Guide to PeopleSoft
Employee Self Service (ESS)

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Introduction to Employee Self Service

You can access the Pittsburgh Regional Transit's Employee Self Service portal from anywhere you have internet access. This could include:

- Your home
- A Pittsburgh Regional Transit worksite
- Your mobile internet-connected device

To access the Employee Self Service portal you will need your User ID and Password. If you are a first time user, you will need to set up your Employee Self Service Account. You should have received a Welcome Letter that included your User ID and a default password. If you did not receive a Welcome Letter, please contact the Help Line at 412-566-5333.

How to Access Employee Self Service

Using an internet browser (such as Edge or Chrome) from any internet-connected computer or using you mobile device (running iOS, etc.), go to the following address:

1. Go to: https://MyHr.portauthority.org

   Tip: Bookmark this link for future reference

2. From the login page, enter the User ID assigned to you.

3. Next, enter your password.

4. If you do not remember your User ID, you will need to contact the Pittsburgh Regional Transit Employee Self Service Help Line at (412) 566-5333.
   If you do not remember your system password, you can click on the Forgot your User ID/ Password? link on the login page and complete the steps to reset your password.
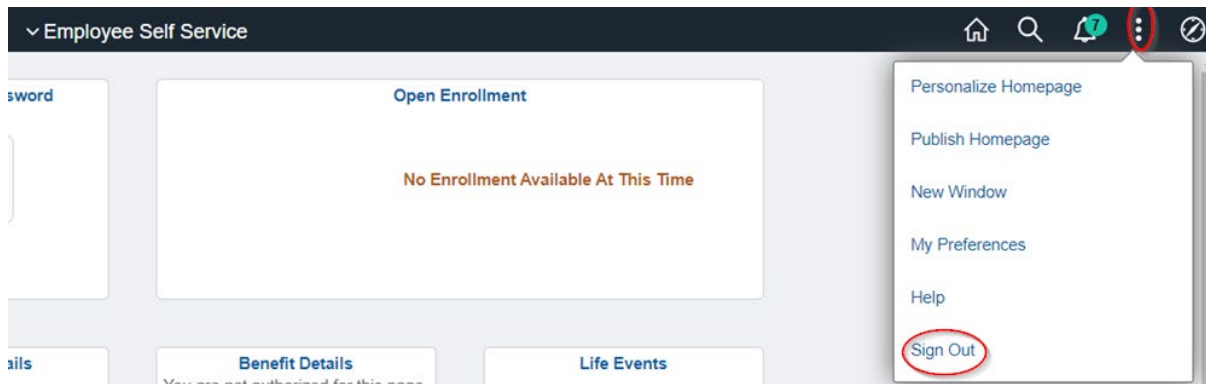
> *Tip: The first time you login you will need to setup security questions and answers and enter a personal email address. If you already have a PeopleSoft HR account, you will not need to setup a new account but should complete the security questions.*

ORACLE® PeopleSoft

User ID

XXXXXXXX

Password

••••••••••

Forgot your User ID/Password?

Select a Language

English

Sign In

☐ Enable Screen Reader Mode

Quick Guide to ESS (PDF)

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Site Availability

The site will generally be available 24 hours day, 7 days a week with certain down periods for routine maintenance. If the site is not available, you will encounter a message that reads, "Employee Self Service is not currently available."

It is very important that you sign out once you have completed your visit to the Employee Self Service portal. This will help prevent unauthorized access to your information. **Do not save your password on a public computer.**

Special Instructions for your Initial login to the System

The first time you login to PeopleSoft Employee Self Service, you will be prompted to reset your password AND setup security questions which will be used during authentication if you ever need to use the Forgotten Password link.

Here is the page that you will need to complete at your initial login:

Initial Login Procedures

User ID:	████████
Description:	██████
New Password:	
Confirm Password:	
Email ID:	

Questions and Answers, it will be used in "Forgot Password"

*Question 1:	▼
*Answer 1:	
*Question 2:	▼
*Answer 2:	
*Question 3:	▼
*Answer 3:	

Submit

To continue, please fill in all of the items presented. Once you are done, click the "Submit" button to save your inputs.

Navigating in Employee Self Service – Your Homepage

Once you login to the Employee Self Service portal, you will see your Employee Self Service Homepage.
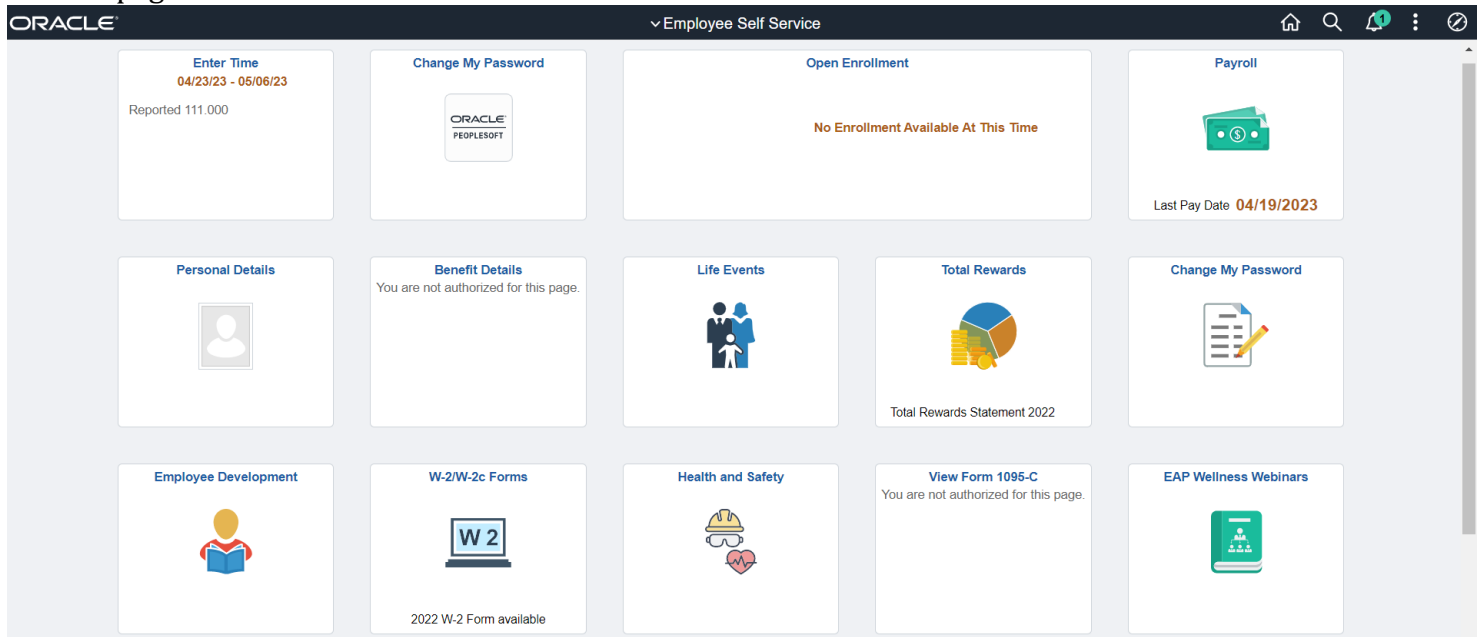
On your homepage, you will find the following navigation tiles. To open up a tile, just click anywhere on the square.

Enter Time - use this tile to enter your work hours if applicable.

Change My Password (Oracle) – from this tile, you can update your password.

Open Enrollment - using this tile, you can view and update benefits during the open enrollment period.

Payroll – from this tile, you can view your current and previous paychecks, update your tax withholding elections, and add or change your direct deposit.

Personal Details – using this tile, you can view and update selected personal information, such as address, phone number, emergency contact, etc.

Benefit Details – using this tile you can access your current benefit information, make updates to your beneficiaries, start a "Life Event", and other options.

Life Events – using this tile, you can start a "Life Event"

Total Rewards – from this tile, you can view your Total Compensation Statement.

Change My Password – from this tile, you can update your password and your security questions.

Employee Development – from this tile, you can view your required training and employee training history report.

W-2/W-2c Forms – from this tile, you can view your current W-2 Wage and Tax Statement and W-2c current W-2 Wage and Tax Correction Statement (if applicable)

Health and Safety - for HR use only

View Form 1095-C – from this tile, you can view the health insurance coverage offered to you by PRT

EAP Wellness Webinars – from this tile, you can view the webinars offered by the Employee Assistance Program

In addition to the tiles presented on the homepage, you will also see the following icons in the upper right corner of the page:

This is the Home icon. If you click this icon from any location within the system, you will be returned to your homepage.

This is the Action icon. The commands found on the menu presented by clicking this icon will depend on where you are within the system. Pay attention to this icon to get an understanding of the actions you can take on each page you visit!
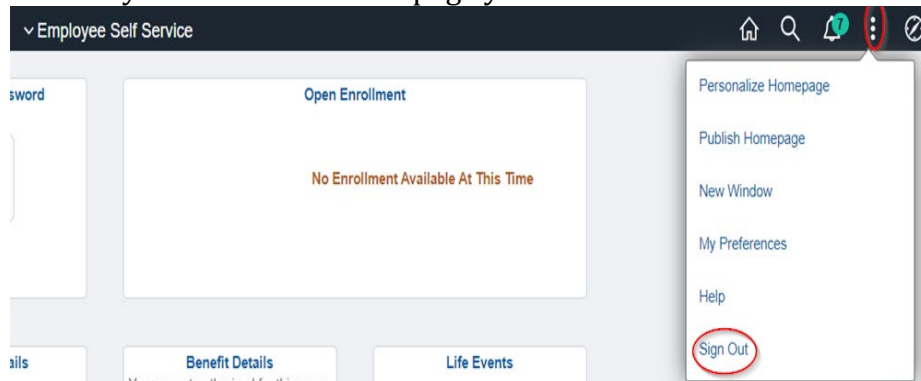
IMPORTANT: if you want to sign out of the system, click this icon from most any page and you will have the ability to sign out immediately.

How to View and Update your Personal Information

When you click the Personal Details tile, you will be presented with the following page:

From this page, you can choose the information you want to view and/or update from the list in the box on the left side of the page. In this list, you will find the following options:

Address – you can view and update your home and mailing addresses from this page.

Contact Details – where you can add or update your own contact information.

Ethnic Groups – you can view and update your Ethnicity. Port Authority is required by Federal law to assign an Ethnicity for all employees in order to comply with the Federal Reporting Guidelines.

Emergency Contacts – where you can add or update your Emergency Contact information.

Additional Information – from this page, you can view specific personal information about yourself. However, you are unable to make any changes to the information presented on this page. If any of this information is incorrect, please contact Human Resources directly.

Your Benefits Summary Page

When you click the Benefit Details tile, you will be presented with your current benefits enrollment information.

On your Benefits Summary page, you will see all of the Benefit Plans in which you are enrolled. To get more details about a plan, just click on the specific row to drill down to additional information regarding your enrollment.

Below is an example of what you will see when you drill down into the Medical Plan link. You will see your current enrollment and covered dependents as of the current date. There also is the ability to look at your enrollment information as of a different date.

Making Changes to your Benefits – Life Events

From your main Benefits Details page, you will see an option on the left-hand menu for **Life Events**.

By clicking on this menu item, you can initiate an Adoption, Birth, Marriage or Divorce event. You can then choose to initiate a Self-Service Life Event.

‹ Employee Self Service	Benefit Details
📰 Benefits Summary	
👥 **Life Events**	**Life Events**
👥 Dependent/Beneficiary Info	If the below link requests your username and password,
✅ Benefits Enrollment	please use your network credentials
📊 Benefit Statements	Click Here to View Life Event Employee Guide
🏛 Affordable Care Act ⌄	There are some events that involve you as the Employee or your family members.

Review the choices and select the appropriate Event. Then enter the date of your event.

Employee
- ○ I got married
- ● I had a baby
- ○ I adopted or gained legal custody/guardianship of a child
- ○ I got divorced/legally separated

*As Of [📅]

Start Life Event

Scroll Area

The Life Event must be completed within 31 days of your qualifying event or you will not be eligible to change your Benefit elections.

Let us look at a specific example for how to execute a Life event. In this example, we will review the steps you need to complete when you have a new baby!

The steps you need to complete online include:

- Entering your child's date of birth
- Attaching a proof of birth document (such as a birth certificate)
- Reviewing your current benefit elections and make any desired changes
- Review your current dependents or beneficiaries, and make the necessary changes
- You may want to change your direct deposit or tax withholding elections as well
- Complete your Enrollment changes and enrolling your new dependent
- Review of changes and final summary

Note: *The steps involved in completing each Life Event will vary depending on the event. For Example, a Marriage event does allow you to submit a Name Change request.*

Here is the page you will see when executing a Birth Event:
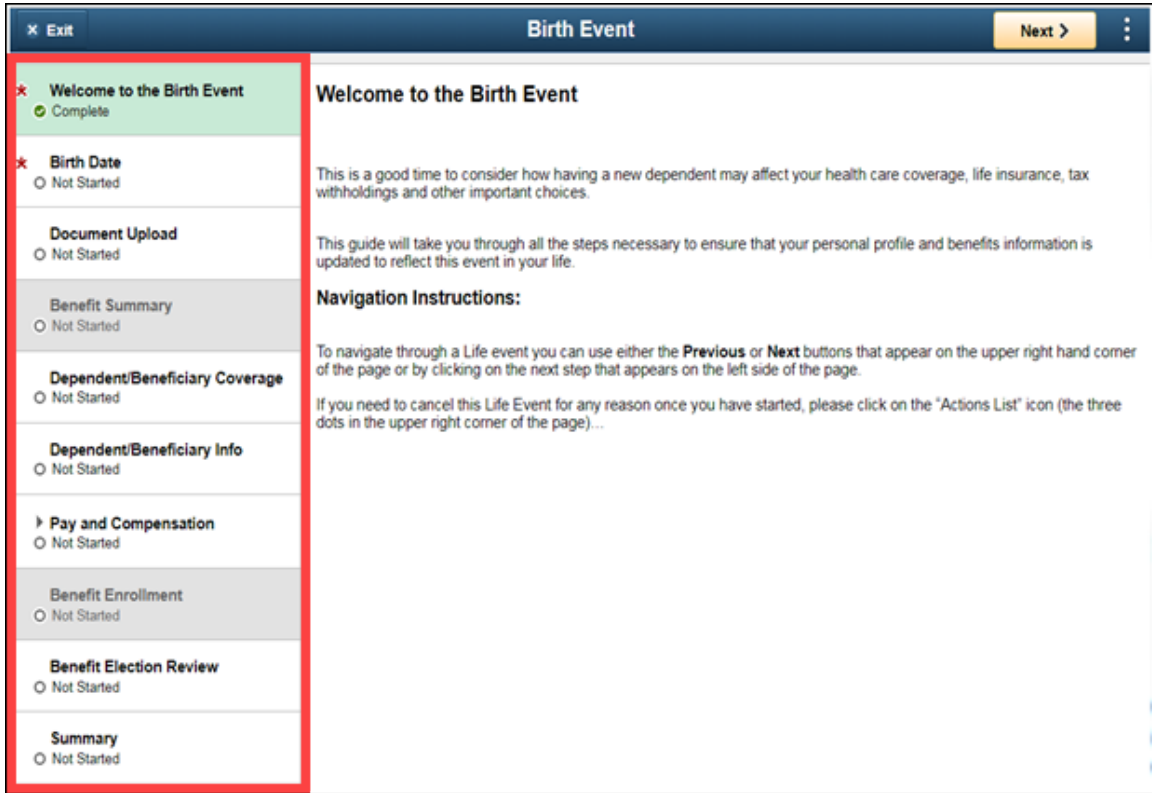
Canceling a Life Event

If you need to cancel a Life Event that you have started, you can do so by clicking the Activities List icon in the upper right corner of the page and selecting "Cancel".
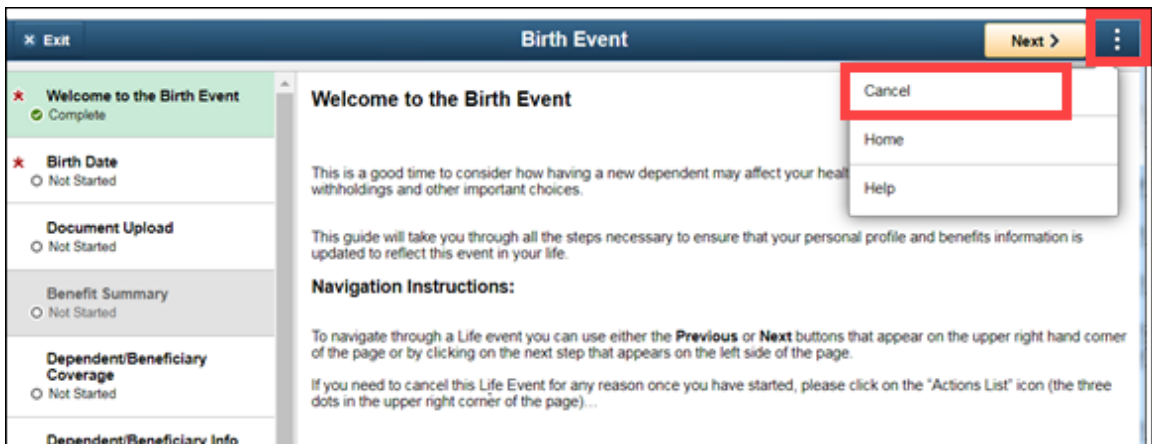
Additional Actions Available from Benefit Details page

From your main Benefits Details page, you will see additional options on the left-hand menu:

- Review and/or updating your current Dependent and Beneficiary information
- Complete your Benefits Enrollment
- Obtain your benefit details reported under the Affordable Care Act (this will be made available at some point in the future)

Dependent/Beneficiary Info

This next page lists all the Dependent/Beneficiaries in PeopleSoft and their relationship, their Dependent or Beneficiary status. The "**>**" symbol is again on the right side of the page to indicate that you can drill down to more details on your dependents and beneficiaries.

Benefits Enrollment

This link will be used to make self-service enrollment changes that are not initiated through a Life Event. Examples could include Open Enrollment, Hire or other Job changes that impact benefits eligibility. If no "Select" button appears, then the employee does not have an available event that allows for benefit changes.

Payroll Information Tile

When you click on the Payroll tile, you will be presented with the following options:

- **Paychecks** – select this option to see your current and previous paychecks
- **Tax Withholding** – select this option to update your current Federal tax withholding elections
- **View W-2/W-2C Forms** – select this item to view your historical W-2/W-2C forms that may be available
- **Direct Deposit** – select this item to add new or update your existing Direct Deposit instructions

Viewing your Paycheck online

Your available paychecks will appear in the right portion of the panel. Click on the desired paycheck and a new window will open, presenting the details of that paycheck. This will look like the paycheck/direct deposit advice you receive for each pay period. This can then be printed or saved.

Viewing your current Tax Withholding elections

To view or update your current Federal Income tax withholding elections, simply click on the box where your current withholding elections are presented.

The system will then present you with additional instructions. To make changes to your current elections, click on the box that contains the words "Federal Withholding Allowance Certificate":

You will then be presented with the following warning (to alert you that the system will be downloading a copy of your current tax form):

Click the "OK" button and you will be presented with an updated online form for you to use to make your changes:

Saving your changes to your Federal Withholding Elections

Once you have completed the form, click the green "SUBMIT" button to prompt the system to save your changes. In order to save your changes, and for added protection, the system will prompt your to re-enter your UserID and password (as shown in the following box).
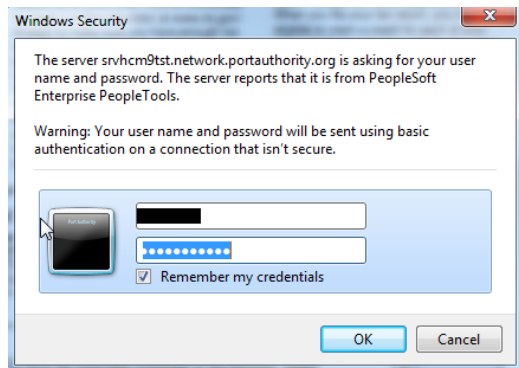
Uploading your W-4 form to PeopleSoft
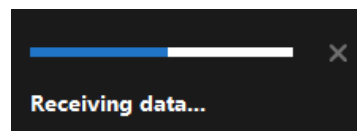
The changes you have made to your Employee Withholding Allowance Certificate have been successfully submitted on 2018-11-06. You can scroll to the next page to view your saved data or print/save a copy of this document for your records.

Please be advised when you close this document the original PDF document remains open for your reference. To exit the application process, you will need to close both the original and the updated PDF documents.

If you need to make additional changes, you must navigate back to the Tax Withholding Forms page and begin the process again.

Below this message will be your W-4 form with your new changes.

Be sure to close this window when you are finished!

Viewing your State Withholding Elections

There is no Pennsylvania State W-4 form, if you select this option, you will get the message below:

This is the message you will get if you select the Pennsylvania State Tax Withholding.
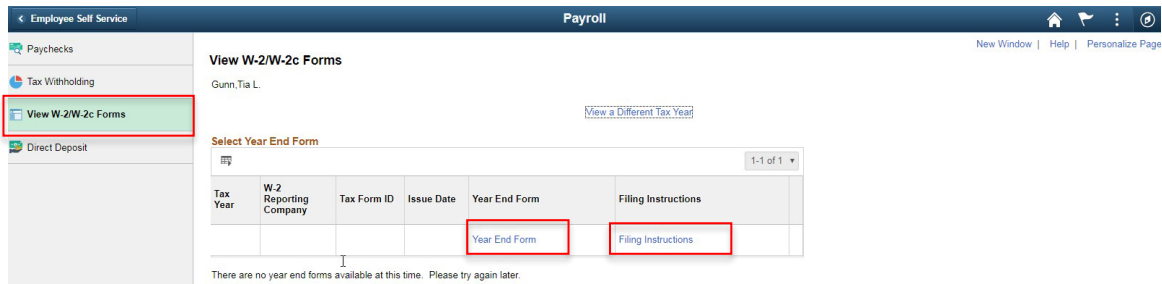
Viewing your W-2/W-2C Forms

View W-2/W-2c Forms – When the W-2s are ready for 2018, you can navigate here to view/download your forms. Click on the Year End Forms link and your W-2 will display as a PDF type file you can print or save.

The Filing Instructions will give you instructions on how to file.
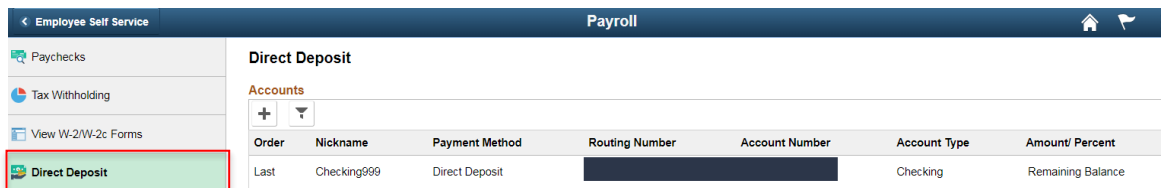
Viewing/Updating your Direct Deposit Instructions

When you select click on the left navigation panel for Direct Deposit, you will see your current account setup.

- The first account setup will be the primary account and must be setup as Remaining balance.
- The second account can be setup with a percentage or an amount.
- Only 2 accounts are allowed to setup at one time

Click the "+" sign to add a new account or click on the current account to make changes.

Here are the instructions for adding new deposit instructions:

1. Nickname – enter a name for the account you are setting up
2. Payment Method – Direct Deposit
3. Routing Number – This comes from your check or savings slip. See screenshot below to find the routing number. This routing number will be validated
4. Account Number - This comes from your check or savings slip. See screenshot below to find the routing number

Add Account

Cancel | Save

*Nickname
*Payment Method: Direct Deposit

Bank

Routing Number
Account Number
Retype Account Number

Pay Distribution

*Account Type
*Deposit Type
Amount or Percent
Deposit Order 1

Check Example

The Routing Number and Account Number can be obtained from your check.

In the check there are three groups of numbers. The first group contains the nine digit routing number, the second provides the account number, and the third is the check number.

9999

⑈999999999 ⑈999 999 999⑈ 9999

1   2

1 - Routing Number
2 - Account Number
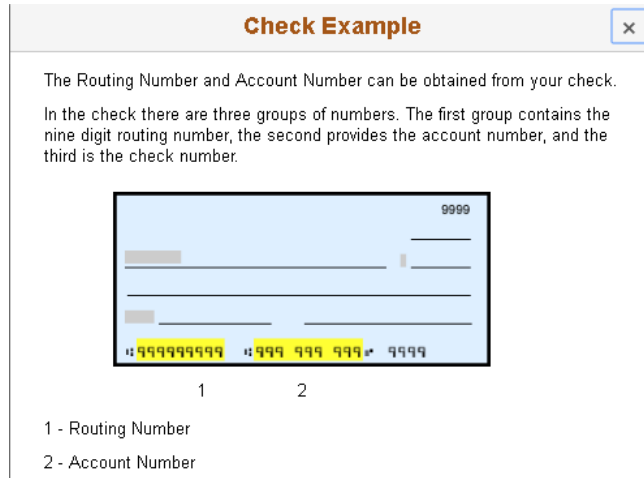
5. Account Type – Select Checking or Savings, depending on the type of account you are setting up.
6. Deposit Type – First account setup must be remaining balance, this is your primary account. If you set up a second account, you can select amount or percentage.
7. Amount or Percentage – When setting up a second account and you select amount or percentage in the Deposit Type, enter an amount or percentage you want to be deposited into this account.
8. A maximum number of 2 accounts can be setup for Direct Deposit Payment Method.

Forgotten User ID/ Password

Recognizing that it is important to keep your information secure, you are required to use a company-defined User ID when logging into the Employee Self Service application.
https://MyHr.portauthority.org
In addition, you will need to define a secret password that must meet the following criteria:

- A minimum of 8 characters
- Include at least one special character
- Include at least one number
- Be different that your last 5 passwords

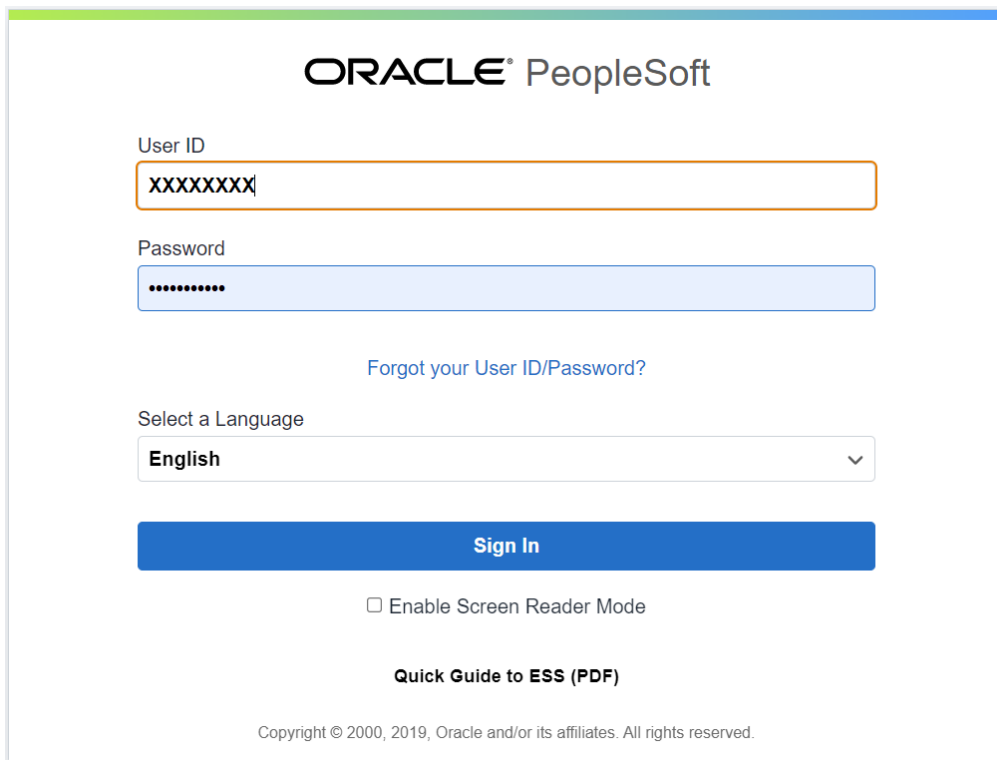If you do not remember your User ID, you will need to contact the Port Authority Employee Self Service Help Line at (412) 566-5333.

If you do not remember your system password, you can click on the link presented on the login page and complete the steps to reset your password.

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User ID

XXXXXXXX

Password

●●●●●●●●●●●

Forgot your User ID/Password?

Select a Language

English

Sign In

☐ Enable Screen Reader Mode

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 After clicking on the link, you will be transferred to the following page. Enter your User ID and click continue.

Forgotten Password

Please enter your User ID below.
You must enter your User ID in all capital letters.
Please call the Help Line at (412) 566-5333 if you do not recall your User ID.

User ID [   ]

[Continue]

On the next page you will need to fill in your Employee number and the last four digits of your Social Security Number. You will also need to answer 2 of your previously answered security questions. You previously had to have answered 3 security questions upon your initial login (see "Special Instructions for your Initial login to the System" below).

If you fail to answer any question correctly, the system will cycle in the third question. After the third failure, you will be instructed to call the Help Line.

Pag Fgt Pwd Qa

User ID ▮▮▮▮▮▮

Description ▮▮▮▮▮

Employee/Retiree Payroll Number [   ]

Last 4 of SSN [   ]

Question 1   What was the name of your best friend as a child?

Answer 1 [   ]

Question 2   Where were you born?

Answer 2 [   ]

[Continue]