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Overview
This document navigates you through the various pieces of employee self service using the native PeopleSoft production HR/Student environment (HEBPRD). This method of using self service is recommended for users who are in the HEBPRD database on a regular basis. Another business process guide is available to navigate you through these pieces in the MyCSUEB portal environment.
Notice about the new version of PeopleSoft
All page shots used in this guide are from the previous version of PeopleSoft (HCM 8.9). Please be advised that from the fourth week of February 2012, we are using the new version of PeopleSoft (HCM 9.0) and you may experience a difference in the way the new pages look and feel.

In the new version of PeopleSoft (HCM 9.0), the format of how the Main Menu expands has changed, but the actual navigation path and functionality has not changed. See the sample page shot.

Other minor changes include the following:

- Improved color scheme
- New look for Processing and Save indicators
- Pop-up Search Window and Edit Boxes
- Number of Search Results Option
- Type Ahead Matching
Log into PeopleSoft HEBPRD (PeopleSoft HR/Student Production)

Navigate to CSU East Bay Staff page.

1. Enter the URL in your browser: [http://www.csueastbay.edu/staff](http://www.csueastbay.edu/staff)
2. Hit enter or click the appropriate navigational button in your browser

The CSU East Bay staff website displays.

3. Click the drop down arrow in the Staff Applications & Tools box
4. Click PeopleSoft HR/Student

The PeopleSoft login page displays.

5. Enter your User ID (NetID) and Password
6. Click the Sign In button

You are now logged into PeopleSoft.

Depending on your role on campus and the access you have, you may see many more items in your left hand menu.
View the Personal Information Summary

Navigate to your Personal Information Summary

1. Click the Self Service menu item to open the full Self Service page
2. Click the Personal information Summary hyperlink

The Personal Information page displays.

From the page you can view your Name, change your Address, Email, Phone and Emergency Contacts and also view your Marital Status, Gender and Date of Birth.

Use the scroll bar to see additional information on this page.
Now let’s look at each section individually.
Review Your Name

Navigate to the Name section at the top of the summary page.

At this time, only the primary (or legal) name is displayed. You must visit the Payroll Office and provide appropriate documentation to change your primary name.

<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carrie Medders</td>
</tr>
</tbody>
</table>

To change your primary name, please visit the Payroll Office and provide the appropriate documentation to make the change. At this time, preferred names are not tracked in PeopleSoft.
Update Your Address

Navigate to the Address section near the top of the summary page.

Only the Home and Mailing addresses can be added/updated.

Please note that the Home address is used for the mailing of your W2 information.

1. Click the Change home/mailing addresses button

The Addresses page displays.

2. Click the edit button next to an existing address to make a change; click the Add a New Address button to add a new address

Please note, only the Home and Mail address are available for add/update.

The example in this guide shows you how to edit an existing email address.
The Edit Address page displays.

3. Update the address fields as appropriate
4. Click OK when all data is updated

Please follow the standard address rules shown on the page and enter your address in Mixed Case.

The Change Address page displays.

7. Indicate the date the change takes effect.
8. Click Save.

Please note that whichever type of address you selected is checked and grayed out in the Address Types box. If you were entering a new address, you would select the appropriate type.

The Save Confirmation page appears indicating the save was successful.

9. Click OK.
The Addresses page is displayed with the updated information.

When you return to the Personal Information Summary, the data is updated and indicates the date the update was made.
Update Your Phone Number

Navigate to the Phone Numbers section of the summary page.

1. Click the Change phone numbers button

The Phone Numbers page displays.

2. Click the Add a Phone Number button to add a new number

A new row is inserted.

3. Click the drop down arrow on the Phone Type box
4. Select the type of phone you wish to add

5. Enter the Telephone and Ext (if applicable)
6. Indicate which phone number is Preferred (only one can be preferred)
7. Click Save

You may only have one of each Phone Type and must always select one as preferred.
The Save Confirmation page displays indicating the save was successful.

8. Click OK

The Phone Numbers page displays.

When you return to the Personal Information Summary, both numbers are listed.
Delete a Phone Number

Navigate to the Phone Numbers section of the summary page.

1. Click the Change phone numbers button

The Phone Numbers page displays.

2. Click the delete button next to the phone number you wish to remove

The Delete Confirmation page displays.

3. Click Yes to delete the phone number (Click No if you do not wish to delete the number)

The Phone Numbers page is displayed.

4. Click Save
Update Your Emergency Contacts

Navigate to the Emergency Contacts section of the summary page.

1. Click the Change emergency contacts button

The Emergency Contacts page displays.

2. Click the edit button next to the contact you wish to update

The Emergency Contact Detail page displays.

3. Make the appropriate update; in this example, we are adding a phone number
4. Click Save when all updates are made
The Save Confirmation page displays indicating that your save was successful.

5. Click OK
Add an Emergency Contact

Navigate to the Emergency Contacts section of the summary page.

1. Click the Change emergency contacts button.

The Emergency Contacts page displays.

2. Click the Add an Emergency Contact button.

The Emergency Contact Detail page displays.

3. Enter the appropriate information for the contact you are adding.

Please note: if the contact has the same address and/or phone as you, check the box and the data will populate accordingly.
4. Click Save when all data has been entered.

The Save Confirmation page displays indicating the save was successful.

5. Click OK

The Emergency Contacts page displays, showing all contacts you have entered.
Make another Emergency Contact the Primary Contact

Navigate to the Emergency Contacts page.
1. Click the Change the Primary Contact button

The Change Primary Contact page displays.
2. Click the drop down arrow on the Primary Contact box
3. Select the contact you wish to make primary
4. Click Save

The Save Confirmation page displays indicating the save was successful.
5. Click OK
The Emergency Contacts page displays indicating the new Primary Contact.
View/Add an Email Address

Navigate to the Email Addresses section of the summary page.

1. Click the Change email addresses button

The Email Addresses page displays.

Your CSU East Bay email address is pushed into the system nightly and is marked as preferred. Another email cannot be marked as preferred.

You may delete the email address, but it will reappear the next day after the process is run.

You are not required to add another email address, but you may do so if you’d like.

2. Click the Add an Email Address button

3. Click the drop down arrow on the Email Type box

4. Select the type of email you wish to add
5. Enter the Email Address
6. Click Save

The Save Confirmation page displays.

7. Click OK

The Email Addresses page displays showing all email addresses you entered.

When you return to the Personal Information Summary, both addresses are displayed.
Delete an Email Address

Navigate to the Email Addresses section of the summary page.

1. Click the Change email addresses button

The Email Addresses page displays.

2. Click the delete button next to the email address you wish to remove

The Delete Confirmation page displays.

3. Click Yes to delete the email address (Click No if you do not wish to delete the email address)

The Email Addresses page displays with only the addresses you did not delete.

4. Click Save
Review Your Marital Status, Gender and Date of Birth

Navigate to the bottom of the summary page.

Information related to your Marital Status, Gender and Date of Birth can only be updated by Payroll. Please review your information and contact Payroll if a change needs to be made.

<table>
<thead>
<tr>
<th>Marital Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marital Status: Unknown</td>
</tr>
</tbody>
</table>

To change your marital status, please visit the Payroll Office and provide the appropriate documentation to make the change.

<table>
<thead>
<tr>
<th>Employee Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender: Female</td>
</tr>
<tr>
<td>Date of Birth: 02/04/1968</td>
</tr>
</tbody>
</table>

Contact the Payroll Office if any of your Employee Information is incorrect.
Review Your Benefits

Navigate to the Benefits Summary.

1. Click Self Service
2. Click Benefits
3. Click Benefits Summary

The Benefits Summary page displays.

This page lists all current benefits you are enrolled in. You may view your benefits for another time period by changing the date and clicking the Go button. You may go back as far as July, 2001.

4. Click the hyperlinked name of the benefit you wish to review (for this guide, we will look at Medical)

Please note that there is no additional data to view for Flexible Spending plans. The CSU only tracks the annual pledge amount for this benefit.
The Medical summary page displays.

This page shows your current coverage for the benefit you selected. You will see your plan name and provider, the type of coverage you have and any dependents you have covered.

5. Click the hyperlinked name of the Plan Provider to open a separate window and view their site
6. Click the hyperlinked name of a dependent you wish to review

The Dependent/Beneficiary Personal Information page displays.

7. Use your scroll bar to view all information on the page
8. Click the Return to View Health Care plan hyperlink
The Medical plan summary page displays.

9. Click the Return to Employee Benefit Summary hyperlink

The Benefits Summary page displays.
Review Your Dependent Information

Navigate to Dependent/Beneficiary Coverage.

1. Click Dependents and Beneficiaries
2. Click Dependents and Beneficiaries

The Dependent and Beneficiary Coverage summary page displays.

3. Click the hyperlinked name of a dependent if you wish to review their personal data
Review Your Job & Compensation History

Navigate to Job & Compensation History.

1. Click Payroll and Compensation
2. Click Job & Compensation History

The Job & Compensation History page displays.

This page shows the majority of your job-related changes at CSU East Bay. Most of the data is related to a change in compensation; however, you may see some transactions listed that were not compensation related.

3. Click the hyperlinked date of a transaction to see more information
The Salary Change Details page is displayed.

This page shows you more detail about a specific salary change. It also shows you your Salary Plan, Grade and Step (if you have one)

4. Click the Return to Job & Compensation History hyperlink
Review Your Paycheck Information

Navigate to View Paycheck.

1. Click Payroll and Compensation
2. Click View Paycheck

The View Paycheck page displays.

This page displays most of the information you see on your hard copy paystub. Not all pay information is stored in PeopleSoft, so some items you see on your paystub will not be shown here. A few of these are:

- W2 information
- Tax descriptions
- Leave balances

3. Use your scroll bar to view the rest of the information

View Paycheck

Please note that this paycheck view is not intended to replace your actual paystub. Some data that appears on your paystub is not stored in PeopleSoft and is therefore not visible in this summary (eg: W2 information, tax descriptions). If you have questions about your paystub, please contact the Payroll Office.

Carrine Medearis

Company: $1,323.70
Cal State East Bay
Pay Begin Date: 01/09/2009
Address: 25000 Carlos Bee Boulevard
Pay End Date: 02/28/2009
Hayward, CA 94544
Check Date: 03/01/2009

Review the details of your paycheck. To view other checks, select "View a Different Paycheck".

General

<table>
<thead>
<tr>
<th>Name:</th>
<th>Business Unit:</th>
<th>Email:</th>
<th>Pay Group:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>HY001</td>
<td></td>
<td>Payroll</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>14400 - Administrative Applica</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Hayward Campus</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Admin Analyst(entry)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Monthly</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Pay Rate: $4,425.00</td>
</tr>
</tbody>
</table>

Paycheck Summary

<table>
<thead>
<tr>
<th>Gross Earnings</th>
<th>Fed. Taxable Gross Total Taxes Total Deductions Net Pay</th>
</tr>
</thead>
<tbody>
<tr>
<td>4,425.00</td>
<td>4,158.83</td>
</tr>
</tbody>
</table>

Earnings

<table>
<thead>
<tr>
<th>Description</th>
<th>Hours</th>
<th>Rate</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular</td>
<td></td>
<td>4,425.00</td>
<td>32995</td>
</tr>
</tbody>
</table>

Tax

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
4. Click the View a Different Paycheck hyperlink

The View Paycheck search page displays.

From this page, you can look at any check you have received since PeopleSoft went live (July, 2001).

5. Click the hyperlinked date of the check you wish to review
Whom to Contact for Help?
For additional help or to report problems with this functionality, please log a ticket via the Service Desk (http://www.csueastbay.edu/servicedesk).