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User Manual

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Chapter 1 : Overview of SunPac Employee Portal

The SunPac Employee Portal allows employees to log in to a secure website to view and/or print current or previous check stubs. These check stubs will include the date, amount of check, and the check number, as well as, miscellaneous deductions and leave used and earned for the current period and year-to-date.

Menu Options

The following is a brief description of the Menu Options found on the main screen of the User Portion of the Employee Portal.

Home

This option allows the user to go back to the main screen of the portal.

Employee Data

This option allows the user to view their check history.

User Maintenance

This option will allow the user to change their password.

About

This option will display what version of the portal you are currently running.

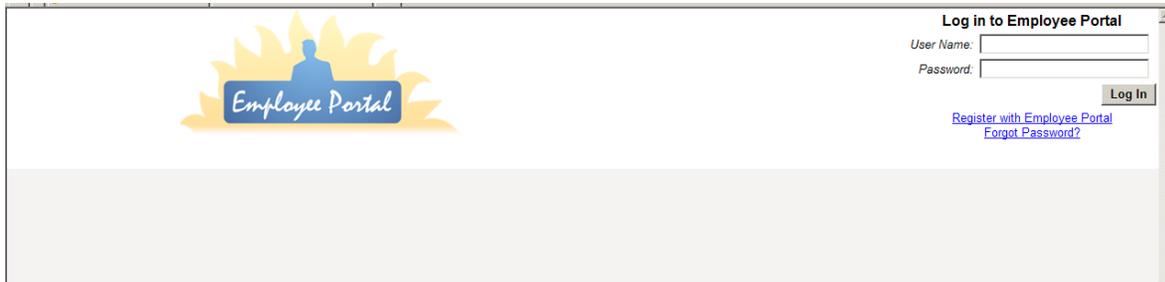
Chapter 2 : Opening SunPac Employee Portal

The Employee Portal software is a web-based product. The first step to signing into the SunPac Employee Portal is to open your web browser. Microsoft Internet Explorer is an example of a web browser. Once the web browser is open, enter the SunPac Employee Portal website address. This address will vary between school districts. The normal web address is //ServerIPAddressORServerName/SunPacEP/default.aspx. If you are not able to access this website, your IT department may have “hidden” it with a web address alias. Check with your IT department on how to get a connection to the website.

PLEASE NOTE

If a shortcut has been created on your desktop, just double click on the icon to access the logon screen.

A screen similar to the following will appear when the above address has been entered.



PLEASE NOTE

To create a shortcut to the above website, right click anywhere on the white portion of the screen and click “Create Shortcut.” Click “YES” on the message box that pops up. The box should look similar to this:



Instructions on Creating an Account

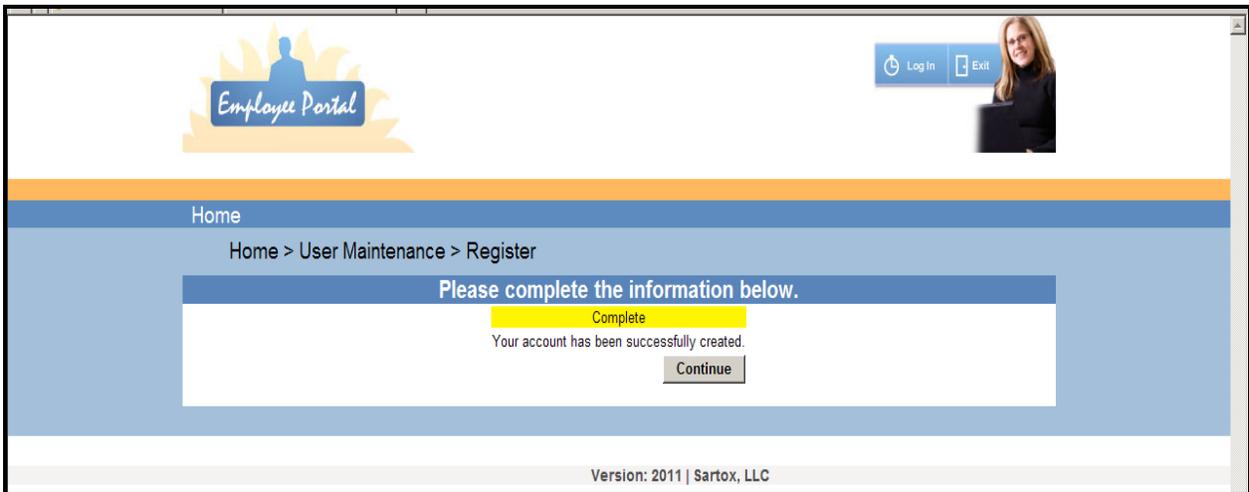
Before a person can log on to the Employee Portal, they must first register with the SunPac Employee Portal System. In order to register, they will need their first and last name as it appears in SunPac along with their social security number.

- Click on the Register with SunPaC EPS link. A screen similar to the following will appear:

The screenshot shows a web browser window with a registration form. At the top, there is a breadcrumb trail: > User Maintenance > Register. Below this is a blue header bar with the text "Please complete the information below." The form contains several input fields: "First Name:", "Last Name:", "SSN:", "User Name:", "E-mail:", "Password:", "Confirm Password:", "Security Question:", and "Security Answer:". The "Security Question" dropdown menu is currently set to "In what city where you born?". Below the form are two buttons: "Register" and "Cancel".

- Type in First and Last Name.
- Type in Social Security Number.
- Type in a username. This is the name that will be used to log on to the system.

- Type in a password. The password must be at least 5 characters long and must contain one of the following non-alphanumeric characters:
! @ # \$ % ^ & * ()
- Confirm your password.
- Email address is optional.
- Type in a Security Question. This question will be used if you forget your password and need help remembering it.
- Type in the answer to your security question.
- Click on “Create User.” A screen similar to the following will appear letting you know that the user was created successfully. Click “Continue” to return to the log on screen and log on with your username and password.



Log on to the SunPac Employee Portal

After you have successfully registered with the system you can then log on to the system (currently there is no set limit on the number of failed log in attempts). The logon screen looks like the following screen:

- Type in the username that was created during the registration process.
- Type in the password that was created during the registration process.
- Click “Log In.” A screen similar to the following will appear.

Home > Employee Data > Check History

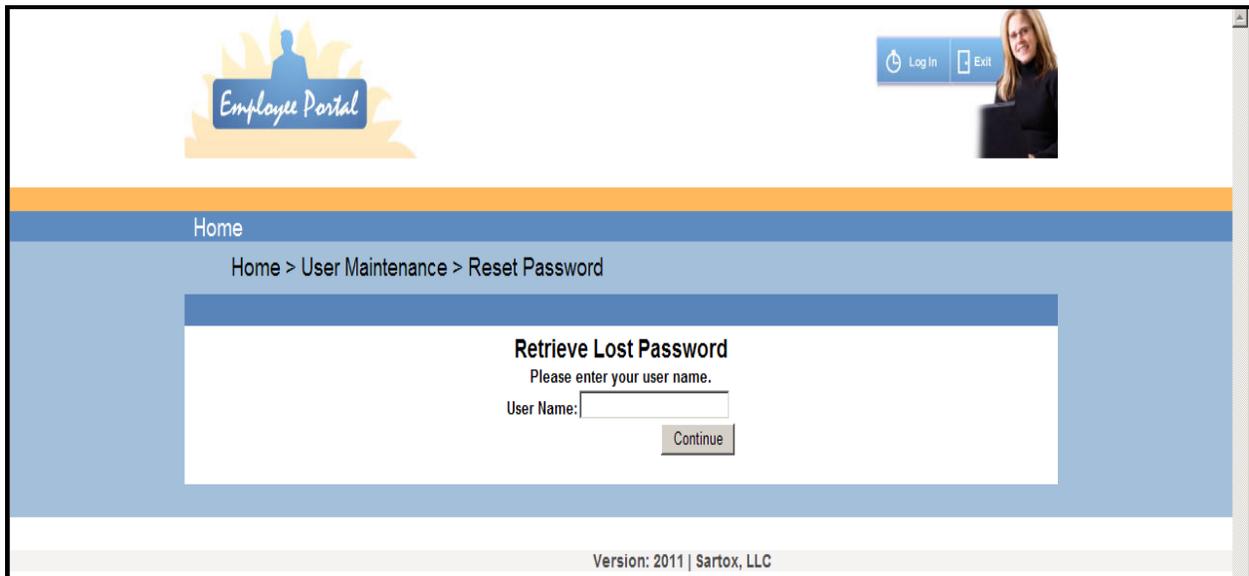
Check List							
	Check Date	Check Number	Amount	Check Type	Direct Deposit	Status	
View	9/15/2010	471532	\$497.53	Payroll	<input checked="" type="checkbox"/>	Posted	View As PDF
View	8/31/2010	468583	\$30.72	Payroll	<input checked="" type="checkbox"/>	Posted	View As PDF
View	6/25/2010	464933	\$602.55	Payroll	<input checked="" type="checkbox"/>	Posted	View As PDF
View	6/15/2010	463176	\$1,288.75	Payroll	<input checked="" type="checkbox"/>	Posted	View As PDF
View	5/14/2010	459823	\$1,621.23	Payroll	<input checked="" type="checkbox"/>	Posted	View As PDF
View	4/15/2010	456397	\$1,274.24	Payroll	<input checked="" type="checkbox"/>	Posted	View As PDF
1 2 3							
Back							

Forgot Password

This option allows a user to answer their security question and change their password when they cannot remember their current password. This option will not be available if a user has locked out their account by attempting to log in too many times with an incorrect password.

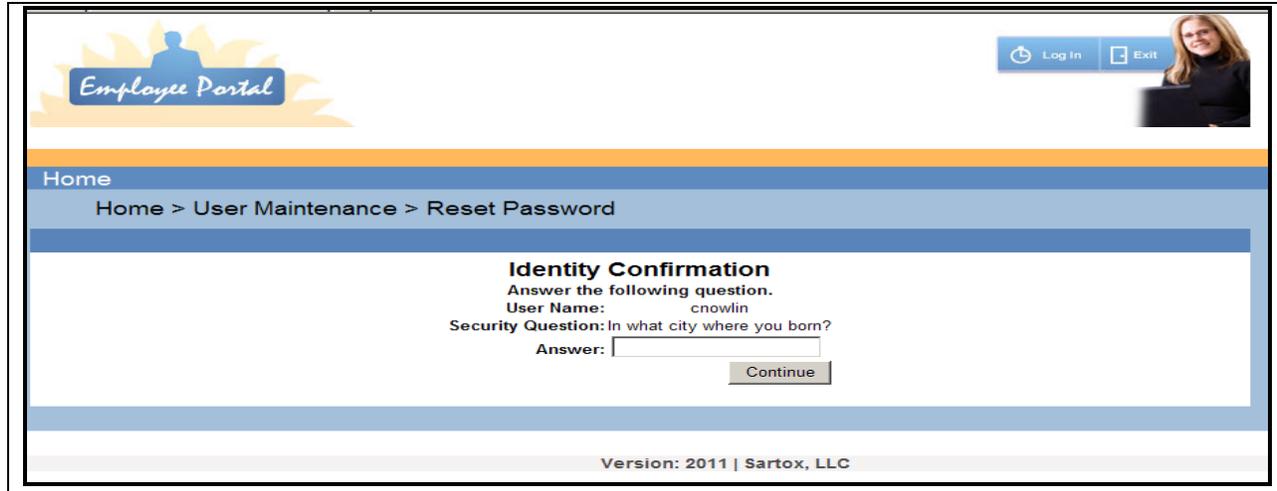
Select the “Forgot Password” option from the Login Screen.

A screen similar to the following will appear:



How to change password when forgotten

- I. Click the “forgot password” link from the login page.
- II. Type in the user name that was created during the registration process.
- III. Click “continue.”



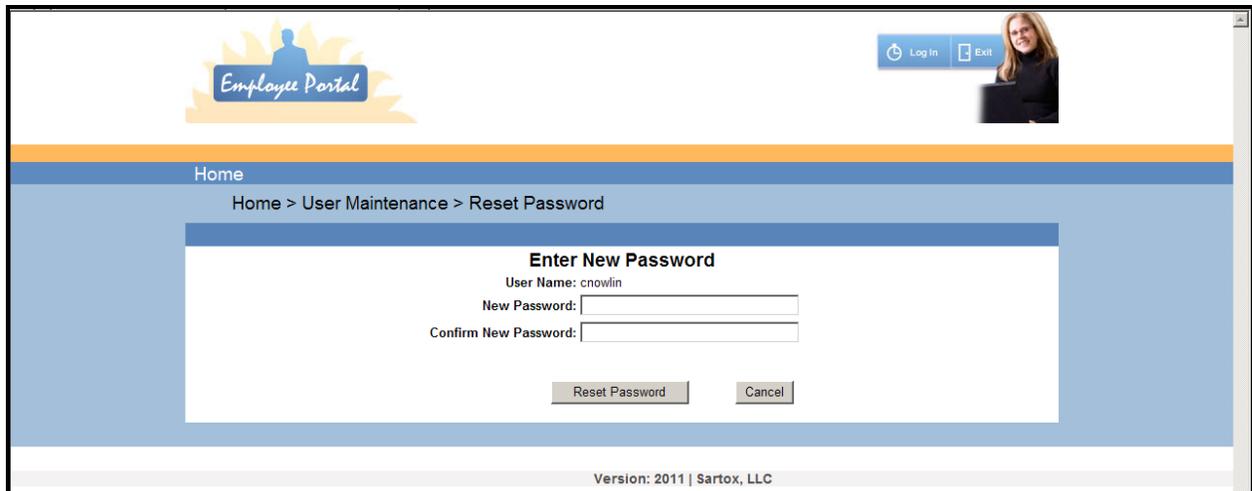
The screenshot shows the SunPac Employee Portal interface. At the top left is the "Employee Portal" logo. At the top right are "Log In" and "Exit" buttons and a user profile picture. The breadcrumb trail reads "Home > User Maintenance > Reset Password". The main content area is titled "Identity Confirmation" and asks the user to answer a security question. The user name is "cnowlin". The security question is "In what city where you born?". There is an input field for the answer and a "Continue" button. The footer indicates "Version: 2011 | Sartox, LLC".

IV. Type in the answer to the security question.

V. Click "Continue."

VI. Type in New Password.

VII. Type in the new password again to confirm.



The screenshot shows the SunPac Employee Portal interface. At the top left is the "Employee Portal" logo. At the top right are "Log In" and "Exit" buttons and a user profile picture. The breadcrumb trail reads "Home > User Maintenance > Reset Password". The main content area is titled "Enter New Password" and shows the user name "cnowlin". There are two input fields: "New Password:" and "Confirm New Password:". There are "Reset Password" and "Cancel" buttons. The footer indicates "Version: 2011 | Sartox, LLC".

VIII. Click "Reset Password."

Chapter 3 : Home Screen

When the user logs on to the system they will be taken to their home screen which displays all of their check stubs that are available to view and/or print. This screen will also display voids but will not display 202 entries.

Select “Home”

A screen similar to the following will appear when the “home” screen is selected:

The screenshot shows the Employee Portal interface. At the top right, there are buttons for 'Change Password', 'Log Out', and 'Exit'. Below this, a message states 'Showing checks for employee: JAMES SABO'. A navigation menu includes 'Home', 'Employee Data', 'User Maintenance', and 'Help'. The main content area is titled 'Check List' and contains a table with the following data:

	Check Date	Check Number	Amount	Check Type	Direct Deposit	Status	
View	7/26/2011	474420	\$3,522.42	Payroll	<input checked="" type="checkbox"/>	Posted	View As PDF
View	2/17/2011	472538	\$3,240.01	Payroll	<input checked="" type="checkbox"/>	Posted	View As PDF
View	8/31/2010	469590	\$3,240.01	Payroll	<input checked="" type="checkbox"/>	Posted	View As PDF
View	6/25/2010	0	\$0.00	Payroll	<input checked="" type="checkbox"/>	Posted	View As PDF
View	6/25/2010	465359	\$1,170.37	Payroll	<input checked="" type="checkbox"/>	Posted	View As PDF
View	5/28/2010	461021	\$3,215.93	Payroll	<input checked="" type="checkbox"/>	Posted	View As PDF

Below the table, there are pagination links '1 2 3' and two buttons: 'View W2s' and 'Back'.

At the top of the screen the user will have the options to change their password log out of the system or exit. The top middle portion of the screen will display a message about which user’s check stubs are being displayed. There are menu options to the left of the screen that will give the user the ability to navigate to a different screen.

View

Clicking this option will allow you to view the check stub.

Check Date

This column will display the dates that each check was issued.

Check Number

This column displays the check number.

Amount

This column displays the amount of the check.

Direct Deposit

If this box is checked the check was processed using the direct deposit method instead of a paper check.

Status

The status lets you know the status of the check. Posted meaning the check has already been deposited in the bank. Voided means the check has been voided and Pending means the check has not been deposited to the employee's bank.

Back

This will take the user back to the "home Screen" where they can perform another search or choose another menu option.

View As PDF

This option allows you to view the check stub in PDF format. If the internet browser is Google Chrome Safari or Firefox this button will have to be clicked in order to print the check stub.

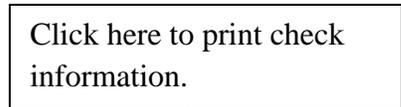
View and/or Print Employee Check Information

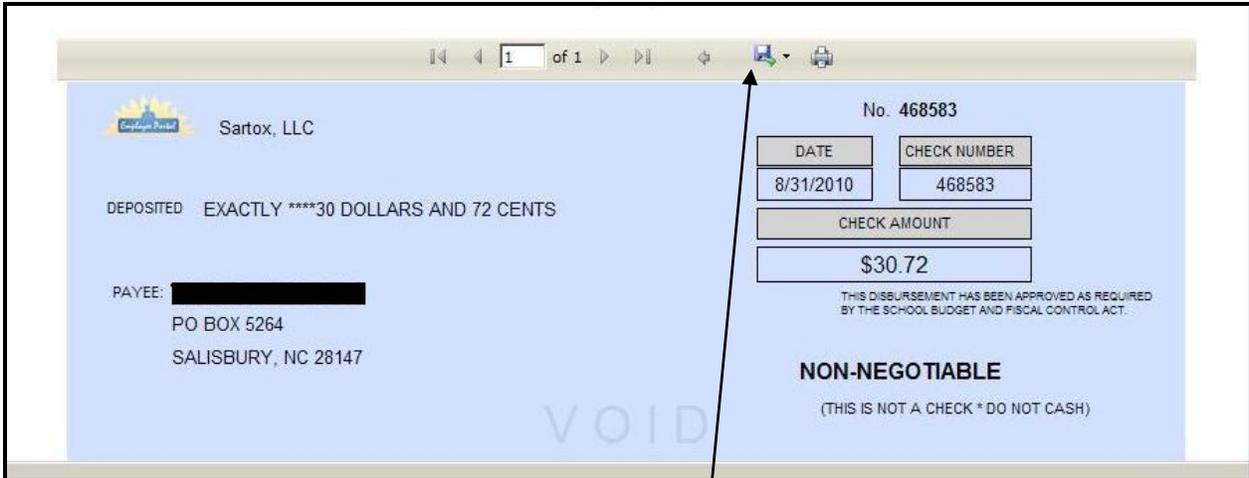
To view and/or print a check stub:

- Click on the "Select" option to the left of the desired check stub.
- The check stub will be displayed on the screen. Once the check stub is displayed the ability to print also becomes available.
- Click on the printer icon to print.

The check will look similar to the following:

Click here to print check information.





Click Here to select a Format and Export Check to a file.

NOTICE OF DIRECT DEPOSIT

Location:
 PO BOX 5264
 SALISBURY, NC 28147
 803 MINIBUS DRIVERS/MONITORS

Withholding Status	Exemptions	Additional Withholding	Retirement Number	Direct Deposit	Account Number/ Transit Number
Federal S	0	\$40.00	514438	Y	002294332
State S	0	\$30.00			002294332

Gross	Code	Escrow	Dock Amt.	Net Gross	Grade	Step	Days Empl.	Days Paid	Hours Paid	Percent Employed	Description
\$35.59	SSBUS	0.00	.00	35.59	51	20	20.00	0.00	2.75	100.00	SUMMER TRAINING

	Salary	Retirement	Federal Tax	State Tax	Social Security Tax	Medicare	Miscellaneous Deductions	Net Pay
Current	35.59	2.14	.00	.00	2.21	.52	.00	30.72
YTD	13,688.97	821.35	1,458.95	884.00	836.17	195.58	475.88	9,017.26

Code		Description	Current	YTD
CFCANC		CAF-BNF-CANCER 19089	.00	202.68
P2EO		SMRT CHOICE-EEONLY	.00	.00
SECU		ST EMP CREDIT UNION 999	.00	201.00
UWAY10		UNITED WAY 2010	.00	72.00

Leave	Current Period		Fiscal Year-To-Date					End Bal.
	Earned	Used	Beg. Bal.	Earned	Used	Adj.	Transferred	
ANNUAL LEAVE	0.000	0.000	78.890	0.000	0.000	0.000	0.000	78.890
EXTENDED LEAVE	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
MISC. LEAVE	0.000	0.000	78.800	0.000	0.000	0.000	0.000	78.800
PERSONAL LEAVE	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
COMP TIME	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
SICK LEAVE	0.000	0.000	574.240	0.000	0.000	0.000	0.000	574.240
SPEC. LEAVE	0.000	0.000	0.000	10.000	10.000	0.000	0.000	0.000

The check will show the amount the name and address of employee the location of the workplace their miscellaneous deduction information as well as their leave information for current and year-to-date.

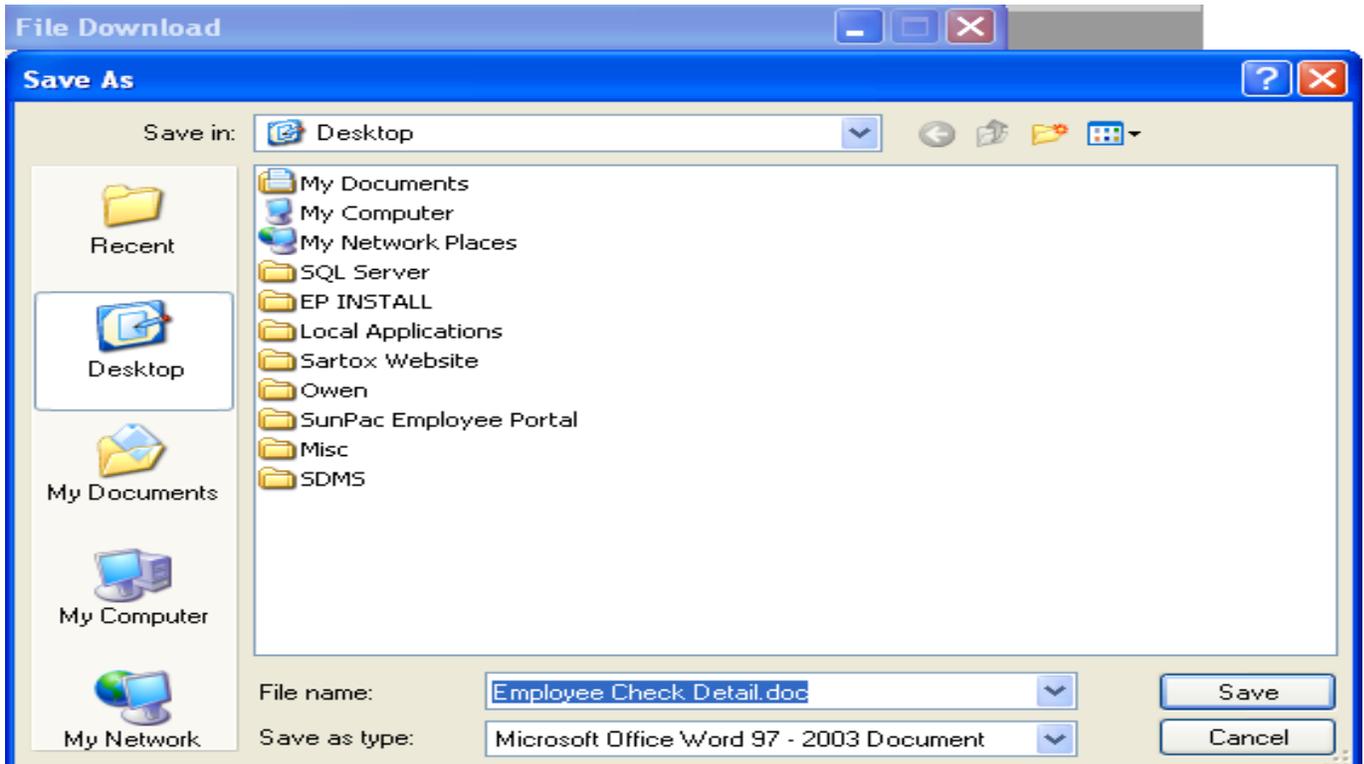
How to Export Check or W2 to a File

I. Click on the  in the top right portion of the check menu par.

II. Choose “Excel”, “PDF”, or “Word” to export the file. 

III. Click “Open” to open the file before saving or click “Save” to save the file.

IV. Choose the location for which you wish to save the file. You can also change the name of the file in this same box before saving.



V. Click “Save.”

View and/or W2

To view and/or print a W2:

- Click on the “Select” option to the left of the desired W2.
- The W2 will be displayed on the screen. Once the check is displayed, the ability to print also becomes available.
- Click on the printer icon to print.

The W2 will look similar to the following:

Form W-2 Wage and Tax Statement 2010		7 Social security tips	1 Wages, tips, other compensation	2 Federal income tax withheld
c Employer's name, address, and ZIP code ROWAN-SALISBURY BOARD OF ED P.O. BOX 2349 SALISBURY, NC 28145		8 Allocated tips	3 Social security wages	4 Social security tax withheld
e Employee's name, address, and ZIP code ANDXYZ Q ABEABC 137 ELROSA RD MOORESVILLE, NC 28115		9 Advance EIC payment	5 Medicare wages and tips	6 Medicare tax withheld
15 State		10 Dependent care benefits	11 Nonqualified plans	12a See instructions for box 12
NC	Employer's state ID number 080100001	13 <input type="checkbox"/> Statutory employee <input checked="" type="checkbox"/> Retirement plan <input type="checkbox"/> Third-party sick pay	14 Other	12b
	16 State wages, tips, etc. 22,559.65	b Employer identification number (EIN) 566001834		12c
		a Employee's social security number 312-67-5575		12d
		17 State income tax 1,311.00	18 Local wages, tips, etc. 1,311.00	19 Local income tax 1,311.00
		20 Locality name MOORESVILLE, NC		
Copy B-To Be Filed With Employee's FEDERAL Tax Return This information is being furnished to the Internal Revenue Service. CMB No. 1545-0008 Dept. of the Treasury - IRS Visit the IRS website at www.irs.gov/efile.				
This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.				
Form W-2 Wage and Tax Statement 2010		7 Social security tips	1 Wages, tips, other compensation	2 Federal income tax withheld
c Employer's name, address, and ZIP code ROWAN-SALISBURY BOARD OF ED P.O. BOX 2349 SALISBURY, NC 28145		8 Allocated tips	3 Social security wages	4 Social security tax withheld
e Employee's name, address, and ZIP code ANDXYZ Q ABEABC 137 ELROSA RD MOORESVILLE, NC 28115		9 Advance EIC payment	5 Medicare wages and tips	6 Medicare tax withheld
15 State		10 Dependent care benefits	11 Nonqualified plans	12a See instructions for box 12
NC	Employer's state ID number 080100001	13 <input type="checkbox"/> Statutory employee <input checked="" type="checkbox"/> Retirement plan <input type="checkbox"/> Third-party sick pay	14 Other	12b
	16 State wages, tips, etc. 22,559.65	b Employer identification number (EIN) 566001834		12c
		a Employee's social security number 312-67-5575		12d
		17 State income tax 1,311.00	18 Local wages, tips, etc. 1,311.00	19 Local income tax 1,311.00
		20 Locality name MOORESVILLE, NC		
Copy C-For EMPLOYEE'S RECORDS (See Notice to Employee on the back of Copy B.) CMB No. 1545-0008 Dept. of the Treasury - IRS Visit the IRS website at www.irs.gov/efile.				

Chapter 4 Employee Data

This option will allow the user to get back to their check information if they are on another screen.

Select “Employee Data.”

Select “Check History.”

A screen similar to the following will appear:

The screenshot shows a web application interface. At the top, there is a 'Home' button. Below it, a header reads 'Employees with last name beginning with a'. The search criteria are set to 'Employees where: Last Name' with a dropdown menu, 'IS/LIKE' with a text input containing 'a', and a 'Search' button. Below the search bar, the 'Active Status' is set to 'Active' (checked) and 'Inactive' (unchecked). A table displays the search results with columns: Last Name, MI, First Name, Active, SSN Ending In, and Emp. ID. Each row in the table has a 'View' button on the right side.

Last Name	MI	First Name	Active	SSN Ending In	Emp. ID
ABEABC	Q	ANDXYZ	<input checked="" type="checkbox"/>	5575	000668786
ABEABC	Q	OPAXYZ	<input checked="" type="checkbox"/>	2566	000825777
ABEABC	Q	SUSXYZ	<input checked="" type="checkbox"/>	7657	000800868
ABEABC	Q	TIMXYZ	<input checked="" type="checkbox"/>	0791	000574002
ABRABC	Q	DIAXYZ	<input checked="" type="checkbox"/>	8244	000151455
ABRABC	Q	MERXYZ	<input checked="" type="checkbox"/>	2177	000725388
ADAABC	Q	ANTXYZ	<input checked="" type="checkbox"/>	8060	000331271
ADAABC	Q	DEBXYZ	<input checked="" type="checkbox"/>	1813	000275024
ADCABC	Q	SCOXYZ	<input checked="" type="checkbox"/>	9562	000452773
ADCABC	Q	TERXYZ	<input checked="" type="checkbox"/>	2173	000175384
ADKABC	Q	CYNXYZ	<input checked="" type="checkbox"/>	3862	001963862
ADKABC	Q	JASXYZ	<input checked="" type="checkbox"/>	2773	000215984
AGGABC	Q	MARXYZ	<input checked="" type="checkbox"/>	6313	000909524
AGUABC	Q	LINXYZ	<input checked="" type="checkbox"/>	9373	000762584
AISABC	Q	MIKXYZ	<input checked="" type="checkbox"/>	9888	000943099
ALDABC	Q	ANGXYZ	<input checked="" type="checkbox"/>	2345	000085556
ALDABC	Q	DIAXYZ	<input checked="" type="checkbox"/>	3887	000067098
ALDABC	Q	PATXYZ	<input checked="" type="checkbox"/>	9742	000062953

View

Clicking this option will allow you to view the check stub.

Check Date

This column will display the dates that each check was issued.

Check Number

This column displays the check number.

Amount

This column displays the amount of the check.

Direct Deposit

If this box is checked the check was processed using the direct deposit method instead of a paper check.

Status

The status lets you know the status of the check. Posted meaning the check has already been deposited in the bank. Voided means the check has been voided and Pending means the check has not been deposited to the employee's bank.

Back

This will take the user back to the "home Screen" where they can perform another search or choose another menu option.

View As PDF

This option allows you to view the check stub in PDF format. If the internet browser is Google Chrome Safari or Firefox this button will have to be clicked in order to print the check stub.

Chapter 5 : User Maintenance

This option will allow the user to edit their account change their password and/or edit security questions for all users.

Edit Account

This option will allow the person signed in to edit their first and last name social security number and/or email address.

Select “User Maintenance.”

Select “Edit Account.”

A screen similar to the following will appear:

Home > User Maintenance > Edit Account

Please complete the information below.

First Name: CHXYZ

Last Name: ASHABC

SSN: ***-**-7789

User Name: cnowlin

EMail: cnowlin@sartox.com

Save Cancel

First Name

This field contains the first name of the Employee.

Last Name

This field contains the last name of the Employee.

SSN

This field contains the SSN of the Employee.

User Name

This field contains the username that was created when the user registered.

Email

This field contains the email address that was created when the user created their account.

Save

Click “Save” after making any changes.

Change Password

This option will allow the user to change their own password.

Home > User Maintenance > Change Password

Please complete the information below.

First Name:
 Last Name:
 SSN:
 User Name:
 Old Password:
 New Password:
 Confirm New Password:

How to Change Password

- I. Select “User Maintenance.”
- II. Select “Change Password.”
- III. Enter current password.
- IV. Enter New Password.
- V. Enter New Password again to confirm.
- VI. Click “Change Password.”

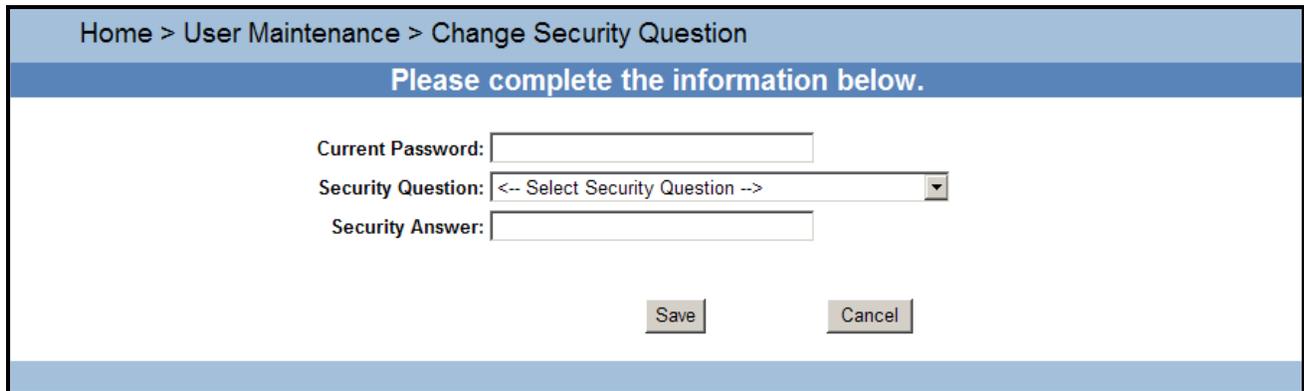
Change Security Question

This option is used to change the security question that was selected when an employee first registered for the Employee Portal.

Select “User Maintenance.”

Select “Change Security Question.”

A screen similar to the following will appear:



The screenshot shows a web form titled "Home > User Maintenance > Change Security Question". Below the title is a blue header bar with the text "Please complete the information below." The form contains three input fields: "Current Password:" with a text box, "Security Question:" with a dropdown menu showing "<-- Select Security Question -->", and "Security Answer:" with a text box. At the bottom of the form are two buttons: "Save" and "Cancel".

Current Password

Enter your password in this field.

Security Question

This drop down menu contains a list of available security questions.

Security Answer

This field contains the answer for the security question that was chosen.

How to Change Security Question

- I. Select "User Maintenance."
- II. Select "Change Security Question."
- III. Type in current password.
- IV. Select desired question.
- V. Type in the Answer.
- VI. Click "Save."

Chapter 6

Chapter 7 : About

This option contains information on what version of the software you are currently running. This is useful particularly when performing upgrades so that you know what version you are on before upgrading. If you call the support desk for help they may also ask you to check here and tell them what version you are currently running.

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