PowerSchool | Professional Services

eFinancePlus Employee Access Center End User Supplement

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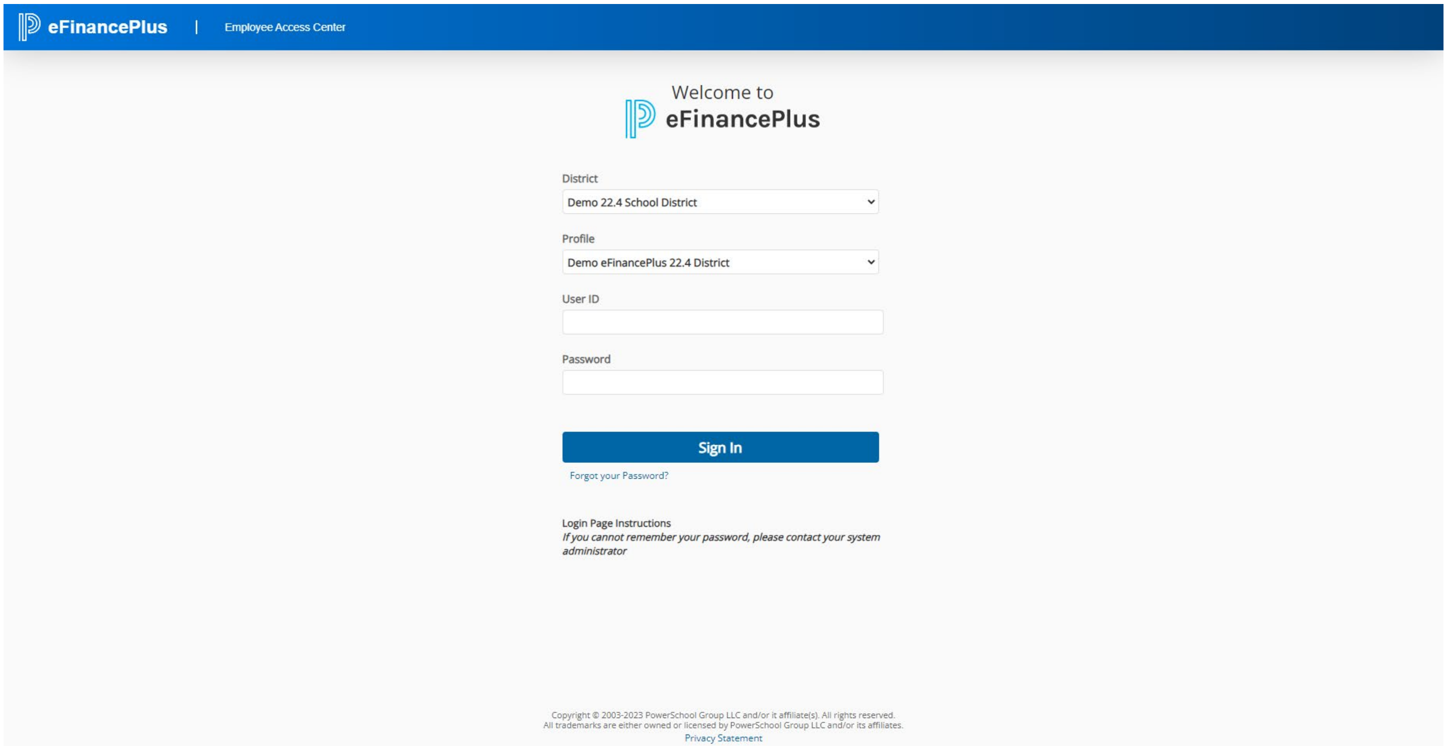
Employee Access Center Overview

Employee Access Center provides employees with access to their payroll and personnel information anytime, anywhere through this convenient web portal. The Employee Access Center portal allows district employees to view demographics, benefit statements, benefit enrollment, attendance history, deduction/benefit history, payroll checks, certifications, and skills. Employee Access Center gives employees the opportunity to update specific personal information and route those changes to appropriate personnel for review and approval. Depending on how the District has configured the Employee Access Center environment, the areas that are available via Employee Access Center include:

- Personal Information
- Salary and Benefits
- Leave Information
- Expense
- Links

Logging Into Employee Access Center

Your eFinancePlus administrator will provide you with a link to your Districts Employee Access Center Web Portal

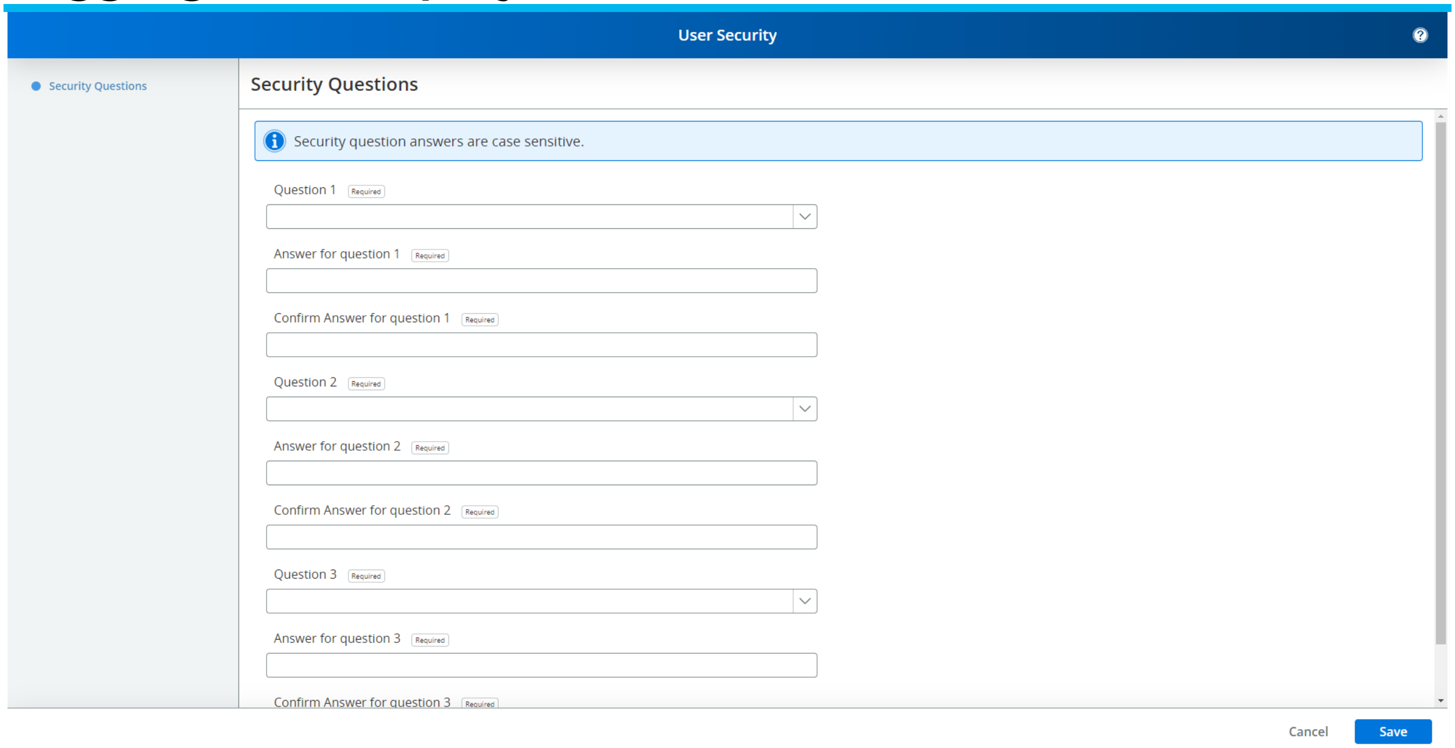


First Time Logins

If you are logging in to EAC for the first time, complete these additional steps:

1. You will be automatically directed to the page to reset your password from the assigned default (last four digits of SSN). Then, enter your new password and click Submit.
2. After selecting a new password, you will be directed to the page to choose security questions to retrieve forgotten passwords. First, you must select three from the predefined list of 10. Then, choose the questions and enter the answers in the Answer and Re-Type Answer text boxes. Click Save when done.

Logging Into Employee Access Center



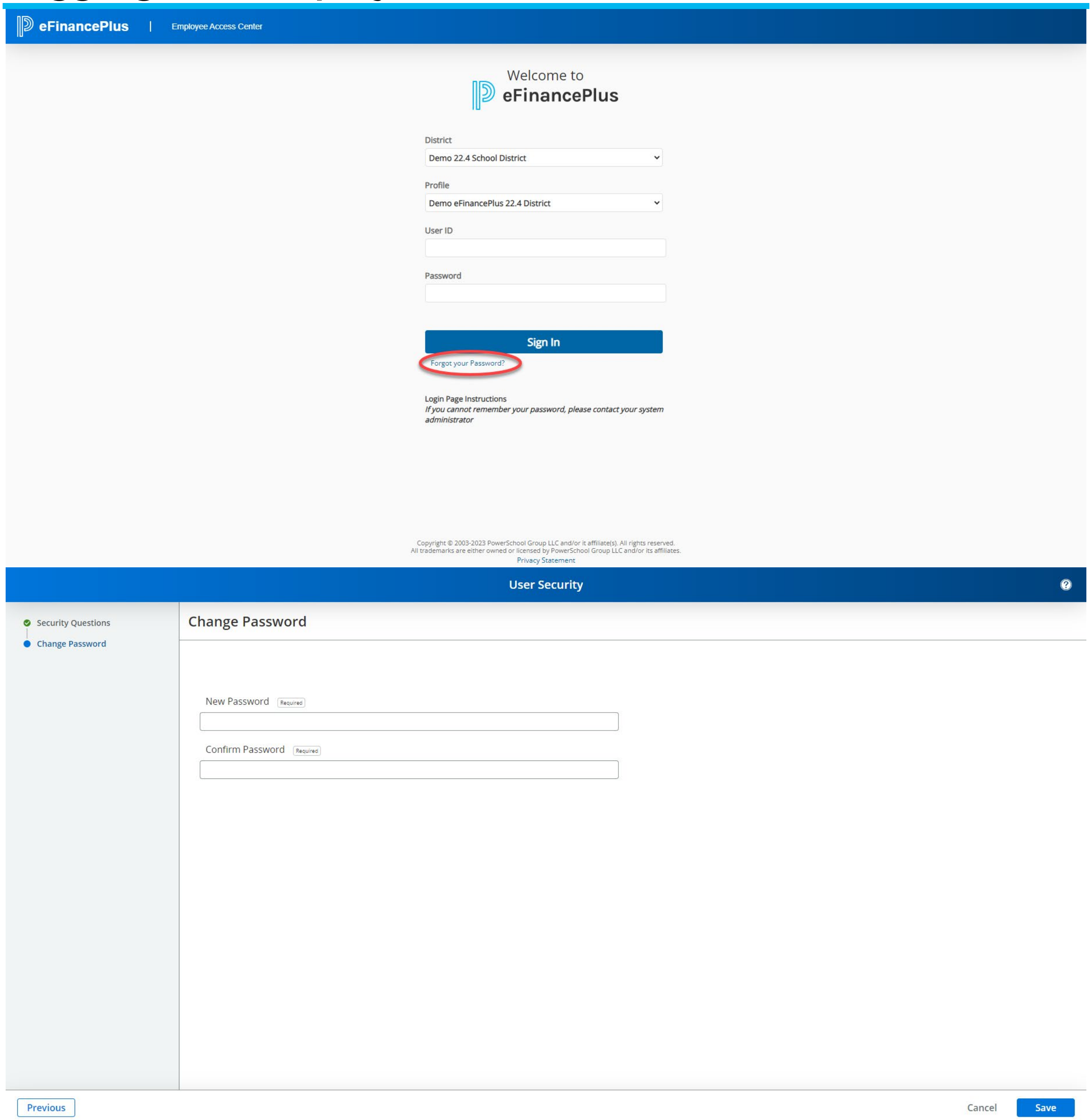
If your organization uses Active Directory, complete these additional steps to link your account to Active Directory:

1. Under the Employee Tasks menu, click the Active Directory Account Link.
2. Your Active Directory link is set up by your organization and is unique.
3. Enter your Active Directory username and password.
4. Click the Link AD Account button. You will receive a message indicating your account has been successfully linked.

Reset your Password

1. On the Login page, click the Forgot your Password link to display the Forgotten Password page.
2. Enter your EAC Email Address, User ID, and Social Security Number, and then click Submit.
3. An email with a link will be sent to you. This link is time-sensitive; once it has expired, request a new link if needed.
4. Click the link to view EAC's Login page.
5. On the Change Password page, enter your new password.
6. Click Reset Password to reset your password and access EAC.

Logging Into Employee Access Center



Personal Information Menu

Once logged in, the Demographic Information Page of the Personal Information Menu is Displayed. Personal Information is where employees can review and make adjustments to specific fields in their Demographic Information, Certifications and Skills/Interests, Education, and Professional Development.

Demographic Information

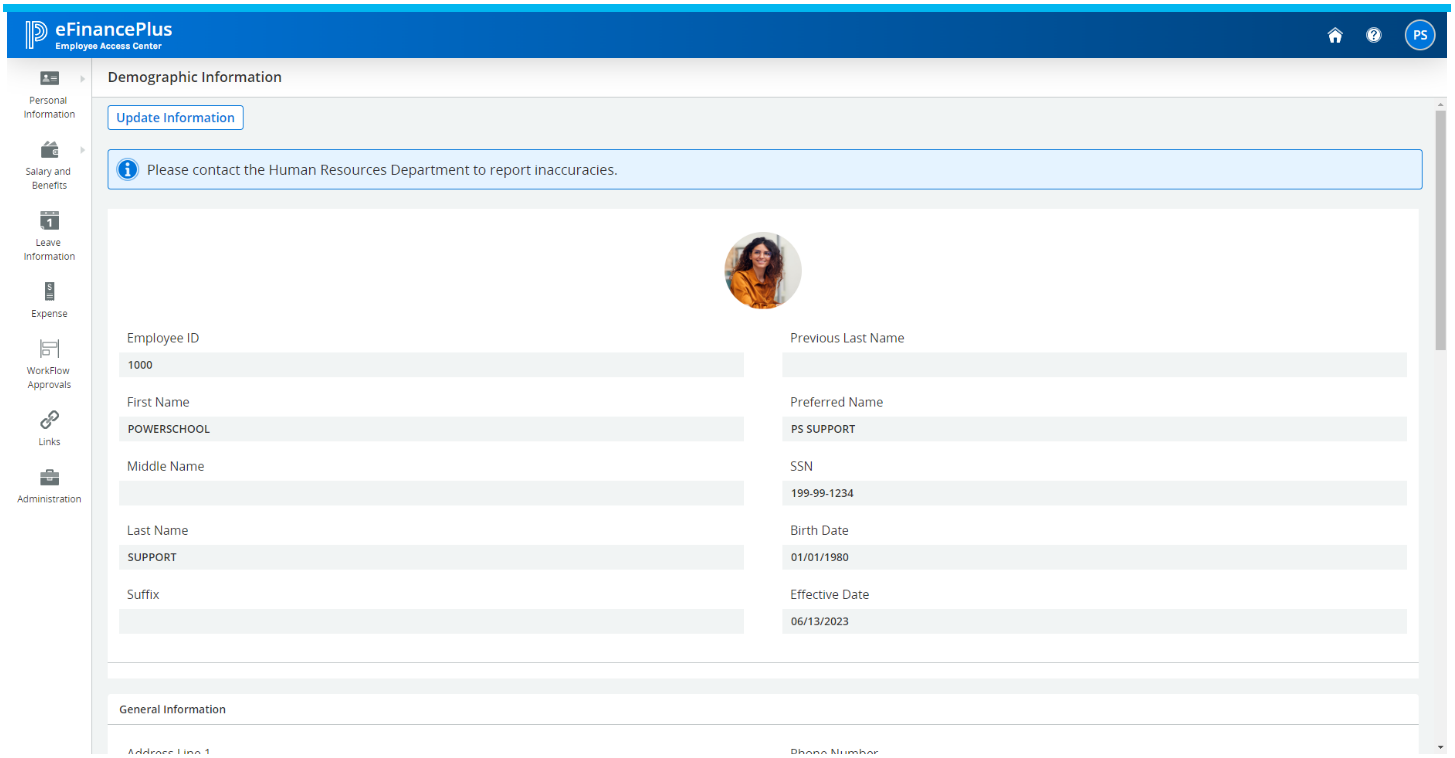
Use the Demographic Information page to view and update your employee information. The page display depends on the software version used.

Information on this page is retrieved from your personnel record in Human Resources. Depending upon District settings, certain fields can be edited within the Demographic Information screen. Some edits may need to be approved before they are applied to your employee record.

Fields found on the Demographic Information Page are:

Employee ID	Previous Last Name
First Name	Preferred Name
Middle Name	SSN
Last Name	Birth Date
Suffix	Effective Date
Address Line 1	Phone Number
Address Line 2	Work Phone
City	Cell Phone
State	Other Phone
Zip	Personal Email
Hire Date	Check Location
Department	Work Email
Staff State ID	
Emergency Contact	Physician
Emergency Phone	Physician Phone
Emergency Cell Phone	
Spouse Name	Privacy Settings
Spouse Phone	

Personal Information Menu



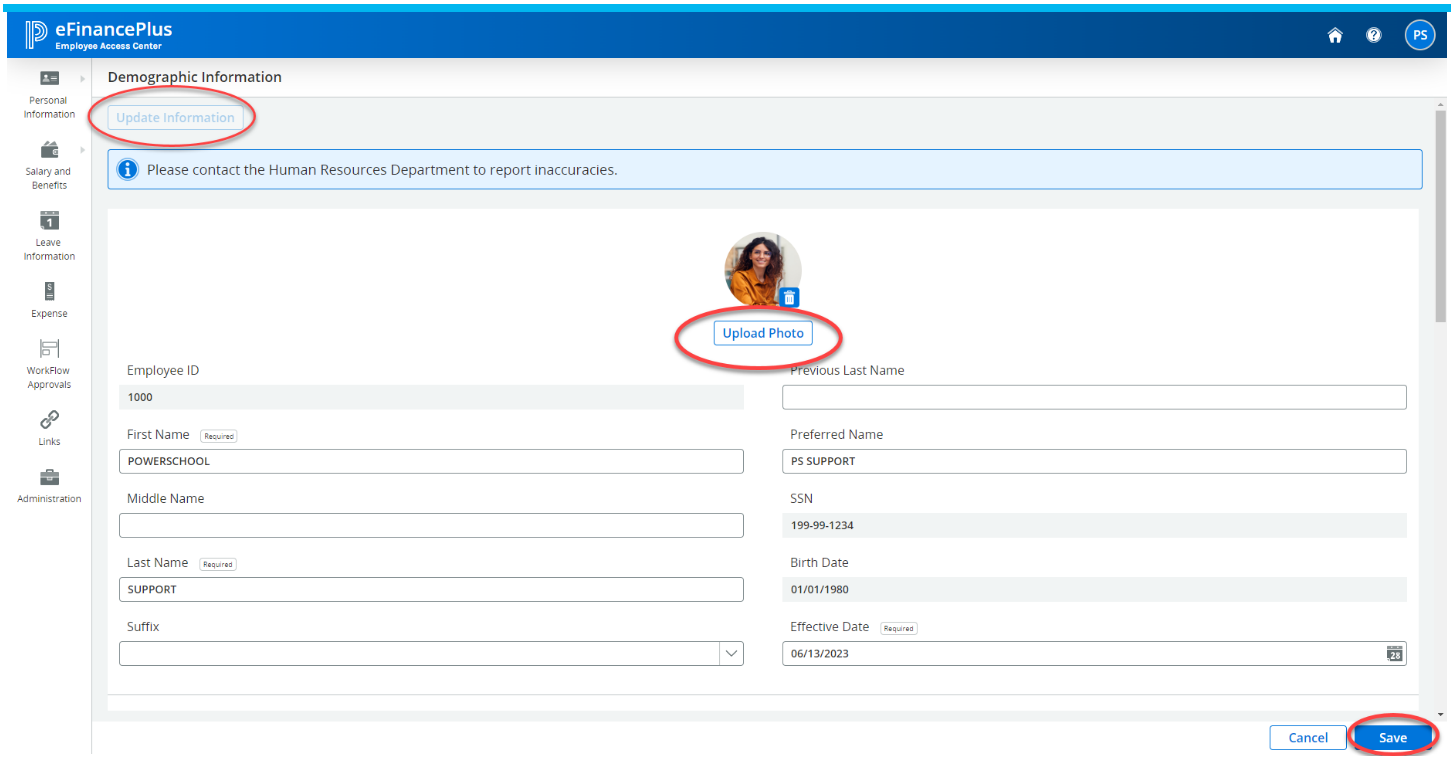
Update Information

1. From the Personal Information menu, click Demographic Information.
2. Click Update Information.
3. Update the fields as necessary.
4. Click Save.

   If your system administrator allows, you can upload a photo that will appear on the Demographic Information page.

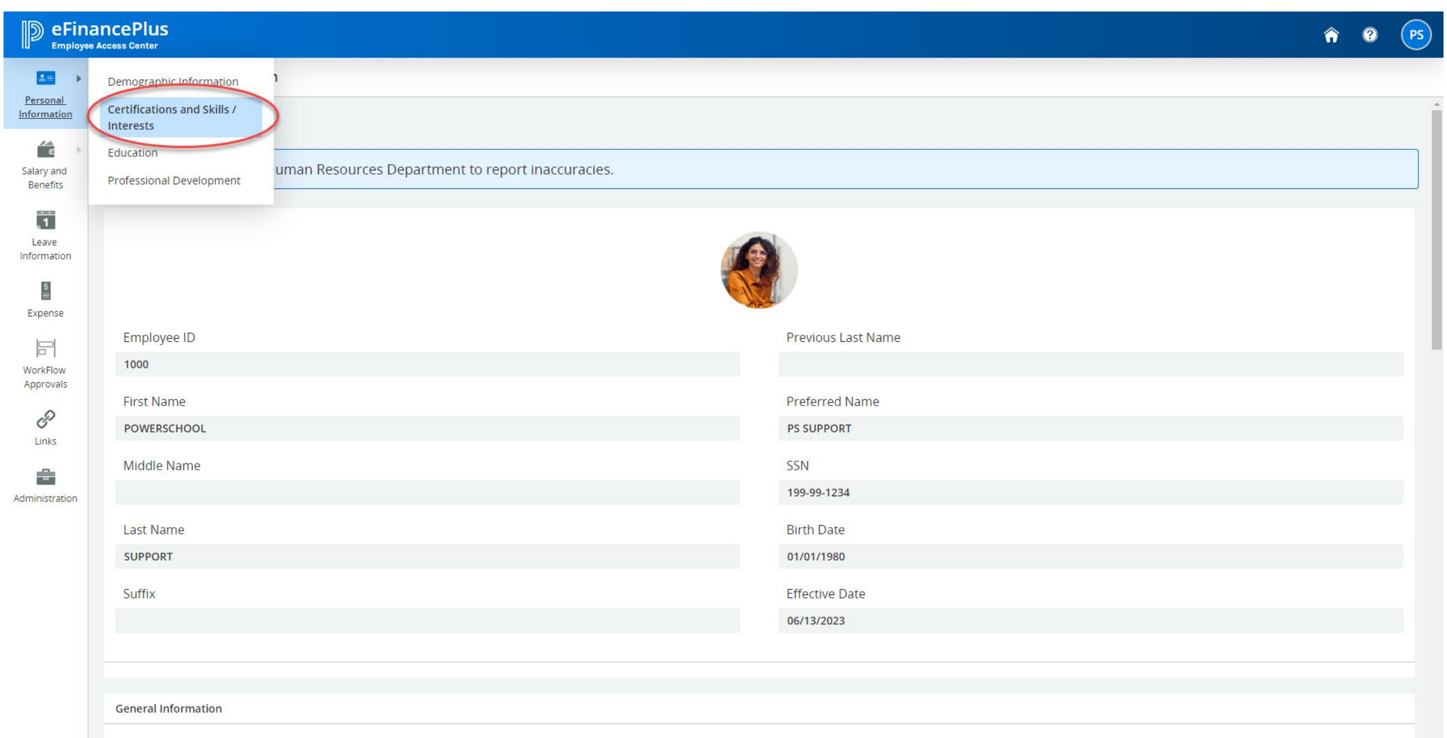
1. From the Personal Information menu, click Demographic Information.
2. Click Update Information.
3. Click Upload Photo.
4. Select a photo that meets the requirements. (Supported file formats are .jpeg, .jpg, .png, and .gif. The maximum size limit is 2 MB. The maximum resolution is 300 x 300.)
5. Click Save.

Personal Information Menu



Certifications and Skills/Interests

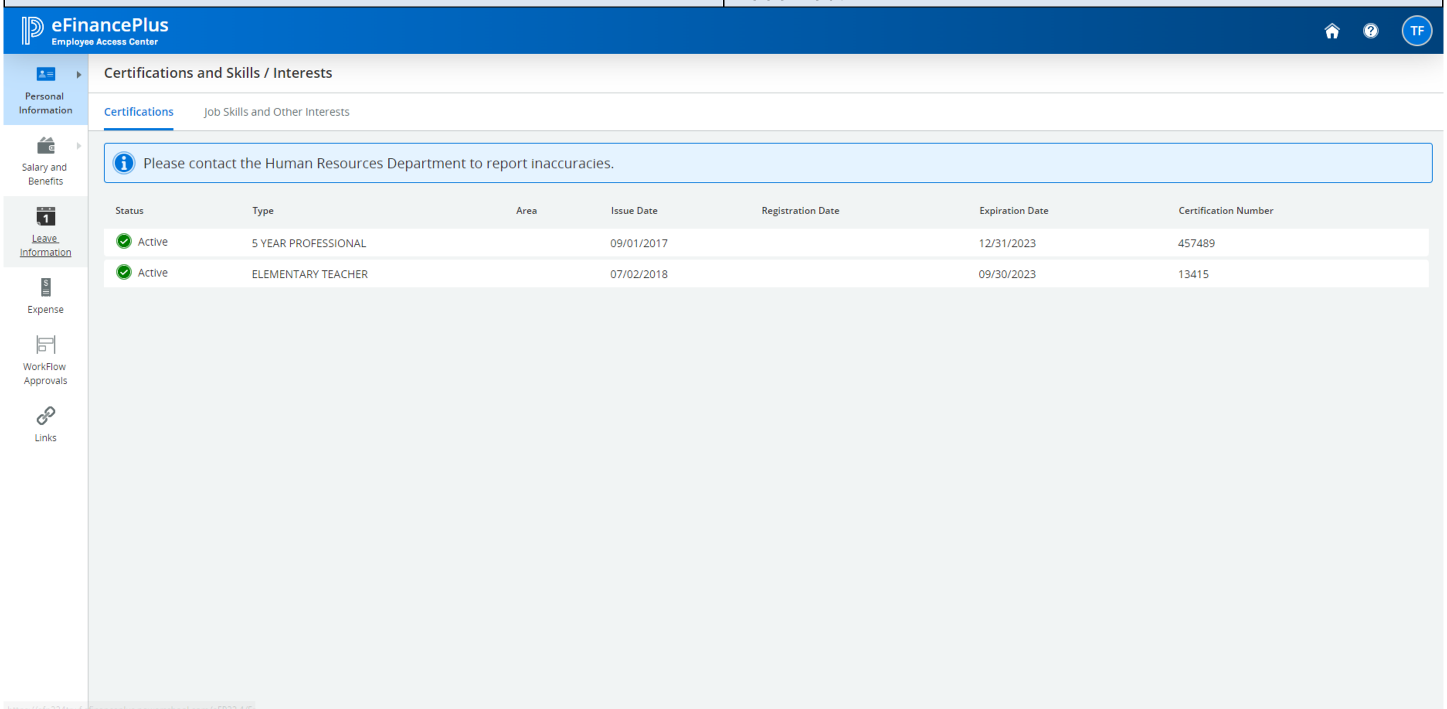
Use the Certifications and Skills/Interests page to review your employment qualifications in the Human Resources database. Select the Personal Information Menu, and then choose the Certifications and Skills/Interests item to open the page.



This page can display any or all of the following sections:

Personal Information Menu

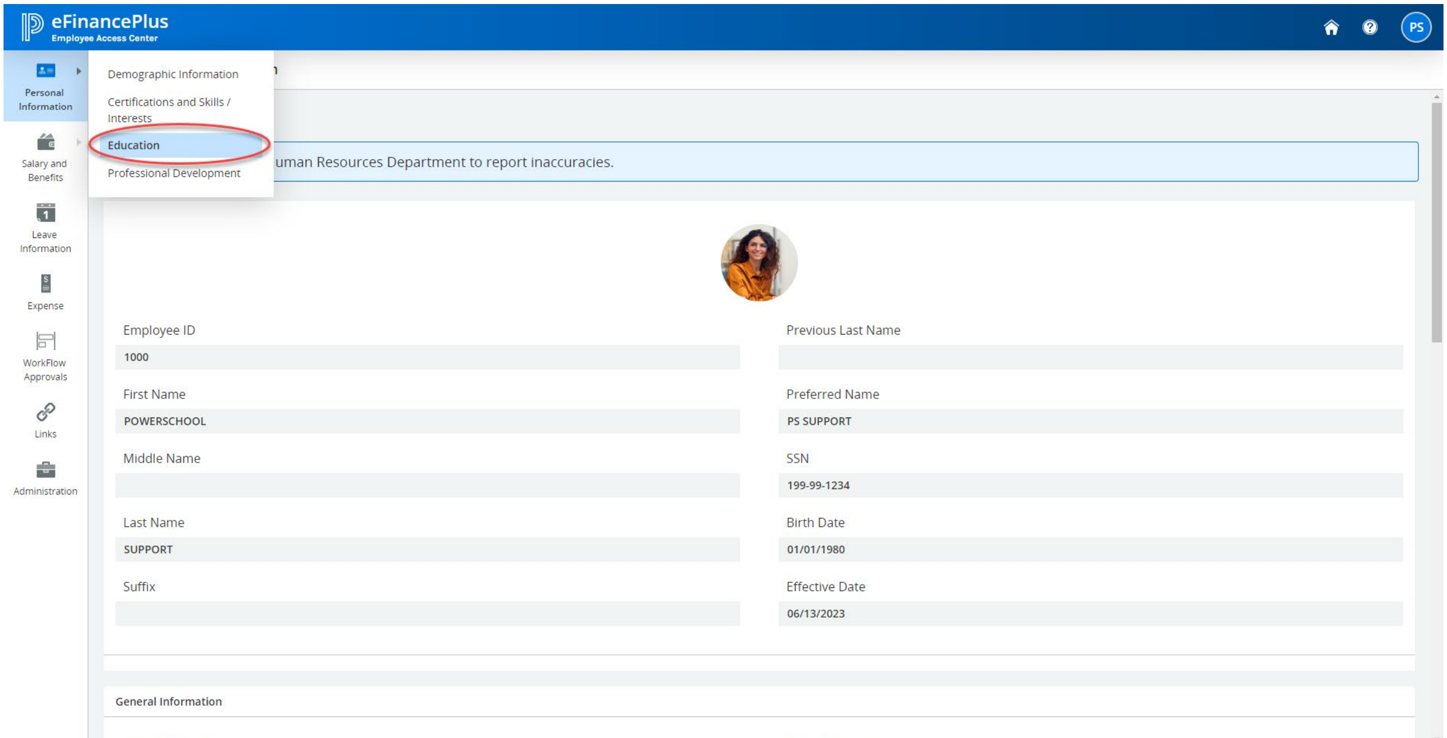
Job Skills Section	This section is divided into two listings depending on how this information is defined in the Human Resources system. Usually, the first column lists your special job skills, and the second column lists your professional interests.
Certifications Section	Displays relevant job-related accreditations you have received.

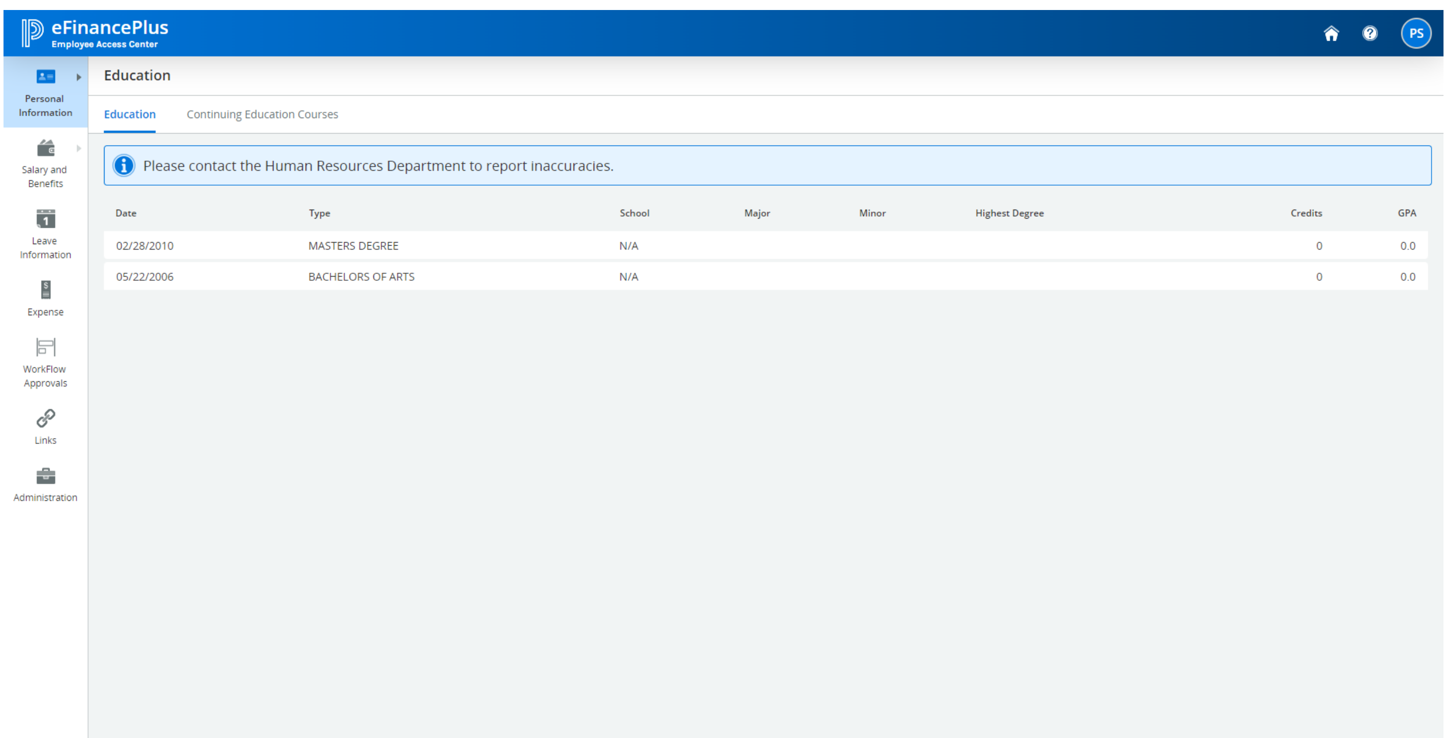


Personal Information Menu

Education

Use the Education page to review your Degree and Continuing Education information in the Human Resources database. Select the Personal Information Menu, and then choose the Education item to open the page.

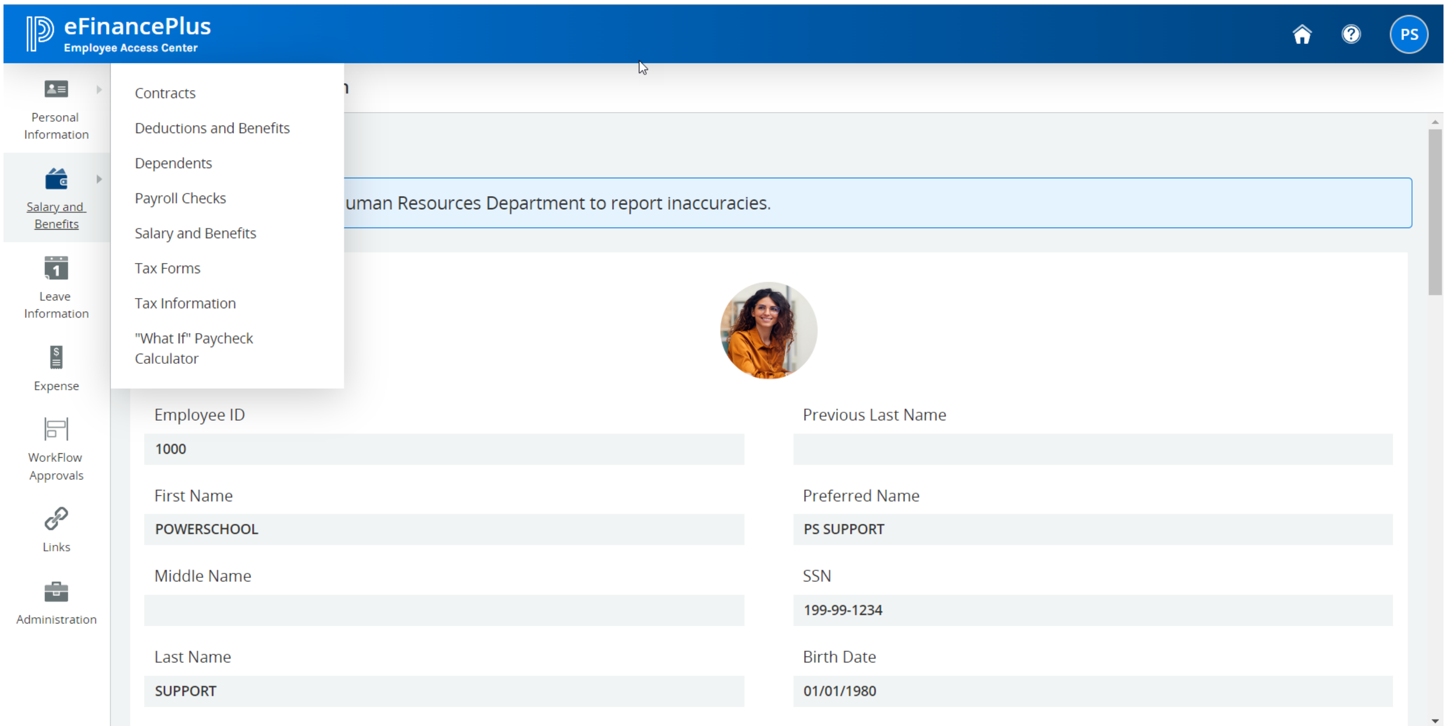




Salary and Benefits

Salary and Benefits

Use the Salary and Benefits menu to view current salary, deduction and benefit information. Paycheck and Tax Form History can also be accessed. Update Tax Information from this Menu. If configured, Contracts can be reviewed and digitally signed, as well as accessed for historical contracts. Add and edit Dependent Information. The “What If” Paycheck calculator can also be used to test how different pay and deduction changes would affect future paychecks.



Contracts

Use the Contracts page to review and sign your contracts. To generate a PDF of the contract, click the Description link.

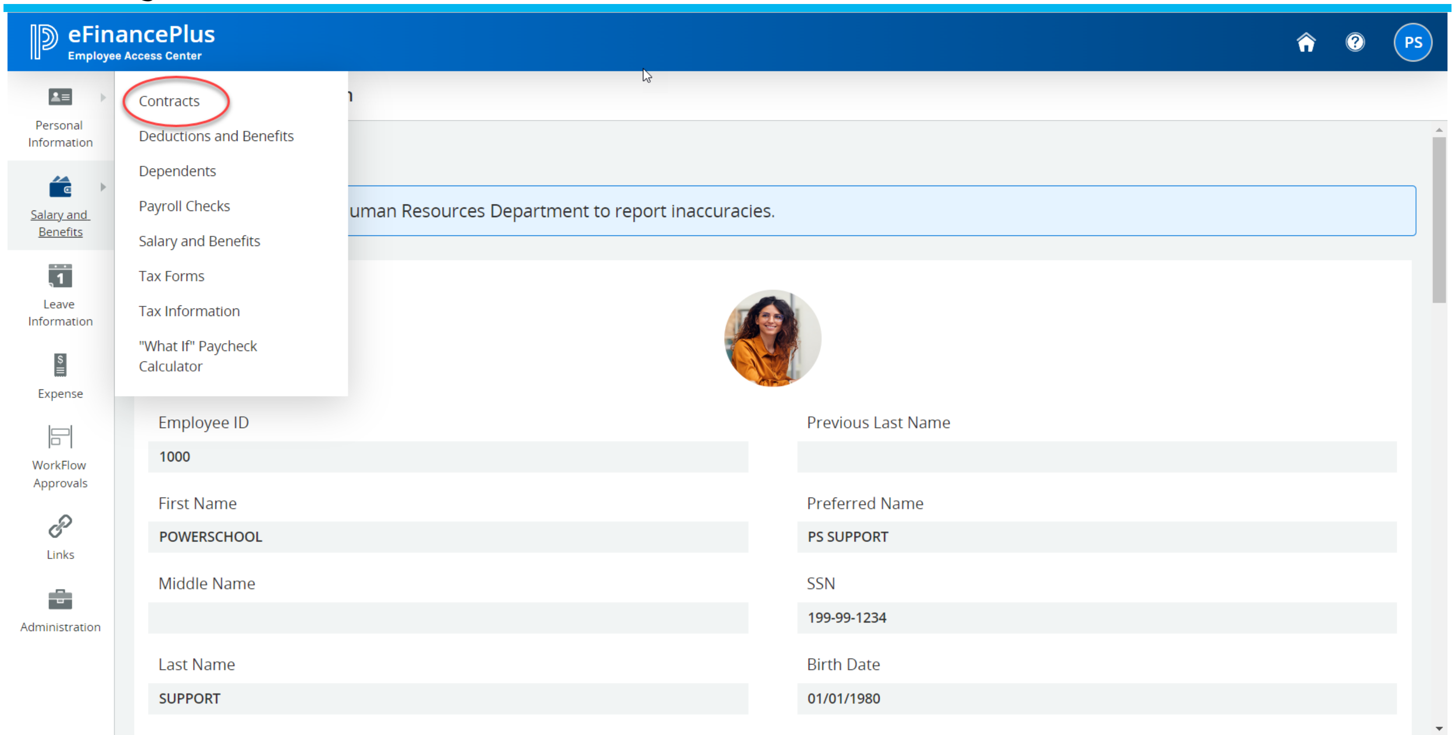
Signing a contract on this page constitutes your acceptance of the contract's terms and creates an electronic signature that is considered legal and binding.

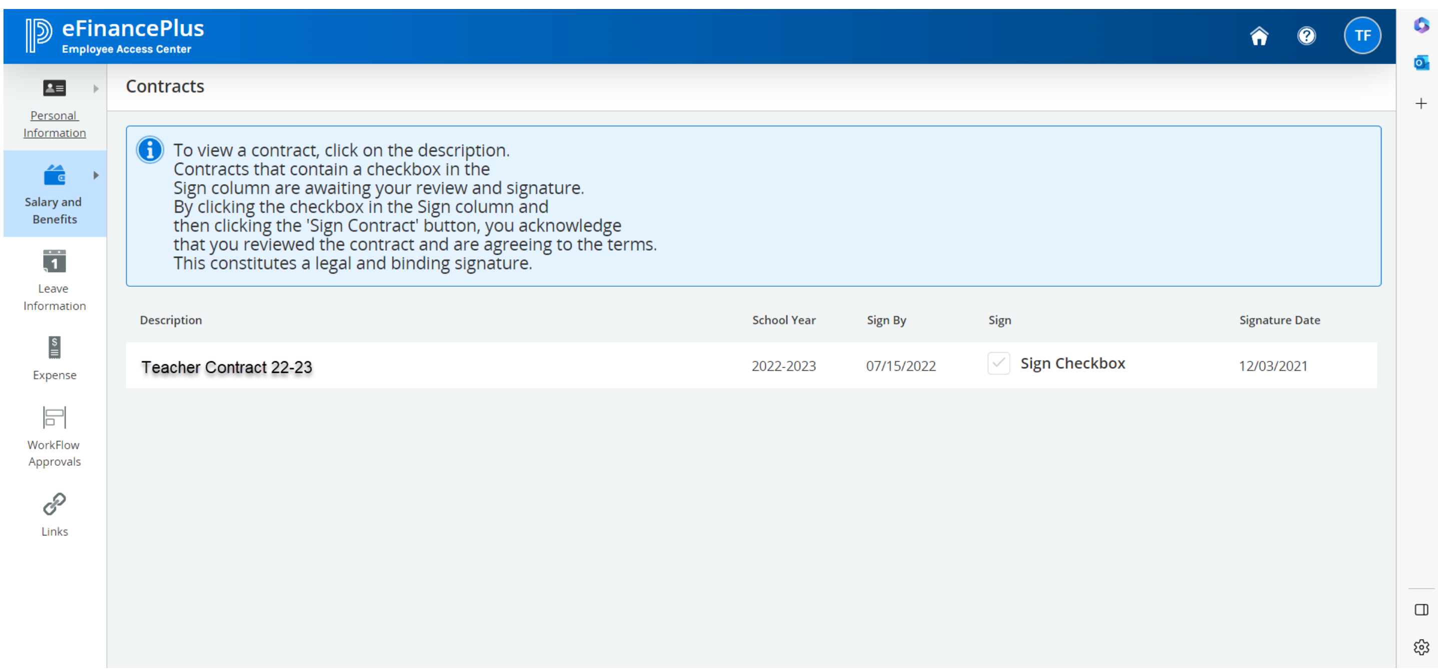
From the Salary and Benefits menu, select Contracts. Depending on the version of Employee Access Center (EAC) used by your organization, there may be a Contracts option in the main menu.

Sign Contracts

1. In the List section, select the Sign option for the desired contract.
    a. If the Sign checkbox does not appear, this indicates the contract has already been signed or has expired.
2. Click Sign Contract.

Salary and Benefits





Deductions and Benefits

The Deductions and Benefits Information page displays a list of current benefits and deductions, which you can manage depending on the settings maintained by the organization. For example, some deductions may be limited to an annual enrollment period; others you can update at any time. For details on benefit enrollment processes, refer to Enrollment. Your Human Resources (HR) department authorizes and posts the updates to finalize them.

Depending on your organization's policies, submit change requests to manage dependent or direct deposit information.

Salary and Benefits

If you cannot update your enrollment information through the Deductions and Benefits Detail page, reviewing financial information for specific deductions and benefits is still important.

The page display and functions depend on the type of deduction or benefit you selected and the Employee Access Center (EAC) setup:

- Extra fields display on the detail page for deductions with a direct deposit bank transaction.
- Your assigned beneficiaries appear in the Beneficiaries section for deductions with associated beneficiaries. This section is only available if your organization allows updates at any time.
- For deductions with several plan options, the Status field displays if you can update your plan selection. You can select a new plan during your annual benefits enrollment period.
- For deductions with associated dependents, your assigned dependents display in the Include Dependents section. This section is only available if your employer allows updates at any time. Click Update Dependents to add or manage dependents.
- You must assign the amount or percentage to deduct from your pay for some deductions. If your employer allows updates at any time, update the Employee Paid and Status fields for these deductions.

Managing Deductions and Benefits

Depending on the software version and system administrator settings, you can manage Direct Deposit deductions and dependents on the Deductions and Benefits page. From the Salary and Benefits menu, select Deductions and Benefits.

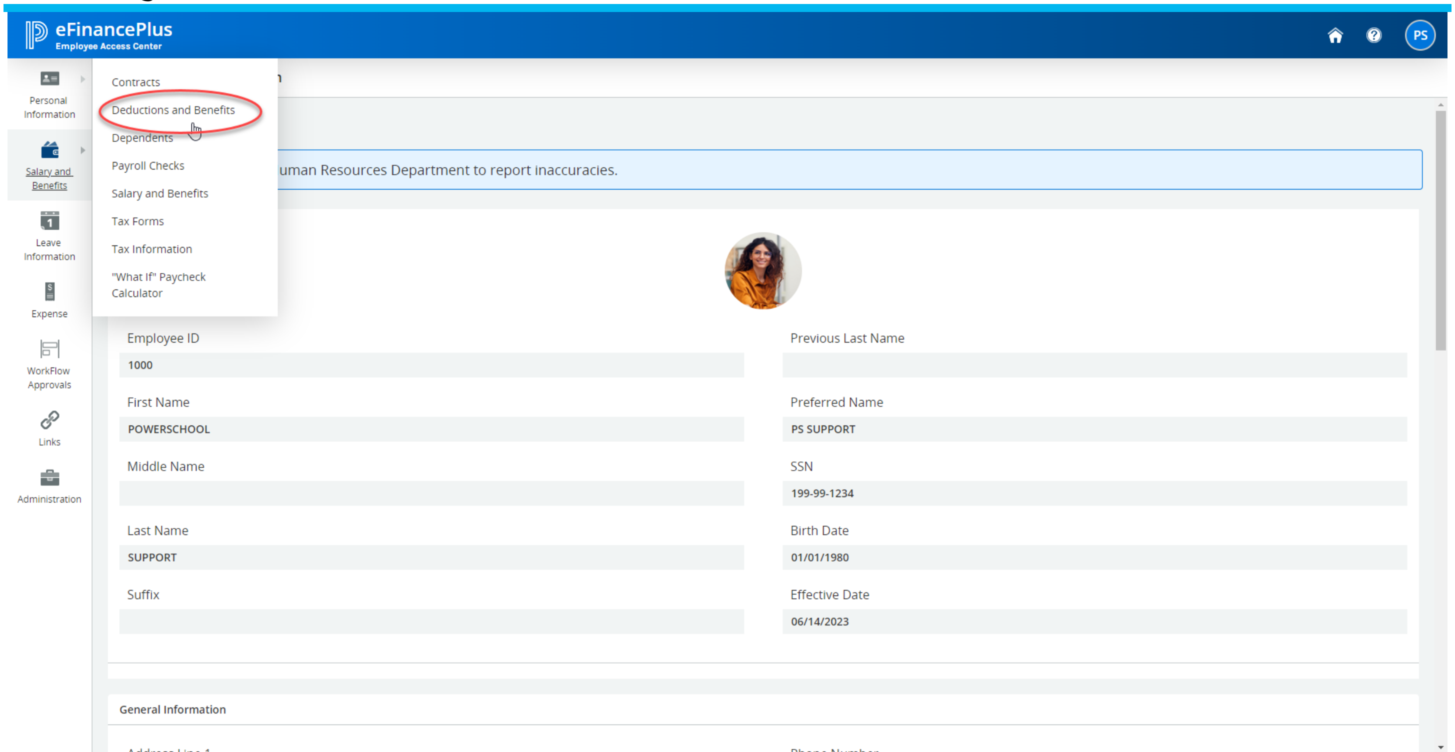
To add or edit a Direct Deposit:

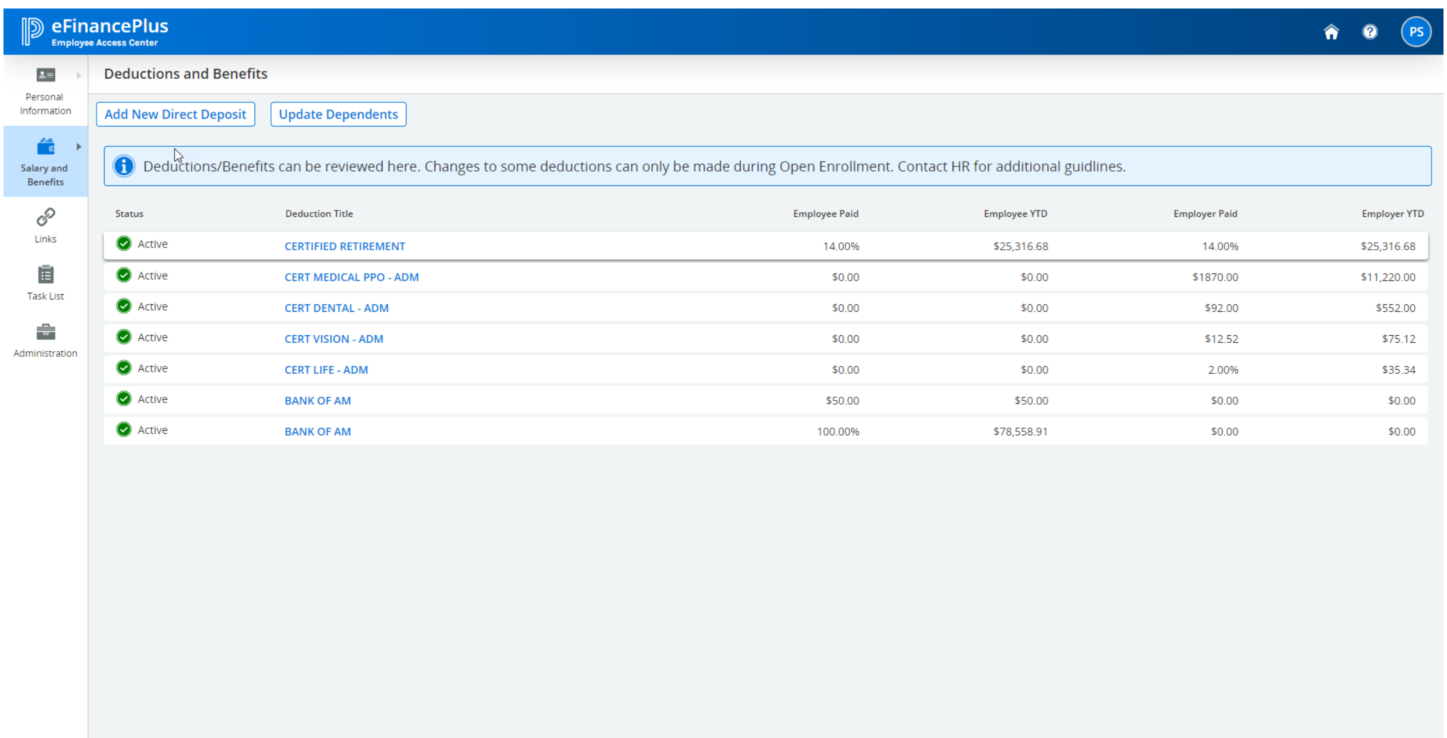
1. Do one of the following:
    a. To add, click Add New Direct Deposit.
    b. To update, click the name of the direct deposit deduction.
2. Complete or update the fields. You can set up multiple direct deposit records. The remainder is issued as a paycheck if direct deposit deductions do not meet your total net pay.
    a. Enter your bank's name manually if the routing number does not populate the Bank Name field.
3. Depending on the software version and system administrator settings, you can upload an attachment, such as a voided check to support your direct deposit deduction. Supported file formats are .bmp, .doc, .docx, .gif, .jpg, .jpeg, .pdf, .png, .ppt, .pptx, .rtf, .txt, .xml, .xls, .xlsx, or .tiff. The maximum size limit is 2 MB.
    a. Click Upload Attachments.
    b. Select an attachment to upload.
    c. After you open the file, a default filename displays. Click X if you want to remove the attachment and replace it.
4. Do one of the following:
    a. To add, click Add to create a new direct deposit.
    b. To update, click Save.

To add or edit a Dependent:

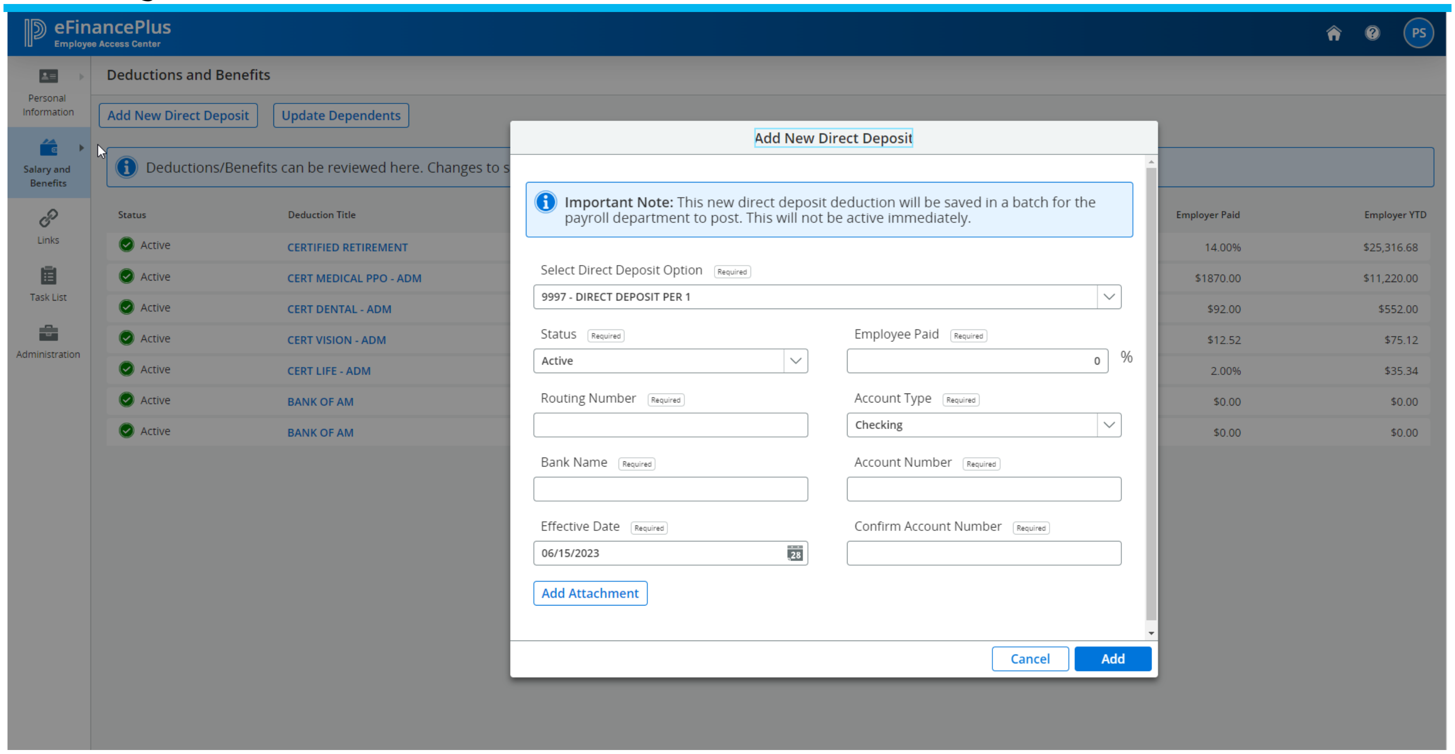
1. Select Update Dependents.
2. Do one of the following:
    a. To add, click Add New Dependent.
    b. To update, click the dependent's name.
3. Complete or update the fields.
4. Do one of the following:
    a. To add, click Add to create a new dependent record.
    b. To update, click Save.

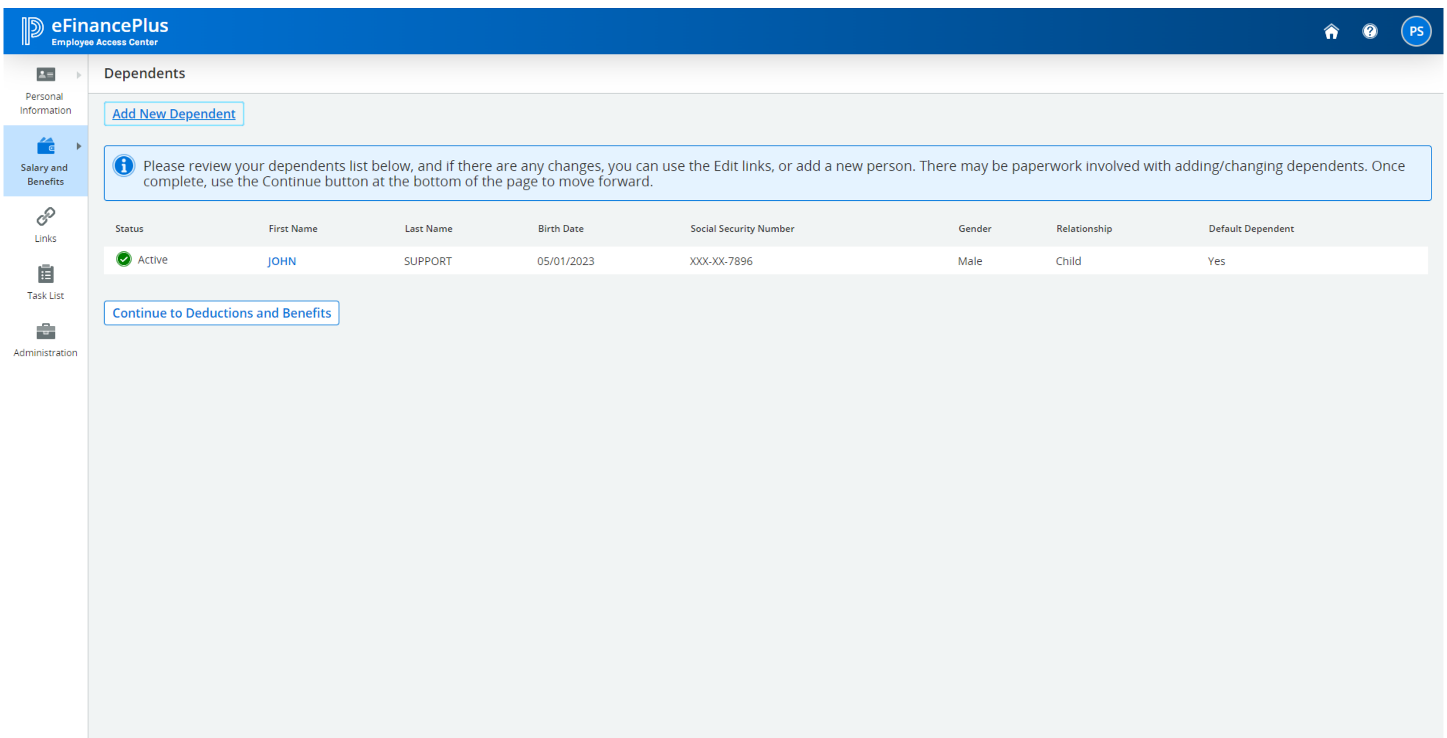
Salary and Benefits



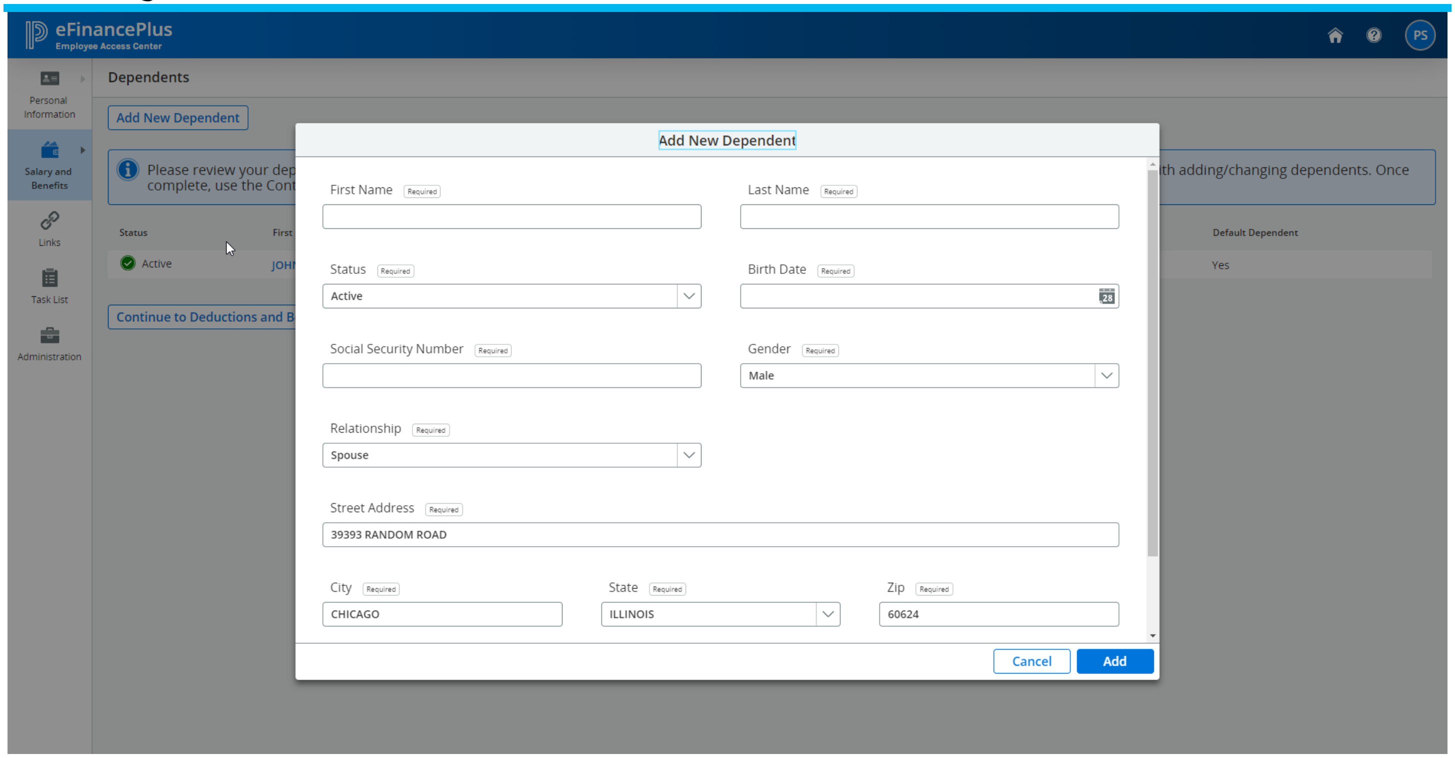


Salary and Benefits





Salary and Benefits



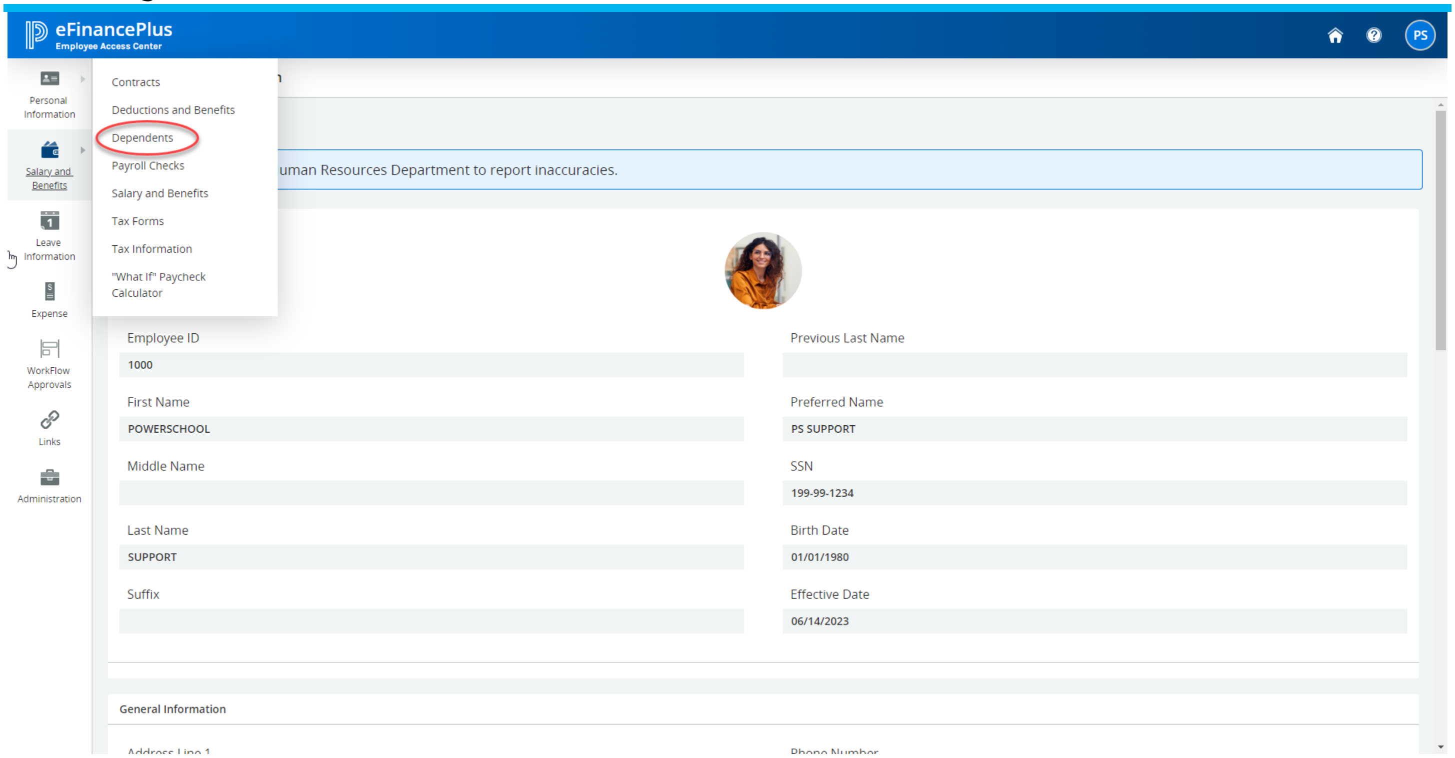
Dependents

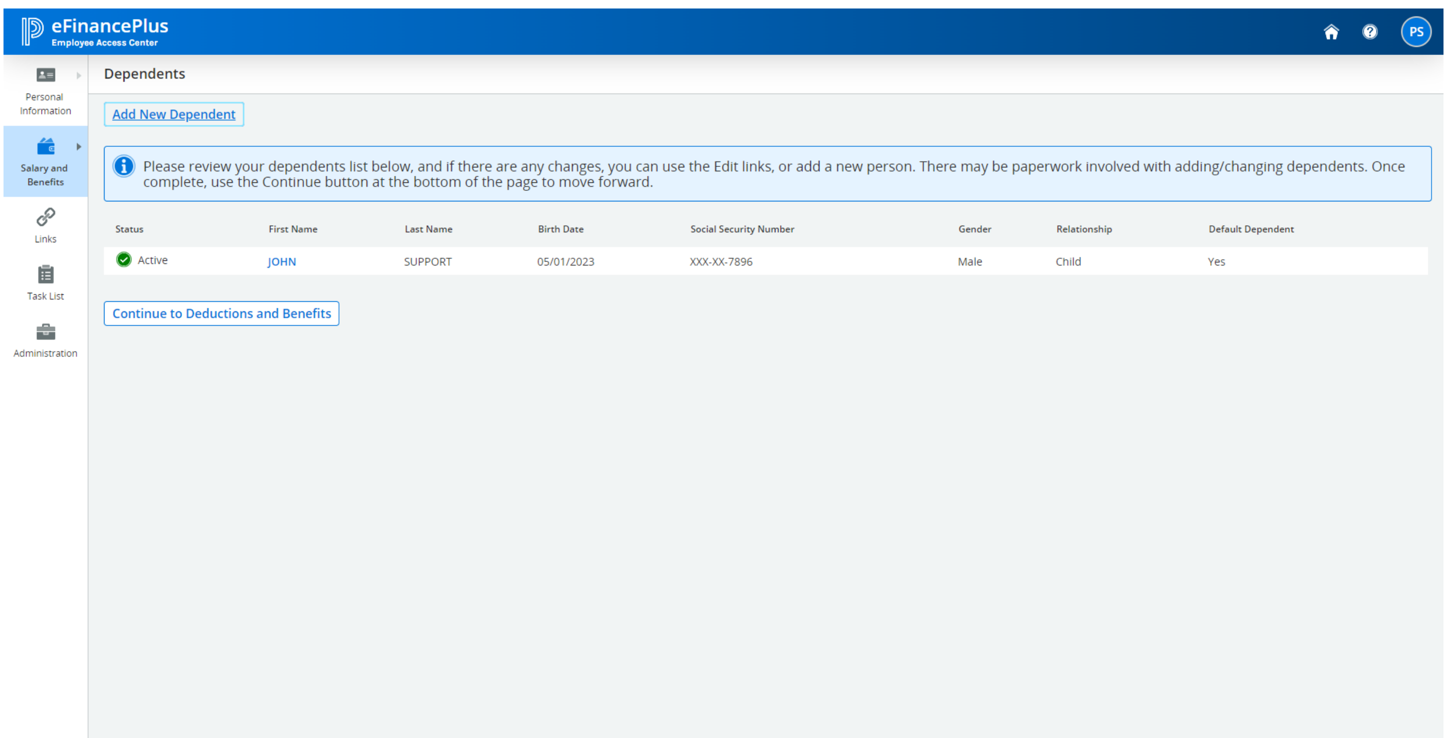
The Dependents page provides a central location for viewing, adding, and updating dependent information. The page lists everyone you designated as a dependent.

To add or edit a Dependent:

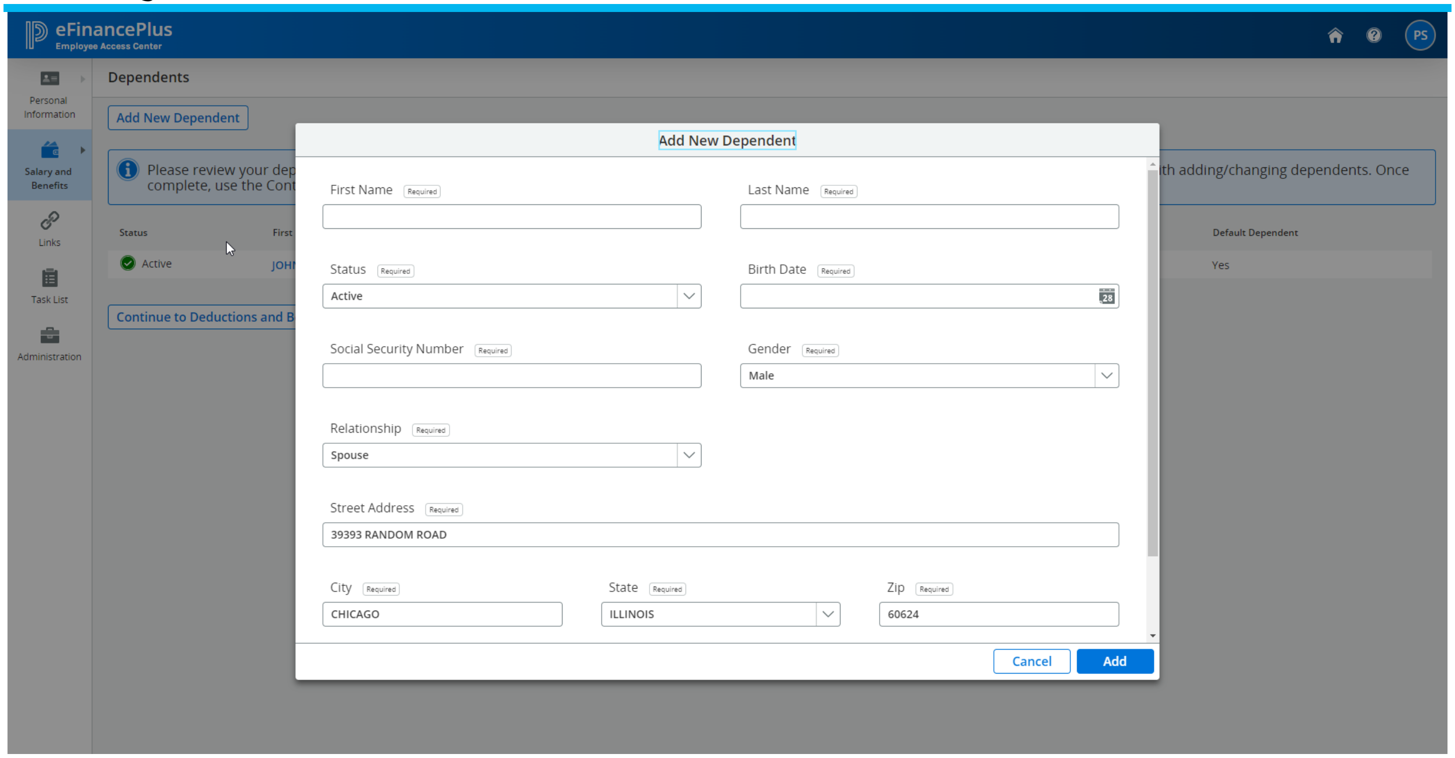
1. From the Salary and Benefits menu, select Dependents.
2. Do one of the following:
   a. To add, click Add New Dependent.
   b. To update, click the dependent's name.
3. Complete or update the fields.
4. Do one of the following:
   a. To add, click Add to create a new dependent record.
   b. To update, click Save.

Salary and Benefits





Salary and Benefits



Payroll Checks

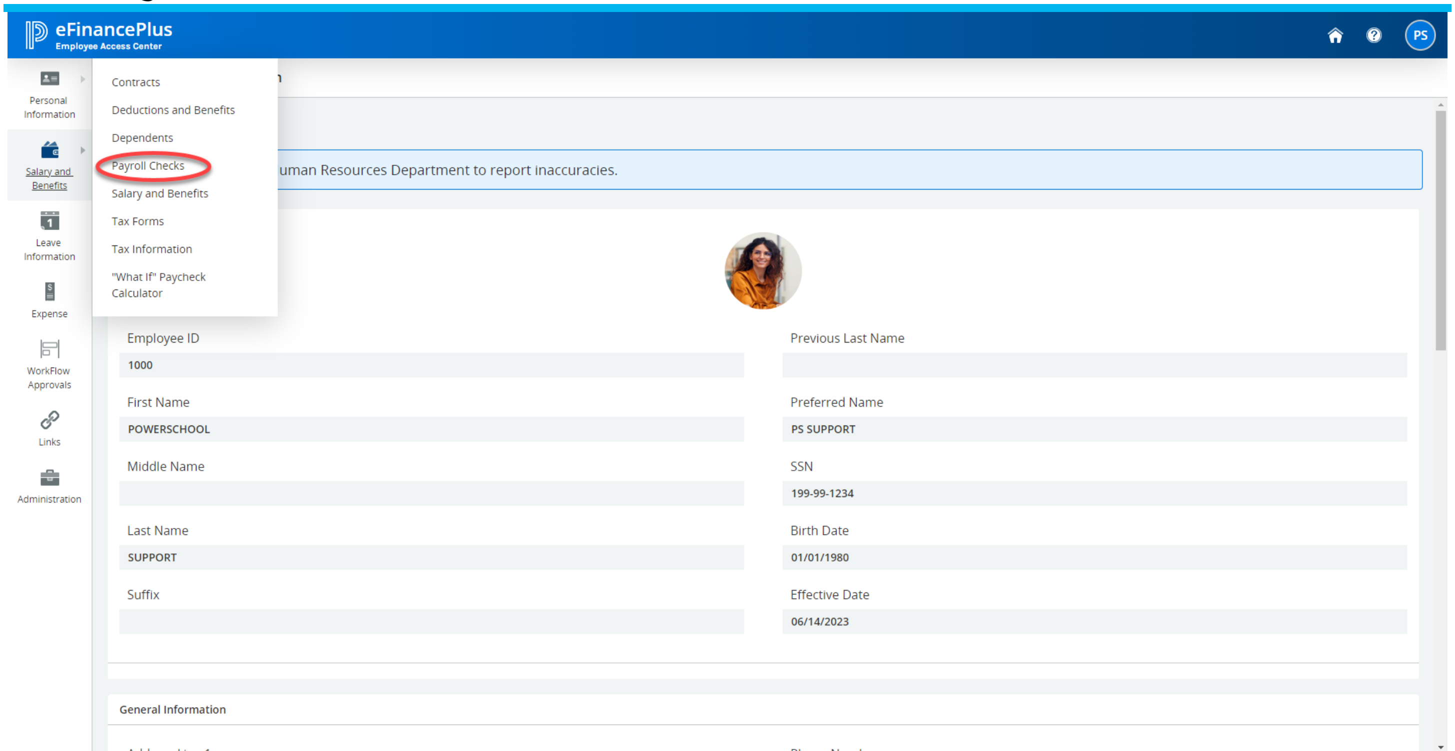
Use the Payroll Checks page to view individual checks and direct deposit vouchers that have been issued to you. Checks from other payments, such as payroll adjustments, may also be on this page.

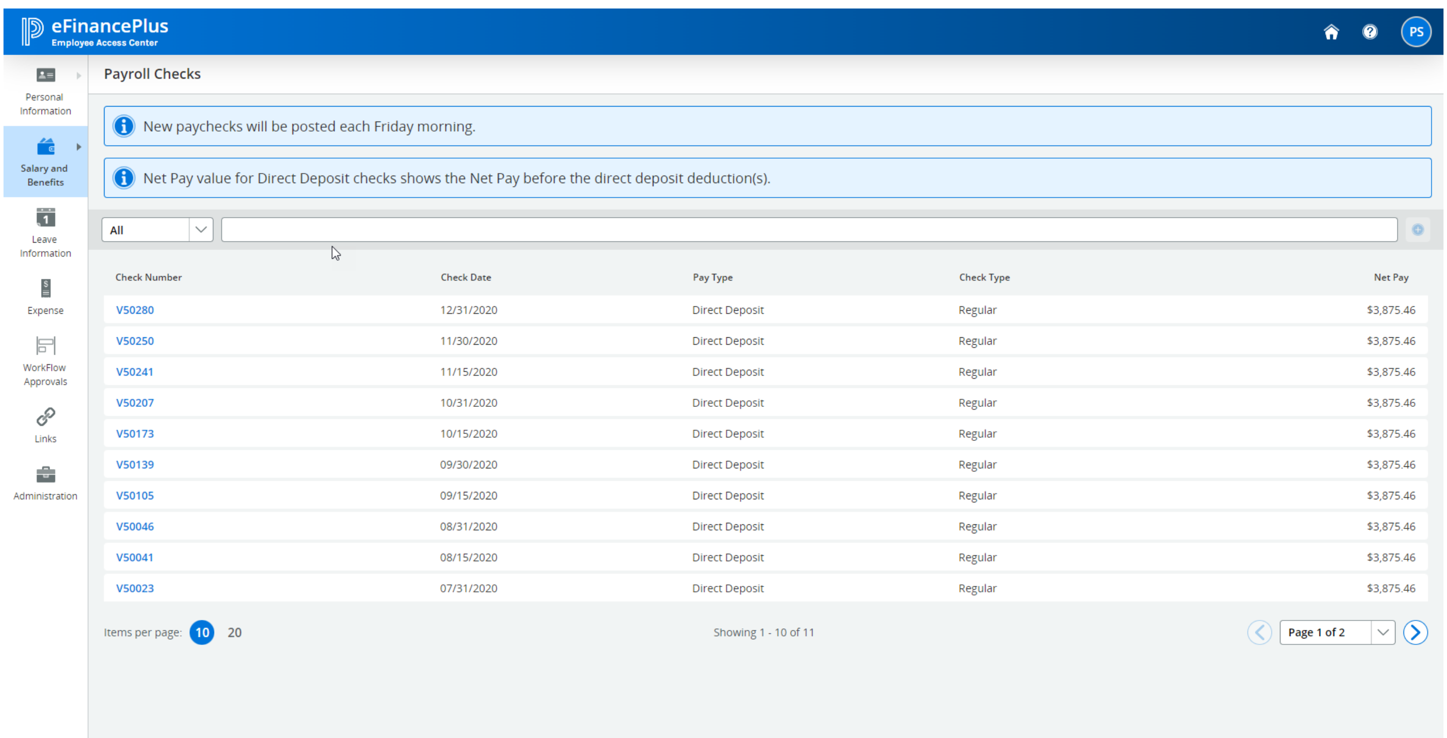
The listed Check Numbers are links to the Check Detail page. The Check Detail page is a PDF detailing all of the earning and deduction information for that check.

Printing check detail records

1. Click Payroll Checks to display the Payroll Checks page.
2. Click the desired Check Number link to generate the Check Detail PDF.
3. In the PDF viewer, choose to Save or Print the check detail record.

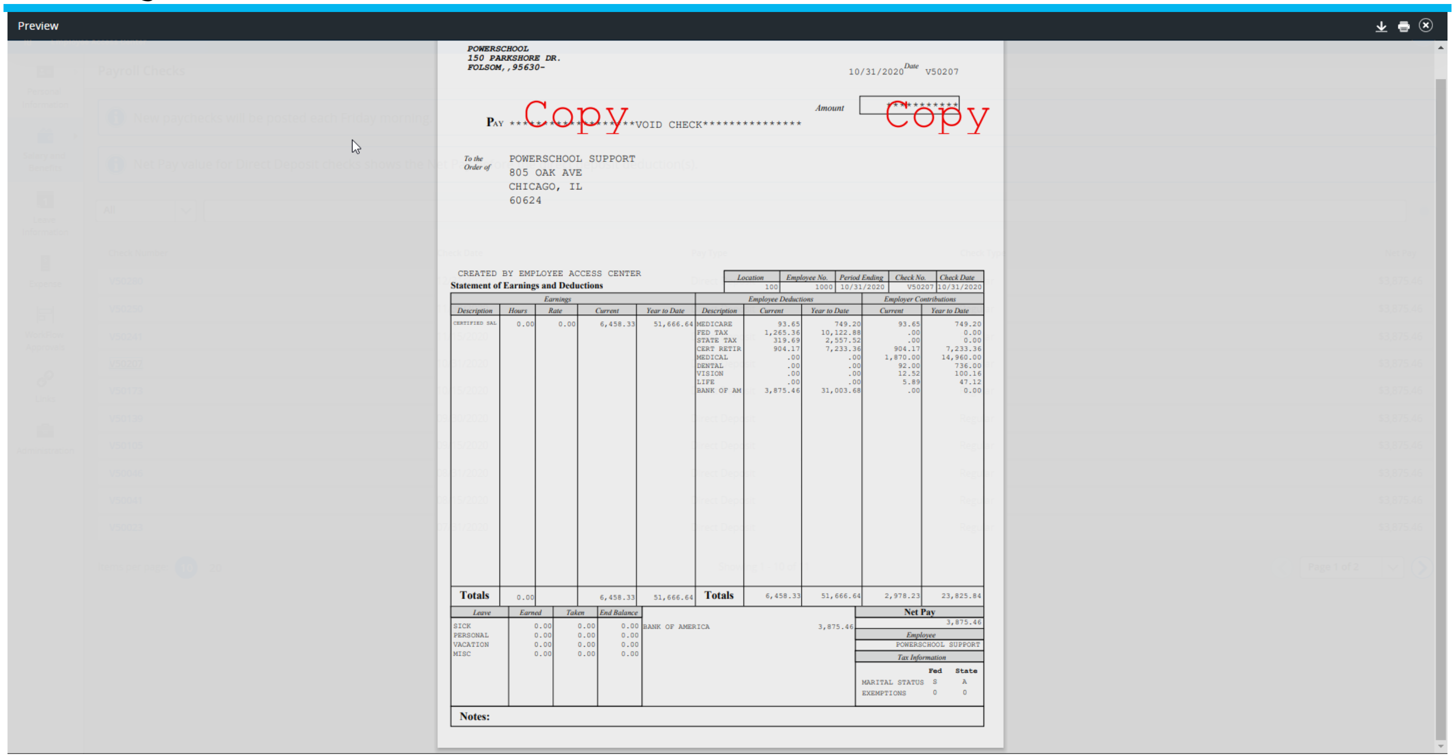
Salary and Benefits





Check Number	Check Date	Pay Type	Check Type	Net Pay
V50280	12/31/2020	Direct Deposit	Regular	$3,875.46
V50250	11/30/2020	Direct Deposit	Regular	$3,875.46
V50241	11/15/2020	Direct Deposit	Regular	$3,875.46
V50207	10/31/2020	Direct Deposit	Regular	$3,875.46
V50173	10/15/2020	Direct Deposit	Regular	$3,875.46
V50139	09/30/2020	Direct Deposit	Regular	$3,875.46
V50105	09/15/2020	Direct Deposit	Regular	$3,875.46
V50046	08/31/2020	Direct Deposit	Regular	$3,875.46
V50041	08/15/2020	Direct Deposit	Regular	$3,875.46
V50023	07/31/2020	Direct Deposit	Regular	$3,875.46

Salary and Benefits



POWERSCHOOL
150 PARKSHORE DR.
FOLSOM, ,95630-

10/31/2020 Date V50207

PAY ******************VOID CHECK*************** Amount ***********

Copy Copy

To the Order of POWERSCHOOL SUPPORT
805 OAK AVE
CHICAGO, IL
60624

CREATED BY EMPLOYEE ACCESS CENTER
Statement of Earnings and Deductions

Location	Employee No.	Period Ending	Check No.	Check Date
100	1000	10/31/2020	V50207	10/31/2020

Earnings					Employee Deductions			Employer Contributions	
Description	Hours	Rate	Current	Year to Date	Description	Current	Year to Date	Current	Year to Date
CERTIFIED SAL	0.00	0.00	6,458.33	51,666.64	MEDICARE	93.65	749.20	93.65	749.20
					FED TAX	1,265.36	10,122.88	.00	0.00
					STATE TAX	319.69	2,557.52	.00	0.00
					CERT RETIR	904.17	7,233.36	904.17	7,233.36
					MEDICAL	.00	.00	1,870.00	14,960.00
					DENTAL	.00	.00	92.00	736.00
					VISION	.00	.00	12.52	100.16
					LIFE	.00	.00	5.89	47.12
					BANK OF AM	3,875.46	31,003.68	.00	0.00
Totals	0.00		6,458.33	51,666.64	**Totals**	6,458.33	51,666.64	2,978.23	23,825.84

Leave	Earned	Taken	End Balance
SICK	0.00	0.00	0.00
PERSONAL	0.00	0.00	0.00
VACATION	0.00	0.00	0.00
MISC	0.00	0.00	0.00

BANK OF AMERICA 3,875.46

Net Pay
3,875.46

Employee
POWERSCHOOL SUPPORT

Tax Information

	Fed	State
MARITAL STATUS	S	A
EXEMPTIONS	0	0

Notes:

Salary and Benefits

Use the Salary and Benefits page to display information on your earnings and your employer's additional contributions toward your employee benefits.

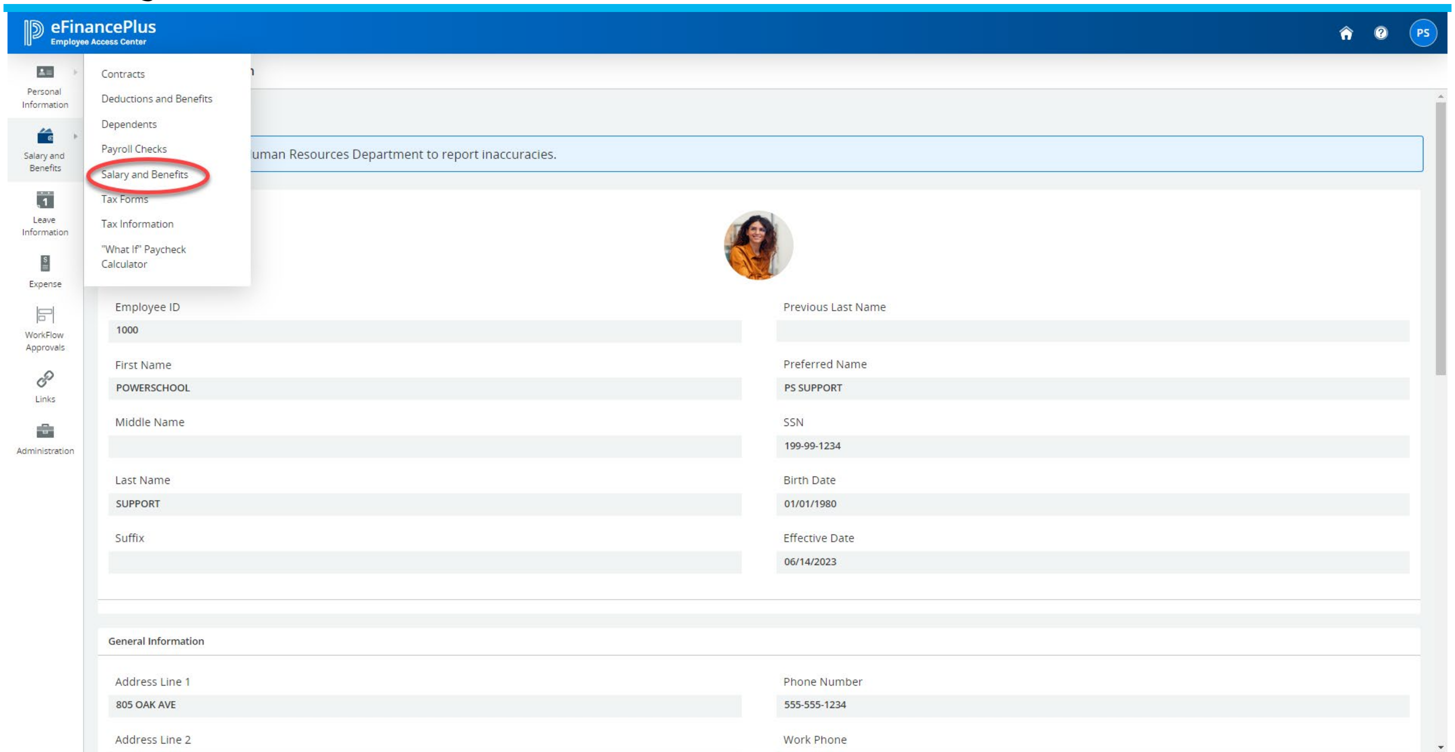
1. From the Salary and Benefits menu, click Salary and Benefits.
2. Select the desired tab:
   a. Statement: Provides detailed reports regarding your compensation.
   b. History: Provides historical information regarding your compensation for the fiscal period defined by your system administrator.

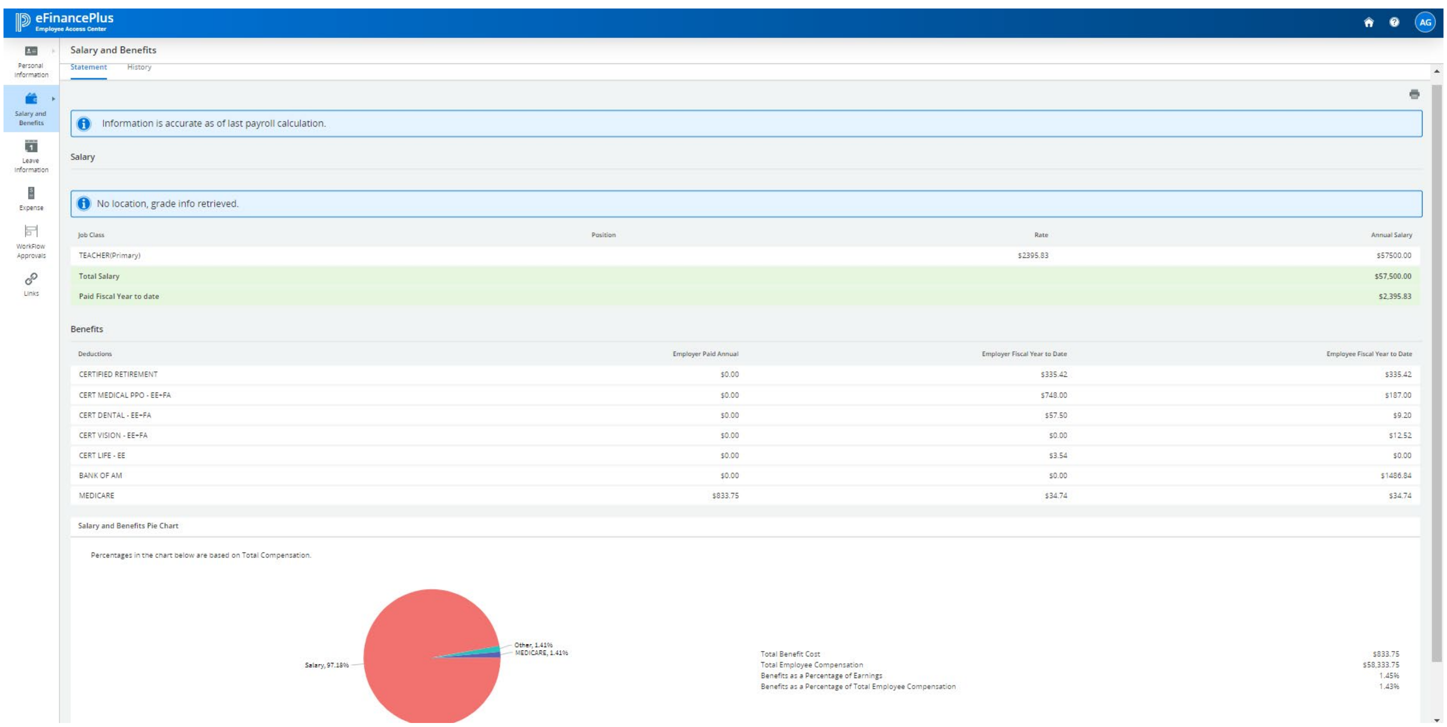
Each tab has three sections:

- Salary: Lists your wages for each pay category that applies to you.
- Benefits: Details employer and employee contributions toward benefits.
- Salary and Benefits pie chart: Displays the Salary and Benefits Statements as a graphic image.

Click the printer icon to view and print a PDF version of the reports.

Salary and Benefits





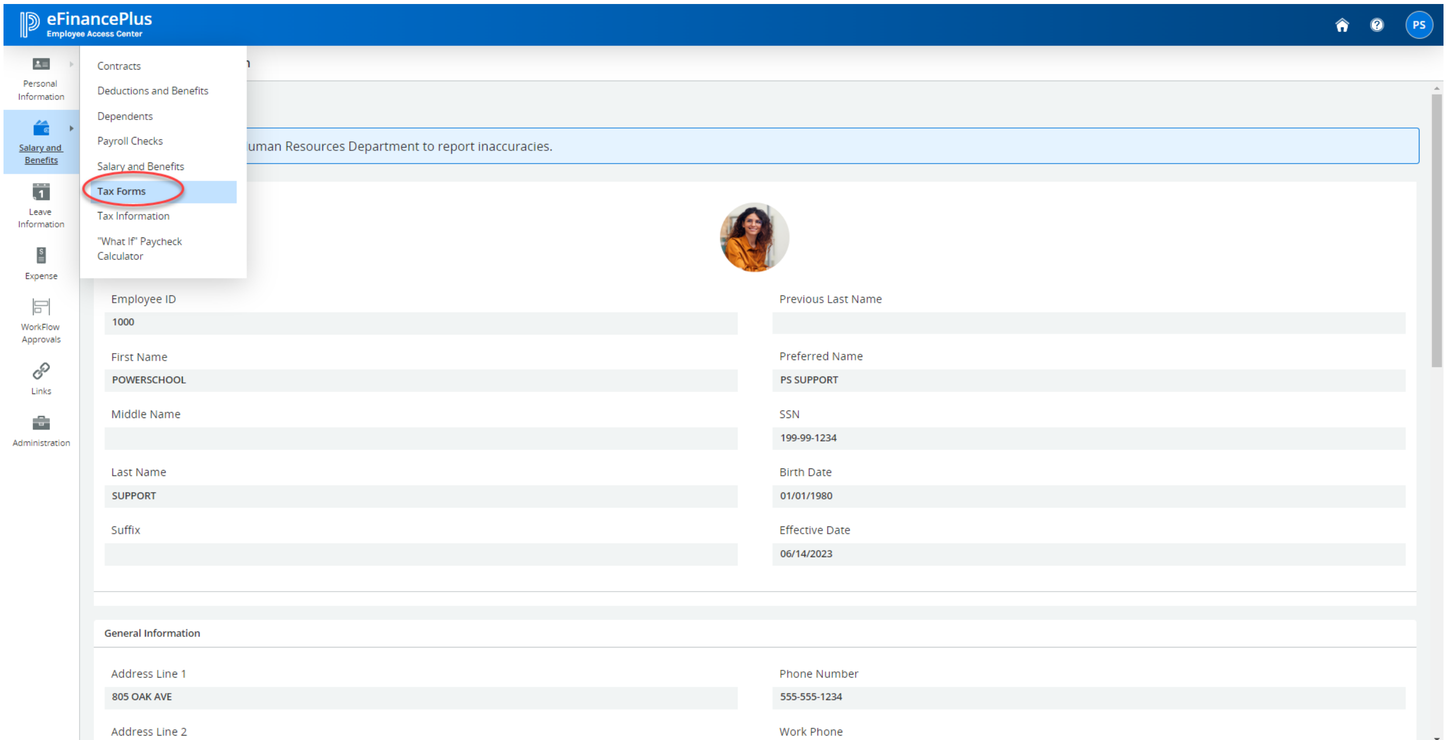
Tax Forms

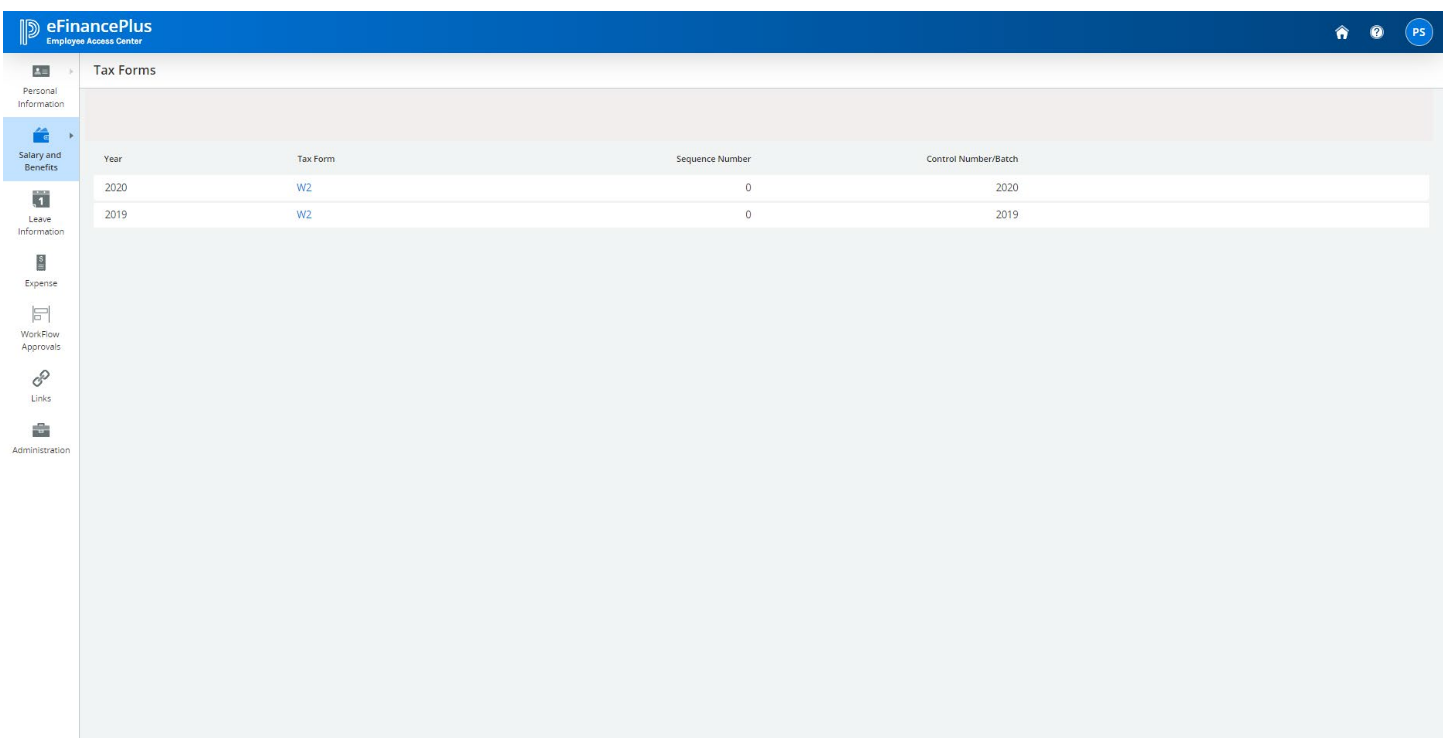
The Tax Forms page allows you to view and print copies of your W2 and 1095-C forms that have been processed from within eFinancePlus. Your access to prior year forms is dependent on the years available in the Human Resources database.

Salary and Benefits

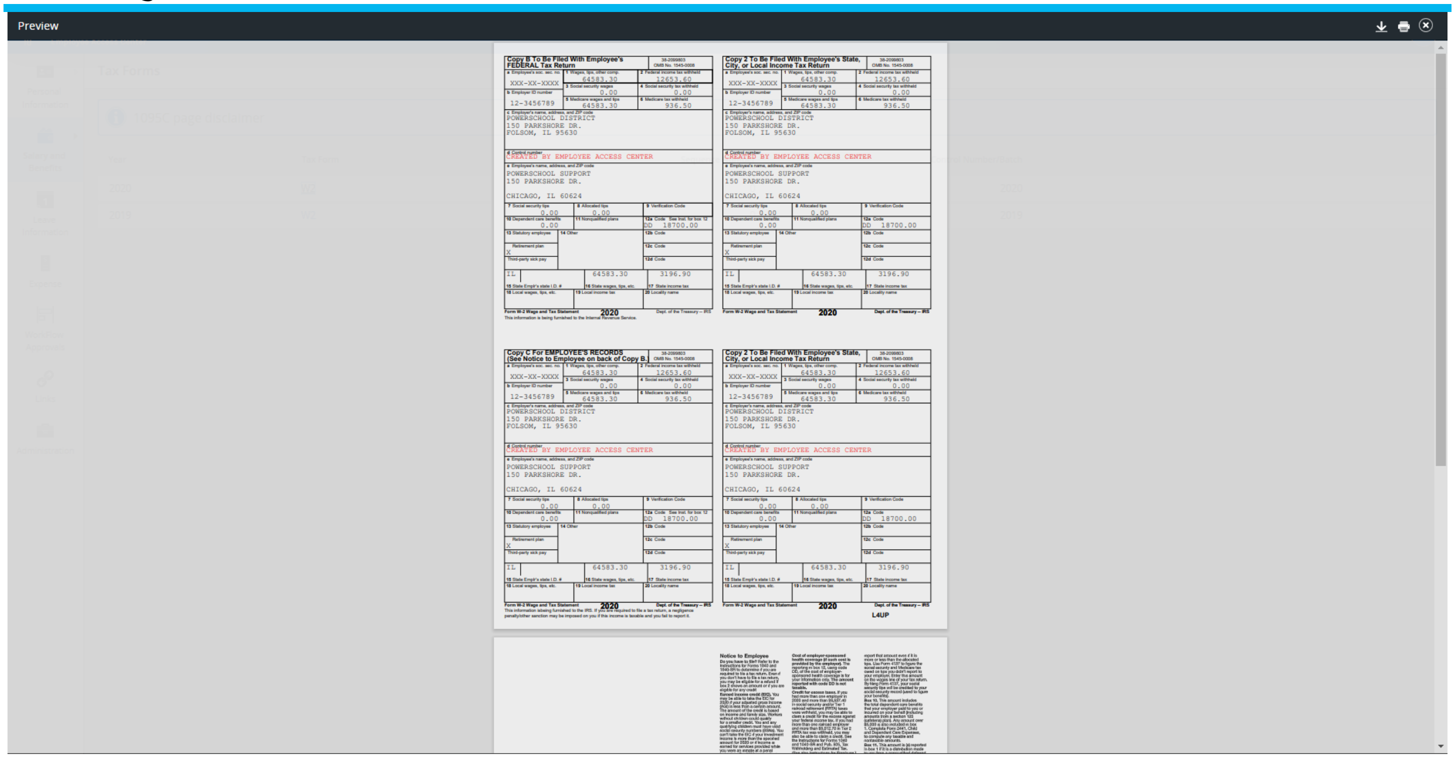
Printing W2 forms

1. Click Tax Forms from the Salary and Benefits menu to display the Tax Forms page.
2. Select the desired year from the Available Years.
3. Save the form to your computer.
4. Print the form using the PDF viewer's Print function.





Salary and Benefits



Tax Information

From the Salary and Benefits menu, select Tax Information. Use the Tax Information page to update your tax information. This page displays tax information retrieved from your payroll records in Human Resources. The page includes separate sections for Federal, State, and Local taxes.

All the information on the Tax Information page reflects the tax status settings from your payroll record in Human Resources. Contact your Human Resources department if you want to modify information but cannot see the Update button.

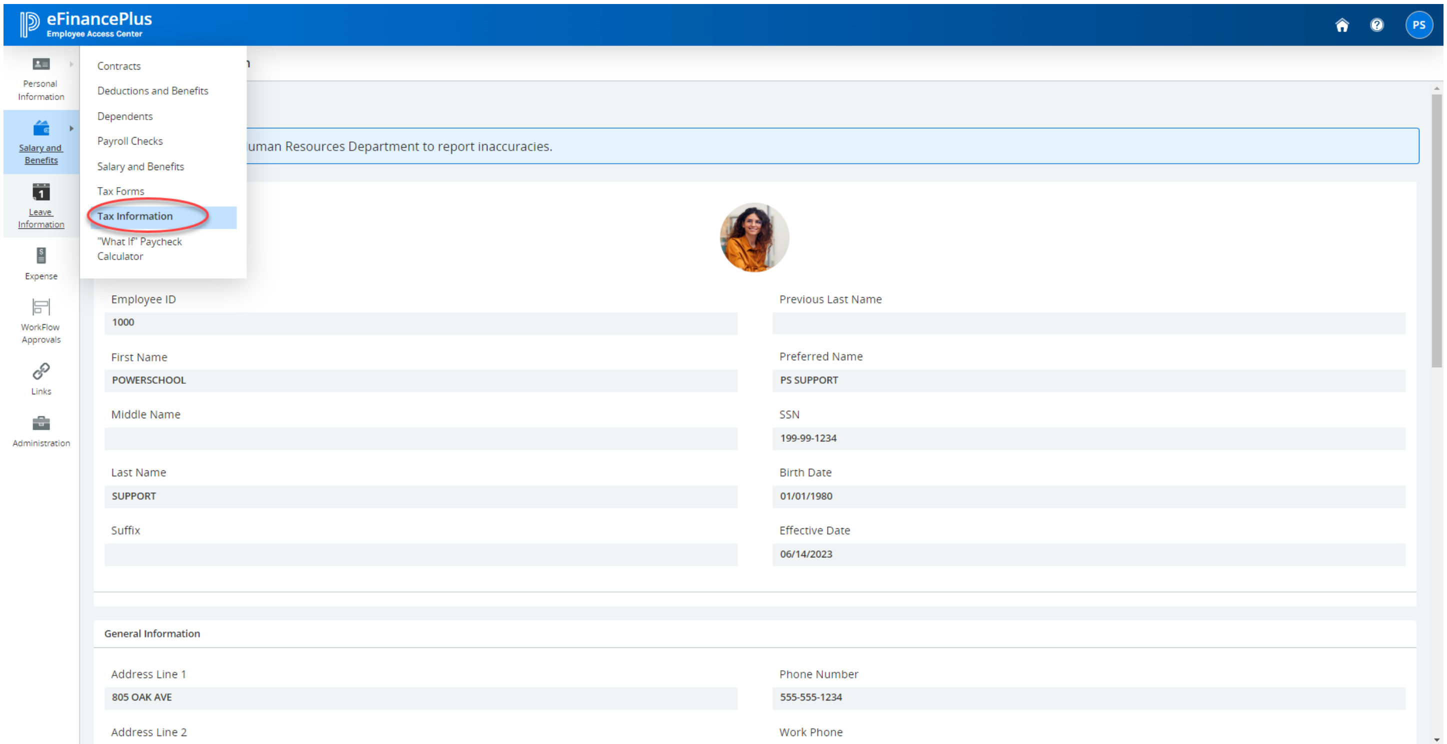
Once updates are saved, the tax information is sent to your Human Resources department to complete and post. This does not apply to the Printed W2 and Printed 1095-C fields.

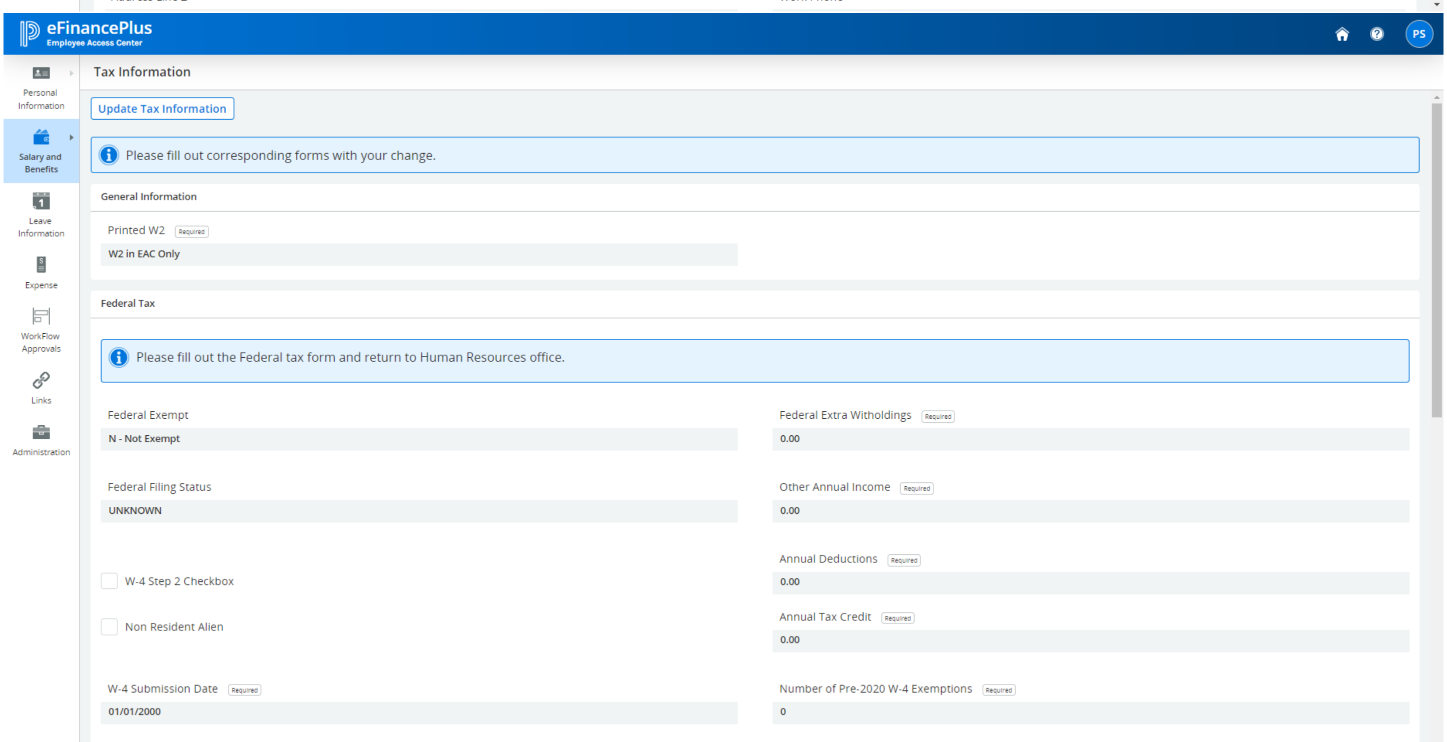
Depending on your site's setup, you may receive email notifications when vital tax information is updated via the Employee Access Center (EAC).

Update Tax Information

1. Select Update Tax Information to access the fields. Fields that are editable are:
    a. Federal
        i. Printed W2
        ii. Federal Tax Exempt
        iii. Federal Filing Status
        iv. W-4 Step 2 Check Box
        v. Non Resident Alien
        vi. Federal Extra Withholdings
        vii. Other Annual Income
        viii. Annual Deductions
        ix. Annual Tax Credit
    b. State/Federal
        i. Varies based on your State and Local tax authority.
2. Use the Add Attachment button to attach supporting documentation for your change.

3. Click Save.





“What if” Paycheck Calculator

Use the "What If" Paycheck Calculator in Employee Access Center (EAC) to simulate the calculation of your take home pay given specifics in pay rates, deductions, benefits, and taxes. The calculator allows you to input hourly or salaried pay amounts and make adjustments that affect your tax and deduction withholdings.

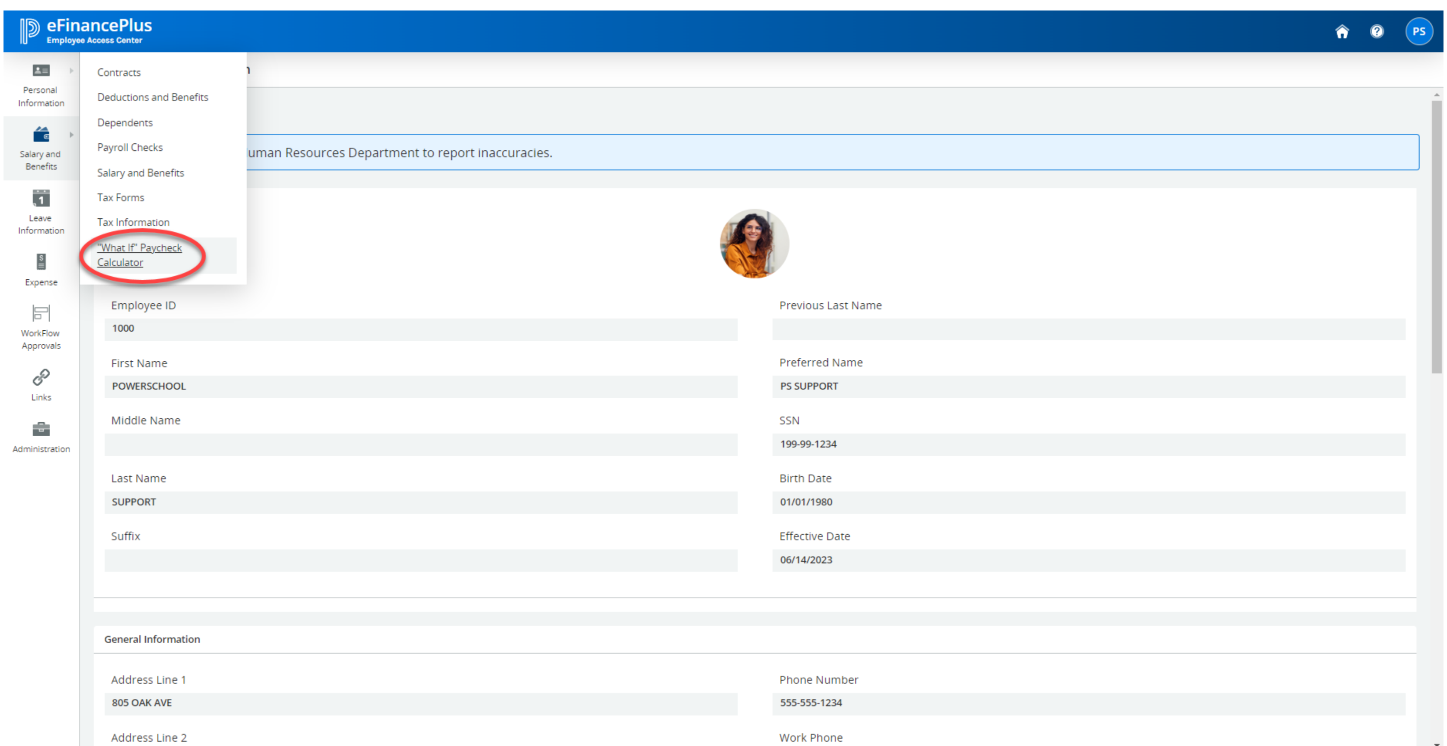
Salary and Benefits

The calculation is intended to provide general guidance. Consider the result an estimate of your net pay rather than the actual amount that may appear on your paycheck.

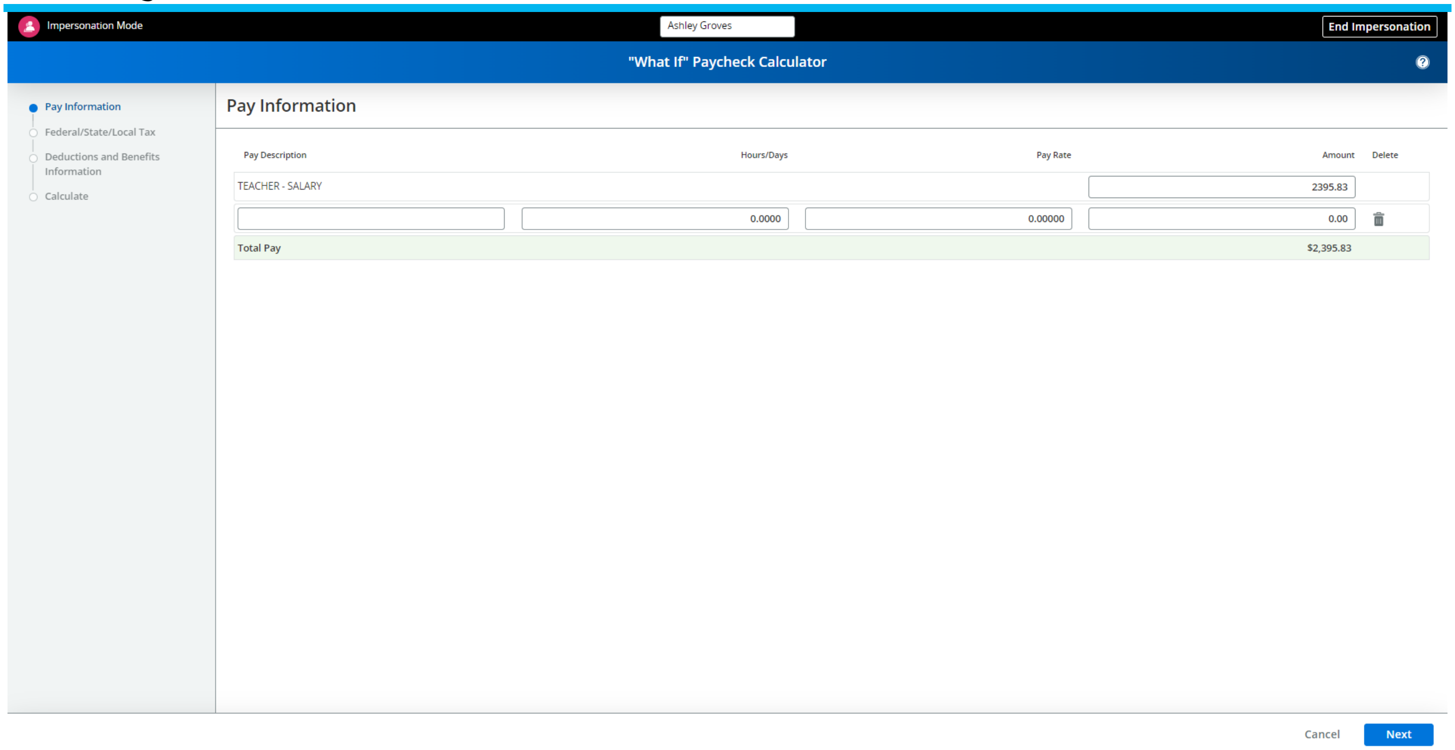
Calculating an estimate of your net pay

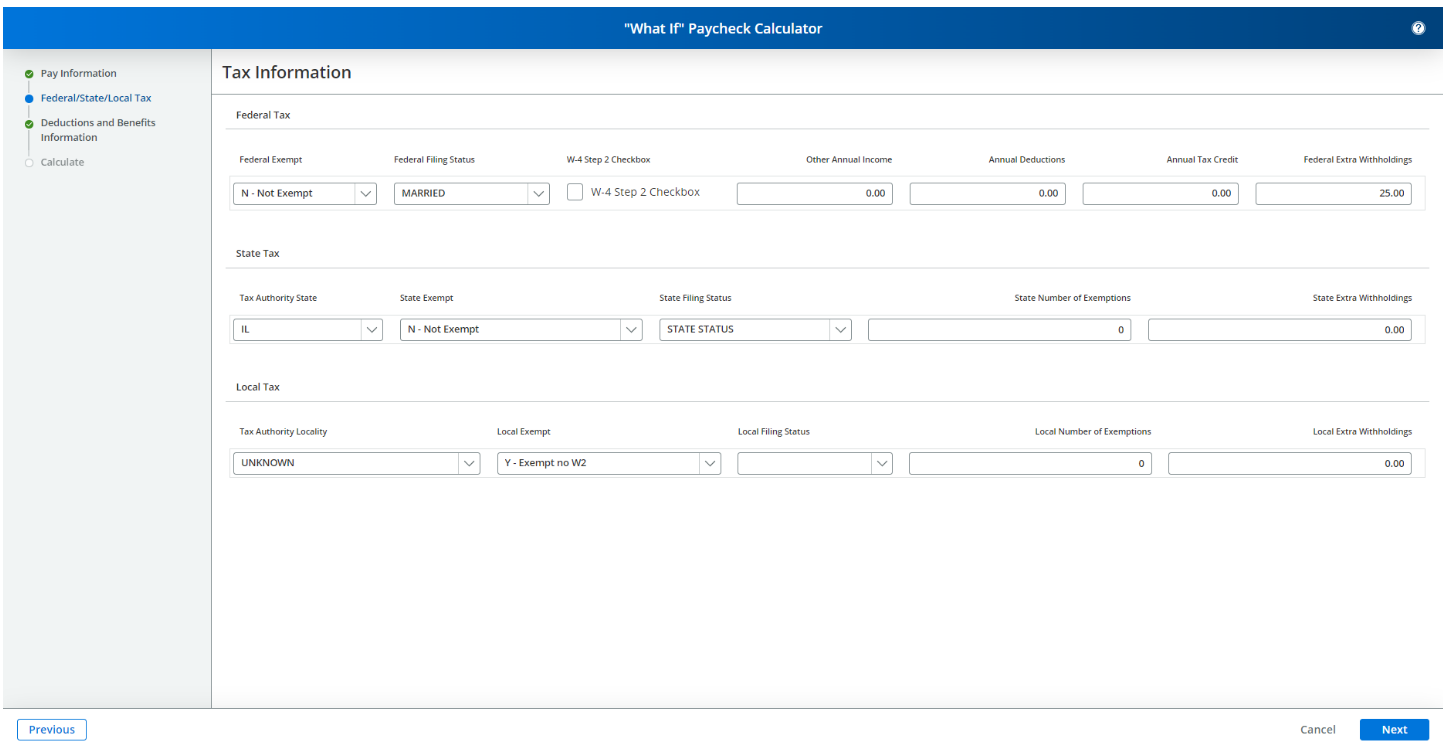
1. Click "What If" Paycheck Calculator to display the "What If" Paycheck Calculator page.
2. This page uses a two-page process for inputting information and a third page for displaying the results:

Pay Information	This page displays when you select the "What If" Paycheck Calculator task from the EAC menu. Initially, the page shows your current pay amounts. As needed, you can adjust your pay and add multiple pay lines. To add an additional pay rate, click New Pay Line. When you complete the page, click Next.
Taxes Page	This page shows your current federal, state, and local tax settings. You can change tax settings as needed. When you complete the page, click Next.
Deduction and Benefit Information Page	This page displays your current withholdings for deductions and benefits. You can add and exclude withholdings as needed. To add a deduction or benefit, click New Deduction. To remove a deduction or benefit from the calculation, clear the Include in Calculation option. When you complete your entries, click Calculate to display the results.
Results Page	The final page displays the results of your calculation, including the Total Gross Earnings, Total Taxes and Deductions, and Net Pay. To generate a printout of the page's calculations, click Print. To perform another calculation, click New Calculation.

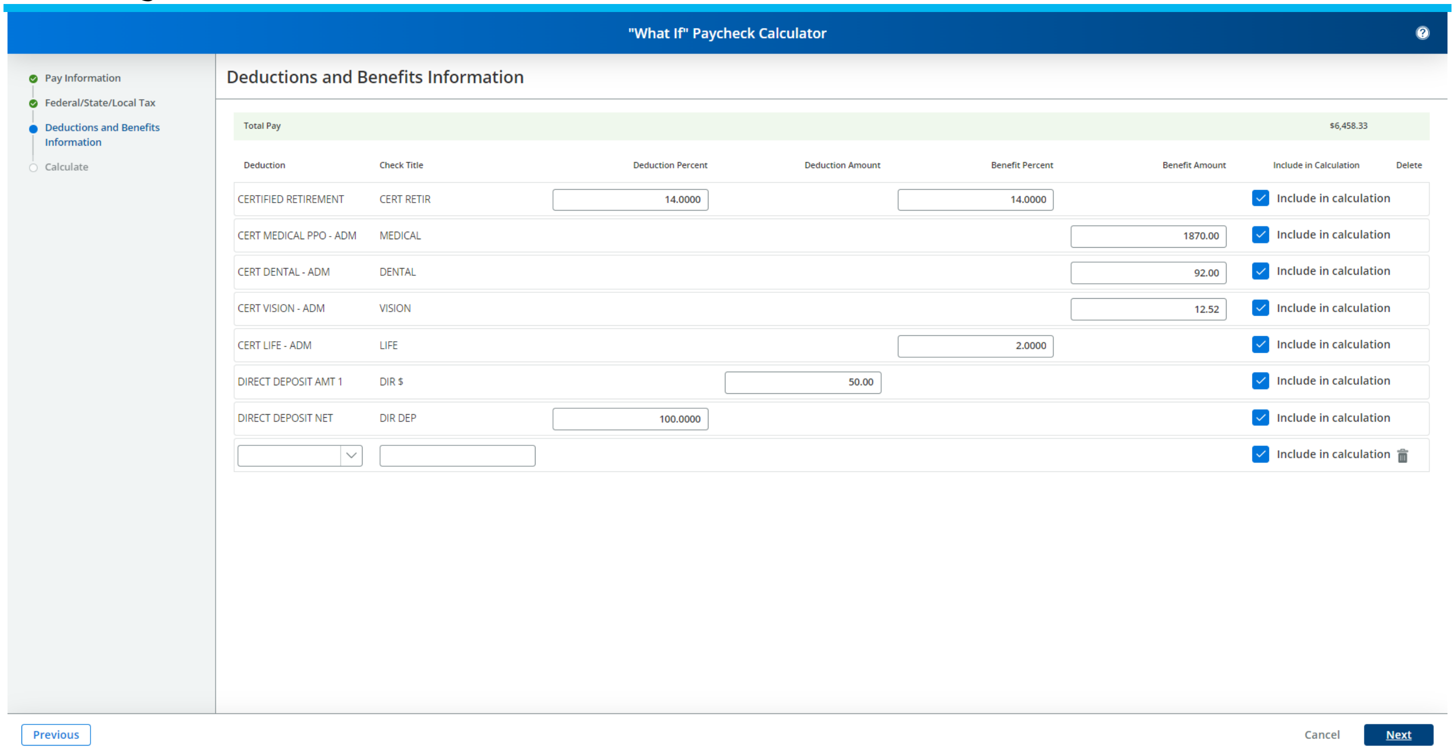


Salary and Benefits





Salary and Benefits



"What If" Paycheck Calculator

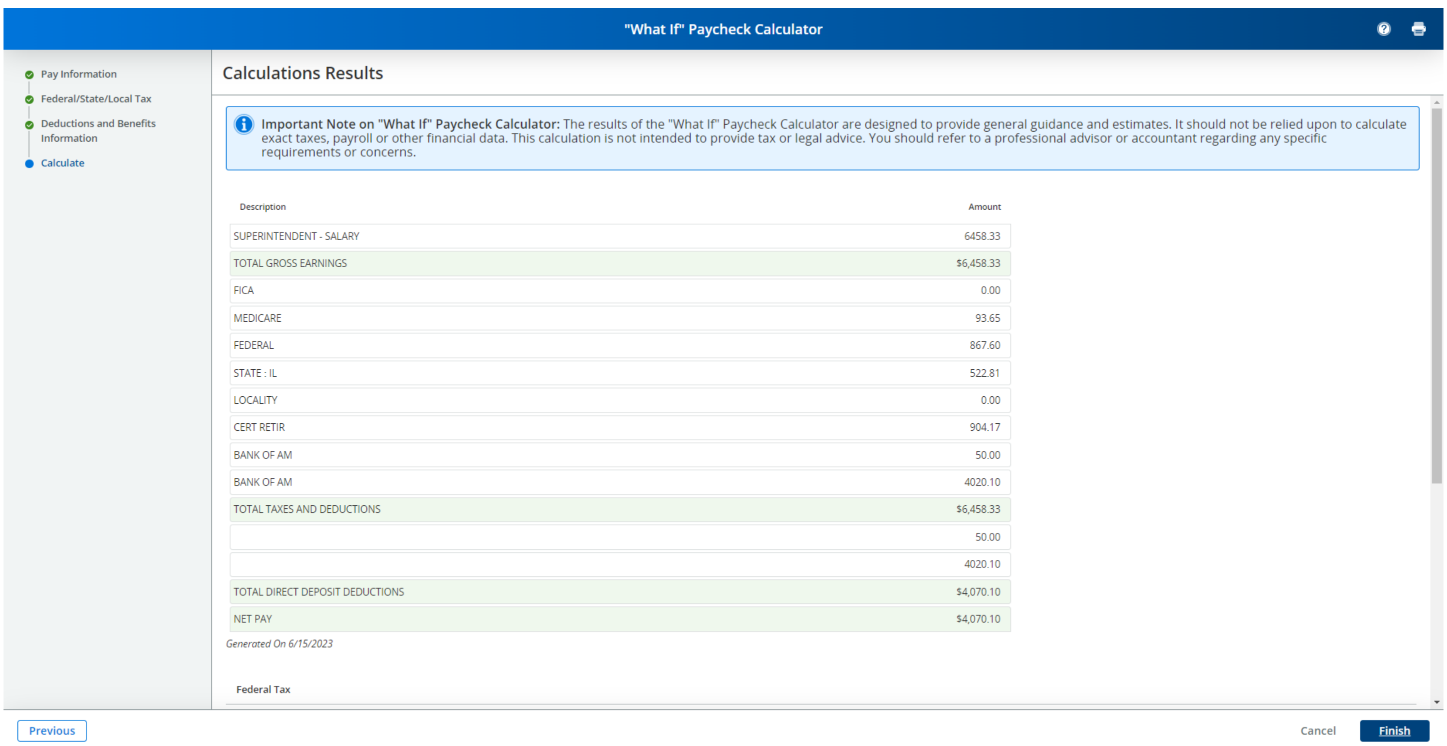
- Pay Information
- Federal/State/Local Tax
- Deductions and Benefits Information
- Calculate

Deductions and Benefits Information

Total Pay							$6,458.33

Deduction	Check Title	Deduction Percent	Deduction Amount	Benefit Percent	Benefit Amount	Include in Calculation	Delete
CERTIFIED RETIREMENT	CERT RETIR	14.0000		14.0000		Include in calculation	
CERT MEDICAL PPO - ADM	MEDICAL				1870.00	Include in calculation	
CERT DENTAL - ADM	DENTAL				92.00	Include in calculation	
CERT VISION - ADM	VISION				12.52	Include in calculation	
CERT LIFE - ADM	LIFE			2.0000		Include in calculation	
DIRECT DEPOSIT AMT 1	DIR $		50.00			Include in calculation	
DIRECT DEPOSIT NET	DIR DEP	100.0000				Include in calculation	
						Include in calculation	

Previous Cancel Next



"What If" Paycheck Calculator

- Pay Information
- Federal/State/Local Tax
- Deductions and Benefits Information
- Calculate

Calculations Results

Important Note on "What If" Paycheck Calculator: The results of the "What If" Paycheck Calculator are designed to provide general guidance and estimates. It should not be relied upon to calculate exact taxes, payroll or other financial data. This calculation is not intended to provide tax or legal advice. You should refer to a professional advisor or accountant regarding any specific requirements or concerns.

Description	Amount
SUPERINTENDENT - SALARY	6458.33
TOTAL GROSS EARNINGS	$6,458.33
FICA	0.00
MEDICARE	93.65
FEDERAL	867.60
STATE : IL	522.81
LOCALITY	0.00
CERT RETIR	904.17
BANK OF AM	50.00
BANK OF AM	4020.10
TOTAL TAXES AND DEDUCTIONS	$6,458.33
	50.00
	4020.10
TOTAL DIRECT DEPOSIT DEDUCTIONS	$4,070.10
NET PAY	$4,070.10

Generated On 6/15/2023

Federal Tax

Previous Cancel Finish

Leave Information

If the District has configured the use of Leave Requests via the Employee Access Center, the Employee Leave Information page is available to view leave information and create leave requests.

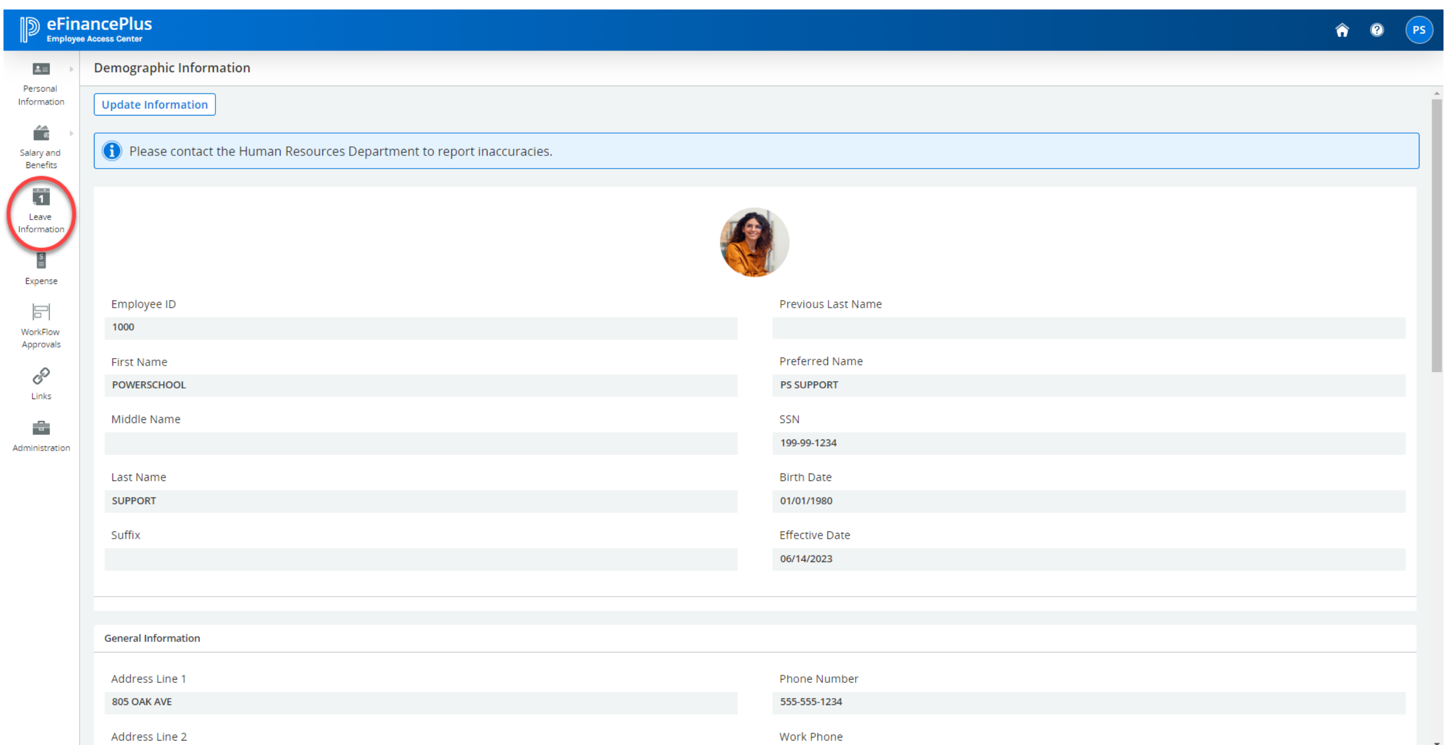
This page displays the history of employee leave requests, which are separated by Leave Type. The Leave List shows the status of each leave request. Employees can do the following:

- View leave balances and requests by leave type.
- Edit or cancel outstanding leave requests.
- View, edit, and add attachments.

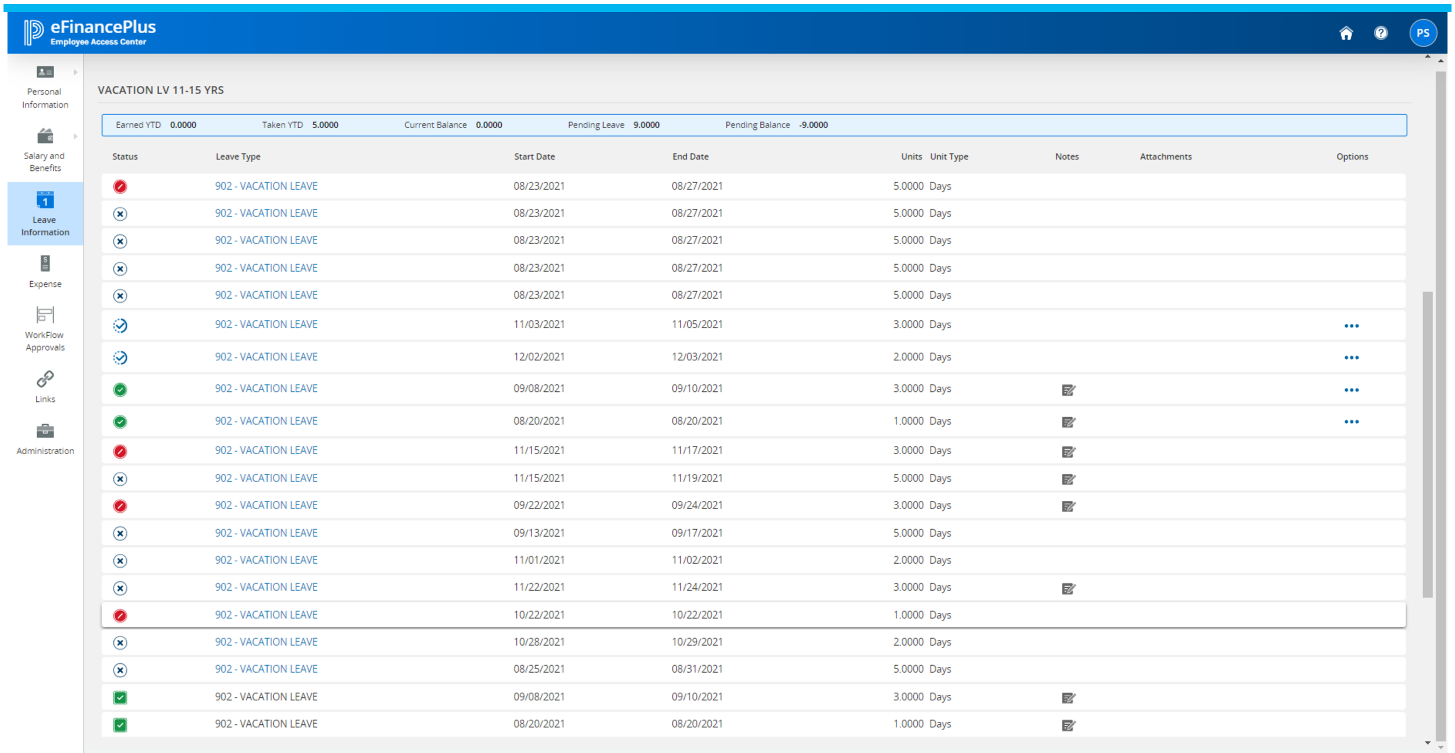
View and Edit Leave Requests

View Leave Requests

1. Choose the Leave Information page.
2. View the status of leave requests on the List page:
    a. Posted (Green Check)
    b. Pending Approval (Half Circle Blue Check)
    c. Denied (Red Circle With Line)
    d. Canceled (Circle With Blue X)
    e. Needs Correction
3. Select the Leave Code/Title to view the Leave Request Details page which provides more detailed information on the leave request, including the approval history.
    a. If you select the Leave Code/Title for a leave request with a Status of Needs Correction, the Edit Leave Request box is displayed, so you can make the necessary changes.
4. If a leave request has notes or attachments, click the icons to view them.

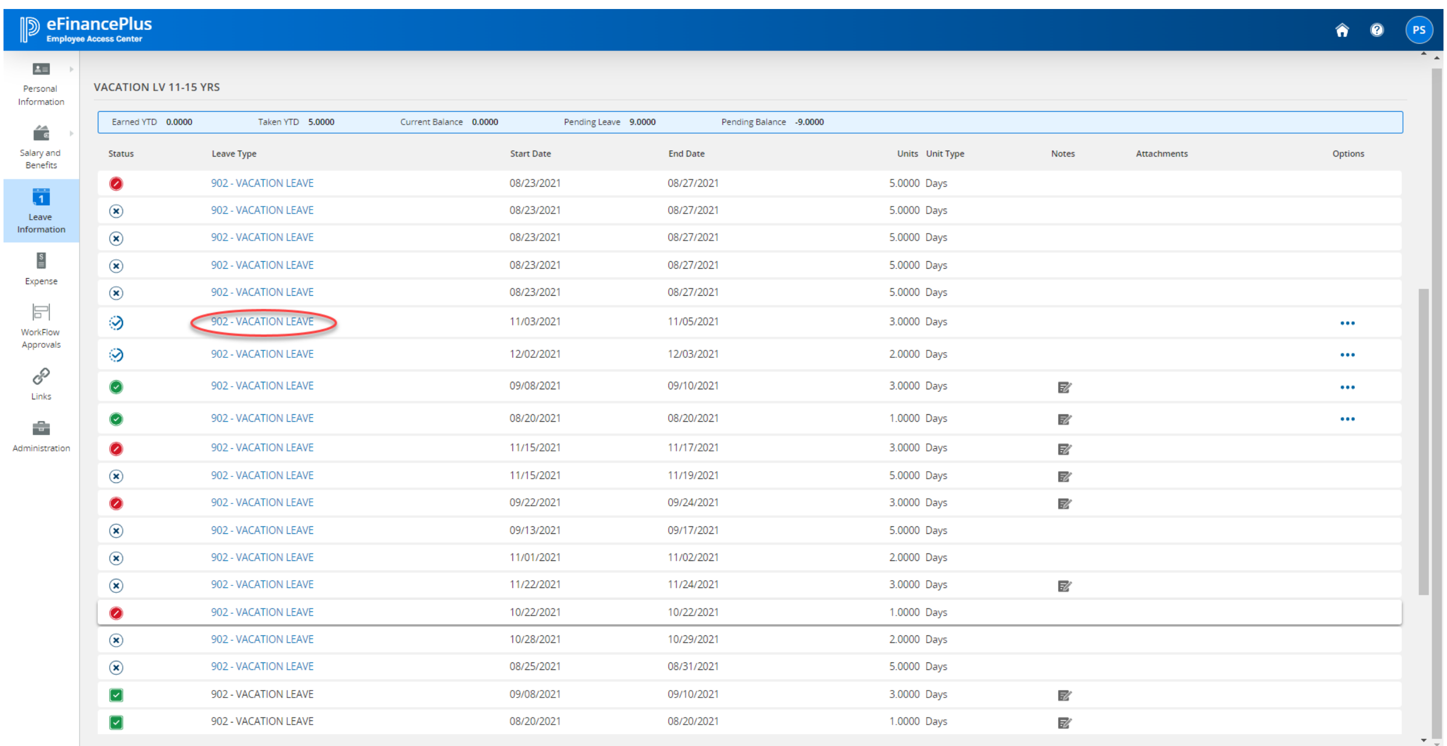


Leave Information

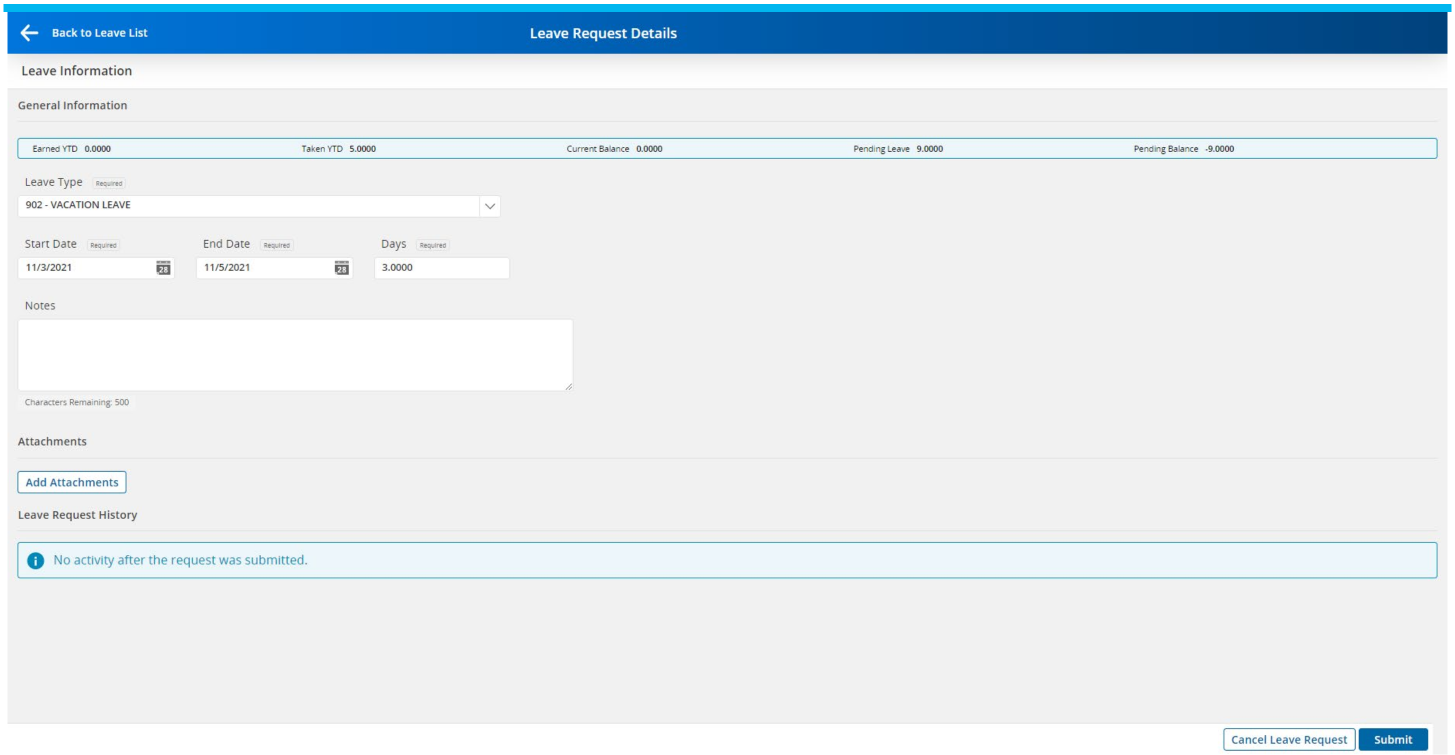


Edit Leave Requests

You may edit any leave request that has a Status of Pending Approval or Needs Correction by selecting the record. This will open the Leave request Details and allow changes to be made.



Leave Information



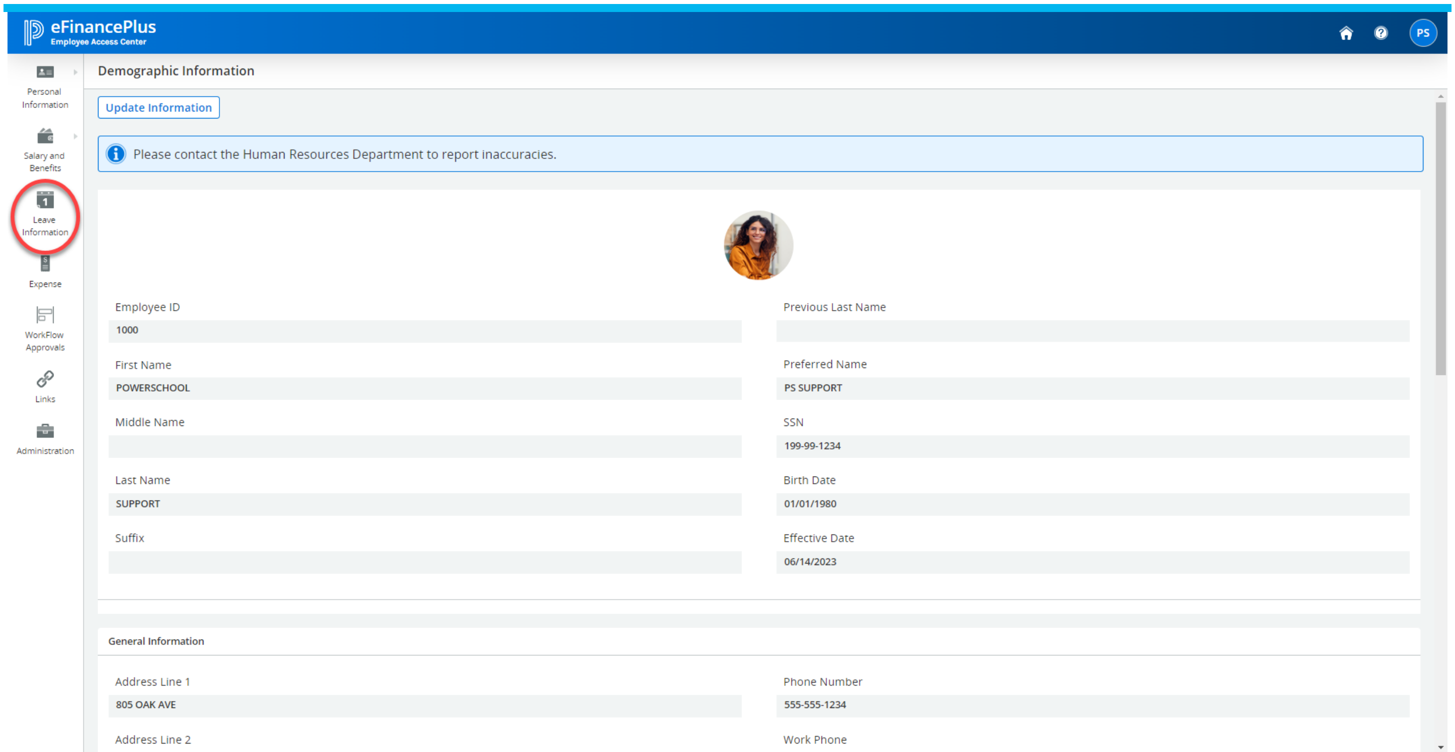
Leave Request Form

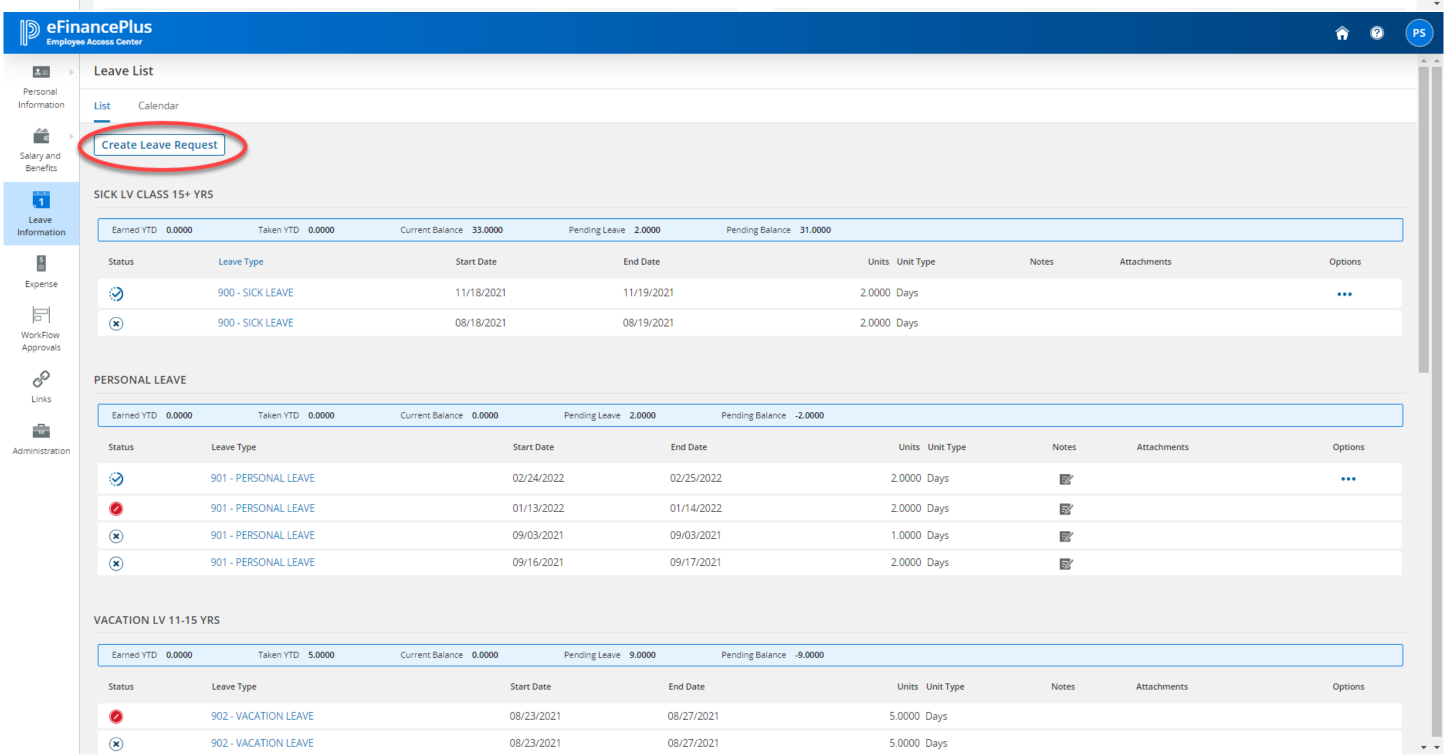
Use this form to submit a new leave request.

Create a Leave Request

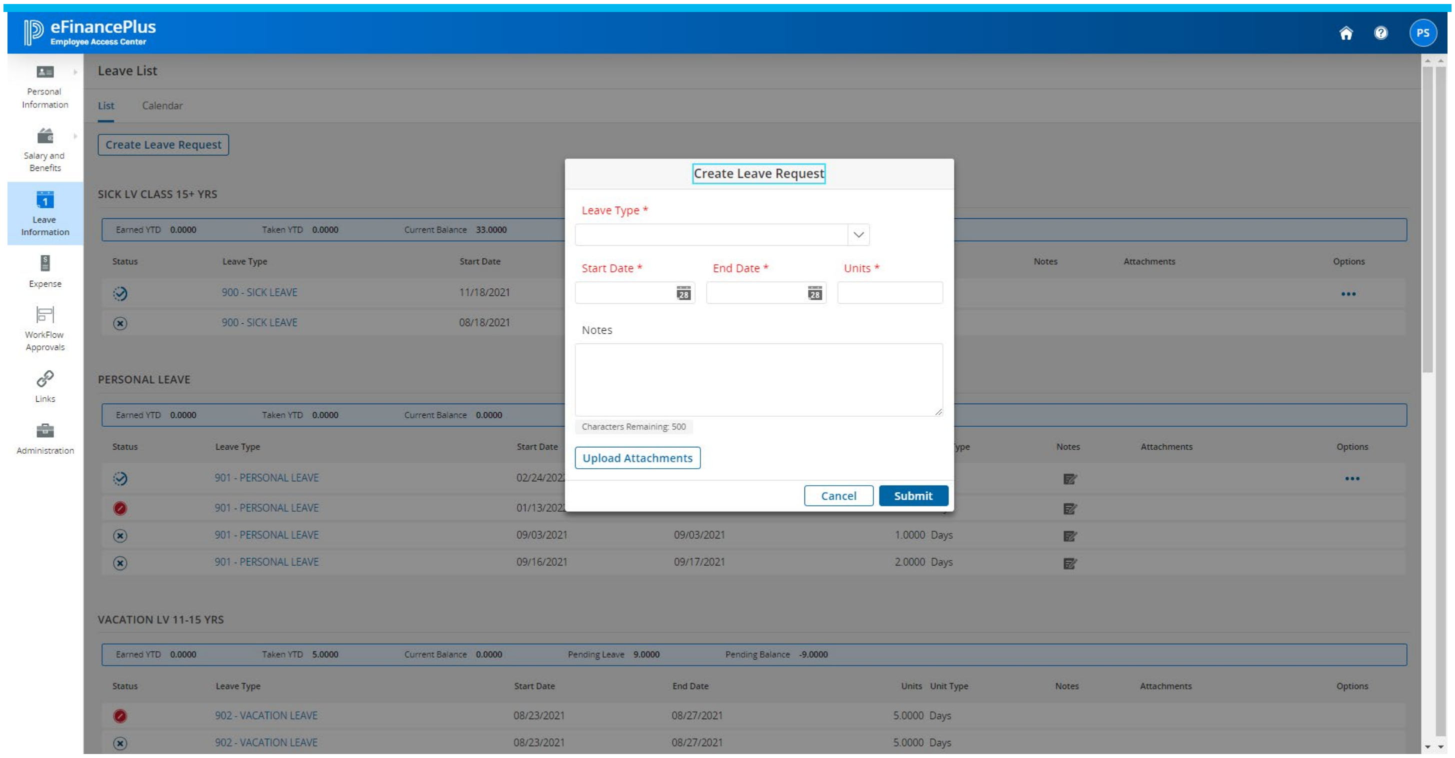
1. Choose the Leave Information page.
2. Select Create Leave Request.
3. Complete the fields as needed. The Units field changes based on how the Leave Unit is defined in the Leave Table. For instance, if the Leave Type is measured in Hours, the Unit field will display as Hours when you select the Leave Type.
4. If desired, enter a description in Notes.
5. If desired, select Upload Attachments to include any supporting documentation for the leave request.
6. Click Submit.

Leave Information





Leave Information

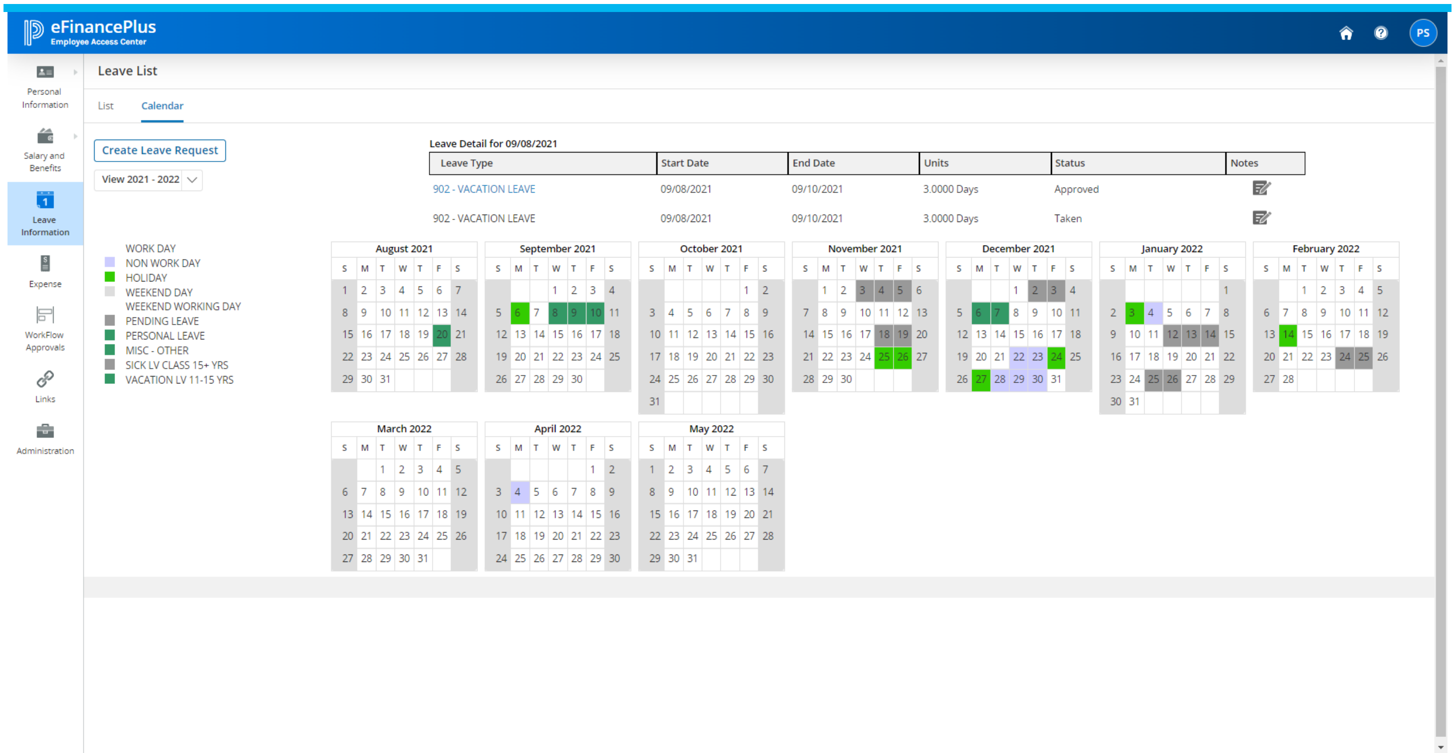


Calendar

The Calendar tab provides a view of the entire year. It includes all workdays, holidays, and leave days. You can use the calendar to view leave requests.

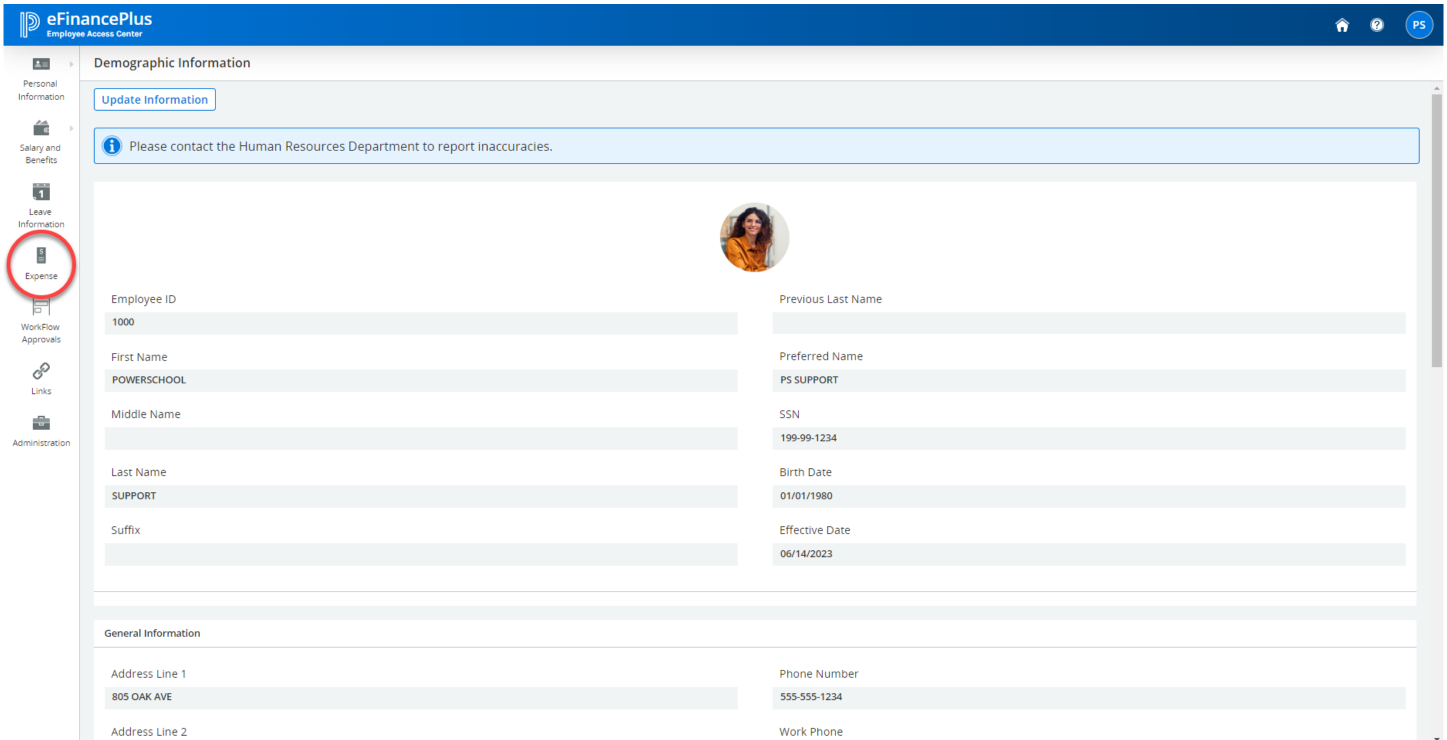
1. Choose the Leave Information page.
2. Select the Calendar tab.
3. Click the date on the calendar for the leave request to view. For example, if there is a leave day on February 8, click that date.
4. Click the Leave Type.

Leave Information



Expense

If the District has configured the use of Expenses via Employee Access Center, the Expense module allows employees with access to Employee Access Center to view, enter, edit, and submit requests for expense reimbursements. These requests, when approved, convert to payable entries and issue checks for the Vendor ID associated with the employee.



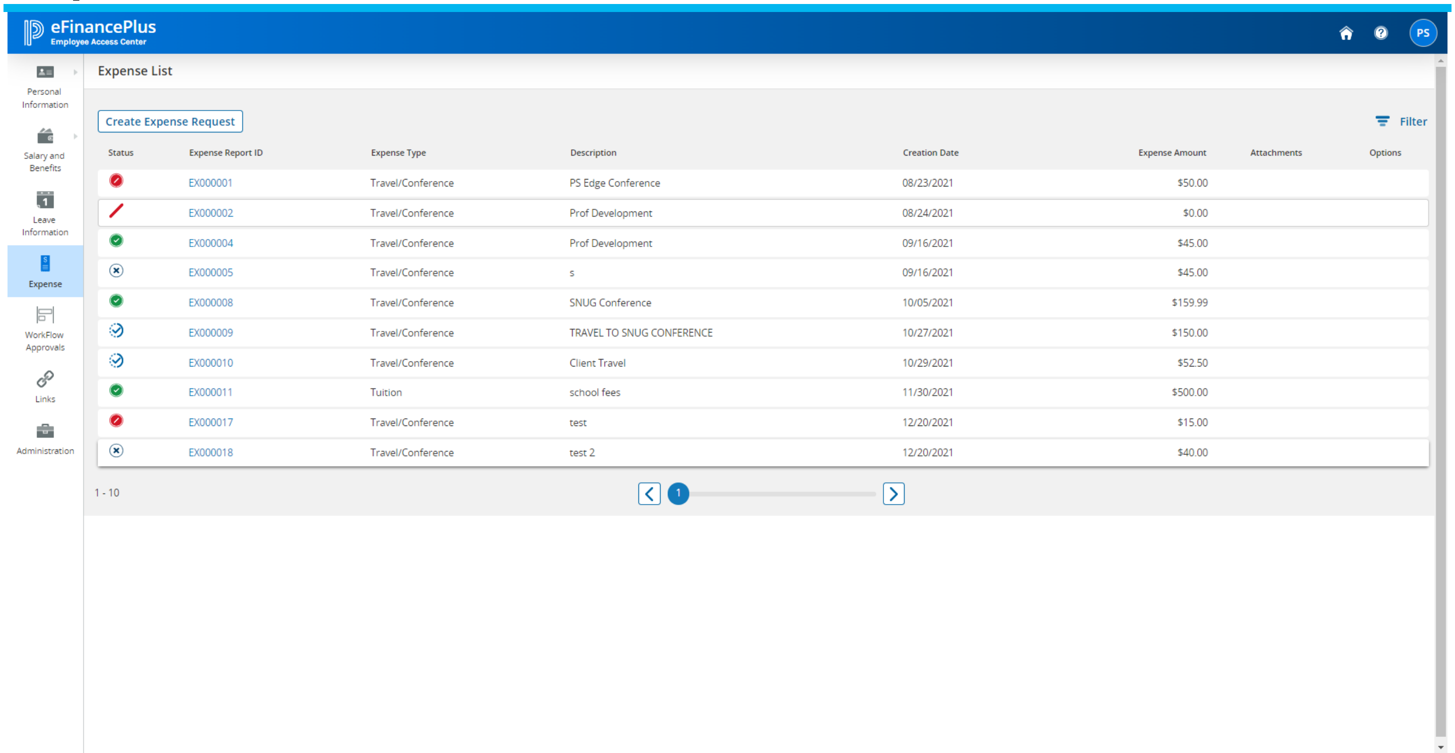
Expense List Page

This page displays the history of expense reimbursement requests made by an employee. The expense list gives the status of each expense reimbursement request. Employees can also display all attachments.

View the Expense List

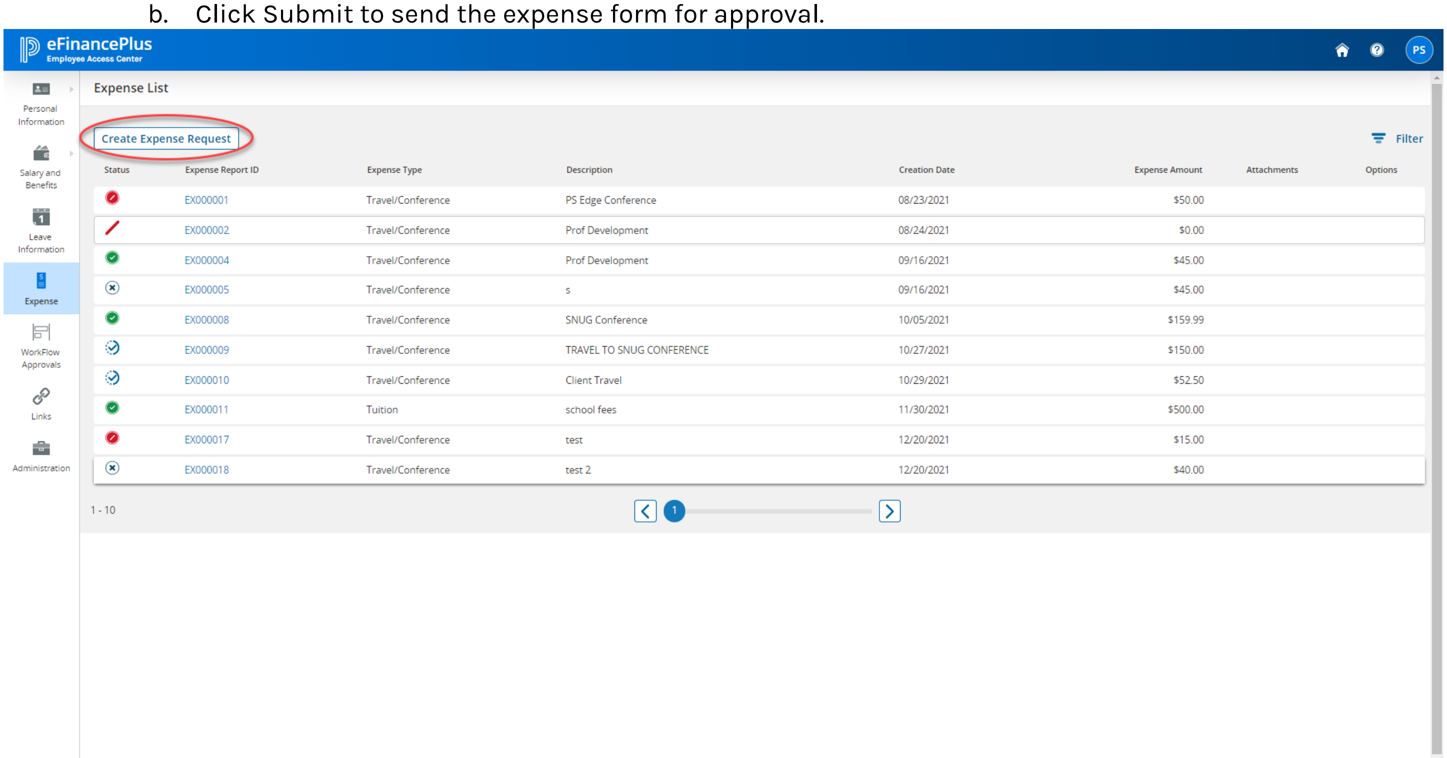
1. Select the Expense List page.
2. Review the status of the expense forms on the List page. Use the navigation bar at the bottom of the page to display older expense forms.
3. Select the Expense Report ID to view the Expense Detail page. This page displays expense reimbursement requests with the following statuses:
    a. Approved (Green Check)
    b. In progress (Red Slash)
    c. Denied (Red Circle With Line)
    d. Canceled (White Circle With Blue X)
4. Click Attachments to display receipts or supporting documentation.
5. Hover over Status to display comments, if entered, by the approvers.

Expense

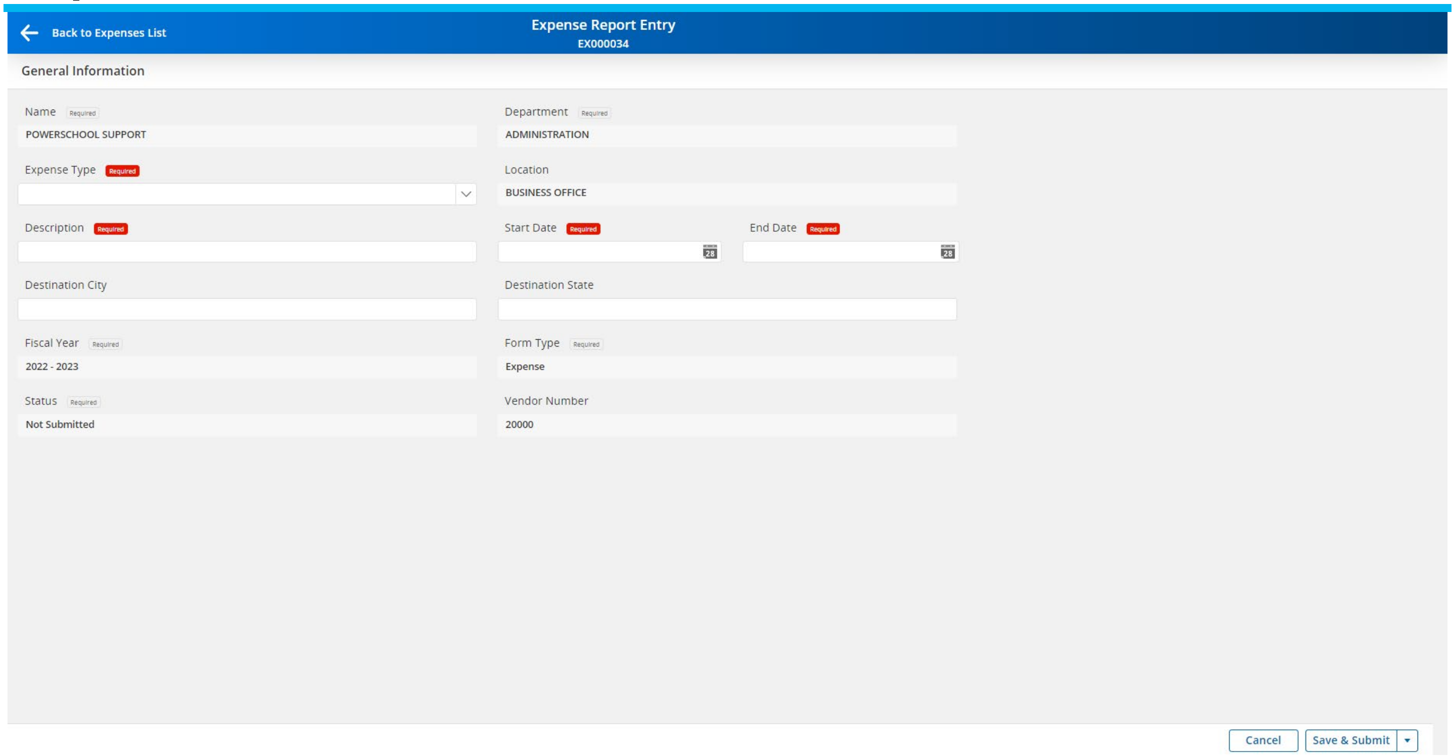


Create an Expense Request

1. Choose the Create Expense Request page.
2. Complete the necessary fields on the page.
3. If the Expense Form requires multiple line items, click Add Row to add a new line item.
4. Choose one of the following options:
   a. Click Save. This saves the expense form as a draft that can be reviewed and finished later, if necessary.
   b. Click Submit to send the expense form for approval.



Expense



Expense Detail Page

This page displays all the information for a selected expense reimbursement form. It also displays the status of the approved and denied expense reimbursement forms.

This page includes the following three sections:

- Status Bar - Displays the status in the form of a banner for approved and denied expenses.
- General Information - Information about the Name of the requester, Start Date, Department, End Date, Expense Type, Description, Location, Destination, Fiscal Year, Advanced Check Number, Expense Check Number, and Purchase Order Number.
- Expense Summary - Information about the expense line items for Expense Date, Expense Category, Units, Cost, Estimated Cost, Actual Cost, Budget Unit, Account, Project, Advance Flag, Reimbursement Flag, Attachments, and Comments.

Expense

Back to Expenses List

Expense Details

Expense Details - EX000008

Approved

General Information

Name	POWERSCHOOL SUPPORT	Start Date	10/05/2021
Department	ADMINISTRATION	End Date	10/05/2021
Expense Type	1000 - Travel/Conference	Description	SNUG Conference
Location	BUSINESS OFFICE	Destination	,
Vendor Number	20000		
Fiscal Year	2021 - 2022	Advanced Check Number	
Purchase Order Number		Expense Check Number	

Expense Summary

Expense Date	Expense Category	Units	Cost	Estimated Cost	Actual Cost	Budget Unit	Account	Project	Project Account	Advances	Reimbursement	Attachments	Comments
10/05/2021	10500 - Lodging	1	$159.9900		$159.99	0012510000110000 BUSINESS OFFICE	434 CLASS MEETING EXPENSE			No	Yes		
Totals				$0.00	$159.99								
Total Reimbursable Amount													$159.99
Total Advance Amount													$0.00
Total Amount Due to Employee													$159.99

Links

The Links page can display links to external pages that the district has deemed to be useful for employees. These are managed by the District Administrators. Select the Links menu to access the page.