Dear Staff,

We're pleased and excited to announce the launch of our new **Employee Access Portal**, which will streamline access to important information, resources, and tools.

The Employee Access Portal will complement, not replace, Frontline Central or Frontline Time & Attendance. You will continue to use the Frontline system for forms and leave entry as usual.

Login Information

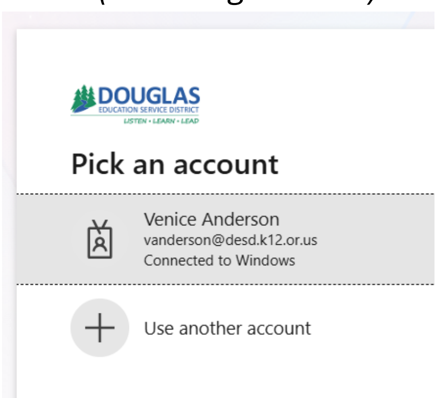
Please use the information below to access the portal for the first time.

Portal Link:
https://douglaseduservicedtor.tylerportico.com/tesp/employee-selfservice

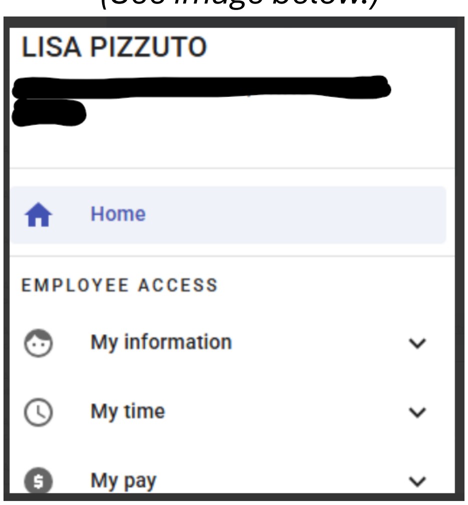
---

First-Time Login Instructions

1. Your username will be your **FULL Douglas Education Service email address** (long email address).
2. If prompted, select the option with your name and **short email address**. *(See image below.)*



3. The next screen will prompt you to enter your identifying information (email address, last four digits of your SSN, birthdate, and home mailing address ZIP code) to confirm your identity.
4. Once logged in, your **Employee Access** screen will display your personal information. *(See image below.)*



School ERP Pro (Employee Access) Employee Access 101 GUIDE

Table of Contents

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/reports/claims, 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. For districts using Expense Reimbursement, select My Expense Reports under the main menu; for more information about expense claims, see the Expense Reimbursement Guide.

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

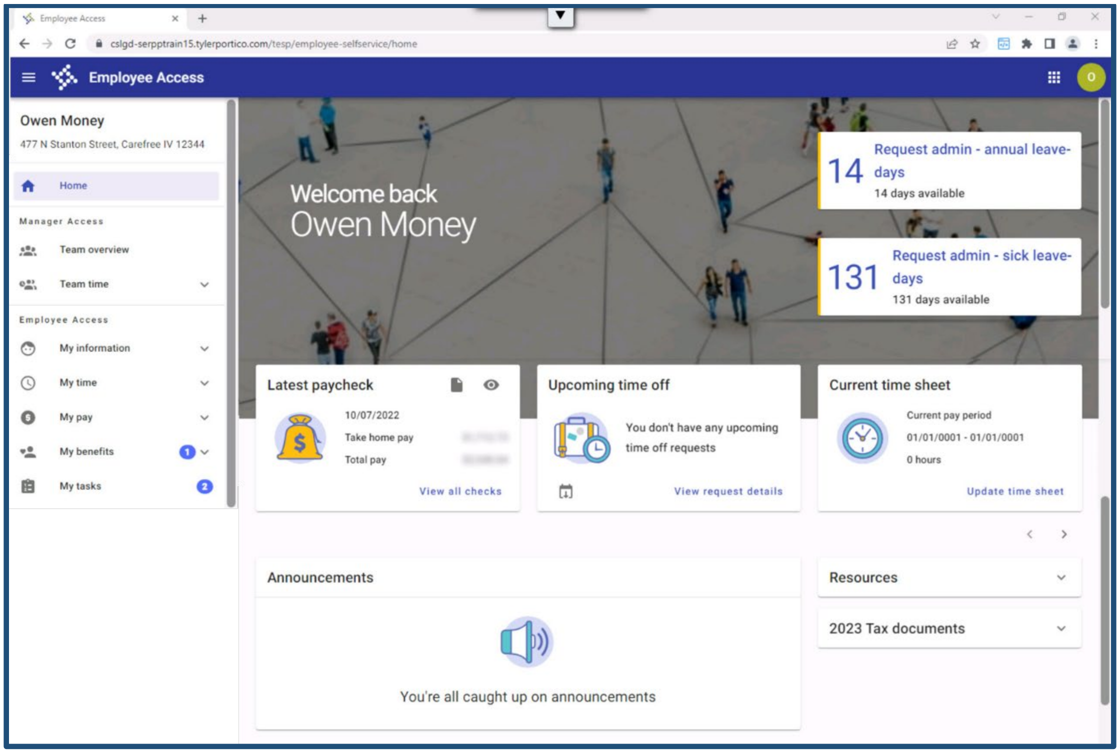
Once the employee provides their information, School ERP Pro validates the user's data with their Employee Maintenance record. Once validated, the user's Employee Access Homepage displays.

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 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:

FEATURE	DESCRIPTION
Leave Plan	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.

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 My Expense Reports under Resources, allowing the user to enter employee reimbursements and process them through the system to be paid. See more information in the Expense Reimbursement Guide.

VIEW LEAVE PLAN DETAILS

Steps:

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

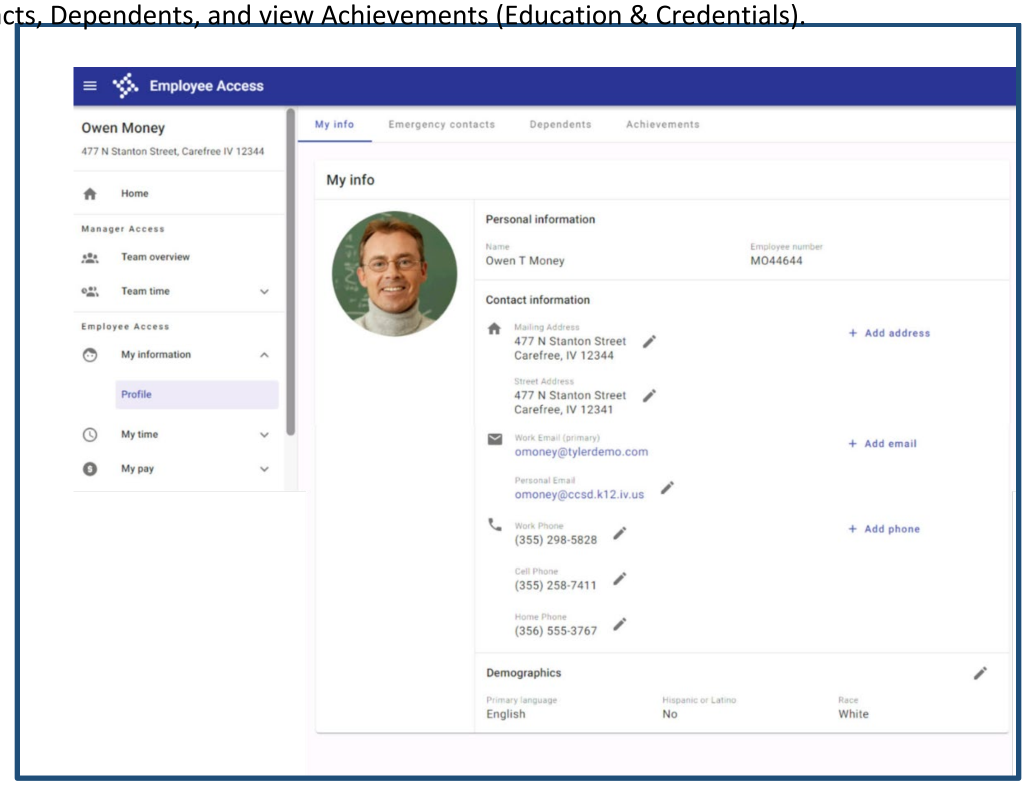
> **The Leave Plan card is an invaluable feature within Employee Access that provides a breakdown of the employee's leave plans and available units!**

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

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.

Viewing Employee Access Certifications, Endorsements, and Education Records

- For employees that have Certification but no Endorsements, the system shows the Certification record and then a box, saying **No Endorsements**.
- For employees that have Certification and Endorsements, the system shows the Certification record and then a box, saying **View Endorsements**.
- For employees showing Certifications, Endorsements, and Education records, the system shows Education below the Certification and Endorsement portions. There is an option to **View Coursework**, if it has that information included.
- For employees without Certification, Endorsements, and Education, the system shows: **This employee doesn't have any achievements yet**.

View Achievements, Education, Coursework, Certifications

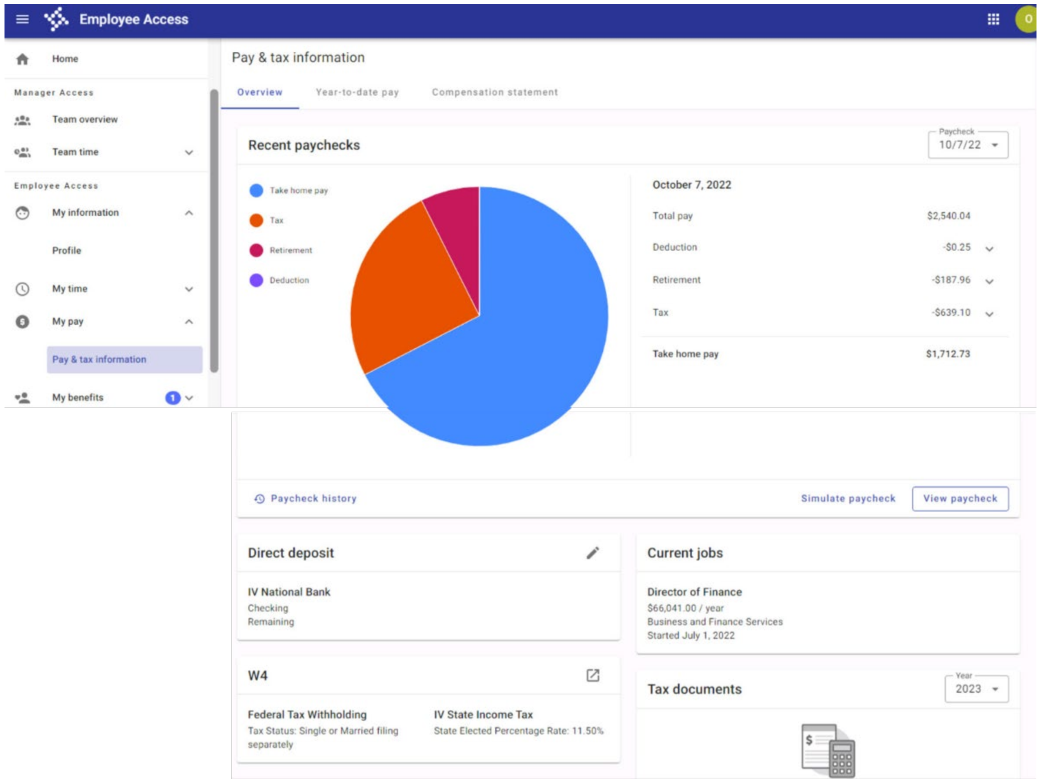
Steps:

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.

Former Employee Access

Section Topics

- Terminating an Employee
- Registering with Former Employee Access

Former Employee Access provides information for retired or terminated employees. This site allows former employees to view prior paychecks and tax documents while keeping their profile information up-to-date. This site also works with Tyler's new Applicant Tracking module.

TERMINATING AN EMPLOYEE

Terminating an employee in School ERP Pro is the first step to allowing the former employee to register on the Former Employee Access site.

Steps:

1. Navigate to **Payroll/Human Resources > Employees > Employee Maintenance**.
2. Look up the employee's record.
3. Click the **Employee Access Information** tab.
4. From the **Actions** or 3-dot menu, select **Remove Employee Access Registration** and follow the instructions to save the record.

REGISTER WITH FORMER EMPLOYEE ACCESS

Once an employee is terminated within School ERP Pro, you need to notify them that they can now access the Former Employee Access site.

Steps:

1. Notify the former Employee the Former Employee Access portal is available for registration and send them the **Former Employee Access URL**.

   Resident URLs are similar to the Employee Access URLs, with a small change to the last part of the URL. For example,

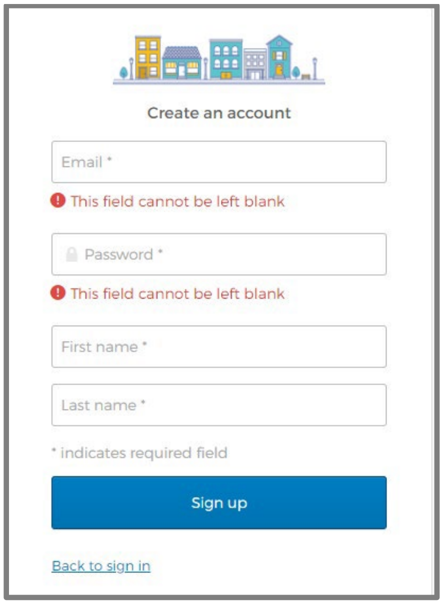
   https://capitalcityelementarysdaz.tylerportio.com/portal/citizen/dashboard

2. The URL directs the user to the portal launch page where the employee can select **Former Employee Access**.

The website then routes the user to the correct entity login page.

3. If the user has never logged into Former Employee Access, they should select the option from the bottom of the page to **Sign Up** for a new account.

This process takes the former employee through the steps to create an account.



4. The former employee should complete all required fields, marked with asterisks, and then click **Sign Up**. Once the form is complete, the user is directed to the next verification window to validate their three key pieces of information, which links them to the correct Employee Maintenance record.

Former Employee Access does not check the user's email address entered here against their record in Employee Maintenance. The employee/former employee only needs to go to the website, create an account with the email address of their choice, and then register.

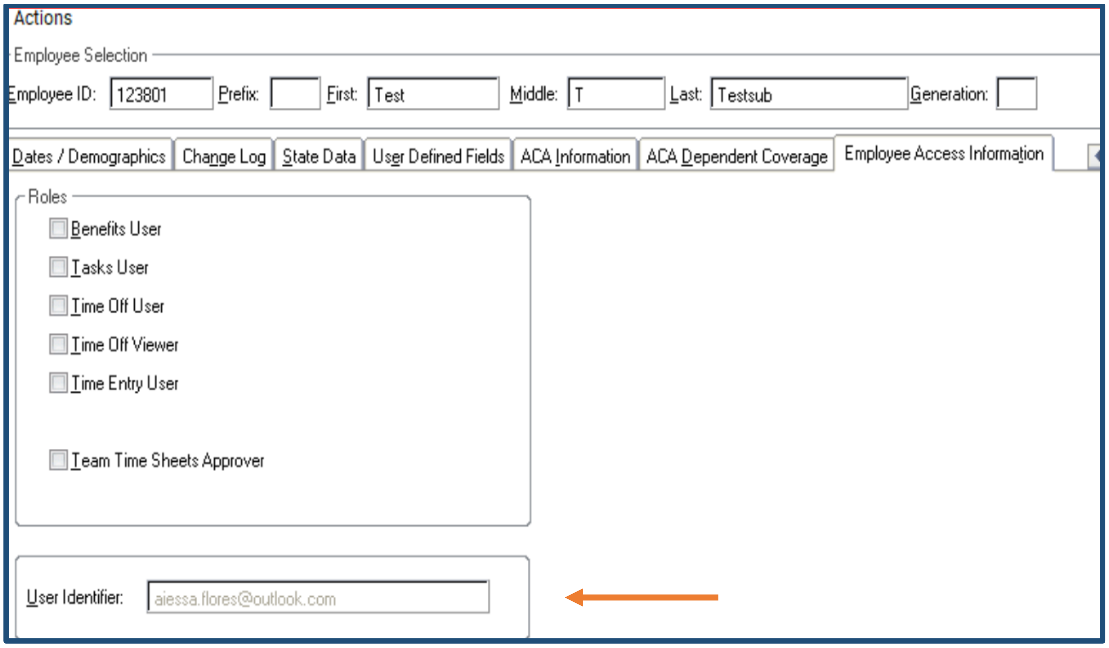
More about the sign up process for Former Employee Access is covered in the Registration and Login section at the beginning of this guide.

Once the former employee successfully registers, they can view:

- Recent paychecks
- Tax documents
- Current address information

These documents can be viewed and/or downloaded, using the corresponding buttons.

Also, once a former employee creates an account in Former Employee Access, administrators can view the email address they are now using as their username in the User Identifier field of Employee Maintenance, as seen below.



SECTION 5 SUMMARY

Former Employee Access provides key information for former employees, making it an asset to workflow and elimination of unnecessary contact from former employees.