

# eFinancePlus Employee Access Center End User Supplement

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# Employee Access Center Overview

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## Employee Access Center Overview

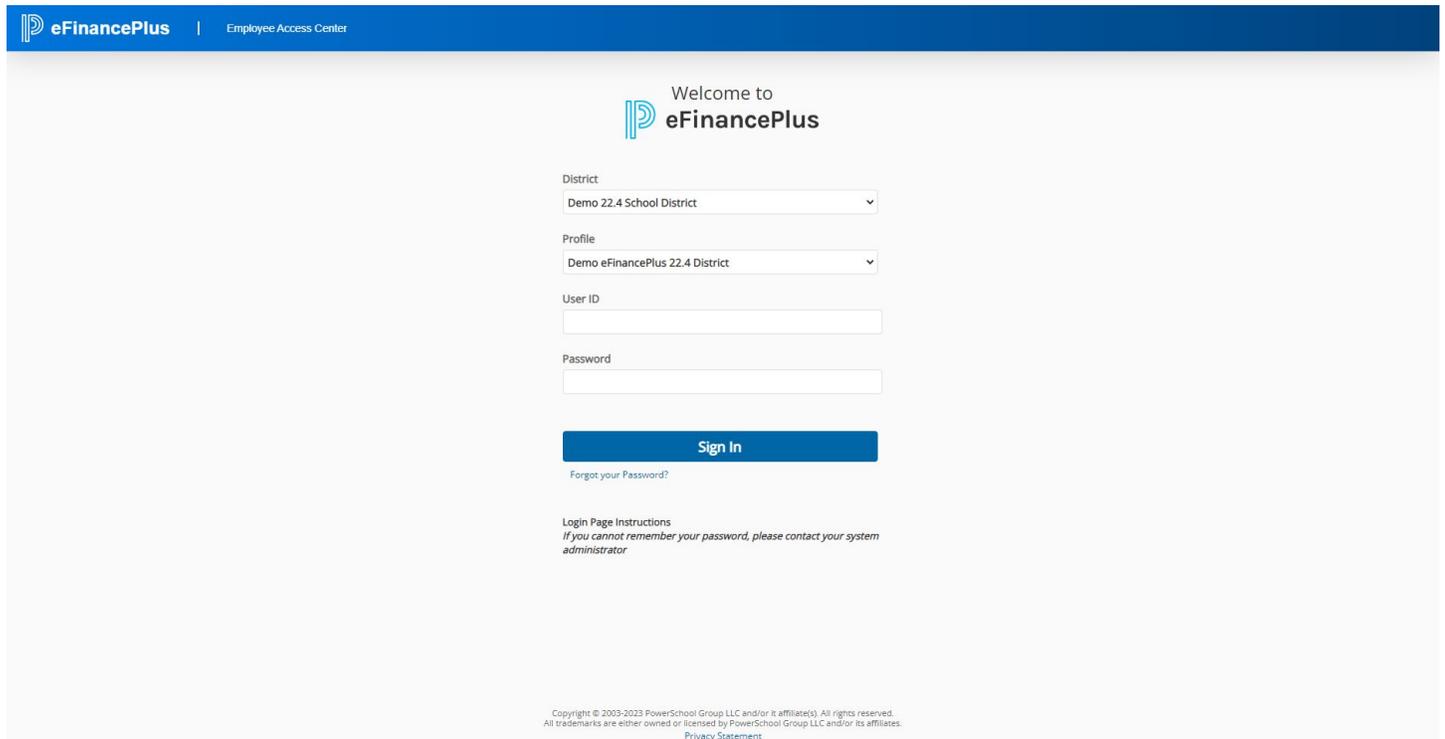
Employee Access Center provides employees with access to their payroll and personnel information anytime, anywhere through this convenient web portal. The Employee Access Center portal allows district employees to view demographics, benefit statements, benefit enrollment, attendance history, deduction/benefit 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

## Logging Into Employee Access Center

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



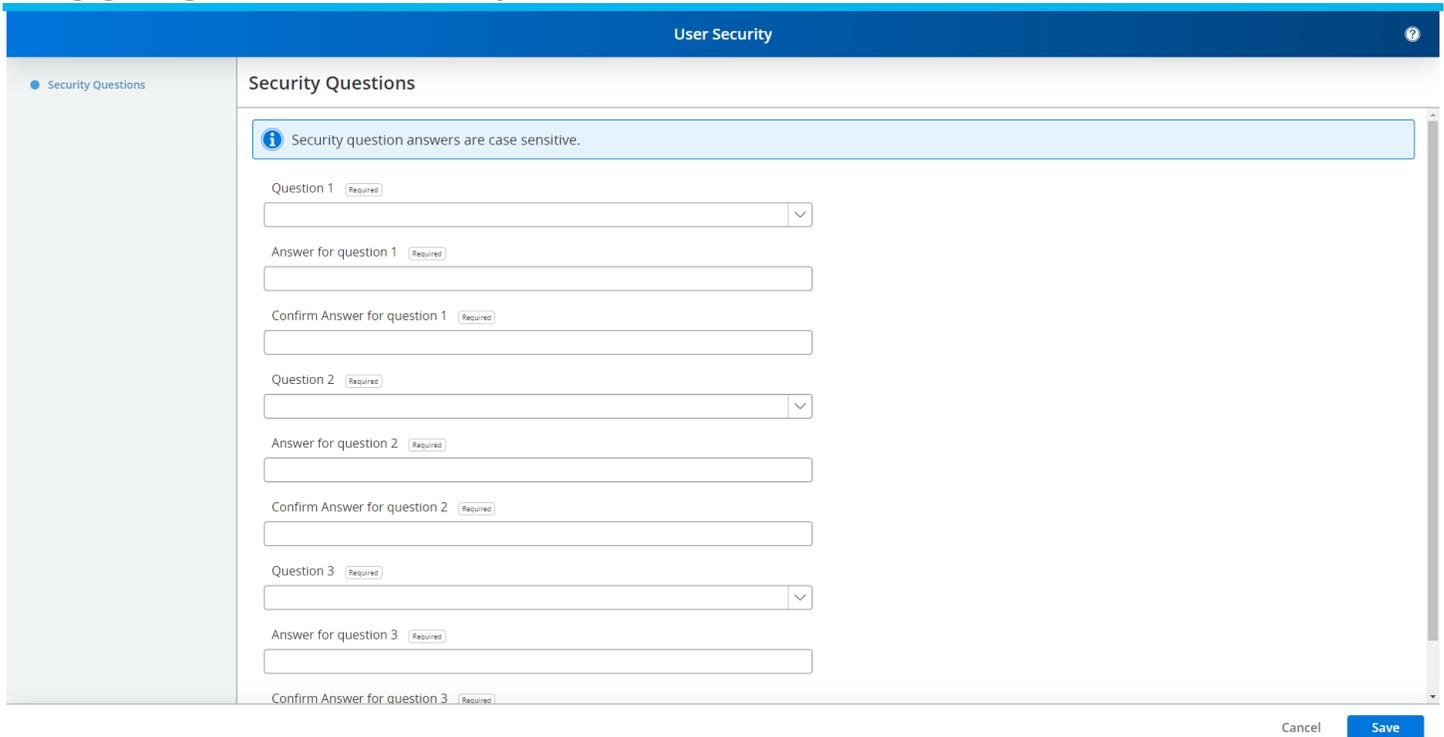
The screenshot shows the login interface for the eFinancePlus Employee Access Center. At the top, there is a blue header with the eFinancePlus logo and the text "Employee Access Center". Below the header, the page displays "Welcome to eFinancePlus" with the logo. The login form includes two dropdown menus for "District" (set to "Demo 22.4 School District") and "Profile" (set to "Demo eFinancePlus 22.4 District"). There are input fields for "User ID" and "Password". A blue "Sign In" button is positioned below the password field. A link for "Forgot your Password?" is located below the sign-in button. At the bottom of the form, there are "Login Page Instructions" and a note: "If you cannot remember your password, please contact your system administrator". The footer contains copyright information: "Copyright © 2003-2023 PowerSchool Group LLC and/or its affiliates. All rights reserved. All trademarks are either owned or licensed by PowerSchool Group LLC and/or its affiliates. Privacy Statement".

## 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



The screenshot shows the 'User Security' page with a 'Security Questions' section. A blue header bar at the top contains the text 'User Security' and a help icon. Below the header, a sidebar on the left has a 'Security Questions' link. The main content area is titled 'Security Questions' and features a blue information box stating 'Security question answers are case sensitive.' Below this, there are three sets of input fields for questions. Each set includes a dropdown menu for the question, a text input for the answer, and a text input for confirming the answer. Each input field is marked as 'Required'. At the bottom right of the form, there are 'Cancel' and 'Save' buttons.

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



District  
Demo 22.4 School District

Profile  
Demo eFinancePlus 22.4 District

User ID

Password

Sign In

[Forgot your Password?](#)

Login Page Instructions  
If you cannot remember your password, please contact your system administrator

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## User Security



- Security Questions
- Change Password

### Change Password

New Password Required

Confirm Password Required

Previous

Cancel

Save

# Personal Information Menu

## 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

**eFinancePlus**  
Employee Access Center

Personal Information

Salary and Benefits

Leave Information

Expense

Workflow Approvals

Links

Administration

## Demographic Information

[Update Information](#)

Please contact the Human Resources Department to report inaccuracies.

Employee ID	1000	Previous Last Name	
First Name	POWERSCHOOL	Preferred Name	PS SUPPORT
Middle Name		SSN	199-99-1234
Last Name	SUPPORT	Birth Date	01/01/1980
Suffix		Effective Date	06/13/2023

General Information

Address Line 1

Phone Number

## 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

**eFinancePlus**  
Employee Access Center

Personal Information  
Update Information

Please contact the Human Resources Department to report inaccuracies.

**Upload Photo**

Employee ID	1000	Previous Last Name	
First Name <small>(Required)</small>	POWERSCHOOL	Preferred Name	PS SUPPORT
Middle Name		SSN	199-99-1234
Last Name <small>(Required)</small>	SUPPORT	Birth Date	01/01/1980
Suffix		Effective Date <small>(Required)</small>	06/13/2023

Cancel **Save**

## 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.

**eFinancePlus**  
Employee Access Center

Personal Information  
Certifications and Skills / Interests

Education  
Professional Development

Please contact the Human Resources Department to report inaccuracies.

**Upload Photo**

Employee ID	1000	Previous Last Name	
First Name	POWERSCHOOL	Preferred Name	PS SUPPORT
Middle Name		SSN	199-99-1234
Last Name	SUPPORT	Birth Date	01/01/1980
Suffix		Effective Date	06/13/2023

General Information

Address Line 1 Phone Number

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.

The screenshot shows the eFinancePlus Employee Access Center interface. The main content area is titled "Certifications and Skills / Interests" and contains a sub-section for "Certifications". A message at the top of the table area reads: "Please contact the Human Resources Department to report inaccuracies." Below this is a table with the following data:

Status	Type	Area	Issue Date	Registration Date	Expiration Date	Certification Number
Active	5 YEAR PROFESSIONAL		09/01/2017		12/31/2023	457489
Active	ELEMENTARY TEACHER		07/02/2018		09/30/2023	13415

The left sidebar contains navigation options: Personal Information, Salary and Benefits, Leave Information, Expense, WorkFlow Approvals, and Links. The top navigation bar includes the eFinancePlus logo and a user profile icon labeled "TF".

# 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.

The screenshot shows the eFinancePlus Employee Access Center interface. The top navigation bar includes the eFinancePlus logo and the text 'Employee Access Center'. On the left, a vertical menu lists various options: Personal Information, Salary and Benefits, Leave Information, Expense, Workflow Approvals, Links, and Administration. The 'Personal Information' menu is expanded, showing sub-options: Demographic Information, Certifications and Skills / Interests, Education (highlighted with a red circle), and Professional Development. The main content area displays a profile card for an employee with a circular profile picture. Below the picture, there are two columns of input fields for personal information. A blue banner at the top of the main content area contains the text: 'Please contact the Human Resources Department to report inaccuracies.'

Field	Value
Employee ID	1000
First Name	POWERSCHOOL
Middle Name	
Last Name	SUPPORT
Suffix	
Previous Last Name	
Preferred Name	PS SUPPORT
SSN	199-99-1234
Birth Date	01/01/1980
Effective Date	06/13/2023

The screenshot shows the eFinancePlus Employee Access Center interface with the 'Education' page selected. The top navigation bar is the same as in the previous screenshot. The left menu is also the same. The 'Education' menu item is selected, and the sub-menu 'Continuing Education Courses' is visible. A blue banner at the top of the main content area contains the text: 'Please contact the Human Resources Department to report inaccuracies.' Below the banner is a table with the following columns: Date, Type, School, Major, Minor, Highest Degree, Credits, and GPA.

Date	Type	School	Major	Minor	Highest Degree	Credits	GPA
02/28/2010	MASTERS DEGREE	N/A				0	0.0
05/22/2006	BACHELORS OF ARTS	N/A				0	0.0

# 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.

The screenshot shows the eFinancePlus Employee Access Center interface. The top navigation bar is blue with the eFinancePlus logo and the text "Employee Access Center". On the right side of the bar are icons for home, help, and a user profile labeled "PS". A left-hand navigation menu is open, showing options: Personal Information, Salary and Benefits (highlighted), Leave Information, Expense, WorkFlow Approvals, Links, and Administration. The "Salary and Benefits" menu is expanded, listing: Contracts, Deductions and Benefits, Dependents, Payroll Checks, Salary and Benefits, Tax Forms, Tax Information, and "What If" Paycheck Calculator. The main content area displays a profile form for an employee. At the top, there is a blue banner with the text "Human Resources Department to report inaccuracies." Below this is a circular profile picture of a woman. The form contains the following fields:

Employee ID	1000	Previous Last Name	
First Name	POWERSCHOOL	Preferred Name	PS SUPPORT
Middle Name		SSN	199-99-1234
Last Name	SUPPORT	Birth Date	01/01/1980

## 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

The screenshot shows the eFinancePlus Employee Access Center interface. The left sidebar contains a menu with 'Contracts' highlighted. The main content area displays a form for entering employee information. The form includes the following fields:

Field	Value
Employee ID	1000
First Name	POWERSCHOOL
Middle Name	
Last Name	SUPPORT
Previous Last Name	
Preferred Name	PS SUPPORT
SSN	199-99-1234
Birth Date	01/01/1980

The screenshot shows the eFinancePlus Employee Access Center interface. The left sidebar contains a menu with 'Contracts' highlighted. The main content area displays an information box with instructions on how to view and sign contracts. Below the information box is a table listing contracts.

**Information Box:**

To view a contract, click on the description. Contracts that contain a checkbox in the Sign column are awaiting your review and signature. By clicking the checkbox in the Sign column and then clicking the 'Sign Contract' button, you acknowledge that you reviewed the contract and are agreeing to the terms. This constitutes a legal and binding signature.

Description	School Year	Sign By	Sign	Signature Date
Teacher Contract 22-23	2022-2023	07/15/2022	<input checked="" type="checkbox"/> Sign Checkbox	12/03/2021

## 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

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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

Human Resources Department to report inaccuracies.

Employee ID: 1000

First Name: POWERSCHOOL

Last Name: SUPPORT

SSN: 199-99-1234

Birth Date: 01/01/1980

Effective Date: 06/14/2023

**Deductions and Benefits**

[Add New Direct Deposit](#) [Update Dependents](#)

*Deductions/Benefits can be reviewed here. Changes to some deductions can only be made during Open Enrollment. Contact HR for additional guidelines.*

Status	Deduction Title	Employee Paid	Employee YTD	Employer Paid	Employer YTD
Active	CERTIFIED RETIREMENT	14.00%	\$25,316.68	14.00%	\$25,316.68
Active	CERT MEDICAL PPO - ADM	\$0.00	\$0.00	\$1870.00	\$11,220.00
Active	CERT DENTAL - ADM	\$0.00	\$0.00	\$92.00	\$552.00
Active	CERT VISION - ADM	\$0.00	\$0.00	\$12.52	\$75.12
Active	CERT LIFE - ADM	\$0.00	\$0.00	2.00%	\$35.34
Active	BANK OF AM	\$50.00	\$50.00	\$0.00	\$0.00
Active	BANK OF AM	100.00%	\$78,558.91	\$0.00	\$0.00

# Salary and Benefits

The screenshot shows the 'Deductions and Benefits' section of the eFinancePlus Employee Access Center. A modal window titled 'Add New Direct Deposit' is open, displaying an important note and a form with the following fields:

- Important Note:** This new direct deposit deduction will be saved in a batch for the payroll department to post. This will not be active immediately.
- Select Direct Deposit Option (Required):** 9997 - DIRECT DEPOSIT PER 1
- Status (Required):** Active
- Employee Paid (Required):** 0 %
- Routing Number (Required):** [Empty field]
- Account Type (Required):** Checking
- Bank Name (Required):** [Empty field]
- Account Number (Required):** [Empty field]
- Effective Date (Required):** 06/15/2023
- Confirm Account Number (Required):** [Empty field]

Buttons for 'Add Attachment', 'Cancel', and 'Add' are visible at the bottom of the modal.

The screenshot shows the 'Dependents' section of the eFinancePlus Employee Access Center. It includes an 'Add New Dependent' button and an informational message:

Please review your dependents list below, and if there are any changes, you can use the Edit links, or add a new person. There may be paperwork involved with adding/changing dependents. Once complete, use the Continue button at the bottom of the page to move forward.

Status	First Name	Last Name	Birth Date	Social Security Number	Gender	Relationship	Default Dependent
Active	JOHN	SUPPORT	05/01/2023	XXX-XX-7896	Male	Child	Yes

A 'Continue to Deductions and Benefits' button is located at the bottom of the page.

# Salary and Benefits

The screenshot displays the 'eFinancePlus Employee Access Center' interface. The main content area is titled 'Dependents' and features a 'Please review your dependent information before adding/changing dependents. Once complete, use the Continue to Deductions and Benefits button.' A modal window titled 'Add New Dependent' is open, containing the following fields:

- First Name (Required)
- Last Name (Required)
- Status (Required) - Active
- Birth Date (Required)
- Social Security Number (Required)
- Gender (Required) - Male
- Relationship (Required) - Spouse
- Street Address (Required) - 39393 RANDOM ROAD
- City (Required) - CHICAGO
- State (Required) - ILLINOIS
- Zip (Required) - 60624

Buttons for 'Cancel' and 'Add' are located at the bottom right of the modal.

## 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

The screenshot shows the eFinancePlus Employee Access Center interface. The top navigation bar includes the eFinancePlus logo and the text 'Employee Access Center'. On the right side of the header, there are icons for home, help, and a user profile labeled 'PS'. A left-hand navigation menu contains several categories: Personal Information, Salary and Benefits, Leave Information, Expense, Workflow Approvals, Links, and Administration. The 'Salary and Benefits' category is expanded, showing a dropdown menu with the following items: Contracts, Deductions and Benefits, Dependents (highlighted with a red circle), Payroll Checks, Salary and Benefits, Tax Forms, Tax Information, and 'What If?' Paycheck Calculator. The main content area displays a form for personal information, including fields for Employee ID (1000), First Name (POWERSCHOOL), Middle Name, Last Name (SUPPORT), Suffix, Previous Last Name, Preferred Name (PS SUPPORT), SSN (199-99-1234), Birth Date (01/01/1980), and Effective Date (06/14/2023). A profile picture of a woman is visible next to the form fields. A blue banner at the top of the main content area reads 'Human Resources Department to report inaccuracies.'

The screenshot shows the 'Dependents' page in the eFinancePlus Employee Access Center. The top navigation bar is the same as in the previous screenshot. The left-hand navigation menu is also the same. The main content area is titled 'Dependents' and features a blue button labeled 'Add New Dependent'. Below this is a blue information banner with a message: 'Please review your dependents list below, and if there are any changes, you can use the Edit links, or add a new person. There may be paperwork involved with adding/changing dependents. Once complete, use the Continue button at the bottom of the page to move forward.' Below the banner is a table with the following columns: Status, First Name, Last Name, Birth Date, Social Security Number, Gender, Relationship, and Default Dependent. The table contains one row of data: Status is 'Active' with a green checkmark icon, First Name is 'JOHN', Last Name is 'SUPPORT', Birth Date is '05/01/2023', Social Security Number is 'XXX-XX-7896', Gender is 'Male', Relationship is 'Child', and Default Dependent is 'Yes'. At the bottom of the page, there is a blue button labeled 'Continue to Deductions and Benefits'.

Status	First Name	Last Name	Birth Date	Social Security Number	Gender	Relationship	Default Dependent
Active	JOHN	SUPPORT	05/01/2023	XXX-XX-7896	Male	Child	Yes

# Salary and Benefits

The screenshot shows the 'Add New Dependent' form in the eFinancePlus Employee Access Center. The form is a modal window with the following fields and values:

- First Name: [Empty]
- Last Name: [Empty]
- Status: Active
- Birth Date: [Empty]
- Social Security Number: [Empty]
- Gender: Male
- Relationship: Spouse
- Street Address: 39393 RANDOM ROAD
- City: CHICAGO
- State: ILLINOIS
- Zip: 60624

Buttons for 'Cancel' and 'Add' are located at the bottom right of the form.

## 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

eFinancePlus Employee Access Center

- Personal Information
- Salary and Benefits
  - Contracts
  - Deductions and Benefits
  - Dependents
  - Payroll Checks**
  - Salary and Benefits
  - Tax Forms
  - Tax Information
  - "What If" Paycheck Calculator
- Leave Information
- Expense
- Workflow Approvals
- Links
- Administration

Human Resources Department to report inaccuracies.



Employee ID: 1000

Previous Last Name: [Redacted]

First Name: POWERSCHOOL

Preferred Name: PS SUPPORT

Middle Name: [Redacted]

SSN: 199-99-1234

Last Name: SUPPORT

Birth Date: 01/01/1980

Suffix: [Redacted]

Effective Date: 06/14/2023

General Information

Address Line 1: [Redacted] Phone Number: [Redacted]

eFinancePlus Employee Access Center

Payroll Checks

*i* New paychecks will be posted each Friday morning.

*i* Net Pay value for Direct Deposit checks shows the Net Pay before the direct deposit deduction(s).

All [Filter]

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

Items per page: 10 20 Showing 1 - 10 of 11 Page 1 of 2

# Salary and Benefits

Preview

POWERSCHOOL  
150 PARKSHORE DR.  
FOLSOM, 95630-

10/31/2020 Date V50207

Amount

Pay \*\*\*\*\*VOID CHECK\*\*\*\*\*

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

CREATED BY EMPLOYEE ACCESS CENTER

Statement of Earnings and Deductions

Earnings				Employee Deductions				Employer Contributions			
Description	Hours	Rate	Current	Year to Date	Description	Current	Year to Date	Current	Year to Date		
UNEMPLOY INS.	0.00	0.00	6,458.33	51,666.64	MEDICARE	93.45	749.23	93.45	749.23		
					FED TAX	1,265.36	10,122.88	.00	0.00		
					STATE TAX	119.49	2,157.52	.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	95.00	736.00		
					VISION	.00	.00	12.50	100.16		
					SLIP	.00	.00	5.85	47.22		
					BANK OF AM	3,875.46	31,003.68	.00	0.00		
<b>Totals</b>	<b>0.00</b>		<b>6,458.33</b>	<b>51,666.64</b>	<b>Totals</b>	<b>6,458.33</b>	<b>51,666.64</b>	<b>2,978.23</b>	<b>23,825.84</b>		

Leave	Earned	Used	End Balance
SICK	0.00	0.00	0.00
PERSONAL	0.00	0.00	0.00
VACATION	0.00	0.00	0.00
MEIC	0.00	0.00	0.00

Net Pay 3,875.48

Employee POWERSCHOOL SUPPORT

Pay Information

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

The screenshot shows the eFinancePlus Employee Access Center interface. The 'Salary and Benefits' menu item is highlighted in a red circle in the left-hand navigation menu. The main content area displays a form for entering personal information, including fields for Employee ID, First Name, Last Name, and Address. A notification banner at the top reads: "Human Resources Department to report inaccuracies."

The screenshot shows the 'Salary and Benefits' page in the eFinancePlus Employee Access Center. It includes a table of deductions and a pie chart showing the breakdown of total compensation.

Deductions	Employer Paid Annual	Employer Fiscal Year to Date	Employee Fiscal Year to Date
CERTIFIED RETIREMENT	\$0.00	\$335.42	\$335.42
CERT MEDICAL PPO - EE+FA	\$0.00	\$748.00	\$187.00
CERT DENTAL - EE+FA	\$0.00	\$87.50	\$9.20
CERT VISION - EE+FA	\$0.00	\$0.00	\$12.52
CERT LIFE - EE	\$0.00	\$3.54	\$0.00
BANK OF AM	\$0.00	\$0.00	\$1486.84
MEDICARE	\$833.75	\$34.74	\$34.74

Category	Percentage
Salary	97.14%
Other	1.43%
MEDICARE	1.43%

**Salary and Benefits Pie Chart**  
 Percentages in the chart below are based on Total Compensation.

Total Benefits Cost: \$933.75  
 Total Employee Compensation: \$57,500.00  
 Benefits as a Percentage of Earnings: 1.45%  
 Benefits as a Percentage of Total Employee Compensation: 1.43%

## 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.

The screenshot shows the eFinancePlus Employee Access Center interface. The 'Salary and Benefits' menu is open, and 'Tax Forms' is highlighted with a red circle. The main content area displays a profile for an employee with the following information:

Field	Value	Field	Value
Employee ID	1000	Previous Last Name	
First Name	POWERSCHOOL	Preferred Name	PS SUPPORT
Middle Name		SSN	199-99-1234
Last Name	SUPPORT	Birth Date	01/01/1980
Suffix		Effective Date	06/14/2023

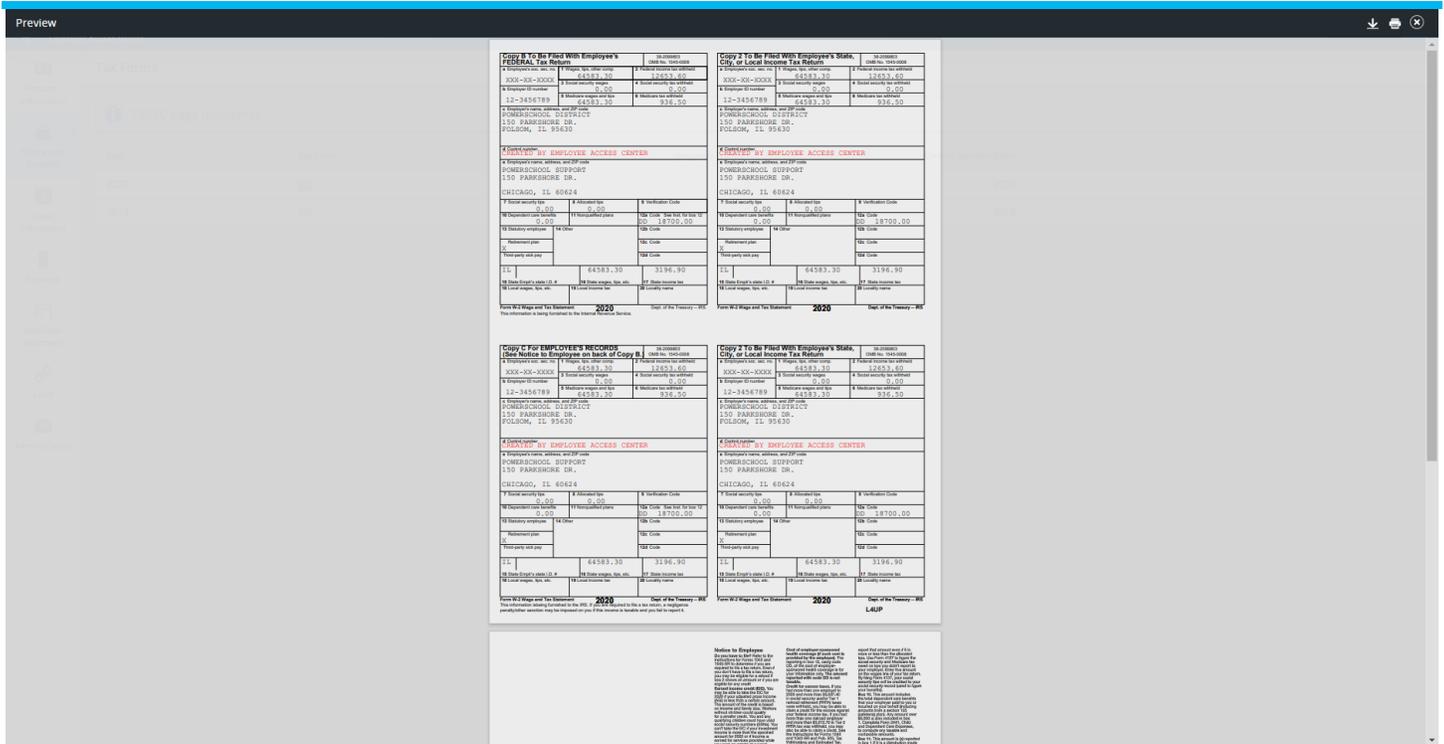
Below the profile information, there is a 'General Information' section with the following details:

Field	Value	Field	Value
Address Line 1	805 OAK AVE	Phone Number	555-555-1234
Address Line 2		Work Phone	

The screenshot shows the 'Tax Forms' page in the eFinancePlus Employee Access Center. The page displays a table of available tax forms for the years 2019 and 2020.

Year	Tax Form	Sequence Number	Control Number/Batch
2020	W2	0	2020
2019	W2	0	2019

# 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

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

# Salary and Benefits

3. Click Save.

The screenshot shows the eFinancePlus Employee Access Center interface. The left sidebar contains a navigation menu with the following items: Personal Information, Salary and Benefits, Leave Information, Expense, Workflow Approvals, Links, and Administration. The 'Salary and Benefits' menu is expanded, and 'Tax Information' is highlighted with a red circle. The main content area displays a profile for an employee with the following information:

Field	Value
Employee ID	1000
First Name	POWERSCHOOL
Middle Name	
Last Name	SUPPORT
Suffix	
Previous Last Name	
Preferred Name	PS SUPPORT
SSN	199-99-1234
Birth Date	01/01/1980
Effective Date	06/14/2023

Below the profile information, there is a section for 'General Information' with the following details:

Field	Value
Address Line 1	805 OAK AVE
Address Line 2	
Phone Number	555-555-1234
Work Phone	

The screenshot shows the 'Tax Information' form in the eFinancePlus Employee Access Center. The form is titled 'Tax Information' and includes a 'Update Tax Information' button. A message at the top states: 'Please fill out corresponding forms with your change.' The form is divided into several sections:

- General Information:**
  - Printed W2 (Required)
  - W2 in EAC Only
- Federal Tax:**
  - Message: 'Please fill out the Federal tax form and return to Human Resources office.'
  - Federal Exempt: N - Not Exempt
  - Federal Filing Status: UNKNOWN
  - W-4 Step 2 Checkbox:
  - Non Resident Alien:
  - W-4 Submission Date (Required): 01/01/2000
- Other Fields:**
  - Federal Extra Withholdings (Required): 0.00
  - Other Annual Income (Required): 0.00
  - Annual Deductions (Required): 0.00
  - Annual Tax Credit (Required): 0.00
  - Number of Pre-2020 W-4 Exemptions (Required): 0

## “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.

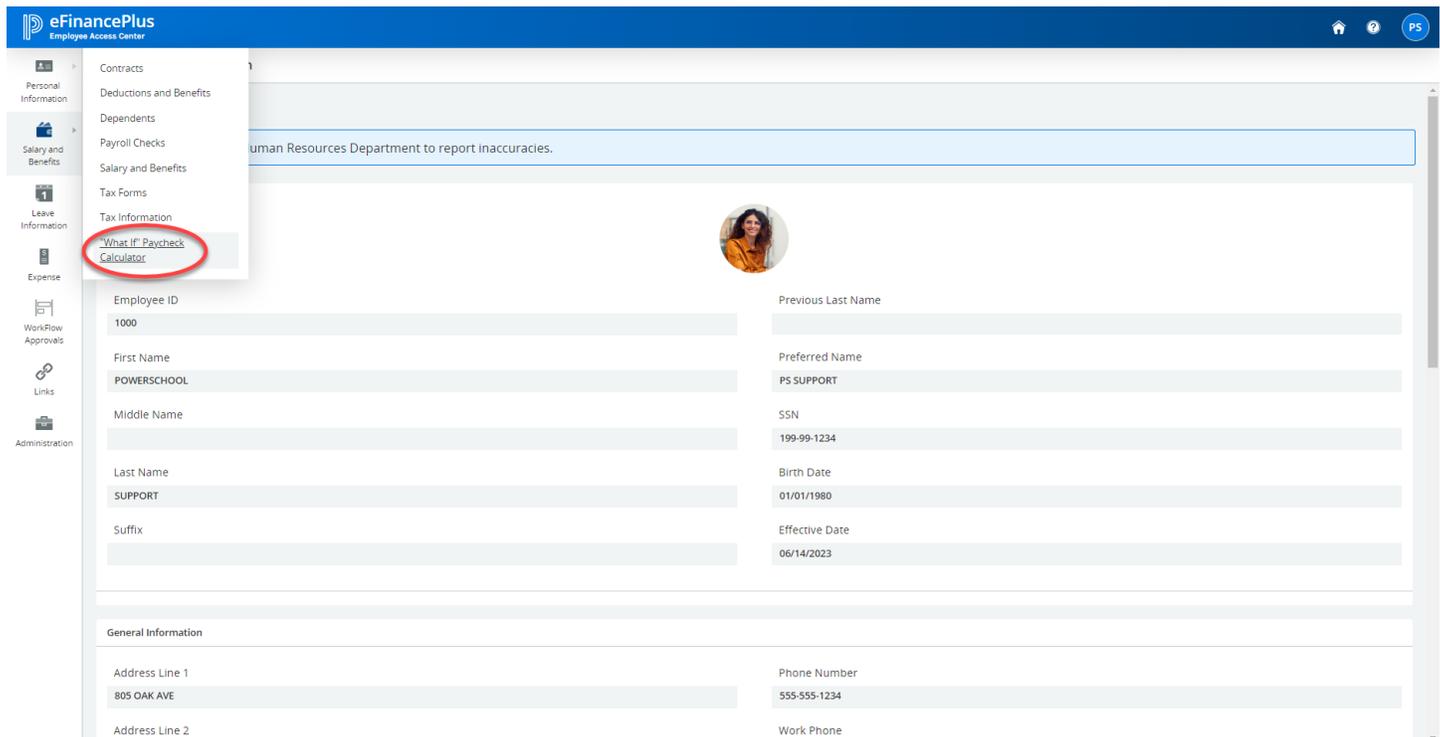
# Salary and Benefits

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

Impersonation Mode
Ashley Groves
End Impersonation

"What If" Paycheck Calculator

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

### Pay Information

Pay Description	Hours/Days	Pay Rate	Amount	Delete
TEACHER - SALARY			2395.83	
<input type="text"/>	0.0000	0.00000	0.00	🗑️
<b>Total Pay</b>			<b>\$2,395.83</b>	

Cancel Next

Impersonation Mode
Ashley Groves
End Impersonation

"What If" Paycheck Calculator

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

### Tax Information

**Federal Tax**

Federal Exempt	Federal Filing Status	W-4 Step 2 Checkbox	Other Annual Income	Annual Deductions	Annual Tax Credit	Federal Extra Withholdings
<input type="text" value="N - Not Exempt"/>	<input type="text" value="MARRIED"/>	<input type="checkbox"/> W-4 Step 2 Checkbox	0.00	0.00	0.00	25.00

**State Tax**

Tax Authority State	State Exempt	State Filing Status	State Number of Exemptions	State Extra Withholdings
<input type="text" value="IL"/>	<input type="text" value="N - Not Exempt"/>	<input type="text" value="STATE STATUS"/>	0	0.00

**Local Tax**

Tax Authority Locality	Local Exempt	Local Filing Status	Local Number of Exemptions	Local Extra Withholdings
<input type="text" value="UNKNOWN"/>	<input type="text" value="Y - Exempt no W2"/>	<input type="text"/>	0	0.00

Previous
Cancel
Next

# 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
CERTIFIED RETIREMENT	CERT RETIR	<input type="text" value="14.0000"/>		<input type="text" value="14.0000"/>		<input checked="" type="checkbox"/> Include in calculation
CERT MEDICAL PPO - ADM	MEDICAL				<input type="text" value="1870.00"/>	<input checked="" type="checkbox"/> Include in calculation
CERT DENTAL - ADM	DENTAL				<input type="text" value="92.00"/>	<input checked="" type="checkbox"/> Include in calculation
CERT VISION - ADM	VISION				<input type="text" value="12.52"/>	<input checked="" type="checkbox"/> Include in calculation
CERT LIFE - ADM	LIFE			<input type="text" value="2.0000"/>		<input checked="" type="checkbox"/> Include in calculation
DIRECT DEPOSIT AMT 1	DIR \$		<input type="text" value="50.00"/>			<input checked="" type="checkbox"/> Include in calculation
DIRECT DEPOSIT NET	DIR DEP	<input type="text" value="100.0000"/>				<input checked="" type="checkbox"/> Include in calculation
<input type="text" value=""/>	<input type="text" value=""/>					<input checked="" type="checkbox"/> Include in calculation <span style="float: right;">🗑️</span>

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
<b>TOTAL GROSS EARNINGS</b>	<b>\$6,458.33</b>
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
<b>TOTAL TAXES AND DEDUCTIONS</b>	<b>\$6,458.33</b>
	50.00
	4020.10
<b>TOTAL DIRECT DEPOSIT DEDUCTIONS</b>	<b>\$4,070.10</b>
<b>NET PAY</b>	<b>\$4,070.10</b>

Generated On 6/15/2023

Federal Tax

Previous

Cancel

Finish

# Leave Information

## 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.

**eFinancePlus**  
Employee Access Center

Personal Information  
Salary and Benefits  
**Leave Information**  
Expense  
WorkFlow Approvals  
Links  
Administration

Demographic Information

Update Information

Please contact the Human Resources Department to report inaccuracies.

Employee ID: 1000

First Name: POWERSCHOOL

Middle Name:

Last Name: SUPPORT

Suffix:

Previous Last Name:

Preferred Name: PS SUPPORT

SSN: 199-99-1234

Birth Date: 01/01/1980

Effective Date: 06/14/2023

General Information

Address Line 1: 805 OAK AVE

Address Line 2:

Phone Number: 555-555-1234

Work Phone:

# Leave Information

eFinancePlus Employee Access Center

VACATION LV 11-15 YRS

Earned YTD 0.0000 Taken YTD 5.0000 Current Balance 0.0000 Pending Leave 9.0000 Pending Balance -9.0000

Status	Leave Type	Start Date	End Date	Units	Unit Type	Notes	Attachments	Options
⊗	902 - VACATION LEAVE	08/23/2021	08/27/2021	5.0000	Days			
⊗	902 - VACATION LEAVE	08/23/2021	08/27/2021	5.0000	Days			
⊗	902 - VACATION LEAVE	08/23/2021	08/27/2021	5.0000	Days			
⊗	902 - VACATION LEAVE	08/23/2021	08/27/2021	5.0000	Days			
⊗	902 - VACATION LEAVE	08/23/2021	08/27/2021	5.0000	Days			
🕒	902 - VACATION LEAVE	11/03/2021	11/05/2021	3.0000	Days			⋮
🕒	902 - VACATION LEAVE	12/02/2021	12/03/2021	2.0000	Days			⋮
✅	902 - VACATION LEAVE	09/08/2021	09/10/2021	3.0000	Days	📎		⋮
✅	902 - VACATION LEAVE	08/20/2021	08/20/2021	1.0000	Days	📎		⋮
⊗	902 - VACATION LEAVE	11/15/2021	11/17/2021	3.0000	Days	📎		
⊗	902 - VACATION LEAVE	11/15/2021	11/19/2021	5.0000	Days	📎		
⊗	902 - VACATION LEAVE	09/22/2021	09/24/2021	3.0000	Days	📎		
⊗	902 - VACATION LEAVE	09/13/2021	09/17/2021	5.0000	Days			
⊗	902 - VACATION LEAVE	11/01/2021	11/02/2021	2.0000	Days			
⊗	902 - VACATION LEAVE	11/22/2021	11/24/2021	3.0000	Days	📎		
⊗	902 - VACATION LEAVE	10/22/2021	10/22/2021	1.0000	Days			
⊗	902 - VACATION LEAVE	10/28/2021	10/29/2021	2.0000	Days			
⊗	902 - VACATION LEAVE	08/25/2021	08/31/2021	5.0000	Days			
✅	902 - VACATION LEAVE	09/08/2021	09/10/2021	3.0000	Days	📎		
✅	902 - VACATION LEAVE	08/20/2021	08/20/2021	1.0000	Days	📎		

## 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.

eFinancePlus Employee Access Center

VACATION LV 11-15 YRS

Earned YTD 0.0000 Taken YTD 5.0000 Current Balance 0.0000 Pending Leave 9.0000 Pending Balance -9.0000

Status	Leave Type	Start Date	End Date	Units	Unit Type	Notes	Attachments	Options
⊗	902 - VACATION LEAVE	08/23/2021	08/27/2021	5.0000	Days			
⊗	902 - VACATION LEAVE	08/23/2021	08/27/2021	5.0000	Days			
⊗	902 - VACATION LEAVE	08/23/2021	08/27/2021	5.0000	Days			
⊗	902 - VACATION LEAVE	08/23/2021	08/27/2021	5.0000	Days			
⊗	902 - VACATION LEAVE	08/23/2021	08/27/2021	5.0000	Days			
🕒	902 - VACATION LEAVE	11/03/2021	11/05/2021	3.0000	Days			⋮
🕒	902 - VACATION LEAVE	12/02/2021	12/03/2021	2.0000	Days			⋮
✅	902 - VACATION LEAVE	09/08/2021	09/10/2021	3.0000	Days	📎		⋮
✅	902 - VACATION LEAVE	08/20/2021	08/20/2021	1.0000	Days	📎		⋮
⊗	902 - VACATION LEAVE	11/15/2021	11/17/2021	3.0000	Days	📎		
⊗	902 - VACATION LEAVE	11/15/2021	11/19/2021	5.0000	Days	📎		
⊗	902 - VACATION LEAVE	09/22/2021	09/24/2021	3.0000	Days	📎		
⊗	902 - VACATION LEAVE	09/13/2021	09/17/2021	5.0000	Days			
⊗	902 - VACATION LEAVE	11/01/2021	11/02/2021	2.0000	Days			
⊗	902 - VACATION LEAVE	11/22/2021	11/24/2021	3.0000	Days	📎		
⊗	902 - VACATION LEAVE	10/22/2021	10/22/2021	1.0000	Days			
⊗	902 - VACATION LEAVE	10/28/2021	10/29/2021	2.0000	Days			
⊗	902 - VACATION LEAVE	08/25/2021	08/31/2021	5.0000	Days			
✅	902 - VACATION LEAVE	09/08/2021	09/10/2021	3.0000	Days	📎		
✅	902 - VACATION LEAVE	08/20/2021	08/20/2021	1.0000	Days	📎		

# Leave Information

[← Back to Leave List](#) Leave Request Details

---

**Leave Information**

---

**General Information**

---

Earned YTD: 0.0000	Taken YTD: 5.0000	Current Balance: 0.0000	Pending Leave: 9.0000	Pending Balance: -9.0000
--------------------	-------------------	-------------------------	-----------------------	--------------------------

---

Leave Type Required  
902 - VACATION LEAVE

Start Date Required 11/3/2021    End Date Required 11/5/2021    Days Required 3.0000

Notes

Characters Remaining: 500

---

**Attachments**

[Add Attachments](#)

---

**Leave Request History**

*No activity after the request was submitted.*

[Cancel Leave Request](#) [Submit](#)

## 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

**eFinancePlus**  
Employee Access Center

Home Help PS

**Demographic Information**

Update Information

Please contact the Human Resources Department to report inaccuracies.



Employee ID: 1000

Previous Last Name: [Empty]

First Name: POWERSCHOOL

Preferred Name: PS SUPPORT

Middle Name: [Empty]

SSN: 199-99-1234

Last Name: SUPPORT

Birth Date: 01/01/1980

Suffix: [Empty]

Effective Date: 06/14/2023

---

**General Information**

Address Line 1: 805 OAK AVE

Phone Number: 555-555-1234

Address Line 2: [Empty]

Work Phone: [Empty]

**eFinancePlus**  
Employee Access Center

Home Help PS

**Leave List**

List Calendar

Create Leave Request

**SICK LV CLASS 15+ YRS**

Earned YTD	Taken YTD	Current Balance	Pending Leave	Pending Balance
0.0000	0.0000	33.0000	2.0000	31.0000

Status	Leave Type	Start Date	End Date	Units	Unit Type	Notes	Attachments	Options
	900 - SICK LEAVE	11/18/2021	11/19/2021	2.0000	Days			...
	900 - SICK LEAVE	08/18/2021	08/19/2021	2.0000	Days			

**PERSONAL LEAVE**

Earned YTD	Taken YTD	Current Balance	Pending Leave	Pending Balance
0.0000	0.0000	0.0000	2.0000	-2.0000

Status	Leave Type	Start Date	End Date	Units	Unit Type	Notes	Attachments	Options
	901 - PERSONAL LEAVE	02/24/2022	02/25/2022	2.0000	Days			...
	901 - PERSONAL LEAVE	01/13/2022	01/14/2022	2.0000	Days			
	901 - PERSONAL LEAVE	09/03/2021	09/03/2021	1.0000	Days			
	901 - PERSONAL LEAVE	09/16/2021	09/17/2021	2.0000	Days			

**VACATION LV 11-15 YRS**

Earned YTD	Taken YTD	Current Balance	Pending Leave	Pending Balance
0.0000	5.0000	0.0000	9.0000	-9.0000

Status	Leave Type	Start Date	End Date	Units	Unit Type	Notes	Attachments	Options
	902 - VACATION LEAVE	08/23/2021	08/27/2021	5.0000	Days			
	902 - VACATION LEAVE	08/23/2021	08/27/2021	5.0000	Days			

# Leave Information

The screenshot displays the eFinancePlus Employee Access Center interface. The main content area shows the 'Leave List' with three sections: SICK LV CLASS 15+ YRS, PERSONAL LEAVE, and VACATION LV 11-15 YRS. Each section contains a table with columns for Status, Leave Type, Start Date, End Date, Units, and Unit Type. A 'Create Leave Request' modal form is overlaid on the screen, featuring a dropdown for 'Leave Type \*', input fields for 'Start Date \*', 'End Date \*', and 'Units \*', a 'Notes' text area, and buttons for 'Upload Attachments', 'Cancel', and 'Submit'.

SICK LV CLASS 15+ YRS					
Earned YTD	0.0000	Current Balance	33.0000		
Status	Leave Type	Start Date	End Date	Units	Unit Type
🔄	900 - SICK LEAVE	11/18/2021			
⊗	900 - SICK LEAVE	08/18/2021			

PERSONAL LEAVE					
Earned YTD	0.0000	Taken YTD	0.0000	Current Balance	0.0000
Status	Leave Type	Start Date	End Date	Units	Unit Type
🔄	901 - PERSONAL LEAVE	02/24/2021			
🔴	901 - PERSONAL LEAVE	01/13/2021			
⊗	901 - PERSONAL LEAVE	09/03/2021	09/03/2021	1.0000	Days
⊗	901 - PERSONAL LEAVE	09/16/2021	09/17/2021	2.0000	Days

VACATION LV 11-15 YRS									
Earned YTD	0.0000	Taken YTD	5.0000	Current Balance	0.0000	Pending Leave	9.0000	Pending Balance	-9.0000
Status	Leave Type	Start Date	End Date	Units	Unit Type				
🔴	902 - VACATION LEAVE	08/23/2021	08/27/2021	5.0000	Days				
⊗	902 - VACATION LEAVE	08/23/2021	08/27/2021	5.0000	Days				

## 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

eFinancePlus  
Employee Access Center
P5

**Leave List**

List: Calendar

[Create Leave Request](#)

View 2021 - 2022

**Leave Detail for 09/08/2021**

Leave Type	Start Date	End Date	Units	Status	Notes
902 - VACATION LEAVE	09/08/2021	09/10/2021	3.0000 Days	Approved	
902 - VACATION LEAVE	09/08/2021	09/10/2021	3.0000 Days	Taken	

- WORK DAY
- NON WORK DAY
- HOLIDAY
- WEEKEND DAY
- WEEKEND WORKING DAY
- PENDING LEAVE
- PERSONAL LEAVE
- MISC - OTHER
- SICK LV CLASS 15+ YRS
- VACATION LV 11-15 YRS

August 2021							September 2021							October 2021							November 2021							December 2021							January 2022							February 2022																																																														
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S																																																								
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31					1	2	3	4	5	6		7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				

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# Expense

## 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.

The screenshot shows the 'Demographic Information' page in the eFinancePlus Employee Access Center. The page has a blue header with the eFinancePlus logo and 'Employee Access Center' text. A navigation sidebar on the left includes icons for Personal Information, Salary and Benefits, Leave Information, Expense (highlighted with a red circle), Workflow Approvals, Links, and Administration. The main content area features a 'Demographic Information' section with an 'Update Information' button and a message: 'Please contact the Human Resources Department to report inaccuracies.' Below this is a profile picture and a form with the following fields:

Employee ID	1000	Previous Last Name	
First Name	POWERSCHOOL	Preferred Name	PS SUPPORT
Middle Name		SSN	199-99-1234
Last Name	SUPPORT	Birth Date	01/01/1980
Suffix		Effective Date	06/14/2023

Below the demographic information is a 'General Information' section with the following fields:

Address Line 1	805 OAK AVE	Phone Number	555-555-1234
Address Line 2		Work Phone	

## 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

The screenshot shows the 'Expense List' page in the eFinancePlus system. The page header includes the eFinancePlus logo and 'Employee Access Center'. A sidebar on the left contains navigation links for Personal Information, Salary and Benefits, Leave Information, Expense (highlighted), WorkFlow Approvals, Links, and Administration. The main content area features a 'Create Expense Request' button at the top left, which is circled in red. Below the button is a table with columns: Status, Expense Report ID, Expense Type, Description, Creation Date, Expense Amount, Attachments, and Options. The table contains 18 rows of expense data. At the bottom of the table, there is a pagination control showing '1 - 10' and a page number '1' in a blue circle.

Status	Expense Report ID	Expense Type	Description	Creation Date	Expense Amount	Attachments	Options
❌	EX000001	Travel/Conference	PS Edge Conference	08/23/2021	\$50.00		
❌	EX000002	Travel/Conference	Prof Development	08/24/2021	\$0.00		
✅	EX000004	Travel/Conference	Prof Development	09/16/2021	\$45.00		
❌	EX000005	Travel/Conference	s	09/16/2021	\$45.00		
✅	EX000008	Travel/Conference	SNUG Conference	10/05/2021	\$159.99		
✅	EX000009	Travel/Conference	TRAVEL TO SNUG CONFERENCE	10/27/2021	\$150.00		
✅	EX000010	Travel/Conference	Client Travel	10/29/2021	\$52.50		
✅	EX000011	Tuition	school fees	11/30/2021	\$500.00		
❌	EX000017	Travel/Conference	test	12/20/2021	\$15.00		
❌	EX000018	Travel/Conference	test 2	12/20/2021	\$40.00		

## 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.

This screenshot is identical to the one above, showing the 'Expense List' page. The 'Create Expense Request' button is circled in red. The table below it lists 18 expense entries with their respective statuses, IDs, types, descriptions, dates, and amounts.

Status	Expense Report ID	Expense Type	Description	Creation Date	Expense Amount	Attachments	Options
❌	EX000001	Travel/Conference	PS Edge Conference	08/23/2021	\$50.00		
❌	EX000002	Travel/Conference	Prof Development	08/24/2021	\$0.00		
✅	EX000004	Travel/Conference	Prof Development	09/16/2021	\$45.00		
❌	EX000005	Travel/Conference	s	09/16/2021	\$45.00		
✅	EX000008	Travel/Conference	SNUG Conference	10/05/2021	\$159.99		
✅	EX000009	Travel/Conference	TRAVEL TO SNUG CONFERENCE	10/27/2021	\$150.00		
✅	EX000010	Travel/Conference	Client Travel	10/29/2021	\$52.50		
✅	EX000011	Tuition	school fees	11/30/2021	\$500.00		
❌	EX000017	Travel/Conference	test	12/20/2021	\$15.00		
❌	EX000018	Travel/Conference	test 2	12/20/2021	\$40.00		

# Expense

Expense Report Entry  
EX000034

General Information

Name <small>Required</small> POWERSCHOOL SUPPORT	Department <small>Required</small> ADMINISTRATION
Expense Type <small>Required</small> [Dropdown]	Location BUSINESS OFFICE
Description <small>Required</small> [Text]	Start Date <small>Required</small> [Date Picker] End Date <small>Required</small> [Date Picker]
Destination City [Text]	Destination State [Text]
Fiscal Year <small>Required</small> 2022 - 2023	Form Type <small>Required</small> Expense
Status <small>Required</small> Not Submitted	Vendor Number 20000

Cancel Save & Submit

## 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		
<b>Totals</b>				\$0.00	\$159.99								
<b>Total Reimbursable Amount</b>													\$159.99
<b>Total Advance Amount</b>													\$0.00
<b>Total Amount Due to Employee</b>													\$159.99

# Links

# 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.

The image shows two screenshots of the eFinancePlus Employee Access Center interface. The top screenshot displays the 'Demographic Information' page, and the bottom screenshot displays the 'Links' page.

**Demographic Information Page:**

- Header: eFinancePlus Employee Access Center
- Left Navigation: Personal Information, Salary and Benefits, Leave Information, Expense, WorkFlow Approvals, **Links** (highlighted with a red circle), Administration.
- Page Title: Demographic Information
- Buttons: Update Information
- Message: Please contact the Human Resources Department to report inaccuracies.
- Employee Profile: Includes a profile picture and a list of fields: Employee ID (1000), First Name (POWERSCHOOL), Middle Name, Last Name (SUPPORT), Suffix, Previous Last Name, Preferred Name (PS SUPPORT), SSN (199-99-1234), Birth Date (01/01/1980), and Effective Date (06/14/2023).
- Section: General Information
- Fields: Address Line 1 (805 OAK AVE), Address Line 2, Phone Number (555-555-1234), and Work Phone.

**Links Page:**

- Header: eFinancePlus Employee Access Center
- Left Navigation: Personal Information, Salary and Benefits, Leave Information, Expense, WorkFlow Approvals, **Links** (highlighted), Administration.
- Page Title: Links
- Filter: Filter
- Table:

Title
PowerSchool Community
Benefits Provider