ADVANTAGE 3.10

EMPLOYEE SELF SERVICE (ESS)
USER GUIDE

HUMAN RESOURCES AND PAYROLL
DEPARTMENTS
<table>
<thead>
<tr>
<th>Effective Date: 3/01/2018</th>
<th><strong>Contact:</strong> Human Resources – HRIS and Payroll</th>
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</thead>
<tbody>
<tr>
<td><strong>Revision Date:</strong></td>
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</tr>
<tr>
<td><strong>Change Implication:</strong></td>
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<td></td>
<td>Operational – change to the use of a system</td>
</tr>
<tr>
<td></td>
<td>Medium impact – moderate level of communications</td>
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<td></td>
<td>required, and some partner support</td>
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<td><strong>Audience:</strong></td>
<td>County Employees</td>
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<td><strong>Supporting Resources:</strong></td>
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Orientation
In the spring of 2018, the County of Monterey completed an upgrade of CGI Advantage from version 3.7 to 3.10 for HRM and Payroll.

This user guide covers the methods for performing Employee Self Service (ESS) functions in Advantage 3.10.

This document includes new functionalities available in Advantage 3.10.

Learning Objectives

After this lesson, employees will be able to:

- Customize the Home Page
- Modify Address information
- Set Up and Modify Emergency Contact information
- Manage Employee Name Changes
- Timesheet Management
- Process Leave Requests
- Set-up a primary and secondary accounts for direct deposit
- View Paystubs or Direct Deposit Advice
- View Tax Levies and Garnishments
- Create and view a W-4
- View Electronic W-2

Expectations

<table>
<thead>
<tr>
<th>Estimated Learning Time</th>
<th>2 hours</th>
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<tbody>
<tr>
<td>Experienced Staff</td>
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<table>
<thead>
<tr>
<th>Estimated Learning Time</th>
<th>4 hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Staff</td>
<td></td>
</tr>
</tbody>
</table>
Key Concepts and Terms

The following are integral to performing your job functions with this ADVANTAGE feature.

<table>
<thead>
<tr>
<th>Concept or Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Deposit</td>
<td>▪ Direct deposit process requires employee to provide data such as primary, secondary bank account number, frequency of deposit, bank routing number, bank name, deposit amount, percentage.</td>
</tr>
<tr>
<td>Tab</td>
<td>▪ The ESS allows employees to access data pertaining to Time and Leave, Compensation, and Benefits.</td>
</tr>
<tr>
<td>Sub Tabs</td>
<td>▪ The ESS application contains sub tabs to organize business functions into more specific categories. For example, the Time and Leave tab contains the Time Information, Timesheets, and Work Schedule sub tabs.</td>
</tr>
<tr>
<td>Widget</td>
<td>▪ Self-contained areas within each tab or sub tab. They allow employees to access data pertaining to specific information. For example, the Direct Deposit widget is under the compensation tab.</td>
</tr>
</tbody>
</table>
Logging into the Employee Self Service (ESS)

1. Access ESS using one of the following methods:
   A. From home, type the following URL into the address bar in Internet Explorer: https://employeecenter.co.monterey.ca.us/webapp/ESSPROD/ESS
   B. At work, click the Employee Self Service (ESS) link on the County’s intranet site: http://www.in.co.monterey.ca.us/

2. Enter your county-issued username and password at the ESS login screen.
   **Hint #1**: Be sure to enter your username in all lowercase letters!

3. Upon logging in, you will see your Home page.
Customizing Your Home Page

These step-by-step instructions explain the use of Employee Self Service (ESS) to customize your Home page.

A. The Home page now has all employee’s personal information in one location with specific links to key documents and informational pop-ups.

B. Notifications are now available on the Home page for review.

C. Quick Links to other areas of the ESS application are conveniently listed.
D. **My Work** are the documents that an employee has in progress or those that have already been completed.

![My Work screenshot](image)

E. All form and links to websites are now listed under **Forms and Websites** for quick reference.

![Forms and Websites screenshot](image)

F. The **Favorites** link is for employee’s to establish their favorite widgets (links and websites) that they personally use often. Click **Add/Modify Favorites** to view all widgets on a new window.

![Favorites screenshot](image)
G. In the **Favorites** widget, employee can add or delete widgets following the given instructions.

- To add a widget to your list of Favorites select the **Add/Modify Favorites** link.
- When the Favorites pop up window opens, simply click the star icon for the widgets you wish to designate as Favorites.
- The star icon will turn to a trashcan icon.
- To remove an item from your favorites, click the trashcan icon.

H. Click the **Save Favorites** button when you have finished making changes to view the applicable changes.
Interaction #1: To Create or Modify Home or Mailing Address

Description: For an employee to create or modify their Home or Mailing Address

1. Navigate to the Home tab.
2. Within the Welcome! widget, click Update Address.
3. Update Address window will appear.
4. Select the **Enter Home Address** section, located on the top menu, and modify the appropriate information:
   A. Street 1
   B. City
   C. Zip/Postal Code

5. If applicable, use the pick list arrow for the following:
   A. State/Province
   B. Country
   C. County

6. If the home address is the same, click the **Same Mailing Address** checkbox.
7. If the mailing address is different, navigate to and click Enter Mailing Address section.

8. Modify the appropriate information:
   A. Street 1
   B. City
   C. Zip/ Postal Code

9. If applicable, use the pick list arrow for the following:
   A. State/Province
   B. Country
   C. County

10. Review/confirm all information and click Submit. An automatic confirmation notification will appear.
11. Employee can view the status of their document by navigating to and clicking the **Home** tab and locating the ESS Employee Address document in their **My Work** widget.
Emergency Contact

Interaction #1: To Insert an Emergency Contact

**Description:** For an employee to set up an Emergency Contact in ESS

1. Under the **Home** tab, select **Update Emergency Contact**.

2. The **Update Emergency Contact** window will appear.
3. Under the **Enter Address Information** section, input demographic information:
   A. Contact First Name
   B. Contact Last Name
   C. Street 1
   D. City
   E. State/Province
   F. Zip/Postal Code
   G. Country (i.e. US = USA)
4. If applicable, input the following information:
   A. Contact Name Prefix
   B. Contact Name Suffix
   C. Contact Description
   D. Relationships
   E. If primary contact, click the Primary Contact checkbox
   F. If emergency contact is a spouse that works for the County, check the box next to Spouse works for same employer? and use the drop-down arrow under Spouse ID to locate the employee by name or employee number.
5. Use the scroll bar to navigate to the bottom of the page
6. Under the **Enter Phone and E-mail Information** section, input the following information:
   A. **Phone**
   B. Under **Type**, use the pick list to select the appropriate phone type
   C. Select **Primary Phone** next to the phone number that should be used as the primary contact method.
   D. **E-mail**
   E. **Confirm E-mail**
   F. Select **Primary E-mail** next to the e-mail that should be used as the primary contact method.
7. To add a second Emergency Contact, click **Add Emergency Contact**. Under **Enter Address Information** and **Enter Phone and E-mail Information** sections, repeat steps 3-6.

8. Review all the information and click **Submit**.

10. The employee can view the status of their document by clicking on the **Home** tab and locating the MYEMER document in their **Welcome!** widget.
Interaction #2: Modify Emergency Information

**Description:** Once an employee’s Primary or Secondary Emergency Contact has been established, the employee can modify information.

1. Under the **Home** tab, select **Update Emergency Contact**.

2. The **Update Emergency Contact** window will appear.

3. To delete a contact information, click on the the TRASH CAN icon under **Copy Line** next to the emergency contact’s name.
4. To modify the Emergency Contact Information, select the emergency contact, and repeat steps 3-6 of *Interactions #1: To Insert an Emergency Contact.*

5. An automatic confirmation message will appear
6. The employee can view the status of their document by clicking on the **Home** tab and locating the MYEMER document in their **Welcome!** widget.
Employee Name Change

Interaction #1: To Update Name

Description: For an employee to update their name in the system.

1. On the Home tab, navigate to the Welcome! widget and select Process Name Change.

2. The Process Name Change widget will appear.

3. Use the pick list arrow for Name Change Reason to select the appropriate option.
4. If applicable, use the pick list arrow for New Prefix and New Suffix to select the appropriate option.

5. Insert the applicable information:
   A. New First Name (if no changes are needed, insert current first name)
   B. New Middle Name
   C. New Last Name (if no changes are needed, insert current last name)

6. To add an attachment, click Browse next to Add Attachment to upload a PDF copy of appropriate documentation to support the change; i.e. new Social Security card, marriage certificate, etc. (Name should match the Social Security card)

7. Review/confirm all information and click Submit.
8. Message will appear on the **Welcome!** widget stating that the document is pending approval

![Welcome! widget](image-url)
Timesheet Submittal for a Positive Paid Employee

- Deadlines for submitting timesheets vary by department. Your timekeeper can inform you of these deadlines.
- All employees are responsible for submitting an accurate timesheet that adheres to:
  - Their bargaining unit’s Memorandum of Understanding (MOU).
  - The Payroll Time and Leave Report Policy.
- Employees should submit timesheets in advance before leaving on vacation or other approved time away from the office.
- Upon submission, a timesheet will electronically workflow to the employee's supervisor for approval or rejection due to errors. If rejected, the employee is responsible for correcting the timesheet and resubmitting it before his/her department’s timesheet deadline.
- Supervisors are responsible for reviewing the accuracy of employees’ timesheets and approving them before his/her department’s deadline.
- Supervisors who will not be available to approve timesheets are responsible for informing their timekeeper. Timekeepers will reroute the impacted timesheets to a back-up supervisor.
- Adjustments made after a timesheet is approved are submitted by department timekeepers. The timesheet adjustment (TADJ) workflows to the employee’s supervisor then to the Auditor-Controller’s Office for approval.
- Each department has a process to accommodate situations when employees are not available to submit their timesheets. It is important for you to understand and adhere to this process.
Interaction #1: Timesheet Submittal for an Hourly Employee

**Description:** For an Hourly Employee to complete a timesheet

1. Click the **Time and Leave** link.

2. Click the **Timesheets** sub-tab.

3. Click **Create New Timesheet**.
4. A new window displaying pay periods will appear:
   A. Select the appropriate pay period.
   B. Click Create Timesheet..

5. New Features:
   A. Your timesheet for the entire pay period is on one page.
   B. The Insert Row, Easy Fill, Leave Balance and Printer Friendly Version links are in a new location.
   C. There are new features and options when completing your timesheet:
      Discard, Save, Save and Close and Submit.
   D. Document Comments is now available.
   E. There is a link for employees to upload Attachments.
   F. Notice the new location for the Clock.
6. Click on the Event Pick List to choose an Event Type.

7. Choose “HRPAY” as the Event Type.
8. At the **Timesheet** details page, either click the **Easy Fill** button to populate your timesheet with your scheduled work hours and any holiday hours that occurred during the pay period or manually fill in the hours you worked for the pay period. (Holiday hours, if any, will be highlighted in blue.).
Interaction #2: Entering Leave

**Description:** For entering time away from the office.

You have now accessed your timesheet and populated it. Now, proceed to enter leave time taken during the pay period, such as sick or vacation. If you did not take any leave time during this pay period, refer to *Interaction #7 on Page 40.*

1. Click **Insert Row** to enter in leave time.
2. Click on the picklist to select the leave event associated with the leave time for this pay period.

**Hint #1:** If you are unsure of your current leave balances, click the **Leave Balance** button in the upper-right corner of the Timesheet Details page.

3. Type part of the leave event into the **Short Description** field, encapsulated in asterisks then click **Search** (e.g., "ANNUAL"), or
4. Click the **Next** button repeatedly until you locate the leave event type.
5. Click **Select** to populate the intended leave type.

**Hint #2:** To assist your search efforts, use asterisks (*) as wildcard characters.

**Hint #3:** To see a list of the most frequently used leave events, enter U* in the **Short Description** field then click **Browse**.
6. At the Timesheet Details page, enter the number of leave hours in the respective date column for the leave type then delete those hours from the same day’s HRPAY time row.

*Note:* The example below illustrates an hourly employee who used 8:00 hours Annual Leave on Monday and Tuesday during week 1 of the pay period.

7. Repeat steps 1 through 6 for any additional leave types you need to enter for this pay period.
Interaction #3: Using Pay Override Codes on a Timesheet

**Description:** For an employee to use override codes

Some departments will ask employees to “charge” hours to certain projects, programs, grants, etc. This is done by override codes on the timesheet for the hours that need to be charged.

- In ESS, an employee will only see the override codes that he/she is permitted to use. Each code will have a brief description to help identify it.
- A new “time row” must be inserted for each override code used on a timesheet.

1. Click **Insert Row** for each override code used on a timesheet.
2. Click on **Event** and Select the appropriate **Event**.
3. Click on the **Accounting Override Picklist** and a browser page will appear. Select the appropriate override code.

**Note:** The example below illustrates an employee charging time to a single override code (310C). The hours associated with this override code will be charged to its preset internal accounting structure. The remaining hours not associated with the override code will be charged to the employee’s regular department and unit.
Interaction #4: Entering Overtime on Your Timesheet

**Description:** Entering overtime on a timesheet for an Hourly Employee

Entering overtime in your timesheet is done at the Timesheet Details page. There are two ways to enter overtime: A) use the HRCMP event if you want your overtime hours credited to your compensatory time bank, or B) use the HRPAY event if you want your overtime hours paid out.

1. Click **Insert Row** to enter the overtime hours.
2. Click on the picklist to choose the **Event** type for how you will enter your hours worked.

**Note:** The example below illustrates an employee entering overtime on Saturday of week. This will result in the employee being paid at an overtime rate in excess of an employee’s work period.
Interaction #5: Entering Shift Differentials on the Timesheet

Some employees are entitled to shift differentials depending on actual time hours worked per their MOU. These employees will use the **Time In/Time Out** feature of the timesheet.

1. Click **Insert Row** to enter Shift Differentials on the timesheet.
2. Click the picklist to choose the appropriate **Event** type (should be NTPAY or NTCMP).

3. Click the **Clock** icon for Hours Entry window to appear.
4. Enter the hours using Military Time.

**Note:** If leave is taken during the week, a new “time row” must be added to the timesheet for the appropriate leave event (e.g., vacation, sick).
Interaction #7: Copy a Timesheet

Description: For an employee to copy a previous timesheet

1. Select **Time and Leave** on the Home Page.
2. To copy a previous timesheet, select any previous using the radio buttons in the grid by clicking on the radio button under Select.

3. Click Copy Previous Timesheet.

4. To browse for archived timesheets, use the navigation arrow on the right side to find the appropriate timesheet.

5. Select the pay period for which you would like to create a timesheet and click Create Timesheet button.
6. Copied timesheets are populated with the Event and Override Codes from the timesheet which was copied.

**Note:** No hours (leave or pay) are copied forward.
Interaction #8: Modify a Timesheet

**Description:** For an employee to modify an incomplete timesheet

7. To modify a saved timesheet, select the applicable timesheet by clicking on the radio button under **Select**.

8. Click **Modify In Progress Timesheets**.

9. The timesheet will be opened, allowing you to make the necessary changes. Only timesheets that have not yet been submitted, or ones that have been submitted but were rejected, can be modified.

10. To browse for archived timesheets, use the navigation arrow on the right side to find the appropriate timesheet.
Interaction #7: Submit a Timesheet

**Description:** For an employee to submit a Timesheet

1. To Submit a timesheet, click **Submit**. A timesheet box will appear to certify the accuracy of the timesheet.
2. Insert comments as applicable in the **Comments** field.
3. Click **Submit**. You will then receive a pop up message that allows you to enter any comments or finalize the submission process.
4. The system will validate your timesheet and display error messages or a message indicating its successful submission.

5. Your timesheet will workflow to your supervisor then to your department timekeeper for approval.

6. The status of your timesheet is available on the Home tab, under My Work widget.

Timesheet Details Buttons

- **Discard** – Discards all changes and returns you to the timesheet roster. All changes will be lost as the draft timesheet will be deleted. You will need to create a new timesheet for the pay period
- **Save** – Saves the data and allows you to continue working on the timesheet
- **Save and Close** – Saves your changes, closes the timesheet and returns you to the Timesheet roster. You can return to this timesheet at a later date to continue with your changes
- **Submit** – Sends the timesheet for approval. Once submitted, the timesheet cannot be modified unless it is rejected.
Timesheet Submittal for an Exception Paid Employee

Interaction #1: Timesheet Submittal for an Exception Employee

**Description:** For an exempt employee to complete a timesheet

*Note:* Exempt employees who work less than 1.0 FTE must enter their hours in the same manner as a positive-pay employee. *(See Page #27)*

- Timesheets for exempt employees are exception-based. This means an exempt employee only enters the exceptions to his/her regular schedule into his/her timesheet (i.e., holiday time and leave time).
- Upon submission, a timesheet will electronically workflow to the employee’s supervisor for approval or rejection due to errors. If rejected, the employee is responsible for correcting the timesheet and resubmitting it before his/her department’s timesheet deadline.

1. Navigate to and click the **Time and Leave** tab.

![CGI Advantage ess interface](image)
2. Click the **Timesheets** sub-tab.

3. Click the **Create New Timesheet** button.

4. A new screen displaying pay period:

   A. Select the appropriate pay period.
   B. Click **Create Timesheet**.
5. New Features:
   
   A. Your timesheet for the entire pay period is on one page.
   B. The Insert Row, Easy Fill, Leave Balance, and Printer Friendly Version links are in a new location.
   C. There are new features and options when completing your timesheet: Discard, Save, Save and Close and Submit.
   D. Document Comments is now available.
   E. Employee can now attach documents under Attachment.
   F. Notice the new location for the Clock.

6. At the Timesheet Details page, click the Easy Fill button to populate your timesheet with any holiday time that occurred during the pay period.
7. Proceed with one of the following:
   A. Click **Save** and **Submit** if the timesheet is complete
   B. Click **Save and Close** if the timesheet is not ready for submission
   C. Click **Discard** to trash the timesheet and start over.
Interaction #2: Entering Leave

**Description:** For entering time away from the office.

Enter leave time taken during the pay period, such as Annual Leave.

1. Click **Insert Row** to enter leave time.
2. Click on the picklist to select the leave event associated with the leave time for this pay period.

**Hint #1:** If you are unsure of your current leave balances, click the **Leave Balance** button in the upper-right corner of the Timesheet Details page.

3. Type part of the leave event into the **Short Description** field, encapsulated in asterisks then click **Browse** (e.g., *ANNUAL*).
4. Click the **Next** button repeatedly until you locate the leave event type.
5. Click **Select** to populate the intended leave type.

**Hint #2:** To assist your search efforts, use asterisks (*) as wildcard characters.

**Hint #3:** To see a list of the most frequently used leave events, enter U* in the **Short Description** field then click **Browse**.
Interaction #3: Using Accounting Override Codes on a Timesheet

**Description:** For an employee to use override codes
Some departments will ask employees to “charge” hours to certain projects, programs, grants, etc. This is done by override codes on the timesheet for the hours that need to be charged.

- In ESS, an employee will only see the override codes that he/she is permitted to use. Each code will have a brief description to help identify it.
- A new “time row” must be inserted for each override code used on a timesheet.

1. Click on the **Picklist** and a page will appear.
2. Under **Override Code**, enter the appropriate code.

**Note:** The example below illustrates an employee charging time to a single override code (*310NC*). The hours associated with this override code will be charged to its preset, internal accounting structure. The remaining hours not associated with the override code will be charged to the employee’s regular department and unit.
Interaction #4: Modify a Timesheet

Description: For an employee to modify an incomplete timesheet

1. To modify a saved timesheet, select the applicable timesheet by clicking on the radio button under Select.

2. Click Modify In Progress Timesheets.

3. To browse for archived timesheets, use the navigation arrow on the right side to find the appropriate timesheet.
Interaction #5: Submit a Timesheet

**Description:** For an employee to submit a Timesheet

1. To Submit a timesheet, click **Submit**. A timesheet box will appear to certify the accuracy of the timesheet.

2. Insert comments as applicable in the **Comments** field.

3. Click **Submit**.
4. The system will validate your timesheet and display error messages or a message indicating its successful submission.

5. Your timesheet will workflow to your supervisor then to your department timekeeper for approval.

6. The status of your timesheet is available on the Home tab, under My Work widget.
Leave Request

Interaction #1: To Request Leave

**Description:** For an employee to request leave

1. Navigate to and select **Time and Leave** tab, located on the top navigation menu.

2. Within the **Leave Requests and Usage** widget, click the **Create Leave Request** button.

3. The **Leave Request** window will appear.

4. Use the pick list arrow **Leave Type** to select the applicable option.
5. To request a partial day leave, click the **Partial Day** checkbox.
   
   A. Additional fields will appear.

6. Insert the following:
   
   A. **Start Date**
   
   B. **Start Time** and **End Time**
   
   C. Under **Comments**, insert comments pertaining this transaction.

7. To add additional partial day requests, click **Add Line** and repeat steps 4-6.
8. To request a full day leave, keep **Partial Day** checkbox unchecked.

9. Use the pick list arrow **Leave Type** to select the applicable option.

10. Insert the following:
    A. **Start Date**
    B. **End Date**
    C. **Amount** (In hours)
    D. Under **Comments**, insert comments pertaining to this transaction.
11. To add additional full day requests, click **Add Line** and repeat steps 8-10.

12. Click **Submit**.

13. Message window will appear stating that the document is pending approval.
14. Submitted leave requests will appear in **Leave Requests and Usage**, under the **Submitted Leave Requests** tab.

![Image of Leave Requests and Usage page]

<table>
<thead>
<tr>
<th>Leave Type</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
<th>Approver</th>
<th>View</th>
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<td>USE SICK #RS</td>
<td>10/19/2017</td>
<td>10/19/2017</td>
<td>Pending</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Direct Deposit

Interaction #1: Primary Direct Deposit Account

Description: To set up a Primary Account

1. Navigate to and select the Compensation tab, located on the top navigation menu.
2. Navigate to the Direct Deposit widget.
   
   A. Click the Start Direct Deposit Wizard button to setup the Primary Account (Checking or Savings).

   B. The Direct Deposit Wizard appear window will appear.

3. Navigate to Direct Deposit widget.

4. Select the account type by using the drop-down menu for Account Type.

5. Input the following fields:
C. 9 digit **ABA Routing Number**
D. **Account Number**
E. **Nickname**
F. Use drop-down menu for **Check/Paystub Routing**
6. Under Attachments, click Browse to upload a PDF copy of a cancelled check from a banking institution.

7. Review and click the Confirm Accounts button.
8. The **Direct Deposit Confirmation** window will appear.

9. Review/confirm all the information and click the **Submit** button.

   **Note:** Notification is sent to AC Payroll for approval of the Net Pay Distribution Document.

10. Employee can view the status of their document by clicking on the **Home** tab and locating the Net Pay Distribution document in their **My Work** widget.
Interaction #2: Secondary Direct Deposit Account

**Description:** Once an employee’s Primary Account has been established, the employee can set up to 9 Secondary Accounts.

1. Repeat Steps 1 & 2 of *Interaction #1*.
2. Navigate to and select the **Add Accounts** button.
3. Select the account type by using the drop-down menu for **Account Type**.
4. Input the following fields:
   A. 9 digit **ABA Routing Number**
   B. **Account Number**
   C. **Nickname**

5. Use the drop-down menu for both **Priority Order** and **Check/Paystub Routing**.

6. Select the **Deduction Frequency** from the pick list, and insert the **Distribution Percent** or the **Distribution Amount**.

7. Under **Attachments**, click **Browse** to upload a PDF copy of a cancelled check from the banking institution.

   **Note:** If additional accounts need to be created, click **Add Accounts** and repeat steps 3-7.

8. If no additional accounts are needed, select **Confirm Accounts** and the **Direct Deposit Confirmation** window will appear.
9. Review/ confirm all information and click **Submit**.

*Note: Notification is sent to AC Payroll for approval of the Net Pay Distribution Document.*

10. Employee can view the status of their document by clicking on the **Home** tab and locating the Net Pay Distribution document in their **My Work** widget.
Interaction #3: Modify Account Information

**Description:** Once an employee’s Primary or Secondary Account has been established, the employee can modify Accounts.

1. Navigate to and select the **Compensation** tab, located on the top navigation menu.
2. Navigate to the **Direct Deposit** widget.
   
   A. Click the **Start Direct Deposit Wizard** button to setup the Primary Account (Checking or Savings).
   
   B. The **Direct Deposit Wizard** appear window will appear.

![Direct Deposit Wizard Image](image-url)
3. Make the necessary modifications. Review and click Confirm Accounts.
4. Direct Deposit Confirmation window will appear.
5. Review/confirm all the information and click **Submit**.
   
   *Note: Notification is sent to AC Payroll for approval of the Net Pay Distribution Document.*

6. Employee can view the status of their document by clicking on the **Home** tab and locating the Net Pay Distribution document in their **My Work** widget.
Interaction #4: Cancelling Your Direct Deposit

**Description:** Once an employee’s Primary or Secondary Account has been established, the employee can cancel their Direct Deposit election.

You must first close all secondary accounts before closing your primary account.

**A. Closing Your Secondary Account**

1. Repeat Steps 1 & 2 of *Interaction #1* on Page

2. In the Direct Deposit Wizard, Click the **Next** button to access the secondary account that you wish to close.

3. Check the **Account Deleted** checkbox.

4. Click on **Confirm Accounts**.

---

**Secondary Account**

If you currently have a **SECONDARY** Direct Deposit Account the information is displayed below. If you would like to set up a **SECONDARY** Direct Deposit Account, complete the fields and attach a scanned copy of your check or the routing and account number supplied by your financial institution.

You can choose a percent of your net pay (for example: enter .20 for 20%) or a fixed dollar amount as well as how often you want the deposit to be made. You can have a deposit made every payday, once a month (first, second or third payday), twice a month or only if the month has three paydays. The Check/Paystub routing is a required field.

If you choose a fixed amount and there isn’t enough net pay to cover it, the **SECONDARY** Direct Deposit Account will be skipped. Remaining net pay balances always go to the PRIMARY Direct Deposit Account.

You may select up to 10 different **SECONDARY** Direct Deposit Account(s) if desired. You will need to determine the priority order. Click on the Add Account button to set up more **SECONDARY** Direct Deposit accounts.
5. At the Confirmations Screen, review all your information then click **Submit**.

6. Wait for the system to accept your request and generate your confirmation message.

7. Once submitted, your request will need to be approved by the Auditor-Controller’s Office. If you have a County-issued email account (Outlook), you will receive a confirmation email upon approval.

**B. Closing Your Primary Account**

Requests to close a primary account must be approved by the Auditor-Controller’s Office. Until approved, your net pay will continue to be deposited into your primary account. After your request is approved, you will begin to receive a paper check for your net pay.

1. In the **Direct Deposit Wizard** (Primary Account screen), set the account’s properties to:

<table>
<thead>
<tr>
<th>Field</th>
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<tbody>
<tr>
<td>Account Type</td>
<td>“Not Applicable”</td>
</tr>
<tr>
<td>ABA Routing Number</td>
<td>Delete (blank)</td>
</tr>
<tr>
<td>Account Number</td>
<td>Delete (blank)</td>
</tr>
<tr>
<td>Nickname</td>
<td>Delete (blank)</td>
</tr>
<tr>
<td>Check/Paystub Routing</td>
<td>“Check-stub to Pay Location”</td>
</tr>
</tbody>
</table>

![Direct Deposit Wizard](image)
2. Click the **Confirm Accounts** button.

3. At the confirmation screen, review all you information then Click **Submit**.

4. Wait for the system to accept your request and generate your confirmation message.

5. Once submitted, your request will need to be approved by the Auditor-Controller’s Office. If you have a County-issued email account (Outlook), you will receive a confirmation email upon approval.

6. Employee can view the status of their document by clicking on the **Home** tab and locating the Net Pay Distribution document in their **My Work** widget.
Pay Advice Notice

Interaction #1: To View Pay Stubs or Direct Deposit Advice.

Description: For an employee to view Pay Stubs or Direct Deposit Advices.

1. Select the Compensation tab, located on the top navigation menu.
2. Navigate to the Issued Checks/Advices widget.
3. To filter, enter the year of the check in the field next to Enter a Year and click Submit.
4. Under the **Download** column, click the paper/ paper clip icon on the applicable line to download the direct deposit advice/ paystub.

5. A prompt will appear and ask if the employee wants to **Open** or **Save** the document. Click **Open** or **Save**.

6. The direct deposit advice/ paystub will open for the employee can review and/or print.
Pay and Deduction Details and Summary

1. To view Pay and Deduction Details and Summaries, navigate to and click on the Compensation tab.

2. On the Issued Checks/Advices widget, enter a specified year under Enter a Year field.

3. Select a check date and click View Pay and Deduction Details to view the pay and deduction summary.
4. The **Pay and Deduction Details** window will appear, where you'll be able to view the following:

   A. Deduction Details
   B. Fringe Details.
Tax Levies and Garnishments

1. To view applicable Tax Levies and Garnishments, navigate to and click on the Compensation tab.
2. All Tax Levies and Garnishments will appear.

3. The Pay and Deduction Details window will appear with the following information for pay, deduction, and fringe details. The user can view their information by clicking on the respective tabs.
Form W-4 Allowance

Interaction #1: To create Form W-4 Employee’s Withholding Allowance Certificate

Description: For an employee to create a W-4 in the system.

1. Navigate to and select the Compensation tab, located on the top navigation menu.
2. Navigate to the Tax Information widget.
3. Click Create Federal W4.

5. Insert the following:
   A. Federal Tax Marital Status.
   B. Total number of allowances you are claiming.
   C. Additional amount, if any, you want withheld from each paycheck.

Please Note:

D. If eligible, use the dropdown to select **Exempt**.
E. If the employee wants to make changes to state withholdings, a **CA STATE TAX DE 4 FORM** must be completed and submitted.
F. If the employee’s last name under the W-4 differs from the social security card, click the checkbox under “**If your last name...**”
6. Review/confirm all information and click the checkbox under the "Under of Perjury Penalties..." statement for electronic signature.

7. Click Submit.

8. The document will workflow to Auditor Controller Payroll.

9. You can check the status of your document on the Home tab, under the My Work widget.
Interaction #2: To View W-4 Allowances

Description: For an employee to view and print W4 Allowances

1. Navigate to and select the Compensation tab, located on the top navigation menu.
2. Navigate to the Tax Information widget.
3. Click the View Tax Withholdings/Allowances button.
4. The Employee Tax Withholding/Allowances details will open up.
Electronic W-2

1. To view applicable W-2 documents, click on the Compensation Tab.

2. Follow the prompts to view the Electronic W-2 documents.
## Revision History

<table>
<thead>
<tr>
<th>Date</th>
<th>Editor</th>
<th>Revisions</th>
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<tbody>
<tr>
<td>3/01/2018</td>
<td>D. Wilson</td>
<td>• SAMPLE</td>
</tr>
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