricted to event use only.

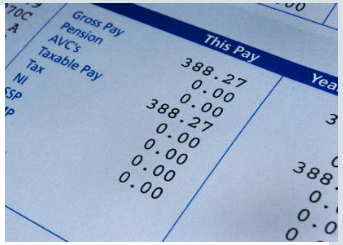
Compliance – Payroll Impact


Gross Pay
Pension
AVC's
Taxable Pay
Tax
NI
SSP
This Pay
388.27
0.00
0.00
388.27
0.00
0.00
0.00
0.00
0.00

- ✓ DC Paid Family Leave
- ✓ Massachusetts Paid Family and Medical Leave
- ✓ Washington Paid Family and Medial Leave Quarterly Reporting
- 2020 W-4 Withholding Forms (late 2019*)
  - New form and calculation methods
  - Targeting for 19-E and Special Posting PRP
- EEO-1 Component 2 Reporting (coming soon*)
- Check Payroll Hot Topics for posting information and links (MOS ID = 1348833.1

*** Estimates only. Oracle Safe Harbor Statement Applies**

Paysheet Update Load for Inactive Employees



- #1 on Ideas Space
- Proposed configurable setup allows customers to define their own parameters
  - Allowable employee inactive statuses
  - Define Paysheet sources for inactive employees
  - Define earnings that can be paid to inactive employees
  - Define allowable deductions that can be taken from inactive employees
  - Define company/paygroup eligible for program

Fluid Position Management

https://www.youtube.com/watch?v=g08u63VkZO8

Functionality Enhancements

- New Position Management dashboard
- Position Administration Navigation Collection
- Configurable Search
- Review changes before submit
- Leverage Related Content
- Quick Review of Position History

Effective Sequencing

- Multiple Updates on Same Effective Date
- Simultaneous Employee Transactions
- Minimize loss of data while using Correct History

66%+ of You use Position Management

Fluid Approvals (AWE)

- Route new position request or update position requests for approval
- Approve / Deny / Pushback the requests
- Configurable approval definitions
- Add one or more attachments
- Route attachments with approvals

Modern User Experience

- Fluid User Interface for searching a position
- Fluid guided process for creating, updating, and cloning positions
- Optimize data entry by using Activity Guide Composer Page and Field Configurator to limit steps and fields for data entry

Configuration Tools

Copyright © 2018, Oracle and/or its affiliates. All rights reserved. | Confidential – Oracle Internal/Restricted

Configuration vs. Customization – The Big 4

AVOID Customization

- **Page & Field Configurator**
  - Metadata captured to define common changes to pages
  - Generates AppClass PeopleCode assigned to Components through Event Mapping
  - Works with existing components
- **Approvals Page Composer**
  - PeopleTools provided utility used to allow end-user page design of a fluid component
  - Built specifically for Approvals
  - Will not work with any Classic or non-Page Composer based Fluid Component

ISOLATE Customizations

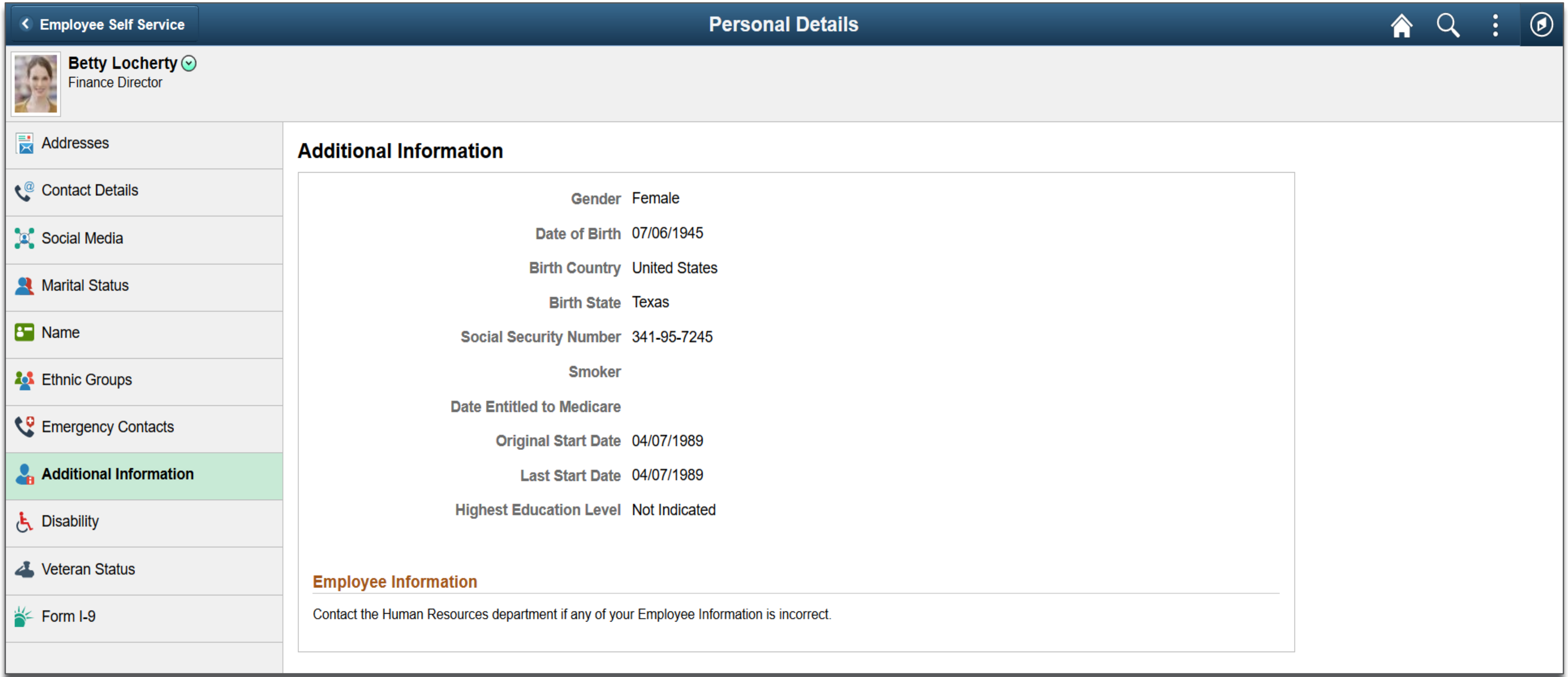
- **Drop Zones**
  - Area on Fluid Pages that will be bypassed by standard LCM compare process
  - Framework to add custom fields
  - Works on existing pages but is limited
  - Only used for customizations
- **Event Mapping**
  - AppClass methods run before or after built-in exit points
  - Complete access to Component Buffer
  - Assigned through existing Related Content Framework

What are Drop Zones?

- Delivered, pre-defined areas on Fluid pages
- Available on most delivered Fluid pages at Top & Bottom*
- Ability to embed custom content directly on a transaction Fluid page
- Managed as configuration, not as a traditional customization
- Potential Use Cases
  - Add text to a Fluid page (i.e., special instructions, text, reminders)
  - Add related information (i.e., institutional policies, additional links)
  - Add data entry (i.e., additional fields)

Drop Zone - Steps

Before



Employee Self Service
Personal Details

Betty Locherty
Finance Director

Addresses
Contact Details
Social Media
Marital Status
Name
Ethnic Groups
Emergency Contacts
Additional Information
Disability
Veteran Status
Form I-9

Additional Information

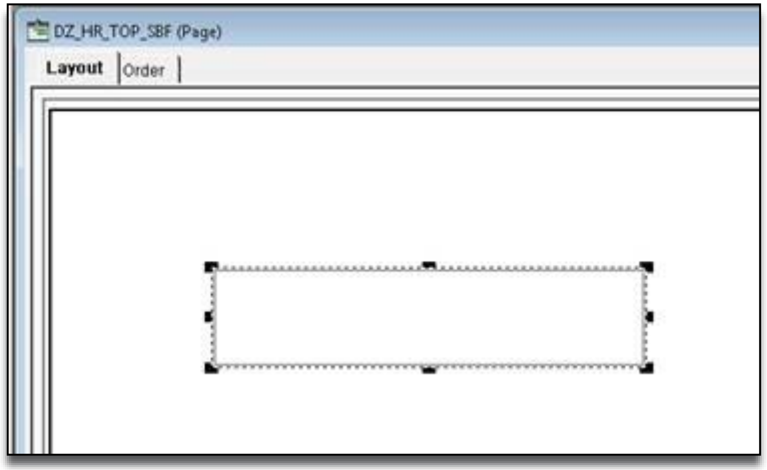
Gender	Female
Date of Birth	07/06/1945
Birth Country	United States
Birth State	Texas
Social Security Number	341-95-7245
Smoker	
Date Entitled to Medicare	
Original Start Date	04/07/1989
Last Start Date	04/07/1989
Highest Education Level	Not Indicated

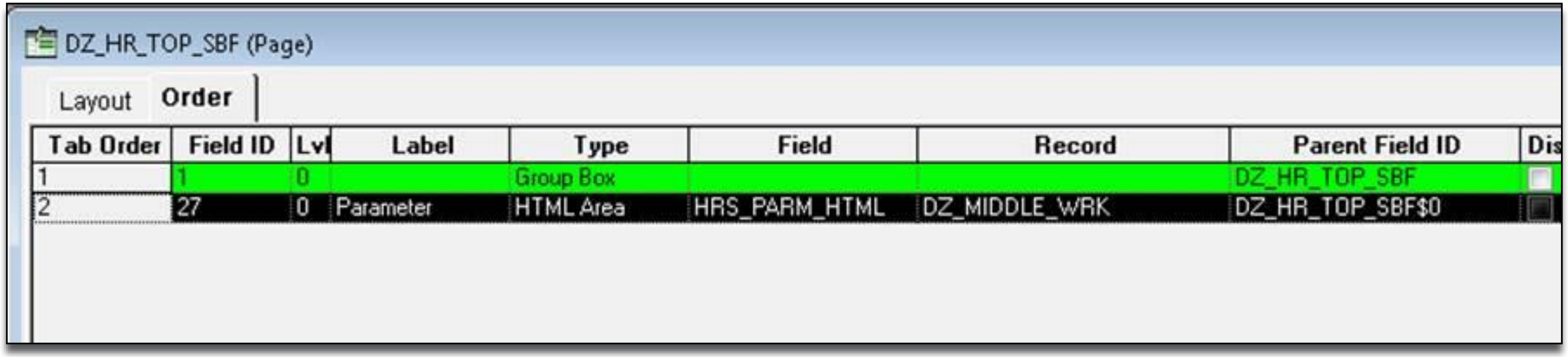
Employee Information

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

Drop Zone - Steps

Use/Create a Subpage - TOP

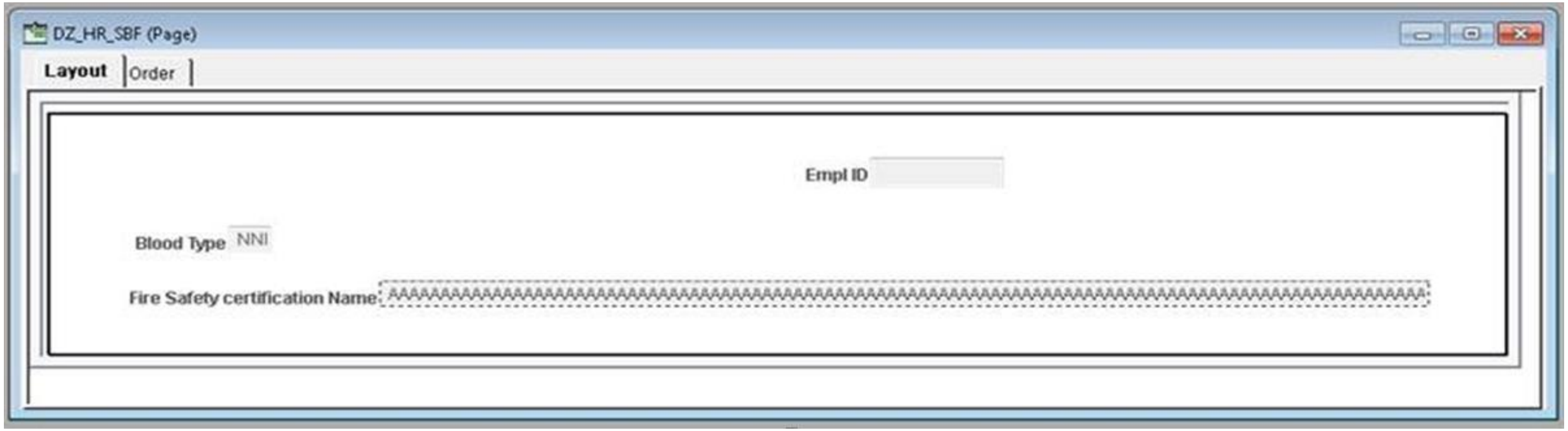

DZ_HR_TOP_SBF (Page)
Layout
Order

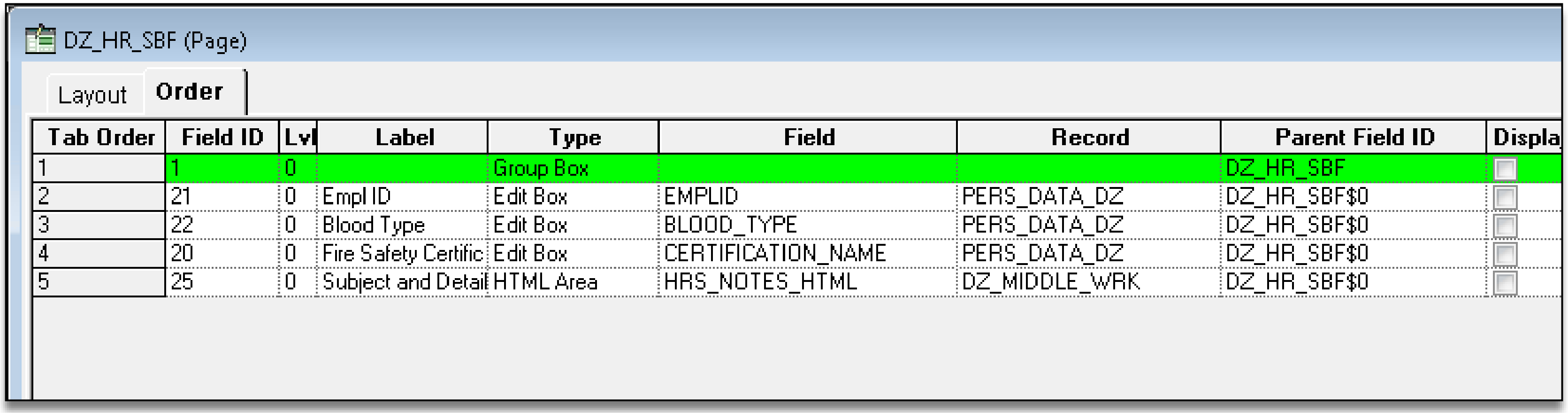

DZ_HR_TOP_SBF (Page)
Layout
Order

Tab Order	Field ID	Lvl	Label	Type	Field	Record	Parent Field ID	Dis
1	1	0		Group Box			DZ_HR_TOP_SBF	☐
2	27	0	Parameter	HTML Area	HRS_PARM_HTML	DZ_MIDDLE_WRK	DZ_HR_TOP_SBF$0	☐

Drop Zone - Steps

Use/Create a Subpage - MIDDLE

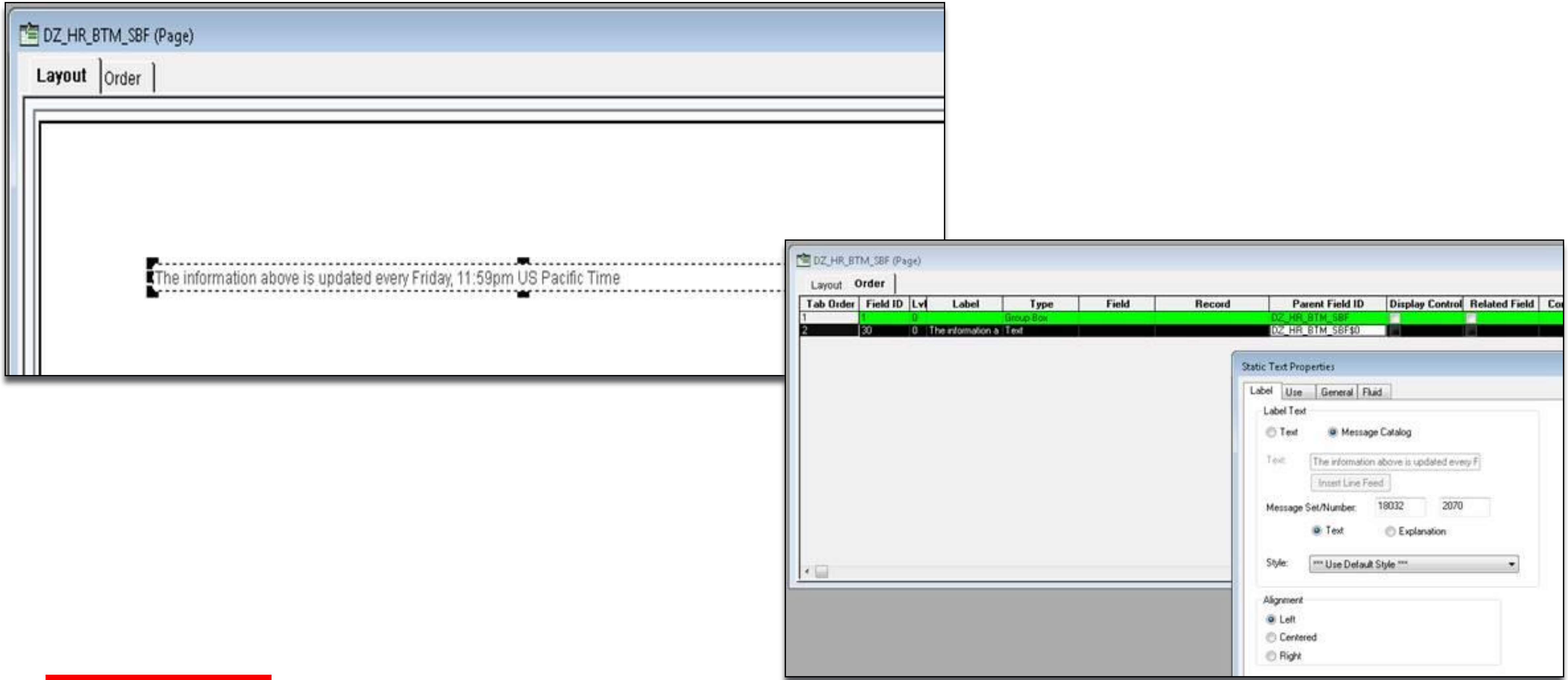

DZ_HR_SBF (Page)
Layout
Order
Empl ID
Blood Type
NNI
Fire Safety certification Name


DZ_HR_SBF (Page)
Layout
Order

Tab Order	Field ID	Lvl	Label	Type	Field	Record	Parent Field ID	Displa
1	1	0		Group Box			DZ_HR_SBF	☐
2	21	0	Empl ID	Edit Box	EMPLID	PERS_DATA_DZ	DZ_HR_SBF$0	☐
3	22	0	Blood Type	Edit Box	BLOOD_TYPE	PERS_DATA_DZ	DZ_HR_SBF$0	☐
4	20	0	Fire Safety Certific	Edit Box	CERTIFICATION_NAME	PERS_DATA_DZ	DZ_HR_SBF$0	☐
5	25	0	Subject and Detail	HTML Area	HRS_NOTES_HTML	DZ_MIDDLE_WRK	DZ_HR_SBF$0	☐

Drop Zone - Steps

Use/Create a Subpage - BOTTOM



DZ_HR_BTM_SBF (Page)

Layout
Order

The information above is updated every Friday, 11:59pm US Pacific Time

DZ_HR_BTM_SBF (Page)

Layout
Order

Tab Order	Field ID	Lvl	Label	Type	Field	Record	Parent Field ID	Display Control	Related Field	Co
1	1	0		Group Box			DZ_HR_BTM_SBF	☐	☐	
2	30	0	The information a	Text			DZ_HR_BTM_SBF$0	☐	☐	

Static Text Properties

Label
Use
General
Fluid

Label Text

○ Text ● Message Catalog

Text: The information above is updated every F

Insert Line Feed

Message Set/Number: 18032 2070

● Text ○ Explanation

Style: *** Use Default Style ***

Alignment

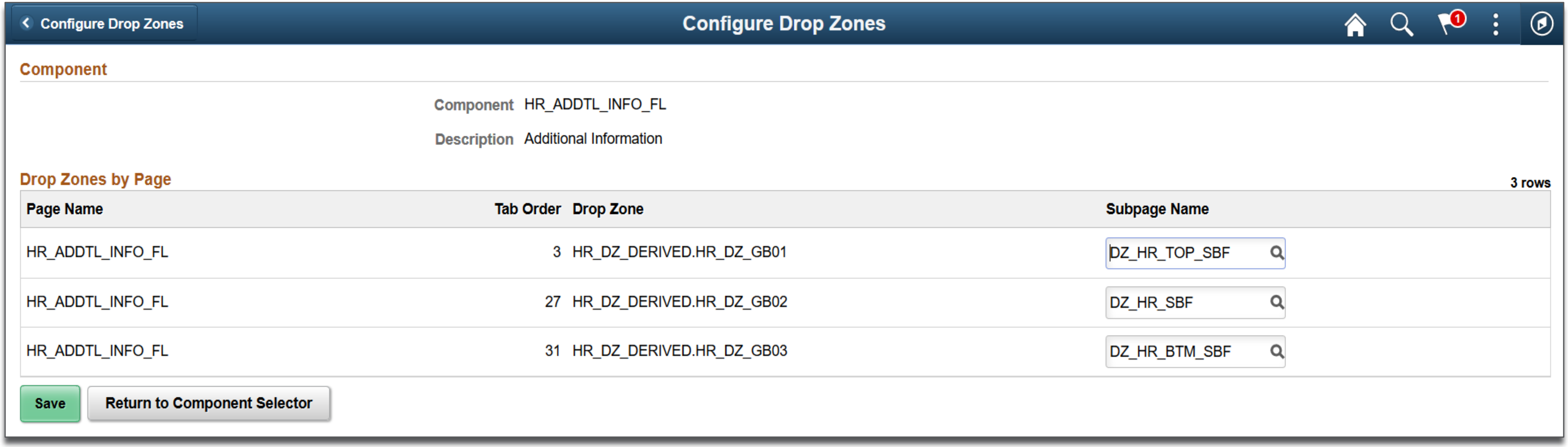
● Left

○ Centered

○ Right

Drop Zone - Steps

Associate Subpage to Drop Zone within Component


Configure Drop Zones
Configure Drop Zones
1

Component

Component HR_ADDTL_INFO_FL

Description Additional Information

Drop Zones by Page

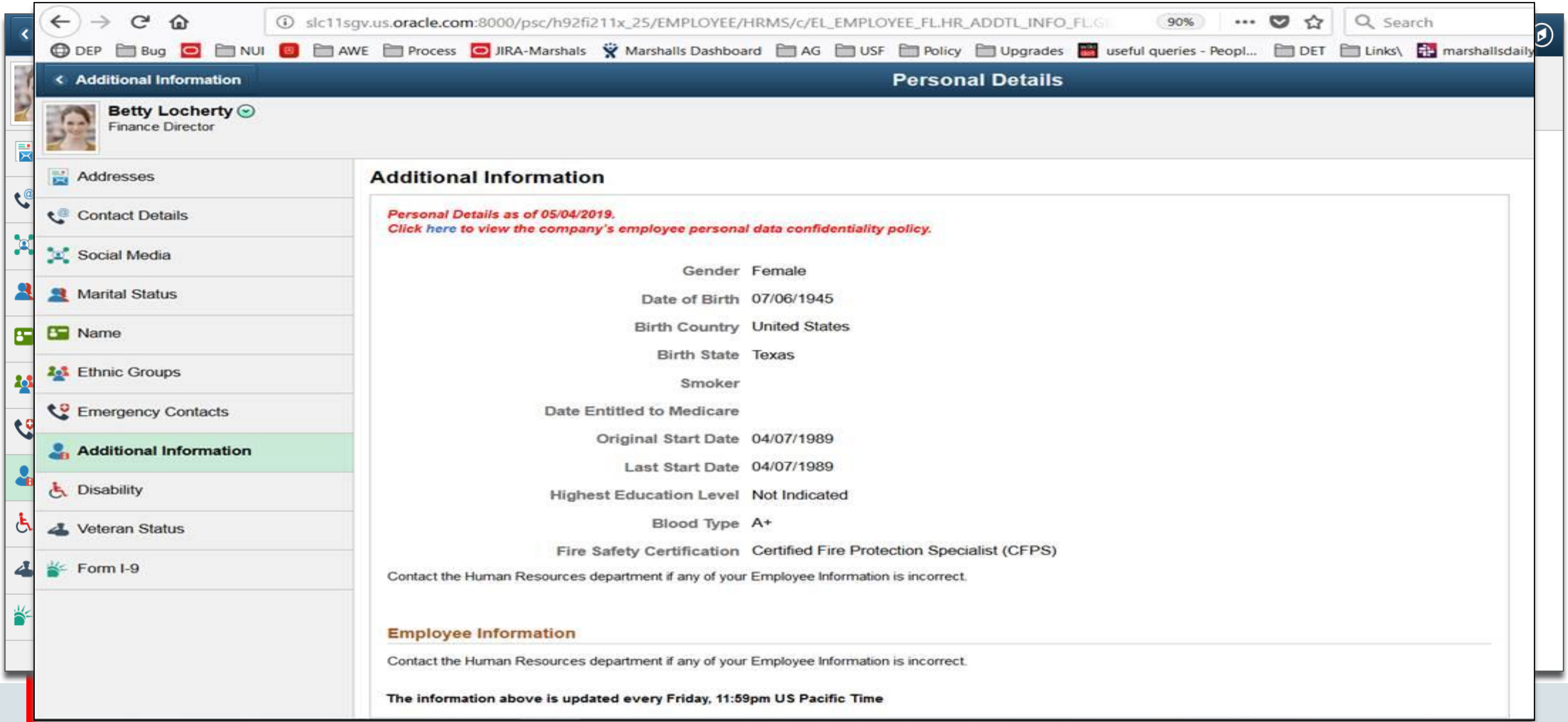
3 rows

Page Name	Tab Order	Drop Zone	Subpage Name
HR_ADDTL_INFO_FL	3	HR_DZ_DERIVED.HR_DZ_GB01	DZ_HR_TOP_SBF
HR_ADDTL_INFO_FL	27	HR_DZ_DERIVED.HR_DZ_GB02	DZ_HR_SBF
HR_ADDTL_INFO_FL	31	HR_DZ_DERIVED.HR_DZ_GB03	DZ_HR_BTM_SBF

Save
Return to Component Selector

Drop Zone - Steps

Before & After


slc11sgv.us.oracle.com:8000/psc/h92fi211x_25/EMPLOYEE/HRMS/c/EL_EMPLOYEE_FL.HR_ADDTL_INFO_FL.G
90%
Search
DEP
Bug
NUI
AWE
Process
JIRA-Marshals
Marshalls Dashboard
AG
USF
Policy
Upgrades
useful queries - Peopl...
DET
Links\
marshallsdaily
Additional Information
Personal Details
Addresses
Contact Details
Social Media
Marital Status
Name
Ethnic Groups
Emergency Contacts
Additional Information
Disability
Veteran Status
Form I-9

Betty Locherty
Finance Director

Additional Information

Personal Details as of 05/04/2019.
Click here to view the company's employee personal data confidentiality policy.

Gender: Female
Date of Birth: 07/06/1945
Birth Country: United States
Birth State: Texas
Smoker:
Date Entitled to Medicare:
Original Start Date: 04/07/1989
Last Start Date: 04/07/1989
Highest Education Level: Not Indicated
Blood Type: A+
Fire Safety Certification: Certified Fire Protection Specialist (CFPS)

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

Employee Information

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

The information above is updated every Friday, 11:59pm US Pacific Time

PeopleSoft Resources

On Line
Resources

Copyright © 2018, Oracle and/or its affiliates. All rights reserved. | Confidential – Oracle Internal/Restricted

PeopleSoft HCM Focus Groups

- 20+ HCM Focus Groups - https://questoraclecommunity.org/peoplesoft-hcm-focus-groups
- Cross Pillar
  - PeopleSoft Test Framework
  - Approvals & Delegation
- PeopleSoft HCM Customer Advisory Board

  https://questoraclecommunity.org/peoplesoft-hcm-customer-advisory-board/

ORACLE

Your PeopleSoft Application Sales Contacts

ORACLE
Applications Unlimited

- Interested in purchasing PeopleSoft applications?
- Want to expand your PeopleSoft usage?
- Need PeopleSoft licensing help?
- Want to know what you have licensed?

licensesales-naa_us@oracle.com

Peter Hogenson

Healthcare & Public Sector

Nicolas Chavez

Financial Services

ORACLE

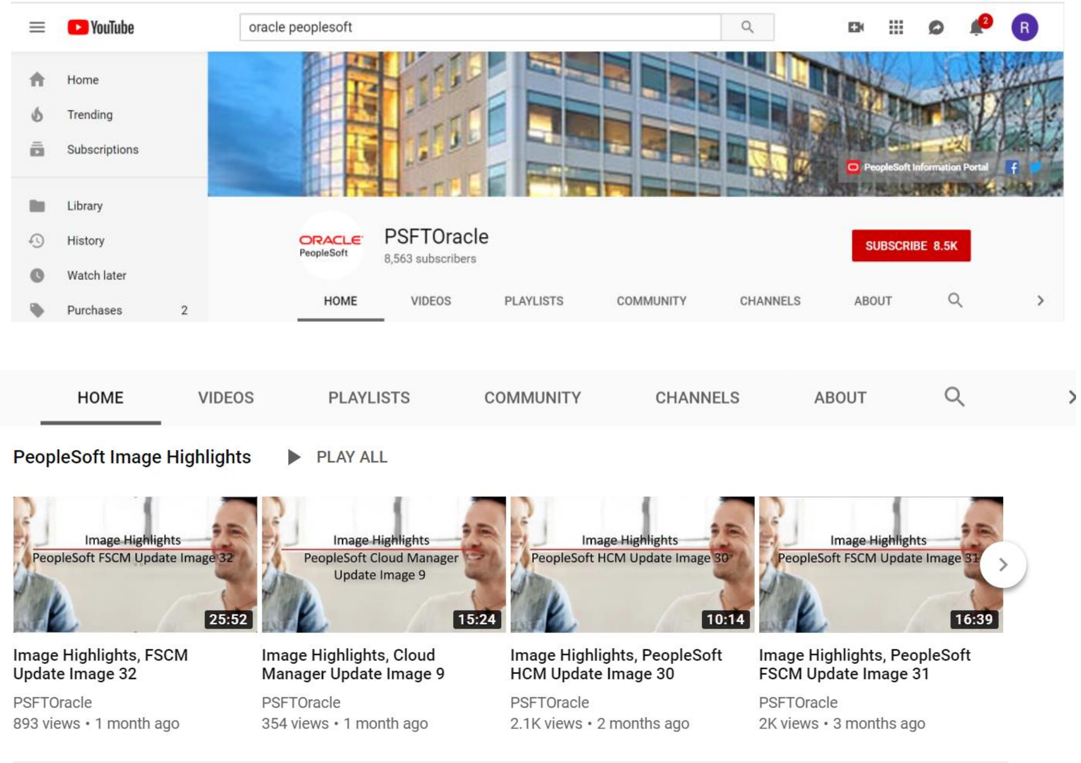
www.peoplesoftinfo.com

ORACLE PEOPLESOFT

PeopleSoft Key Concepts

PeopleSoft Customer Success and Innovation

PeopleSoft Information Portal


YouTube
oracle peoplesoft
Home
Trending
Subscriptions
Library
History
Watch later
Purchases 2
PeopleSoft Information Portal
ORACLE PeopleSoft
SUBSCRIBE 8.5K
HOME
VIDEOS
PLAYLISTS
COMMUNITY
CHANNELS
ABOUT
PLAY ALL
25:52
15:24
10:14
16:39

PSFTOracle
8,563 subscribers

PeopleSoft Image Highlights

Image Highlights, FSCM Update Image 32
PSFTOracle
893 views • 1 month ago

Image Highlights, Cloud Manager Update Image 9
PSFTOracle
354 views • 1 month ago

Image Highlights, PeopleSoft HCM Update Image 30
PSFTOracle
2.1K views • 2 months ago

Image Highlights, PeopleSoft FSCM Update Image 31
PSFTOracle
2K views • 3 months ago

PeopleSoft YouTube Channel

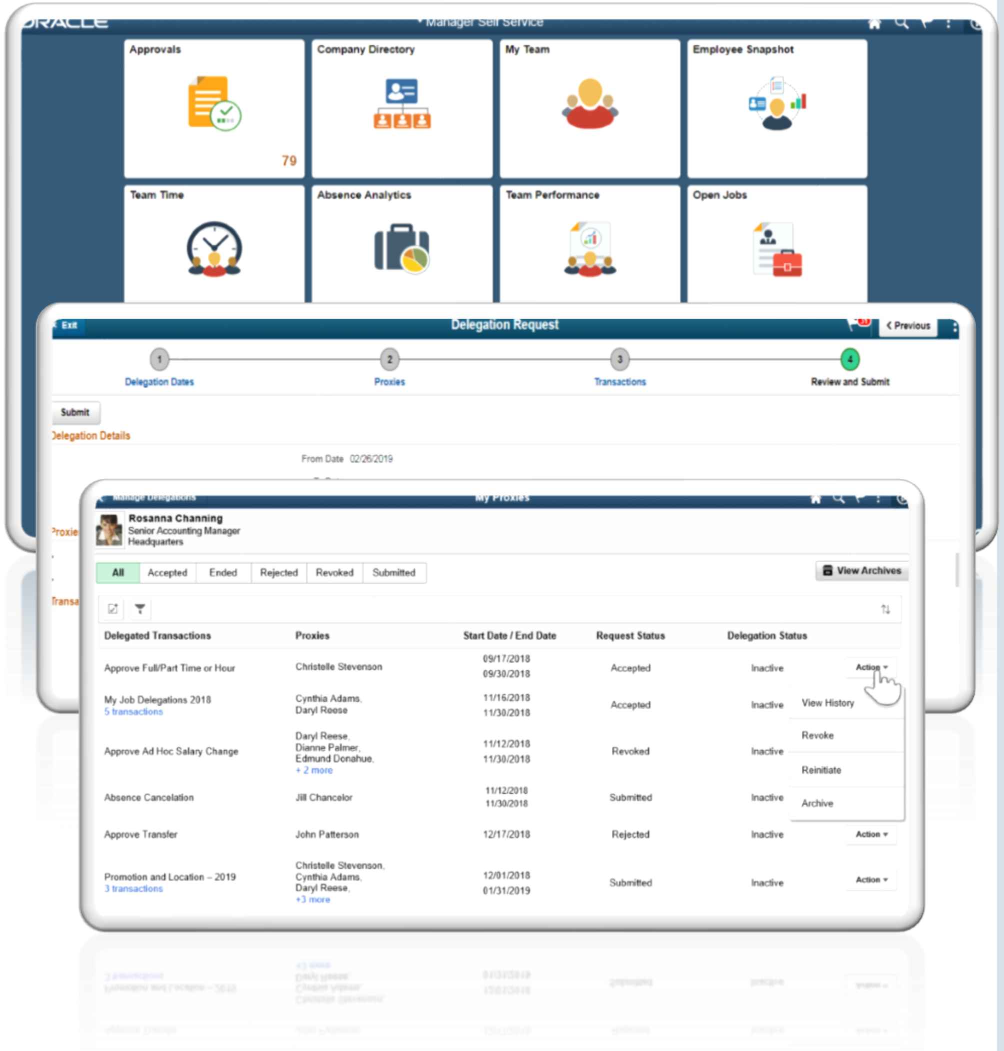
Copyright © 2018, Oracle and/or its affiliates. All rights reserved. | Confidential – Oracle Restricted

Notable HCM Roadmap Initiatives

- More Chatbots
- Fluid Profile Management Search, Match & Compare
- Leverage Page & Field Configurator for Data Privacy
- Modernization of Job and Personal Data
- Updated Fluid Design
- Kibana Data Visualization (elastic.co/products/kibana)
- Text Notifications
- PeopleTools 8.58

New Delegation Framework

- Compatile Accross Pillars (in a clustered environment)
- Quick Search Capabilities for Proxies
- Select Multiple Proxies and Transactions at Once to be delegated
- Provide Delegators visibility into the actions performed by Proxies
- Configurable Cascading Delegation Authority
- Support for existing classic delegation requests after moving to Fluid


Manager Self Service
Approvals
79
Company Directory
My Team
Employee Snapshot
Team Time
Absence Analytics
Team Performance
Open Jobs
Exit
Delegation Request
Previous
1
Delegation Dates
2
Proxies
3
Transactions
4
Review and Submit
Submit
Manage Delegations
My Proxies
All
Accepted
Ended
Rejected
Revoked
Submitted
View Archives
View History
Revoke
Reinitiate
Archive

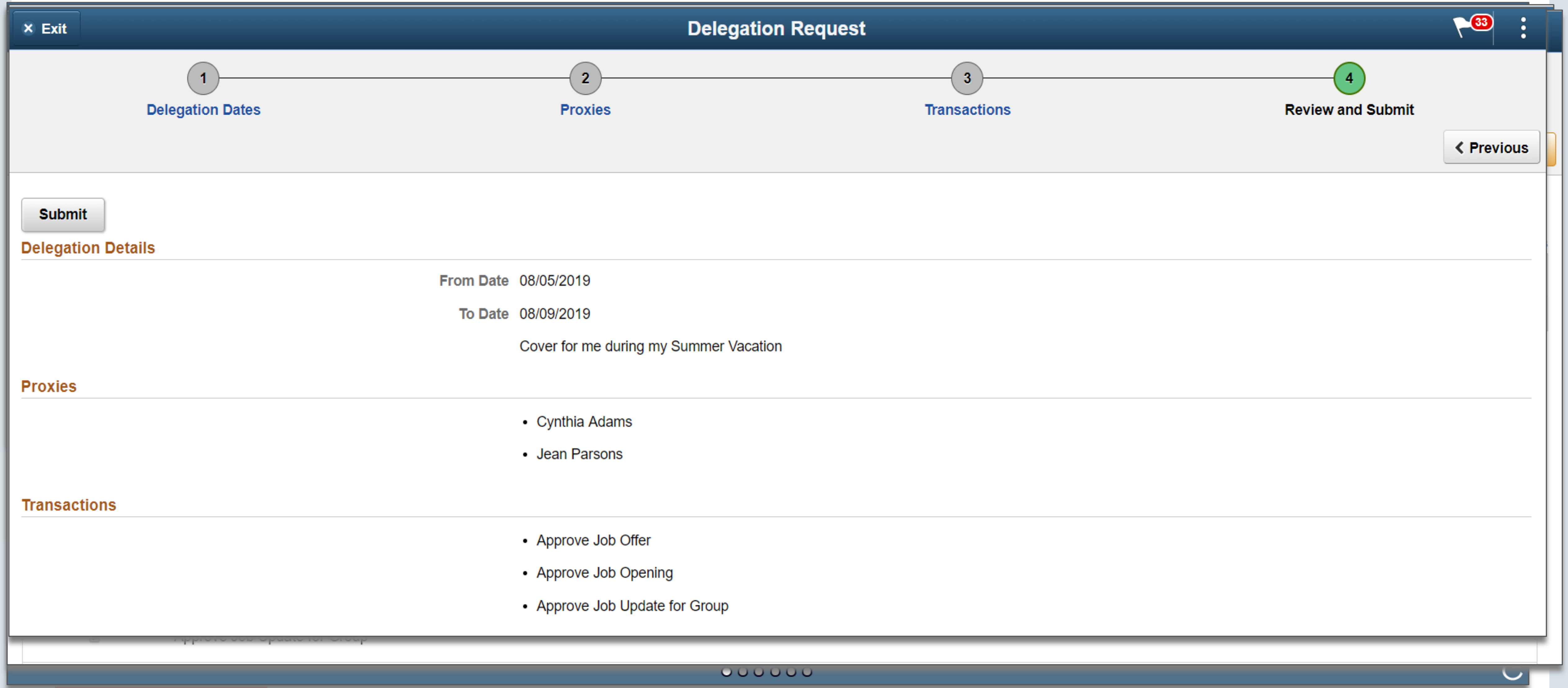
Delegation Details

From Date 02/26/2019

Rosanna Channing
Senior Accounting Manager
Headquarters

Delegated Transactions	Proxies	Start Date / End Date	Request Status	Delegation Status	
Approve Full/Part Time or Hour	Christelle Stevenson	09/17/2018 09/30/2018	Accepted	Inactive	Action ▾
My Job Delegations 2018 5 transactions	Cynthia Adams, Daryl Reese	11/16/2018 11/30/2018	Accepted	Inactive	
Approve Ad Hoc Salary Change	Daryl Reese, Dianne Palmer, Edmund Donahue, + 2 more	11/12/2018 11/30/2018	Revoked	Inactive	
Absence Cancelation	Jill Chancelor	11/12/2018 11/30/2018	Submitted	Inactive	
Approve Transfer	John Patterson	12/17/2018	Rejected	Inactive	Action ▾
Promotion and Location – 2019 3 transactions	Christelle Stevenson, Cynthia Adams, Daryl Reese, +3 more	12/01/2018 01/31/2019	Submitted	Inactive	Action ▾

New Delegation Framework



× Exit
Delegation Request
33
1 Delegation Dates
2 Proxies
3 Transactions
4 Review and Submit
< Previous
Submit

Delegation Details

From Date 08/05/2019

To Date 08/09/2019

Cover for me during my Summer Vacation

Proxies

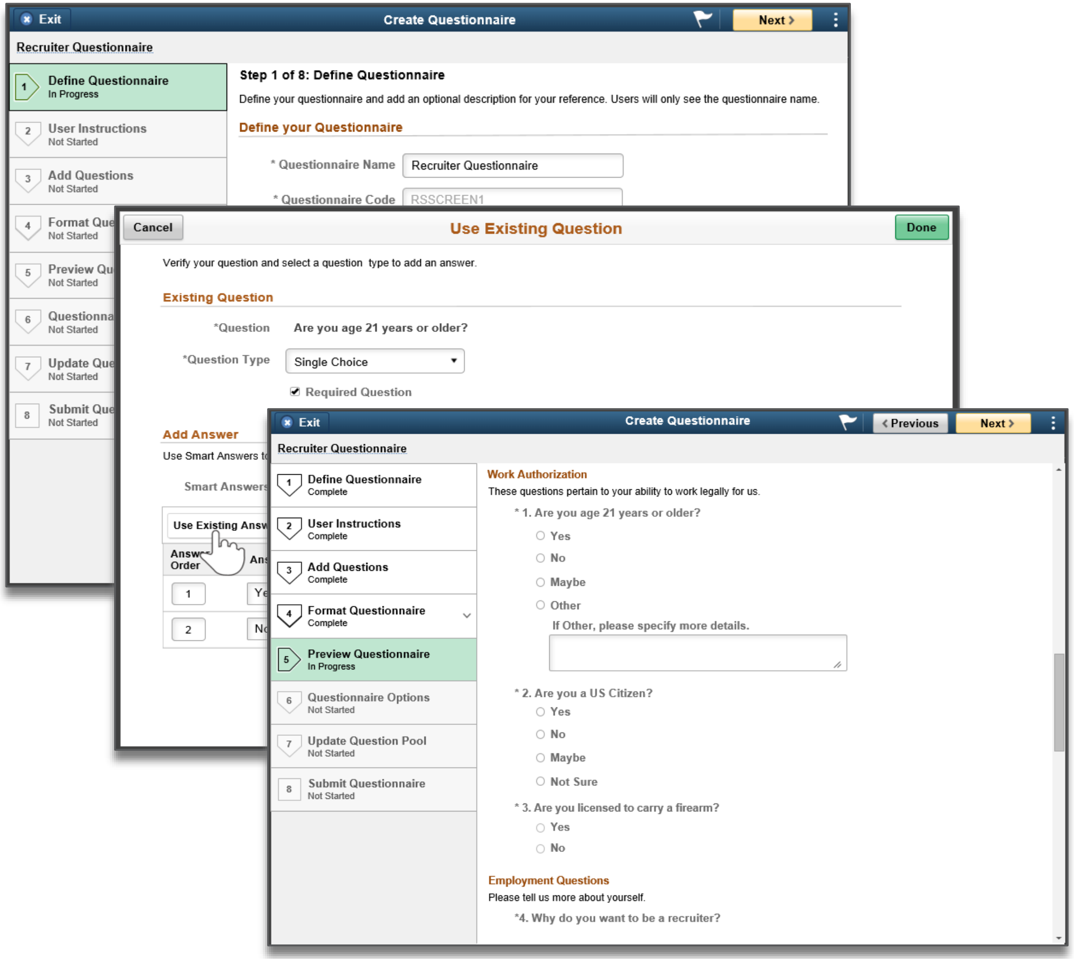
- Cynthia Adams
- Jean Parsons

Transactions

- Approve Job Offer
- Approve Job Opening
- Approve Job Update for Group

Questionnaire Framework

Survey Your Employees During Transactions


Exit
Create Questionnaire
Next
Recruiter Questionnaire
1 Define Questionnaire In Progress
2 User Instructions Not Started
3 Add Questions Not Started
4 Format Que Not Started
5 Preview Qu Not Started
6 Questionna Not Started
7 Update Que Not Started
8 Submit Que Not Started

Step 1 of 8: Define Questionnaire

Define your questionnaire and add an optional description for your reference. Users will only see the questionnaire name.

Define your Questionnaire

* Questionnaire Name: Recruiter Questionnaire

* Questionnaire Code: RSSCREEN1

Cancel
Use Existing Question
Done

Verify your question and select a question type to add an answer.

Existing Question

*Question: Are you age 21 years or older?

*Question Type: Single Choice

☑ Required Question

Add Answer

Use Smart Answers t

Smart Answers
Use Existing Answ
Answer Order
Ans
1
Ye
2
No
Exit
Create Questionnaire
Previous
Next
Recruiter Questionnaire
1 Define Questionnaire Complete
2 User Instructions Complete
3 Add Questions Complete
4 Format Questionnaire Complete
5 Preview Questionnaire In Progress
6 Questionnaire Options Not Started
7 Update Question Pool Not Started
8 Submit Questionnaire Not Started

Work Authorization

These questions pertain to your ability to work legally for us.

* 1. Are you age 21 years or older?

○ Yes
○ No
○ Maybe
○ Other

If Other, please specify more details.

* 2. Are you a US Citizen?

○ Yes
○ No
○ Maybe
○ Not Sure

* 3. Are you licensed to carry a firearm?

○ Yes
○ No

Employment Questions

Please tell us more about yourself.

*4. Why do you want to be a recruiter?

- Show a survey as a step in an Activity Guide
- Embedded in OnBoarding and Life Events
- Configurable Survey Options
  - Share a Pool of Questions & Answers
  - Pre-defined Common (Smart) Answers
  - Create or Group questions on the fly
  - Randomize Questions or Answers
  - Anonymize Survey Results
  - Single Choice, Multiple Choice, Ranking, Open Ended Questions

Copyright © 2018, Oracle and/or its affiliates. All rights reserved. | Confidential – Oracle Internal/Restricted/Highly Restricted

Customer Survey

https://tinyurl.com/pspoithcmi31

Scan me

http://150.136.221.134:8000/psp/peoplesoft01/EMPLOYEE/HRMS/?cmd=login

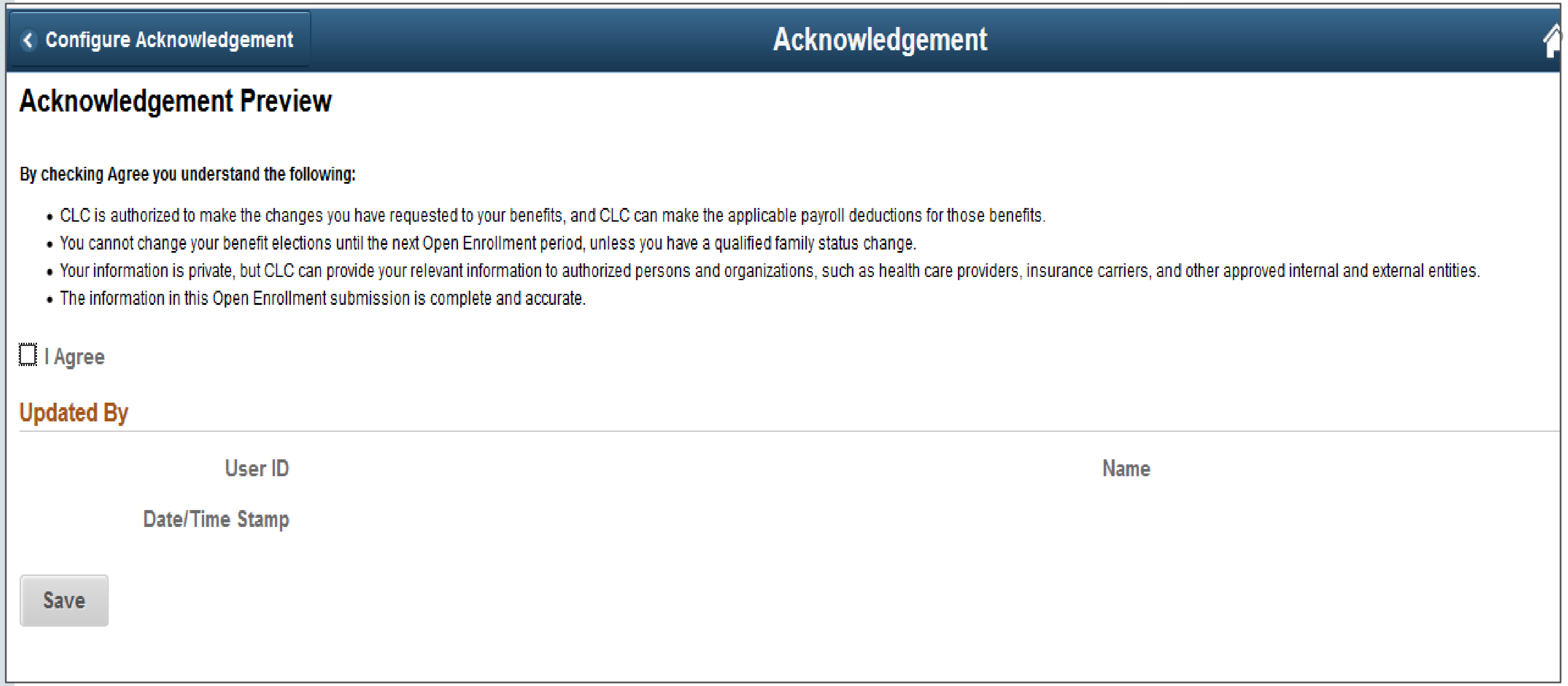
Appendix

(the rest of Kim Landmann's Slides to follow)

Challenges of Fluid Open Enrollment

- Security
  - PeopleBooks very helpful on page and role security needed
  - We do not normally use delivered roles, but had to for setup
    - IT thinks there are PeopleCode references to the delivered roles for the AG setup to work
  - Delivered roles needed to build activity guide:
    - AG Composer Administrator
    - PTAI_Administrator
  - Also added two web libraries to a custom permission list in our standard employee role. This was to replace the delivered PTPT1000
    - WEBLIB_PTAI
    - WEBLIB_PTPPB
  - This is not a problem if you have delivered

Challenges of Fluid OE Continued…



Acknowledgement Preview

By checking Agree you understand the following:

- CLC is authorized to make the changes you have requested to your benefits, and CLC can make the applicable payroll deductions for those benefits.
- You cannot change your benefit elections until the next Open Enrollment period, unless you have a qualified family status change.
- Your information is private, but CLC can provide your relevant information to authorized persons and organizations, such as health care providers, insurance carriers, and other approved internal and external entities.
- The information in this Open Enrollment submission is complete and accurate.

☐ I Agree

Updated By

User ID

Name

Date/Time Stamp

Acknowledgement Framework

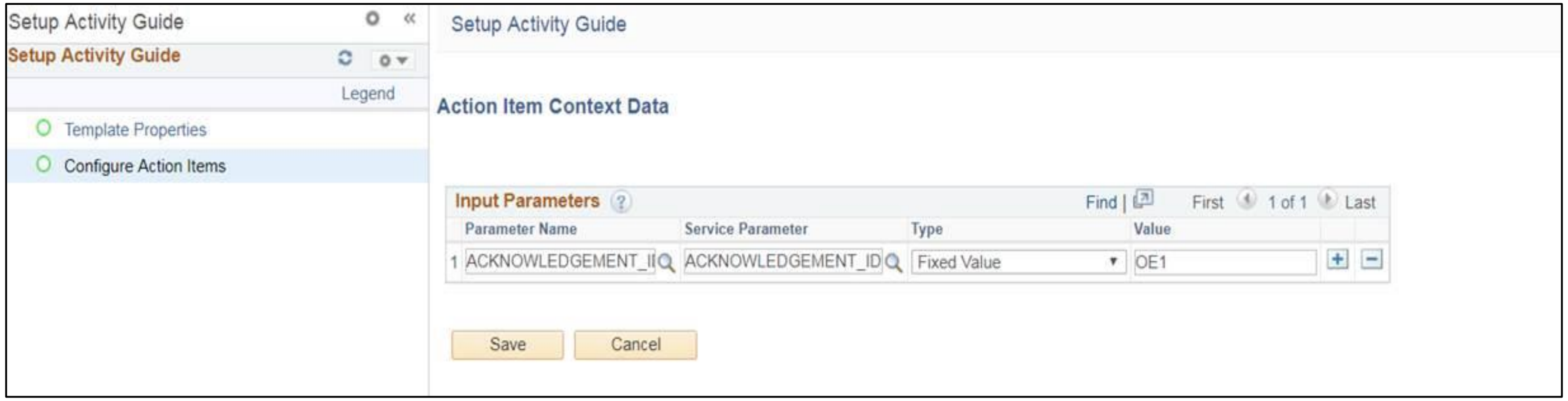
- Not necessary, but I wanted it ☺
- Effective date logic important
- Must set up before adding to category or template

College Lake County™
Connect to Your Future

ORACLE

Challenges of Fluid OE Continued…

- Acknowledgement Framework Bug
  - SR 3-19765816711 for bug related to Parameter Value
    - PeopleTools>Portal>Activity Guide>Manage Template
    - Parameter value does not auto-fill here as it should
    - Bug fix for PT 8.57/8.58
    - Below PT 8.57?
      - Add manually to this page


Setup Activity Guide
Setup Activity Guide
Legend
Template Properties
Configure Action Items
Setup Activity Guide
Save
Cancel

Action Item Context Data

Input Parameters Find | First 1 of 1 Last

	Parameter Name	Service Parameter	Type	Value
1	ACKNOWLEDGEMENT_I	ACKNOWLEDGEMENT_ID	Fixed Value	OE1

College Lake County
Connect to Your Future

ORACLE

First Things First

- Activity Guide Composer - Categories
  - Security
    - Must have delivered security role found in Administrator Role field to make changes
    - OR someone with delivered role could add a row and enter your custom role
  - Review/Update Categories
    - Updated parameter value for Acknowledgement under Steps
    - **IF** you don't want a Welcome Video in the Activity Guide
      - Go to WELCOME_VIDEO step
      - Update the Service ID
        - From: HC_AGC_VIDEO_FL
        - To: HC_ACG_INFO_FL

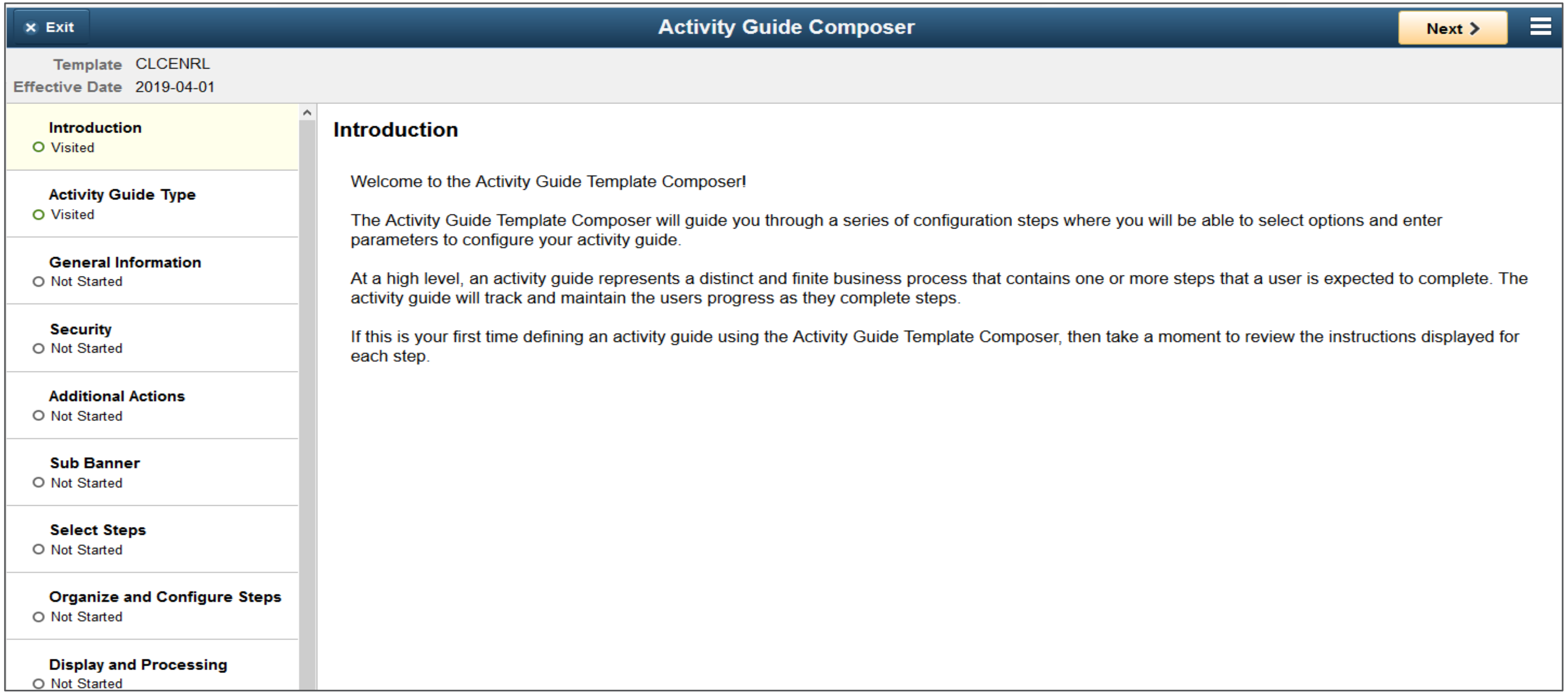
College Lake County™
Connect to Your Future

ORACLE®

First Things First Continued…

- Activity Guide Composer - Templates
  - Security
    - Clone delivered template ENROLLM
    - IT added my security role to security step for view and update access
  - Review/Update Template
    - Very simple
    - Guides you through steps (An Activity Guide within an Activity Guide)
    - Most steps left as delivered, except:
      - Sub Banner Step
        - Can add option to have an image
      - Select Steps Step
        - Can add Acknowledgement to ‘Select Steps’ step

First Things First Continued…


× Exit
Activity Guide Composer
Next >

Template CLCENRL
Effective Date 2019-04-01

Introduction
○ Visited
Activity Guide Type
○ Visited
General Information
○ Not Started
Security
○ Not Started
Additional Actions
○ Not Started
Sub Banner
○ Not Started
Select Steps
○ Not Started
Organize and Configure Steps
○ Not Started
Display and Processing
○ Not Started

Introduction

Welcome to the Activity Guide Template Composer!

The Activity Guide Template Composer will guide you through a series of configuration steps where you will be able to select options and enter parameters to configure your activity guide.

At a high level, an activity guide represents a distinct and finite business process that contains one or more steps that a user is expected to complete. The activity guide will track and maintain the users progress as they complete steps.

If this is your first time defining an activity guide using the Activity Guide Template Composer, then take a moment to review the instructions displayed for each step.

- Activity Guide walks you through the steps to create the AG Open Enrollment Template

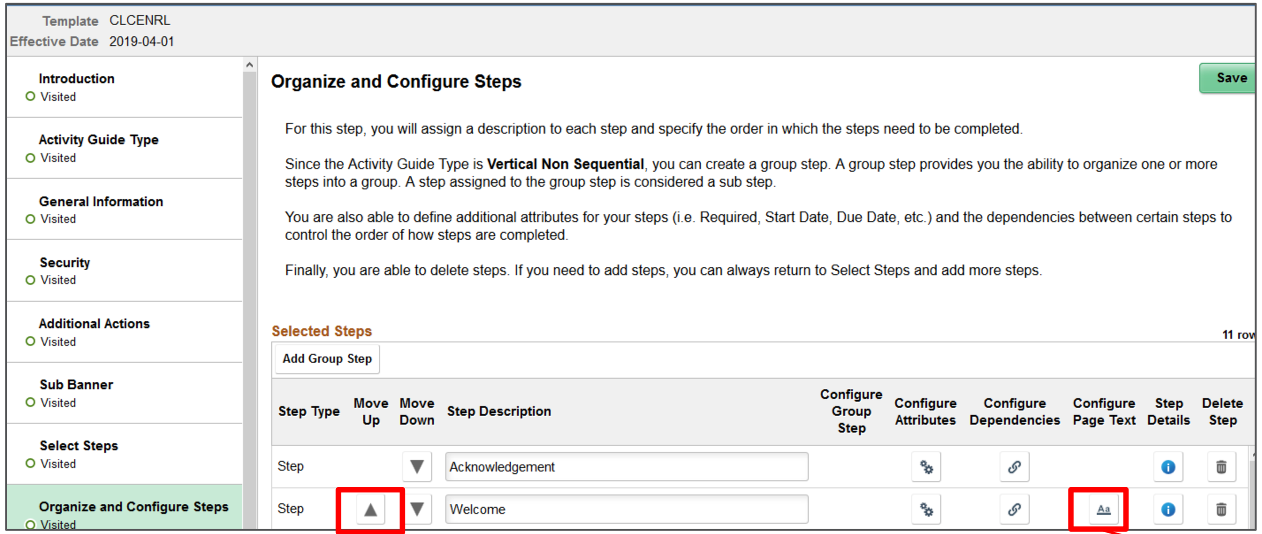
First Things First Continued…

- ‘Organize and Configure Steps’ Step
  - Allows you to:
    - Assign Order
    - Group Steps
    - Update Step Descriptions:
      - Changed Home and Mailing Address to Home Address
    - Configure Page Text if applicable
      - Personalize with employee’s name
      - Include links
  - Save to Activate
  - **Yes, it is that easy!**

College Lake County
Connect to Your Future

ORACLE

First Things First Continued…



Template CLCENRL
Effective Date 2019-04-01

Introduction
Visited
Activity Guide Type
Visited
General Information
Visited
Security
Visited
Additional Actions
Visited
Sub Banner
Visited
Select Steps
Visited
Organize and Configure Steps
Visited
Save

Organize and Configure Steps

For this step, you will assign a description to each step and specify the order in which the steps need to be completed.

Since the Activity Guide Type is **Vertical Non Sequential**, you can create a group step. A group step provides you the ability to organize one or more steps into a group. A step assigned to the group step is considered a sub step.

You are also able to define additional attributes for your steps (i.e. Required, Start Date, Due Date, etc.) and the dependencies between certain steps to control the order of how steps are completed.

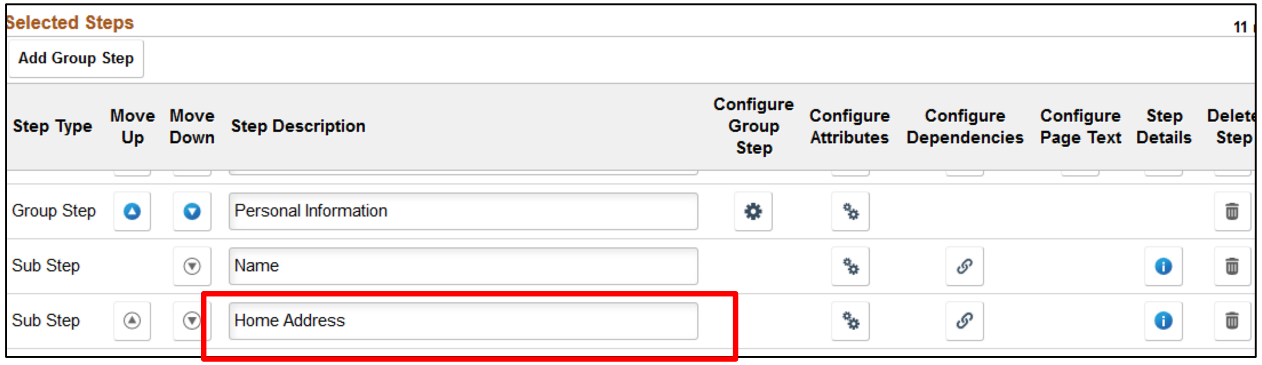
Finally, you are able to delete steps. If you need to add steps, you can always return to Select Steps and add more steps.

Selected Steps

11 rov

Add Group Step

Step Type	Move Up	Move Down	Step Description	Configure Group Step	Configure Attributes	Configure Dependencies	Configure Page Text	Step Details	Delete Step
Step		▼	Acknowledgement		⚙	🔗		ⓘ	🗑
Step	▲	▼	Welcome		⚙	🔗	Aa	ⓘ	🗑

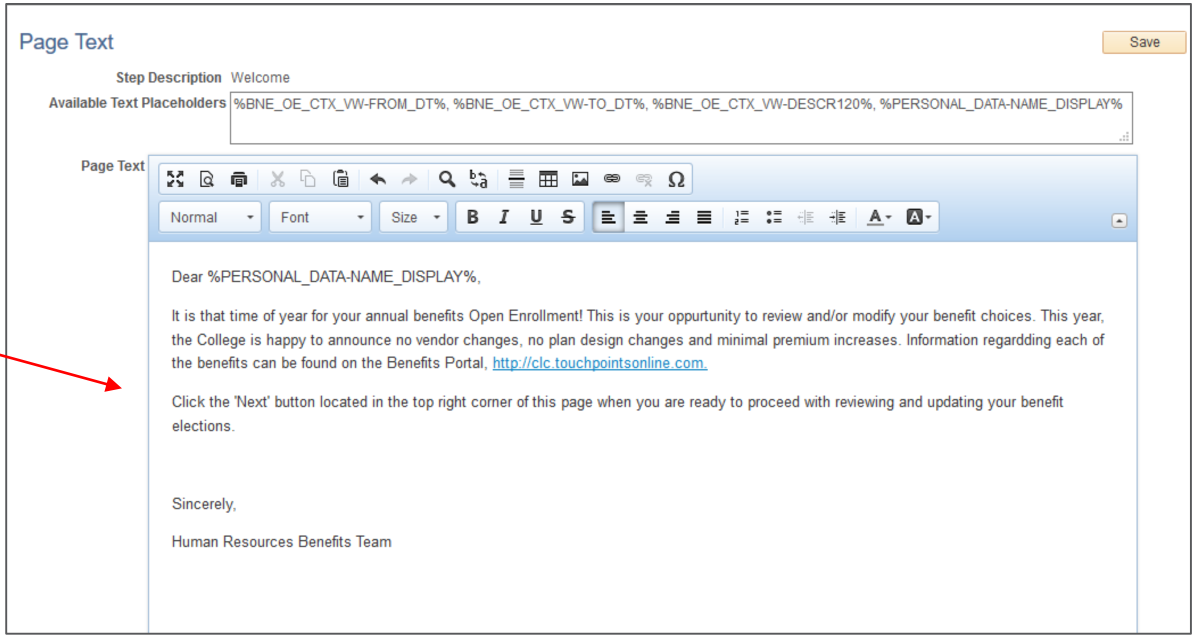


Selected Steps

11

Add Group Step

Step Type	Move Up	Move Down	Step Description	Configure Group Step	Configure Attributes	Configure Dependencies	Configure Page Text	Step Details	Delete Step
Group Step	▲	▼	Personal Information	⚙	⚙				🗑
Sub Step		▼	Name		⚙	🔗		ⓘ	🗑
Sub Step	▲	▼	Home Address		⚙	🔗		ⓘ	🗑



Page Text

Save

Step Description Welcome

Available Text Placeholders %BNE_OE_CTX_VW-FROM_DT%, %BNE_OE_CTX_VW-TO_DT%, %BNE_OE_CTX_VW-DESCR120%, %PERSONAL_DATA-NAME_DISPLAY%

Page Text

Normal
Font
Size
B
I
U
S

Dear %PERSONAL_DATA-NAME_DISPLAY%,

It is that time of year for your annual benefits Open Enrollment! This is your oppurtunity to review and/or modify your benefit choices. This year, the College is happy to announce no vendor changes, no plan design changes and minimal premium increases. Information regardding each of the benefits can be found on the Benefits Portal, http://clc.touchpointsonline.com.

Click the 'Next' button located in the top right corner of this page when you are ready to proceed with reviewing and updating your benefit elections.

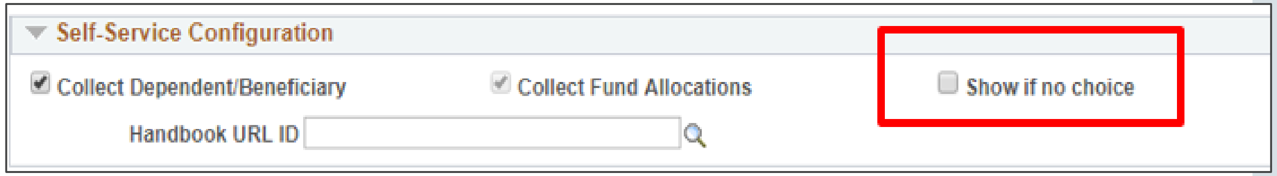
Sincerely,

Human Resources Benefits Team

College of Lake County
Connect to Your Future

ORACLE

Updates to Existing Pages



Self-Service Configuration

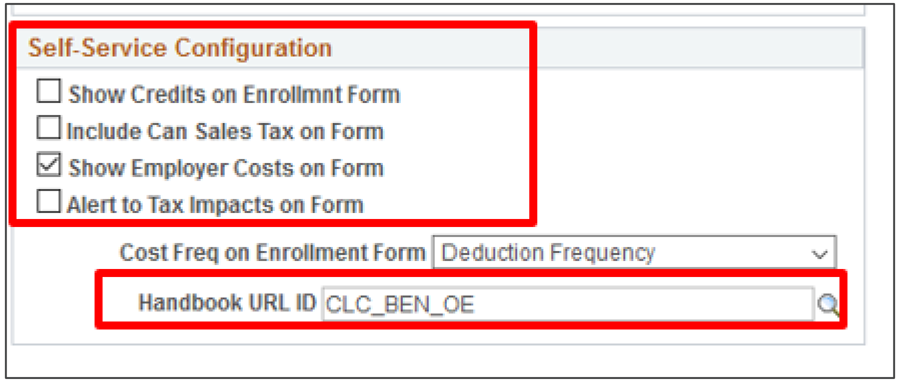
☑ Collect Dependent/Beneficiary

☑ Collect Fund Allocations

☐ Show if no choice

Handbook URL ID

- Benefit Program Structure
  - Unchecked ‘Show if No Choice’
    - Plan Type and Option tab>Self-Service Configuration
    - Removes Benefit Plan types from displaying in Activity Guide (i.e. we unchecked all life insurance options)
  - Checked ‘Show Employer Costs on Form’
    - Benefit Program tab>Self-Service Configuration
    - Allows employer costs to display in Activity Guide
    - Greater respect for cost of insurance
  - Added URL to the Handbook URL ID field
    - Benefit Program tab>Self-Service Configuration
    - A link to our OE website will display in the Supplemental panel
- **Ben Admin processes not impacted!!**



Self-Service Configuration

☐ Show Credits on Enrollmnt Form

☐ Include Can Sales Tax on Form

☑ Show Employer Costs on Form

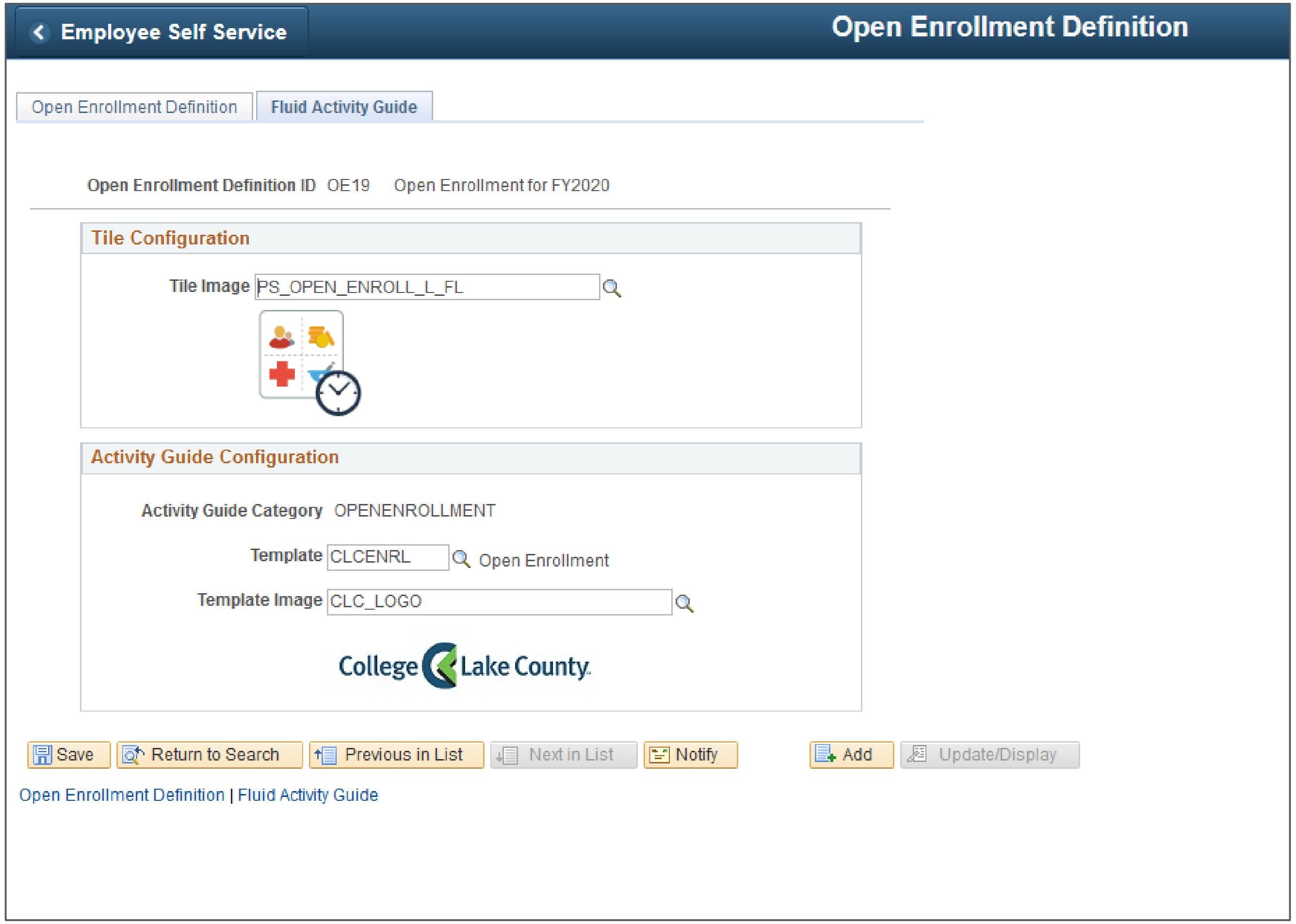
☐ Alert to Tax Impacts on Form

Cost Freq on Enrollment Form: Deduction Frequency

Handbook URL ID: CLC_BEN_OE

College of Lake County
Connect to Your Future

Updates to Existing Pages



Employee Self Service
Open Enrollment Definition
Open Enrollment Definition
Fluid Activity Guide
Save
Return to Search
Previous in List
Next in List
Notify
Add
Update/Display
Open Enrollment Definition | Fluid Activity Guide

Open Enrollment Definition ID OE19 Open Enrollment for FY2020

Tile Configuration

Tile Image PS_OPEN_ENROLL_L_FL

Activity Guide Configuration

Activity Guide Category OPENENROLLMENT

Template CLCENRL Open Enrollment

Template Image CLC_LOGO

College Lake County

- **Open Enrollment Definition**
  - Security to new tab called Fluid Activity Guide
  - Set up tile image (PS_OPEN_ENROLL_L_FL)
  - Attach template to open enrollment process
    - Make sure to pick the template you cloned and not the delivered one!
  - Include a template image
    - We added the CLC logo

College Lake County™
Connect to Your Future

ORACLE®

Current SR’s/Bugs I Found

- Current SR’s
  - SR 3-19765816711 – Acknowledgement Framework Not Working in OE Activity Guide
    - Fixed for PT 8.57/8.58
    - Can fix easily if below PT 8.57
  - SR 3-20066826201 – Total Cost for Employee and Employer inaccurate on Online statements.
    - Pulls in cost from plans I selected to not show on the benefit program table
    - Easy code fix
- Bugs
  - All Easy Code Fixes for our IT person
  - 29592291 – Fluid Ben Enrollment Employer Cost Displays as Annual Amt
    - PUM 31
  - 29767257 – Enrollment and Confirmation Statements not Showing Correct Service Date
    - PUM 31
  - 29711121 – Fluid Review Enrollment for 6X Plan Types Per Pay Period Costs Incorrect
    - PUM 31
  - 29779835 – Fluid Benefits Statements do not Display for Employee Rcd 1 Benr 1
    - PUM 32
  - Oracle has a comprehensive bug list out as well
  - https://support.oracle.com/epmos/faces/DocumentDisplay?id=2527623.1

College Lake County
Connect to Your Future

ORACLE