Online Payroll

Employee Self Service guide

September 2018

Contents

Introduction

Employee Self Service is an add-on service for Online Payroll that you can use to give your employees access to their payroll-related information, such as electronic pay stubs or payroll history, electronic W-2s, their own demographic information, and more. User roles are used to control what information your employees can view and edit.

Activating Employee Self Service

Work with your service bureau to activate Employee Self Service. When the product is available for your company, your service bureau will give you the access code. In turn, you give the access code to your employees to use when they register their Employee Self Service account.

Your access code is comprised of two numbers: the site ID (your service bureau's ID), and your company code.

Setting up Employee Self Service

To set up employee access to the self-service features, start by making sure that you have the correct role security in place. You'll then assign a role to each employee when setting up their Employee Self Service accounts.

Defining user roles

You can define the roles for each type of user who will access Employee Services. The roles determines which functions the employees can access.

The following roles are available:

- **Administrator**
- **Administrator-Custom**
- **Supervisor**
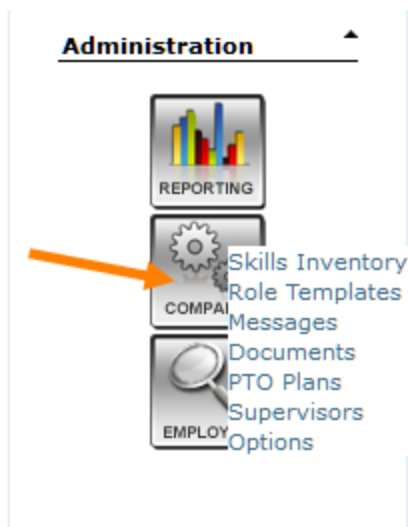- **Supervisor-Custom**
- **Employee**

The Administrator-Custom, Supervisor-Custom, and Employee roles can be modified. The Administrator-Custom role has more restrictions than the Administrator role, and you can further restrict it by denying access to some functions or by making them read-only. The Supervisor-Custom role has access to fewer functions, and the Employee role is the most limited.

To define a user role

1. On the **Employee Services** tab, in the **Control Panel** pane, click the arrow next to Administration.

2. Point to the **Company** button to view the list of options, and then click **Role Templates**.

3. In the **Role Name** list, click the role that you want to modify.

> You can modify the Administrator-Custom, Supervisor-Custom, and Employee roles.

After selecting a role, you'll see a list of functions. The Default column shows the original, default setting. The Override column shows the current setting. If it doesn't match the default setting, you know that it's been changed.

Icon	Meaning
✅	The **Grant** icon indicates that the user can view and edit information within the function.
⚠️	The **Read Only** icon indicates that the user can view the information within the function but not make changes to it.
⛔	The **Deny** icon indicates that the user has no access to the function.

The image below shows the functions for the customized supervisor role.

- The supervisor has the ability to view and edit PTO information. This is the default setting and it has not been overridden, which is indicated by the Grant icon in both the Default and Override columns for the Company Paid Time Off (PTO) function.

- The default permission for the Employee Check/W2 View function is read-only access, which is indicated by the Read Only icon; however...

- The default setting for the Employee Check/W2 View function has been overridden for this role. The supervisor cannot view employee check and W-2 information; this is indicated by the Deny icon.

- You do not have the option to override the default setting for the Employee W4 function or the Employee Dependents function. This is indicated by the lack of an Edit link at the end of the rows.

4. To change the default setting for a function, click the corresponding **Edit** link. The available options

for that function appear.
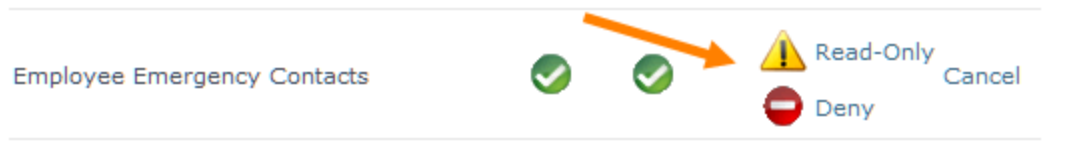
5. Click an option for the function or click **Cancel** to keep the current setting.

6. Continue customizing the roles as needed.

Setting up accounts for self service

Employees can set up their own self-service account with the following information:

- The URL for Online Payroll

- Their employee number

- The company access code

> **Note:** Your company access code consists of two segments separated by a dash. The first segment is your Service Bureau ID, and the second segment is your company code. For example: 1234-9876

Employees are automatically assigned the Employee role when they set up their account.

To learn more about creating an account, see "Signing into Employee Self Service" (page 10).

Administrator and Supervisor accounts

If the employee needs administrator or supervisor rights, an administrator must set up the account and assign the appropriate user role.

To set up an account with Administrator or Supervisor rights

1. On the **Settings** tab, click **Add New**. The wizard is started, and your progress is displayed in the column on the left.

2. On the **Account Information** screen, click **Select Employee**, and select the employee who you are setting up.

> **Important!** You must select an employee who is already set up in the system when creating the account; otherwise, the employee will not be able to access any information. If the employee is not in the system, see Adding a new employee in the help.

3. Enter a user name and password for the employee.

   The password must consist of 8 to 20 characters and contain at least one of each of the following:

   - Capital letter
   - Lowercase letter
   - Digit
   - Special character

4. On the **Company Access** screen, if the user is already associated with a company, it appears in the **Accessible Companies** list. If there is another company in the **Available Companies** list to which the employee should have access, select the company and click **Grant**.

   Click **Next** when you're finished.

5. On the **Functionality Access** screen, select the **ESS** check box, and then click **Next**.

6. On the **Review and Finish** screen, review your selections. You can click **Previous** to go back and make changes if necessary.

   Click **Finish** when you're done. You'll then see the **User Accounts** screen where you can edit your selections and make additional ones.

7. Under **Functionality** in the **ESS** section, locate the role that you want to assign to the employee, and click **Grant Access**.

The employee can now sign in to access the self-service features.

Setting up company timesheets

The Employee Self Services feature includes the option for employees to enter their time worked. To enable this feature, set up timesheets and assign them to your employees.

To set up timesheets for your company

1. On the **Payroll** tab near the top of the page, click **COMPANY**.

2. On the left side of the page, click **Timesheet Setup**.

3. In the **Timesheet Configuration** pane, review the timesheets displayed in the table.

   To filter the list of timesheets:
   In the **Show** field, select **All**, **Active**, or **Inactive**.

   To change an existing timesheet:

   a. Click the name of the timesheet.

b. Make changes in the **Timesheet Configuration** pane, such as the:

- Name of the timesheet

- Earnings that apply to the timesheet

- Additional fields to include on the timesheet

- Effective date of the timesheet

- Number of days that the timesheet is due before the payrun input date

- Whether weekends are included on the timesheet

c. Click **Save**.

To set up a new timesheet:

a. Click **+ ADD NEW** below the table of timesheets.

b. In the **Timesheet Configuration** window, select a pay grid for the new timesheet.

c. Click **Save**.

d. In the **Timesheet Definition** section, type a name for the new timesheet.

e. In the **Earnings** section, select the earnings that apply to this timesheet by clicking the earning in the **Available** list and clicking **Add >**. The earning is added to the **Selected** list.

> **Tip:** You can hold the **Ctrl** key to select multiple earnings at once. You can change the order of the earnings in the **Selected** list by clicking **Up** or **Down**. To remove an earning from the **Selected** list, highlight the earning and click **Remove**.

f. In the **Additional Fields** section, select the check box for each additional field to include on the new timesheet.

g. In the **Settings** section, enter the effective date for this timesheet, enter the number of days that the timesheet is due before the payrun input date, and select whether weekends are included on the timesheet.

h. Click **Save**.

The new timesheet is added to the list of timesheets on the **Timesheet Setup** pane.

To deactivate a timesheet:

a. Click **Deactivate** at the end of the row.

b. Click **OK** to confirm that you want to deactivate that timesheet.

The status of the timesheet changes to **Inactive**.

> **Note:** You cannot deactivate a timesheet that is assigned to employees.

Next Steps: Assign the timesheets to your employees. See "Assigning timesheets to employees" (page 9)

Assigning timesheets to employees

After you set up the timesheets, assign them to your employees.

To assign timesheets to employees

1. On the **Payroll** tab near the top of the page, click **COMPANY**.

2. On the left side of the page, click **Timesheet Assignment**.

3. The **Employee Timesheet Assignment** pane displays a table of your employees. In the **Active Timesheet** column, review the timesheets currently assigned to employees.

4. To assign a timesheet to an employee:

   a. Click the employee name in the table.

   b. In the **Employee Timesheet Assignment** window for that employee, select the active timesheet to assign.

   c. Select the schedule for the employee's timesheet. The employee's paygroup is displayed for reference.

   d. Click **Save**.

      The selected timesheet is now displayed in the **Active Timesheet** column for that employee. The selected schedule is displayed in the **Schedule** column.

> **Tip:** Make sure the employees' assigned role allows them to edit timesheets. To learn more, see "Defining user roles" (page 2).

Using Employee Self Service

The first time you log in to Employee Self Service, you are required to verify your identity, create your user account, and verify your account information.

Signing into Employee Self Service

After your user account is created, you can sign in and access your employment information.

Signing into Employee Self Service for the first time

1. In the Online Payroll sign in page under **New User to Employee Self Service?**, click the **Click here to get started** link.

2. In the **Verify your identity** page of the Employee Self Service portal, enter:

    a. The **Access Code** for your company, provided by your employer.

    > **Tip:** The access code consists of two segments separated by a dash. Be sure to enter the dash when you enter the code.

Step 1. Verify your identity	
Access Code:	1234-9876
Last Name:	Baker
Employee #:	654321
Last 4 of SSN or EIN:	8765

    b. Your last name.

    c. Your employee number.

    d. The last four digits of your social security number (or EIN, if you are a 1099 employee).

3. Click **Next**.

4. In the **Create Your User Account** page, enter:

    a. A user name of your choice.

    b. Your password, following the password requirements shown on the page.

    c. Your email address.

5. Click **Next**.

6. In the **Verify your account info** page:

    a. Verify that the information is correct.

7. Click **Finish**.

8. On the Online Payroll sign in page, you can now use the credentials that you just set up to sign in.

Managing Your Information

If you administrator has given you access to employee self service options, after you sign in and create your user account, you can:

- "Viewing your information " (page 12)
- "Viewing your pay stubs and W-2 forms" (page 13)
- "Adding an emergency contact " (page 14)
- "Adding a dependent " (page 15)

Viewing your information

If you administrator has given you access to employee self service options, you can sign in to view your employment information, such as your contact information, pay rate or salary, and paid time off balance.

To view your information

1. On the **Employee Services** tab, click the **My Info** button.

2. Use the menu on the left side of the screen to select which information you want to view.
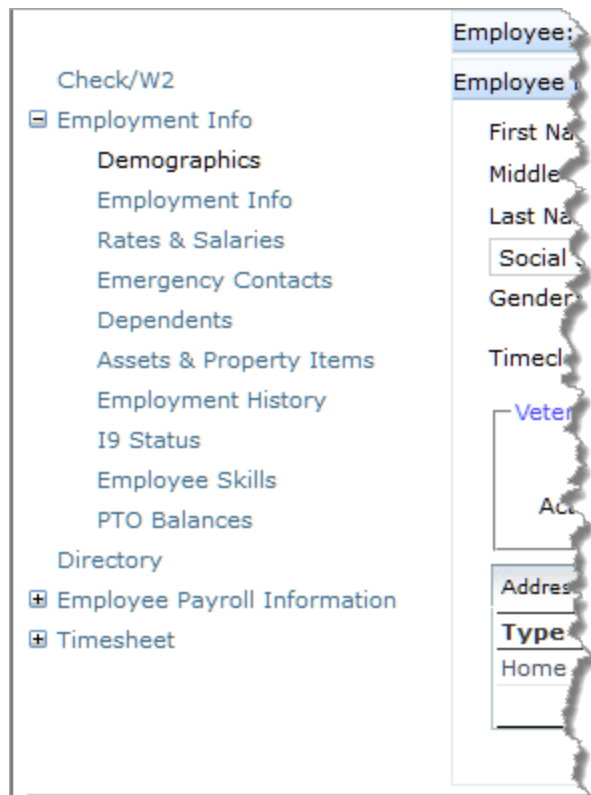
Viewing your pay stubs and W-2 forms

If you administrator has given you access to employee self service options, you can sign in to view your pay stubs and W-2 forms. Depending on the type of employee self service your company uses, you may see either the Employee Services or the Pay View tab when you sign in.

To view a pay stub or W-2 form

1. In the Control panel area, click the **Check W2** button.

2. Click the link for the check or the W-2 form that you want to view.
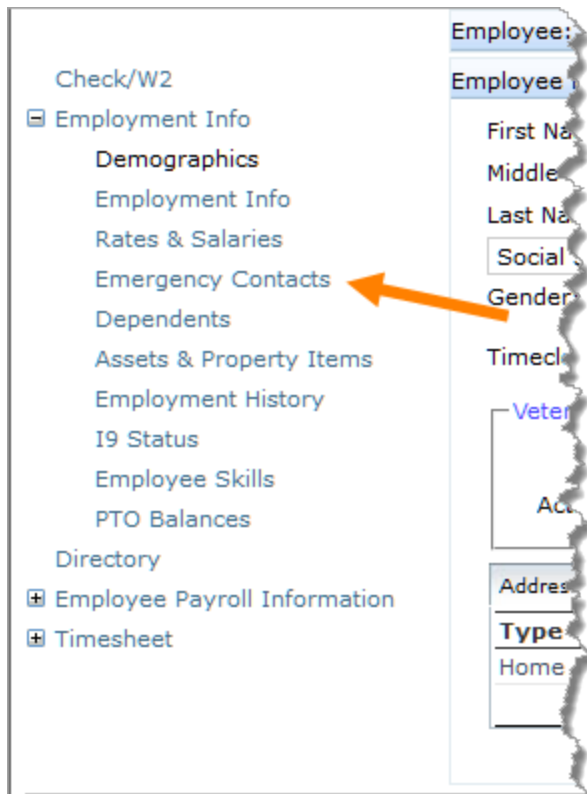
   The document appears in a the Report Viewer tab.

Adding an emergency contact

If you administrator has given you access to employee self service options, you can sign in to add an emergency contact.

To add an emergency contact

1. On the **Employee Services** tab, click the **My Info** button.

2. In the menu on the left side of the screen, click **Emergency Contacts**. **view**

3. In the **Emergency Contacts** area, click **Add New**.

4. Enter your contact's first and last name, and select an option from the **Relationship** list.

5. If this is your primary contact, select the **Primary** check box.

6. Click **Save**.

7. To enter an address for the contact, on the **Address** tab, click **Add New**.

8. Select an option from the **Type** field, and enter the address.

> **Note:** When you enter the first address, you must select the Primary check box. If you add additional addresses, you can designate a different one as the primary address.
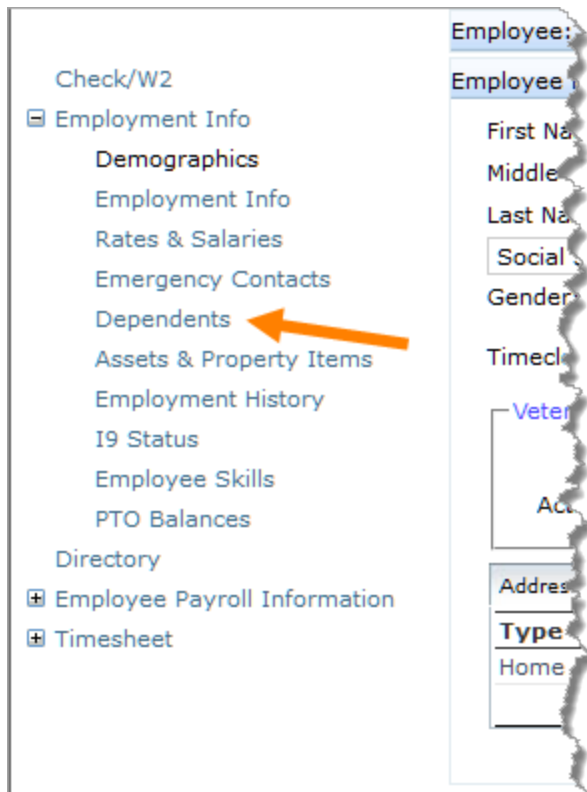
9. Click **Save**.

10. Use the **Phone** and **Email** tabs to enter additional information for your contact.

Adding a dependent

If you administrator has given you access to employee self service options, you can sign in to add one or more dependents.

To add a dependent

1. On the **Employee Services** tab, click the **My Info** button.

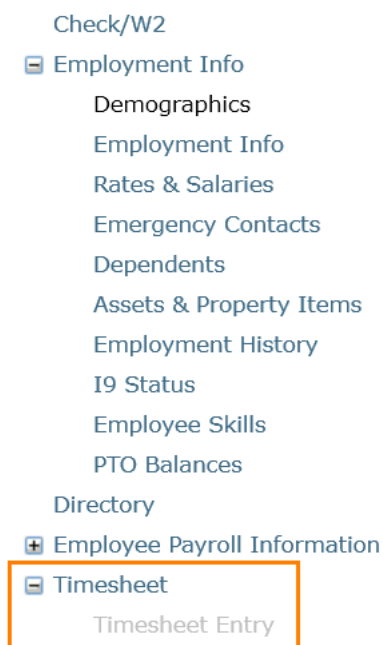2. In the menu on the left side of the screen, click **Dependents**. view

3. In the **Employee Dependents** area, click **Add New**.

4. Enter the information for your dependent.

5. Click **Save**.

Entering your time

If you administrator has given you access to employee self service options and assigned a timesheet to you, you can log in and enter your time.

To enter your time

1. On the **Employee Services** tab, click the **My Info** button.

2. In the menu on the left side of the screen, click **Timesheet** and then **Timesheet Entry**. view

> Check/W2
> ⊟ Employment Info
>   Demographics
>   Employment Info
>   Rates & Salaries
>   Emergency Contacts
>   Dependents
>   Assets & Property Items
>   Employment History
>   I9 Status
>   Employee Skills
>   PTO Balances
> Directory
> ⊞ Employee Payroll Information
> ⊟ Timesheet
>   Timesheet Entry

3. In the **Open Timesheets** section:

   - To add a new timesheet, click **Add New**. A timesheet is created for the next pay period, and the period-start, period-end, and due dates are automatically filled in based on your company settings.

     If you click Add New a second time, another timesheet for the following pay period is created.

   - To edit an existing open timesheet, click anywhere in its row to open it.

4. Enter your time:

- Enter your hours in the **Regular Hours** and **O/Time Hours** fields.
- If you need to add time in multiple increments for one day, in the row for that day, click **Add Line**.

5. After entering your time:

- Click **Save For Later** if you plan to edit the timesheet again before you submit it.
- Click **Submit For Approval** if you are finished entering time for this timesheet.

> **Note:** When you submit your timesheet, its status changes from Open to Closed. You can view a closed timesheet, but you can not make changes to it.