

# PeopleSoft HCM Update & Roadmap

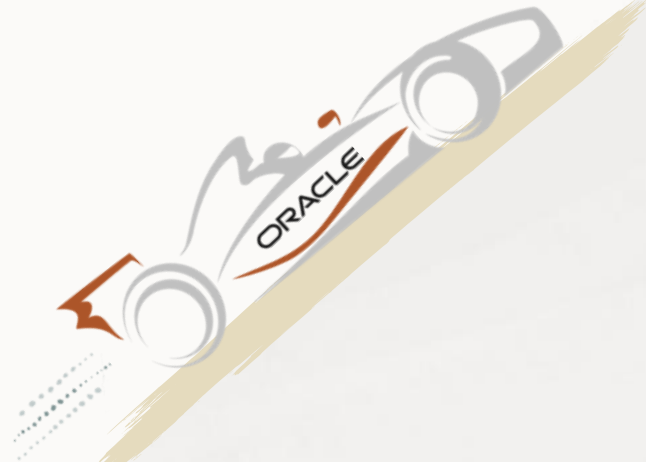
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**Julie Alonso**

Product Strategy

Oracle

[julie.alonso@oracle.com](mailto:julie.alonso@oracle.com)



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# Forward looking statement

## Safe Harbor

Statements in this presentation relating to Oracle's future plans, expectations, beliefs, intentions, and prospects are "forward-looking statements" and are subject to material risks and uncertainties. A detailed discussion of these factors and other risks that affect our business is contained in Oracle's Securities and Exchange Commission (SEC) filings, including our most recent reports on Form 10-K and Form 10-Q under the heading "Risk Factors." These filings are available on the SEC's website or on Oracle's website at <http://www.oracle.com/investor>. All information in this presentation is current as of May 2023 and Oracle undertakes no duty to update any statement in light of new information or future events.

# HCM Strategy Team



**Lisa Chow**

California

- Time & Labor
- Absence Management
- HCM Architecture
- Approvals & Delegation



**Tammy Boyles**

North Carolina

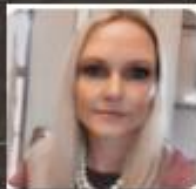
- Benefits
- Recruiting
- Remote Worker
- Questionnaire Framework
- Analytics Workgroup



**Jeremy Pelley**

Texas

- Performance Management
- Profile Management
- Position Management
- Onboarding, Employee Snapshot
- Enterprise Learning Management
- Guided Learning



**Julie Alonso**

California

- Human Resources
  - Compliance
  - Health & Safety
  - Job & Person Data
  - Guided Self Service
- HR Monthly Newsletter
- Customer Go Lives



**Lulu Hernandez**

Mexico

- Global Payroll



**Anne Leung**

California

- Payroll for North America
- Payroll Monthly Newsletter
- Payroll Advisor Webcasts





## Key Announcements

You can **continue to run** on PeopleSoft for a very long time

No plans to end investment or support

Premier Support “through at least” 2034

**Rolling 10+ years of Premier Support**

### Oracle's PeopleSoft Continuous Innovation Releases

Product	Latest Release	GA Date	Premier Support Through at least	Extended Support	Sustainig Support
CRM	20	Oct 2021	Dec 2033	Not Applicable	Indefinite
CS	25	Apr 2022	Dec 2033	Not Applicable	Indefinite
ELM	22	Oct 2021	Dec 2033	Not Applicable	Indefinite
FMS/ESA/SCM	43	Mar 2022	Dec 2033	Not Applicable	Indefinite
HCM <sup>2</sup>	42	Apr 2022	Dec 2033	Not Applicable	Indefinite
Portal Solutions	13	Nov 2021	Dec 2033	Not Applicable	Indefinite

For additional details see the [Lifetime Support Summary for PeopleSoft Releases \(Doc ID 2238983.2\)](#).

Learn more about PeopleSoft support and

Oracle Lifetime Support Policies [here](#)

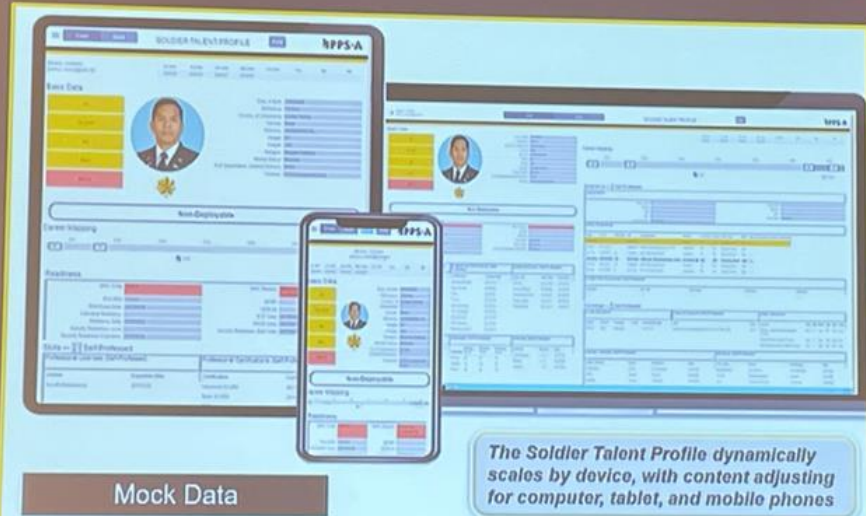


# U.S. Army presenting at BluePrint on their PeopleSoft HCM go-live for 1.3 Million soldiers

## SOLDIER TALENT PROFILE



The Soldier Talent Profile provides Soldiers and leaders with a more holistic view of readiness and Empowers talent management through the display of **KNOWLEDGE**, **SKILLS** and **BEHAVIOR**.



# Working with Customers

Knowledge Space



Focus Groups & User Groups



1:1 Interactions & Conferences



Customer Advisory Board (CAB)



PeopleSoft Product Roadmap

# Customer Advisory Board



## Accepting Applications Now!

- April 2023 – March 2026
- Limited to 30 customers

## Influence Strategic Direction

- New features and technology
- Investment strategies

## Engagement

- Provide input
- Early access to new initiatives

## Networking

- Engage with peers from other organizations
- Engage with Oracle PeopleSoft leadership





# PeopleSoft Investment Strategy



Simplification and  
modernization



Analytics



Cloud and emerging  
technology  
integration



Frameworks to  
eliminate/reduce  
your customizations

# Oracle Investment Strategy

**Compliance / Regulatory Updates**

**Customer Driven Enhancements**

# Continued Delivery of Fluid Applications

**Team Calendar**

Manager Self Service | Home | Search | Notifications | Settings

Team | Starred | Filters | Today | Week | Bi-Weekly

Search Name or Job Title

	3 January Monday	4 Tuesday	5 Wednesday	6 Thursday	7 Friday	8 Saturday	9 Sunday
<b>Rosanna Channing (You)</b> Senior Accounting Manager	8 Hours	8 Hours	8 Hours	8 Hours	8 Hours	Day Off	Day Off
<b>Christelle Stevenson</b> Manager-Accounting	8 Hours	8 Hours	8 Hours	Scrum Training 4.00	8 Hours	Day Off	Day Off
<b>Daryl Reese</b> Financial Analyst	8 Hours	8 Hours	8 Hours	8 Hours	8 Hours	Day Off	Day Off
<b>David Ho</b> Senior Financial Analyst							
<b>Edmund Donahue</b> Manager-Accounting	Jury 8.00 Hrs	Jury 8.00 Hrs	8:00 AM-5:00 PM	Scrum Training 4.00	8:00 AM-5:00 PM	Day Off	Day Off
<b>John Patterson</b> Manager-Revenue	8 Hours	8 Hours	8 Hours	8 Hours	Vacation 8.00 Hrs	Day Off	Day Off
<b>Mei Lee</b> Accountant	8:00 AM-5:00 PM	8:00 AM-5:00 PM	8:00 AM-5:00 PM	8:00 AM-5:00 PM	8:00 AM-5:00 PM	Day Off	Day Off
<b>Shawn Quilligan</b> Financial Analyst	8 Hours	8 Hours	8 Hours	8 Hours	8 Hours	Day Off	Day Off
<b>Vicki Zinn</b> Accountant	8 Hours	8 Hours	8 Hours	8 Hours	8 Hours	Day Off	Day Off

Simplified user experience, mobile & responsive designs, and aligned to the way people work



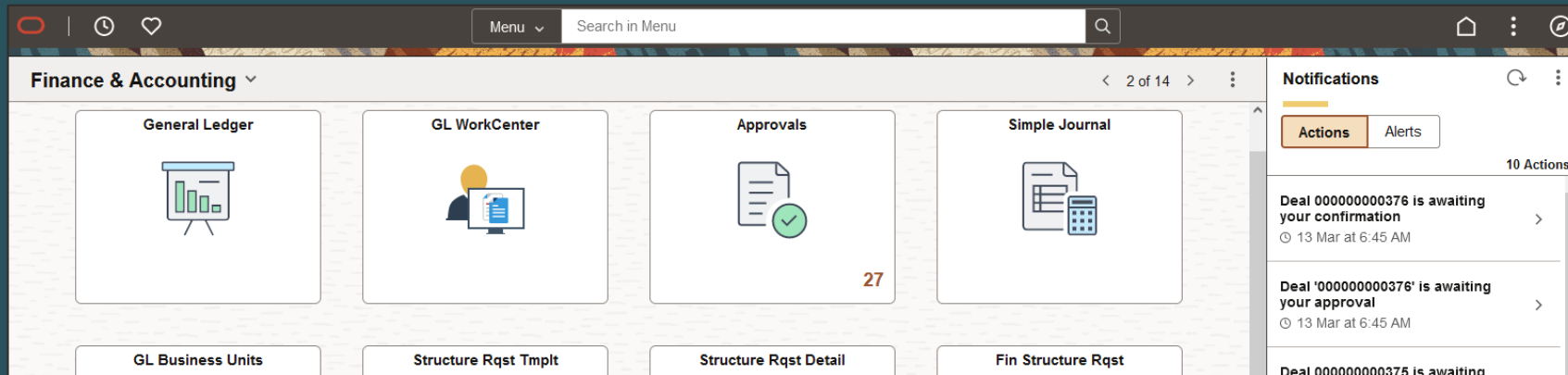
# Layout Changes: What It Looks Like in PeopleTools 8.60

Quick Access Bar always available

Always available global search

Contextual Actions Split

Contextual Title bar

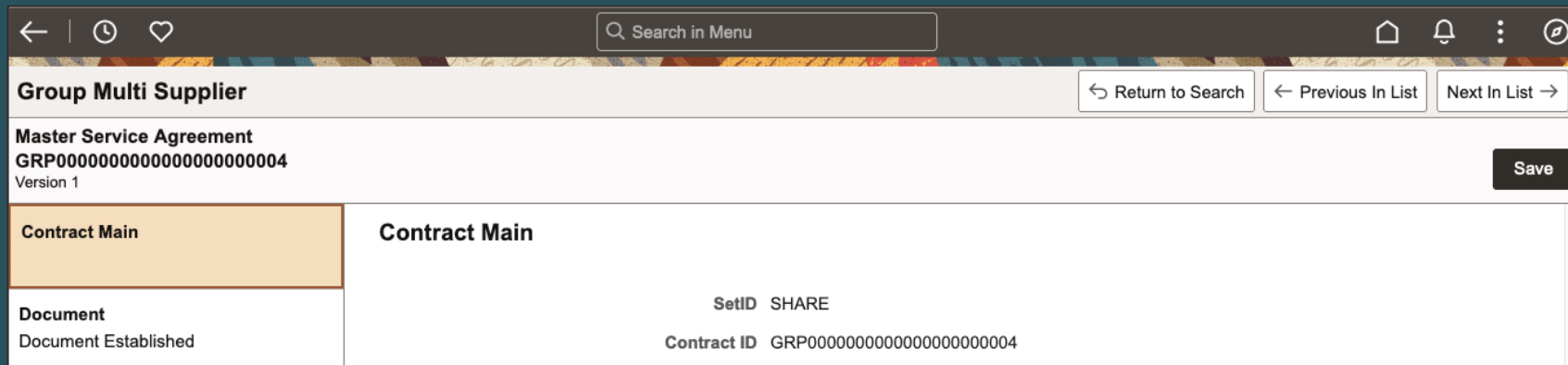


New Redwood Branding

Always available global search

Contextual Actions Split

Contextual Title bar



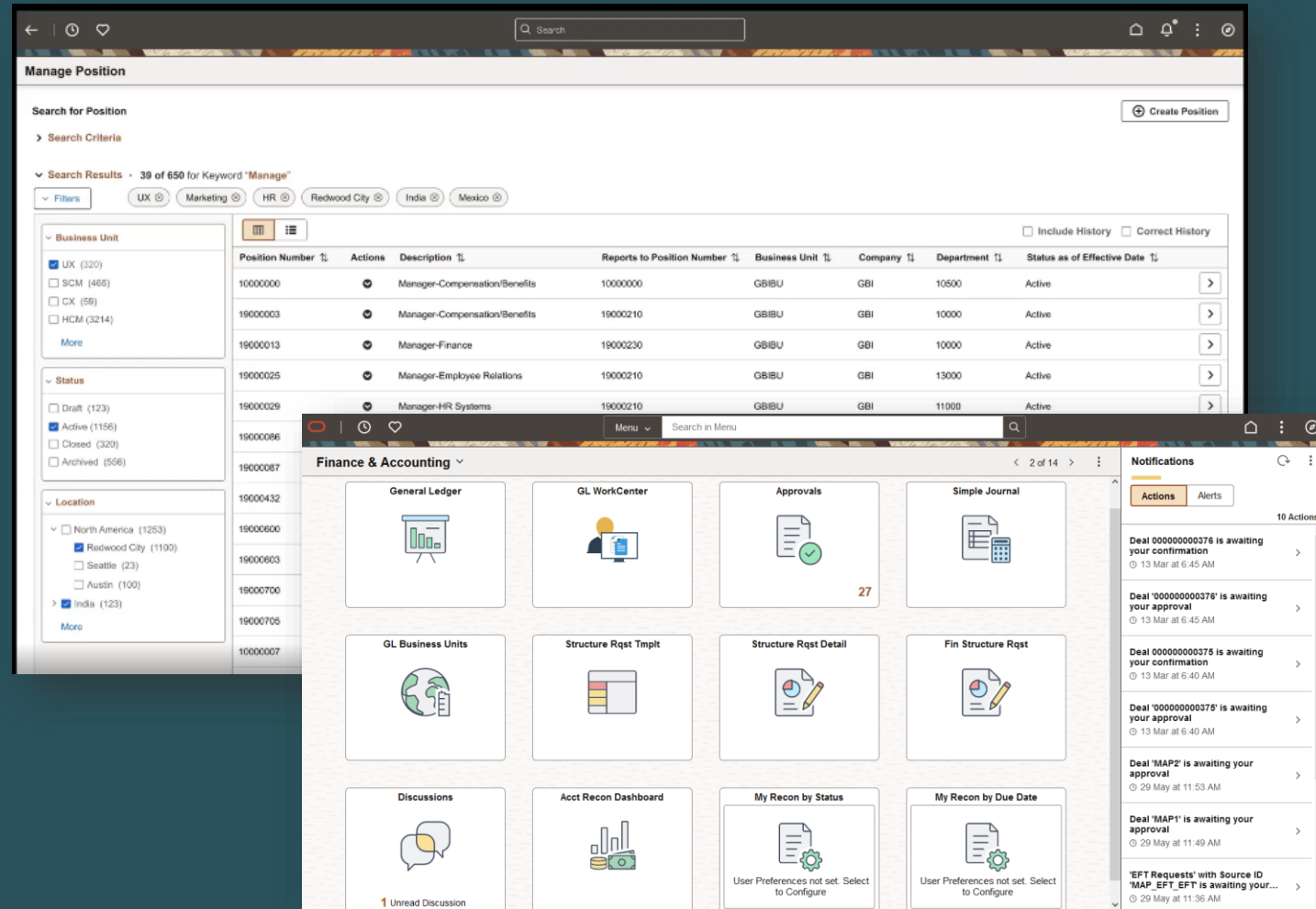
Previous, Next and Return to Search in Contextual Title





# Introducing **Configurable Search** with PeopleTools 8.60

- Centralized configuration of search fields, results fields, layout, and much more
- Switch between **Standard SQL** and **Keyword Search**
- Consistent search experience across all PSFT - Classic and Fluid
- Minimal effort to deploy



Improve usability, search effectiveness and eliminate customizations



# Configurable Search

Identify what the user can input

Search Criteria and Result Options

Load Fields

5 row

Search Criteria		Result Fields		Show All					
Field Name	Field Label	Modify Field Label	Required	Hidden	Display Only	Default Value	Include in Criteria	Criteria Sequence	Field Appearance in
1	BUSINESS_UNIT	Business Unit	<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No		<input checked="" type="checkbox"/> Yes	1	Both Basic & Advanced
2	REQ_ID	Requisition ID	<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No	NEXT	<input checked="" type="checkbox"/> Yes	2	Both Basic & Advanced

Identify what will be displayed in search results

Search Criteria and Result Options

Load Fields

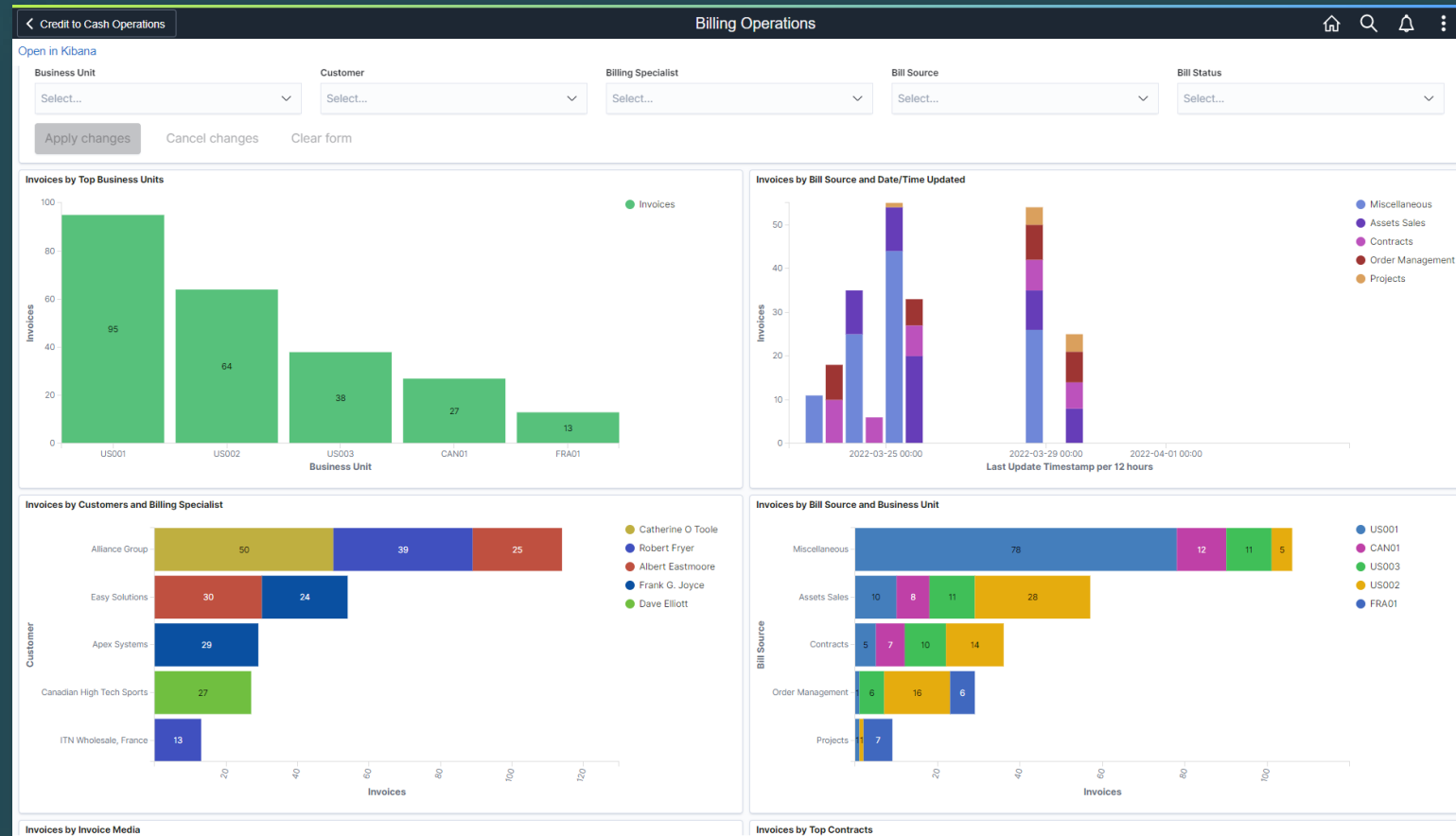
5 row

Search Criteria		Result Fields		Show All		
Field Name	Field Label	Modify Field Label	Include in Results	Include in Small FF	Results Sequence	
1	BUSINESS_UNIT	Business Unit	<input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes	1
2	REQ_ID	Requisition ID	<input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes	2



# Continued Investment in Insights/Analytics/Data Visualization

- Automatically deployed with PeopleSoft, no additional licenses
- **No impact** to online performance, regardless of server load
- Application content embedded across PeopleSoft applications
- Real-time updates to data





# PeopleSoft Intelligent Chat Assistant from Oracle (**PICASO**)



Hello Rosanna. I am PICASO, your PeopleSoft Employee Digital Assistant. Here are some things I can help you with.



## Absence Assistant

For adding/cancelling employee's absence and other absence inquiries

A. Add an absence

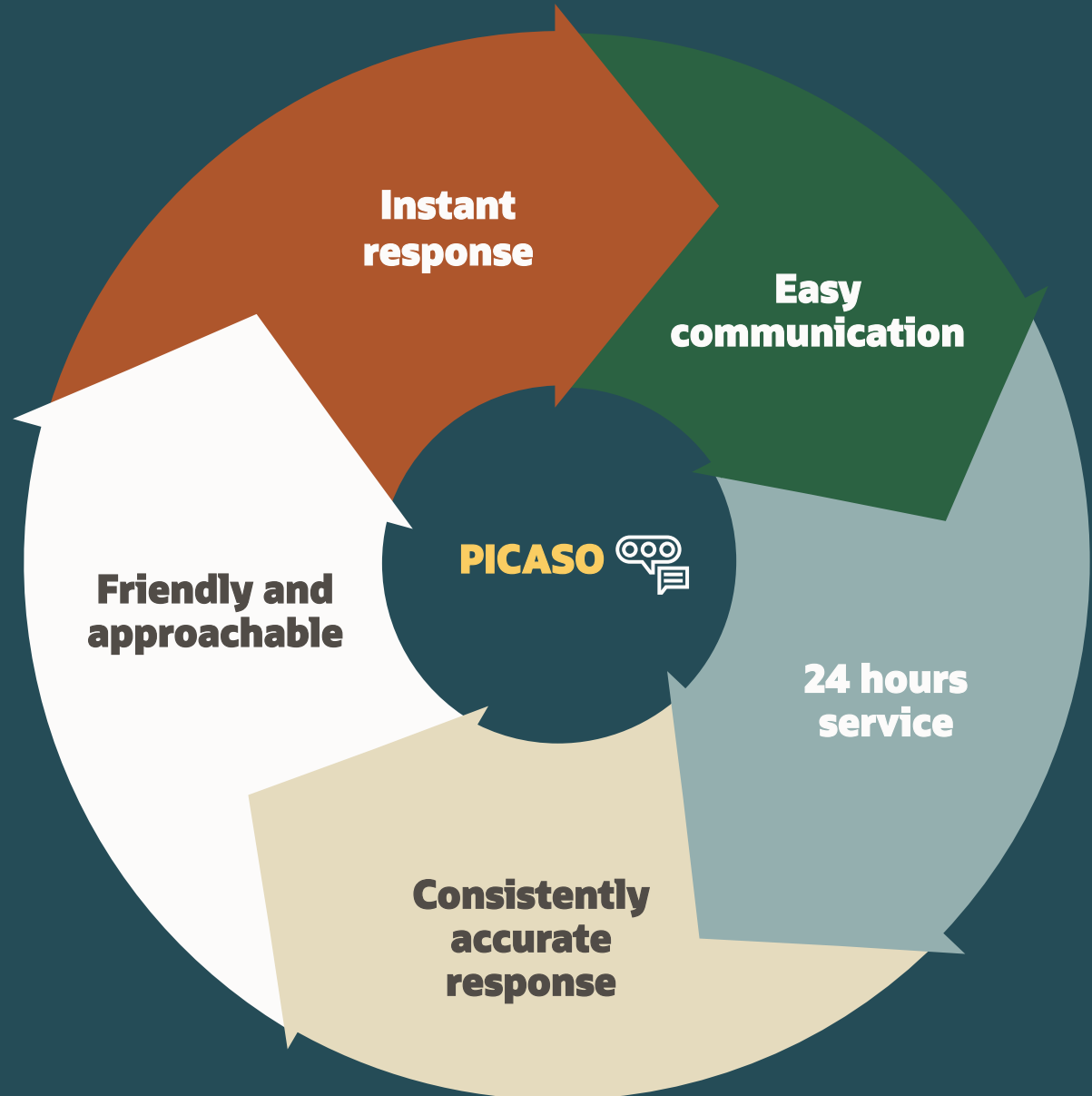
B. How many leaves do I have?

C. How many leaves will I accrue

Add an absence



When does your absence begin?  
(for e.g. 6 June 2022, today)



# Continued Investment in PICASO and Oracle Digital Assistant (ODA)

## Powerful integrated platform



Chatbot Integration  
Framework



### Delivered in the past year

- ✓ Simplified Digital Assistant (DA) setup
- ✓ Enable DA widget across all PeopleSoft pages
- ✓ PICASO DA's across all pillars (HCM, ERP, CS)
- ✓ Animated DA icon
- ✓ Clustering Support

### In process

- Leveraging ODA tester to test skills
- Attachment Support
- Uptake ODA language support and translation services
- View reports and related info in chat client
- Reaction to ODA security updates

### Delivered in the past year

- ✓ Multi-platform support: Teams, Slack, Twilio, etc.
- ✓ Native language support: Arabic, Dutch, French, German, Hindi, Indian English, Italian, Portuguese, Spanish
- ✓ Add draft skills to Digital Assistant (DA) – Rapid development

### In process

- Adding more languages to native support
- Oracle's AI powered voice
- Constant Security upgrades and updates

# A Chatbot Success Story – Sarasota Memorial Healthcare



Marriage Event

Cancel Complete < Previous Next >

Save

Document Upload

Event Value Marriage

Instructions

Each required document listed in the Document List below must be uploaded and approved prior to your enrollment.

Select your Document Type, select Add Attachment, then enter a description, and click the Blue Save/Done Button at the top.

Failure to upload the required Document Types and Documents will cause a delay in your enrollment.

Document List

Document	Upload / Status	Approval / Status
Marriage Certificate/License	Required Attachment Missing	Required
Social Security Card Copy	Optional	Not Required

Add Document

\*Document Type: Gov't Issued Marriage License

No Document has been attached.

Add Attachment Add Note

View Document

View All Yes

“Our Benefits Team saw a sizeable reduction in contacts as Benny was able to answer level 1 type questions such as, “when is the enrollment window” and “what is my current coverage/cost”.

Benny saw a total of **9.2K interactions during our enrollment window** and the Benefits Team noted a significant reduction in customer service contacts.”

Tina Cianfrani, Sarasota Memorial Health Care System





## HCM Roadmap

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Customer  
requested ideas  
and compliance

1

Ideas Space on My Oracle Support

2

Focus Group ideas, use cases, priorities

3

Regulatory and Legislative Compliance

# Human Resources

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## Form I-9 Announcement

- **Changes:**
  - Form Expired on 10/31/2022
  - New form – October 2023
- **Remote Verification Ends July 31**
- (ICE) announced organizations have a 30-day grace period to **comply with physical Form I-9 document inspection requirements.**
- Employers that were conducting the I-9 process virtually over the last three-plus years **will be required** to conduct a physical inspection of **original documents related to those prior remote I-9 completions by Aug. 30.**

### Employment Eligibility Verification

Instructions

Start Over

Department of Homeland Security  
U.S. Citizenship and Immigration Services

USCIS  
Form I-9  
OMB No. 1615-0047  
Expires 10/31/2022

► **START HERE:** Read instructions carefully before completing this form. The instructions must be available, either in paper or electronically, during completion of this form. Employers are liable for errors in the completion of this form.

**ANTI-DISCRIMINATION NOTICE:** It is illegal to discriminate against work-authorized individuals. Employers **CANNOT** specify which document(s) an employee may present to establish employment authorization and identity. The refusal to hire or continue to employ an individual because the documentation presented has a future expiration date may also constitute illegal discrimination.

#### Section 1. Employee Information and Attestation

(Employees must complete and sign Section 1 of Form I-9 no later than the **first day of employment**, but not before accepting a job offer.)

Last Name (Family Name)  ?

First Name (Given Name)  ?

Middle Initial  ?

## ESS Address Configurability

Ability to configure additional addresses, email & phone in employee self-service

### Addresses



**Rosanna Channing** ✓  
Senior Accounting Manager

#### Home Address

1430 North West Blvd  
Apt B215  
Guttenberg, NJ 07093

Current



#### Mailing Address

1430 North West Blvd  
Apt B215  
Guttenberg, NJ 07093

Current



#### Legal Address

No Legal Address exists.

[Add Legal Address](#)

Delivered in  
Image 46

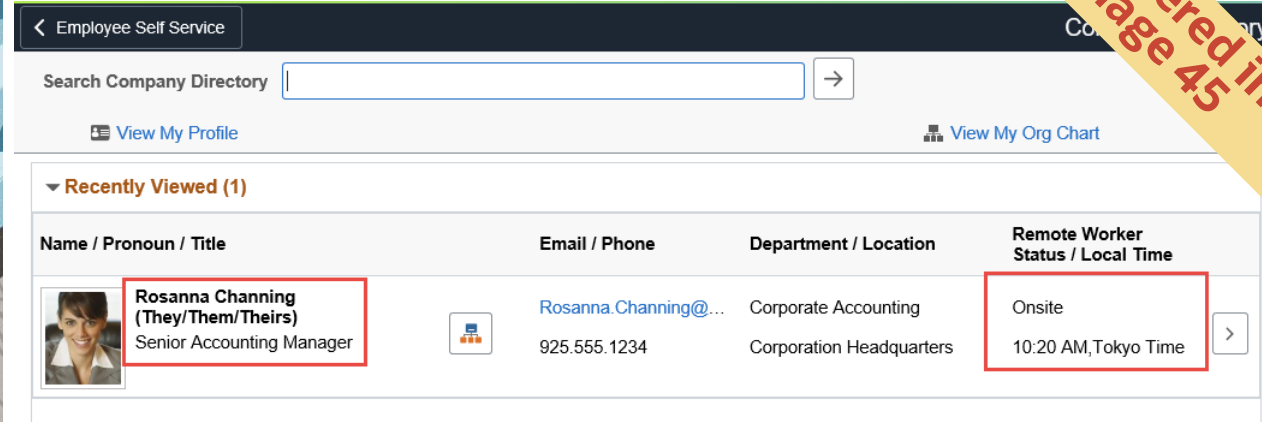
*Navigation: Setup HCM > Common Definitions > Self Service > Address & Contact Configuration*



## Fluid Company Directory

Ability to configure additional fields to display in company

- **Display additional fields:**
  - Pronouns (next to name)
  - Remote Worker Status
  - Local Time




Employee Self Service

Search Company Directory

[View My Profile](#) [View My Org Chart](#)

Recently Viewed (1)

Name / Pronoun / Title	Email / Phone	Department / Location	Remote Worker Status / Local Time
 <b>Rosanna Channing</b> (They/Them/Theirs) Senior Accounting Manager	<a href="mailto:Rosanna.Channing@...">Rosanna.Channing@...</a> 925.555.1234	Corporate Accounting Corporation Headquarters	Onsite 10:20 AM, Tokyo Time

Delivered in  
Image 45

Navigation: Setup HCM > Common Definitions > Org Chart Viewer > Chart & Profile Settings > Profile Content >

Org View Type = Fluid Company Directory > Profile Content Tab



## Fluid Header Display

Ability to configure additional fields to display in ESS/MSS

- **Display additional fields:**
  - Pronouns (next to name)
  - Emplid/Rcd #
  - Business Title
  - Dept
  - Location
  - Full-Time/Part-Time Status
  - + many more fields

### Total Rewards



**Victoria Zinn** (She/Her/Hers)  
Accountant, KU0059  
Global Business Institute - Corporate Accounting

Reward

Summary

**Summary**

This is your Total Rewards Statement for t

Compensation

### Team Time

Timesheet

**Report Time**

Weekly Time Entry

### Report Time



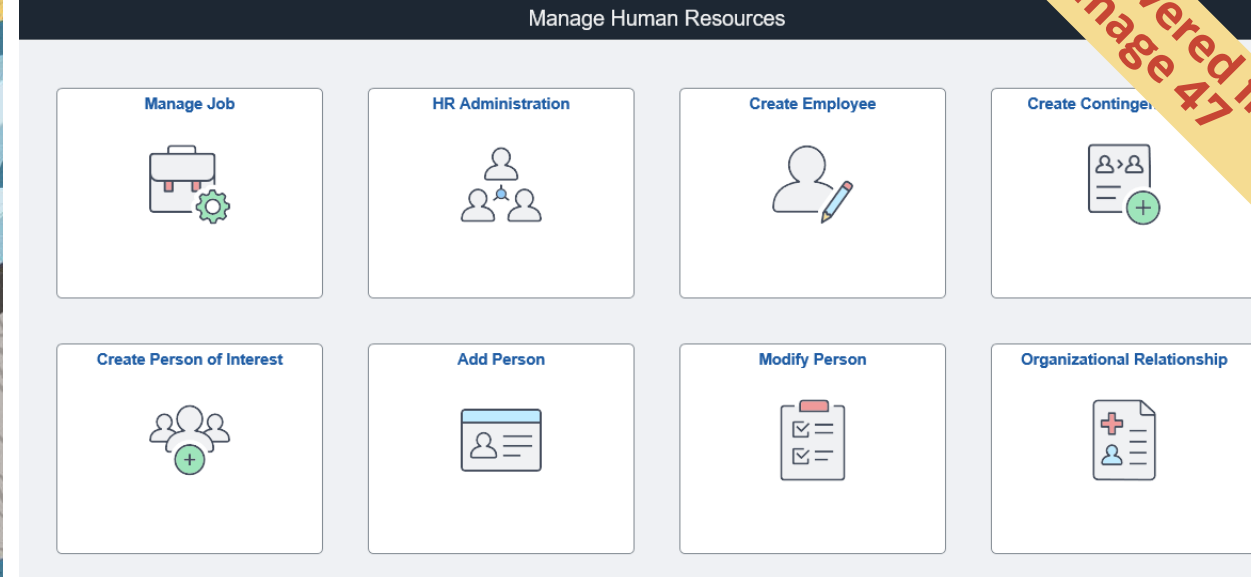
**Mei Lee**  
KU0076 - 0, Part-Time  
Corporate Accounting

[Return to Select Employee](#)

## Modernization of Personal Data

Personal Data has been modernized for the HR Administrator providing a streamlined process to enter personal data for employees.

- **Additional Enhancements:**
  - Ability to Add Attachment
  - Fluidization of Personal Data
  - Search for Potential Duplicates
  - Easy steps to Add Person and Job Row
  - Ability to Modify a Person
  - Added Drop Zones
  - Approvals (optional)
  - Reduced number of clicks



# Remote Worker - Address Update

- Seamless Process for Employee to Verify and Update Address
- HR Approvals Can Still be Required
- Remote Worker Manager sees proposed change

**Remote Worker Request**

Christelle Stevenson  
Manager-Accounting

Guidelines: Visited

Acknowledgement: Complete

**Verify Address**: Visited

Request Details: Not Started

Attachments: Not Started

Workplace Support: Not Started

Review and Submit: Not Started

**Verify Address**

**Home Address**  
2139 Arctic Boulevard  
Anchorage, AK 99521

**Mailing Address**

2139 Arctic Boulevard  
Anchorage, AK 99521

**Home Address**

Instructions: To save United States addresses at least one of the following fields must get populated: Address 1, Address 2, Address 3

Change As Of: 10/17/2023

Address Type: Home

\*Country: United States

Address 1: 1234 Main Street

Address 2:

Address 3:

City: Nashville

State: Tennessee

Postal: 37207

**Remote Worker Request**

Christelle Stevenson  
Manager-Accounting

Guidelines: Visited

Acknowledgement: Complete

**Verify Address**: Visited

Request Details: Not Started

Attachments: Not Started

Workplace Support: Not Started

Review and Submit: Not Started

**Verify Address**

Home Address	Current	As of	Status
2139 Arctic Boulevard Anchorage, AK 99521	Current		
1234 Main Street Nashville, TN 37207	As of 10/17/2023	Submitted for Approval	

**Mailing Address**

2139 Arctic Boulevard  
Anchorage, AK 99521

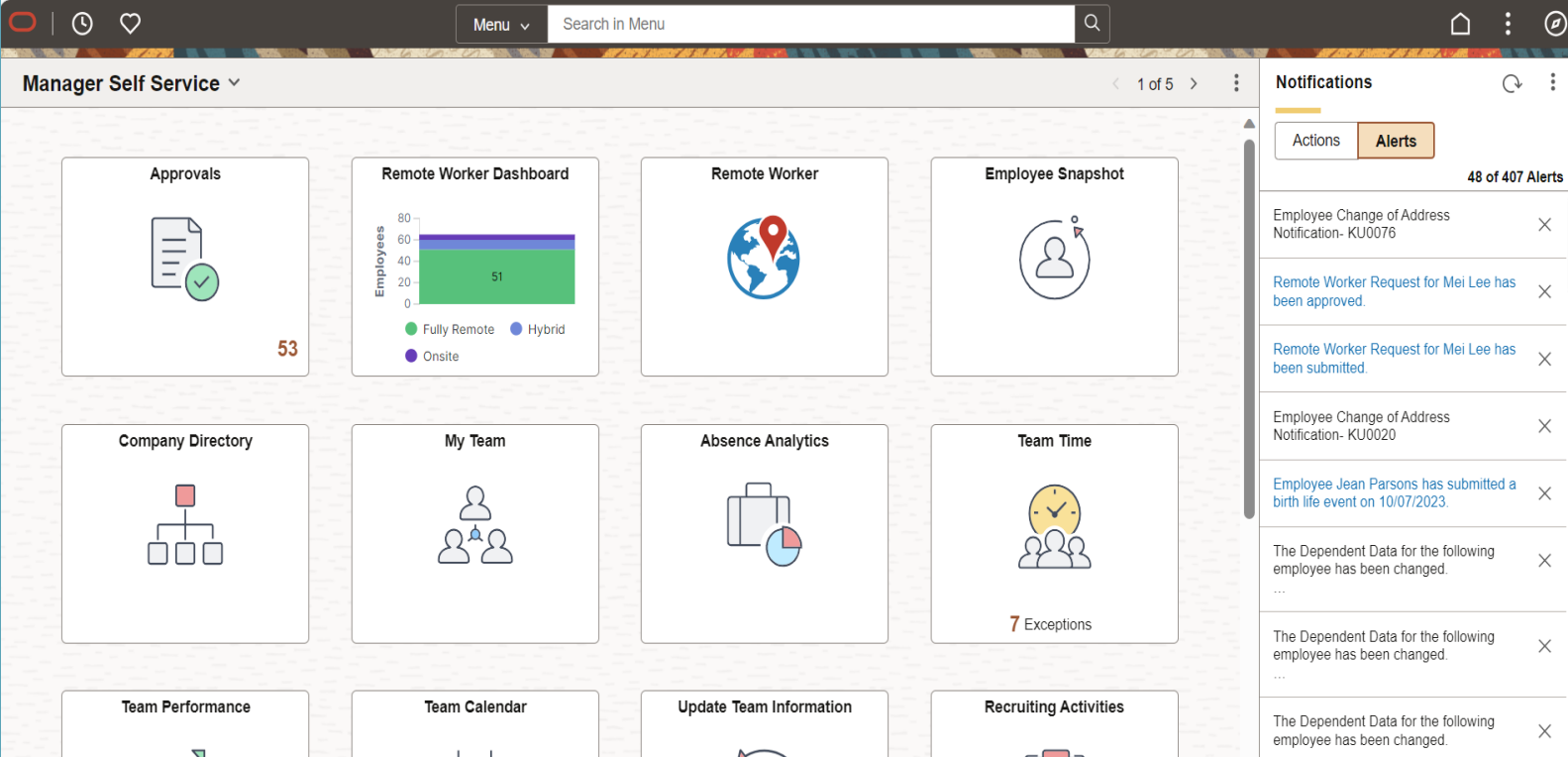
Image 46





# Remote Worker- Payroll Administrator Notification

- After Approval is Completed
- Alert/Notification to the Payroll Admin



The screenshot displays the Oracle Manager Self Service interface. The main dashboard includes several widgets: Approvals (53), Remote Worker Dashboard (a bar chart showing 51 employees: Fully Remote, Hybrid, and Onsite), Remote Worker, Employee Snapshot, Company Directory, My Team, Absence Analytics, Team Time (7 Exceptions), Team Performance, Team Calendar, Update Team Information, and Recruiting Activities. A Notifications panel on the right shows 48 of 407 alerts, including a notification for 'Employee Change of Address Notification- KU0076' and 'Remote Worker Request for Mei Lee has been approved.'

Image 47

## “Preferred/Chosen/Lived” Name

Ability to configure additional name fields to display is self-service/Personal Data

- **Display additional fields:**
  - Preferred Middle Name
  - Preferred Last Name
  - Preferred Second Last Name
  - Ability to search by Legal and/or Preferred

Cancel Change Preferred Name

---

**Current Preferred Name**  
Bobby Locherty

---

**Proposed Preferred Name**

Change As Of   Example: 12/31/2022

Preferred/Lived First Name

Preferred/Lived Last Name

Preferred/Lived Middle Name

---

**Your Name will be Displayed As**  
Bobbie Locherty

Coming  
Soon

# Roadmap for Human Resources\*

**Analytics for Job Data**

**Modernization of  
Manage Hires**

**Analytics for Personal  
Data**

**Remote Worker -**

- Enhance Employee Update Request
- Granular Breakdown of Remote Worker Status on Job Code and Position Data

**PreBoarding**

**Preferred Names**

**Tuition Reimbursement**

**Team Calendars for  
Administrators,  
Business Partners, and  
Delegates**

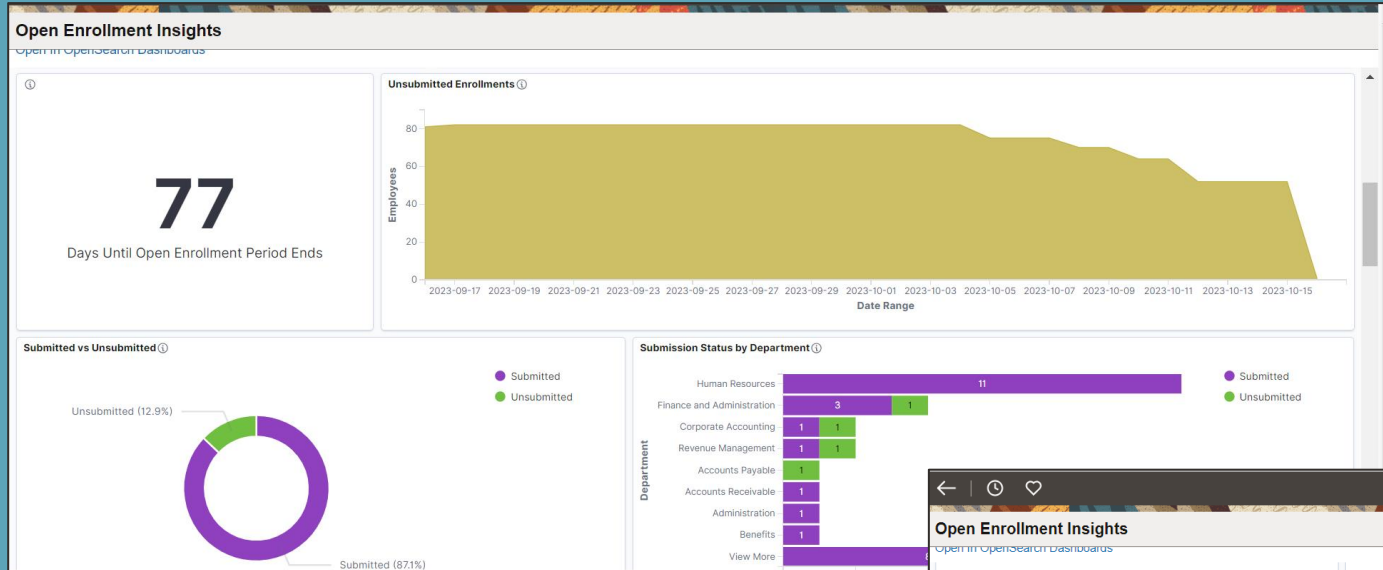
# Benefits

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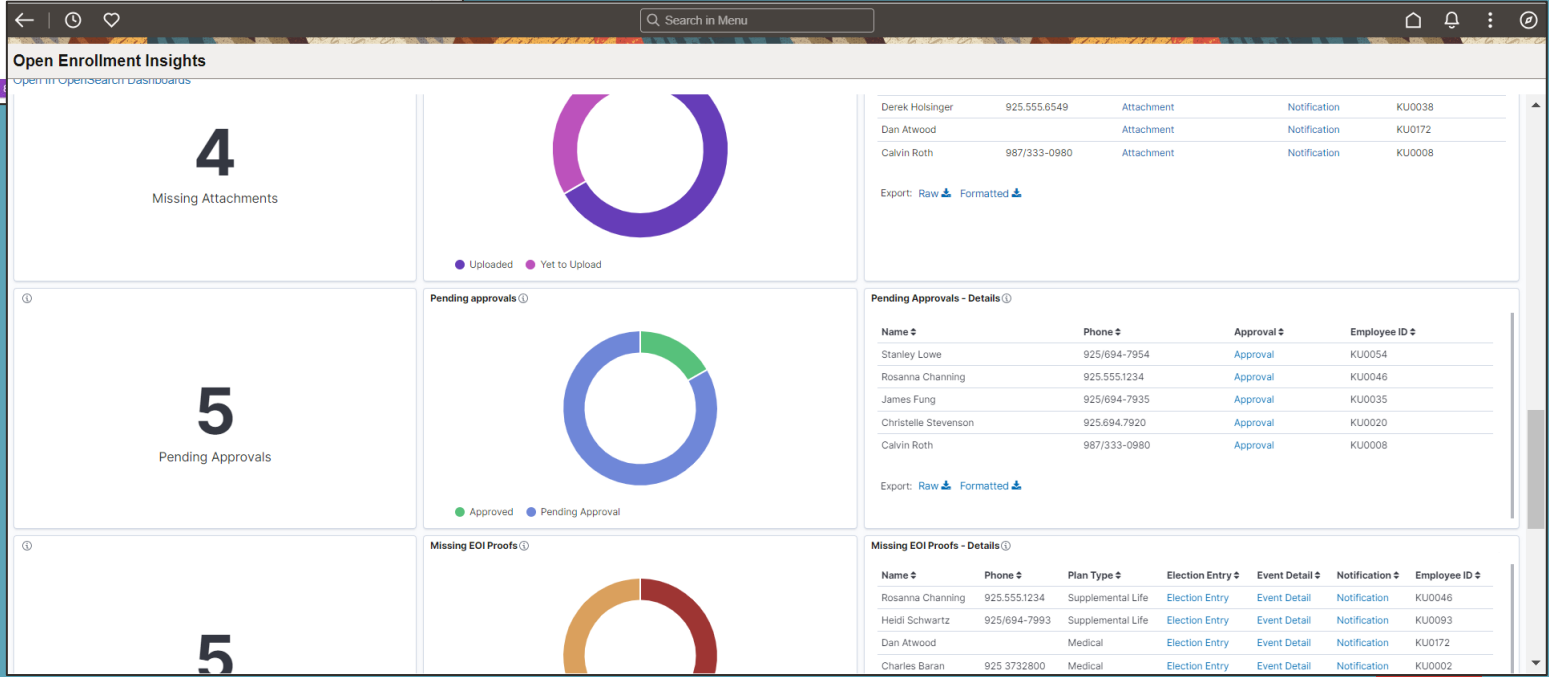




# Open Enrollment Insights



## [PeopleSoft Benefits Insights - YouTube](#)



# Health Savings Account Worksheet

**Health Savings Account**

**Enroll in Your Plan**

**Plan Name**

- HSA Plan  
Requires enrollment to Medi
- Waive

**Contribution Amount**

You may enter your total elected annual contribution. You are certifying that you meet all qualification requirements for excess contributions. You may select the Health Savings Account contribution amount.

Employee Annual Contribution

Phone: 646/350-2222  
Email: HCMBENuser1@mailtest.com  
Resources: Aetna U. S. Healthcare General

**Health Savings Account Worksheet**

You may use this worksheet to estimate your per pay period contribution or annual contribution. Select Calculate to update the estimates.

\*Estimate Contribution From: Annual Contribution

Your New Annual Contribution: 5,560.00

Minus Your Year To Date Contributions: 0.00

Divided by Pay Periods Remaining: 12

Estimated Per Pay Period Contribution: 463.33

Calculate

Maximum Total Annual Contribution \$8,750

Health Savings Account Worksheet



# Right Panel Configuration

## Enrollment Contacts

Contact Group ALLEVENT

**Contact Details**

🔍
|
⏪
<
1 of 2
>
⏩
|
View All

Effective Date  📅

Description

\*Contact and Resources Panel  ▾

Status  ▾

+ -

**Contact Components**

Component	Contact ID	Contact Description		
<input type="text" value="BNE_CARD_SUMM"/> 🔍	<input type="text" value="1"/> 🔍	Benefits Administration	+	-
<input type="text" value="BNE_PLAN_1X_FL"/> 🔍	<input type="text" value="2"/> 🔍	Health Benefits Administration	+	-
<input type="text" value="BNE_PLAN_2X_FL"/> 🔍	<input type="text" value="3"/> 🔍	Life Insurance Administration	+	-
<input type="text" value="BNE_PLAN_3X_FL"/> 🔍	<input type="text" value="3"/> 🔍	Life Insurance Administration	+	-
<input type="text" value="BNE_PLAN_4X_FL"/> 🔍	<input type="text" value="1"/> 🔍	Benefits Administration	+	-
<input type="text" value="BNE_PLAN_5X_FL"/> 🔍	<input type="text" value="1"/> 🔍	Benefits Administration	+	-

# Life Event – Provide Administrator Cleanup Capability

**AG Composer Categories**

Category: Security, Context, Actions, Images, Assignees, Steps, Notifications

Activity Guide Category: LIFEEVENT

Category Attributes

- \*Effective Date: 01/01/2023
- \*Description: Life Event
- \*Long Description: Life Event
- \*Root Package ID: W3EB\_LIFE\_EVENT\_FL
- \*Path: AGCCategory

**Activity Guide Composer**

Template: EF\_B2FF  
Effective Date: 2023-01-01

Selected Steps

Step Type	Move Up	Move Down	Step Description	Configure Group Step	Configure Attributes	Configure Dependencies	Configure Page Text
Step			Welcome to the Birth Event				
Step	▲	▼	Birth Date				
Step	▲	▼	Document Upload				
Step	▲	▼	Benefits Summary				
Step	▲	▼	Dependent/Bene				

**AG Composer Tiles**

Tile: LIFEEVENTS

Tile Information

- \*Title: Complete Life Events
- \*Category: Life Event

Define Activity Guide Page Controls

- View Activity Guides: Yes
- Start Activity Guide: No
- Root Package Id: [Field]

[Clean Up those Open Life Events Using the Multiple User Activity Guide Configuration \(oracle.com\)](https://www.oracle.com/...)

Knowledge Document - [2976208.1](#)



# Approval Links on Benefits WorkCenter

### Benefits WorkCenter

ACA Exceptions ▼

Eligibility Status TBD 22

▼ **My Approvals**

Benefits Approval ▼

Benefits Document Filing 1

Dependent Updates 5

▼ **Links**

Employee/Dependent Information ▼

Enroll in Benefits ▼

Enrollment Administration ▼

FSA Administration

### Dependent Updates

Pending Approvals

Approve
Deny

5 rows

<input type="checkbox"/>			
<input type="checkbox"/>	<b>Dependent Updates</b> James Fung	Dependent Candice Fung	Routed 10/08/2023 >
<input type="checkbox"/>	<b>Dependent Updates</b> Stanley Lowe	Dependent Sylvia Lowe	Routed 10/08/2023 >
<input type="checkbox"/>	<b>Dependent Updates</b> Rosanna Channing	Dependent Jason Channing	Routed 10/09/2023 >
<input type="checkbox"/>	<b>Dependent Updates</b> Christelle Stevenson	Dependent Russell Stevenson	Routed 10/10/2023 >
<input type="checkbox"/>	<b>Dependent Updates</b> Calvin Roth	Dependent Ema Roth	Routed 10/10/2023 >



# SECURE 2.0 Act

[\*\*Congressional Bill\*\*](#)

[\*\*PeopleSoft Chat Podcast\*\*](#)

[\*\*SECURE 2.0 – Hot Topic -  
Quest Oracle Community\*\*](#)

[\*\*IRS Announces an  
Administrative Transition  
Period for Section 603 of  
the SECURE 2.0 Act  
\(oracle.com\)\*\*](#)

[\*\*Top 10 Frequently Asked  
Questions to PeopleSoft  
about SECURE 2.0  
\(oracle.com\)\*\*](#)



# SECURE 2.0 Roadmap



Section 109 – Super Catchup for Age 60 to 63

415(c) Age Limits

Section 101 – Contribution Range for Auto Enrollment

Section 603 – Catch Up Contribution designated to Roth

# Recruiting Solutions





# Roadmap for Recruiting Solutions\*

## Enhanced Manage Job Opening and Manage Applicants

- includes additional applicant information and sorting
- configuration options for the display of confirmation message when an applicant is rejected or marked as reviewed
- hide recruitment phases on the Manage Job Opening page

## Capability for Applicant Print Job Submitted Application

## Capture SSN and DOB with Job Offer

## Next Applicant Review Date

## CG Preferred Method of Contact

# Payroll for North America

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# BI Publisher Bulk Printing

Form 1042-S & Form 1099-R

- Beginning with Tax Year 2022, PeopleSoft supports the bulk printing of Form 1099-R and Form 1042-S using BI Publisher
- **Form 1099-R**
- **Form 1042-S**
- **Blank Front and Instructions on Back**

The image displays four copies of tax forms. The top two are Form 1099-R for 2022, showing the front side with fields for gross distribution, taxable amount, and recipient information. The bottom two are also Form 1099-R for 2022, showing the back side with state and local tax withholding information. To the right of the 1099-R forms is a Form 1042-S for 2022, showing the front side with fields for income code, gross income, withholding allowance, and recipient information. The forms are arranged in a grid-like fashion, with some overlapping.

Delivered in Image 45



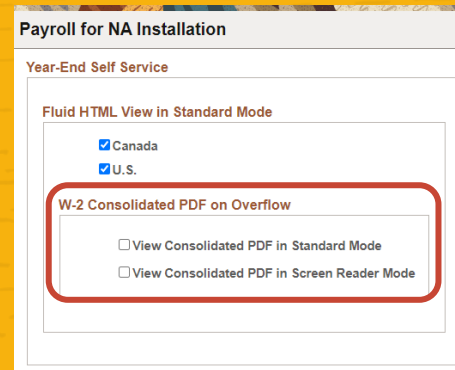
# Employee Self-Service Form W-2 Accessible Overflow PDF

## Form W-2 PDF Accessible

PDF version of the Form W-2 are now accessible to be used with a screen reader

## Single Page Accessible

Accessible PDF only work by viewing single page at a time in overflow mode.

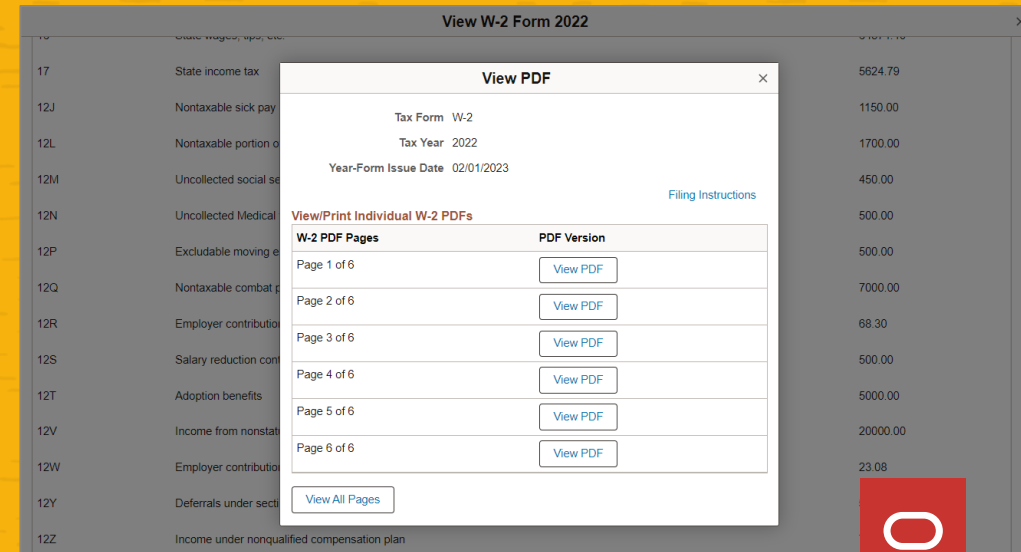


## Overflow Form W-2 PDF Accessible

Screen reader accessible overflow PDF pages for multiple states, localities, and more than 4 boxes for 12 or 14, for the Form W-2

## View All PDF Pages Non-Accessible

Option to enable "View All Pages" button to see PDF pages in one file, but pages are not accessible.





# Program Funding Configuration Reuse Tax Classes & Alternative Calculation

Allow Paid Family and Medical Leave (PFML) tax classes to be reused in customer defined Program IDs. Plus, evaluate program taxes when wages are not paid in the state.

- Track taxes under same tax classes for different rules**  
 Enables the ability for the same taxes calculated for different rules to be grouped for reporting purposes. For example, union vs. non-union employees or employer exemption for Colorado for employers with less than nine employees.
- Evaluate program taxes when no wages in State**  
 Selecting “Evaluate Program Taxes When No Wages in this State” will enforce the system to calculate the taxes for state program rules even when there are no wages to determine if taxes are need be taken.
- Reciprocity Rule 4**  
 The system will calculate PFML taxes when wages are not paid in Unemployment Insurance (UI) state if Reciprocity Rule 4 used between reciprocity states.

\*Targeted

Program ID Association

State OR Oregon

Program ID Details

\*Program ID Z004 Z004

Tax Class Details

Effective Date 01/01/2023 \*Status Active

Effective Sequence 3

\*Maintenance Responsibility Customer

\*Company State Tax Data Option Rate Percent

Employee Rate Percent Default 0.000000000 Employer Rate Percent Default 0.000000000

Evaluate Program Taxes When No Wages in this State

Tax Class Configuration

*Tax Class	Display Tax Rate	Display Ratio	Ratio ID	*Calc Rule ID	View Details
Paid Fam Med Leave Ins EE	<input type="checkbox"/>	<input type="checkbox"/>		Z011	Z011
Paid Fam Med Leave Ins ER	<input type="checkbox"/>	<input type="checkbox"/>		Z012	Z012

Delivered in  
Image 46

## Benefits

- Allow customers to reuse existing tax classes which will help tax reporting for the same PFML program but with alternative rules.
- Calculate PFML taxes even when wages are not paid for the same state worked.

# Form 1042-S & Form 1099-R Employee Self-Service

Payees will be able to view their Form 1042-S and Form 1099-R online. Additionally, employees can consent to receive only online copies only. Administrators will be able to administer the process.

## Fluid Self-Service

Payees after being granted permissions roles will be able to view Form 1042-S and Form 1099-R online.

## Accessible HTML

Payees will have access to Accessible for All HTML online pages, whether in standard or accessible mode.

## Consent & Reset Consent

Payees can grant consent online to not send paper versions of forms. Administrators can control consent.

Delivered in Image 47

<b>Form 1099-R</b> <input type="checkbox"/> CORRECTED (if checked) <span style="float: right;">OMB No. 1545-0046 <b>2022</b></span>			<b>Form 1099-R</b> <input type="checkbox"/> CORRECTED (if checked) <span style="float: right;">OMB No. 1545-0046 <b>2022</b></span>		
1 Gross distribution \$ <span style="float: right;">2a Taxable amount \$</span>			1 Gross distribution \$ <span style="float: right;">2a Taxable amount \$</span>		
2b Taxable amount not determined \$ <span style="float: right;">Total distribution \$</span>			2b Taxable amount not determined \$ <span style="float: right;">Total distribution \$</span>		
PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and phone no.			PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and phone no.		
PAYER'S TIN		RECIPIENT'S TIN	PAYER'S TIN		RECIPIENT'S TIN
3 Capital gain (included in box 2g) \$		4 Federal income tax withheld \$	3 Capital gain (included in box 2g) \$		4 Federal income tax withheld \$
6 Net unrealized appreciation in employer's securities \$		7 Distribution code(s) <small>12a</small>	6 Net unrealized appreciation in employer's securities \$		7 Distribution code(s) <small>12a</small>
9a Your percentage of total distribution %		9b Total employee contributions \$	9a Your percentage of total distribution %		9b Total employee contributions \$
RECIPIENT'S name, street address, city or town, state or province, country, and ZIP or foreign postal code					
Account number (see instructions)		11 Year of orig./ch. code	10 Amount allocable to RR within 3 years \$		14 State tax withheld \$
14 State tax withheld \$		15 State/Payer's state no.	16 State distribution \$		17 Local tax withheld \$
17 Local tax withheld \$		18 Name of Locality	19 Local distribution \$		20 Other \$
File this copy with your state, city, or local income tax return, when required.					
<b>Form 1099-R</b> <input type="checkbox"/> CORRECTED (if checked) <span style="float: right;">OMB No. 1545-0046 <b>2022</b></span>			<b>Form 1042-S</b> <input type="checkbox"/> <b>Foreign Person's U.S. Source Income Subject to Withholding</b> <span style="float: right;">OMB No. 1545-0086 <b>2022</b></span>		
1 Gross distribution \$ <span style="float: right;">2a Taxable amount \$</span>			1 Income code <span style="float: right;">2 Chapter indicator: Enter "3" or "4"</span>		
2b Taxable amount not determined \$ <span style="float: right;">Total distribution \$</span>			3a Exemption code <span style="float: right;">4a Exemption code</span>		
PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and phone no.			3b Tax rate <span style="float: right;">4b Tax rate</span>		
PAYER'S TIN		RECIPIENT'S TIN	13e Recipient's U.S. TIN, if any		13f Ch. 3 status code
3 Capital gain (included in box 2g) \$		4 Federal income tax withheld \$	13g Ch. 4 status code		13h Recipient's GIN
6 Net unrealized appreciation in employer's securities \$		7 Distribution code(s) <small>12a</small>	13i Recipient's date of birth (YYYYMMDD)		13j Recipient's foreign tax identification number, if any
9a Your percentage of total distribution %		9b Total employee contributions \$	13k Recipient's account number		13l LOB code number, if any
RECIPIENT'S name, street address, city or town, state or province, country, and ZIP or foreign postal code					
Account number (see instructions)		11 Year of orig./ch. code	10 Amount allocable to RR within 3 years \$		14 State tax withheld \$
14 State tax withheld \$		15 State/Payer's state no.	16 State distribution \$		17 Local tax withheld \$
17 Local tax withheld \$		18 Name of Locality	19 Local distribution \$		20 Other \$
File this copy with your state, city, or local income tax return, when required.					
Department of the Treasury Internal Revenue Service www.irs.gov/Form1099-R			Department of the Treasury Internal Revenue Service www.irs.gov/Form1042-S		
<b>Copy C For Recipient's Records</b> This information is being furnished to the Internal Revenue Service.					

RECIPIENT COPY



# Roadmap for Payroll for North America

**U.S. Remote Worker  
Tax Enrollment  
and  
Distribution**

**Concurrent Processing  
Actual Distributions**

**Select All for OK to Pay**

**Fluid Paycheck Modeler**

**W-2/W-2C Tax Prepare Opt-  
In/Out Employee Self Service**



# Absence Management





# Roadmap Absence Management\*

**Fluid Leave Donations**

**Team Calendar for  
Delegates**

**Team Calendar for  
Administrators**

**Team Calendar for  
Business  
Partners/Matrix  
Teams**

**Add Absence Start and  
End Times**

# Time and Labor

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# Direct Reports Navigation Collection

Delivered in Image 47

The screenshot displays the 'Team Time Directs' application interface. At the top, there is a navigation bar with a search box labeled 'Search in Menu' and several utility icons. Below this, the main content area is titled 'Team Time Directs'. On the left, a vertical navigation menu is visible, with 'Enter Time' highlighted in orange. The main content area is titled 'Enter Time' and includes a sub-section 'Find Team Member'. Below this, there is a 'Team Members' section with a table listing 8 rows of team members. The first two rows are visible, showing details for Christelle Stevenson and Daryl Reese.

Job Title	Department	Location	Position
Manager-Accounting	Accounts Receivable	Corporation Headquarters	19360018
Employee	Onsite	Hours to be Approved	0
Exceptions			0
Job Title <th>Department</th> <th>Location</th> <th>Position</th>	Department	Location	Position
Financial Analyst	Corporate Accounting	Corporation Headquarters	
Employee	Onsite	Hours to be Approved	0
Exceptions			0

## Direct Reports Time Pages

Secure Manager Time pages using the Direct Access Framework, like other Manager Self Service pages.

- No manual maintenance when managers or time reporters move
- Able to use both Direct Reports and Dynamic Group Security – thru separate tiles
- Select between 7 different access types
- Provided process to maintain access type structure nightly
- Decide which security to use on a component-by-component basis

### Team Time Direct Reports



**7** Exceptions

[Blog - No manual maintenance required for manager access to direct reports in PeopleSoft Time and Labor](#)



# Roadmap Time and Labor\*

**Date selection allowed  
on MSS Enter Time  
page**

**Start of month for  
monthly timesheet  
using User Preferences**

**Configurable  
Timesheet Summary  
on Enter Time page**

**Batch process to reset  
TA Status and ECD**

**Absence status on Enter  
Time page**

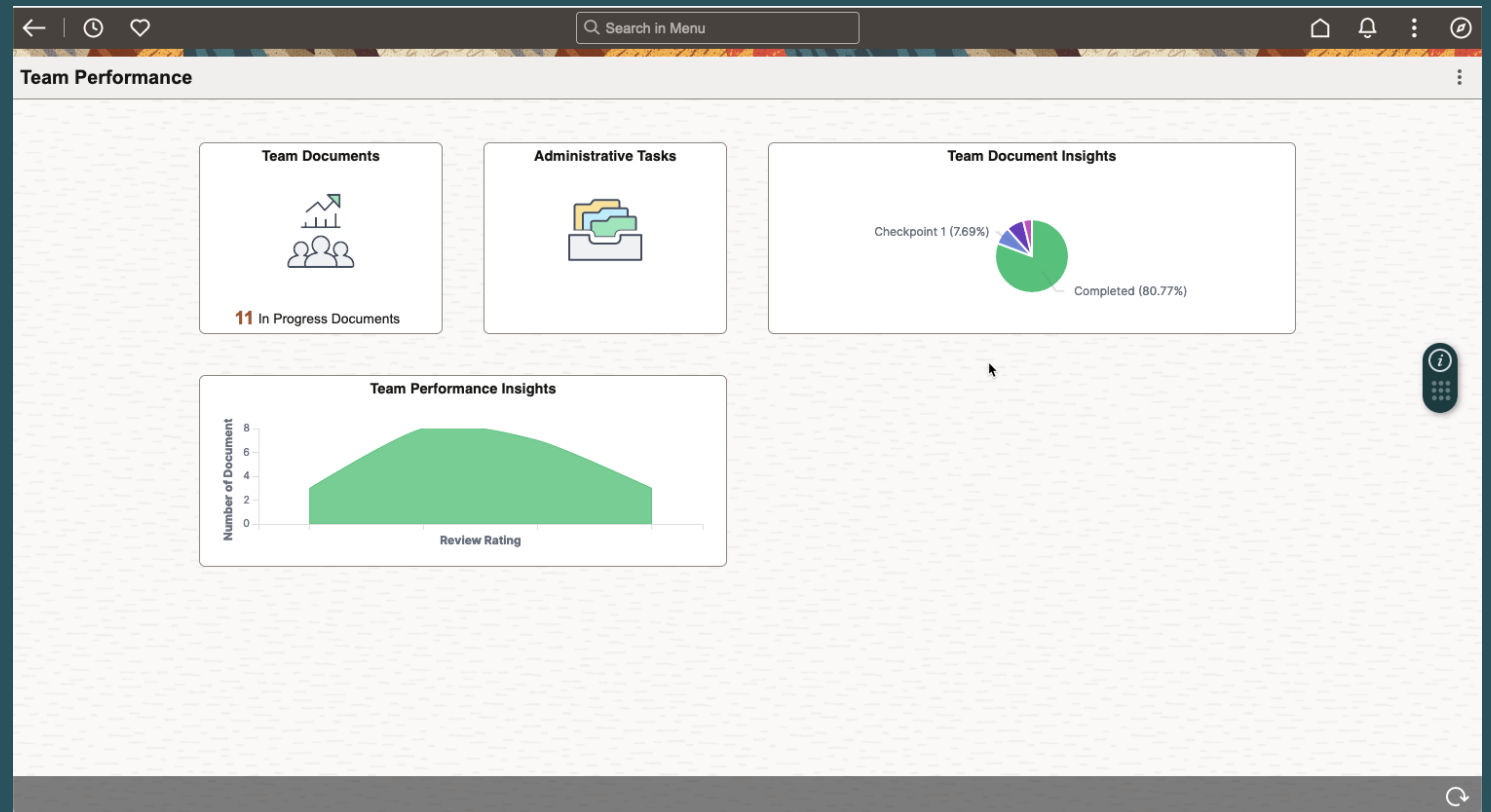
# Performance Management

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# Fluid Performance Management

- New Full Fluid Interface
- Performance Insights
- Ratings anytime during the year
- Easier collaboration and sharing throughout the year
- Star based ratings
- Ability to move ratings and comments from touchpoints to final evaluation
- Anytime Attachments and Fluid Business Objectives \*(Image 47)



# Roadmap Performance Management\*

**Enhanced Fluid Notes**

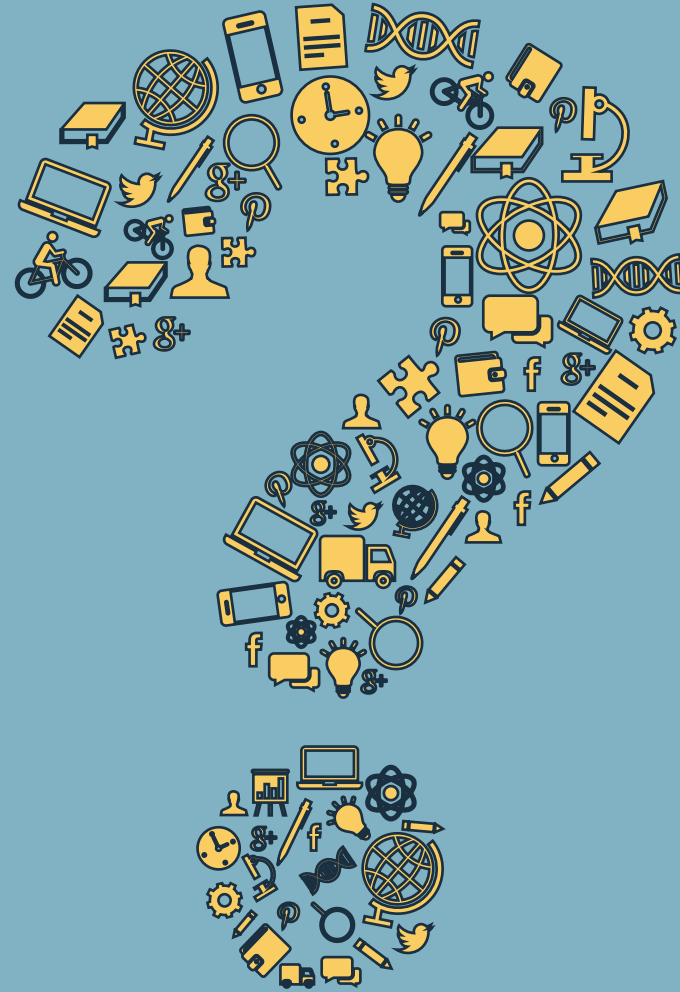
**Integration with  
recognition**

**Enhanced Fluid  
Calibration**

**Employee Recognition \*\***



# Q & A





# Thank You

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