



## Employee Self Service Update

*January 19, 2011*

- Self Service Overview
- Self Service Demo
- Readiness Tasks
- Communications & Training
- Q & A

# Summary of Self Service Features



## Personal Information

- View or update name\*
- View or update mailing address\*
- View or update phone number\*
- View or update emergency contact(s)\*
- View or update email address  
*(employees with a state email should add their state email as their "business email" and mark it as "preferred")*
- View marital status

## Pay

- Add up to five direct deposit accounts\*
- View, add or change direct deposit account(s)\*
- Request W-2 reissue/reprint\*
- Update W-4 tax information\*
- View current pay rate, earnings and deductions
- View and print pay statements

## Benefits

- Receive helpful checklists and reminders via email\*
- Report life event changes (including marital status changes)
- Enroll in benefits
- View summary of current benefits
- Link to websites of benefits vendors

\***NEW** function being implemented in February 2011

- Drives employees' ownership of their personal information
- Convenient and easy to use
- Accessible from any computer with an internet connection and internet browser
- Streamlines HR processes
- Reduces duplicated effort, data errors and time for requests to be handled

# Self Service and myOhio



January

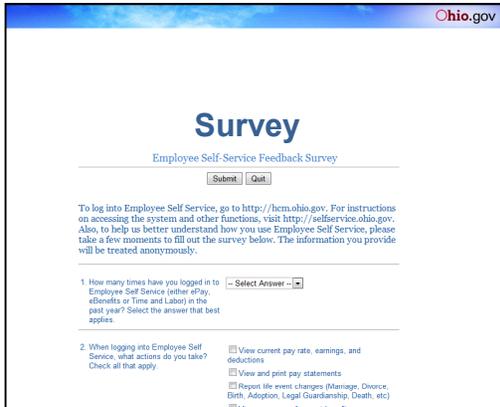


February



Summer

myOhio.gov



Directions to Self Service login



myOhio.gov



Links to Self Service login



myOhio.gov Portal



- First State of Ohio employee Portal
- Central site for statewide employee news, forms, policies, FAQs and more
- Single sign-on for Self Service

FOR DISCUSSION  
**DRAFT**  
PURPOSES ONLY

# Sign In Page Enhancements



**myOhio**

OAKS Status [Click Here](#)

**Sign in Now**

OAKS is a State of Ohio computer system, which may be accessed and used only for official state business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action.

User ID:

Password:

[Forgot your password?](#)

For instructions on accessing the system and other functions, visit [self-service](#)

**Welcome to Employee Self Service**

The **Self-Service** module is designed to allow State of Ohio employees to safely and securely manage certain portions of their personal information. Employees are able to view and print payroll and compensation information, including their leave balances. This module also allows employees to view and update their benefits records, including life events and open enrollment. With Employee Self-Service, employees can access their information anywhere.

Links to [ELM](#) and [Travel and Expense](#)

Hours of system availability:  
7:30 am - 5 pm Mon - Fri  
Unavailable Sat and Sun

**For assistance with your user ID or Password:**  
Please contact the OAKS Help Desk at:  
Phone: 1-888-OhioOAKS (1-888-644-6625)

**For assistance with Self Service options:**  
Please contact HR Customer Service at  
E-Mail: [HRCustomerService@das.state.oh.us](mailto:HRCustomerService@das.state.oh.us)  
Phone: 614-466-8857 or 1-800-409-1205

[System Availability](#)

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## Employees will be able to choose their communication preference in My System Profile...

Please indicate your preference for receiving the following communications:

Non-personalized benefits communications (e.g. Pathways):  E-Mail  US Mail

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# Agency HR: What's Changing ... What's Not?



*Below provides a summary of changes for Agency HR ...  
Some of these may or may not apply to your specific role*

| What's Changing                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | What's NOT Changing                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><u>W-2 Reissue Requests</u></p> <ul style="list-style-type: none"> <li>▪ Reduced paper request for W-2 reissues</li> </ul> <p><u>Employee Checklists</u></p> <ul style="list-style-type: none"> <li>▪ New checklists for name and address changes</li> </ul> <p><u>Reports/Queries</u></p> <ul style="list-style-type: none"> <li>▪ More available queries (list to be provided prior to go live)</li> </ul> <p><u>W-4 Changes</u></p> <ul style="list-style-type: none"> <li>▪ Paper forms no longer required for W-4 exemptions of 9 or below</li> </ul> | <p><u>Name Changes</u></p> <ul style="list-style-type: none"> <li>▪ Continue to submit Personnel Action forms and collect documentation for name changes</li> </ul> <p><u>Life Events</u></p> <ul style="list-style-type: none"> <li>▪ Continue to collect documentation for marital status changes and birth/adoption</li> </ul> <p><u>HR Checklists</u></p> <ul style="list-style-type: none"> <li>▪ Continue to manage the daily checklist</li> </ul> <p><u>Reports/Queries</u></p> <ul style="list-style-type: none"> <li>▪ Continue to run existing queries</li> </ul> <p><u>Security Roles</u></p> <ul style="list-style-type: none"> <li>▪ Maintain existing security roles and access</li> </ul> <p><u>Processing Schedules</u></p> <ul style="list-style-type: none"> <li>▪ No change to HR and payroll processing schedules</li> </ul> |

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## Employee Actions

1. Encourage employees to **log into the system**
2. Encourage employees to **set up a forgotten password help question**
3. Encourage employees to **add a valid business email address**

## HR Actions (on behalf of employees)

1. Update your employee's **business phone number**
2. Work with employees to **define their marital status** (send updated spreadsheet to Melissa Walpole)

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# Communications Plan Summary



- **Communications will be delivered in three phases**
  - Pre Go Live (Late November, 2010 to January, 2011)
    - Giving employees a “heads up” on Self Service changes
  - Go Live (February, 2011)
    - Provide detailed directions and job aids to employees on how to use new Self Service functions
  - Sustainment (Ongoing)
    - Remind employees of Self Service changes
  
- **Employee communication vehicles include:**
  - Letters mailed to employee homes
  - Unions ([www.1199seiu.org](http://www.1199seiu.org), [www.ocsea.org](http://www.ocsea.org), letters)
  - Pathways
  - [das.ohio.gov](http://das.ohio.gov)
  - Email through agencies
  - Posters displayed at agencies

***Your help is needed to distribute employee emails and posters at your agencies. Details to follow.***

# Communications Timeline



| January 2011 |                                              |         |                               |                                |             |                                  |
|--------------|----------------------------------------------|---------|-------------------------------|--------------------------------|-------------|----------------------------------|
| SUNDAY       | MONDAY                                       | TUESDAY | WEDNESDAY                     | THURSDAY                       | FRIDAY      | SATURDAY                         |
|              |                                              |         |                               |                                |             | 1<br>• 1199 SEIU website article |
| 2            | 3<br>• HCM Weekly<br>• OCSEA website article | 4       | 5                             | 6                              | 7<br>→<br>→ | 8                                |
| 9            | 10<br>• Pathways article                     | 11      | 12                            | 13<br>• JFS News Today article | 14          | 15                               |
| 16           | 17                                           | 18      | 19<br>• HR User Group meeting | 20                             | 21          | 22                               |
| 23           | 24                                           | 25      | 26                            | 27                             | 28          | 29                               |
| 30           | 31                                           |         |                               |                                |             |                                  |

# Communications Timeline Cont.



| February 2011 |                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                           |           |          |         |          |
|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|----------|---------|----------|
| SUNDAY        | MONDAY                                                                                                                                                                                | TUESDAY                                                                                                                                                                                                                                                                                   | WEDNESDAY | THURSDAY | FRIDAY  | SATURDAY |
|               |                                                                                                                                                                                       | 1<br>• cas.ohio.gov article                                                                                                                                                                                                                                                               | 2         | 3        | 4<br>→  | 5        |
| 6             | 7<br>• HCM Weekly article<br>• das.ohio.gov article<br><i>cont.</i>                                                                                                                   | 8<br>• HR User Group meeting                                                                                                                                                                                                                                                              | 9         | 10       | 11<br>→ | 12       |
| 13            | 14<br>• <b>Self Service posters</b><br>• HCM Weekly article<br><i>cont.</i>                                                                                                           | 15                                                                                                                                                                                                                                                                                        | 16        | 17       | 18<br>→ | 19       |
| 20            | 21<br>• <b>Self Service posters</b><br><i>cont.</i>                                                                                                                                   | 22<br>• <b>Launch email</b><br>• OCSEA mailer<br>• OCSEA & 1199 SEIU website article<br>• das.ohio.gov article<br>• HCM Weekly article                                                                                                                                                    | 23        | 24       | 25<br>→ | 26       |
| 27            | 28<br>• <b>Self Service feature of the week email</b><br>• OCSEA & 1199 SEIU website article <i>cont.</i><br>• das.ohio.gov article <i>cont.</i><br>• HCM Weekly article <i>cont.</i> | <h2>March and April</h2> <ul style="list-style-type: none"> <li>• Self Service feature of the week emails will continue through March</li> <li>• Pathways article/postcard for March and April will contain Self Service reminder</li> </ul> <p>● = help needed from HR to distribute</p> |           |          |         |          |

FOR  
**DR**  
PURPOSES ONLY

# Employee Training Resources



1. Materials will be provided to agencies who wish to host Self Service Overview sessions for employees – **available mid February**
2. “How To” Job Aids will be available through [myOhio.gov](http://myOhio.gov) – **available at Go Live**

• Self Service Support •

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**Welcome to Self Service!**

Employee Self Service is your personal guide to your personal information. Self Service allows you to manage your personal information without the need for emails and phone calls to Human Resources or Payroll.

**Accessing Self Service**

**First Time User**([link to HCMJA001](#)): After receipt of the OAKS: ePay User Information email, please contact the Help Desk by phone at 614-644-6625 or 1-888-OhioOAKS (1-888-644-6625). The helpdesk staff will authenticate your information by the first and last name, employee id, [birth date](#) and last four digits of your social security number. In compliance with State of Ohio IT Policy No. ITP-B-3, the Help Desk will then assist you in creating a new password during your initial sign-on.

**Existing User:** Go to [myOhio.gov](http://myOhio.gov) to access Employee Self Service. NOTE: Your password will automatically expire after 90 days. You must then reset your Password to a new one not used before.

**My System Profile**

Your System Profile is where you can set up your personal preferences, such as change a password, change or set up forgotten password help, or add/edit email addresses.

- Password reset ([link to HCMJA002](#))
- Setup forgotten password help ([link to HCMJA003](#))
- Adding/Editing email addresses([link to HCMJA005](#))

**Self Service**

**ePay**

- View your online paycheck at [myOhio.gov](http://myOhio.gov)
- Read a brief guide to signing in and a comparison to your old online statement: [PDF](#)

**eBenefits**

- [Agency Proof Review Process in OAKS](#)
- [eBenefits: Viewing your Benefits Summary](#)
- [eBenefits: Life Events: Birth and Adoption](#)

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