

Employee Portal - User Guide for Managers

This User Guide is designed as a tool for managers responsible for approving employee changes and time off requests in the Employee Portal.

The following items are handled by a Manager:

- [Message Notifications](#)
- [Personal Info Change Requests](#)
- [Time off Requests](#)
- [Time Off Analysis Table View](#)
- [Resource Management](#)

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.



Initial Login to 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.

A screenshot of the 'Secure User Login' page. At the top, there are three tabs: 'Secure User Login' (selected), 'New User Registration', and 'Forgot Password'. The main content area is split into two columns. The left column is titled 'Identify Yourself' and contains the text 'Enter your credentials for access.' Below this are two input fields: 'User Name' and 'Password'. There is a blue link that says 'I forgot my password' and a 'Sign In' button. The right column contains the text 'Welcome to your employee self-service portal.' and 'Please sign in with your credentials to continue.'

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 on the left-hand side of the screen.

Result: the Employee Portal Dashboard opens.

Note: The next time the user logs in, two of the security questions will require answering.

Dashboard

Type	Plan	Coverage
Health	BCBS	EE Only
HSA	HSA Single	Employee Defined

The Dashboard is divided into up to six tiles plus the Header, on which the Company's logo, employee's name, and the Navigation buttons are located. All of the information that the manager sees on the Dashboard is his/her own – not those of the employees.

Service Bureau Logo






Logo that the Service Bureau or Payroll Provider submitted to iSystems to customize the Employee Portal site.

Employee Identification

The manager's first and last name displays in the Header when logged into the portal.







Navigation Buttons




There are several buttons in the upper right corner of the Dashboard 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

The Menu button includes shortcuts that coincide with the tiles (sections) on the Dashboard. The three buttons at the end are only available to users set up as Managers.

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.

Button	Description
	Notifies Managers of Personal Info Change Requests requiring attention/approval. Click to open the Employee Changes screen.
	Notifies Managers of Time Off Requests requiring attention/approval. Click to open the Time Off Requests screen.
	Opens the Time Off Analysis tool, to consider conflicts with other scheduled employee time off prior to approval.

Manager Approvals

Employees who are also managers may have additional access in the Employee Portal. Managers can update the messages that are seen in the Messages tile as well as update the links listed on the Resources tile. In addition to this, managers may be required to approve Time Off Requests or Personal Information change requests.

Information about items requiring approval are displayed in the Message Tile on the Dashboard.

Message Notifications

Managers have the rights to update messages in the Messages tile. Employees can see up to 2 important messages for a company.

To update messages:

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



3. Click the **Save** button in the Navigation pane.

In addition, messages are created and updated as employees submit Personal Info change requests and Time Off Requests via the Employee Portal. Group Managers are the only users who see these messages as links in the Messages tile, on which they click to accept or reject the requests.



There are two items requiring approval for which managers may be responsible:

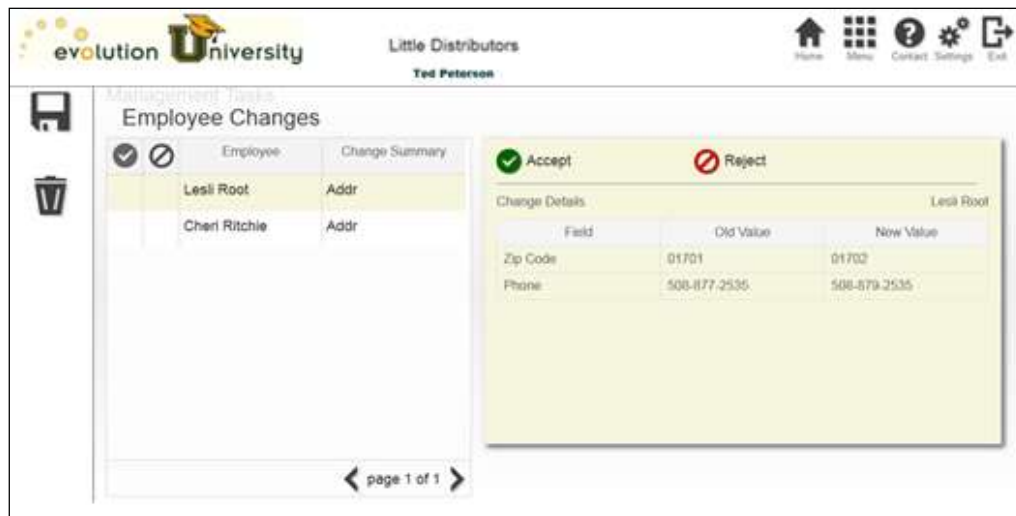
- Personal Information Change Requests, and
- Time Off Requests.

Personal Info Change Requests

Information change requests include changes employees make to their demographic data, such as address and phone number, or updates to W-4 information. Once submitted, the change request does not take effect until the manager accepts it.

1. Click the applicable link in the Messages tile on the Dashboard or click the **Info Change** button in the Menu.

Result: The screen listing all of the pending Time Off Requests opens.



2. Click each employee in the list on the left-hand side of the screen to view the change details. The change request(s) appear on the right with the Field name, Old Value, and New Value.
3. Click **Accept** **Accept** or **Reject** **Reject**.
4. Click the **Save** button in the Navigation pane.

Result: The employee receives an email that the Manager has Accepted his/her changes; the employee's information is changed in the Employee Portal; the message disappears from the manager's dashboard, and the changes are posted in evolution.

Note: Updates to employees' W-4 Information require that they submit a new W-4 form before the change is accepted.

Time Off Requests

Managers who are responsible for Accepting or Rejecting Time Off Requests will have access to the Time Off Request Approvals pages of the Employee Portal.

To Accept or Reject Time Off Requests:

1. Click the applicable link in the Messages tile on the Dashboard or click the **Time Off Requests** button in the Menu.
2. Click each employee in the list on the left-hand side of the screen to view the change details (if there is more than one request).

The time off request(s) appear on the right with the dates, hours, and potential conflicts.


The screenshot displays the 'Time Off Requests' interface. On the left, there is a table with columns for Employee, Start, and Time. The table contains two entries: Andrew Connor (08/04/2014, 40.00) and Janis Lewis (08/04/2014, 8.00). On the right, there is a detailed view for Andrew Connor's request, showing 'Vacation 40hrs' for the period 08/04/2014-08/08/2014. Below this, there is a 'Conflicts' section for Janis Lewis and a 'Recent Activity' section listing several vacation requests with their respective dates and durations. At the bottom of the interface, there are navigation buttons for 'Accept', 'Reject', and 'Analyze', and a 'page 1 of 1' indicator.

3. Also displayed is Recent Time Off Activity for that employee and any conflicts with other employees time off requests this request creates.
4. Click **Accept** or **Reject** for the each Time Off Request.
5. Click the Save button to save the requests.

Note: Time Off Requests will not be listed as **Accepted** or **Rejected** until the manager saves using the Save button.

Time Off Analysis

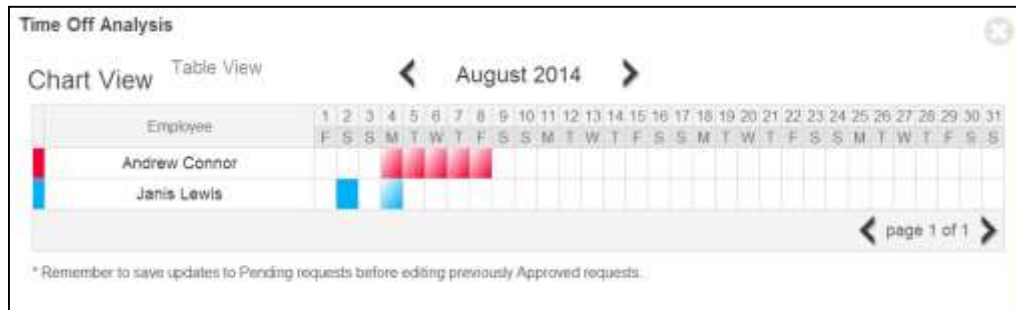
The **Time Off Analysis** tool can be used to help the manager see each of the employees who have submitted time off requests during a month period. It displays time off requests in both a chart view and a table view.

To access the **Time Off Analysis** tool, the manager may click on the **Time Off Analysis** button from the Menu, the **Analyze**  button from the **Time Off Request**, or the **Conflicts** link from the **Time Off Request** if a conflict exists.

Time Off Analysis Chart View

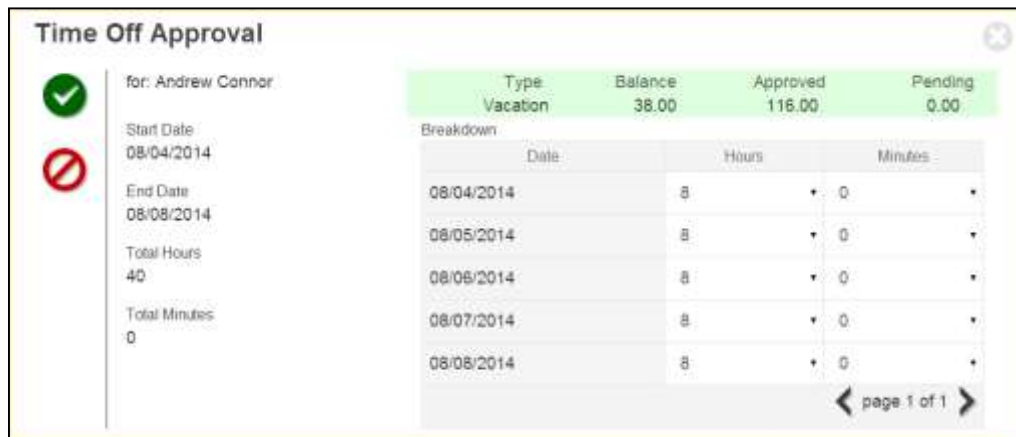
Employees on the Time Off Analysis chart are represented with different colors.

- Accepted Time Off requests are seen as solid blocks of color on the date of the Time Off.
- Pending Time off Requests are seen as gradient blocks of color.
- Denied Requests are not displayed.



To Accept or Reject time off from the Time Off Analysis Chart tool

6. Click the Date requested for an employee to open the Time Off Approval Window.
7. Click **Accept** or **Reject**, OR
8. Click the employee's name to open the Time Off Approval screen and view the original Request with a breakdown by date.



9. Make any applicable changes and approve or reject the Time Off Request and go back to the Time Off Analysis tool.
10. Repeat Step 4 until all items have been reviewed
11. Click the to close the Time Off Analysis tool.
12. Click the **Save** button in the Navigation panel on the left-hand side of the screen.

Time Off Analysis Table View

The Time Off Analysis tool can also be viewed in Table view.

1. Click **Table View** at the top of the Time Off Analysis tool.



2. The table view displays Pending, Approved, and Denied Time off Requests.

Time Off Analysis



Table View Chart View

Employee	EE#	Status	Request	Start	End	Time	Balance	Type	Notes
Filter Criteria									
				>=8/1/2014	<=8/31/2014				
Andrew Connor	2	Pending	08/02/2...	08/04/2...	08/08/2...	40.00	52.00	Vacation	
Janis Lewis	4	Denied	08/02/2...	08/04/2...	08/04/2...	8.00	52.00	Vacation	
Janis Lewis	4	Approved	08/02/2...	08/02/2...	08/02/2...	8.00	52.00	Vacation	

Filter: Start>=8/1/2014, End<=8/31/2014

page 1 of 1

* Remember to save updates to Pending requests before editing previously Approved requests.

Note: Accepted or Denied Time off Requests that have not been saved are seen as Pending with a  or  next to the status. Click the name of the employee with a Pending or Accepted Time off Request to view the details of the request.

Resource Management

Resource links are managed by the Group Managers. Resources are links to frequently-used sites such as Health Insurance providers or to the company's Website. Up to 5 links can be listed here.

To add or update:

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



2. Click the **Edit** button in the Navigation pane on the left-hand side of the screen to add or edit a resource and its link.



3. Add or edit resources and their URLs
4. Click the **Save** button in the Navigation pane, which is displayed once the user is in Edit mode.

Note: Links to download the Federal and State W-4 forms can be added in the Resources page as well. Once they are listed here, they are available when editing the information on the **Your Info** page.