

## Employee Self-Service Training Agenda 2 Hour Online Course

### Self-Service Setup Wizard – Setup Manager

- Setup the login page address and SMTP server
  - Testing it out
- Defining a security policy for self-service
  - Strategy for generation of user IDs/passwords
  - Policy for handling forgotten passwords/failed logins
- How to setup/enable the self-service applications
  - Walk through setup, My Self, My Family, My Company
  - Walk through Setup My Paycheck
    - Discuss requirements for Pay Check Detail
  - Walk through the My Time Off configuration screens
    - Defining the process for requesting/approving time off
    - Security requirements for My Team tab
  - Walk through setup Home and setup Custom Tabs
- Open enrollment setup
  - Creating an open enrollment period
  - How to enable/disable employee changes
  - Walk through My Benefits configuration screens
    - Enabling sections
    - Enabling the benefit plans
    - Configuring the comparison screens for benefit plans
    - How to customize instructions and messages
  - Setup approval policies
    - Setup approvers through security & licensing

### Self-Service Administration – Employee Manager

- Accounts tab
  - Enable/disable user accounts
    - Generate/re-set user passwords
    - Sending account information using correspondence wizard
  - New hire enrollment wizard vs open enrollment wizard
  - Monitoring the open enrollment/new hire statuses
  - Approving/rejecting pending changes
  - Reviewing the self-service logs