L200PD001 - Personal Data-20241024_172915-Meeting Recording

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CC **Catania, Cheryl** 0:05

So good afternoon everyone.
My name is Cheryl Catania and I am the manager of the HR and time and Labor modules, of course.
Ctd core CT.
And today, we're going to be going over the changes that are occurring with personal data.
Some guidelines for today's class will be covering the enhancements to PeopleSoft and how they will affect personal data processes, and you will refer to this class since you have the HR specialist role, this means that you have the ability to create employees, add jobs as well as Ed.
Personal data, please feel free to ask questions and remain engaged while I provide an overview of the system changes.
We do realize that some agencies are having.
Issues with typing their questions into the chat, so if you're not able to type your question into the chat, you can always do it through teams to Rose Jensen.
She'll throw her name in the chat right now so that you know how to spell it, and she will transfer those over to the to the session.
Useful information.
There's some extra things that we're starting with this class today.
We now have the capability for accessibility if you need it on the webinar, this is to be turned on on an individual basis and also to mention that our core CT training page is now available and it's been updated. The link for this will be available at the.
End of the course.
Here's a brief overview of the roles throughout the training. As the trainer, I'll be covering the course content, including discussing the new functionality and also the answering questions and maintaining a parking lot if needed for future follow up. We do have a separate facilitator and she'll be sharing.

The presentation and managing the time. She'll also direct questions from participants at the end of each section, and will also share a survey when the course has been completed.
As a participants, please ask questions in the chat. As I mentioned earlier, if you're not able to put your question directly into the chat, please send it to Rose Jensen via teams.
And she'll put them into the chat so we can answer them during the meeting.
During the presentation, your camera and microphone will both be turned off, so you won't have the ability to turn them on.
At the end of this course, you should be able to navigate the fluid tiles to add new employees.
You should be able to update and maintain existing employee data and create new organizational relationships.
Some key terminology that is used throughout the different trainings which you may be familiar with as this is the same terminology we presented for each course.
The Fluid user interface.
It's a new interface that adapts to different types of devices.
Smartphones, tablets, desktops to make it easier to use across multiple multiple types of devices.
Home pages.
These also are referred to as dashboards at times.
These are a collection of tiles that users can Click to access transactions.
And they serve as a personalized entry point for different types of tasks and activities.
Process this is a series of actions or steps that users complete within a specific business process.
We also call this an activity guide an essentially essentially an activity guide helps to streamline complex tasks by breaking them down into manageable steps.
And lastly, we have tiles.
These are shortcut buttons that help you quickly get to important tasks or information without searching through the menu.
Agenda.
Is going to be about 45 minutes to to an hour depending on the number of questions that come up during the training and we'll be covering changes to personal data, how to create an employee, how to create a person of interest.
Add an additional job as well as review and answer questions.

The next few slides will be an overview of the changes to personal data.
We'll discuss the new fluid tiles and how they are broken out into different topics.
We'll review the differences between the current and the new process of adding personal data.
We'll be running through scenarios to directly show how a user would go about adding and updating employee information.
Navigate to the new homepage.
You will start the core C T H RMS homepage.
Click on the workforce administrator tile and from there you will click on the manage human resource tile.
This leads us to the section where we will view manage human resources homepage.
Here's a screenshot that compares the difference in navigation between the current system and the new fluid tiles.
In the current system, navigating to add a person, modify a person, and add concurrent employment involve multiple steps, and they're on different menu paths, and the upgraded system. All tiles related to an employee's personal and job information will be located on one home page. There's a separ.
Tile for each process, making it easier to start the appropriate process.
The new pathway again is the core C, T H RMS, workforce administrator and management resources.
There's a screenshot of how the new tiles appear once you are on the management resources homepage for this training.
We'll be reviewing the modify person, create employee, create person of interest and organizational relationship tiles.
There may be additional tiles on the screen on a screenshot that's on this presentation that will not be available to you when the upgrade goes live.
Those tiles appear based on your security, which will not be changing.
As you can see, the screenshot also includes the managed job tile, which was covered in the managed job course.
You can see that all the tiles related to the employees job and personal information are now located on this one home page.
Included a slide with definitions as the tile names have changed.
And I'm sorry and some of the items through the current menu path.
So create an employee the create an employee tile allows you to add an employee and link them to the job you will be performing.

This is the equivalent to add a person in the current system.
Modified percentile allows you to edit personal details of an existing employee.
Create person of interest. Tile allows you to create a person of interest and assign them to a job.
We'll be looking at this tile very briefly.
The majority of users do not process persons of interest and will not have security access to it.
The organizational relationship tile allows you to add a job to a previously created person or add an additional job to an employee that already has one.
This is the equivalent to add employment instance in the current system.
And here is a side by side look at personal data. Currently when you open modify a person, the different pages are located on tabs set up horizontally across the top of the page.
In the new fluid system, once you open the tile for modify a person, the tabs are now located vertically on the left hand side. The business process for updating personal data itself is not changing.
The same information is in the new fluid pages.
But there are small changes to the tabs which will review when we walk through hiring an employee.
Another change I wanted to point out is the search page.
Here's an example of the search page as it appears today.
Modify a person.
The most common search fields used are employee ID and name above the specific field section is a drop down for recent searches. This will display the last five employees you entered criteria for, and there's also an additional section to the right where you can save specific search CR.
In the upgraded system, the view of the search page is slightly different, but contains the same fields such as employee ID and name.
Saved searches is still at the top of the page and functions the same as it does today.
The recent searches is no longer a drop down at the top of the page when you first open it. The last five employees that you search for will automatically appear at.
The bottom of the screen.
This allows for easy retrieval of an employee you have recently visited.
There's a comparison of the page layout for creating a new employee. The left side contains the current page that opens when you're hiring an employee through out of

person, as in modify a person.
The different pages are located in tabs placed horizontally across the top.
And the upgraded system, when you first click the create an employee tile you'll you'll receive a screen that has a grayed out box for the employee ID.
The employee ID will be auto generated just as it is today when the hire is completed.
Upon clicking continue, the personal data opens and you will notice that the tabs are now located vertically along the left hand side, the same as in modify a person.
One key difference is the organizational relationship tab, which is currently the last tab while processing a new hire.
This is now a separate tab.
It will be will be reviewing it later in the presentation.
Now we'll go over creating an employee which is currently called at person.
Well, in the creating an employee page, you'll notice that the process is handled in steps listed on the top of the page.
First, the personal information will be entered, followed by job. Once all the information has been entered, you'll be able to save the transaction. The tab for each section is located on the left for easy access to specific pages.
As I mentioned, the tabs are slightly different.
The Personal data section allows a user to edit personal details such as name, date of birth, biographical details and national ID. This is the biographical details page today.
The contact information section allows a user to edit addresses, phone numbers and emails.
The Regional Information section allows the user to edit the ethnic group.
War service.
That's a new tab.
This section allows a user to edit military status. The effective date of the change and the start and end date of service and another new tab is the validation tab.
This is where you will check for errors prior to moving on to job.
We're gonna take a closer look at each tab.
The first tab is the personal details section which contains fields like the name, date of birth, gender, marital status and national ID. As you can see in the screenshot then the fields for name are all visible on the on the main page and you no longer need to.
Click a link to enter it.

Both the biographical details and national idea are available by clicking on the blue box for each section.
Both of these will appear in a pop up window to populate once you've entered information in these fields.
The blue box will no longer display and the data will be visible on the screen.
The same edits that exist today will continue. For example, if you enter a Social Security number that is assigned to an existing employee, you will receive the same warning message that the social is already in use and the message will contain the employee ID to assign to.
Contact Information section allows a user to edit addresses, phone numbers and emails. When you're adding an address for the first time, you'll click on the arrow button on the right to open the address detail page.
Updating or adding a new type of address is slightly different today. When you click on the blue link to add address details located on the right of the specific address type, it's only for that specific type of address.
Fluid pages. You will select the plus button above the address.
Type A pop up window will appear and from there you can select any address type and update an existing address types information.
As with the previous tab, once you've entered information for address, phone, or e-mail, the information will appear on the page.
Regional Information section allows a user to add ethnic groups the same as today.
War Service section allows a user to edit military status.
The effective date of the change and the start and end dates of service. This field was created to hold military service dates that may be used for longevity.
It's an informational only field and does not contain any rules.
Before I move on to the to the next tab, I just wanted to point out that there are two tabs highlighted on the left and you can see the fields for both war service and validation. While in the personal data pages, all of the information is actually LOC.
On one page, in addition to using the left hand tabs to move through the sections, you can also use the scroll bar on the right to scroll through the entire page.
Would you have completed entering the personal information?
There is a validation when you click the next button to move to job, the validation process will first run and show any warnings or errors.
This will ensure that all necessary information in all of the fields have been completed for a person prior to moving to job.

The validation replaces the pop up box that appears in the current system.
In this screenshot we have an error that the name is required and the message that the validation has failed.
There are two types of validation messages.
There are errors and warnings on the previous slide. We saw an error which will need to be resolved before advancing to the next page.
Here we see a warning which is an alert to tell you that information may be missing.
However, with warnings you can check the box that's labeled.
Proceed with warning and you can move forward without updating the information if it is correct.
Once you've checked the box that states proceed with warnings, you'll click the next button.
A message briefly appears indicating the personal details were successfully submitted.
The system will bring you to job data to complete the hire process.
Notice that the step on the top has been updated to job data and an employee ID has been created and it's displayed on the top left side of the screen.
We're not going to be covering the job data pages here as they were covered in the managed job prerequisite course.
With that said, there are two differences that I would like to point out. While you create an employee, you do have the ability to update the effective date and the action reason directly on the page.
Which is different from when you are adding a new road to an existing employee.
The other change is the location of the notepad.
Notepad is no longer located in job, so once you save the hire, you will need to navigate to the job action Summary page to enter the notes.
Once you've completed the job information and save the transaction, a confirmation page will display with the save successful.
From this page, users will be able to easily continue to some additional pages that are normally completed along with the hire.
This includes such pages as time reporter data and emergency contacts.
OK, I can take a quick pause here in case there were any questions on hiring an employee.

Reutter, Shanon M 18:15

There are none, none at this time.

Jensen, Rosemarie 18:20

I don't any either.

Catania, Cheryl 18:21

OK.

Thank you.

OK, so I will move on with the presentation since there's no questions. As I mentioned earlier, the majority of you do not use a personal person of interest type. You will only have access to this tile if you use this process today. For those who do use it, I wanted to point out one difference between creating an employee and creating a person of interest.

When starting to create a person of interest, you will now be required to select the person of interest type before continuing on to create the employee ID.

The rest of the higher process is the same as the example we just walked through.

As with that higher, there are multiple steps in the process.

The transaction starts with entering the personal data, followed by entering job.

Once all the information has been entered and saved, you will receive a confirmation that your person of interest has been completed.

Now I'm going to talk about ad organizational relationship.

This is used to add an additional record to an existing employee, such as dual employment, and it's also used to search for an employee where the personal information has been entered and saved, but the job data had not been completed.

Here's a screenshot of today's menu path for add employment instance in the upgraded environment.

This is now located in the ad organizational relationship tile.

The organizational relationship tile is located on the manage Human Resources homepage. After entering the search criteria, all existing employee records will appear.

You'll notice on the screen that you're now able to view more information regarding the employee prior to continuing on in the process.

A nice feature that's new is that you can now see the active or inactive status right

from this page, and you don't need to open each record individually to get this information.
Did you add a new record?
Click the add organizational relationship located on the right of the screen.
Is a screen shot of how the page looks after you have clicked the ad organizational relationship.
A screen will appear where you must select the type of employment the same way you do today on the organizational relationship tab in personal data when you're hiring.
Most of you only see the option for employee based on your security access and that will be your only option here as well.
The system will assign the next sequential record number based on the employees existing records.
Since you are creating a new record number, the action will default to higher and you will need to enter the correct effective date and reason prior to preceding.
And adding an organizational relationship, there are two steps versus the three for create an employee. Since the employee already exists, personal data does not need to be completed and a transaction starts in job.
Something I did want to point out, we have seen what the new record number will be in the previous slide.
It's not visible on the job pages when completing the transaction.
I'm saving the transaction.
You'll receive a confirmation which will also include the new record number.
The same links appear as when hiring a new employee for easy access to pages that you may need to update, such as time report or data. If no additional pages need to be updated, you can click on the go to manage human resources and it will return you.
To the manage human resources home page.
So in summary, the topics that we have covered and that you should have learned was to navigate and access the fluid pages and tiles, administer HR processes such as creating an employee, a person of interest and adding an organizational relationship and understand the changes from the current form.
To the new update.
That concludes the presentation portion of personal data covering the changes that are happening. Are there any questions at this point?

Reutter, Shanon M 23:15

There is one, it says.

Is there a tab for recording physical disability?

Catania, Cheryl 23:23

There is a disability section in core.

It's in core today and the placement of that is not changing, so it's still going to be through the navigational menu path on the top right and the disability page will still be located in the same area.

Reutter, Shanon M 23:44

Have for questions.

Jensen, Rosemarie 23:51

That's it for me as well.

Catania, Cheryl 23:58

If you do come up with a question after this presentation has completed, you can always send an e-mail to the readiness at ct.gov.

E-mail and they will take the questions and include them into the question and answer.

Follow up that will be posted on the web.

You can also enter a footprints ticket with any of your questions and that will then be routed to the appropriate team and we'll be able to answer any questions that come in at that point.

Reutter, Shanon M 24:27

I do have one more question.

Are are, are there going to be slides to follow later on?

Catania, Cheryl 24:36

This presentation if, if I'm understanding the question, this presentation will be put out on the website.

And you will be able to access it from there.

Reutter, Shanon M 24:49
And then another question.

Catania, Cheryl 24:50
Play that's.

Reutter, Shanon M 24:51
Can we get an example of when you would use the person of interest?

Catania, Cheryl 24:57
Sure. Like I mentioned, most of you will not use person of interest. The main time that person of interest is used is by the Retirement Division.
So if an employee is retired, they are created under a person of interest.
So they're the ones that really use that feature.

Reutter, Shanon M 25:16
That's all the questions.

Catania, Cheryl 25:23
OK.
That completes the personal data course.
Looks like Shannon already put the link in for the survey, so if you could please go in and fill out the evaluation for the course. And there's also training material that has got a location on the modernization tab on the course ET website. There's a link here for.
And also there's more information for job aids. The e-learning classes. All of that can be found on the course CT website under the modernization link. So hopefully you'll be able to get information that you need to be prepared for the upgrade from that website.
I think that will conclude our session today, so please feel free to send questions along through footprints or readiness@ct.gov. Thank you.

Reutter, Shanon M stopped transcription