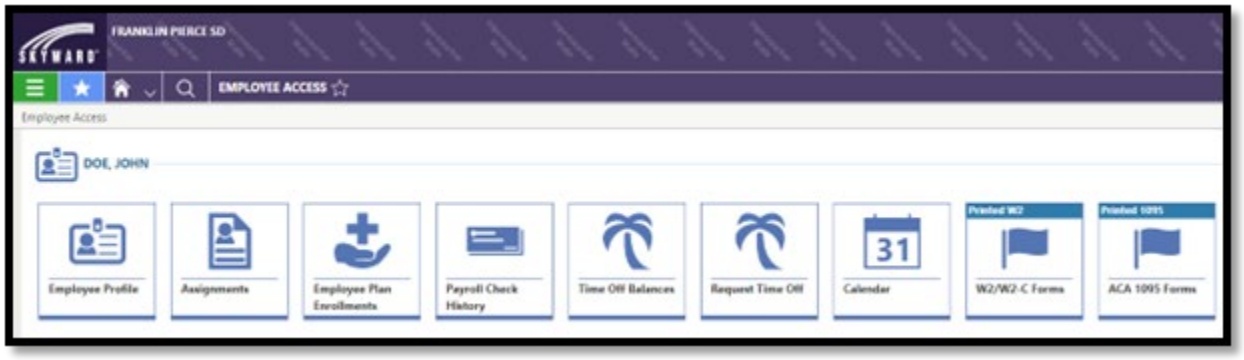
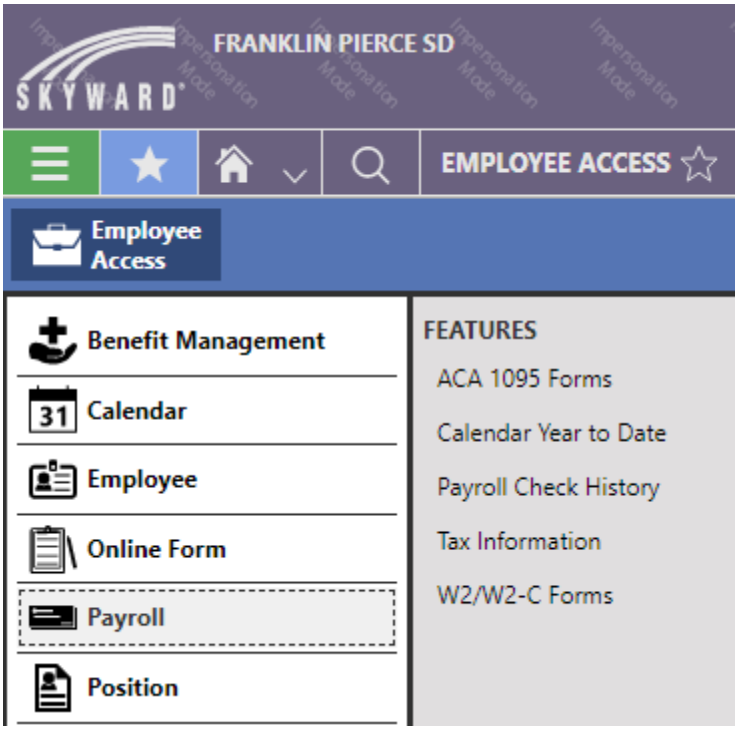
Employee Access in Qmlativ





Viewing Profile Information in Employee Access

In *Employee Access,* you can view your personal and Assignment information by logging in to the software and clicking the *Employee Profile* tile. Alternatively, you can navigate to *Employee Access > Employee* and select *Employee Profile* under *Features.*

Under the *Employee Details* heading, you can view your name, address, phone number, email address, employee number, and latest hire date.
Under the *Assignment Details* heading, you can view your Position, Assignment, building, Start Date, End Date, Amount, and Percent Employed for each assignment. You can click *Open Details* to view the details of each assignment such as pay information, hourly rate or salary, schedule, and stipends. You can have more than one tile on your profile if you have more than one assignment.

Viewing Payroll Check History

In the *Payroll* area of *Employee Access*, you are able to view your *Payroll Check History*. This area of the software gives you access to any checks you have received while working. Nothing will display in the *Payroll Check History* area if you have not received at least one payroll payment. The information displays when a Payroll Run has been completed. This process enables you to easily view paycheck information. Scroll past the step-by-step instructions for instructional video link.

1. Sign in to the software using your assigned username and password. If you have access to more than one portal, you may need to click the icon next to the icon and select **Employee Access** from the **Home** drop-down menu. You see a screen with tiles, such as Employee Profile, Payroll Check History, and Time Off Balances.
2. Verify you are in the correct *District* by checking the information at the top left of the screen.
3. Select the **Payroll Check History** tile. Alternatively, you can view your payroll check history by navigating to > **Employee Access** > **Payroll** and then selecting **Payroll Check History** under **Features**. You see the **Payroll Check History** screen, which displays a list of payroll checks you have received during your employment.
4. Click the icon to the left of the check you wish to view details for. You see the **Payroll Check Details** screen, which displays information about pay, deduction, and benefit transactions.
5. Select the **Timesheets** tab at the left of the screen. You see the timesheets associated with the selected payroll check.

Video reference: https://www.youtube.com/watch?v=7EYTTEUZIuU&t=35s

Viewing Calendar Year to Date Payroll Information

You can view your calendar year to date payroll information in *Employee Access* to see a running total of your pay, *Deductions*, and *Benefits* for the calendar year. You can use this information to compare your gross and net pay, and total deduction and benefit amounts from year to year. Scroll past the step-by-step instructions for instructional video link.

1. Sign in to the software using your assigned username and password. If you have access to more than one portal, you may need to click the  icon next to the  icon and select **Employee Access** from the **Home** drop-down menu. You see a screen with tiles, such as Employee Profile, Payroll Check History, and Time Off Balances.
2. Select  > **Employee Access** > **Payroll**.
3. Select **Calendar Year to Date** under **Features**. You see the **Calendar Year to Date** screen. The record highlighted under the **Calendar Year By Check Date** heading updates the **Calendar Year Deductions** and **Calendar Year Benefits** areas to reflect the associated *Deductions* and *Benefits*.
4. Verify you are in the correct *District* by checking the information at the top left of the screen.
5. Under the **Calendar Year By Check Date** heading, click the  icon to the left of the check year record you wish to view details for. You see the **General** tab of the **Employee Profile Calendar Year Total Details Employee Access** screen, which displays the amounts for *Check Year*, *Pay Gross*, *Net Check Amount*, *Social Security Gross*, *Medicare Gross*, *Federal Gross*, and *State Gross*.
6. Select the **Calendar Year Deductions** tab at the left of the screen. You see your deductions and each associated amount for the calendar year to date.
7. Select the **Calendar Year Benefits** tab at the left of the screen. You see your benefits and each associated amount for the calendar year to date.
8. Select the **Calendar Year Pay Types** tab at the left of the screen. You see your check stubs and the corresponding net pay amounts.

Video reference: https://youtu.be/abmG7BwSsk4

Printing Employee Check Stub

A check stub displays payroll check details that can be used to obtain pay information from a particular paycheck. Printing a check stub through *Employee Access* enables employees to find the information they need without having to contact the payroll department. Scroll past the step-by-step instructions for instructional video link.

1. Sign in to the software using your assigned username and password. If you have access to more than one portal, you may need to click the  icon next to the  icon and select **Employee Access** from the **Home** drop-down menu. You see a screen with tiles, such as Employee Profile, Payroll Check History, and Time Off Balances.
2. Verify you are in the correct *District* by checking the information at the top left of the screen.
3. Click the **Payroll Check History** tile. Alternatively, you can navigate to  > **Employee Access** > **Payroll** and then select **Payroll Check History** under **Features**. You

see the **Payroll Check History** screen, which displays historical payroll checks you have received.

4. Click the ▼ icon to the left of the appropriate check. The ▼ icon only displays if the check was previously printed during a *Payroll Run*. If the check was processed through a payroll run, the **Record Options** and **Report Options** drop-down menus will display. If the check is a converted check, only the **Report Options** drop-down menu will display. You will need to generate a Wage Statement Report.
5. Select **Print Check Stub** from the **Record Options** menu. You see the **Print Payroll Check Stub** screen.
6. Select the appropriate radio button for Print Social Security Number to indicate how you want the *Social Security Number* to display on the check stub. You can choose to mask the entire number, mask the first five digits so only the last four digits are visible, or display the number in its entirety.
   I. If you selected the option to show the complete number, the "Enter your SSN to authenticate" field displays. Continue to the next step.
   II. If you selected the option to only show the last four digits of the number, the "Enter the last four of your SSN to authenticate" field displays. Skip to step 8. If you did not choose to show any digits of number, skip to step 9.
7. Enter your social security number in the "Enter your SSN to authenticate" field. Skip to step 9.
8. Enter the last four digits of your social security number in the "Enter the last four of your SSN to authenticate" field.
9. Click **Next** near the top left of the screen. You see an option to print the check stub.
10. Click **Print Check Stub** near the top left of the screen. The check stub opens in a new browser tab.
11. Follow your organization's procedures for printing documents to print the check stub.
12. Return to the browser tab with the **Print Payroll Check Stub** screen.
13. Click **Close** near the top left of the screen. You return to the **Payroll Check History** screen.

Video reference: https://www.youtube.com/watch?v=biCKWYqGrYs&t=16s

Accessing W2 Information

In the *Payroll* area of *Employee Access*, you are able to view your W2 data for each calendar year you have been employed. You can view this information for record keeping or tax purposes, such as comparing your W2 information from particular calendar years. You will not be able to view your W2 data until your employer has completed W2 processing for that calendar year.
You can also print this information for either personal records or for filing your taxes. For example, you may need to print your W2 form to bring to your tax professional in order to file your tax return at the end of the year. Scroll past the step-by-step instructions for instructional video link.
Video reference: https://www.youtube.com/watch?v=KYpvaD2pmb8

1. Sign in to the software using your assigned username and password. If you have access to more than one portal, you may need to click the ⌄ icon next to the 🏠 icon and select **Employee Access** from the **Home** drop-down menu. You see a screen with tiles, such as Employee Profile, Payroll Check History, and Time Off Balances.

2. Verify you are in the correct *District* by checking the information at the top left of the screen.
3. Select the **W2/W2-C Forms** tile. A Printed or Electronic banner displays at the top of the tile to indicate whether the form was printed by your employer. Alternatively, you can navigate to ☰ > **Employee Access** > **Payroll** and select **W2/W2-C Forms** under **Features**. You see the **W2/W2-C Forms** screen, which lists W2 and W2-C data for each calendar year you have been employed.
4. Verify the Employer Printed W2 box is checked or unchecked as necessary. This box defaults and cannot be modified.
5. Under the appropriate heading, click the ▼ icon next to the W2 or W2-C year you wish to print. You see the **Record Options** drop-down menu.
6. Select one of the options to print your W2 form from the menu.

Option	Description
Print - Masked SSN	Selecting this option generates a PDF copy of the W2/W2-C Form that has the first five digits of your *Social Security Number* masked.
Print - Full SSN	Selecting this option generates a PDF copy of the W2/W2-C Form that displays your full social security number.

7. You see a screen that enables you to verify your Social Security Number and then print your W2.
8. Enter your SSN to authenticate the request. The W2 form contains confidential information and requires you to enter your full social security number to authenticate before you can view or print the generated PDF W2 form. The social security number you enter must match the social security number on the **Employee Profile**. If the social security numbers do not match you will not be able to proceed to the next screen.
9. Click **Next** near the top left of the screen. You see the **Print W2** confirmation screen.
10. Select **Print W2 PDF** near the top left of the screen. You see your W2 form in PDF format, which you can print according to your organization's standards.

Accessing Tax Information

You can access your tax information through *Employee Access* to verify its accuracy. Tax information includes data at the federal and state level about your filing status, any exemptions withheld, citizenship and resident classification, dependents, and tax percentage based on taxable income. Verifying your tax information is accurate helps ensure the correct amount of taxes are deducted from your paycheck. Scroll past the step-by-step instructions for instructional video link.

1. Sign in to the software using your assigned username and password. If you have access to more than one portal, you may need to click the ⌄ icon next to the 🏠 icon and select **Employee Access** from the **Home** drop-down menu. You see a screen with tiles, such as Employee Profile, Payroll Check History, and Time Off Balances.
2. Verify you are in the correct *District* by checking the information at the top left of the screen.
3. Select ☰ > **Employee Access** > **Payroll**.
4. Select **Tax Information** under **Features**. Information on this screen cannot be modified. If you wish to change your tax information, you must follow your

organization's procedures for updating your W4 form. You see the **Employee Profile**, which displays your tax information.

I. If your tax information used the Pre-2020 W4 form, this includes the *Federal Tax Status Code*, *Federal Allowances*, *Calculate Non Resident Alien Tax*, *Tax State*, *State Tax Status Code*, *State Allowance*, *Local Dependents Resident*, *Local Dependents Non Resident*, *Local Personal Exemptions Resident*, *Local Personal Exemptions Non Resident*, *Local Tax Resident*, and *Local Tax Non Resident* fields.

II. If your tax information used the 2020 or later W4 form, this includes the *Federal Tax Status Code*, *Multiple Jobs or Spouse Works*, *Claim Dependents Credit*, *Other Income to Tax*, *Non-standard Deductions, Calculate Non Resident Alien Tax, Tax State, State Tax Status Code, State Allowances, Local Dependents Resident, Local Dependents Non Resident, Local Personal Exemptions Resident, Local Personal Exemptions Non Resident, Local Tax Resident,* and *Local Tax Non Resident fields*.

Video reference: https://www.youtube.com/watch?v=W-E5ilipj6g

Accessing ACA Information

In the *Payroll* area of *Employee Access*, you can view ACA 1095C information for each year. ACA information includes data about your health insurance *Offer of Coverage*, *Safe Harbor*, and *Covered Individuals* on your health insurance plan. You can view this information for record-keeping purposes, such as comparing your ACA information from year to year. You can view all historical data that has been processed on the *ACA Information* screen.

You can also print this information to be used for either personal records or tax purposes. For example, you may need to print your 1095C form for your tax professional in order to file your tax return at the end of the year. Scroll past the step-by-step instructions for instructional video link.

1. Sign in to the software using your assigned username and password. If you have access to more than one portal, you may need to click the ⌄ icon next to the 🏠 icon and select **Employee Access** from the **Home** drop-down menu. You see a screen with tiles, such as Employee Profile, Payroll Check History, and Time Off Balances.
2. Verify you are in the correct *District* by checking the information at the top left of the screen.
3. Select the **ACA 1095 Forms** tile. A Printed or Electronic banner displays at the top of the tile to indicate whether the form was printed by your employer. Alternatively, you can navigate to ☰ > **Employee Access** > **Payroll** and then select **ACA 1095 Forms** under **Features**.

You see the **ACA Information** screen, which displays any ACA data for each calendar year.

4. Verify the Employer Printed 1095 box is checked or unchecked as necessary. This box defaults and cannot be modified.
5. Under the **ACA 1095 Forms** heading, click the ▼ icon next to the ACA year you wish to print a 1095C form for. You see the **Record Options** drop-down menu.
6. Select **Print 1095-C** from the menu. You see the **Print 1095 Full SSN** screen.
7. Enter your *Social Security Number* in the "Enter your SSN to authenticate" field.
8. Click **Next** near the top left of the screen. You see the option to print the 1095C form.
9. Click **Print 1095 full SSN** near the top left of the screen.
10. Print the PDF according to your organization's standards.

Video reference: https://www.youtube.com/watch?v=ocZ4rT5cvR8