

PeopleSoft 9.2 HCM Bootcamp

Core HR, NA Payroll and Benefits

Developed for HR, Benefits, Payroll administrative professionals, this training course covers the fundamental concepts of using the PeopleSoft HRMS system for employee data entry, maintenance, processing and reporting functions. Learning from experienced practitioners and by performing hands-on training exercises, trainees will gain proficiency to use the system effectively for their day-to-day tasks.

Prerequisites:

- Basic Computer Literature

Navigating PeopleSoft

- Login and User Security
- Homepage, Search and Menu Navigations
- User Personalization Options
- Self-Service vs Administrator Pages

HRMS Basics

- Person Model Overview
- Effective Date Basics
- Parent/Child Page Structure
- Business Unit, SETID and Table set Sharing
- Department/Row level security

Maintain Personal Data

- Personal Data Fundamentals
- Add a Person
- Modify a Person
- Personal Data Tables for Reporting

Maintain Job Data

- Job Data Fundamentals
- Add a new Job
- Modify existing job
- Maintain Employment Dates
- Maintain Compensation
- Job Data Tables for Reporting

Employee Data Extended

- Maintain Emergency Contacts
- Maintain Identification Data
- Maintain Disability Data
- Maintain I9 Data
- Maintain Badge, Security Clearance

Payroll Data Overview

- Review Employee Tax Data
- Review Employee Bank Accounts
- Review Paycheck
- Payroll Tables for Reporting

Benefits Data Overview

- Review Dependent/Beneficiary Data
- Review Benefit Summary
- Review Benefit Enrollments
- Benefits Tables for Reporting

Self-Service Basics

- Employee Self-Service Overview
- Manager Self-Service Overview

PeopleSoft Query Reporting

- Query Manager Overview
- Create Simple Query
- Query Output and Scheduling

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- Add/Modify a Person

Maintain Job Data

- Job Data Fundamentals
- Add/Modify Job Data
- Maintain Payroll Data on Job

Benefits Data Overview

- Review Dependent/Beneficiary Data
- Review Benefit Summary & Enrollments

Payroll Data Overview

- Review Employee Tax Data
- Review Employee Bank Accounts

Payroll Fundamentals

- Earning Codes
- Deductions
- Accumulators
- Garnishments
- Pay Groups

Payroll Processing

- Paysheets in Payroll for North America
- Pay Calendars, Pay Run IDs, Balance IDs
- Creating Paysheets
- Review/Update Paysheets and Paylines
- Payroll Calculations
- Review Paychecks
- Review Payroll Error Messages
- Finalize Payroll
- Generate Bank Files & Direct Deposit
- Generate Self-Service Paycheck
- Generate Accounting Lines for GL

Self-Service Basics

- Payroll Self-Service Overview

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Maintain Job Data

- Job Data Fundamentals
- Add/Modify Job Data
- Maintain Payroll Data on Job

Benefits Process Overview

- Base Benefits in PeopleSoft
- Benefits Process Phases
- Relationship btw Benefit and HR Data
- Dependent and Beneficiary Data
- Benefits Tables for Reporting

Enroll Employees in Benefits

- Assign Employees to Benefit Programs
- Enroll Employees in Benefit Plans
- View Employee Benefit Enrollments
- Override Deduction Information

Review Benefit Plans

- Health Plans
- Life Plans
- Disability Plans
- Savings Plans
- Spending Accounts

Calculate Deductions

- Deduction Calculation Process
- View Calculated Deductions Online

Benefits Administration

- Benefits Administration Fundamentals
- Benefits Program Table Overview
- Running Benefits Admin Process
- Review Benefits Admin Process Results
- On-Demand Event Maintenance
- Benefits Administration Records

Self-Service

- Benefits Self-Service Overview