Employee Access Overview

Section Topics

- Homepage
- My Info
- Pay & Tax
- Tasks & Documents
- Time Off
- Benefits

The Homepage is the landing page for Employee Access. It provides a snapshot of the employee's leave plans, latest paycheck, upcoming time off, benefits information, expense reimbursements, handbooks, calendars, and tax information as well as any announcements and resources provided by the district. Details include latest time sheet (for hourly employees) and time entry tools if the District uses Daily Time Entry. The Employee Access Homepage may look different for each employee, depending on what is designated to show for the employee and the modules setup to show for the district.

Most schools provide the Employee Access link from the school's website and this provides a consistent way for each employee to use it. It can be launched in other ways too, but this is the most efficient.

Before an employee can access Employee Access, they must register within the portal by providing the following:

- Employee's Email
- Social Security Number
- Birthdate
- Zip Code

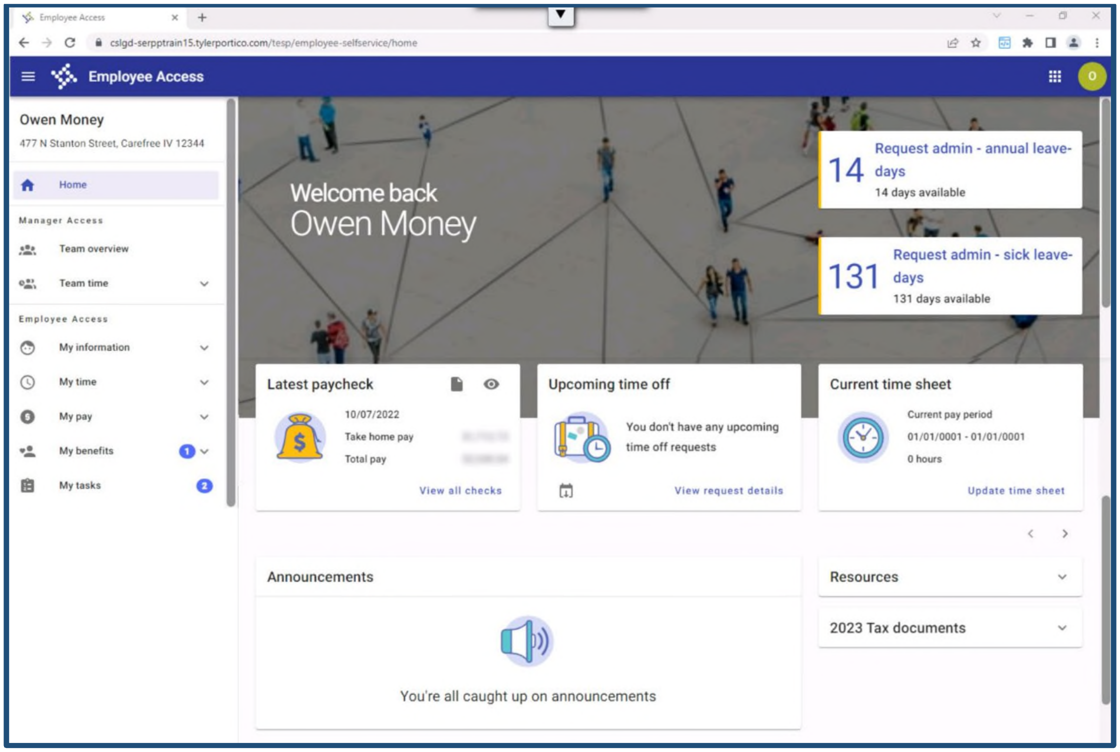
Once the employee provides their information, School ERP Pro validates the user's data with their Employee Maintenance record. Once validated, the user's Employee Access Homepage displays.

When a user successfully registers in Employee Access, the User Identifier displays in Employee Maintenance on the Employee Access tab.

> The User Identifier is blank until they sign up, therefore, it can be used to indicate if an employee has registered in Employee Access.

EXPLORE EMPLOYEE ACCESS HOMEPAGE

Take the time to familiarize yourself with the Homepage.



The following areas may be available, depending on the options the District has enabled:

AREA	DESCRIPTION
My Information	From the Employee My Info > Profile page, view and update Personal Information, Emergency Contacts, Dependents, and view Achievements (Education & Credentials). The My Info profile page contains four tabs: General, Emergency Contacts, Dependents, and Achievements.
My Pay	Pay & Tax provides access to personal payroll-related information (e.g., Calendar to Date Earnings Statement, Total Compensation Statement, Tax Forms, and Employee W2s) employees can review via the web. The Pay & Tax page contains three tabs: Overview, Year-to-Date, and Compensation Statement.

AREA	DESCRIPTION
My Tasks	My Tasks allows employees to accept or complete pending, actionable task items, and review other custom content provided by their employer. Employees can view outstanding tasks and history of completed tasks.
My Time	The Time Off resource allows employees to request time off and view leave transactions.
My Benefits	An employee can view their current benefits selections and enter the Open Enrollment process from the Benefits menu. Benefits are available only to districts that have purchased the Benefits Enrollment Module.

The Homepage has several options:

In Guide: Request Admin-Annual-Leave-Days

FEATURE	DESCRIPTION
Leave Plan	From the Homepage, view Leave Plans by clicking the Request Leave Plan card. The Time off page displays. Review the Balance and click Show breakdown to get an at-a-glance look at all the employee's leave plans and available units.
Latest Paycheck	The Latest paycheck card displays the date of the most recent paycheck or direct deposit receipt. - To view the direct deposit receipt or paycheck as a .pdf, click **View Paycheck**. - To view the Take Home Pay and Total Pay, click the **Show Paycheck** icon. - Click **View All Checks** to navigate to the Pay & Tax page.
Upcoming Time Off	The Upcoming Time Off card displays each leave request in progress, including the request's Leave Plan name and date(s). - Use the arrows in the upper right to navigate through each request. - To see more detail for each request, click the **View Request Details** link. Click the calendar icon to add the request as an iCalendar Appointment.

FEATURE	DESCRIPTION
Announcements	Review any district-related Announcements. Announcements can be date sensitive, contain hyperlinks, and have Important statuses. Announcements are added and maintained by the Announcement Admin. Announcements can be added or changed daily to keep employees informed of special events for them or the students to be aware of.
Resources	Most employees use Resources to locate documents or website links the district has provided. To access more, or to input and approve workflow items via the School ERP Pro web portal solution, the best and most secure way for employees to access Cloud workflow functionality is through the direct URL provided by Tyler IT/Local District IT so entry is authenticated. - The Web Portal provides access for working with Requisitions, Student Activity, Human Resources, Payroll, etc. - Expense Reimbursements, if purchased, is listed as a separate item under Resources to enter employee reimbursements and process them through the system to be paid.

VIEW LEAVE PLAN DETAILS

In Guide: Request Admin-Annual-Leave-Days

Steps:

1. From the Homepage, click the Leave Plan card. The Time off page displays. The balance of leave displays.

The Leave Plan card is an invaluable feature within Employee Access that provides a breakdown of the employee's leave plans and available units!

2. Click **Show Breakdown** to view the leave plans and available units.

CREATE A LEAVE REQUEST

Steps:

In Guide: Request Admin-Annual-Leave-Days

1. From the Homepage, click the **Request Admin-Annual Leave-Days** card. The Time off page displays. The balance of leave displays.
2. Click **Show Breakdown** to view the employee's leave plans and available units.
3. From the **Request Time Off Type** dropdown, select the type of time off needed.
4. Enter a **Comment** for the leave requested.
5. From the **Specific Use** dropdown, select **General**, etc.

Note, not all leave plan requests require Specific Use entries.

6. On the **Calendar**, select the date.
7. Click **Submit** to send the request to the approval queue. The request displays beneath Upcoming Time Off card with a status of In Progress.

Users can add requests to their calendar or delete a request, as applicable, from the Upcoming Time Off card.

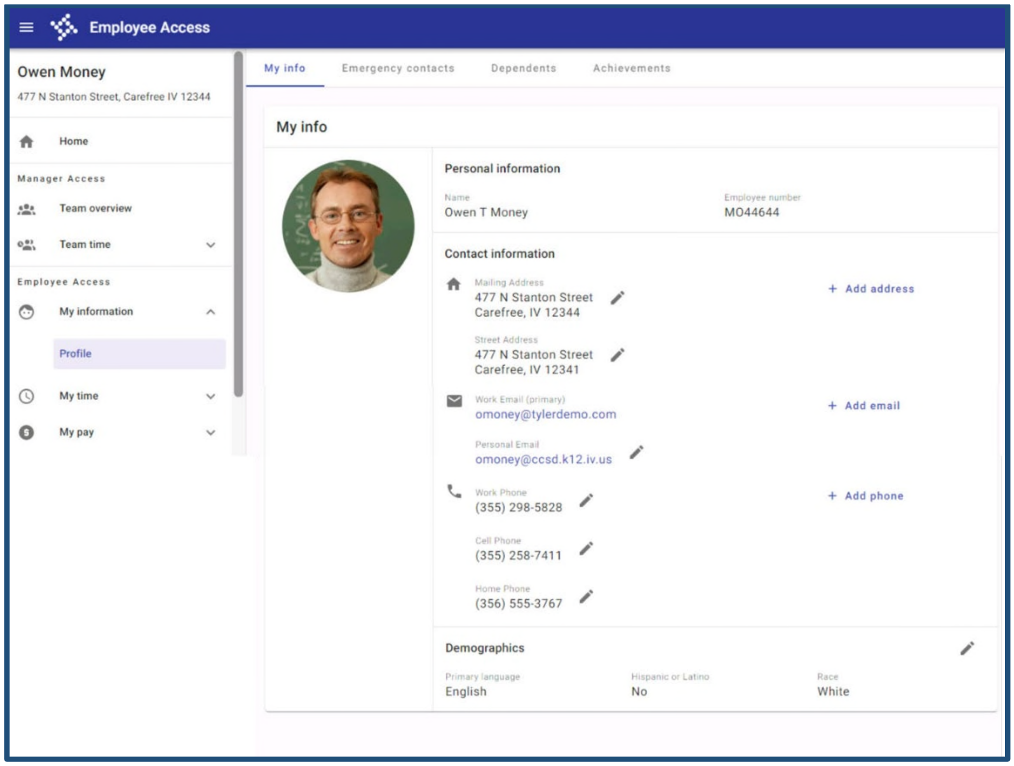
The Upcoming time off is also available directly from the Homepage.

8. Click **Home** to return to the Homepage.

MY INFO

Employee Access > My Info > Profile

From the Employee My Info > Profile page, view and update Personal Information, Emergency Contacts, Dependents, and view Achievements (Education & Credentials).



The My Info profile page contains four tabs:

TAB	DESCRIPTION
General	The opening tab for My Info > Profile displays the employee's Personal Information, Contact Information, and Employee Demographics
Emergency Contacts	The Emergency Contacts tab displays the current emergency contacts on file with the district. View, update, and delete existing contact information. Add a new contact as necessary.
Dependents	The Dependents tab displays current dependents on file with the district. View, update, and delete, as necessary. By default, SSN's are hidden. Click the Show SSN icon to display the dependent's SSN.
Achievements	The Achievements tab displays the employee's Certifications, Education, and Coursework.

Update the Employee Basic Profile

Steps:

1. From within Employee Access, navigate to **My Info > Profile**.
2. From this point, you can edit the Personal Information, Contact Information, and Employee Demographics.

3. Click within the field to be edited and enter the new information.
4. Click **Submit** to save the new information and submit it to Payroll and Human Resources for posting.

Update Emergency Contacts

Steps:

1. From within Employee Access, navigate to **My Info > Profile**.
2. Click the **Emergency Contacts** tab. The Emergency Contacts tab displays the current emergency contacts on file with the district.
3. To edit an existing contact's information, click within the field needing to be updated and enter the new information.
4. To delete an existing contact, highlight it and click the **Delete** icon.
5. To add a new contact, click **Add Emergency Contact**. The New Emergency Contact window displays.
6. Enter the contact's information and click **Submit** to send pending changes to Payroll and Human Resources.

Update Dependents

Steps:

1. From within Employee Access, navigate to **My Info > Profile**.
2. Click the **Dependents** tab. The Dependents tab displays the current employee dependents on file with the district.
3. To edit an existing dependent's information, click within the field needing to be updated and enter the new information.
4. To delete an existing dependent, highlight it and click the **Delete** icon.
5. To add a new dependent, click **Add Dependent**. The New Dependent window displays.
6. Enter the person's information and click **Submit** to send pending changes to Payroll and Human Resources.

> The dependent's SSN is hidden by default. Click **Show SSN** to view a dependent's social security number.

View Achievements, Education, Coursework, Certifications

Steps:

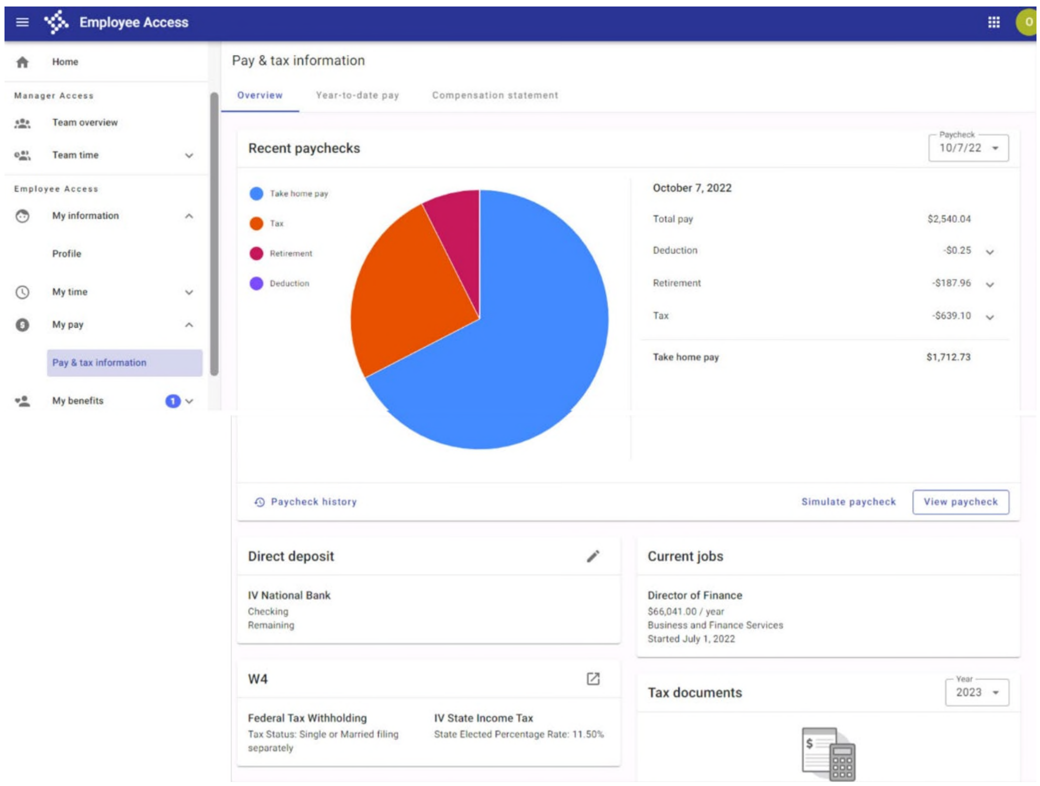
1. From within Employee Access, navigate to **My Info > Profile**.

2. Click the **Achievements** tab. The Achievements tab displays the current Certificates, Endorsements, and Education on file with the district.
3. Click **View Endorsements** or **View Coursework** to display the endorsements and coursework on file with the district.

MY PAY

Employee Access > My Pay > Pay & Tax

Pay & Tax provides access to personal payroll-related information (e.g., Calendar to Date Earnings Statement, Total Compensation Statement, Tax Forms, and Employee W2s) employees can review via the web.



The Pay & Tax page contains three tabs:

TAB	DESCRIPTION
Overview	The Overview tab displays paycheck information, current primary job(s), direct deposit information, and tax information
Year-to-Date	The Year-To-Date tab displays pay and deductions up to the current date. Limit information by take home pay, total pay, or deductions.
Compensation Statement	The Compensation tab displays employee paid compensation, employer-paid benefits, and leave balance(s) value.

View Recent Paychecks

Employee Access > My Pay > Pay & Tax > Overview

Employees can view their current direct deposit setup, current primary job(s), W4 information, and tax documents.

Steps:

1. Navigate to Employee Access > My Pay > Pay & Tax > Overview > Recent Paychecks card.
2. In the Recent Paychecks card, select the pay date from the **Paycheck** dropdown. A My Pay At-a-Glance chart and paycheck breakdown display.
3. Click **View Paycheck** to view a printable direct deposit receipt or copy of the paycheck.

Simulate Pay with the Simulate Paycheck Utility

Employee Access > My Pay > Pay & Tax > Overview

Use the Simulate Paycheck Utility to create "What if" scenarios to see how changes to taxes and deduction/benefit information could impact overall paycheck totals.

Steps:

1. Navigate to **Employee Access > My Pay > Pay & Tax > Overview**.
2. Beneath Recent Paychecks, click **Simulate Paycheck**. The Paycheck Simulator window displays.
3. Scroll to the bottom of the page and click **Calculate**. Note the results at the top of the page, paying close attention to amounts listed currently.
4. Now, you can alter the **# of Federal Allowances** field, among others, to set up the simulation.
5. Scroll to the bottom of the page and click **Calculate**. The simulated paycheck displays.

View Direct Deposit Information

Employee Access > My Pay > Pay & Tax > Overview

Employees use the Direct Deposit card to review any current direct deposit setup.

Steps:

1. Navigate to **Employee Access > My Pay > Pay & Tax > Overview**.
2. From the Direct Deposit card, click **Edit** to make changes to an existing direct deposit record.

3. To add an account, click **Add Account** and enter the new bank information.
4. Enter the **Bank Name**, **Routing Number**, and **Account Number**.
5. Enter the **Account Type**.
6. To designate a portion of the paycheck only for deposit to this account, mark the **Amount** checkbox and enter the **Amount** to be deposited out of the paycheck.
7. Click **Save** to send the new information to Payroll.

Until the request is approved/rejected pending changes cannot be edited.

Once a Direct Deposit request is submitted, Payroll is notified by email and approves/rejects requests, as appropriate.

Employees are notified by email if their request is approved. Email alerts must be set as Active in School ERP Pro > Security > Workflow Configuration > Email Alerts and Jobs.

Current Jobs

Employee Access > My Pay > Pay & Tax > Overview

The Current Jobs card displays the employee's primary position(s). If the employee is assigned to a salaried work agreement position, the card shows the position description, annual salary, and positions start date. If the employee is assigned to an hourly position, the card displays the position description, hourly rate, assigned department, and position start date.

W-4

Employee Access > My Pay > Pay & Tax > Overview

The W-4 card allows employees to review their current filing status and submit changes to their tax withholding information. They also have access to Federal and State tax forms.

Submit a Tax Change via W-4

Often, employees need to update their tax information due to life event changes. The portal simplifies this process.

Steps:

1. Navigate to **Employee Access > My Pay > Pay & Tax > Overview**.
2. From the **W-4** card, review your tax selections.
3. To edit the W-4, click **Edit**. The Employee Withholding Resource Center displays.

4. Click **Let Me Choose**.
5. Click **Federal W-4 Employee's Withholding Allowance Certificate**.
6. Answer the question: Are you a nonresident alien?
7. Click **Next**.
8. If exempt from **Federal Withholding**, select **Yes**. If not, select **No**. Click **Next**.
9. Select how you are filing: Married Filing Jointly, Single, Married Filing Separately, etc. Click **Next**.
10. Complete the Personal Allowances Spreadsheet, as applicale. To skip this section, select **None of the Above**. Click **Next**.
11. Mark **Yes** to claim dependents and click **Next**. Mark **No** if not wanting to claim dependents.
12. Enter the number of dependents.
13. For **Additional Amount**, enter the amount to be withheld in addition to the amount the system calculates as withholding.
14. Click **Next**.
15. Mark the **Under Penalties of Perjury Statement** checkbox and enter the last four digits of your social security number.
16. Click **Submit Form**. Review the form.
17. Click **Sign Out** to exit the session. Click the **X** on the tab to close the window.

Tax Documents

Employee Access > My Pay > Pay & Tax > Overview

The Tax Documents card displays all published W-2s. Click the **Year** dropdown to view the selected tax year's W-2. The W-2 displays, prints, and saves as a .pdf.

Year-to-Date tab

Employee Access > My Pay > Pay & Tax > Year-to-Date

The Year-to-Date tab displays a summary statement of Earnings, Employee Deductions, and Employer Paid Benefits for the current year. From the **View** dropdown, select Take Home Pay, Total Pay, or Deductions to display the different pay categories.

Compensation Statement tab

Employee Access > My Pay > Pay & Tax > Compensation Statement

The Compensation Statement tab displays the total compensation paid to the employee by the district. The Statement details explain that the tab includes wages, employer paid benefits, and an estimated value of any leave plan balances that would be paid out in the event the employee leaves the district.

The Statement information displays the employee's position, department, and last updated date.

View the Total Compensation View Selections

Employee Access > My Pay > Pay & Tax > Compensation Statement

Steps:

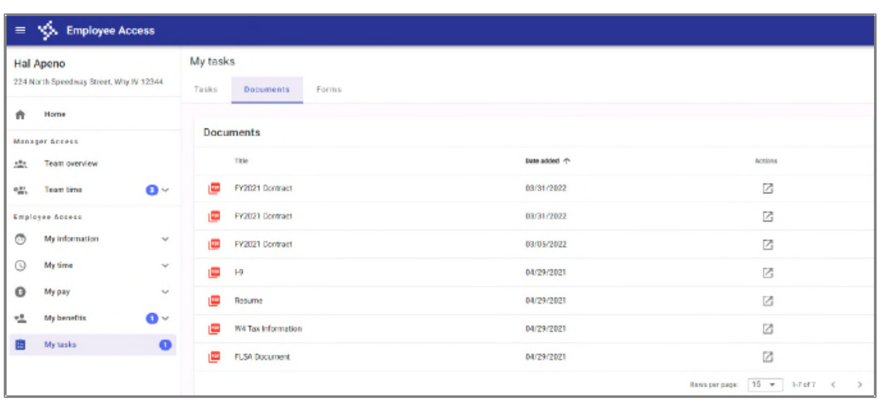
1. Navigate to **Employee Access > My Pay > Pay & Tax > Compensation Statement**.
2. From the **View** dropdown, select each type to view the Total Compensation chart and Fiscal Year to Date amounts. These figures are associated with the Position that displays on the Statement information card.

> If, during part of the year, the Compensation Statement amounts need to reference last year's amounts, change the settings to point to last Fiscal Year under Security > Workflow Configuration > Employee Access Connection Groups.

MY TASKS

Employee Access > My Tasks

My Tasks allows employees to accept or complete pending, actionable task items, and review other custom content provided by their employer. Employees can view outstanding tasks and history of completed tasks. Documents from Content Manager are shown in Employee Access; to restrict the documents a user may view, set these restrictions via the Allow Doc Type field in Portal Default Settings.



Accept a Contract under Outstanding Tasks

When HR publishes contracts to Employee Access, the employees may receive an email notifying them to log into the portal to accept or deny their contract(s), depending on district settings. To accept a contract, follow these steps.

Steps:

1. Click **My Tasks**.
2. Click the arrow to the right of the **Administrator** task. The Contract displays.
3. View the **Contract under Documents**.
4. Click **I Accept this (Contract)**.
5. Mark the **I Accept this Administrator** button.
6. Click **Submit**.
7. Mark the **Show Completed** checkbox. The contract displays with the Status of Complete.

Submit an Employee Form

An Entity can define several User-Defined Forms for employees to have access to and complete online. The forms, once submitted, can be routed to many various resources.

Steps:

1. Click the **Forms** tab,.
2. Click the type of form you want to completed, (e.g., Notice of Intent to Retire).
3. Enter the information into the fields within the form, as applicable.
4. Click **Submit**.

MY TIME

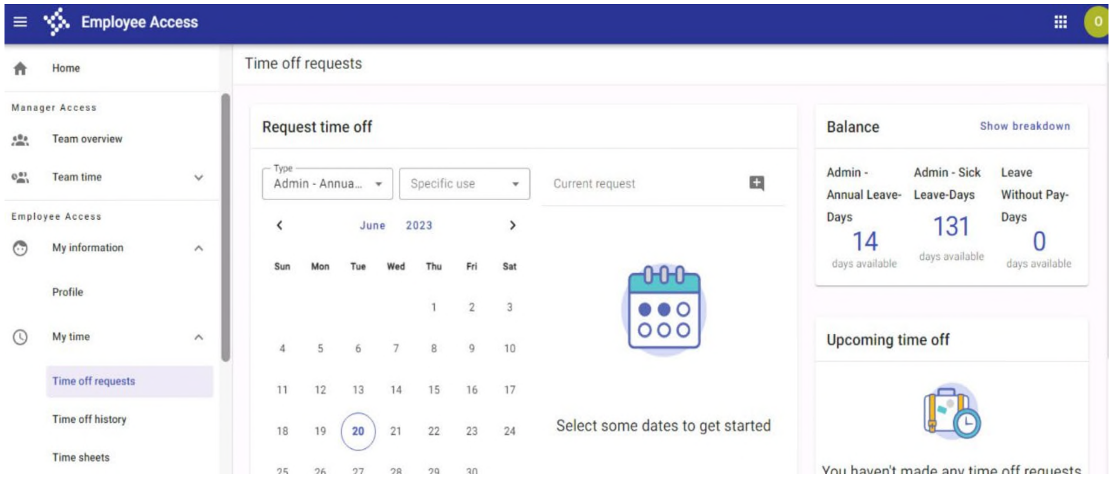
Employee Access > My Time

The Time Off resource allows employees to request time off and view leave transactions.

Requests

Employee Access > My Time > Time Off Requests

Requests display the Balance Summary tab and Breakdown tab, where employees can quickly view leave as a summary or in detail. When viewing either tab, an employee can request time off, add a comment for a current request, and view upcoming time off requests.



Submit a Leave Request via My Time

Submitting a time off request can be done in My Time. Using the portal, employees can request leave from their computer or mobile device anytime and anywhere.

Steps:

1. Navigate to **Employee Access > My Time > Time Off Requests**.
2. From the **Type** dropdown, select the leave type.
3. Beneath **Request Time Off**, select the date(s).
4. From **Current Request**, click **Add Comment** and enter the reason for the time off. Comments are required.
5. Click **Add**. A blue circle is added to alert the approver there is a comment associated with the request.
6. Click **Submit**. The request displays beneath Upcoming time off.

Only requests with a status of In Progress can be cancelled.

Time Off History

Employee Access > My Time > Time Off History

Time Off History displays leave history for all leave plans. An employee can filter transactions by year, view comments when available, and quickly request time off. Leave Plans can also be set NOT to show by select Don't Show in the settings.

Time Sheets

Employee Access > My Time > Time Sheets

Times Sheets is available for hourly time card employees. If an employee is a salaried employee, Time Sheets is not active for them.

BENEFITS

Employee Access > Benefits

An employee can view their current benefits selections and enter the Open Enrollment process from the Benefits menu. Benefits are available only to districts that have purchased the Benefits Enrollment Module.

Employees can now enroll in Medical and Dental HMO plans without being required to enter the required PCP information.

SECTION 2 SUMMARY

In this section, we reviewed the Employee Access menu.