

City of Milwaukee Human Resources Management System (HRMS) - v9.1

On 01.09.17, HRMS (HCM) will be upgraded to **v9.2**. Please note that the URL (*link*) will change (*see page 2*) as well as some of the instructions in this booklet.

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AVAILABILITY OF SELF SERVICE

The system is available from any computer using your favorite Internet browser. The system is available 24/7, **except** for periodic maintenance that occurs usually the 3rd weekend of the month or on the 2nd weekend of the month from 6:00 p.m. Saturday to 6:00 p.m. Sunday.

LOGIN INTO SELF SERVICE

1. To log in, go to the following URL address: milwaukee.gov/selfservice
 - The URL (link) will change as of 01.09.17 to: <https://hrprd.com.mycmsc.com/comhrprd/signon.html>
2. Enter your User ID and password. (User ID: Use **all** 6 digits, including any zeros.)
 - Your User ID is also your **permanent** Employee ID number; sometimes referred to as your "PeopleSoft # or HRMS #.
3. Click the **Sign In** button.
4. **Please set up the "Forgot your password?" function. You only have to do this once.**

LOG OUT OF SELF SERVICE

Always click on **Sign Out** (upper right-hand corner) of self-service when you are finished.

ADDING FAVORITES

If you navigate to certain pages often, click on **Add to Favorites** (top right-side of the screen). You can enter your own description. On the left side of the screen, click on **Favorites**.

PASSWORD GUIDELINES

1. Passwords are set to change every **60** days.
 2. Passwords must be at least **8** characters in length, maximum of 32 characters.
 3. Passwords must contain at least one number (i.e., 0 through 9).
 4. Passwords must begin with an ALPHA character.
 5. Passwords are case sensitive.
 6. When signing on, the password must be entered EXACTLY as you did when you last changed it.
 7. Users must also update your password on your smart phone and mobile device.
- For **login problems**, go to www.milwaukee.gov/RITS.

"FORGOT YOUR PASSWORD?" FEATURE – How to Set It Up

To protect your personal information, do not share your password with anyone!

1. **Path:** Main Menu > My System Profile
2. Click on **Change or set up forgotten password help**.
3. Set up a question as instructed. Click the down arrow to list questions.
4. Type your response to the hint question. Click **OK**.
5. At the bottom of the page, enter the **E-mail address** where a new password should be sent. Check the Primary Email Account box () if there is more than one e-mail address listed. Select the appropriate email type from the list. **Be sure to keep your e-mail address updated!**
6. Click **Save**. You are now set up to have a new password e-mailed to you when you forget your Password.

“FORGOT YOUR PASSWORD?” FEATURE - How to Use It

1. At the login screen, click on “*Forgot your password?*”
2. Enter your User ID and click **Continue**.
3. Enter a response.
4. Click **E-mail New Password**. (Only click once.)
5. Make sure the e-mail ID shown is a valid e-mail address for you.
6. A temporary password will be automatically e-mailed to the address displayed at the top of the page. *This is the primary e-mail address you have on file in self-service. To avoid an incorrect entry, copy and paste the temporary password into the password box.*
7. If you do not remember your password **AND** have not set-up the “*forgot your password?*” function, you must request to have your password **RESET**. To request a “reset” go to www.milwaukee.gov/rits.

PERSONAL INFORMATION

PERSONAL INFORMATION SUMMARY

Path: Main Menu > Self Service > Personal Information > Personal Information Summary

E-MAIL ADDRESSES:

IMPORTANT! THERE ARE 2 AREAS IN SELF-SERVICE WHERE YOU MUST ENTER AN E-MAIL ADDRESS. PLEASE ADD AN E-MAIL ADDRESS TO BOTH!

Path #1: Main Menu > My System Profile

1. Scroll down to the EMAIL section.
2. Select **Type** of email address; enter the new email address. If you have more than one email address listed, check the box of the primary email address. *If you want to enter more than one, click on the plus (+) to the right to create a new row.*
3. Click **Save**.

Path #2: Main Menu > Self Service > Personal Information > Email Addresses

1. Click on **Add Email Address**
2. Select the Email Address “type” by clicking the arrow on the drop-down box.
3. Type the Email Address
4. If you have more than one Email Address, click the check box of the “*preferred*” Address
5. Click the **Save** button. You will see, “*The Save was successful.*”
6. Click the **OK** button.

IMPORTANT! *When you separate from City service (i.e. retirement, resignation, layoff, etc.) you will still have access to self-service. Be sure your primary e-mail address is a “personal” address and not your City email. You must change it before you are off payroll.*

EMERGENCY CONTACT INFORMATION

Path: Main Menu > Self Service > Personal Information > Emergency Contacts

1. Click **Add Emergency Contact**.
2. Enter all emergency contact information.
3. Click **Save**. If successful, you will see a message “*The Save was successful.*”
4. Click **OK**. There is no prompt if not saved. **Do not click BACK before saving.**
5. If changing contact information, click **Edit** on the appropriate line and update as needed. Follow steps 3 and 4 when completed.

HOME/MAILING ADDRESS

Path: Main Menu > Self Service > Personal Information > Home and Mailing Address

1. Click the icon under **Edit** to update an existing address or select an address type and click **Add**.
2. Enter the date this change is effective.
3. Enter the correct address in all the fields. *This also includes the fields City, State, and Postal (zip code). Type names in all CAPITAL LETTERS (do not use punctuation).*
4. Click **Save**. If successful, you will see a message, "The Submit was successful."
5. Click **OK**. There is no prompt if not saved. **Do not click BACK before saving.**
6. Click **Main Menu** or Sign Out if you are done with self-service.
7. Provide your payroll specialist with a completed "**Residence Statement Form**" within 3 days of the move for **all** home address changes. *(The form is available at www.milwaukee.gov/der/forms.)*

NAME CHANGES

Path: Main Menu > Self Service > Personal Information > Name Change

1. It is important to note that all employment information, including employee names, should be entered in all CAPITAL LETTERS.
2. Enter the effective date of the change.
3. Click **Edit Name** and change name. Click **OK**.
4. Click **Submit**. If successful, you will see a message "The Submit was successful." You must submit a copy of your Social Security card to the payroll specialist before this change will be accepted.
5. Click **OK**. There is no prompt if not saved. **Do not click BACK before saving.**
6. Provide your payroll specialist with a **copy** of documentation showing the name change.

PHONE NUMBERS

Path: Main Menu > Self Service > Personal Information > Phone Numbers

1. Click **Add a Phone Number**.
2. Select a phone type and enter the correct phone number.
3. Click **Save**. *If successful, you will see a message "The Save was successful."*
4. Click **OK**. There is no prompt if not saved. **Do not click BACK before saving.**

PAYROLL AND COMPENSATION

PAYCHECK/PAYROLL STUB

Path: Main Menu > Self Service > Payroll and Compensation > View Paycheck

Current paycheck information is available on payday; year-to-date balances start as of 09/15/2011 and going forward. Employees will still have access to self-service after separation from City service (see #4 below).

W-2 / W-2C FORMS

1. **Path to Consent:** Main Menu > Self Service > Payroll and Compensation > W-2/W-2C Consent. *(You only need to consent once.)*
2. To view W-2/W-2C form *(after consenting you may view the form electronically when it becomes available):*
 - **Path:** Main Menu > Self Service > Payroll and Compensation > View W-2/W-2C Forms
3. To view prior the prior tax year W-2/W-2C Form click the "**View a different tax year**" button.
4. **Employees will have access to self-service after separation from City service. PRIOR to separation, be sure your primary e-mail address is changed from your City e-mail address to a personnel address (i.e., yahoo, gmail, hotmail, etc). See page 3 regarding e-mail addresses in self-service.**

BENEFITS and LIFE EVENTS

BENEFITS SUMMARY

Path: Main Menu > Self Service > Benefits > Benefits Summary

- ***Current benefit enrollments are displayed.***

BIRTH or ADOPTION

You must enter Life Event changes **within 30 days** of birth or adoption through self-service.

Path: Main Menu > Self Service > Benefits > Life Events > Birth/Adoption

1. Click on the ***Start*** or begin or continue the life event process.
2. Choose one of the following (Birth ***or*** Adoption). Please review the information regarding the 30 day rule.
3. Click on the ***Next*** button.
4. Enter the date of birth.
5. Click on the ***Submit*** button.
6. Click on the line ***Yes, I want to enter information about my new dependent(s) now.***
7. Click on the ***Add a dependent or beneficiary*** section.
8. For each section enter the requested information (please select “yes” for student, for all dependents except spouse and domestic partner). Click ***Save*** after you completed the information.
9. Click ***OK***. This is your confirmation that the information was saved.
10. Click on ***Return to enrollment dependent/beneficiary summary*** (located at the bottom of the page).
11. Click on ***Return to Life Events (birth/adoption)*** (located at the bottom of the page).
12. Click on the line ***Click here to continue with your life event.***
13. Click ***Next*** when told information was submitted.
14. Click ***Next*** on the Benefits Summary page.
15. Click ***Next*** on the Dependent and Beneficiary Coverage Summary.
16. Click ***Next*** on the W-4 Tax Information page
17. Click ***Next*** on the Direct Deposit page.
18. Click ***Next*** on the Voluntary Deductions page.
19. Click on ***Yes, I'd like to prepare my benefit options now.***
20. Click on the button to ***Prepare my benefit options.***
21. Click on ***Cancel.***
22. Click here to continue with your life event.
23. Click on ***Enroll in Benefits.*** DO NOT CLICK ON ***NEXT.*** This will take you to the Benefits Enrollment Page.
24. Click on the ***Select*** button to the right of your event description - FAMILY STATUS CHANGE. *If not available, please contact Employee Benefits Division at (414) 286-2047.
25. Click on ***Edit*** next to the benefit you are enrolling your dependent(s).
26. Scroll down to the bottom of the page and enroll all eligible dependents (click on the box next to their name).
27. When completed click on ***Store.***
28. Review your selections on the “Benefits Enrollment” page.
29. Click on ***OK.***
30. After enrolling your dependent(s), click on ***Submit.***
31. Be sure to review and **print** your confirmation statement when you have completed your benefit enrollment.
32. **BIRTH:** Submit a **copy** of the Birth Certificate or Child Support Order; **ADOPTION:** Submit a **copy** of Court Adoption or Adoption Agency Placement Letter to:
DER-Employee Benefits Division – City Hall, Room 706, **ATTN:** Medical Benefits.

DENTAL INSURANCE

ONLY available to New Hires eligible for benefits, current employees that became eligible for benefits, and during Open Enrollment.

Path: Main Menu > Self Service > Benefits > Benefits Enrollment

1. Click the **Select** button.
2. Click the **Edit** button to select the Dental Plan Option.
3. Click the Circle button to select a Dental Plan.
4. If you have dependent(s) on your plan or would like to add a dependent, continue and scroll down to the Enroll Your Dependents (Add/Review Dependents). **All dependent names must be CAPITALIZED and check the student box.** The SSN for all dependents will be required.
5. Click the **Store** button for the additional options. The **Store** button will hold your choices until you are ready to submit your final enrollment. Click the **OK** button after you have reviewed the confirmation display page and to store the elections. Do not click the **Submit** button until you have completed all of your options.
6. If there are no additional changes, then click the **Submit** button.
7. Be sure to review and **print** your confirmation statement when you have completed your benefit enrollment.

FLEXIBLE CHOICES PROGRAM (FSA)

ONLY available to New Hires eligible for benefits, current employees that became eligible for benefits, and during Open Enrollment.

- If you wish to participate in any of the three parts of the Flexible Choices Program, you must enroll **every** plan year. **These plans do not automatically renew.**

Path: Main Menu > Self Service > Benefits > Benefits Enrollment

1. Click the **Select** button.
2. Click the **Edit** button to select *Flexible Choices Medical, Dependent Care or Parking Expenses*.
3. Click the **Circle** button to select a Flexible Choices Option or click No, I do not want to enroll.
4. Submit the annual pledge amount for each of the Flexible Choices options you want to be enrolled in.
5. Click the **Store** button, which will hold your choices until you are ready to submit your final enrollment.
6. Click the **OK** button after you have reviewed the confirmation display page and to store the elections. Do **not** click the **Submit** button until you have completed all of your options.
7. If there are no additional changes, then click the **Submit** button.
8. Be sure to review and **print** your confirmation statement when you have completed your benefit enrollment.

HEALTH INSURANCE

ONLY available to New Hires eligible for benefits, current employees that became eligible for benefits, and during Open Enrollment.

Path: Main Menu > Self Service > Benefits > Benefits Enrollment

1. Click the **Select** button.
2. Click the **Edit** button to select the Health Plan Option.
3. Click the **Circle** button to select a Health Plan.
4. If you have dependent(s) on your plan or would like to add a dependent, continue and scroll down to the Enroll Your Dependents (Add/Review Dependents). **All dependent names must be CAPITALIZED and check the student box.** The Social Security Number (SSN) for all dependents will be required.
5. Click the Store button for the additional options. *The store button will hold your choices until you are ready to submit your final enrollment.* Click the **OK** button after you have reviewed the confirmation display page and to store the elections. Do **not** click the **Submit** button until you have completed all of your options, for example, any changes to the dental insurance or flexible choices program.
6. If there are no additional changes, then click the **Submit** button.

7. Be sure to review and **print** your confirmation statement when you have completed your benefit enrollment.

LIFE INSURANCE (VOLUNTARY) – Only available during Open Enrollment

Path: Main Menu > Self Service > Benefits > Benefits Enrollment

1. Click the **Select** button.
2. Click **OK**.
3. Click the **Edit** button to select the Voluntary Group Life option.
4. Click the **Circle** button to select the Voluntary Group Life Plan.
5. Click the **Store** button, which will hold your choices until you are ready to submit your final enrollment.
6. Click the **OK** button after you have reviewed the confirmation display page and to store the elections. Do **not** click the **Submit** button until you have completed all of your options.
7. If there are no additional changes, then click the **Submit** button
8. Be sure to review and **print** your confirmation statement when you have completed your benefit enrollment.

LIFE INSURANCE (FAMILY) – Only available during Open Enrollment

Path: Main Menu > Self Service > Benefits > Benefits Enrollment

1. Click the **Select** button.
2. Click **OK**.
3. Click the **Edit** button to select the Family Life option.
4. Click the **Circle** button to select the Family Life Plan.
5. Click the **Store** button, which will hold your choices until you are ready to submit your final enrollment.
6. Click the **OK** button after you have reviewed the confirmation display page and to store the elections. Do **not** click the **Submit** button until you have completed all of your options.
7. If there are no additional changes, then click the **Submit** button
8. Be sure to review and **print** your confirmation statement when you have completed your benefit enrollment.

LIFE INSURANCE (Entering Beneficiaries) – Only available during Open Enrollment

Path: Main Menu > Self Service > Benefits > Benefits Summary

1. Under “Type of Benefit” click **Life**.
2. Click the **Edit** button at the bottom of the screen.
3. Click **Add a New Beneficiary** if you wish to add someone new to the list.
4. Complete the required fields for Personal Information.
5. Complete the required fields for Status Information.
6. If the address of the beneficiary is different from your own address, click to *uncheck* the box under Address and Telephone next to Same Address as Employee.
7. After you *uncheck* the Same Address as Employee box and **Edit Address** button will appear. Click the **Edit Address** button.
8. Complete the address information and click **OK**.
9. Review the address information. If it is correct click **Save**.
10. Click **OK**.
11. Click **Return to Change Current Beneficiaries and Allocations** (this link is located at the bottom of the page).
12. Click the box to the left of the beneficiary name that you want to keep as a primary or secondary allocation. Add a percentage for this beneficiary under either the New Primary Allocation column or the New Secondary Allocation column. (*Do not enter % signs.*)

- **NOTE:** Existing names may display on this page. These names are health insurance dependents carried over. If you want them to be a life insurance beneficiary you must click the box to the left of the name and add a percentage.

13. Click **Update Totals**. (Note: Totals must equal 100.)
14. Click **Save**.
15. Click **OK**. (Note: Totals will not appear on this screen.)
16. Click **Return to Life Insurance Main** (this link is at the bottom of the page).
17. Click **Return to Employee Benefit Summary**.
18. Click **Life** – Your updated beneficiaries and percentages will not display. This will complete your Life Insurance beneficiary elections.

LONG TERM DISABILITY (LTD)– Only available during Open Enrollment

If you wish to select a Long Term Disability (LTD) buy down of 60, 90, 120 day coverage, or change the current buy down selection.

Path: Main Menu > Self Service > Benefits > Benefits Enrollment

1. Click the **Select** button.
2. Click the **Edit** button to select the LTD Buy Down.
3. Click the Circle button to select the LTD buy down coverage.
4. Click the **Store** button, which will hold your choices until you are ready to submit your final enrollment. Click the **OK** button after you have reviewed the confirmation display page and to store the elections. Do not click the submit button until you have completed all of your options.
5. If there are no additional changes, then click the **Submit** button.
6. Be sure to review and **print** your confirmation statement when you have completed your benefit enrollment.

MARITAL STATUS

You must enter Life Event changes **within 30 days** of marriage (including marriage to another City employee) through self-service.

Path: Main Menu > Self Service > Benefits > Life Events > Marriage

1. Click on the **Start** button to begin or continue the life event process.
2. Enter the date of marriage in the box next to “Date change will take effect”.
3. Click on the **Submit** button.
4. Click on the line **Yes, I want to enter information about my new spouse now**.
5. Click on the **Add a dependent or beneficiary** section.
6. For each section enter the requested information (please select “yes” for student, for all dependents except spouse and domestic partner). Click **Save** after you completed the information.
7. Click **OK**. This is your confirmation that the information was saved.
8. Click on **Return to enrollment dependent/beneficiary summary** (located at the bottom of the page).
9. Click on **Return to Life Events (marriage)** (located at the bottom of the page).
10. Click on the line **Click here to continue with your life event**.
11. Click **OK**, when told information was submitted.
12. Click **Next** on the Marital Status Change page.
13. Click **Next** on the Benefits Summary page.
14. Click **Next** on the Personal Information page.
15. Click **Next** on the W-4 Tax Information page.
16. Click **Next** on the Direct Deposit page.
17. Click **Next** on the Voluntary Deductions page.
18. Click on **Yes, I'd like to prepare my benefit options now**.
19. Click on the button to **Prepare my benefit options**.

20. Click on **Cancel**.
21. Click here to continue with your life event.
 - Click on **Enroll in Benefits**. DO NOT CLICK ON NEXT. (*This will take you to the Benefits Enrollment Page.*)
22. Click on the **Select** button to the right of your event description **FAMILY STATUS CHANGE**. *If not available, please contact Employee Benefits Division at (414) 286-2047.
23. Click on **EDIT** next to the benefit you are enrolling your dependent(s).
24. Scroll down to the bottom of the page and enroll all eligible dependents (*click on the box next to their name*).
25. When completed click on **Store**.
26. Review your selections on the “Benefits Enrollment” page.
27. Click on **OK**.
28. After enrolling your dependent(s), click on **Submit**.
29. Be sure to review and **print** your confirmation statement when you have completed your benefit enrollment.
30. Submit a **copy** of the marriage certificate to DER-Employee Benefits Division – City Hall, Room 706.

TUITION REIMBURSEMENT APPLICATION

For the **step-by-step** instructions, Administrative Guidelines and the amounts summary go to: www.milwaukee.gov/der/TuitionBenefit **OR** www.milwaukee.gov/der/SelfService to download the 6-page document.

POLICIES AND GUIDELINES

REVIEW CITY POLICIES AND GUIDELINES

Path: Main Menu > Self Service > Policy Review

Review and acknowledge City of Milwaukee policies and guidelines specific to your department as well as to general City employees. *Follow instructions at top of Policy Review page.*

PERFORMANCE MANAGEMENT

VIEW YOUR IN-HOUSE TRAINING HISTORY (1996-present)

Path: Main Menu > Self Service > Learning & Development > Training Summary

- You will see a list of in-house courses you completed and are enrolled in (2010 – present). (*Only for courses listed in Employee Relations’ Bulletin of Courses.*) The 2nd list shows in-house courses taken as well as tuition reimbursement courses (1996 – 2009).

PRINT YOUR IN-HOUSE TRAINING HISTORY (1996-present)

Path: Main Menu > Self Service > Performance Management > Employee Summary Report

- Scroll to **Training Summary**, click the download icon .

ADDING PROFESSIONAL TRAINING COURSES TO YOUR HISTORY

Path: Main Menu > Self Service > Learning & Development > Professional Training

At the bottom of the page, click on the button, **Add a Professional Training Course**, fill in the boxes and click the **Save** button.

ADDING POST-SECONDARY SCHOOL DEGREES TO YOUR PROFILE

Use this component to indicate your post-secondary school degrees including Associate, Baccalaureate, Master or other higher level degrees. This component should also be used to indicate any professional-level Certifications held that were received from an accredited college.

Path: Main Menu > Self Service > Learning and Development > My Current Profile

1. Under the **Qualifications** tab, click on the plus sign next to **Add New Degrees** or click on **Add New Degrees**.
2. Type the date the Degree or Professional-Level Certification was acquired (*month/day/year*) or click on the “choose a date” icon to the right of the box. *If you do not know the exact date, an estimate will suffice.*
3. Choose the type of Degree by clicking on the “look up the Degree” icon to the right of the box. Scroll through the list and click on your Degree. **Do not manually type in a Degree** or you will receive an error message when you click the **Save** button.
 - **NOTE:** If the type of degree you acquired is not listed, please send an e-mail to jkamme@milwaukee.gov and request to have a Degree or Professional-Level Certification added to self service.
4. The “Country” and “State” are defaulted to USA and Wisconsin. If your Degree or Professional-Level Certification was acquired elsewhere, click on the icon to the right of each box and select the correct location.
5. School Description box: Enter the name of the School.
6. Major Description box: Enter the name of the Major or name of the Professional-Level Certification.
7. Click the “graduated” box to insert a check mark.
8. **Year Acquired** box: Enter the year (*use 4 digits*).
9. Review your entries for accuracy. If you have another Degree or Professional-Level Certification to add, click the **Apply and Add Another** button. If you have nothing else to add, click the **OK** button.

ADDING HONORS AND AWARDS

This component is **only** to be used by Milwaukee Police Department (MPD) personnel.

1. When done, repeat steps 1 through 3, then set the Firewall back to ON