Employee Self Service (ESS)

Version 2.12.0
Employees can...

- access from any computer.
- view their elected withholding, earnings summary, check history, company documents, leave balances and leave history.
- request changes to their demographics, direct deposits, W4 and state tax withholding forms.
- upload documents for demographic and direct deposit request.
- print past check information.
- print W2s for past years.
Employee Self Service – Register

Registration and Forgot Password on Log In screen

Enter Web Address for ESS into your browser.

Everyone must register as a user for ESS using their social security number and employee number.

NOTE: Internet Explorer version 9 and below are not supported in ESS. The Internet Explorer browser must be version 10 or above.
All employees must create an account in ESS.

Employee chooses their own User Name and Password. User name should not contain any special characters or spaces.

Social Security Number and Employee Number combination is validated in the payroll system.

Email address will be used to send all notifications from ESS. This does NOT have to be a school district assigned email address. It may be an employee’s personal email address.

An email, with a confirmation link, will be sent to the email address the user provided when creating their account. User must use the confirmation link in the email to be confirmed as an authorized user for ESS.
If a registered employee forgets their password, they can use the *Forgot Password* to receive an email with a link that allows them to enter a new password. The *Forgot Password* will not work if the employee’s account has not been confirmed (see previous screen).

Once the employee has been confirmed as a user, they can login in with their user name and password.
Home screen menu will have Home–Employee and About ESS. The Home-Employee menu opens to other menu options. Employee will follow the links to the menu options they want. If user is an Administrator for ESS, they will also see Site Administration in their Home screen menu options.
Employee Self Service - Task List

Employee can view or cancel pending requests and view past requests.

Completed Requests (approved or rejected) can be viewed by the employee with the View My Past/Current Requests.

Pending requests (unapproved) can be cancelled by the employee.
Employee Self Service – Task List

An employee who is also an Approver will have both their requests and the Approver Tasks displayed on their Tasks menu.

The Approver can approve or reject pending requests from employees on the Task List menu under Approver Task.

Approvers can view request history with the View Completed Approver Tasks.

Completed requests (approved or rejected) can be viewed by the employee with the View My Past/Current Requests.

Home-Employee

About ESS

Task List

Personal
Employee Self Service—Personal/Payroll Inquiry

The Personal menu contains the sub-menu for Payroll Inquiry which includes the Inquiries available for the employee.
The Deduction Inquiry allows for viewing and printing the employee and employer cost for employee elected deductions.

### Payroll Deductions

#### User Instructions

Insurance elections can only be changed during open enrollment with the exemption of life changing events such as the birth of a child, death, divorce, retirement. See your insurance handbook for further explanation of life changing events.

<table>
<thead>
<tr>
<th>Deduction</th>
<th>Employee Cost</th>
<th>Employer Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAT INSURANCE</td>
<td>$0.00</td>
<td>$780.00</td>
</tr>
<tr>
<td>RETIREMENT WITH</td>
<td>7.5000 %</td>
<td>11.9400 %</td>
</tr>
<tr>
<td>AlaTrust Credit Union</td>
<td>$100.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>AMERICAN FAMILY LIFE INS</td>
<td>$21.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>LIBERTY NATIONAL INS</td>
<td>$224.75</td>
<td>$0.00</td>
</tr>
<tr>
<td>PRE-PAID LEGAL SERVICES, INC.</td>
<td>$16.95</td>
<td>$0.00</td>
</tr>
<tr>
<td>LIFE INS COMPANY OF ALABAMA</td>
<td>$49.77</td>
<td>$0.00</td>
</tr>
<tr>
<td>PUBLIC ED EMP HEALTH INS PRO</td>
<td>$16.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>LIBERTY NATIONAL INSURANCE</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>SECURITY BENEFIT-457</td>
<td>$25.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>HEALTHCARE SPENDING ACCT.</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
Employees can view and print their earnings summary by selecting the year they wish to view.
If the district uses Harris School Solutions' Document Services product to produce their W2 records, the employee can view and print their W2 for the selected year.
Employee Self Service – View Pay Checks

Employee can view and print check/statement summary for a specific check date range. The employee can view check detail by clicking on a particular check.

Select date range and click Search to list pay records. Select check number from list to view pay record.

<table>
<thead>
<tr>
<th>Date</th>
<th>Number</th>
<th>Date</th>
<th>Gross</th>
<th>Net</th>
<th>Pay Adj/Sub Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/31/2015</td>
<td>133504</td>
<td>05/31/2016</td>
<td>$2,248.58</td>
<td>$1,190.99</td>
<td></td>
</tr>
<tr>
<td>04/29/2016</td>
<td>133505</td>
<td>04/29/2016</td>
<td>$2,286.58</td>
<td>$1,217.66</td>
<td></td>
</tr>
<tr>
<td>03/31/2016</td>
<td>133174</td>
<td>03/31/2016</td>
<td>$2,258.58</td>
<td>$1,197.86</td>
<td></td>
</tr>
<tr>
<td>02/29/2016</td>
<td>133011</td>
<td>02/29/2016</td>
<td>$2,298.58</td>
<td>$1,224.23</td>
<td></td>
</tr>
<tr>
<td>01/31/2016</td>
<td>132655</td>
<td>01/31/2016</td>
<td>$2,328.58</td>
<td>$1,244.23</td>
<td></td>
</tr>
<tr>
<td>12/18/2015</td>
<td>132689</td>
<td>12/18/2015</td>
<td>$2,298.58</td>
<td>$1,223.44</td>
<td></td>
</tr>
<tr>
<td>11/20/2015</td>
<td>132524</td>
<td>11/20/2015</td>
<td>$2,308.58</td>
<td>$1,230.10</td>
<td></td>
</tr>
<tr>
<td>10/30/2015</td>
<td>132369</td>
<td>10/30/2015</td>
<td>$2,448.58</td>
<td>$1,323.13</td>
<td></td>
</tr>
<tr>
<td>09/30/2015</td>
<td>132208</td>
<td>09/30/2015</td>
<td>$2,278.58</td>
<td>$1,210.20</td>
<td></td>
</tr>
<tr>
<td>08/31/2015</td>
<td>132074</td>
<td>08/31/2015</td>
<td>$2,468.58</td>
<td>$1,336.35</td>
<td></td>
</tr>
<tr>
<td>07/31/2015</td>
<td>131943</td>
<td>07/31/2015</td>
<td>$2,458.58</td>
<td>$1,329.69</td>
<td></td>
</tr>
<tr>
<td>06/30/2015</td>
<td>131756</td>
<td>06/30/2015</td>
<td>$2,308.58</td>
<td>$1,230.10</td>
<td></td>
</tr>
</tbody>
</table>
Employee Self Service – View Pay Checks

If an employee has extra pay, pay adjustments or substitute pay for a specific check, they can view detail information about the pay by clicking on Adjusts/Sub Details link.
Employee Self Service – View Pay Checks

Employee’s detail check information can be displayed and printed.
If the district is using Harris School Solutions' Document Service product to produce their checks and statements, the check/statement detail will display as a copy of the original check/statement. The employee can also print a copy of the displayed check/statement.

Employee Self Service – View Pay Checks

Print toolbar is at bottom of check display.
Employee Self Service—Personal/Payroll Changes

The Personal menu contains the sub-menu for Payroll Changes which includes a menu of all change options available to the employee.
Employee can request changes to a variety of demographic fields and upload multiple documents to be submitted with their change request. Both the employee and the approver can print the attached documents from the pending or completed request/task.

If employee has a pending request, their demographics will be displayed with the requested changes. The employee can change all demographic data.

NOTE: A change to the email address on the demographic screen changes the email address in the payroll system which may be used by the school district when corresponding with the employee. It does not change the email address for the ESS notifications which was entered when the employee registered for ESS.
Employees can submit requests to add, delete, or change direct deposit accounts.

If changing a routing number or the amount to deposit, click in the field, make the change and click submit.

If adding a new account, click on Add New Record, enter the information for the new account and click submit. Note: There can be only one primary account per employee.

If you are trying to delete a direct deposit, click on the Delete button beside the account information and then click submit.
Pending changes are displayed and employees can upload files for direct deposit requests.

If employee has a pending request, their direct deposit information will be displayed with the requested changes. The employee can change all pending direct deposit data.

Multiple files can be selected from multiple directories. Acceptable file formats include .gif, .jpg, .jpeg, .png, .doc, .docx, .xls, .xlsx, .pdf, .txt.
Employee Self Service – Tax Withholdings

Tax Withholding under the sub menu Payroll Changes will include your State Withholding and W-4 Withholding Forms.
Changes can be made to the employee’s A4 with an electronic signature.

Employee’s current State withholding information is displayed.

Employee can view additional instructions for the A4 by clicking the A4 Instructions button.

Electronic signature and date must be exactly as displayed – no extra spaces, dashes or periods.

If requesting a change for A4, the employee must enter ALL information on the A4 form, not just the change.
Employee Self Service – G4 (Georgia)

Changes can be made to the employee’s G4 with an electronic signature.

- Employee’s current State withholding information is displayed.
- Employee can view instructions for the G4 by clicking the G4 Instructions button.
- If requesting a change for G4, the employee must enter **ALL** information on the G4 form, not just the change.
- Line 5 - Additional Allowances is updated from the worksheet entries and the Update Line 5 button.
- Electronic signature and date must be exactly as displayed – no extra spaces, dashes or periods.
Changes can be made to the employee’s MS4 with an electronic signature.

Employee’s current State withholding information is displayed.

Employee can view instructions for the MS4 by clicking the *MS4 Instructions* button.

If requesting a change for MS4, the employee must enter **ALL** information on the MS4 form, not just the change.

The **Total Amount of Exemption Claimed** will be the total of selected status amount, dependent amount and additional allowances.

Electronic signature and date must be exactly as displayed – no extra spaces, dashes or periods.

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**Mississippi Employee’s Withholding Exemption Certificate**

<table>
<thead>
<tr>
<th>Employee’s Name</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>DIANA MCNIELL</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employee’s Residence Address</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2417 Burke Street</td>
<td></td>
</tr>
</tbody>
</table>

**User Instructions**

Please print a copy of your new form from your pending request or completed requests.

- **Save** to save changes.
- **Back** to go back.

**Employee’s current State withholding information is displayed.**

**Employee can view instructions for the MS4 by clicking the **MS4 Instructions** button.**

**If requesting a change for MS4, the employee must enter **ALL** information on the MS4 form, not just the change.**

**The **Total Amount of Exemption Claimed** will be the total of selected status amount, dependent amount and additional allowances.**

**Electronic signature and date must be exactly as displayed – no extra spaces, dashes or periods.**
Changes can be made to the employee’s W4 with an electronic signature.

Employee’s current Federal and State withholding information is displayed.

IRS instructions and worksheet are accessible from W4 form.

If requesting a change for W4, the employee must enter ALL information on the W4 form, not just the change.

Electronic signature and date must be exactly as displayed – no extra spaces, dashes or periods.
Employee Self Service – Leave

Leave Menu allows the employee to see their leave history and leave balances.
Employee can view and print their current leave balances. The leave earned and used are reflective of the last completed payroll.

### Leave Balance Summary - 2016

<table>
<thead>
<tr>
<th>Description</th>
<th>Hrs/Days</th>
<th>Accum. Rate</th>
<th>Prior Yr. Bal.</th>
<th>Current Earned</th>
<th>YTD Used</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - SICK - CENTRAL OFFICE</td>
<td>D</td>
<td>12</td>
<td>264</td>
<td>11</td>
<td>17</td>
<td>258</td>
</tr>
<tr>
<td>2 - PERSONAL - CENTRAL OFFICE</td>
<td>D</td>
<td>6</td>
<td>0</td>
<td>5</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>3 - VACATION - CENTRAL OFFICE</td>
<td>D</td>
<td>10</td>
<td>18.5</td>
<td>10</td>
<td>5.5</td>
<td>23</td>
</tr>
<tr>
<td>SB - SICK BANK - CENTRAL OFFICE</td>
<td>D</td>
<td>999</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>5</td>
</tr>
</tbody>
</table>
Employee can view and print their detail leave history for a specific date range.
View Company Documents allows employees view and print any documents uploaded by the Document Administrator. This is a great way to give employee access to Policy and Procedure Manuals, retirement documents, and Open Enrollment documents.
Employee can view and print documents that their District has placed in Company Documents by clicking the category and selecting the document.
The *About ESS* Menu option identifies the Product Version and the District. The District’s contact information for Employee Self Service can also be displayed here.
Employee Self Service – Manage Account

An employee can manage their ESS account by clicking on their user name in the toolbar.

Employee clicks on their user name to manage their account.

The employee can change their password by entering their current password and the new password.

The employee can change the name and email address associated with their ESS account.

The employee can choose not to receive email alerts for requests and approvals in ESS.