Employee Portal - User Guide for Employees

The Employee Portal is a Web-based portal offering employees access to their payroll information via the Internet. Through the portal, employees can

- view and print payroll vouchers and W-2s
- access their demographic data
- request time off, and
- view paid time-off balances.

The Employee Portal can be used on tablets and mobile devices.

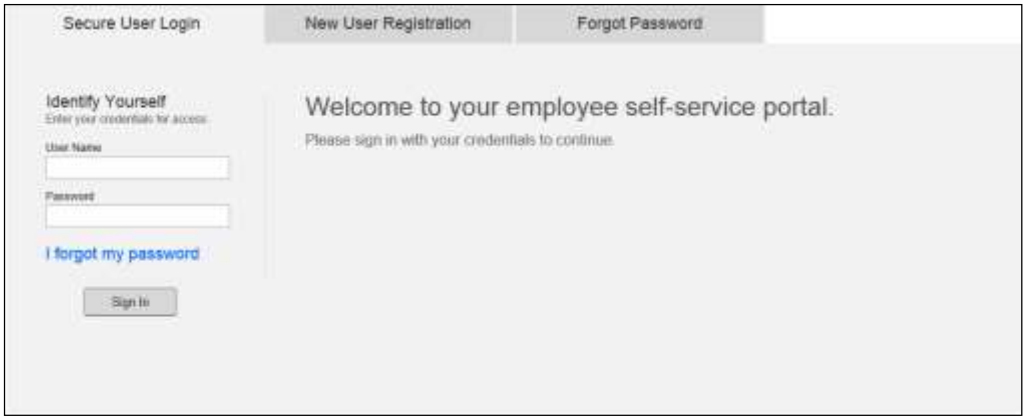
Our applications are designed to leverage the features of the most current browser versions. For the best possible experience, we recommend that you use one of the browsers listed below.

Topics in this User Guide include

- Logging into the Employee Portal
- Dashboard
- Navigation Buttons
- Your Info
- Pay
- Resources
- Time Off
- Messages
- Benefits

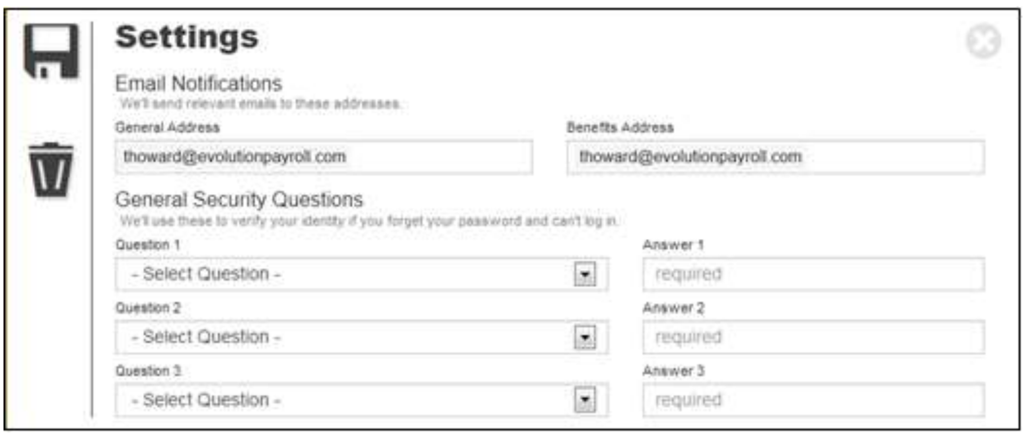
Logging into the Employee Portal

1. Open a Web browser and enter the URL provided by iSystems for access to the Employee Portal.
   Result: The Login screen opens to the Secure User Login tab.



2. Enter the Username and Password assigned by the Administrator.
3. Click **Sign In.**

Result: The Settings screen opens, on which are Security Questions the user must set up for future login.



4. Select three General Security Questions from the dropdown lists and enter the answers on the right.
5. Select two Extra Security Questions from the dropdown lists and enter the answers on the right.
6. Click the **Save** button in the Navigation pane.

   Result: the Employee Portal Dashboard opens.

Note: The next time the user logs in, the user will be required to answer two of the security questions.

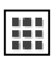
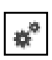
Dashboard

Employee Identification

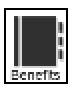
The employees' first and last name displays in the header when logged into the portal.

Navigation Buttons

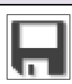
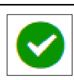
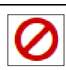
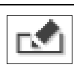
The buttons in the upper right corner of the Dashboard are used to navigate the application.

Button	Description
	Home button. Click this button from anywhere within the Employee Portal to return to the Dashboard.
	Menu button. Click this button to access shortcuts to screens within the Employee Portal.
	Help button. Displays contact information for payroll and HR assistance. An ESS Contact and/or HR user must be set up for contact information to display here.
	Settings menu. Click to update email addresses, passwords, and change extra security questions.
	Exit the program.

Menu Button
The Menu button includes buttons that coincide with the tiles (sections) on the Dashboard.

Button	Description
	Displays the employee's personal information, including address, phone, email address, employee number and hire date.
	Displays the employee's paystub. W-2s and 1099s can also be viewed on this screen.
	Displays messages sent to the users by managers. Also, messages for managers, generated when an employee's Time off Request or Personal Information changes require approval are displayed here. Unless a user is a manager, the messages are read-only.
	Displays links to resources, such as Benefit Companies or Tax Websites. These links are established by users with management rights.
	Displays time off balances and facilitates time off requests.
	Displays a list of benefits in which the employee is enrolled. This button can also be used to access the Benefits Selection Screen when enrollment is active for the new employee or during Open Enrollment for existing employees.

Other key buttons and symbols

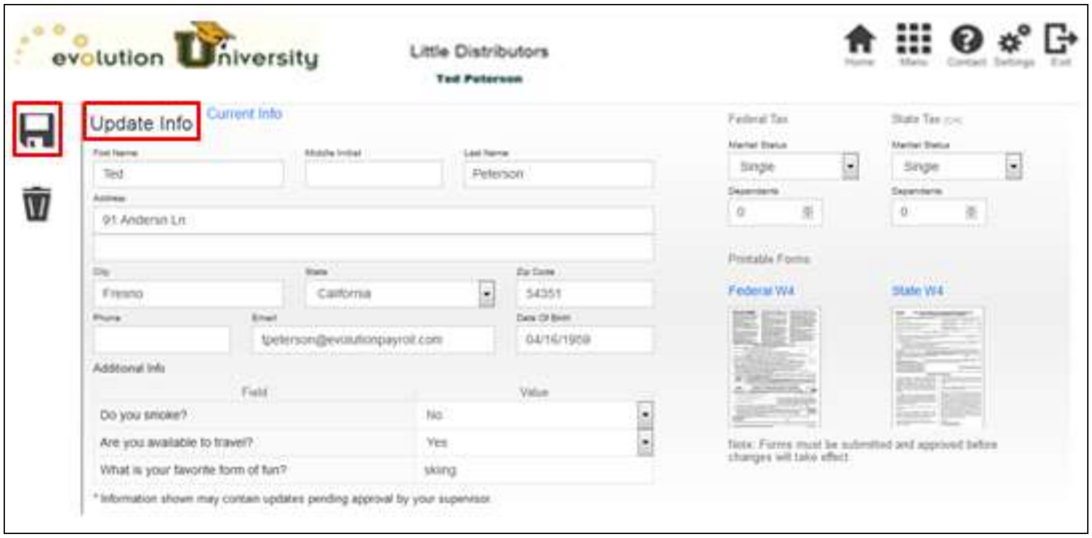
Button	Description
	Save button. Click to save changes made to information, or to submit Time Off or Personal Info change requests.
	Cancel or Trash button. Click to cancel and discard changes.
	Approve/Accept button . Approve or accept Time off Requests and Personal Info Changes.
	Decline/Reject button. Decline or reject Time off Requests and Personal Info Changes.
	Ellipsis button. Click to go to the full screen for that topic.
	Edit button. Click to edit information on the Resources page.

Dashboard Features

Your Info

1. Click the **Your Info** button in the Menu or the **Ellipsis** ••• on the Your Info tile to open the Current Info screen.
2. Employees with Full Access can edit this information and submit it for approval.
3. Click **Update Info** at the top of the Current Info screen

4. Update the information as needed.



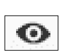
5. Click the **Save** button in the Navigation pane on the left-hand side of the screen when the update is complete.

   Result: A message is sent to the Manager, advising him/her that a Personal Info Change has been submitted.

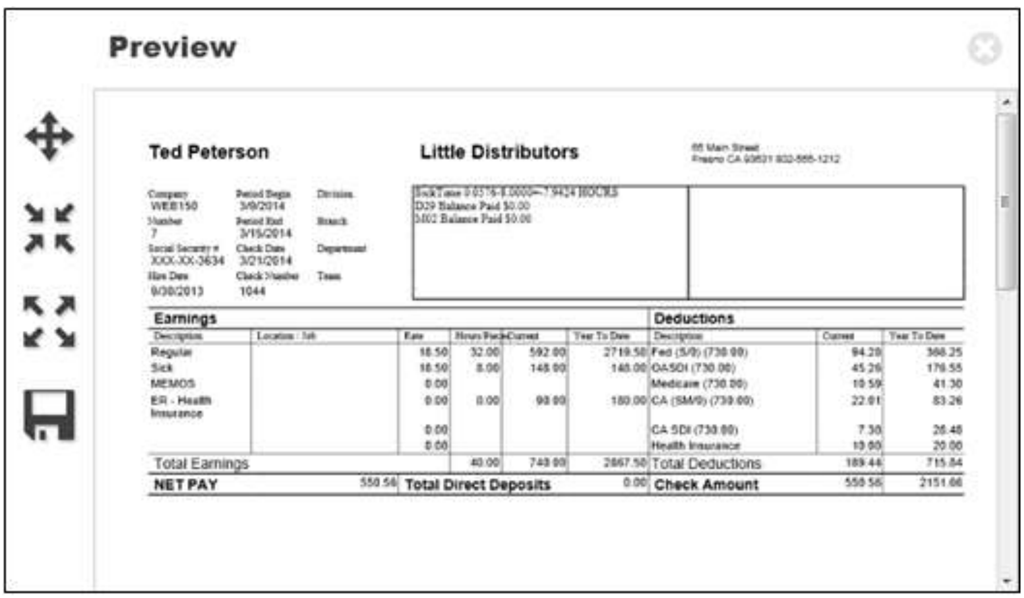
6. Click **Current Info** to return to the Current Info screen.

Pay

The Pay tile displays the employees' last three check stubs as well as the most recent annual tax form generated for the employee.

1. Click the check date to display and download the paystub for that check date.
2. Click the **eye**  button next to the check date to display the gross amount for that check.
3. Click the **W-2** link to display and download the most recent W-2.

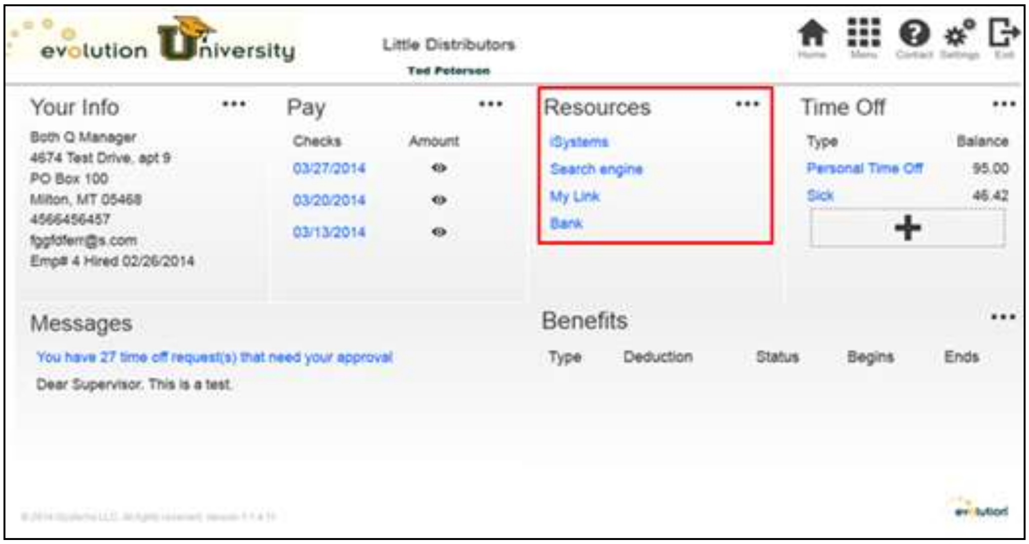
4. Click the **Pay** button in the Menu or the **Ellipsis** ••• on the Pay tile to open the Pay screen directly.
5. Select the Year on the left-hand side of the screen to display Pay Statement and W-2 information for that year.
6. Click the **Check Date** to display the Paystub for that check date.



7. Use the buttons on the left to zoom in and out.
8. Click **Save** to download and save the pay statement.
9. Click the **W-2** link to display the most recent W-2 for the time period selected.
10. Click **Save** to download and save the W-2.

Resources

The **Resources** tile provides links for employees to access information about company benefits quickly and easily. Click the link to go to the screen set up for this resource.



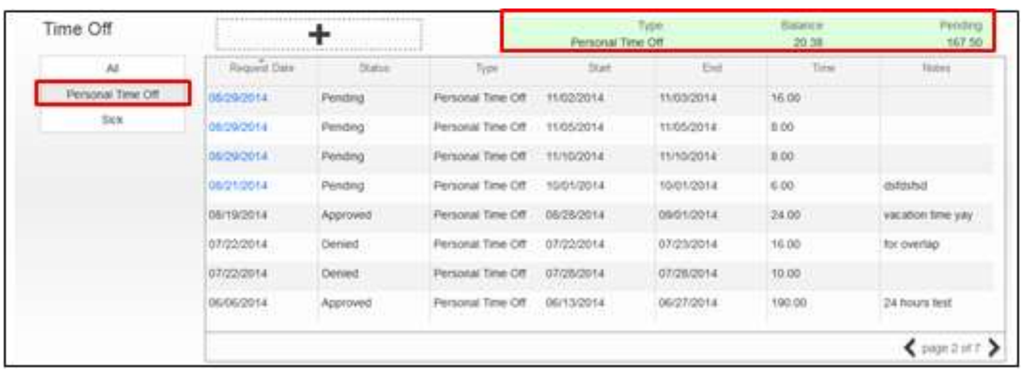
1. Click the **Resources** button in the Menu, or the **Ellipsis** button on the **Resources** tile to open the Resources screen.

Time Off

The Time Off screen shows the Time Off request history for the employee.

1. Click the **Time Off** button in the Menu or the **Ellipsis** --- on the Time Off tile to open the Time Off screen.

   Result: The Time Off page displays the types of Time Off that are available to the employee, based on the companies' Time Off Accrual setup.



2. Click the **Time Off** type on the left-hand side of the screen to display the Balance, Pending, Accepted, Denied, and Used time off for each type.

Submitting a Time Off Request

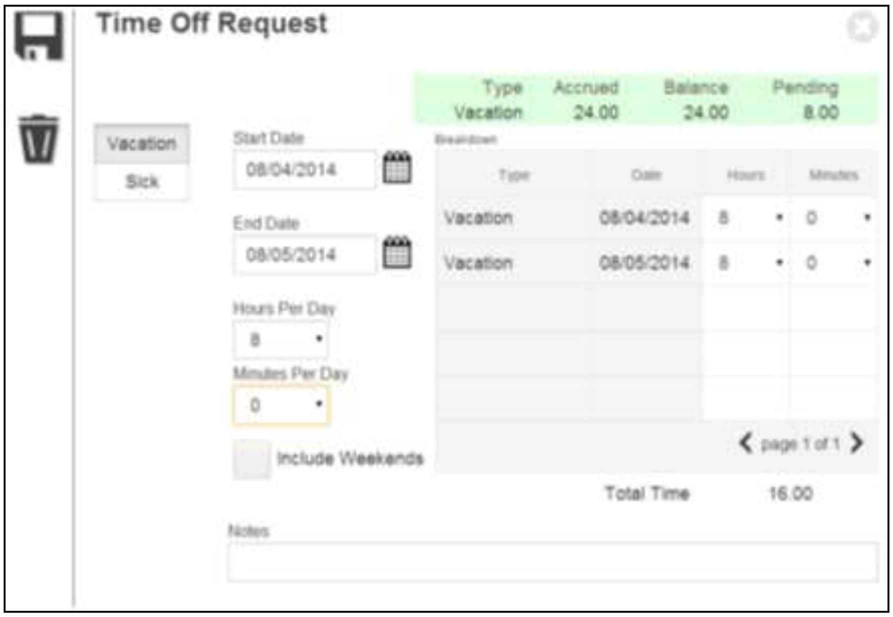
To submit a Time Off Request

1. Click the large **plus sign** at the bottom of the Time Off tile on the Dashboard or at the top of the Time Off screen.
2. Select the type of Time Off Request (Personal time, sick time, etc.)
3. Select the **Start Date** and **End Date** of the time off period.

Once the dates are entered, the days are listed in the list on the right, where the hours can be edited as needed. Each date is listed on a separate line and totaled at the bottom.

4. Enter the **Hours per Day** requested.
5. Select the **Include weekends** checkbox if the time request includes weekend days that would normally be worked.
6. Enter any notes, if necessary.
7. Edit hours on the right side of the screen, if applicable.
8. Click **Save** to submit to your manager for approval.

   Result: The manager receives a message, and your request is added to the total number of requests awaiting approval.



Messages

Two Messages are viewable for all employees in a company. Messages in the Employee Portal can only be added to or updated by Managers.

Note: Messages are not specific to Manager Groups. If a manager updates or changes messages, all company employees will see the change.

To update messages

1. Click the **Messages** button in the menu or the **Ellipsis** button to open the Messages screen.
2. Update the Messages as needed.

3. Click the **Save** button in the Navigation pane to complete the changes.

Benefits

Current Benefits information is displayed on the Benefits tile. During Open Enrollment, users will see a message on the Benefits tile giving them a countdown to when enrollment ends.

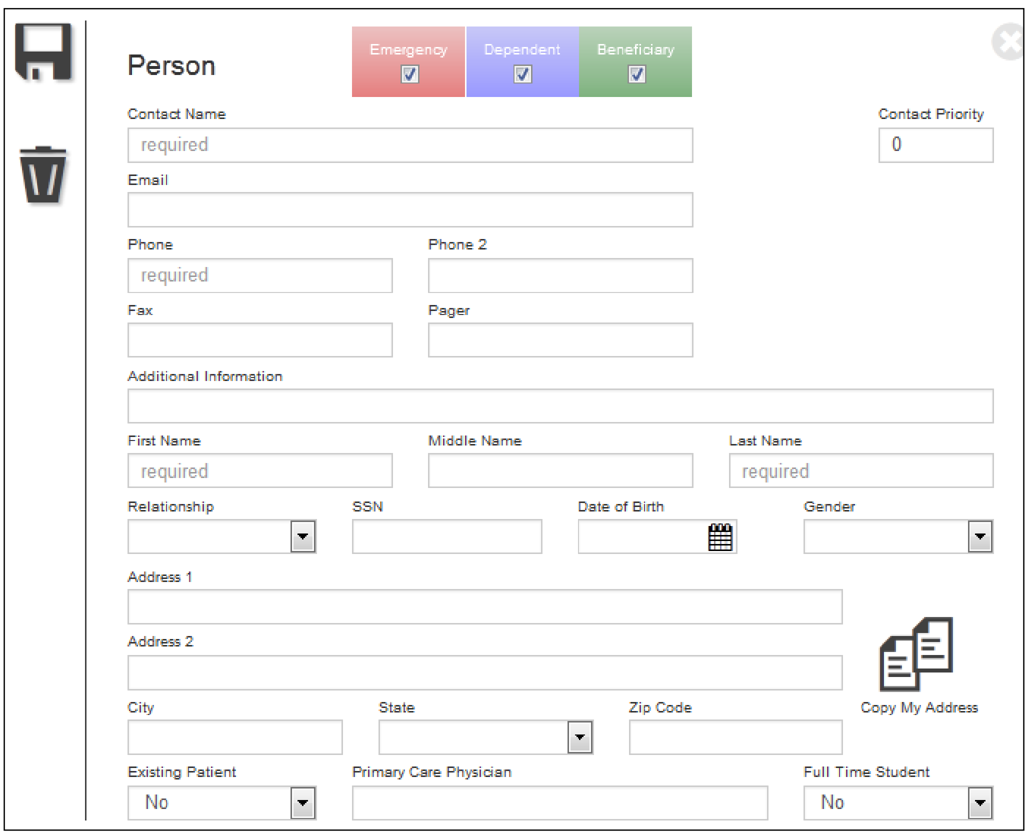
Note: For information about the Benefits Enrollment process, refer to the Employee Portal Benefits Enrollment Guide.

1. Click the **Benefits** button in the Menu or the **Ellipsis** on the Benefits tile to open the Benefits screen and view additional information about current benefits as well as Dependent, Beneficiary, and Emergency Contact information.

The left-hand side of the Benefits screen displays current benefit information. Emergency Contacts, Dependents, and Beneficiaries can be viewed or added on right side of the screen under the People heading.

To add a person as an Emergency Contact, Dependent, or Beneficiary:

1. Click the large **plus sign** under the People heading.



2. Select the checkbox below the category of which the person is being added. Multiple categories can be selected for one person.

Note: Additional information may be required depending on the category selected for the person being added to the list.

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3. Complete the information in the screen below. Click **Copy My Address** if the person being added shares the same address as the employee.
4. Click the **Save** button in the Navigation pane to complete the changes.