Monterey County
ERP
Enterprise Resources Planning

ADVANTAGE 3.10

EMPLOYEE SELF SERVICE (ESS) USER GUIDE

HUMAN RESOURCES AND PAYROLL DEPARTMENTS

Course No. EMPLOYEE SELF SERVICE (ESS) USER GUIDE

Effective Date: 3/01/2018	**Contact:** Human Resources – HRIS and Payroll
Revision Date:	Document Status: FINAL
Change Implication:	System ✓ Operation ✓ Organization ✓ Operational – change to the use of a system Medium impact – moderate level of communications required, and some partner support
Audience:	County Employees
Supporting Resources:	

Table of Contents

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

Estimated Learning Time : Experienced Staff	2 hours
Estimated Learning Time : New Staff	4 hours

Key Concepts and Terms

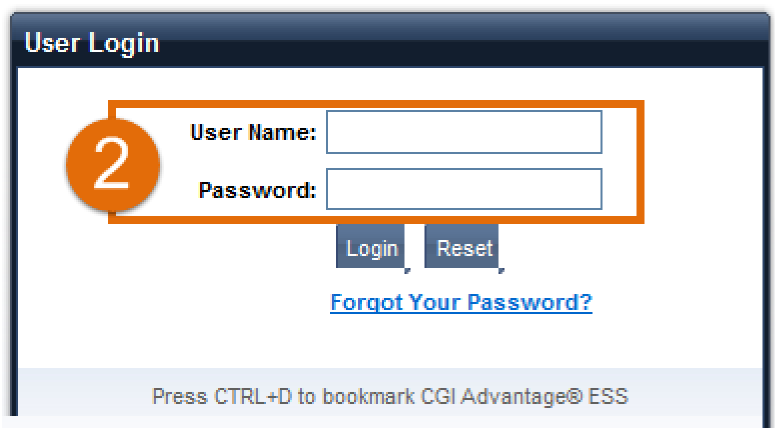
The following are integral to performing your job functions with this ADVANTAGE feature.

Concept or Term	Description
Direct Deposit	▪ 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.
Tab	▪ The ESS allows employees to access data pertaining to **Time and Leave**, **Compensation**, and **Benefits**.
Sub Tabs	▪ 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.
Widget	▪ 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.

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.

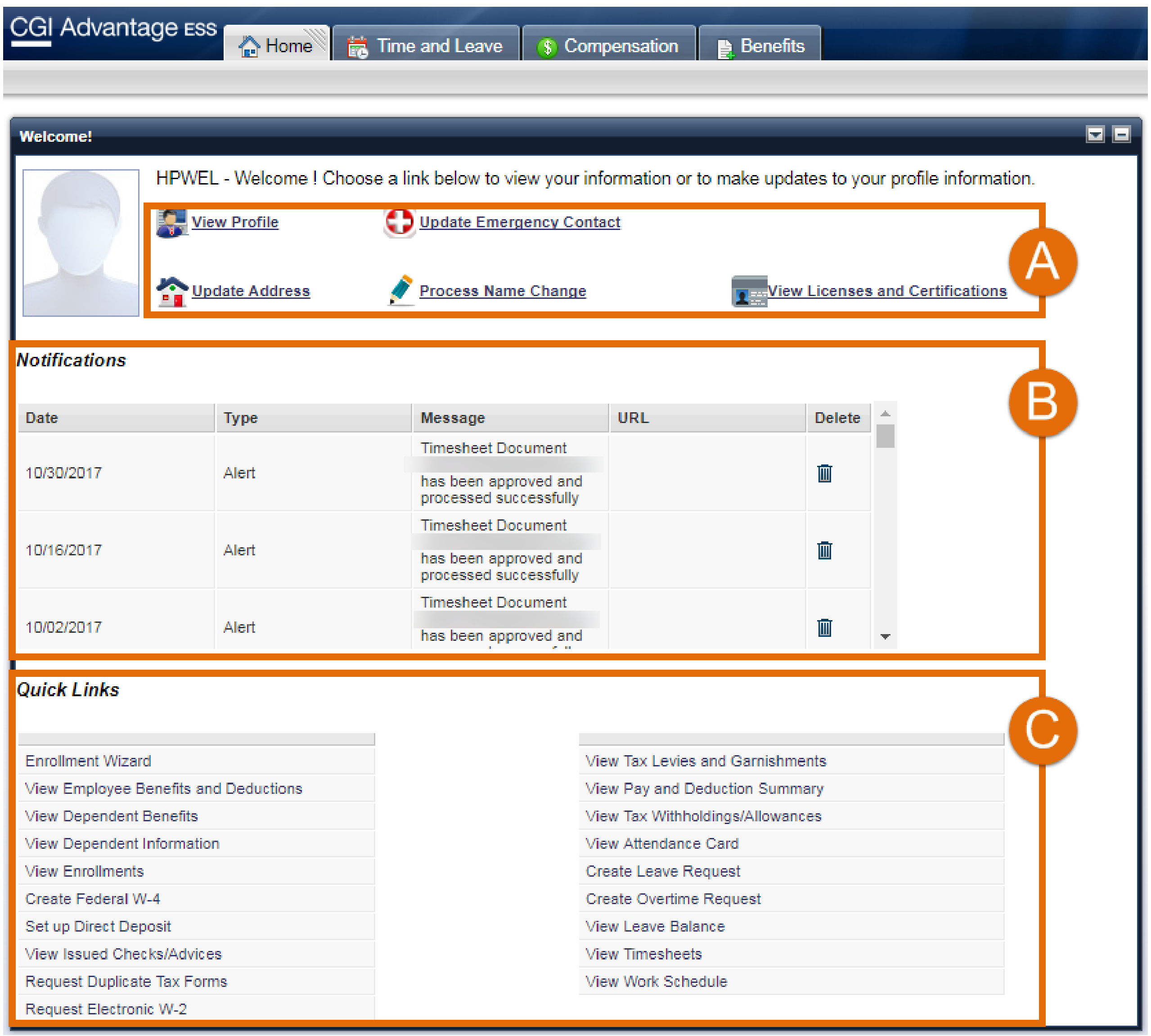
Customizing Your Home Page

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

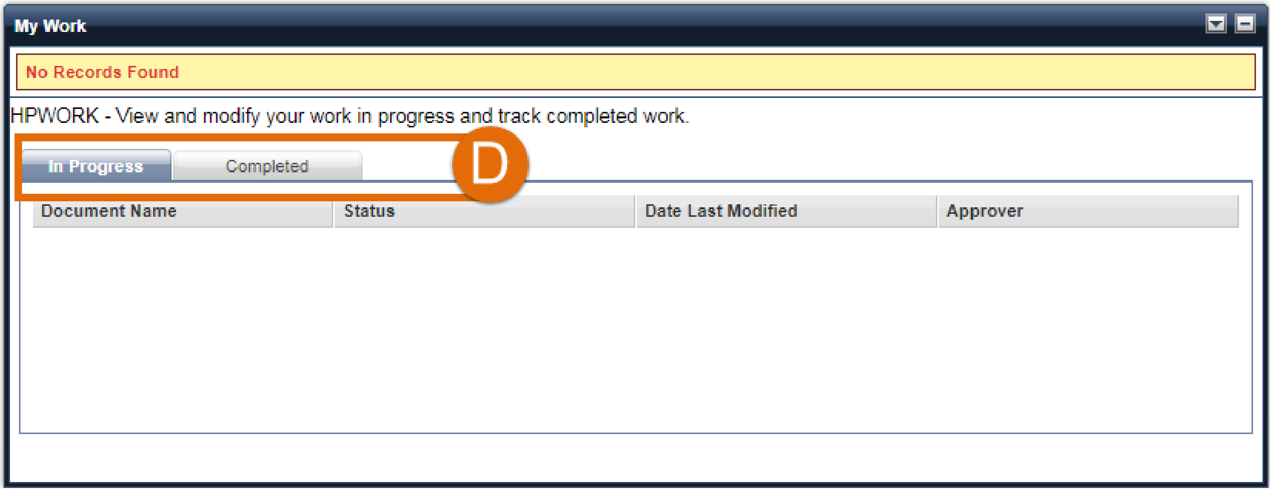
A. The **Home** page now has all employee's personal information in one location with specific links to key documents and informational pop-ups.

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

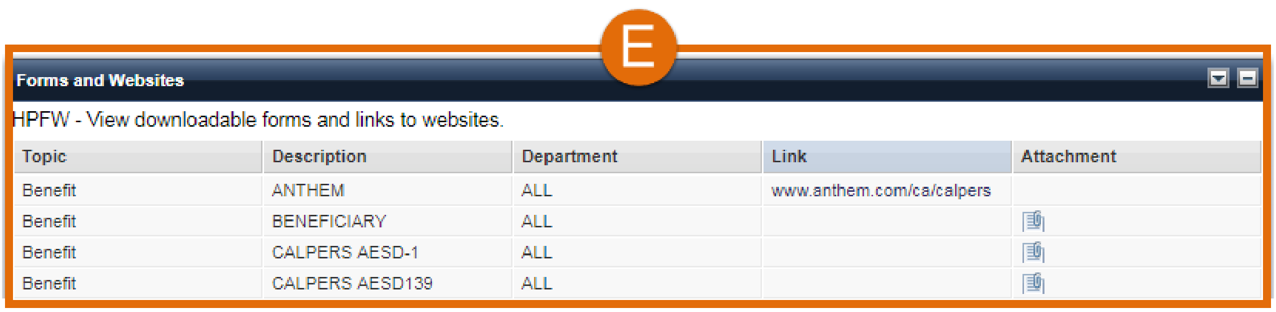
C. **Quick Links** to other areas of the ESS application are conveniently listed.



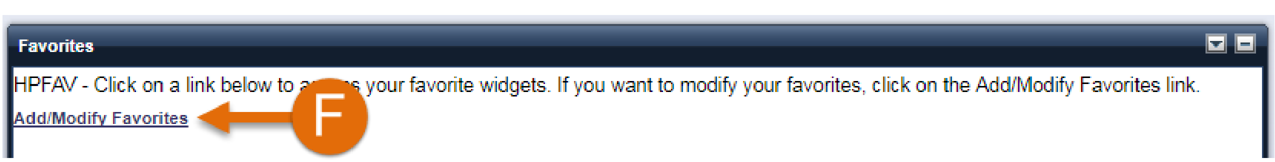
D. **My Work** are the documents that an employee has in progress or those that have already been completed.



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



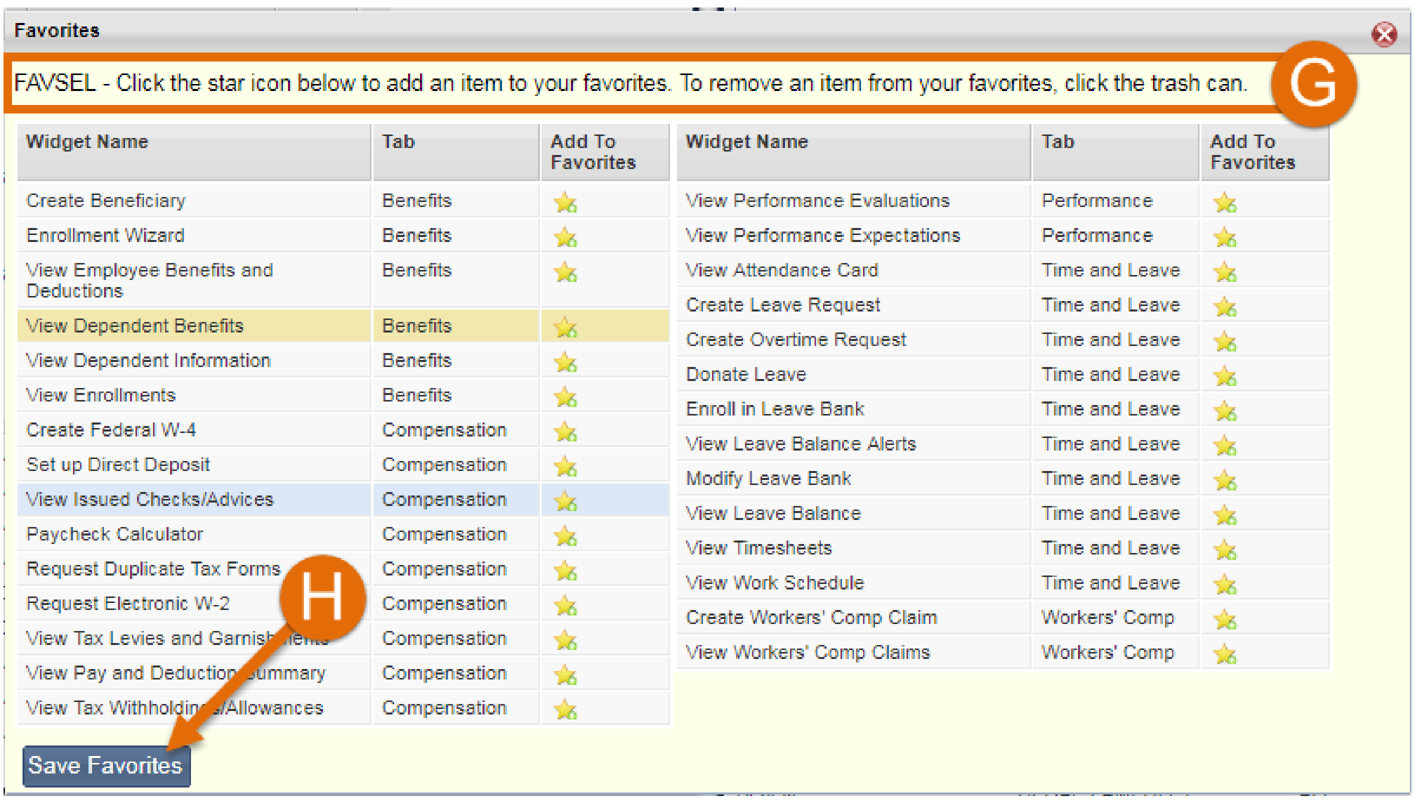
F. The **Favorites** link is for employee's to establish their favorite widgets (links and websites) that they personally use often. Click **Add/ Modify Favorites** to view all widgets on a new window.



G. In the **Favorites** widget, employee can add or delete widgets following the given instructions.

- To add a widget to your list of Favorites slect 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.


Favorites

FAVSEL - Click the star icon below to add an item to your favorites. To remove an item from your favorites, click the trash can.

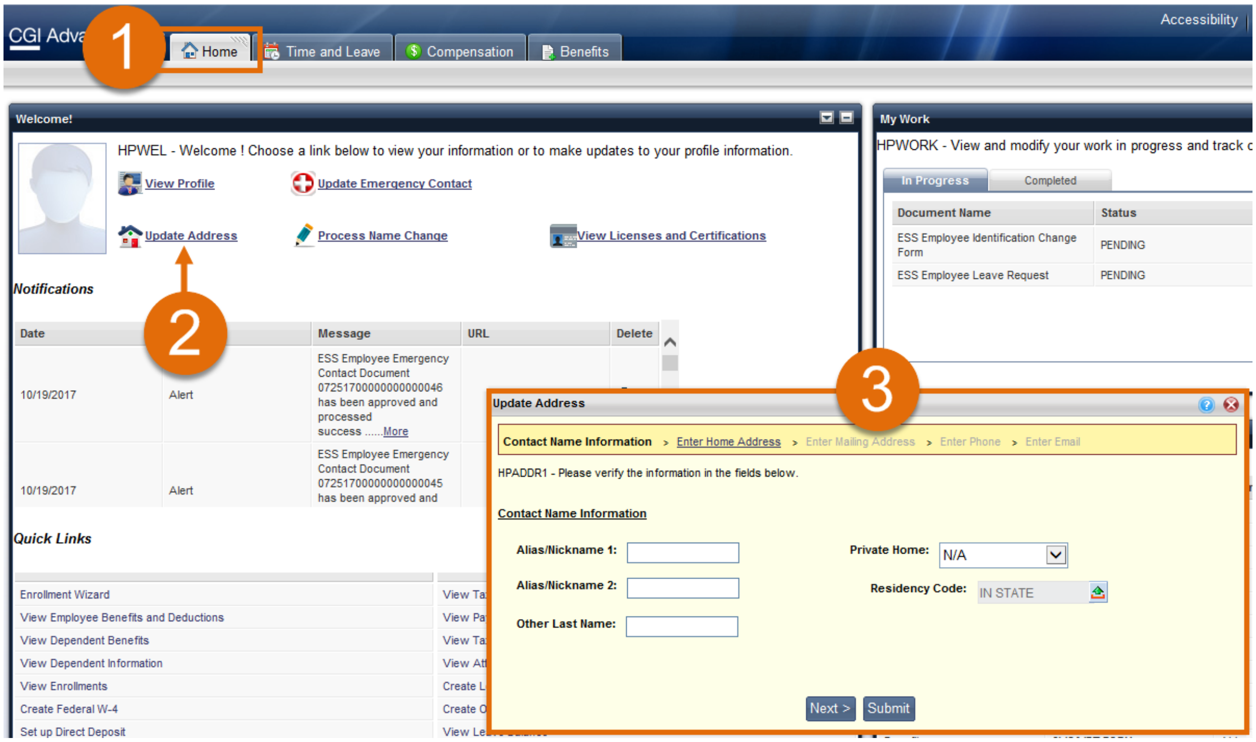
Widget Name	Tab	Add To Favorites
Create Beneficiary	Benefits	
Enrollment Wizard	Benefits	
View Employee Benefits and Deductions	Benefits	
View Dependent Benefits	Benefits	
View Dependent Information	Benefits	
View Enrollments	Benefits	
Create Federal W-4	Compensation	
Set up Direct Deposit	Compensation	
View Issued Checks/Advices	Compensation	
Paycheck Calculator	Compensation	
Request Duplicate Tax Forms	Compensation	
Request Electronic W-2	Compensation	
View Tax Levies and Garnishments	Compensation	
View Pay and Deduction Summary	Compensation	
View Tax Withholdings/Allowances	Compensation	
View Performance Evaluations	Performance	
View Performance Expectations	Performance	
View Attendance Card	Time and Leave	
Create Leave Request	Time and Leave	
Create Overtime Request	Time and Leave	
Donate Leave	Time and Leave	
Enroll in Leave Bank	Time and Leave	
View Leave Balance Alerts	Time and Leave	
Modify Leave Bank	Time and Leave	
View Leave Balance	Time and Leave	
View Timesheets	Time and Leave	
View Work Schedule	Time and Leave	
Create Workers' Comp Claim	Workers' Comp	
View Workers' Comp Claims	Workers' Comp	

Save Favorites

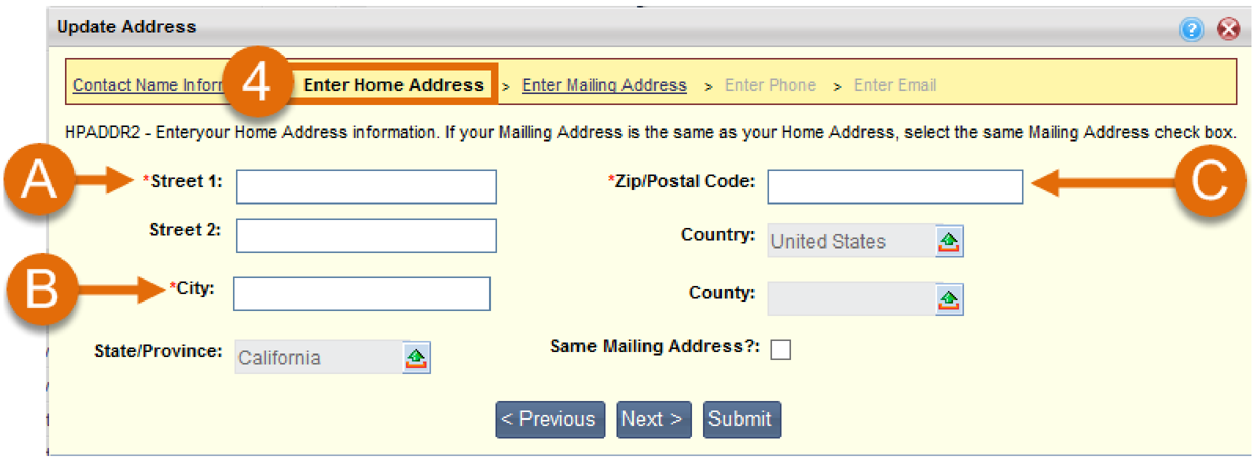
Interaction #1: To Create or Modify Home or Mailing Address

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 Addresss** window will appear.

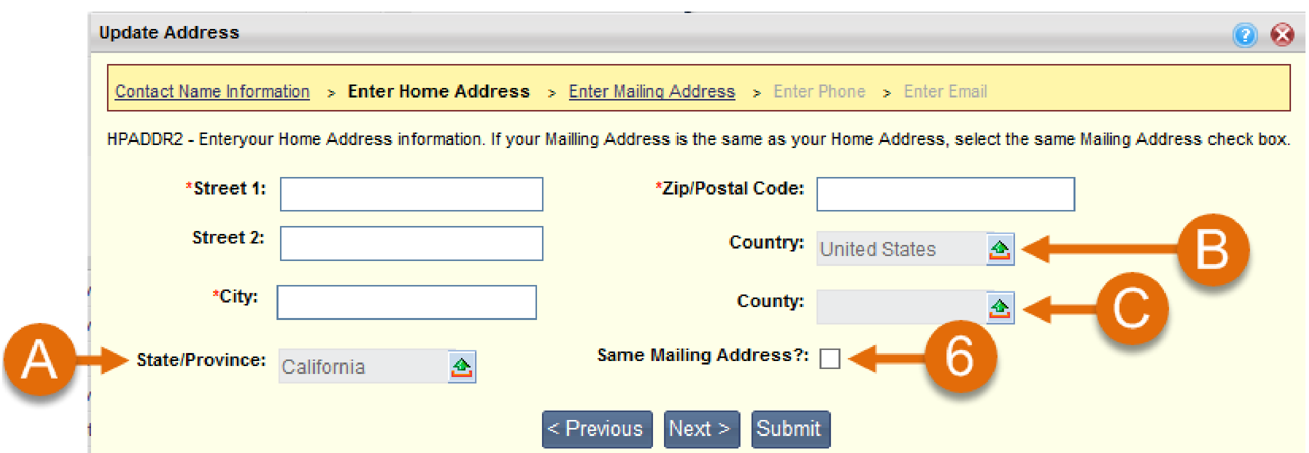


4. Select the **Enter Home Address** section, located on the top menu, and modify the appropriate information:
    A. **Street 1**
    B. **City**
    C. **Zip/Postal Code**



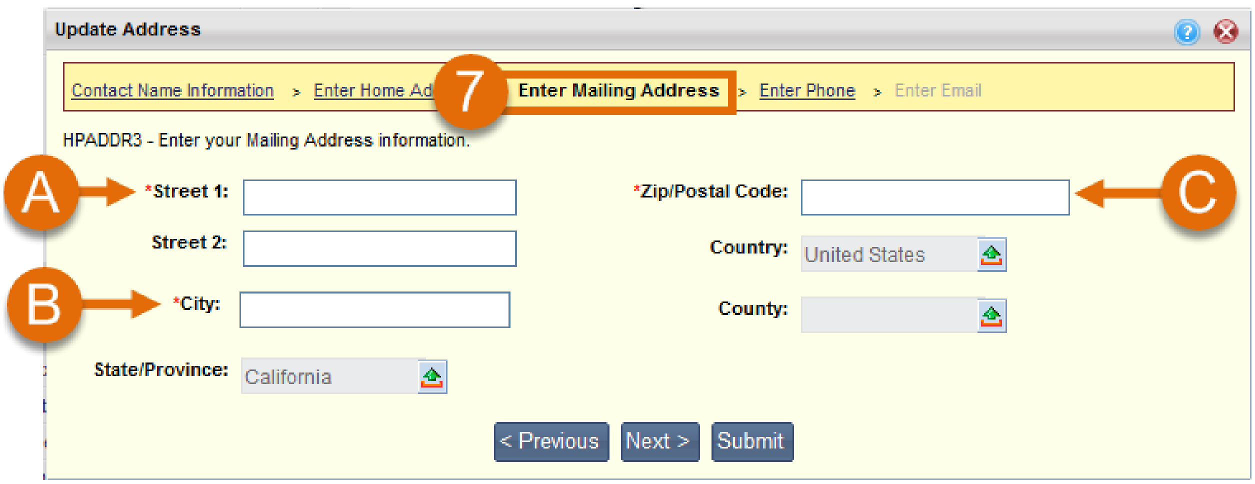
5. If applicable, use the pick list arrow for the following:
    A. **State/Province**
    B. **Country**
    C. **County**

6. If the home address is the same, click the **Same Mailing Address** checkbox.



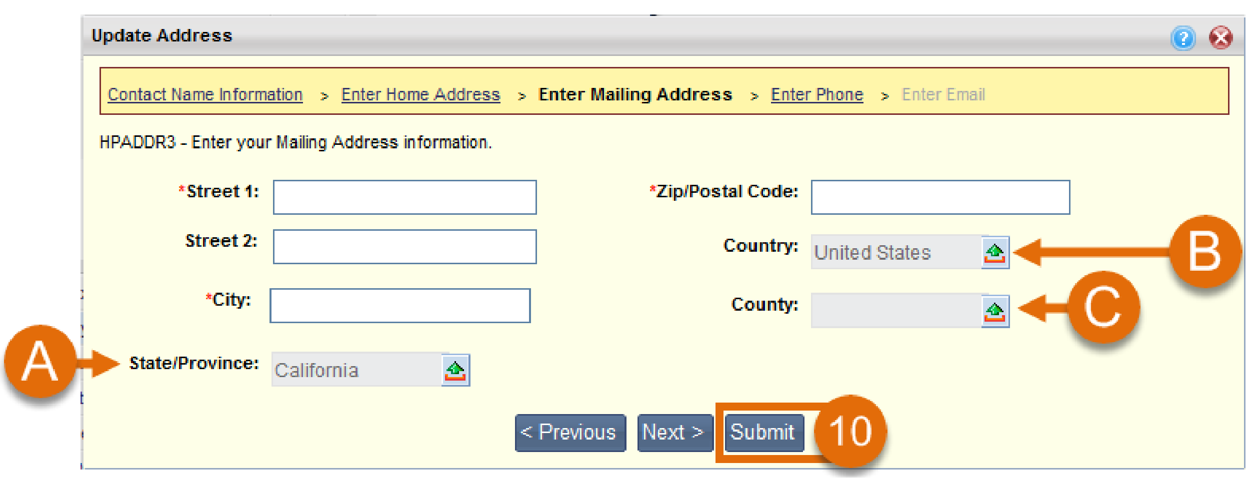
7. If the mailing address is different, navigate to and click **Enter Mailing Address** section.

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

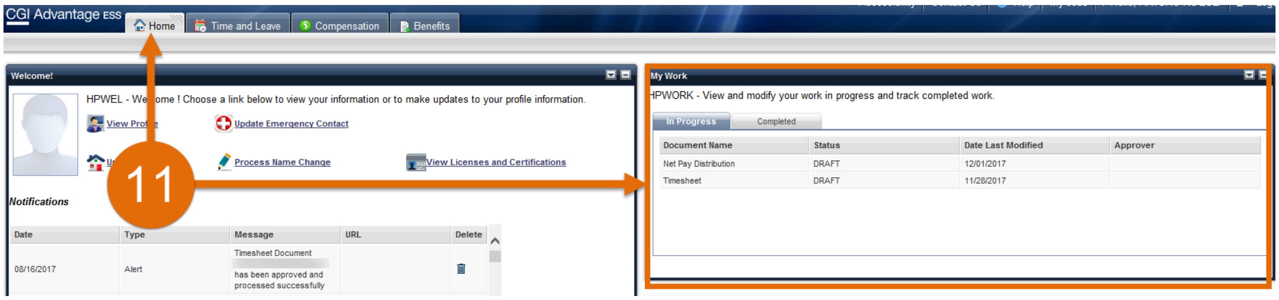


9. If applicable, use the pick list arrow for the following:
   A. **State/Province**
   B. **Country**
   C. **County**

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

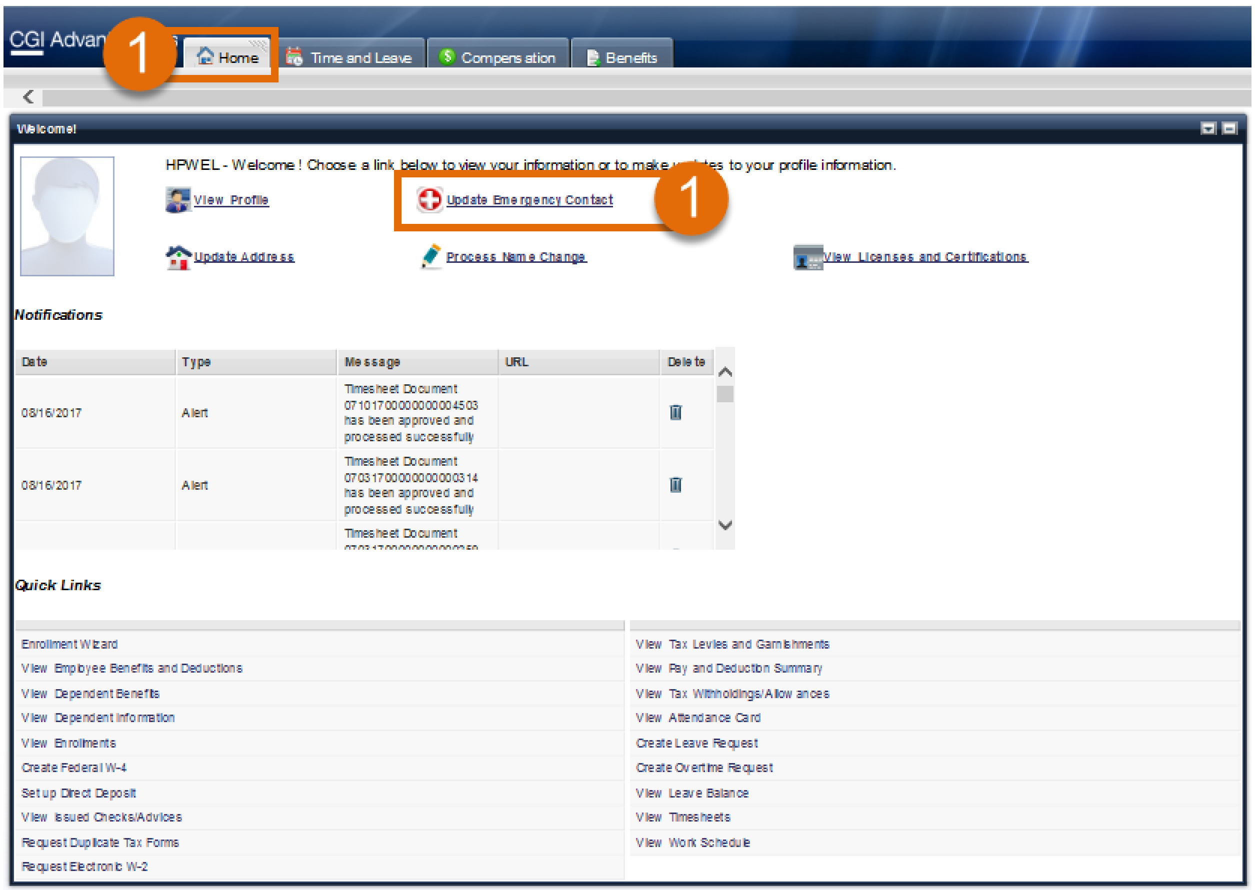


Emergency Contact

Interaction #1: To Insert an Emergency Contact

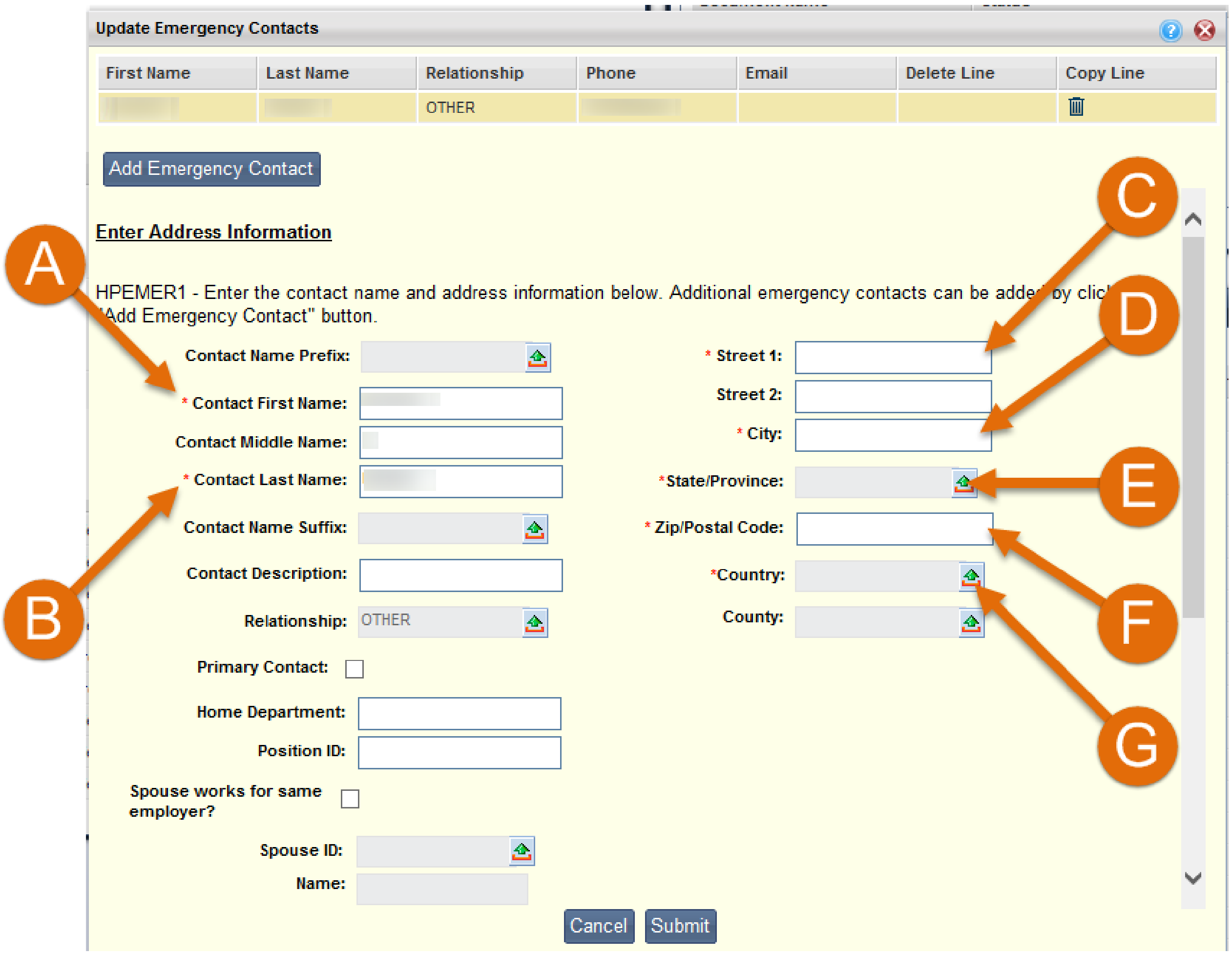
Description: For an employee to set up an Emergency Contact in ESS

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

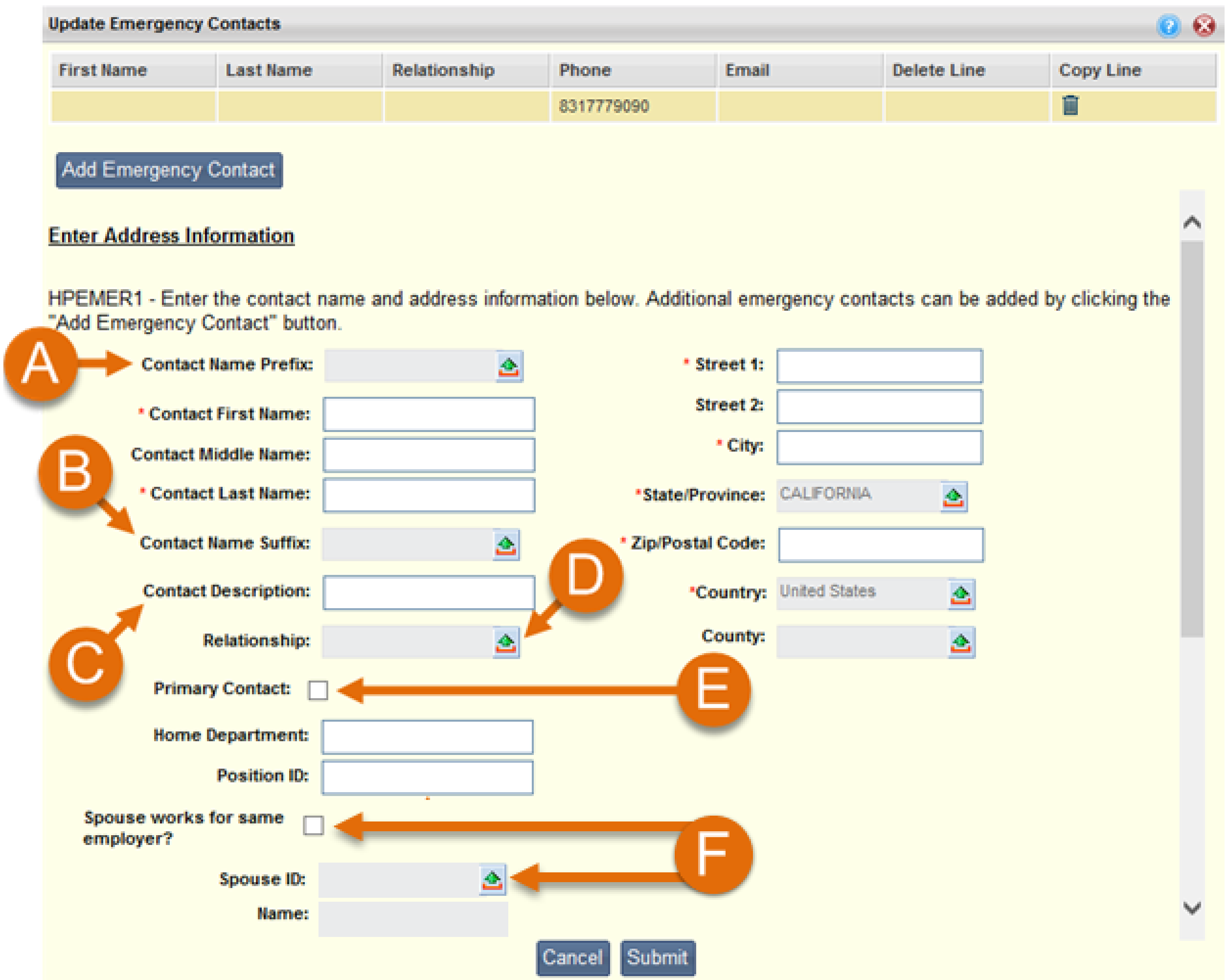


2. The **Update Emergency Contact** window will appear.

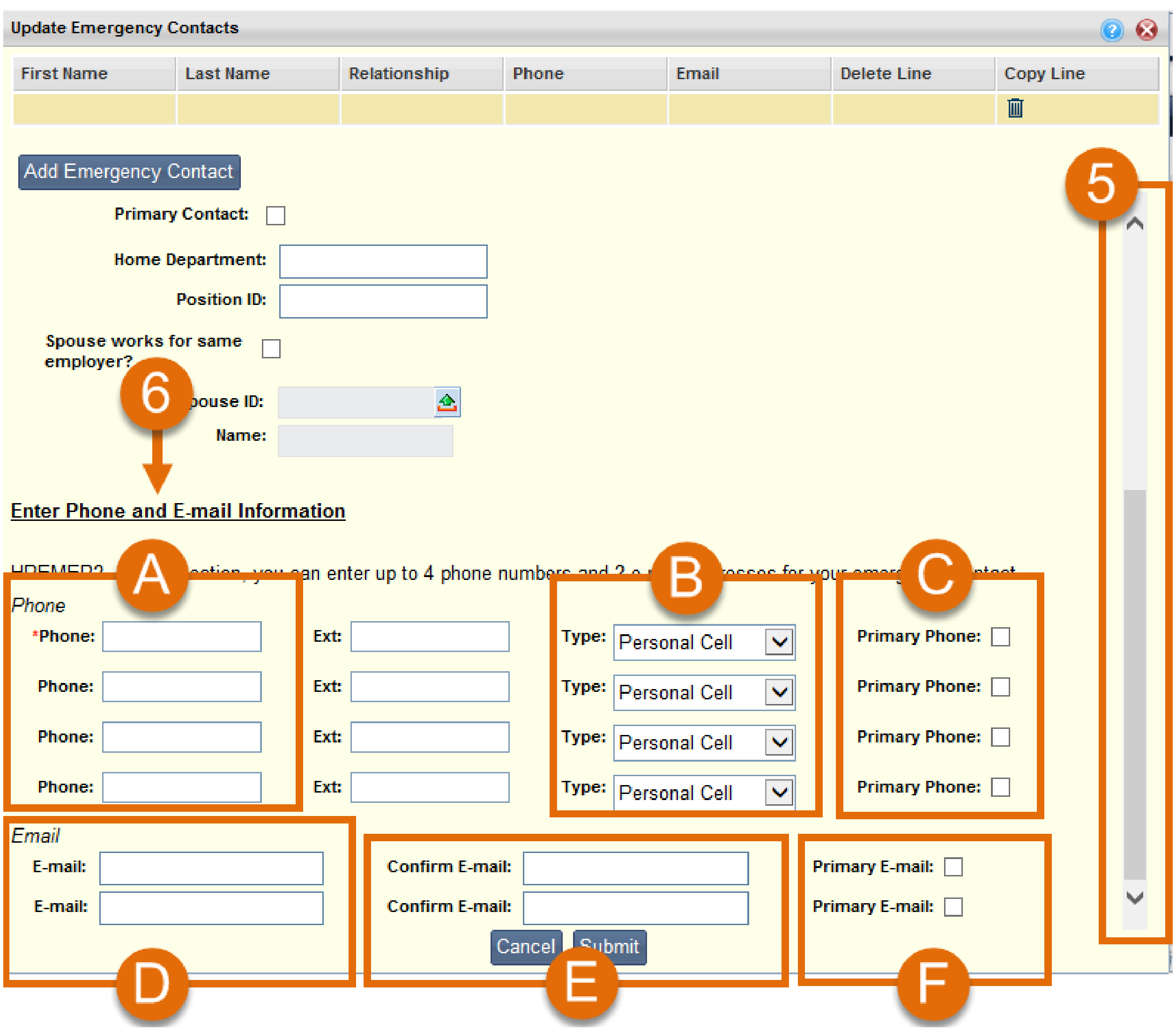
3. Under the **Enter Address Information** section, input demographic information:
    A. **Contact First Name**
    B. **Contact Last Name**
    C. **Street 1**
    D. **City**
    E. **State/Province**
    F. **Zip/Postal Code**
    G. **Country** (i.e. US = USA)



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 tha`t 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.

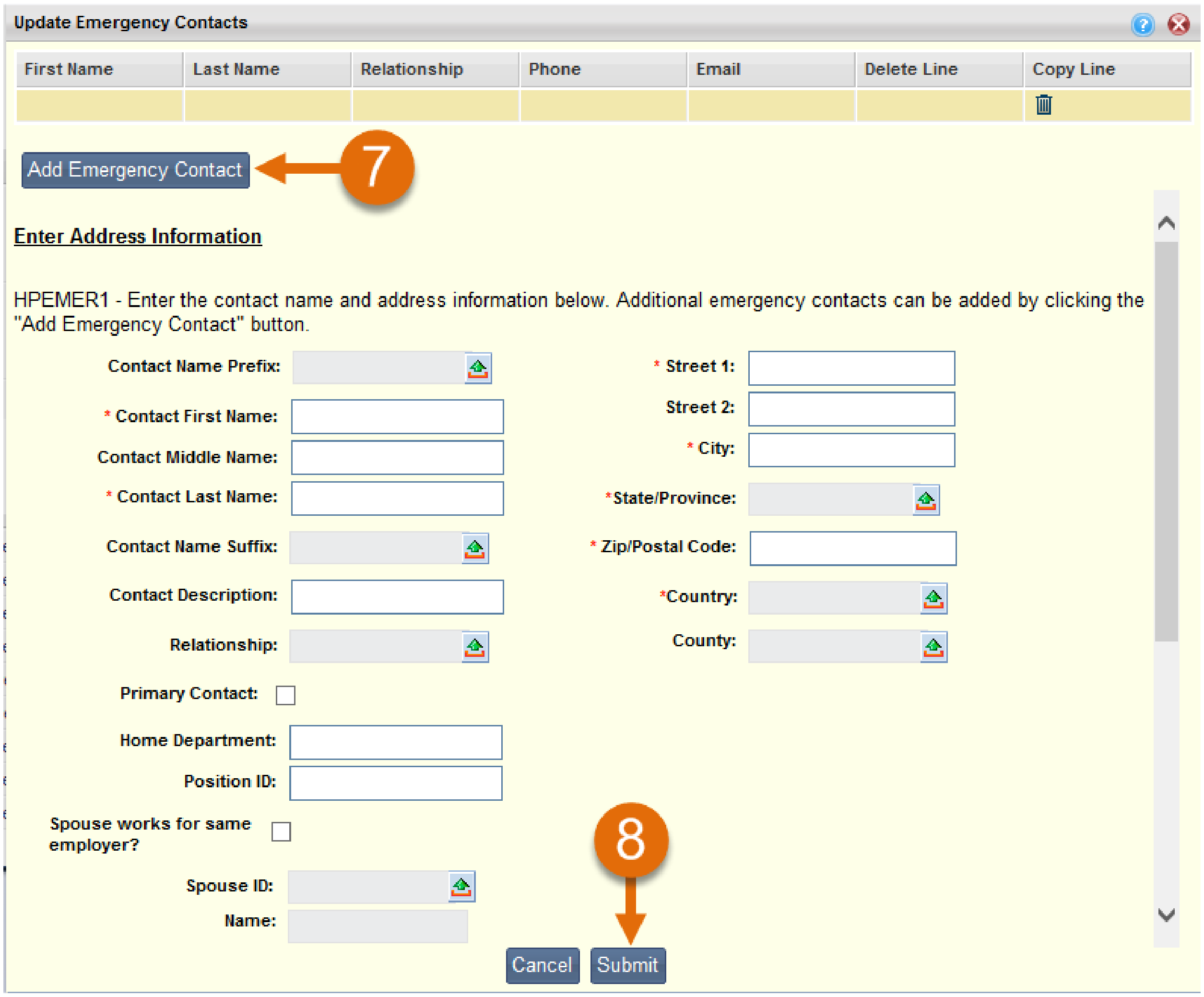


5. Use the scroll bar to navigate to the bottom of the page
6. Under the **Enter Phone and E-mail Information** section, input the following information:
    A. **Phone**
    B. Under **Type,** use the pick list to select the appropriate phone type
    C. Select **Primary Phone** next to the phone number 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.

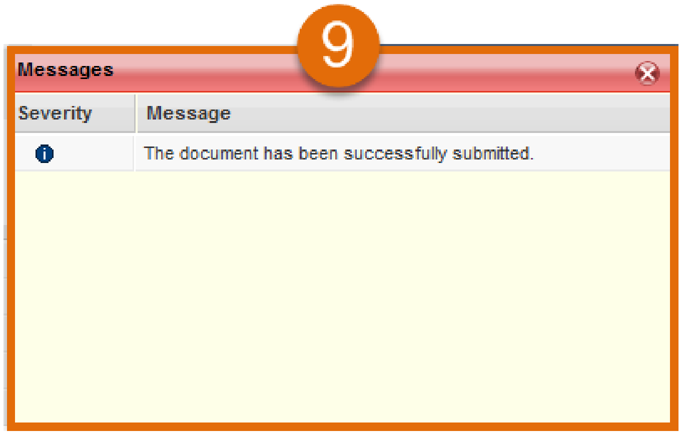


7. To add a second Emergency Contact, click **Add Emergency Contact.** Under **Enter Address Information** and **Enter Phone and E-mail Information** sections, repeat steps 3-6.

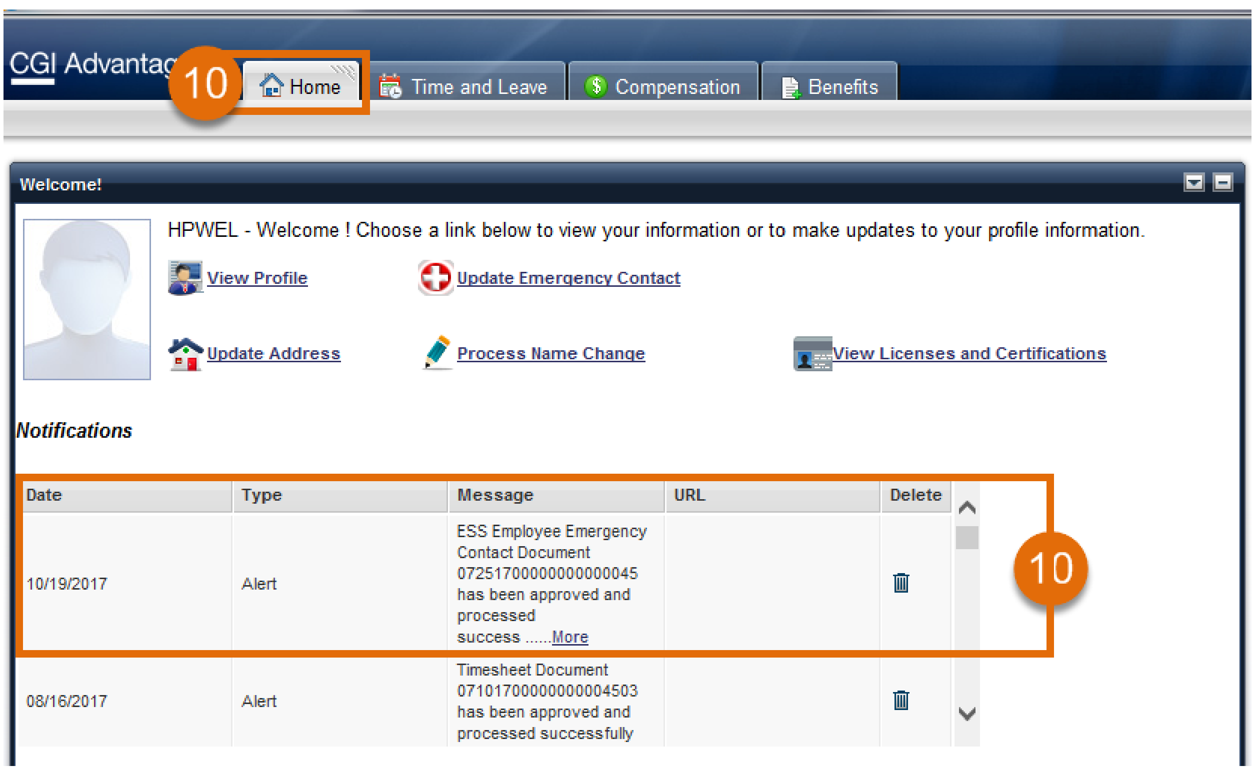
8. Review all the information and click **Submit**.



9. An automatic confirmation message will appear.



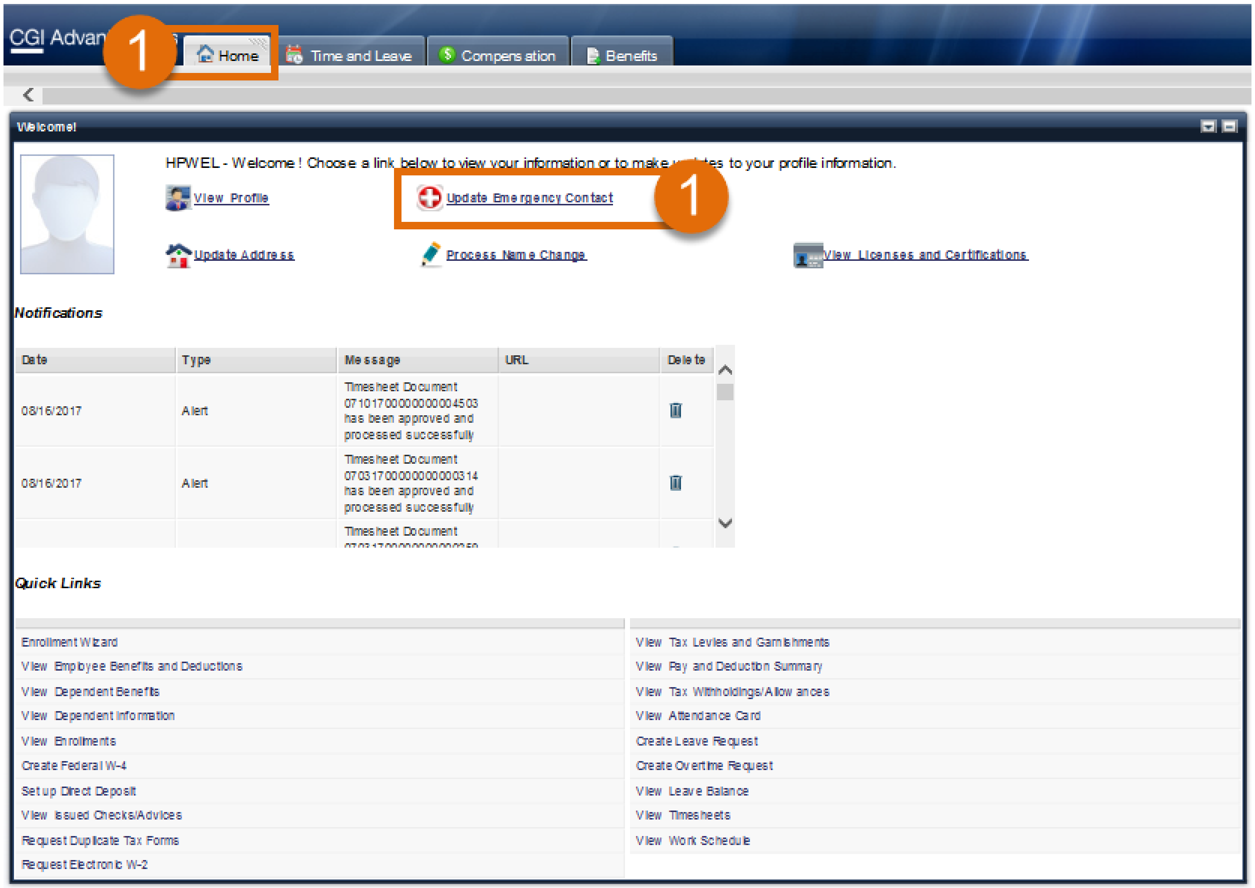
10. The employee can view the status of their document by clicking on the **Home** tab and locating the MYEMER document in their **Welcome!** widget.



Interaction #2: Modify Emergency Information

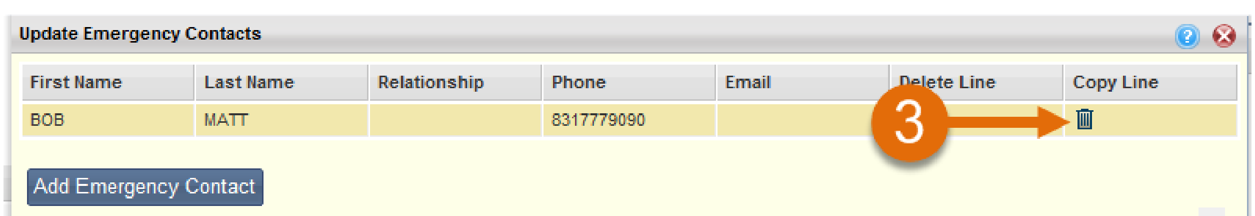
Description: Once an employee's Primary or Secondary Emergency Contact has been established, the employee can modify information.

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

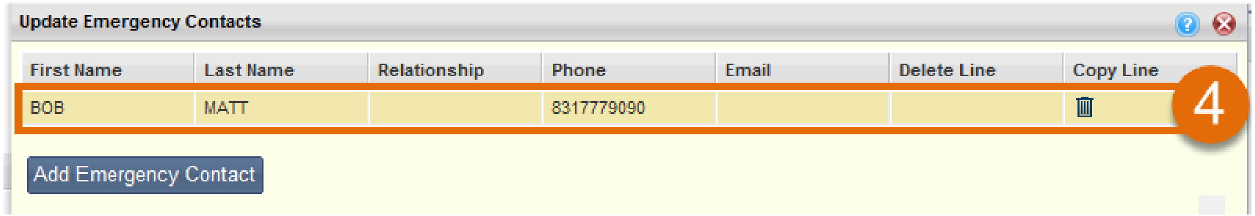


2. The **Update Emergency Contact** window will appear.

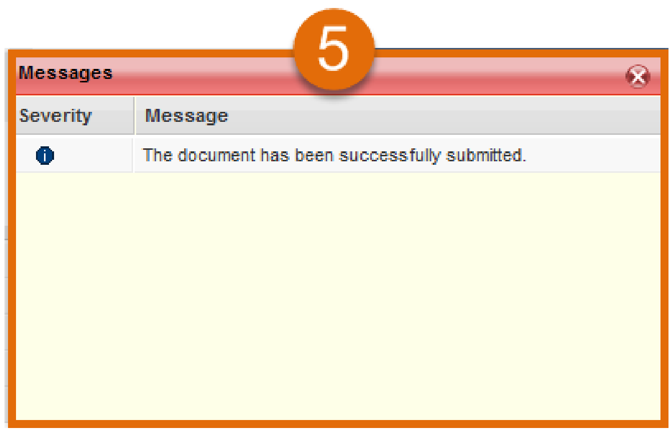
3. To delete a contact information, click on the the TRASH CAN icon under **Copy Line** next to the emergency contact's name.



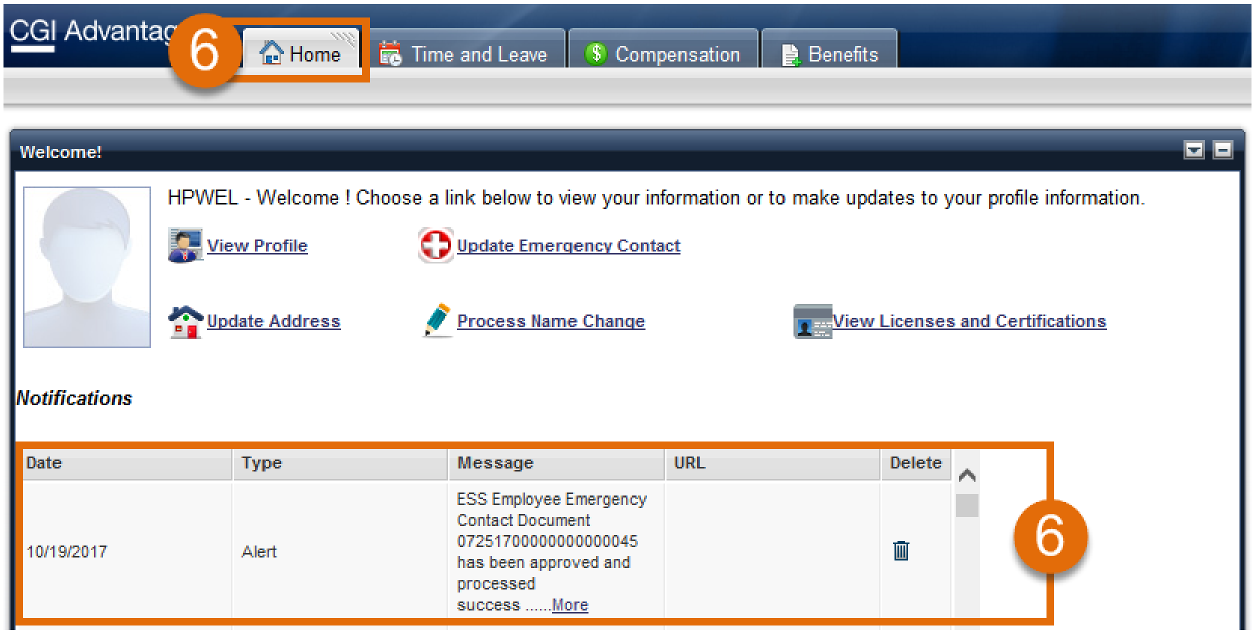
4. To modify the Emergency Contact Information, select the emergency contact, and repeat steps 3-6 of ***Interactions #1: To Insert an Emergency Contact***.



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.



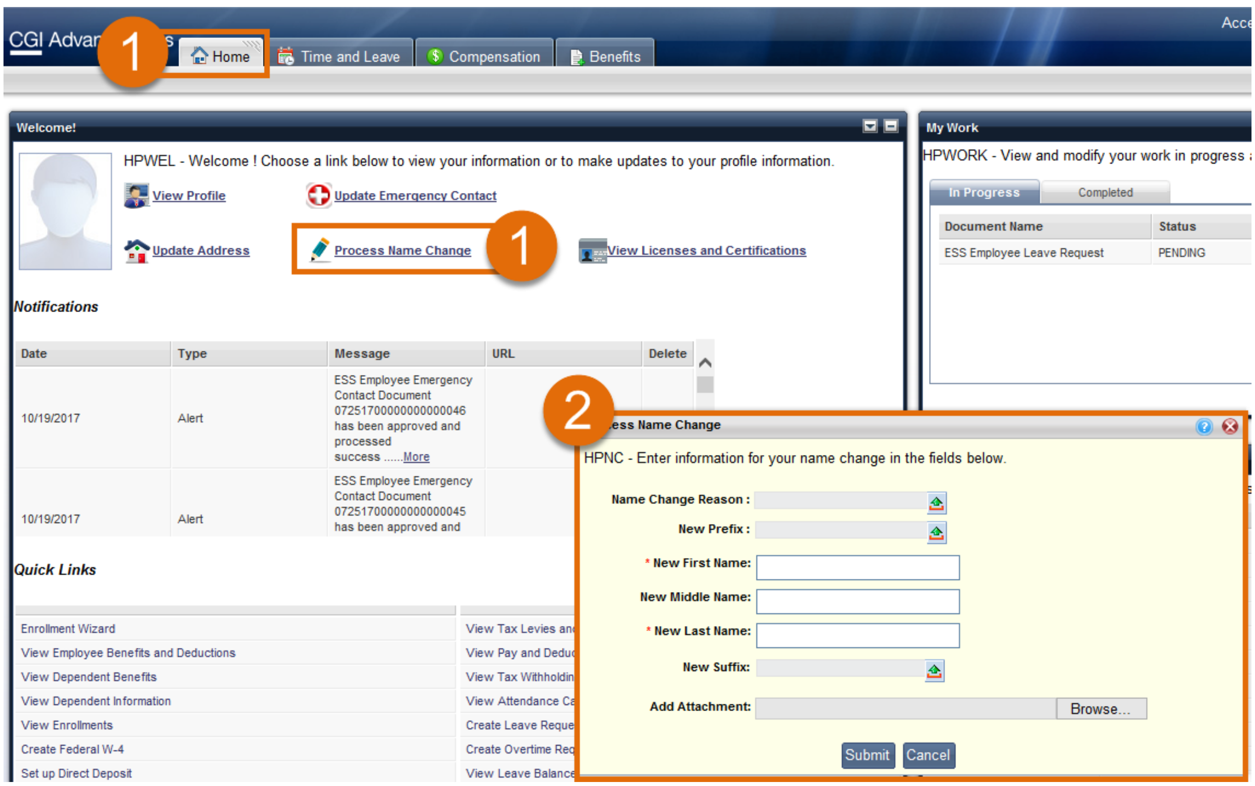
Employee Name Change

Interaction #1: To Update Name

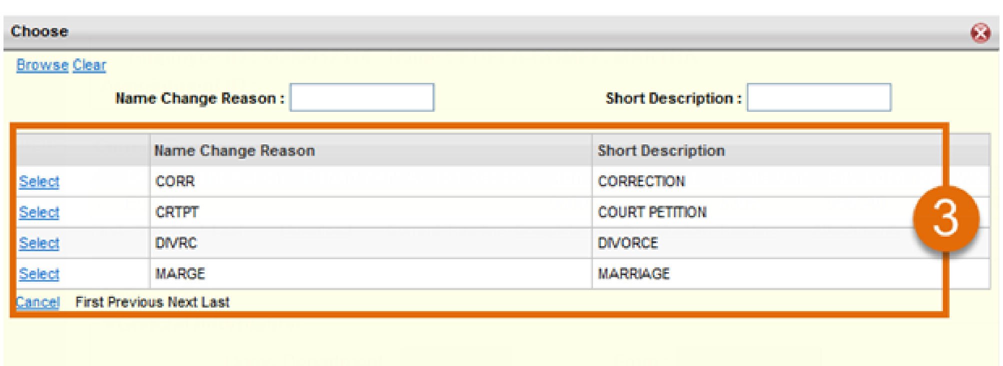
Description: For an employee to update their name in the system.

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

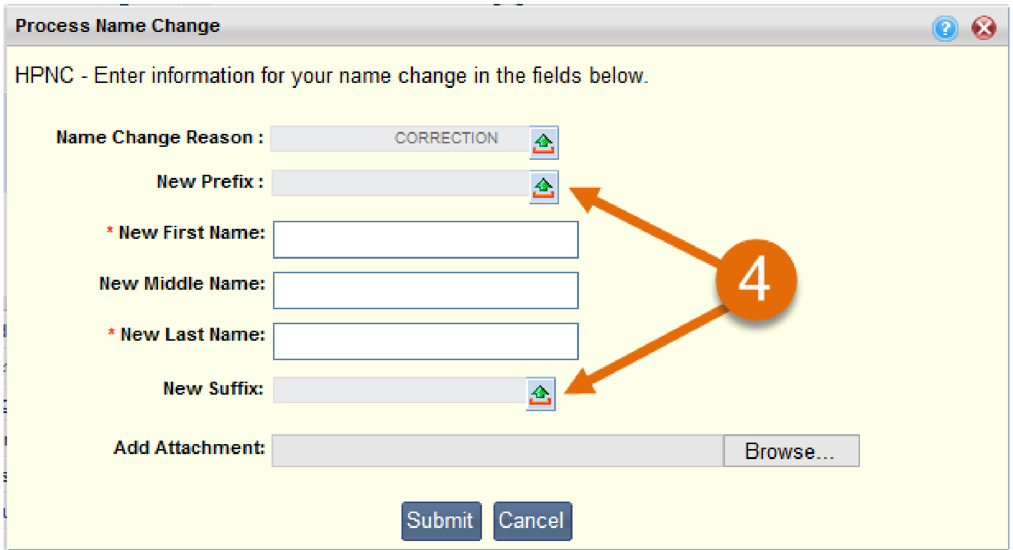
2. The **Process Name Change** widget will appear.



3. Use the pick list arrow for **Name Change Reason** to select the appropriate option.

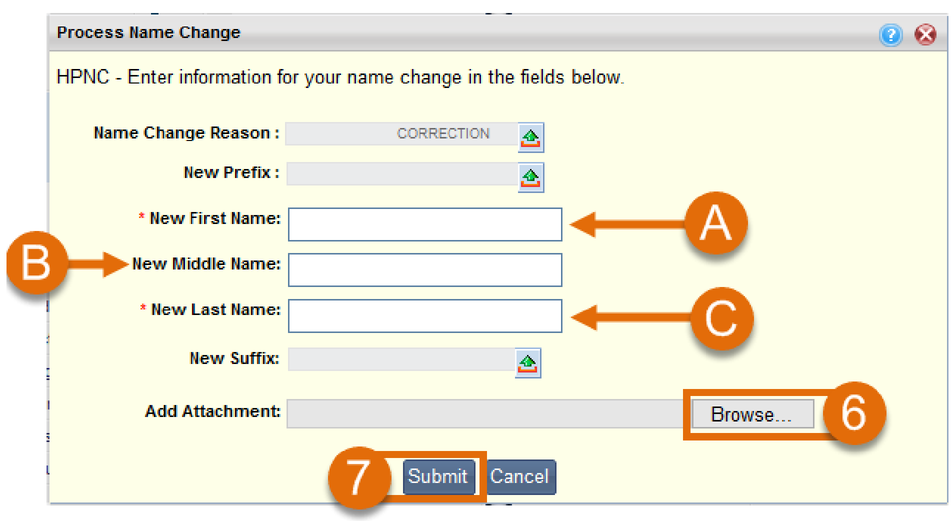


4. If applicable, use the pick list arrow for **New Prefix** and **New Suffix** to select the appropriate option.

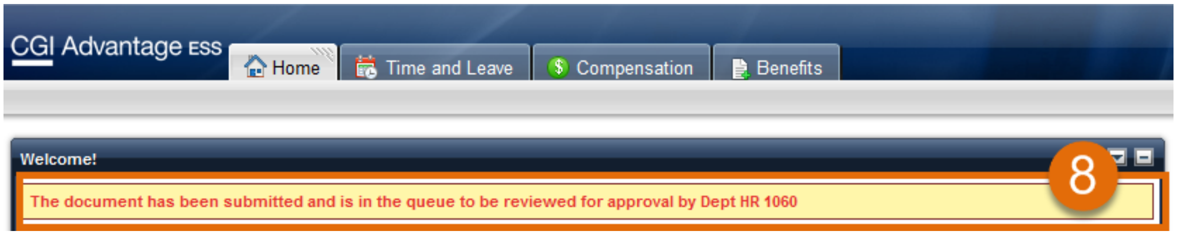


5. Insert the applicable information:
   A. **New First Name** (if no changes are needed, insert current first name)
   B. **New Middle Name**
   C. **New Last Name** (if no changes are needed, insert current last name)

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



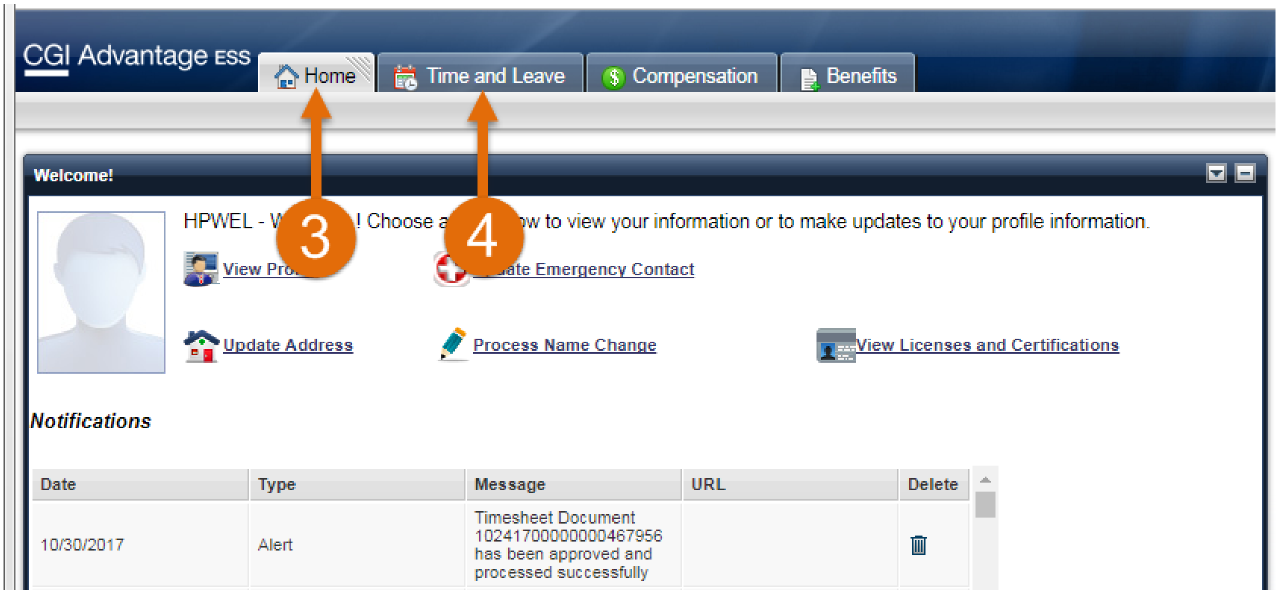
Timesheet Submittal for a Positive Paid Employee

- 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.
  - The Personnel Policies and Practices Resolution (PPPR).
- 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

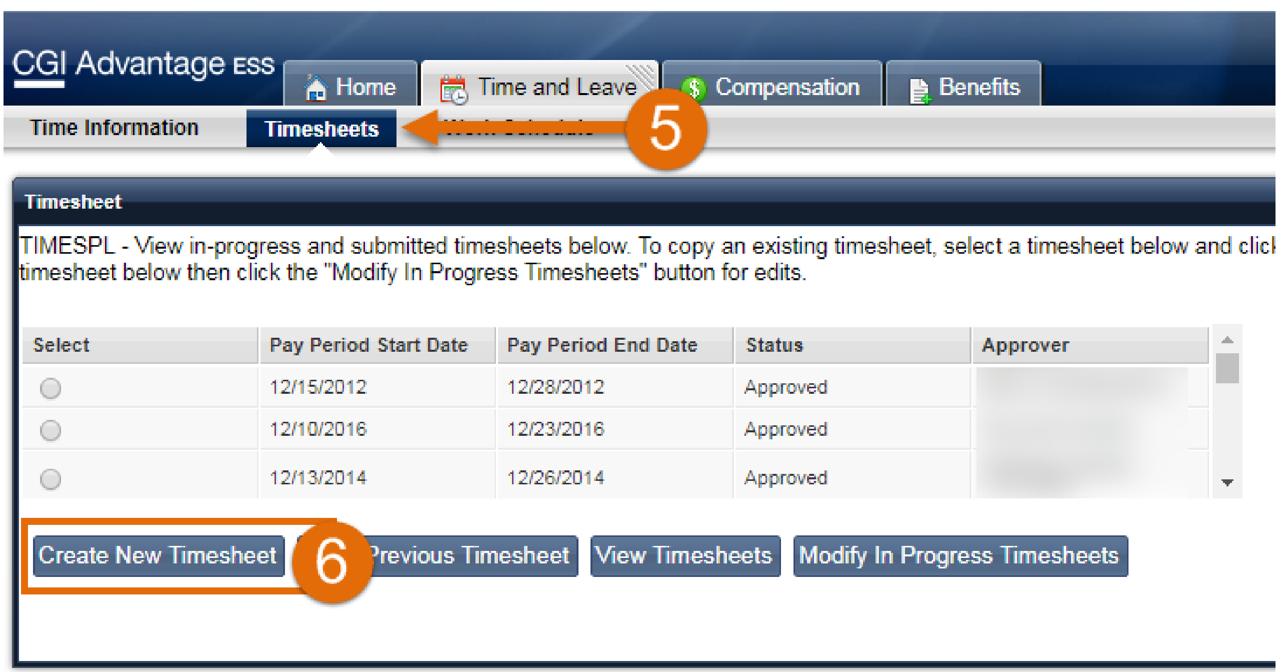
Description: For an Hourly Employee to complete a timesheet

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

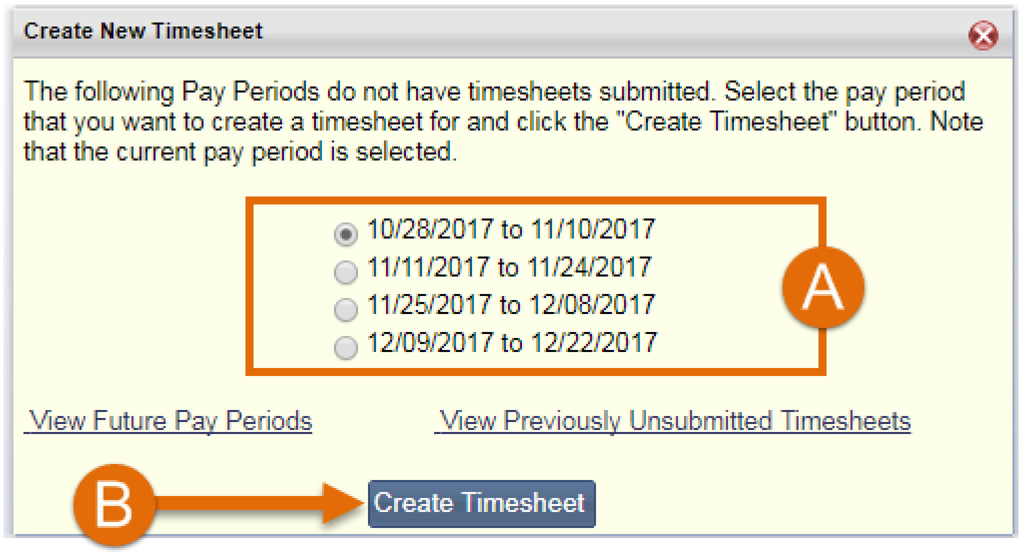


2. Click the **Timesheets** sub-tab.

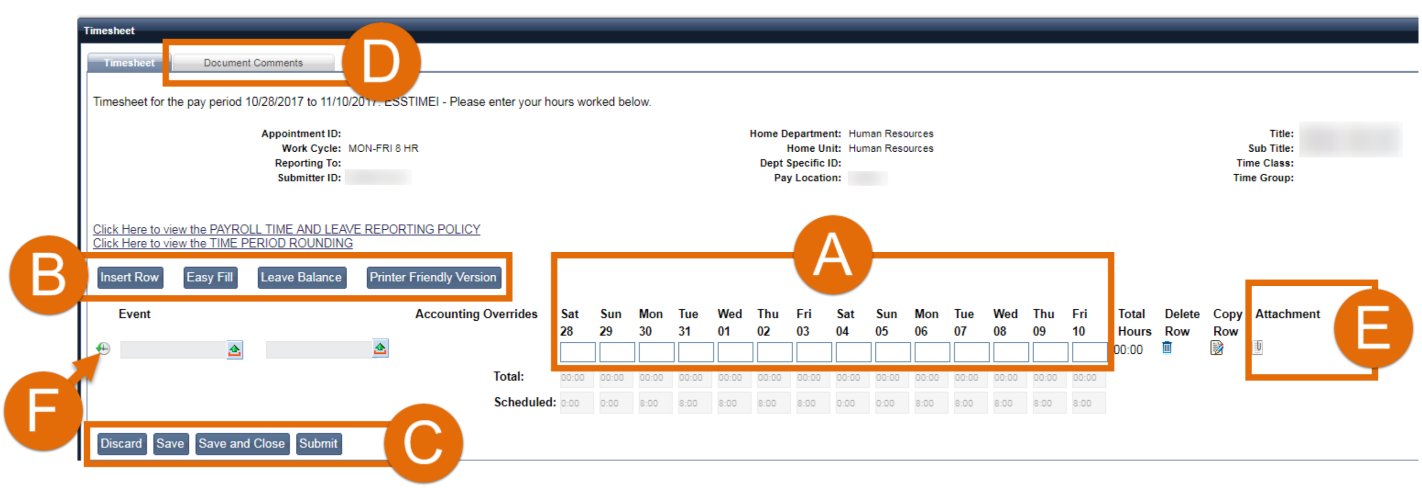
3. Click **Create New Timesheet**.



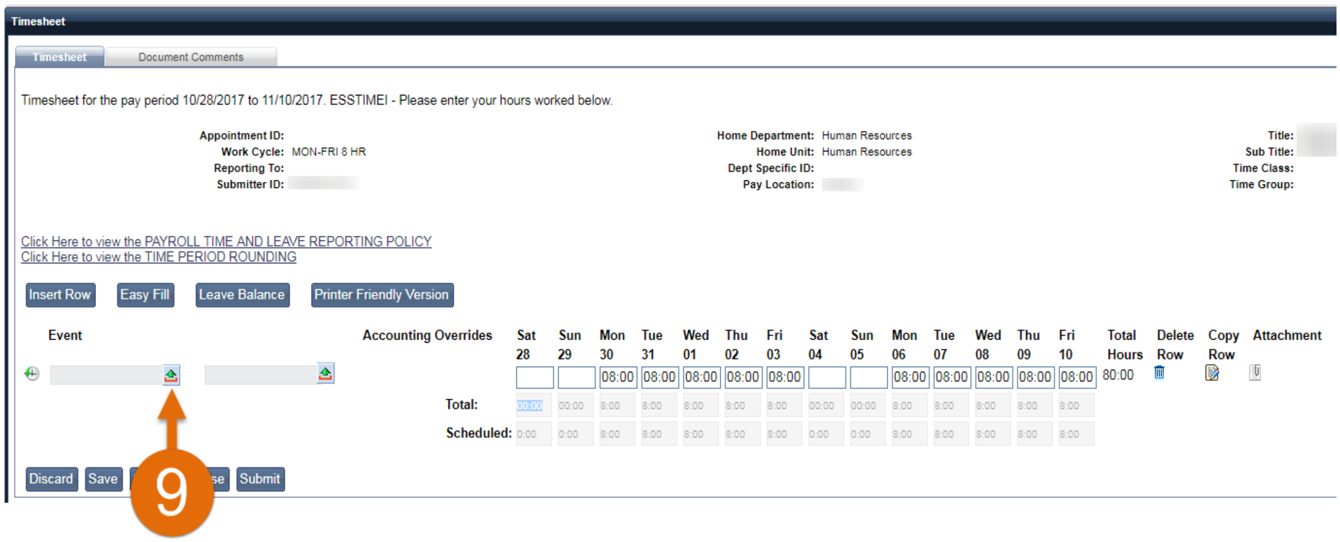
4. A new window displaying pay periods will appear:
    A. Select the appropriate pay period.
    B. Click **Create Timesheet**..



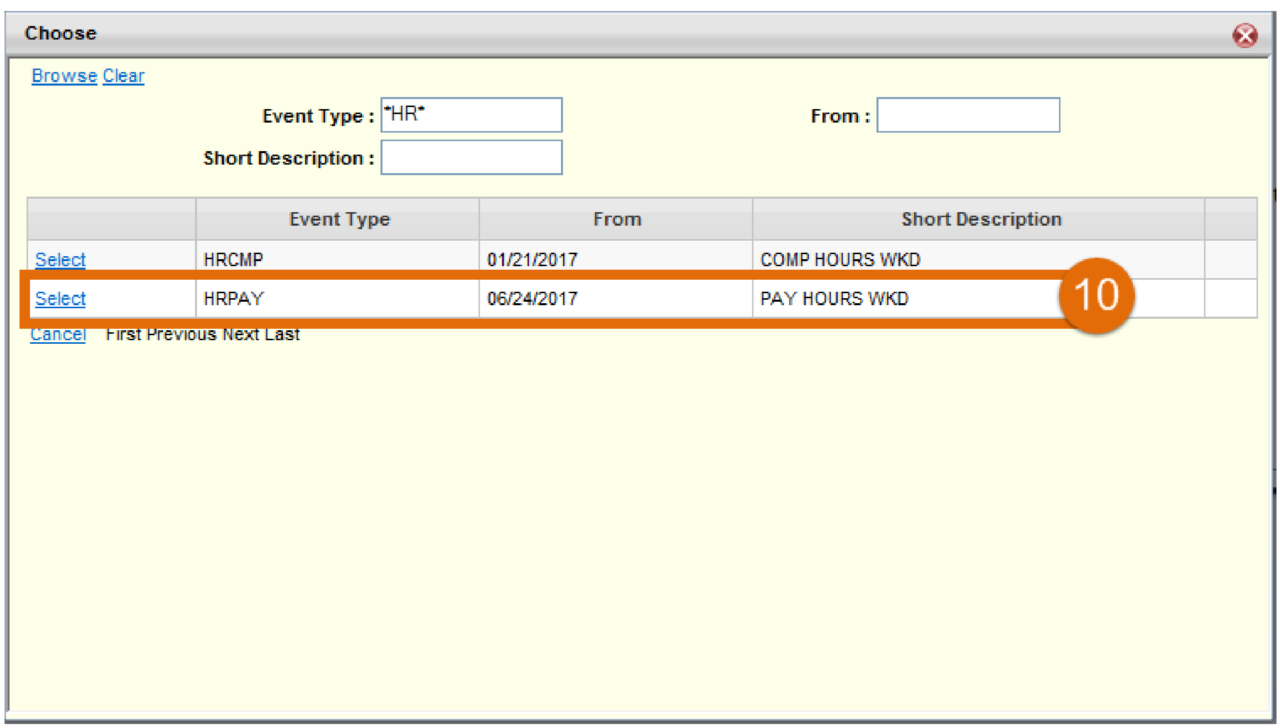
5. New Features:
    A. Your timesheet for the entire pay period is on *one* page.
    B. The **Insert Row**, **Easy Fill**, **Leave Balance** and **Printer Friendly Version** links are in a *new* location.
    C. There are new features and options when completing your timesheet: **Discard**, **Save**, **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**.



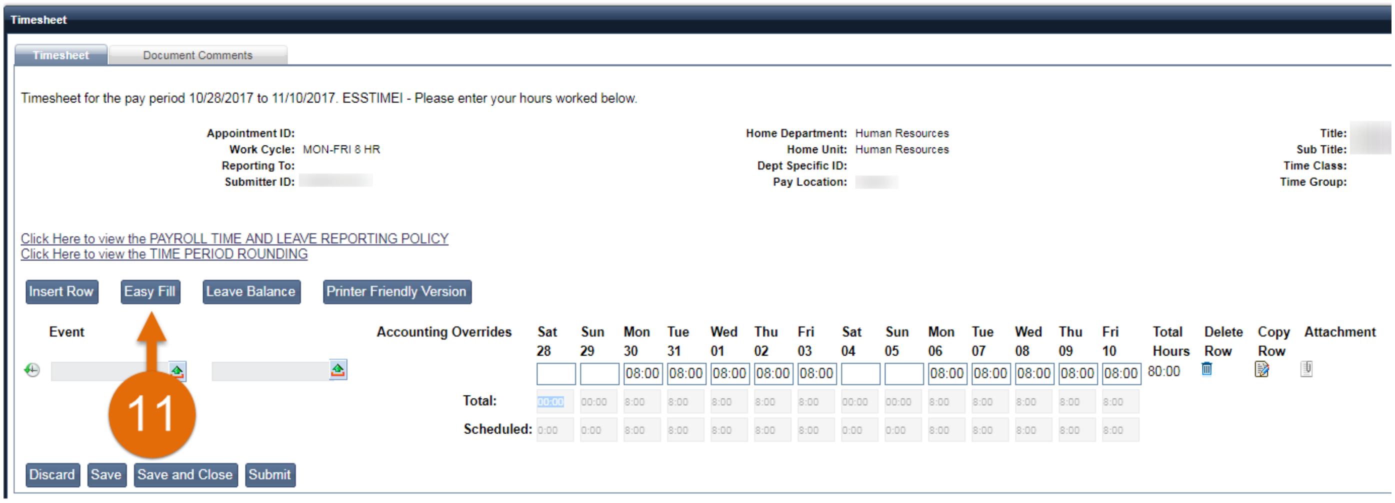
6. Click on the Event Pick List to choose an Event Type.



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.).



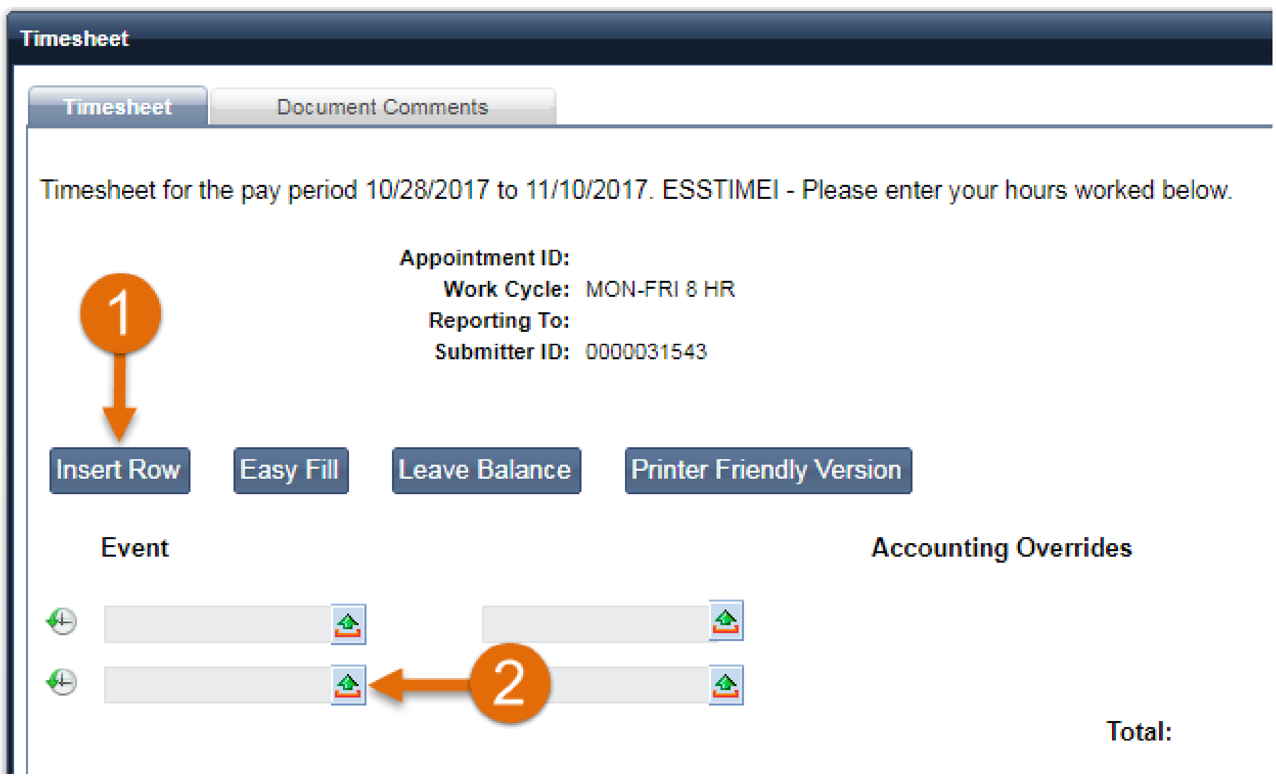
Interaction #2: Entering Leave

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.*

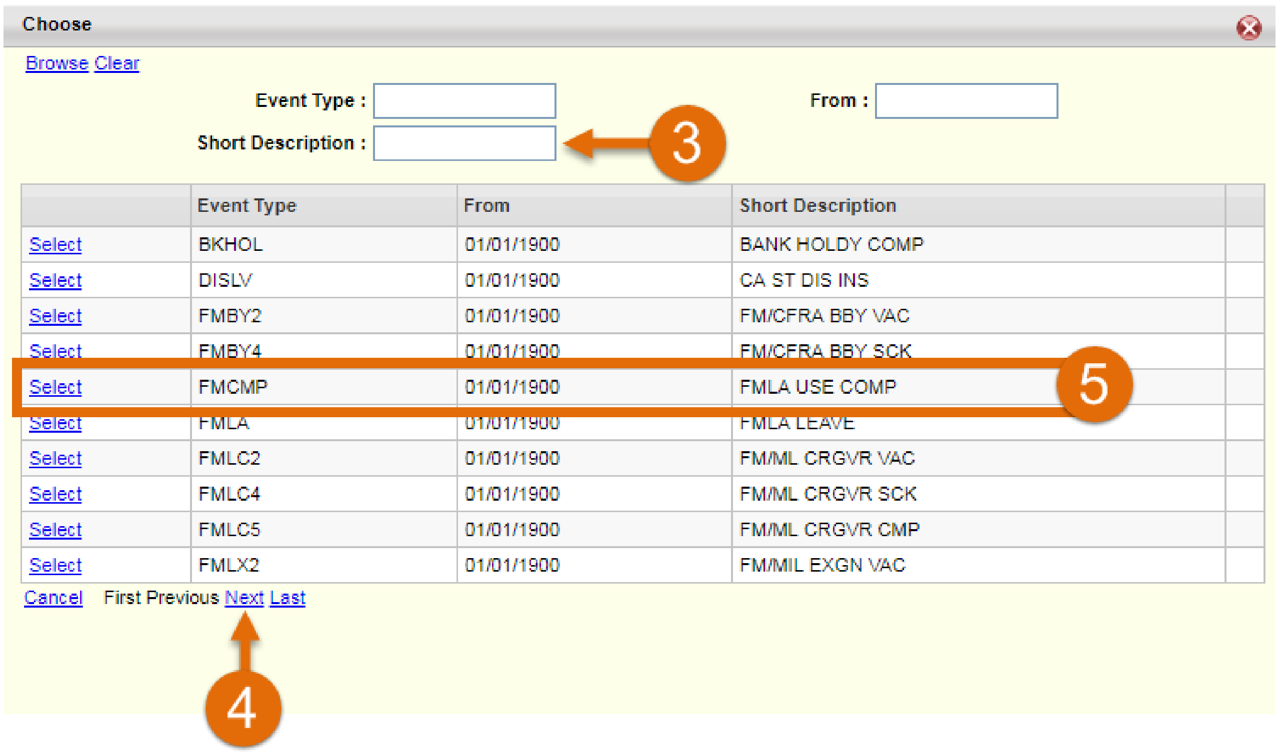


3. Type part of the leave event into the **Short Description** field, encapsulated in asterisks then click **Search** (e.g., *ANNUAL*), or

4. Click the **Next** button repeatedly until you locate the leave event type.
5. Click **Select** to populate the intended leave type.

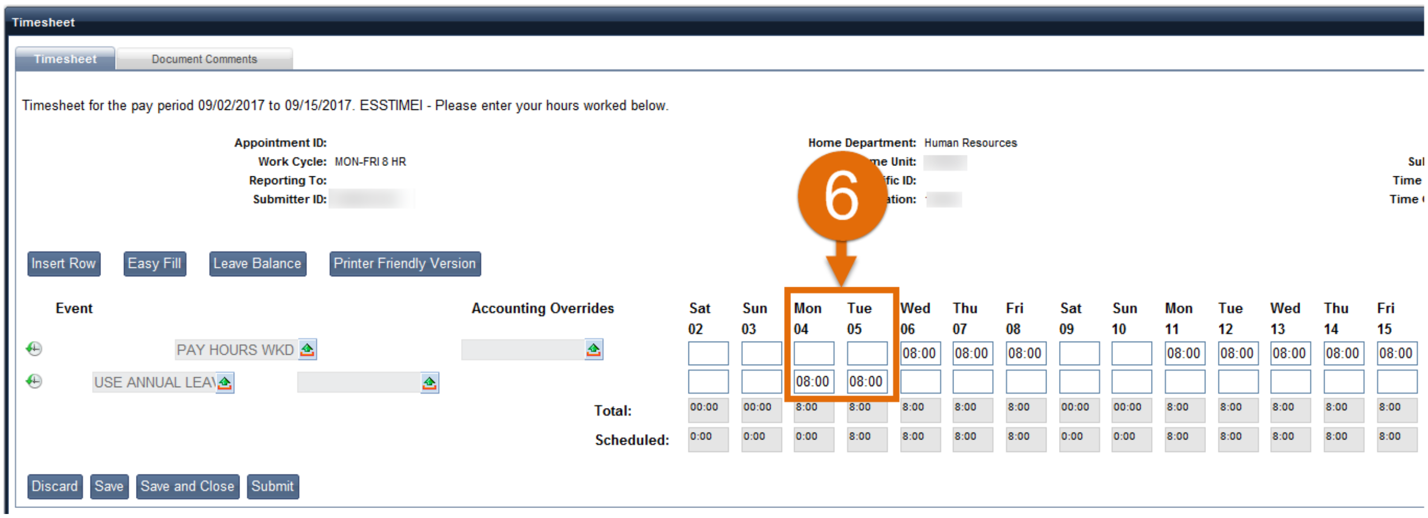
__Hint #2:__ To assist your search efforts, use asterisks (*) as wildcard characters.

__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

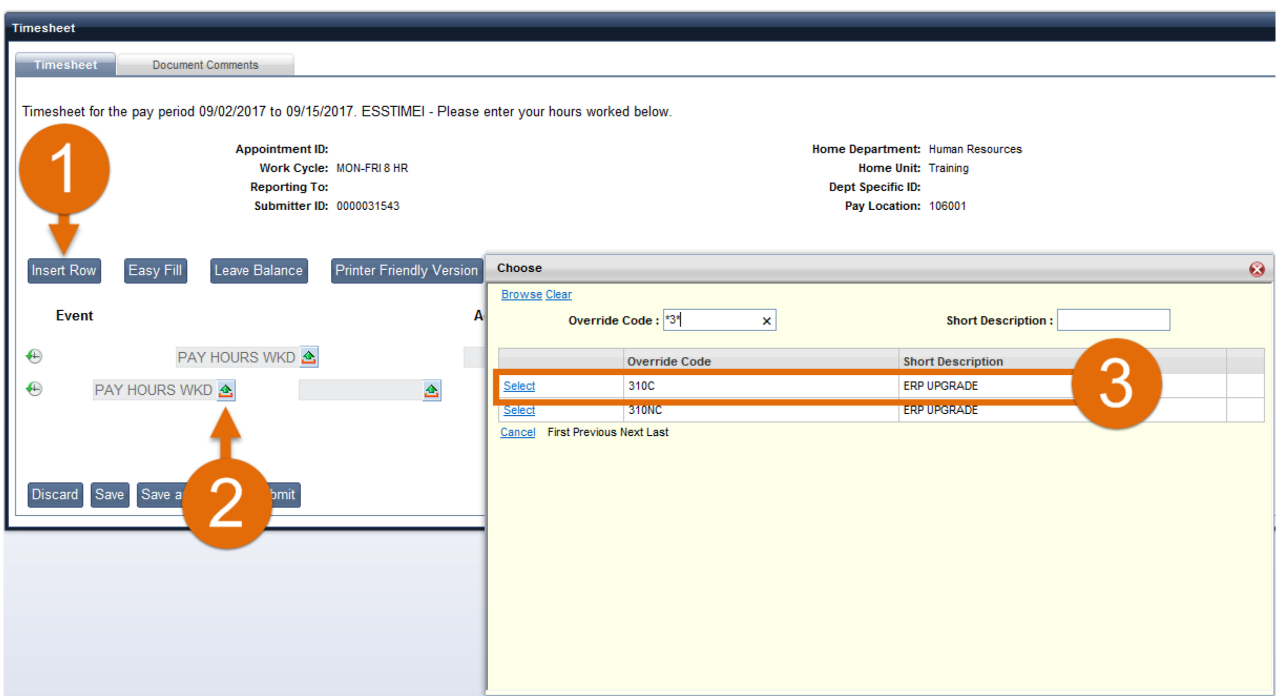
Description: For an employee to use override codes

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.

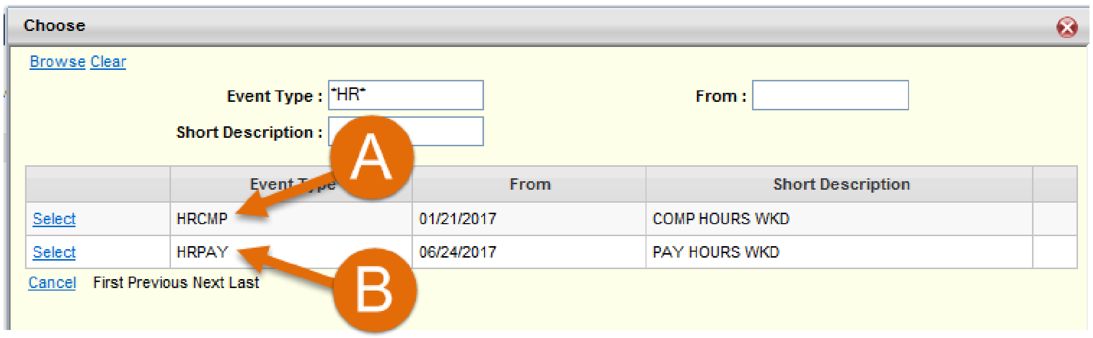
Note: *The example below illustrates an employee charging time to a single override code (310C). The hours associated with this override code will be charged to its preset internal accounting structure. The remaining hours not associated with the override code will be charged to the employee’s regular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



Interaction #4: Entering Overtime on Your Timesheet

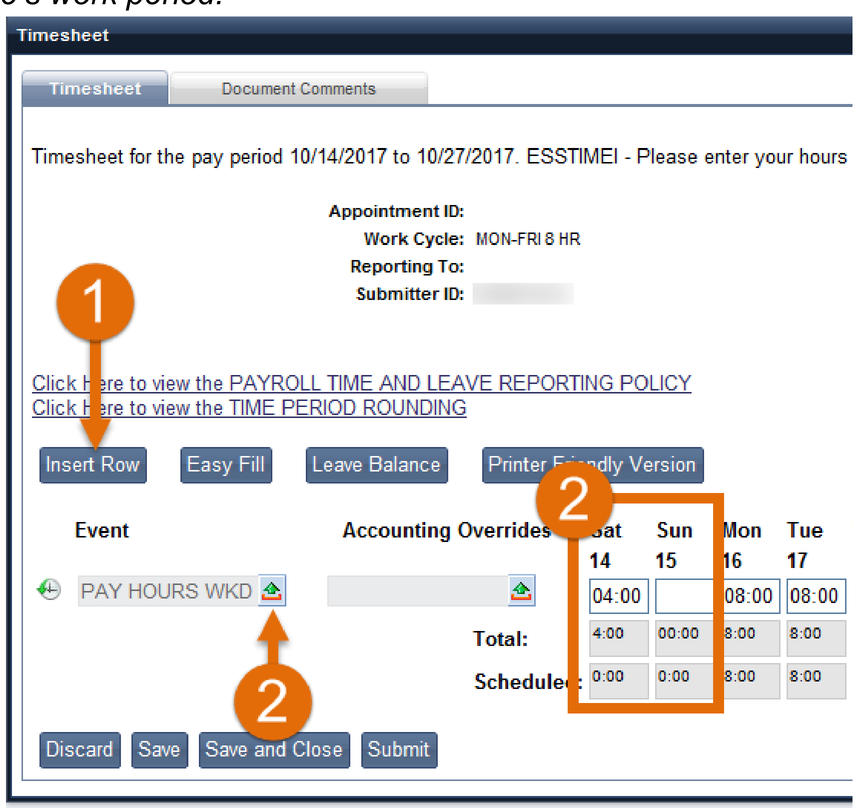
Description: Entering overtime on a timesheet for an Hourly Employee

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.

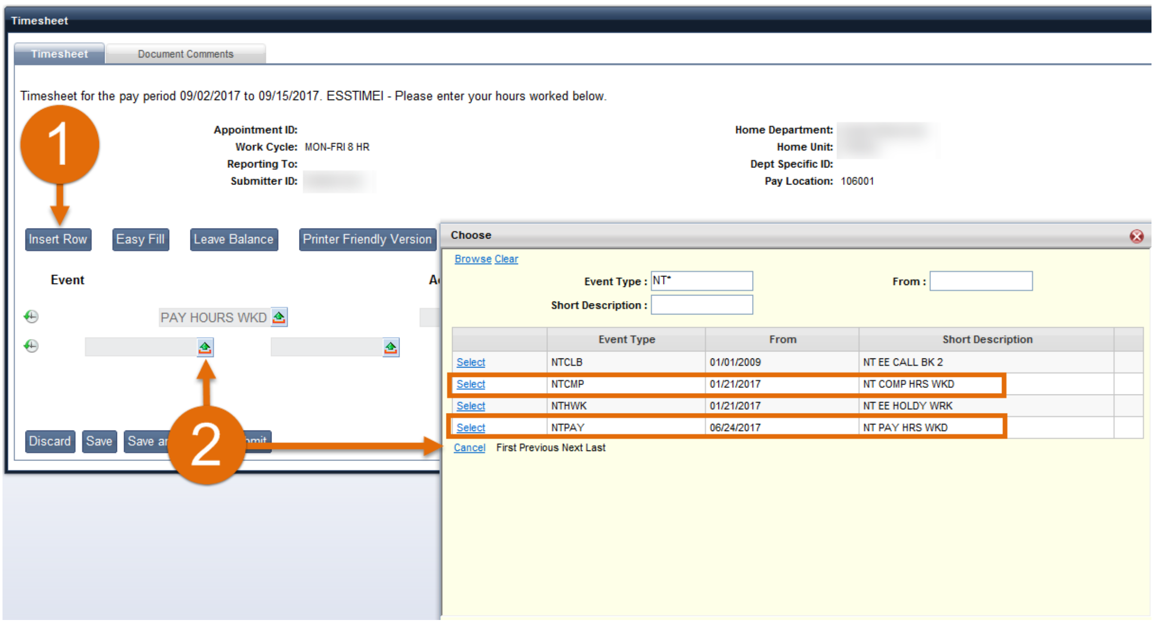
Note: *The example below illustrates an employee entering overtime on Saturday of week. This will result in the employee being paid at an overtime rate in excess of an employee's work period.*



Interaction #5: Entering Shift Differentials on the Timesheet

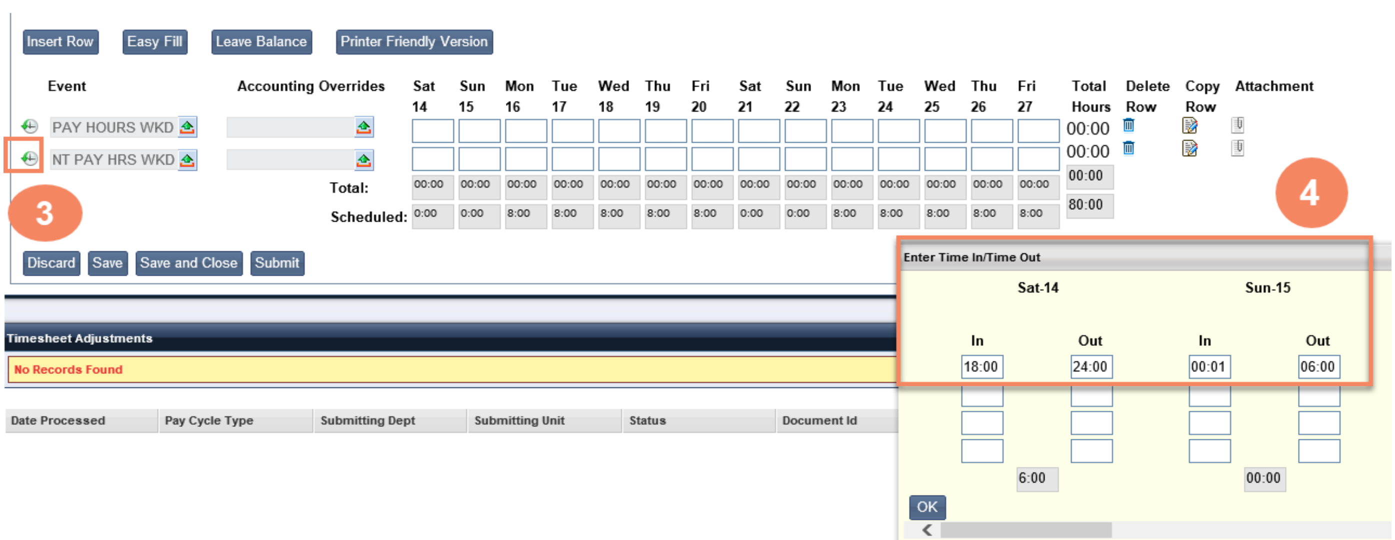
Some employees are entitled to shift differentials depending on actual time hours worked per their MOU. These employees will use the **Time In/Time Out** feature of the timesheet.

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.

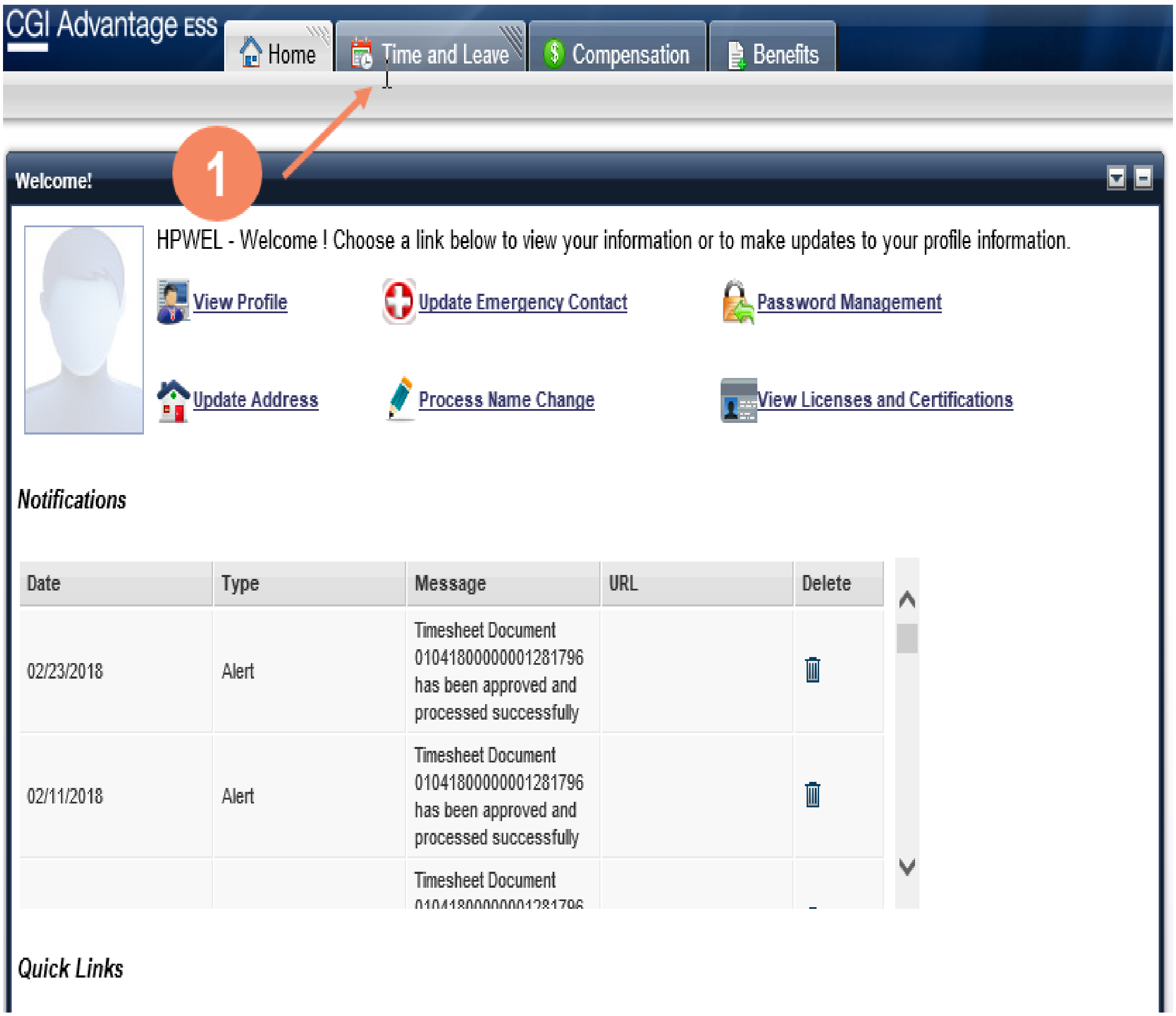
Note: *If leave is taken during the week, a new "time row" must be added to the timesheet for the appropriate leave event (e.g., vacation, sick).*



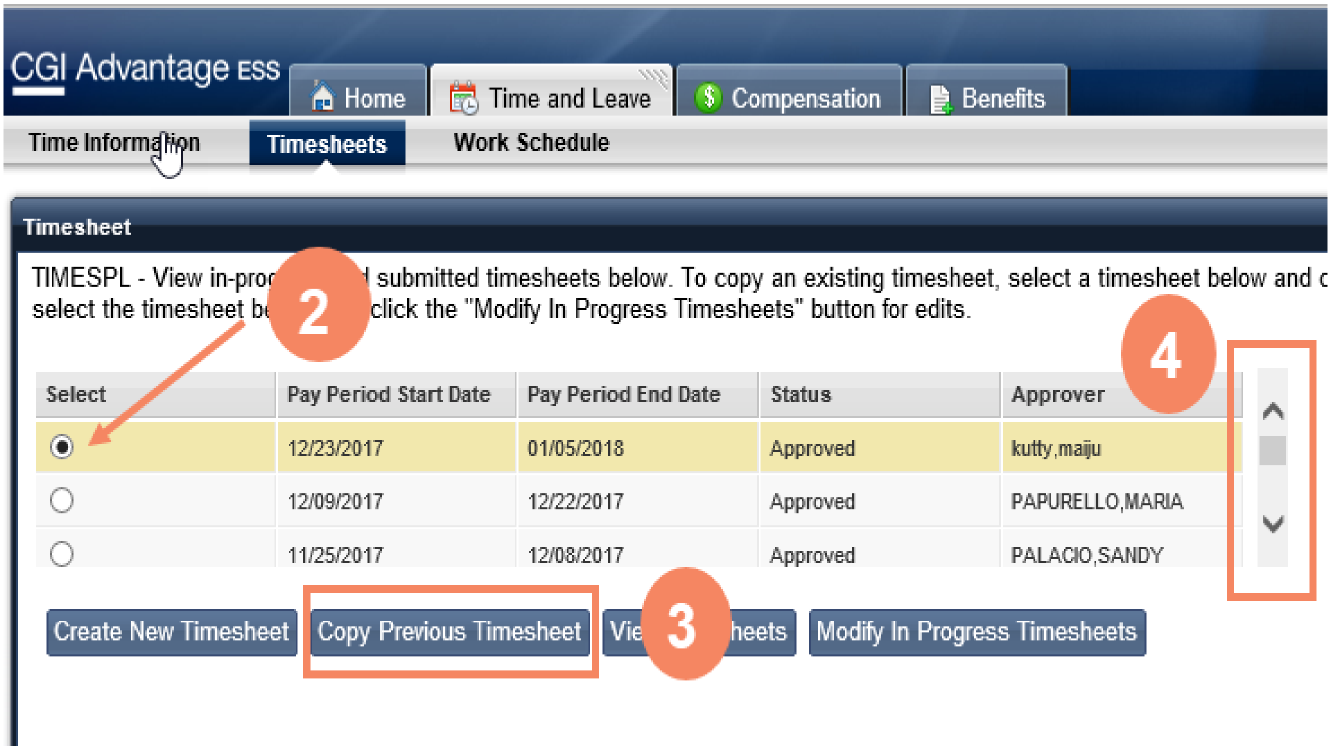
Interaction #7: Copy a Timesheet

Description: For an employee to copy a previous timesheet

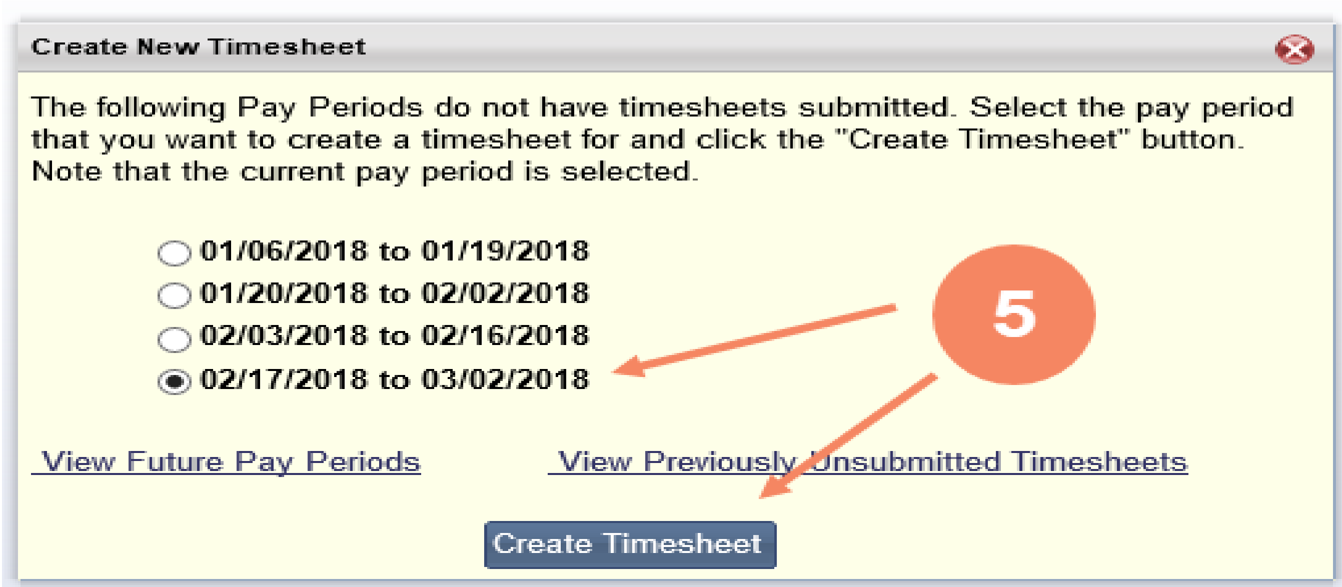
1. Select **Time and Leave** on the Home Page.



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.

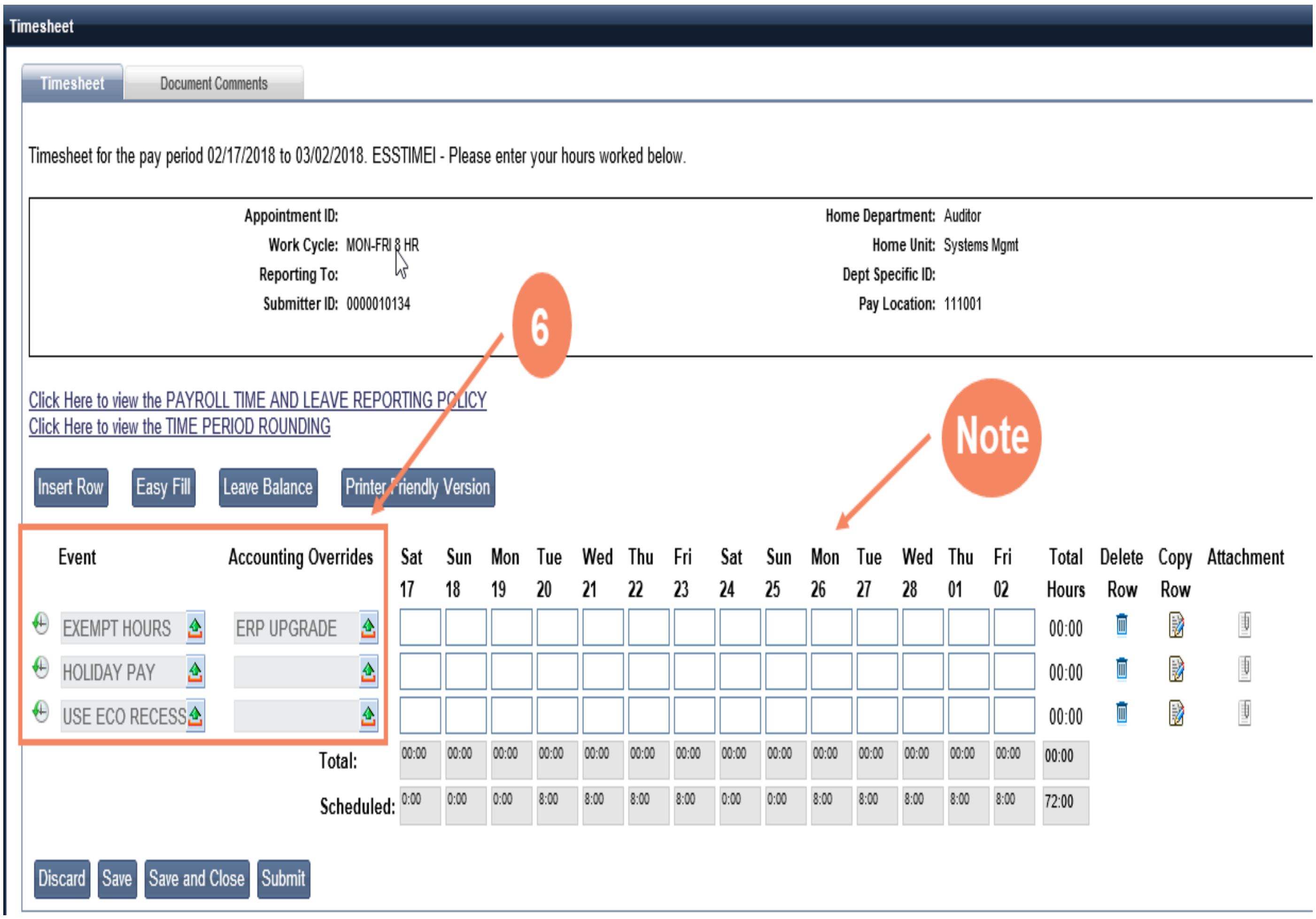


5. Select the pay period for which you would like to create a timesheet and click **Create Timesheet button.**



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

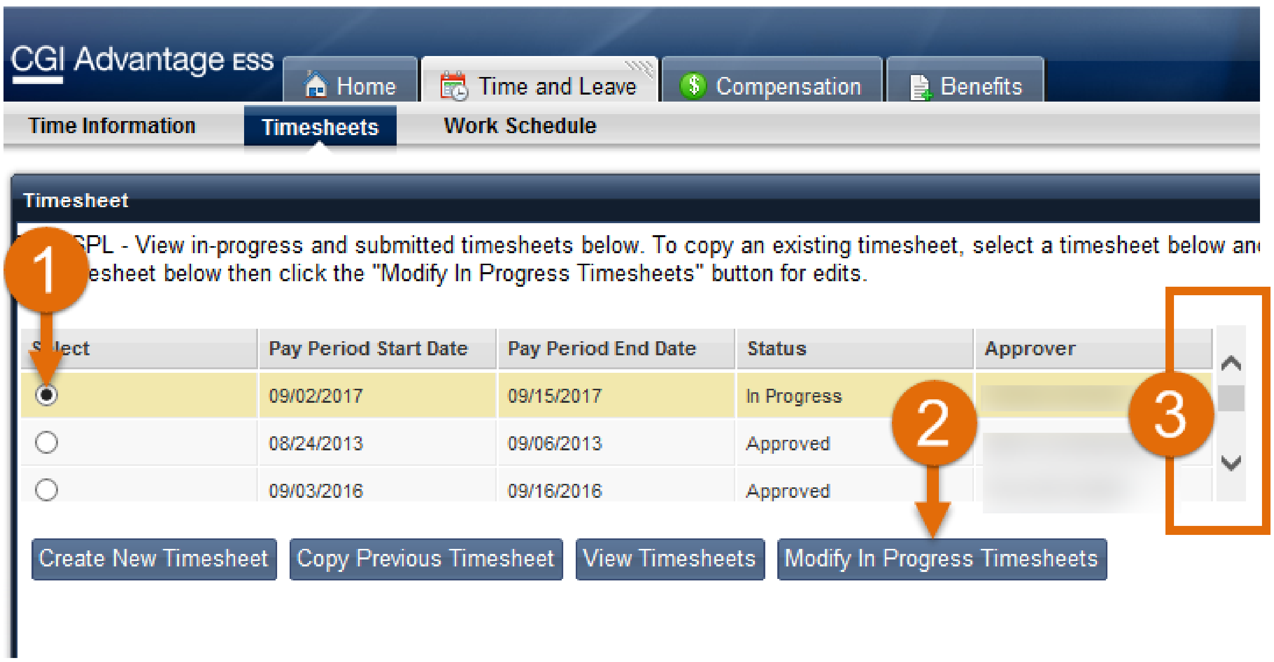
Description: For an employee to modify an incomplete timesheet

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.



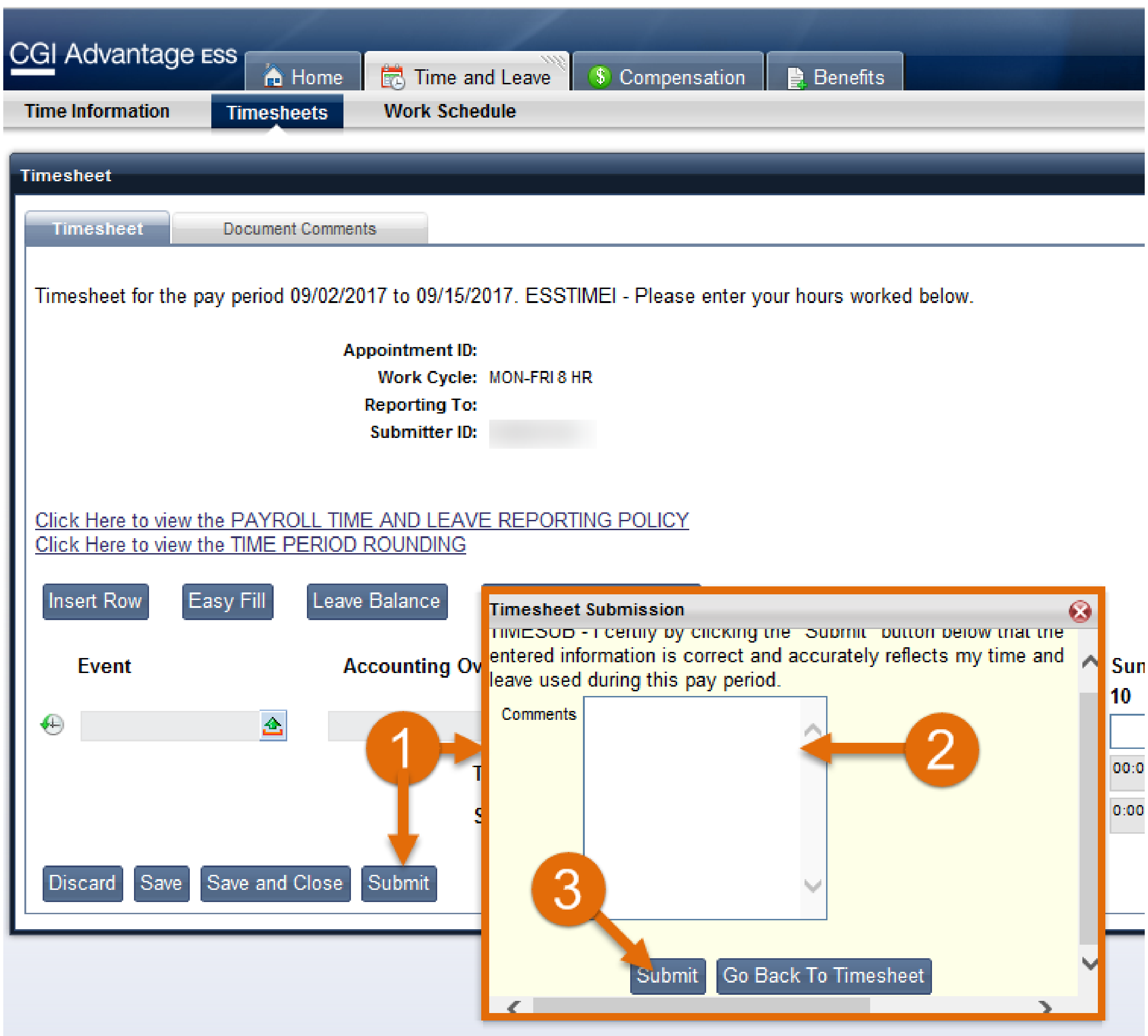
Interaction #7: Submit a Timesheet

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.

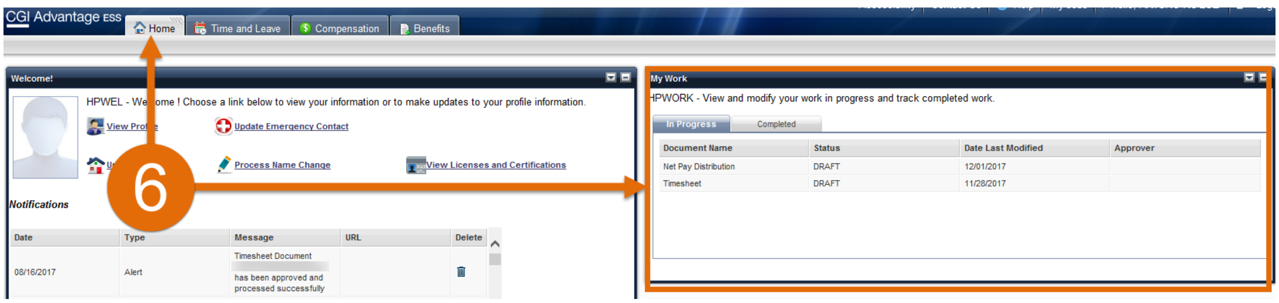
3. Click **Submit**. You will then receive a pop up message that allows you to enter any comments or finalize the submission process.



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 tiemsheet will be deleted. You will need to create a new timesheet for the pay period
- **Save** – Saves the data and allows you to conitnue 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

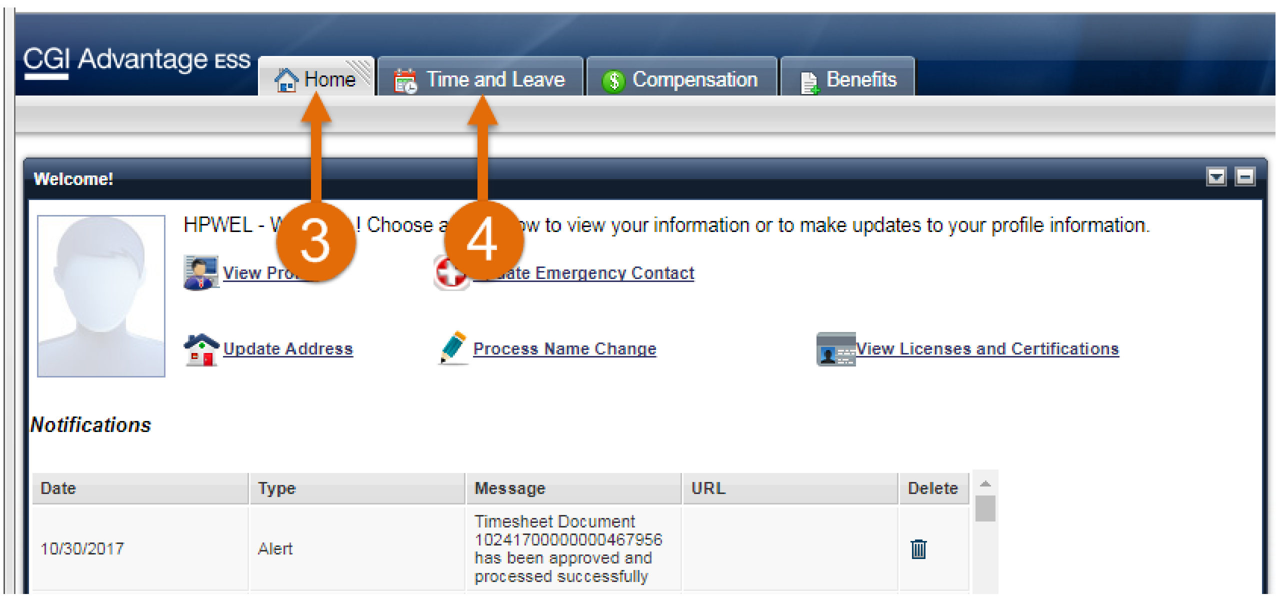
Interaction #1: Timesheet Submittal for an *Exception* Employee

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***)

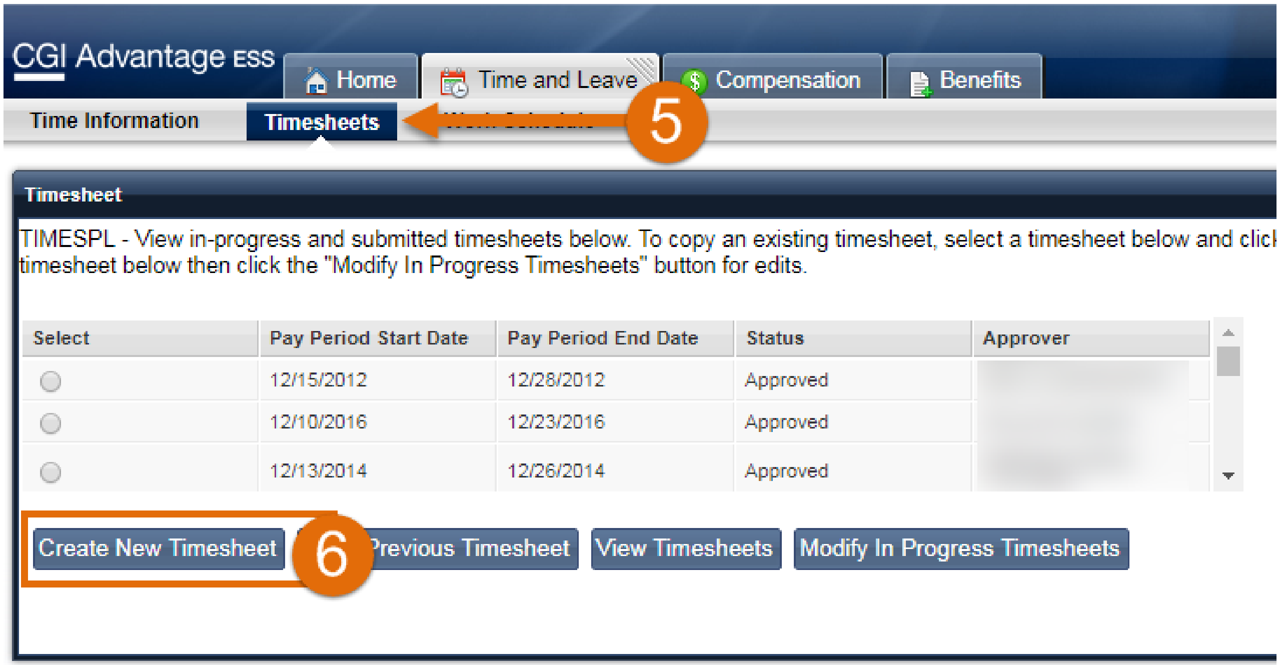
- Timesheets for exempt employees are exception-based. This means an exempt employee only enters the exceptions to his/her regular schedule into his/her timesheet (i.e., holiday time and leave time).
- Upon submission, a timesheet will electronically workflow to the employee's supervisor for approval 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.



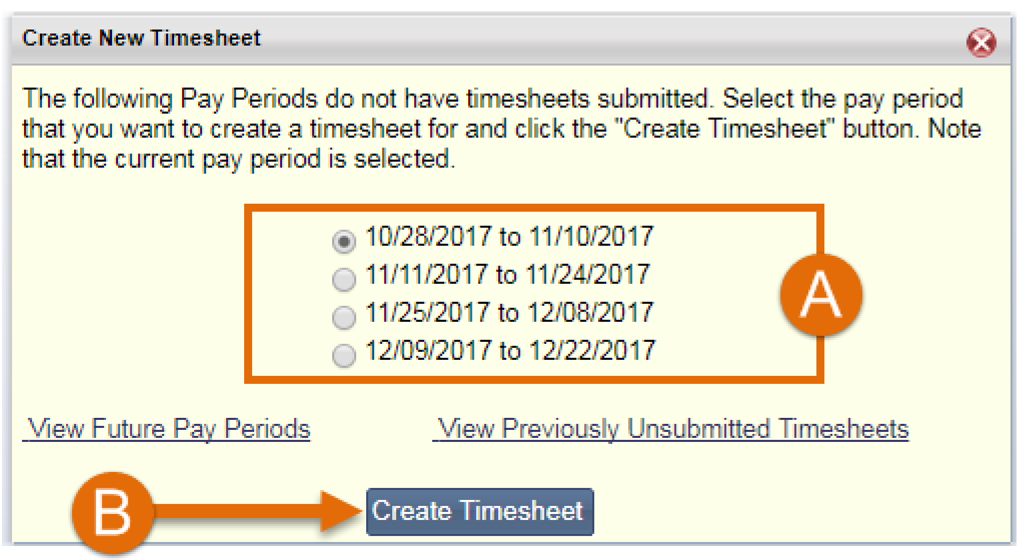
2. Click the **Timesheets** sub-tab.

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



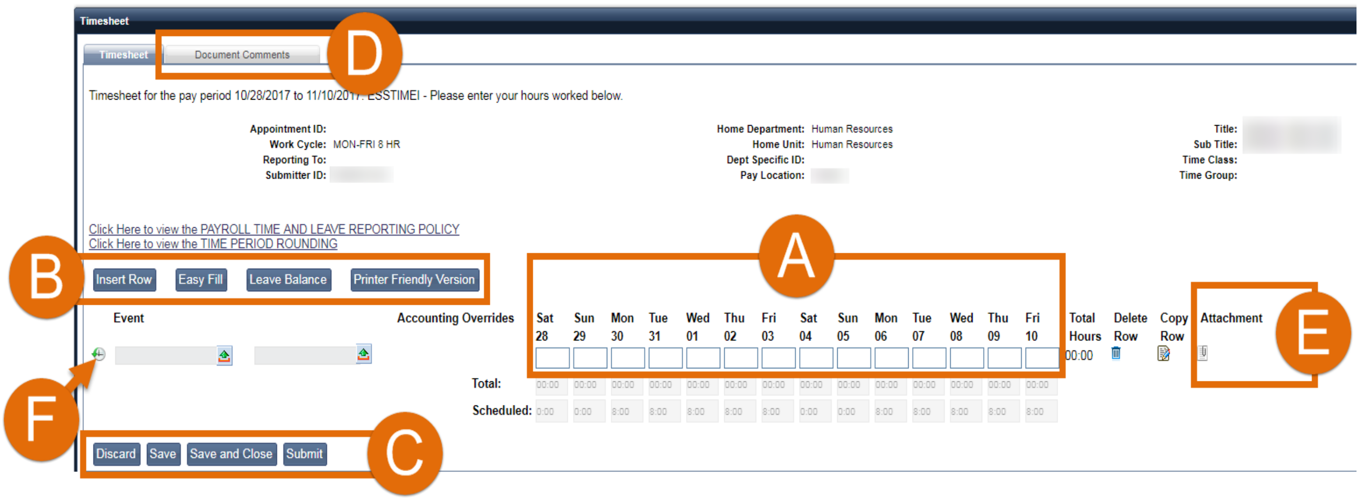
4. A new screen displaying pay period:

   A. Select the appropriate pay period.
   B. Click **Create Timesheet**.

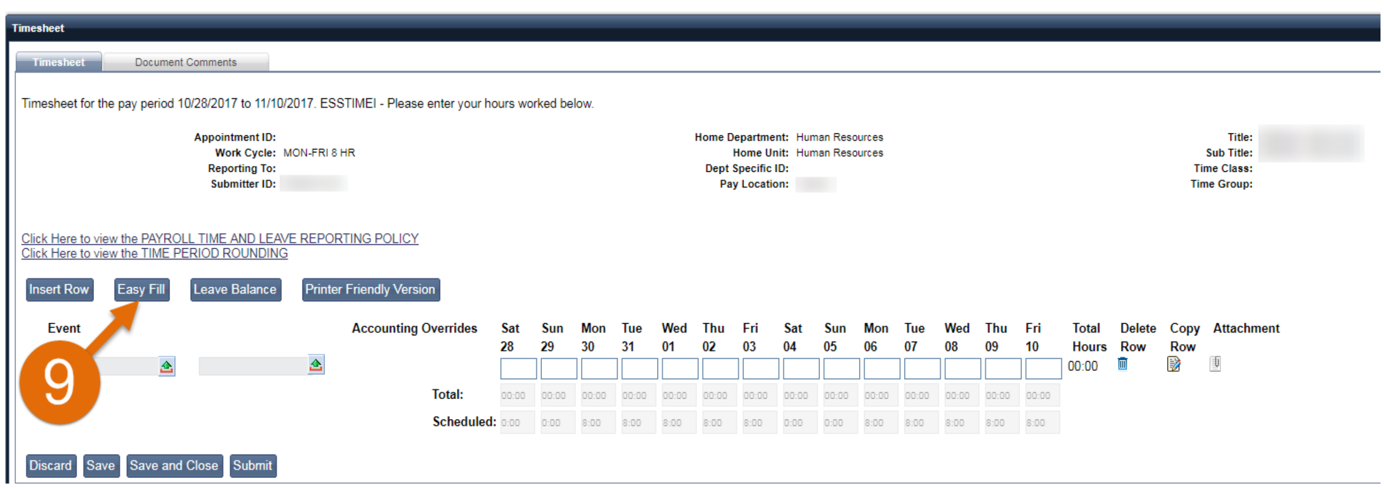


5. New Features:

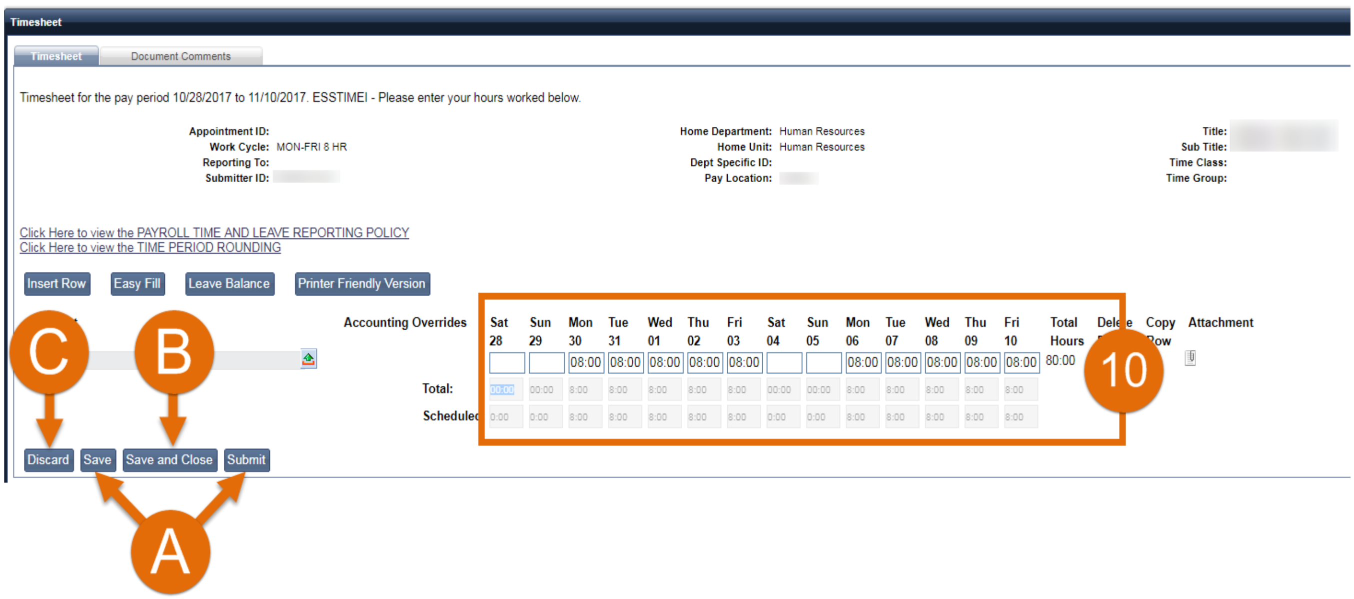
   A. Your timesheet for the entire pay period is on *one* page.
   B. The **Insert Row**, **Easy Fill**, **Leave Balance**, and **Printer Friendly Version** links are in a *new* location.
   C. There are new features and options when completing your timesheet: **Discard**, **Save**, **Save and Close and 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.



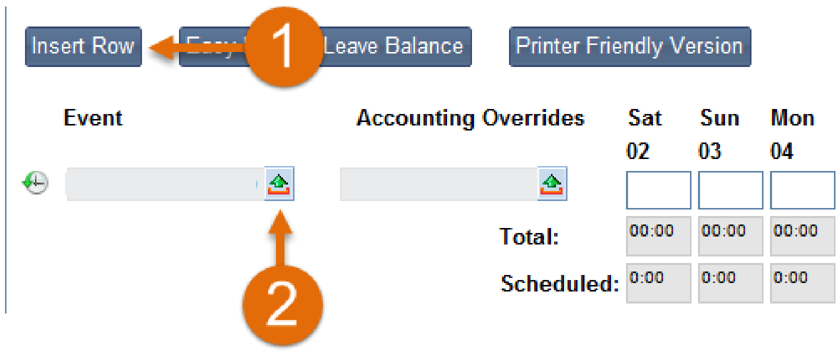
Interaction #2: Entering Leave

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.

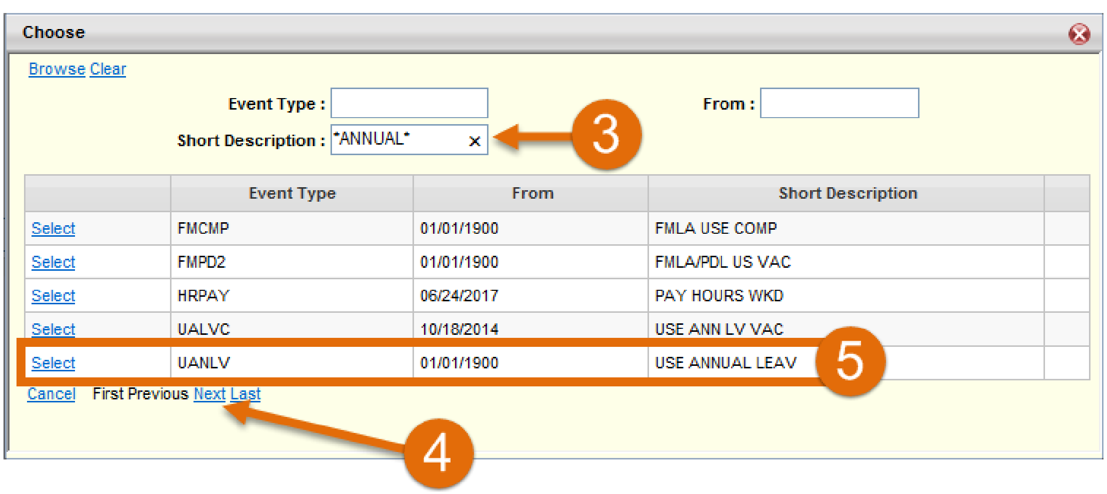
__Hint #1:__ If you are unsure of your current leave balances, click the __Leave Balance__ button in the upper-right corner of the Timesheet Details page.



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

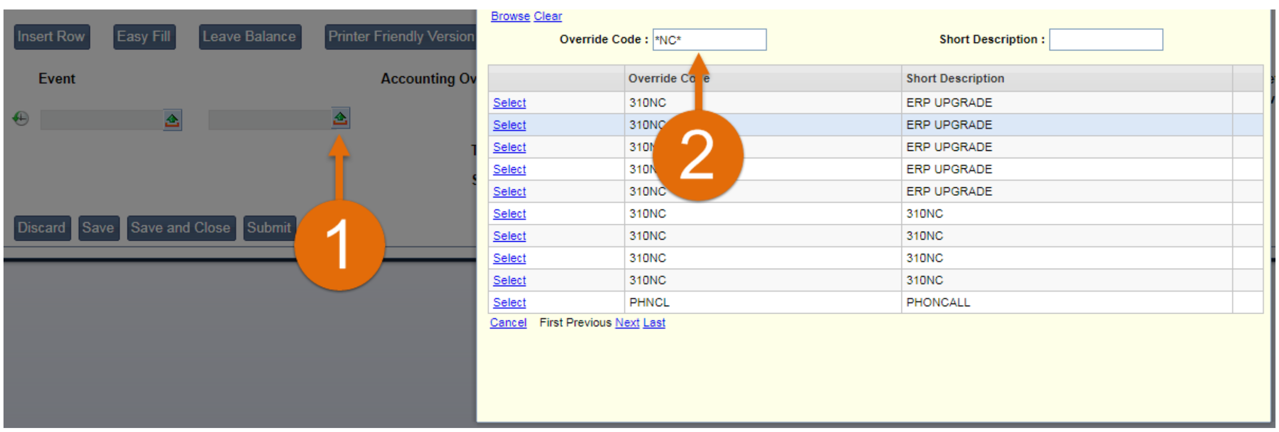
Description: For an employee to use override codes

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.*



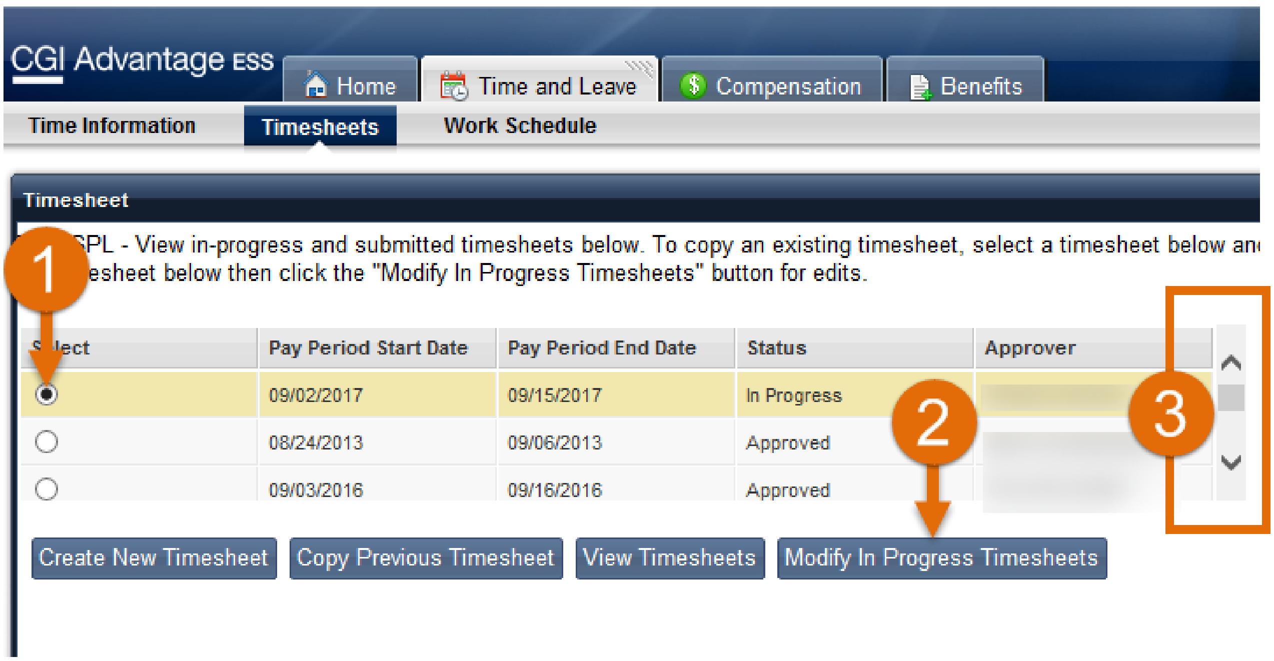
Interaction #4: Modify a Timesheet

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.



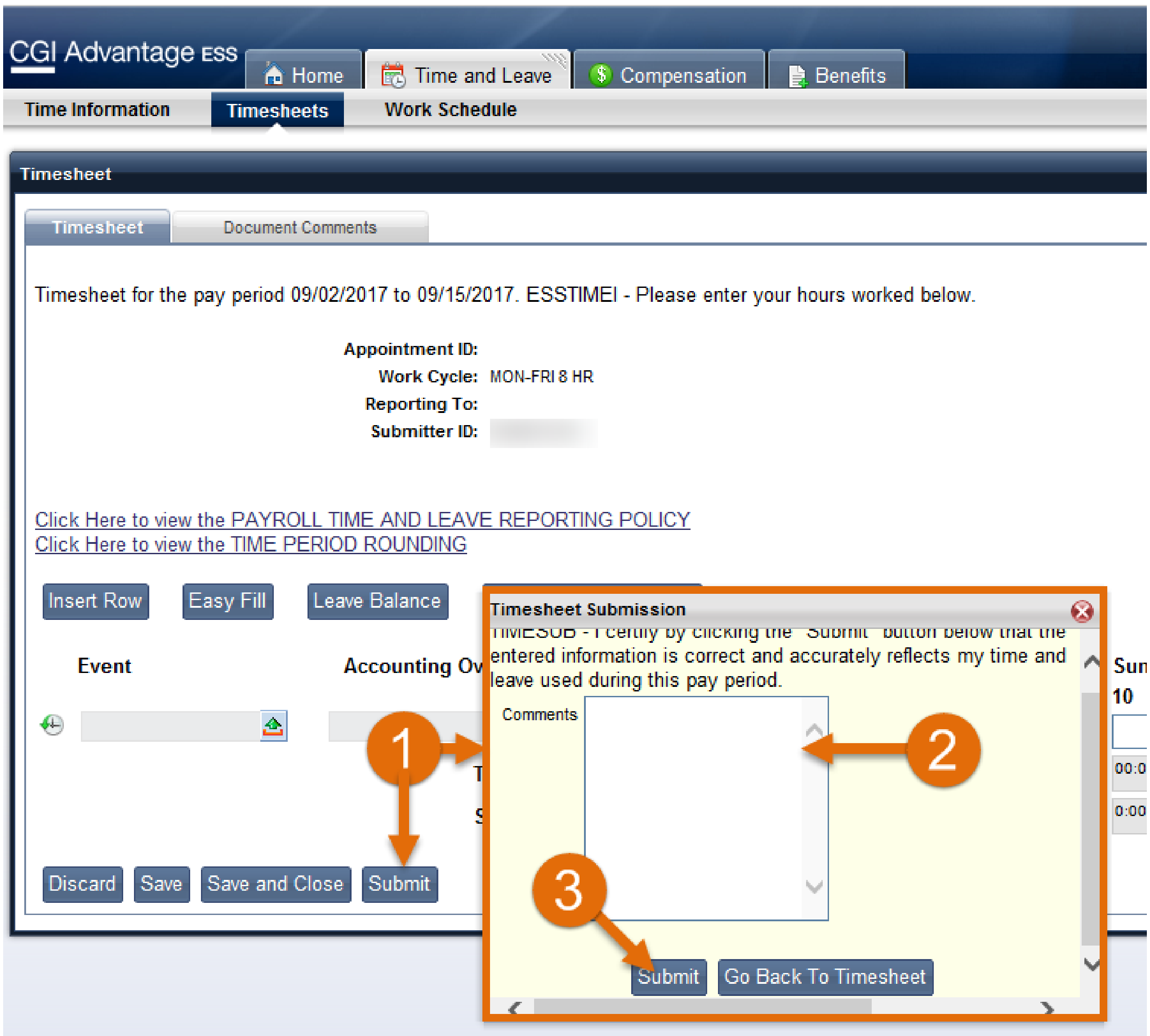
Interaction #5: Submit a Timesheet

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.

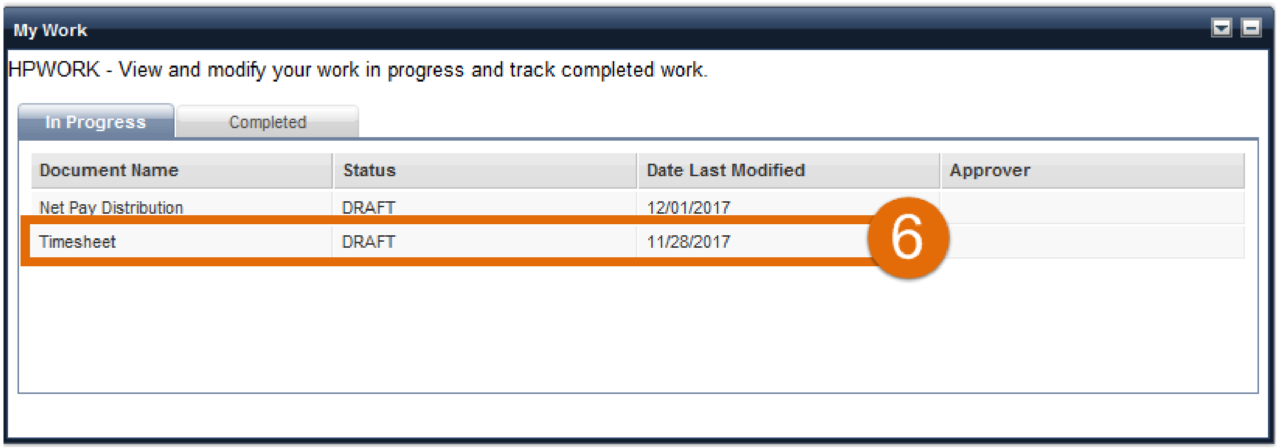
3. Click **Submit**.



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

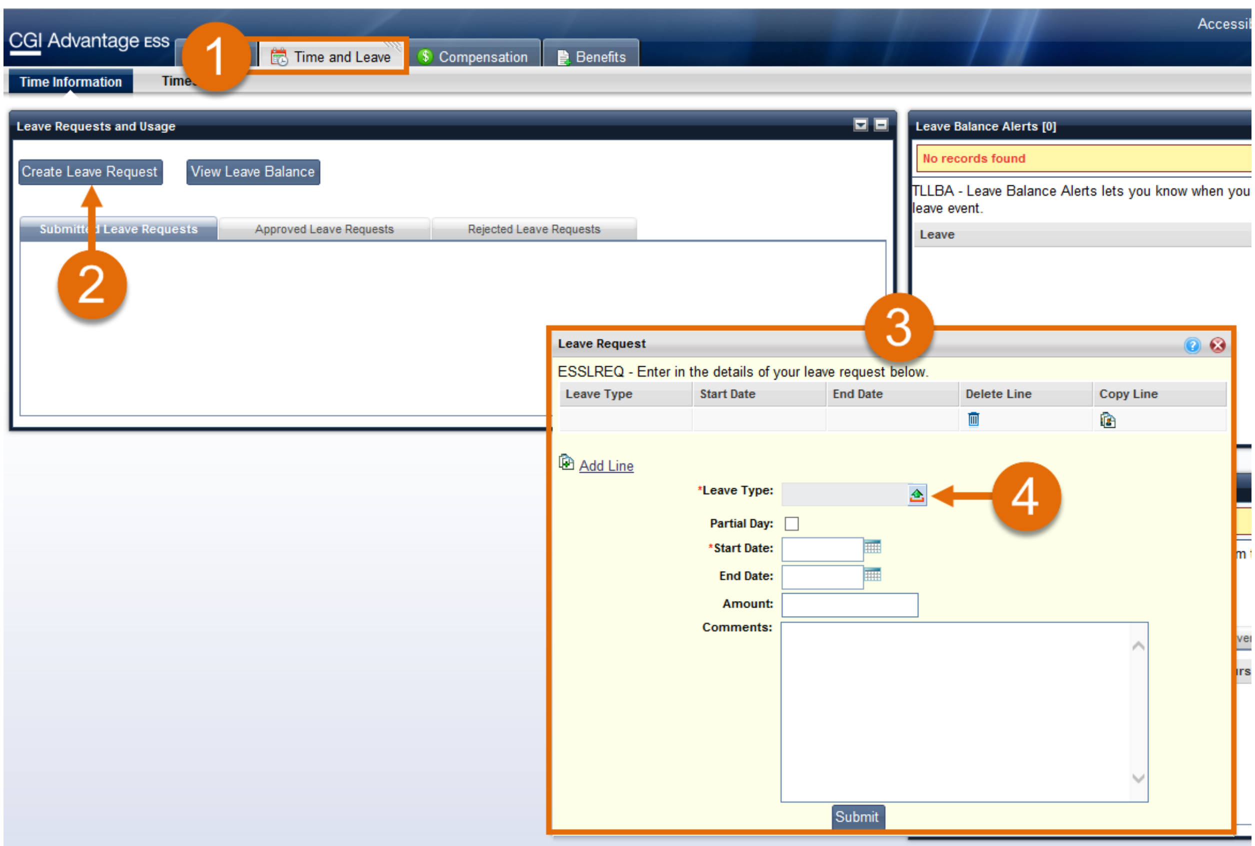
Description: For an employee to request leave

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

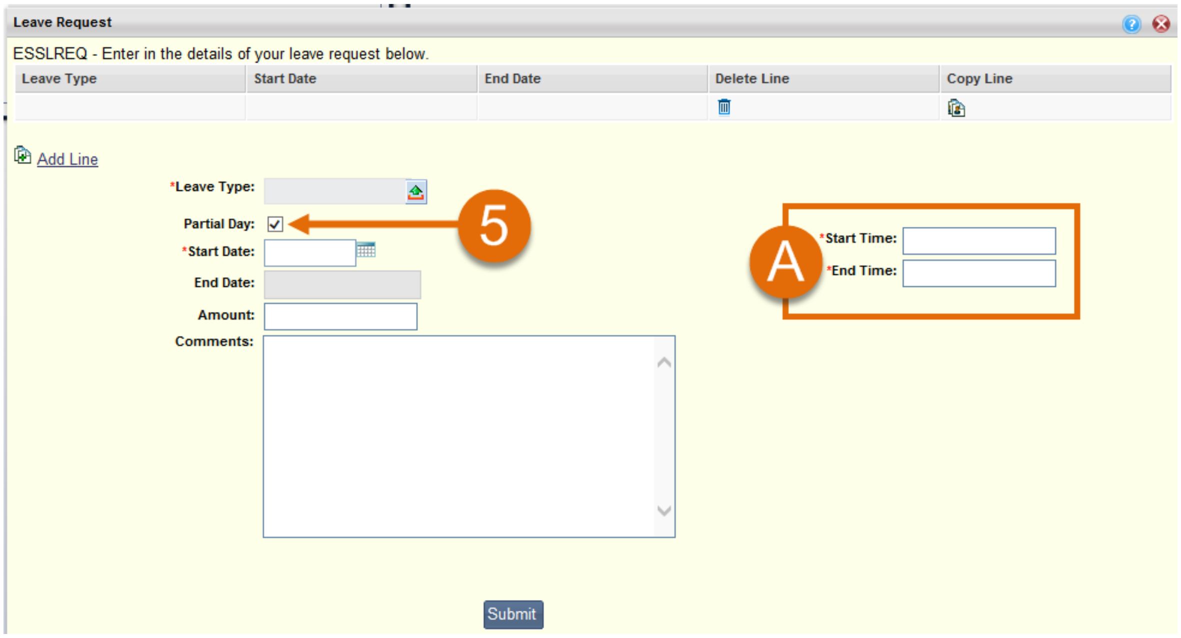
2. Within the **Leave Requests and Usage** widget, click the **Create Leave Request** button.

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

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

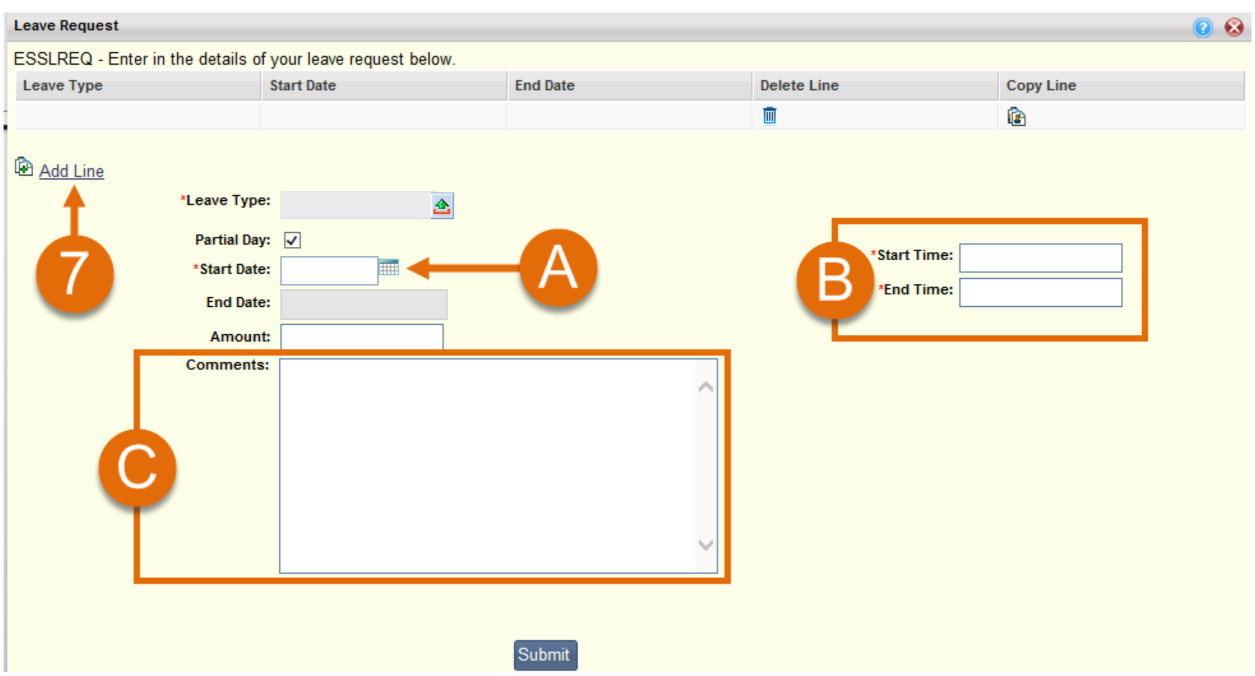


5. To request a partial day leave, click the **Partial Day** checkbox.
   A. Additional fields will appear



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

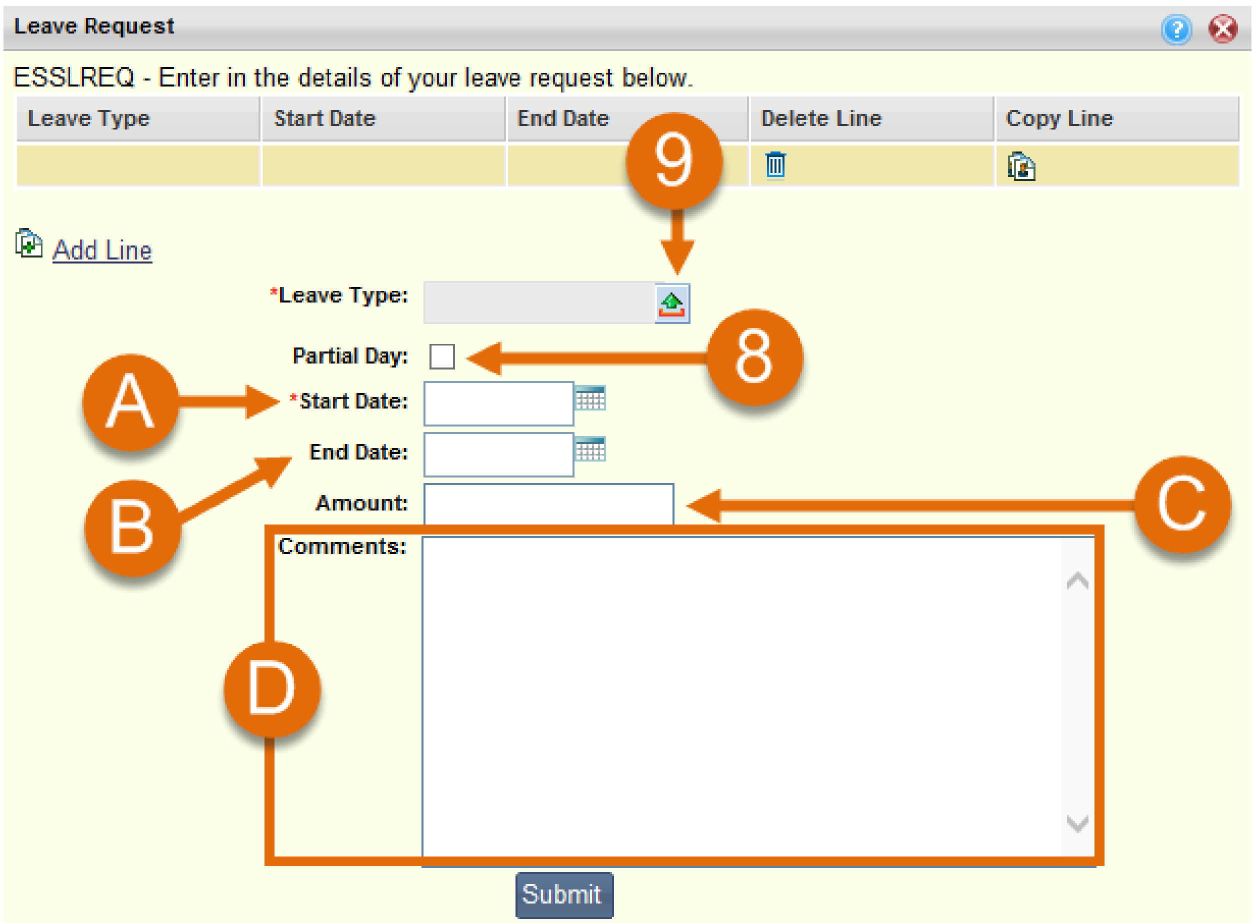
7. To add additional partial day requests, click **Add Line** and repeat steps 4-6.



8. To request a full day leave, keep **Partial Day** checkbox unchecked.

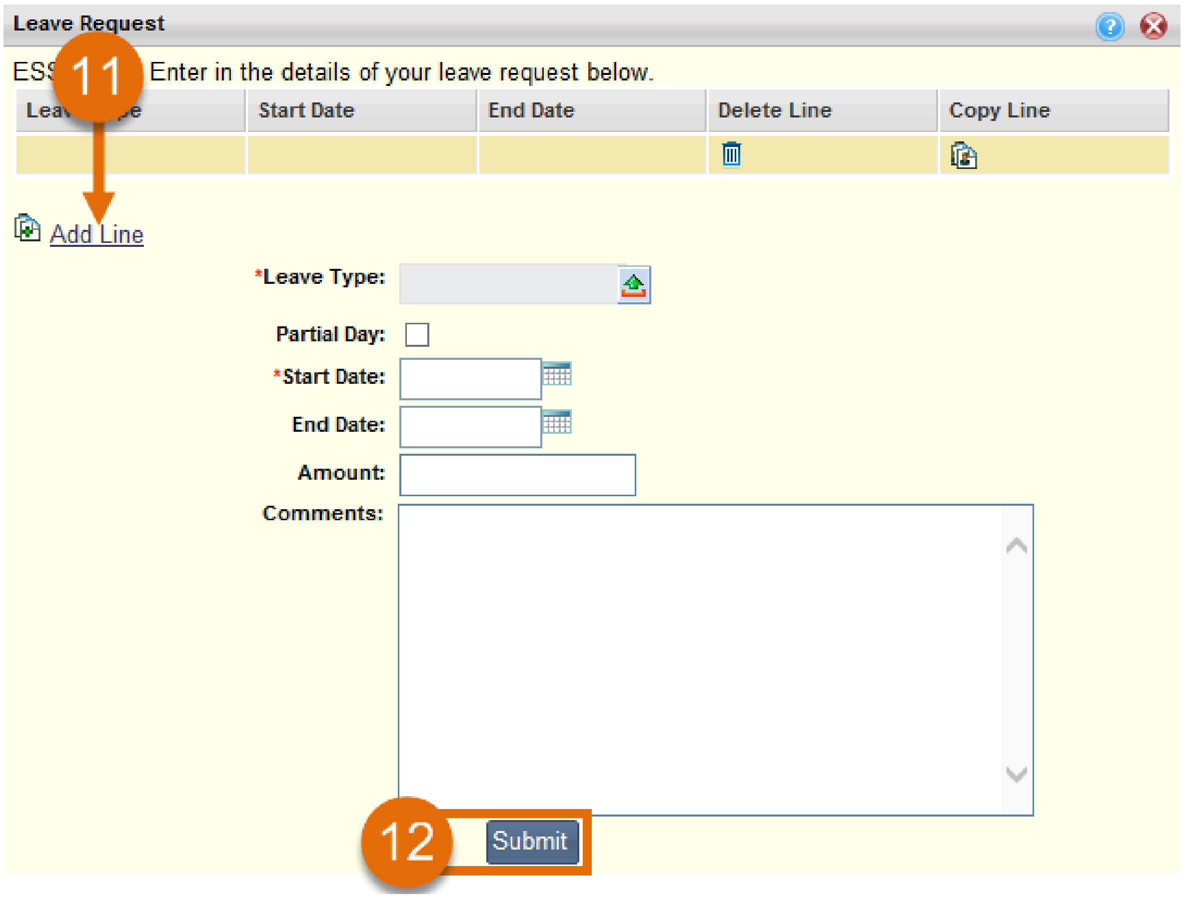
9. Use the pick list arrow **Leave Type** to select the applicable option.

10. Insert the following:
    A. **Start Date**
    B. **End Date**
    C. **Amount** (In hours)
    D. Under **Comments**, insert comments pertaining to this transaction.

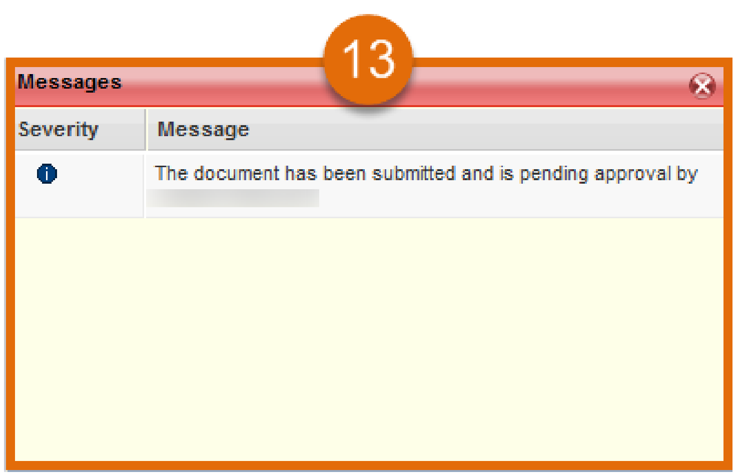


11. To add additional full day requests, click **Add Line** and repeat steps 8-10.

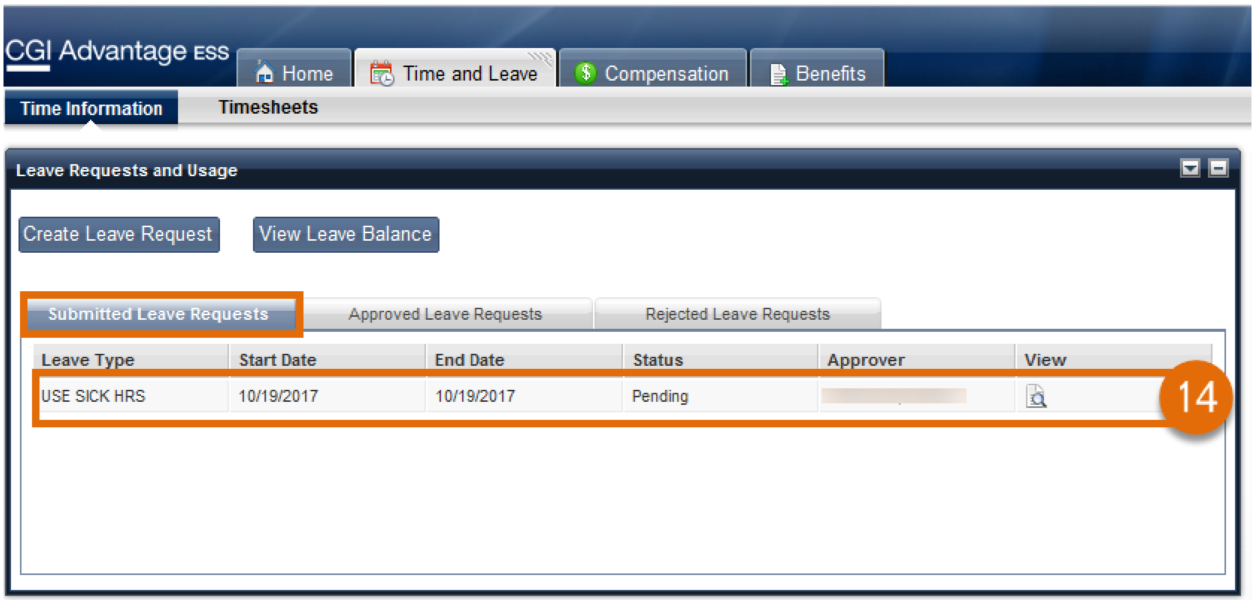
12. Click **Submit**.



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.

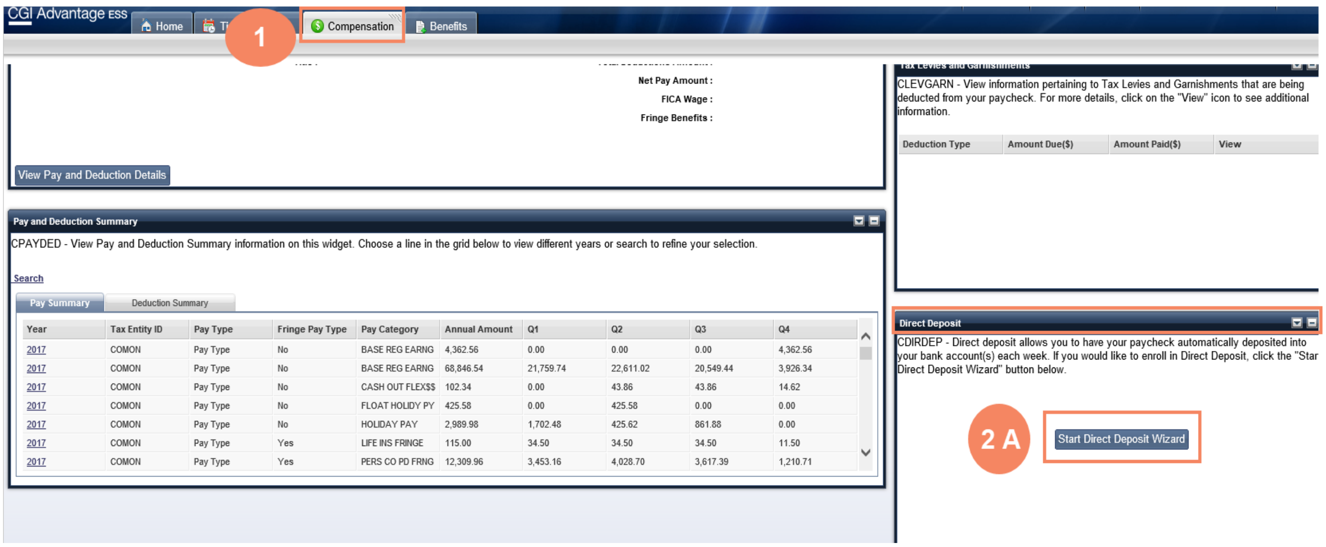


Direct Deposit

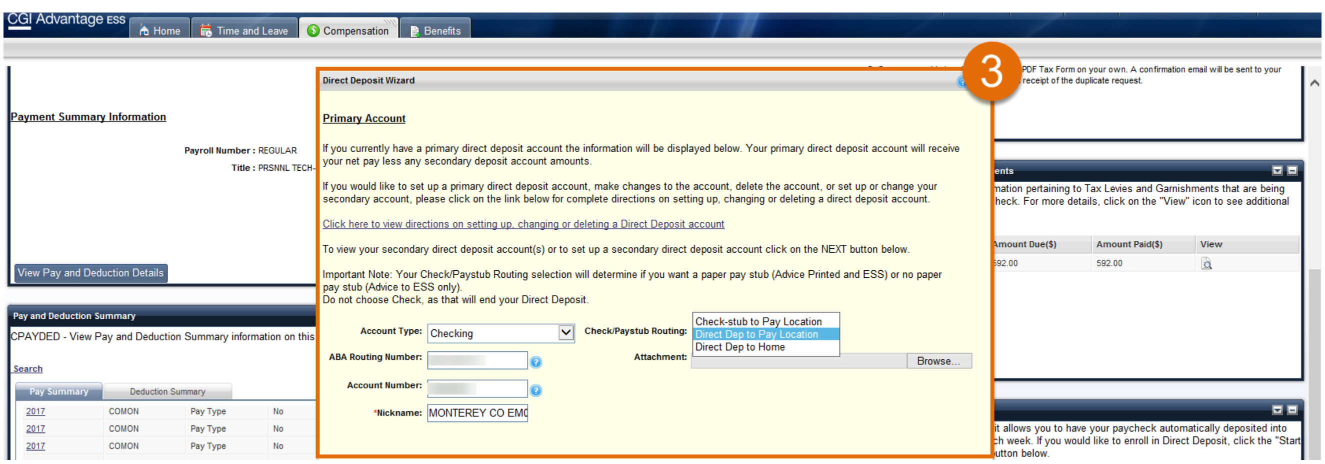
Interaction #1: Primary Direct Deposit Account

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.

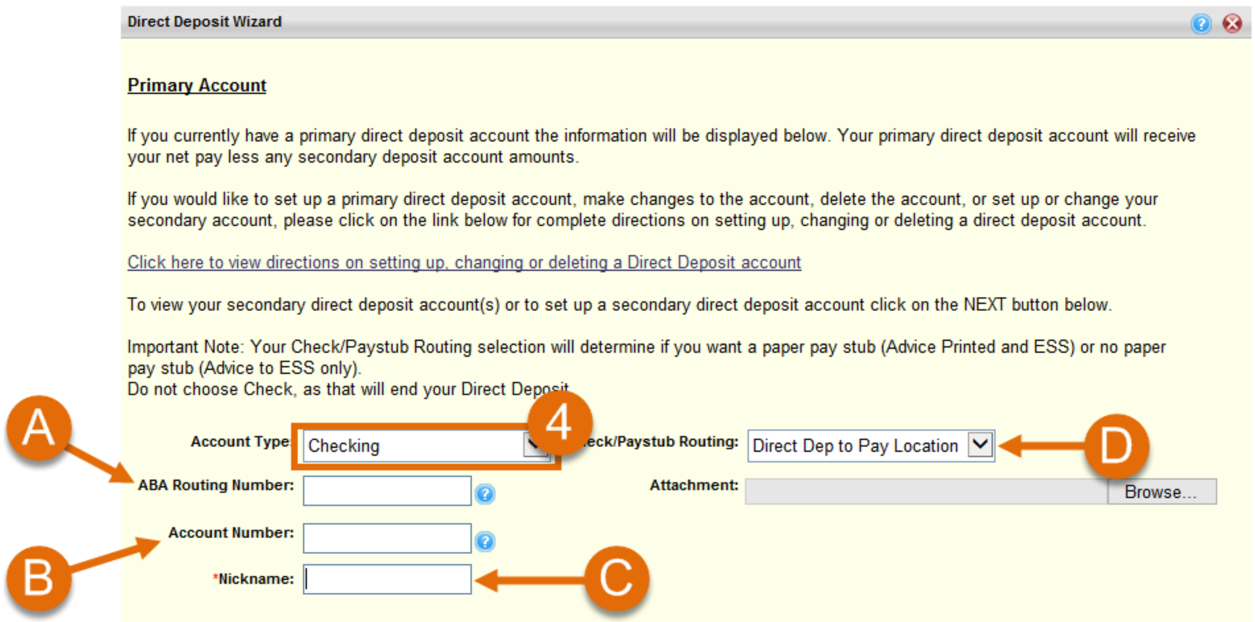


3. Navigate to **Direct Deposit** widget.

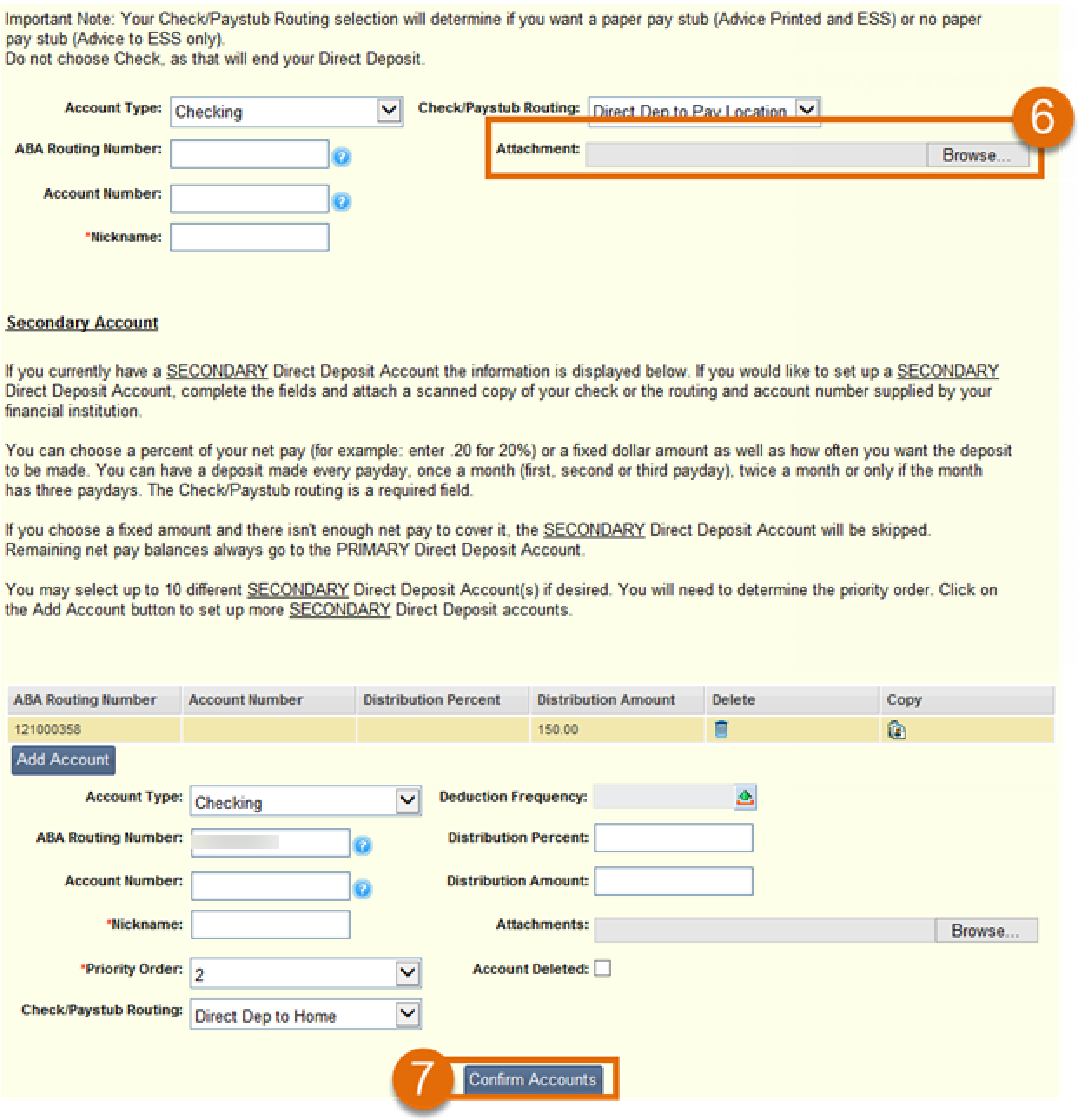


4. Select the account type by using the drop-down menu for **Account Type**.
5. Input the following fields:

C. 9 digit **ABA Routing Number**
D. **Account Number**
E. **Nickname**
F. Use drop-down menu for **Check/Paystub Routing**



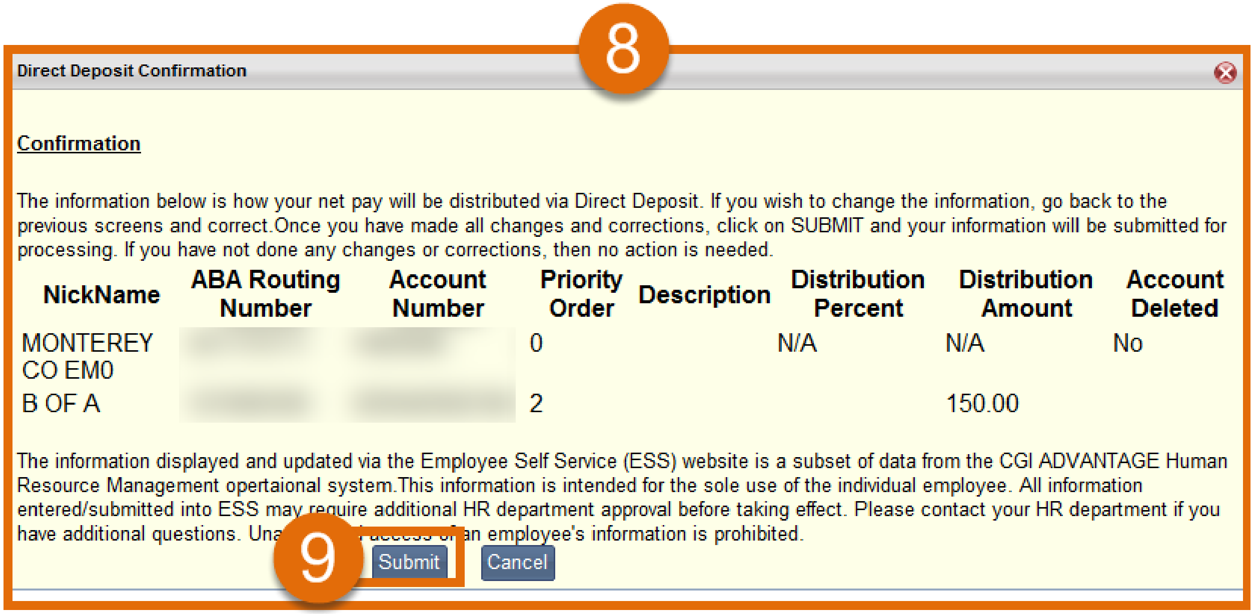
6. Under **Attachments**, click **Browse** to upload a PDF copy of a cancelled check from a banking institution.
7. Review and click the **Confirm Accounts** button.



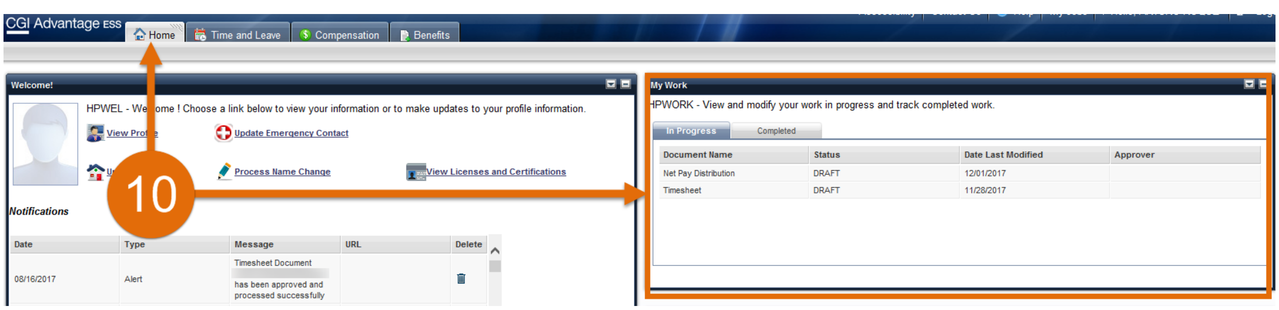
8. The **Direct Deposit Confirmation** window will appear.

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.



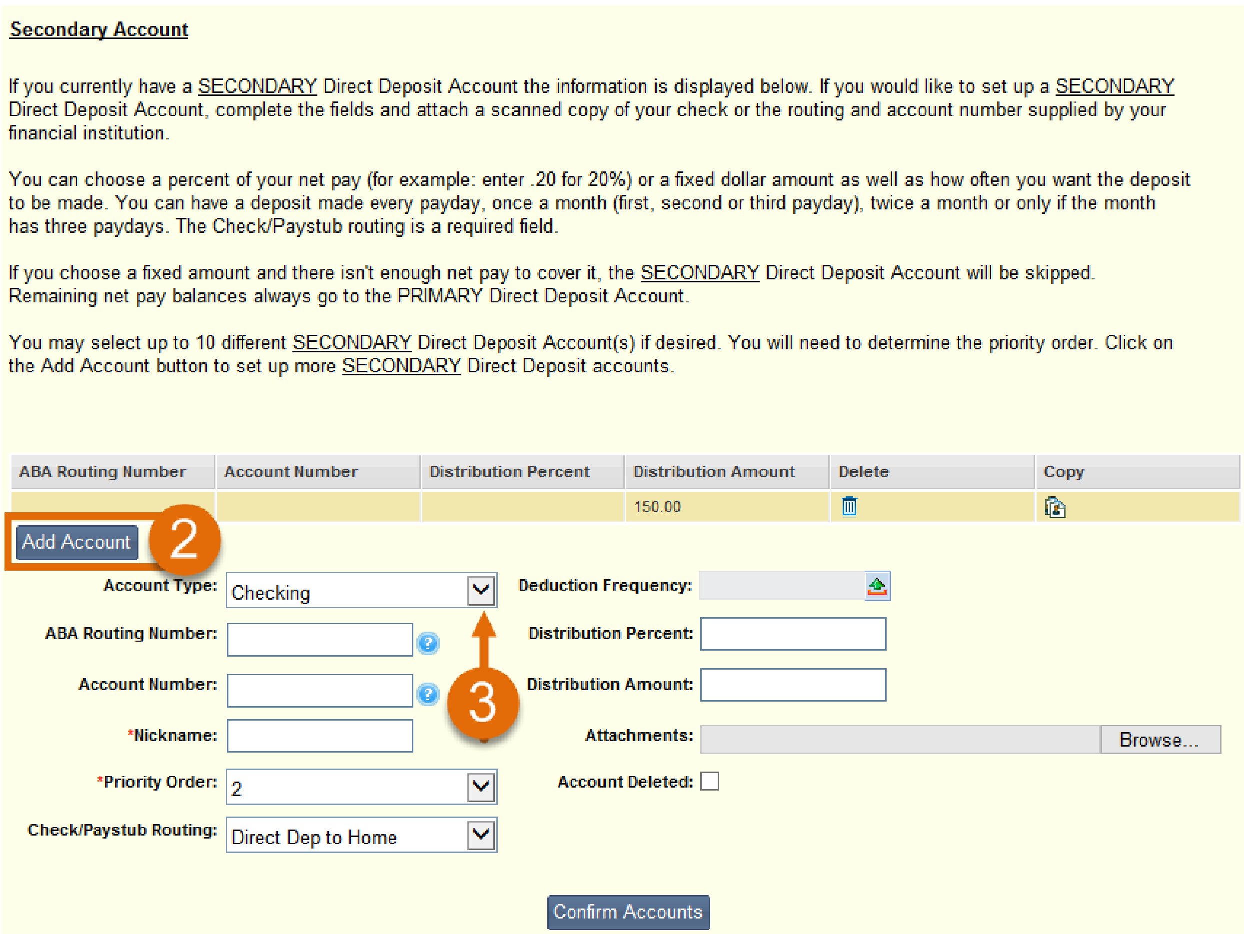
Interaction #2: Secondary Direct Deposit Account

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**

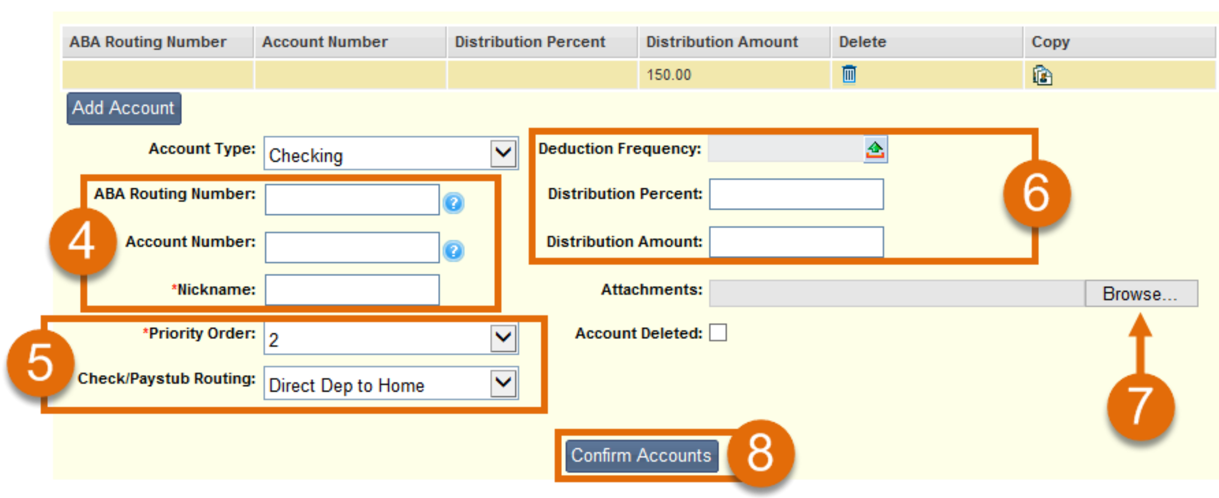
5. Use the drop-down menu for both **Priority Order** and **Check/Paystub Routing**.

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.

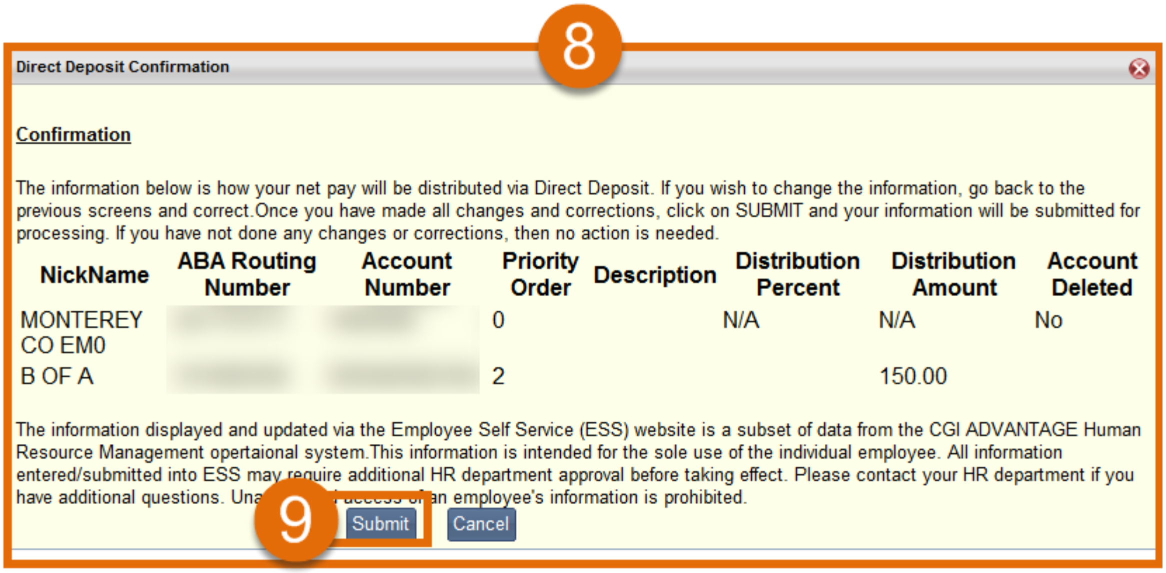
   Note: *If additional accounts need to be created, click* ***Add Accounts*** *and repeat steps 3-7.*

8. If no additional accounts are needed, select **Confirm Accounts** and the **Direct Deposit Confirmation** window will appear.

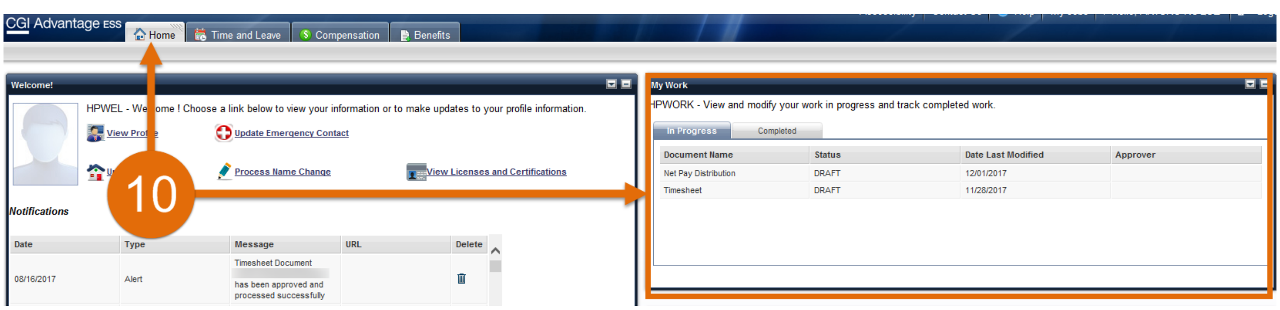


9. Review/ confirm all information and click **Submit**.

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



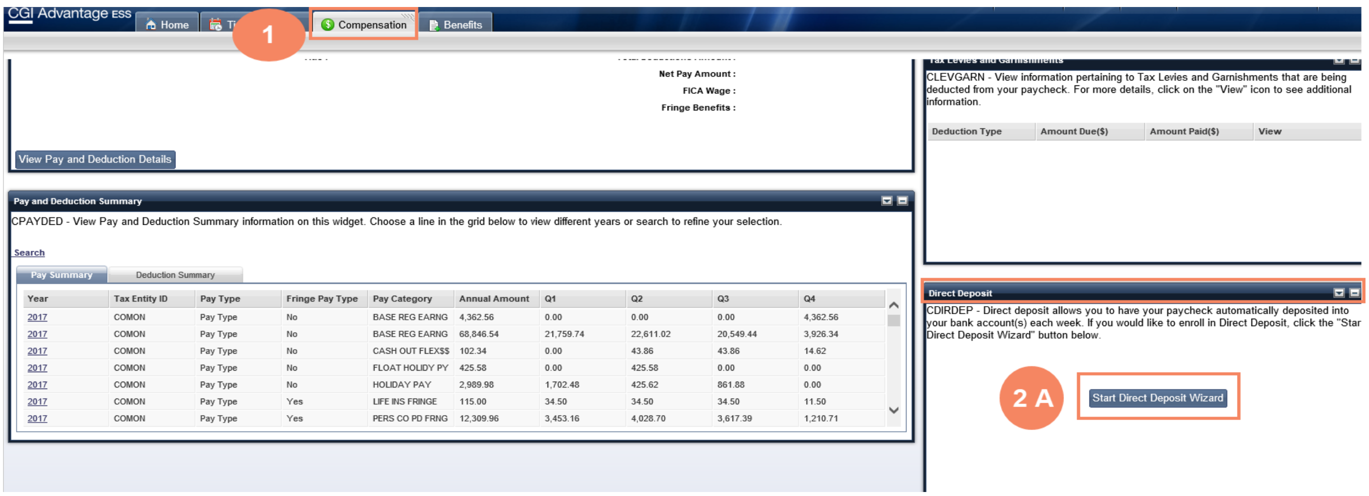
10. Employee can view the status of their document by clicking on the **Home** tab and locating the Net Pay Distribution document in their **My Work** widget.



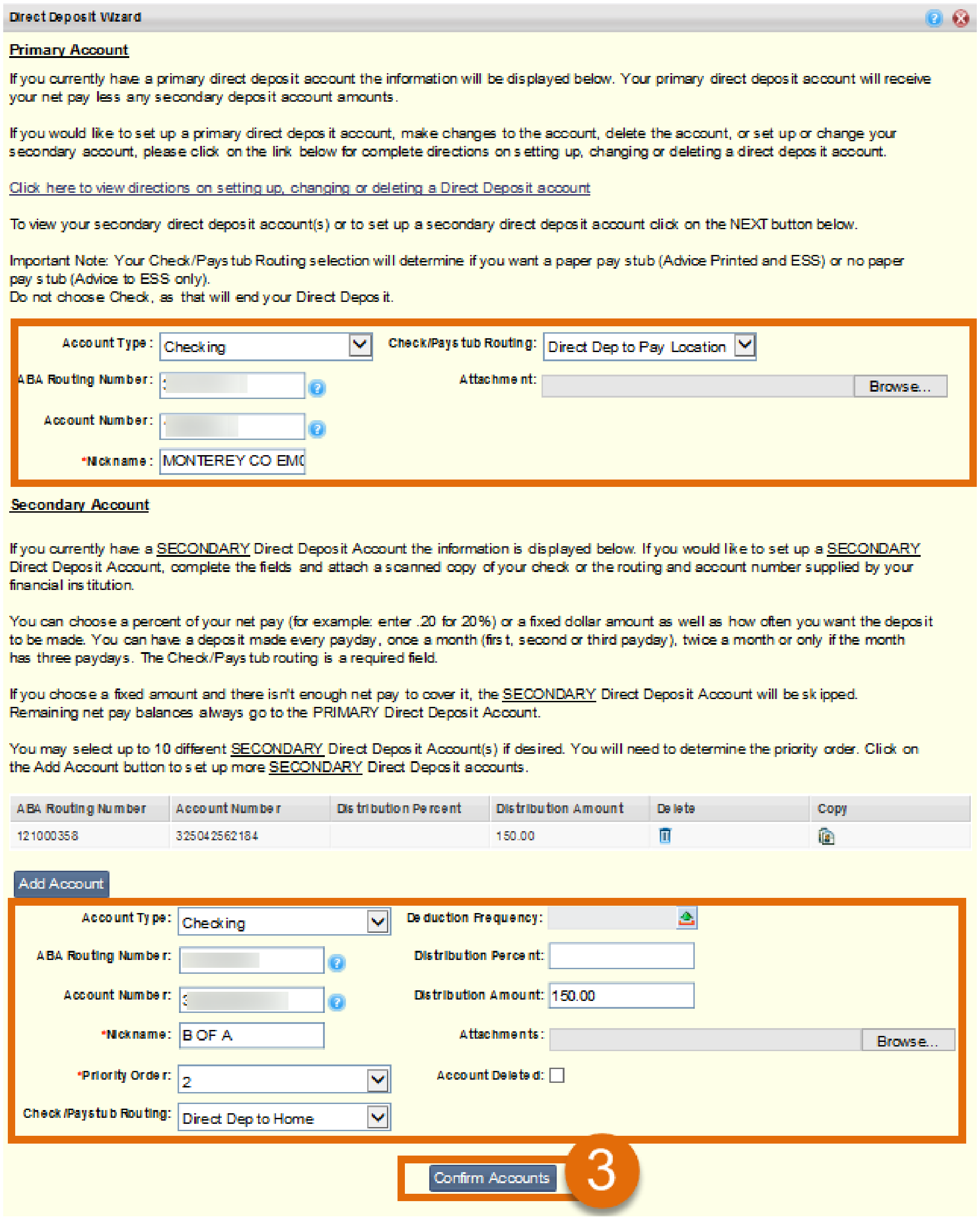
Interaction #3: Modify Account Information

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.



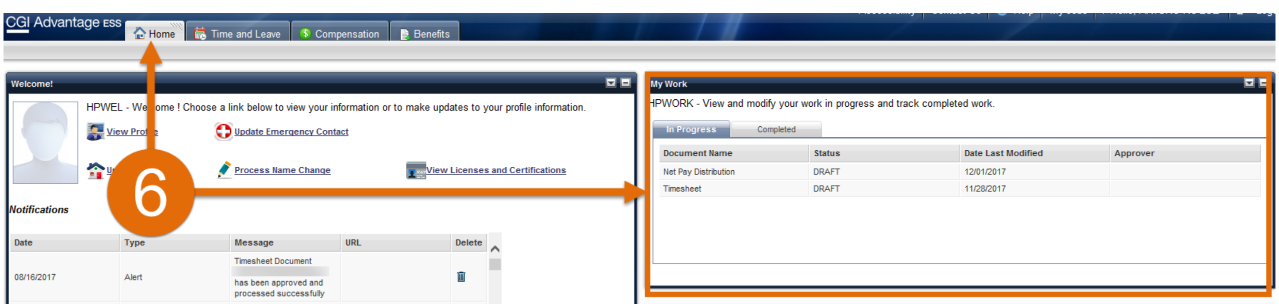
3. Make the necessary modifications. Review and click Confirm Accounts.



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.

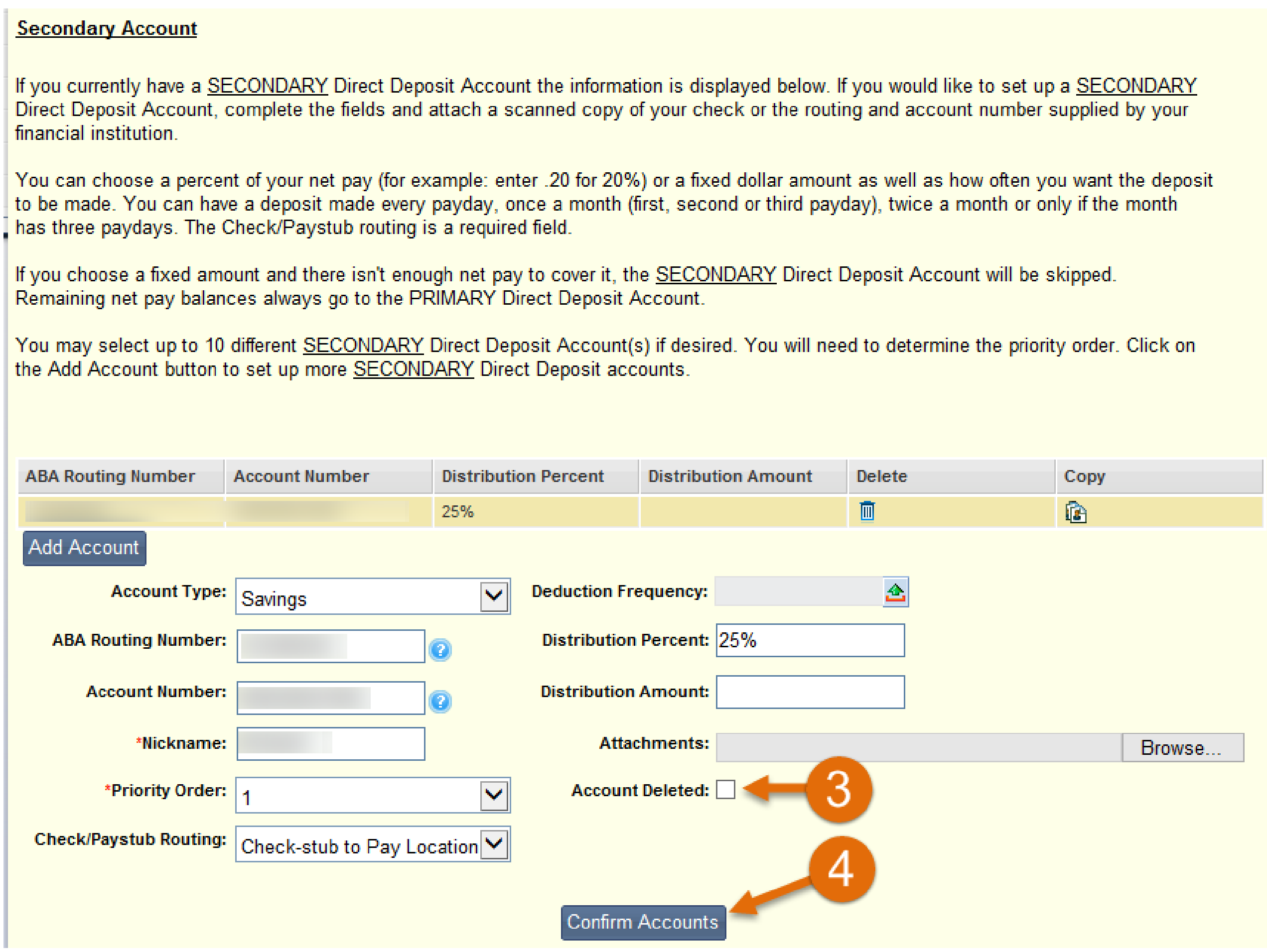
A. Closing Your Secondary Account

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**.



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.

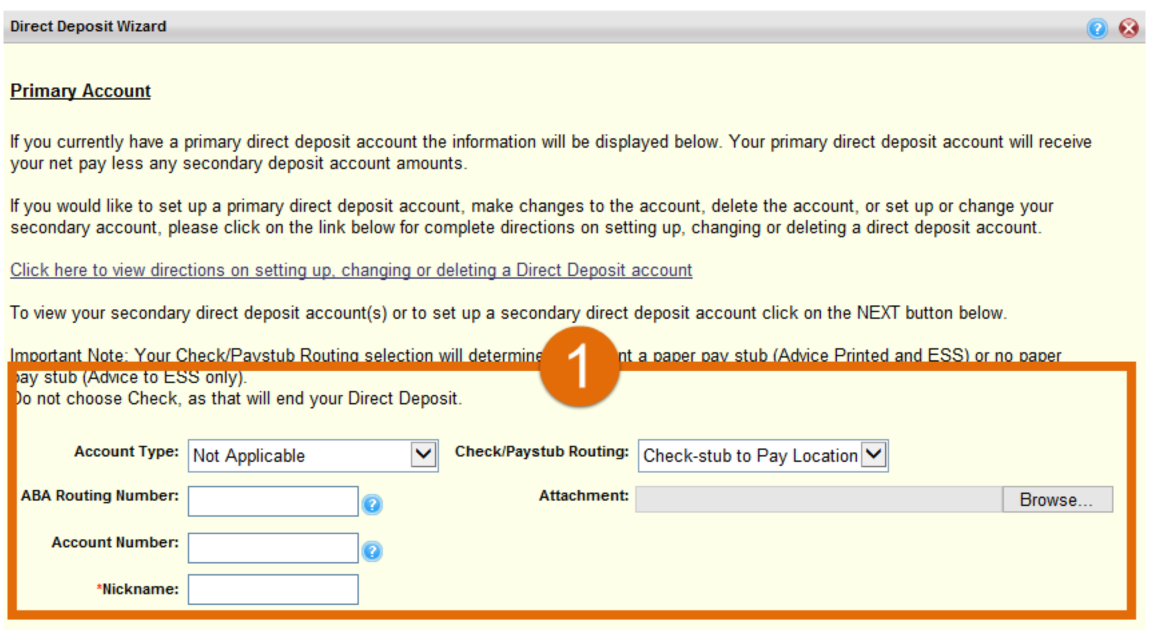
7. Once submiited, your request will need to be approved by the Auditor-Controller's Office. If you have a County-issued email account (Outlook), you will receive a confirmation email upon approval.

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 Depsit Wizard** (Primary Account screen), set the account's properties to:

Field	Set to…
Account Type	"Not Applicable"
ABA Routing Number	Delete (blank)
Account Number	Delete (blank)
Nickname	Delete (blank)
Check/Paystub Routing	"Check-stub to Pay Location"



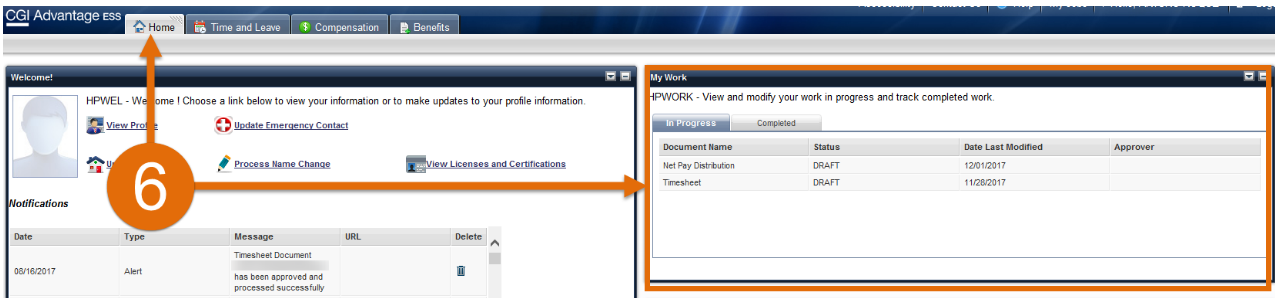
2. Click the **Confirm Accounts** button.

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

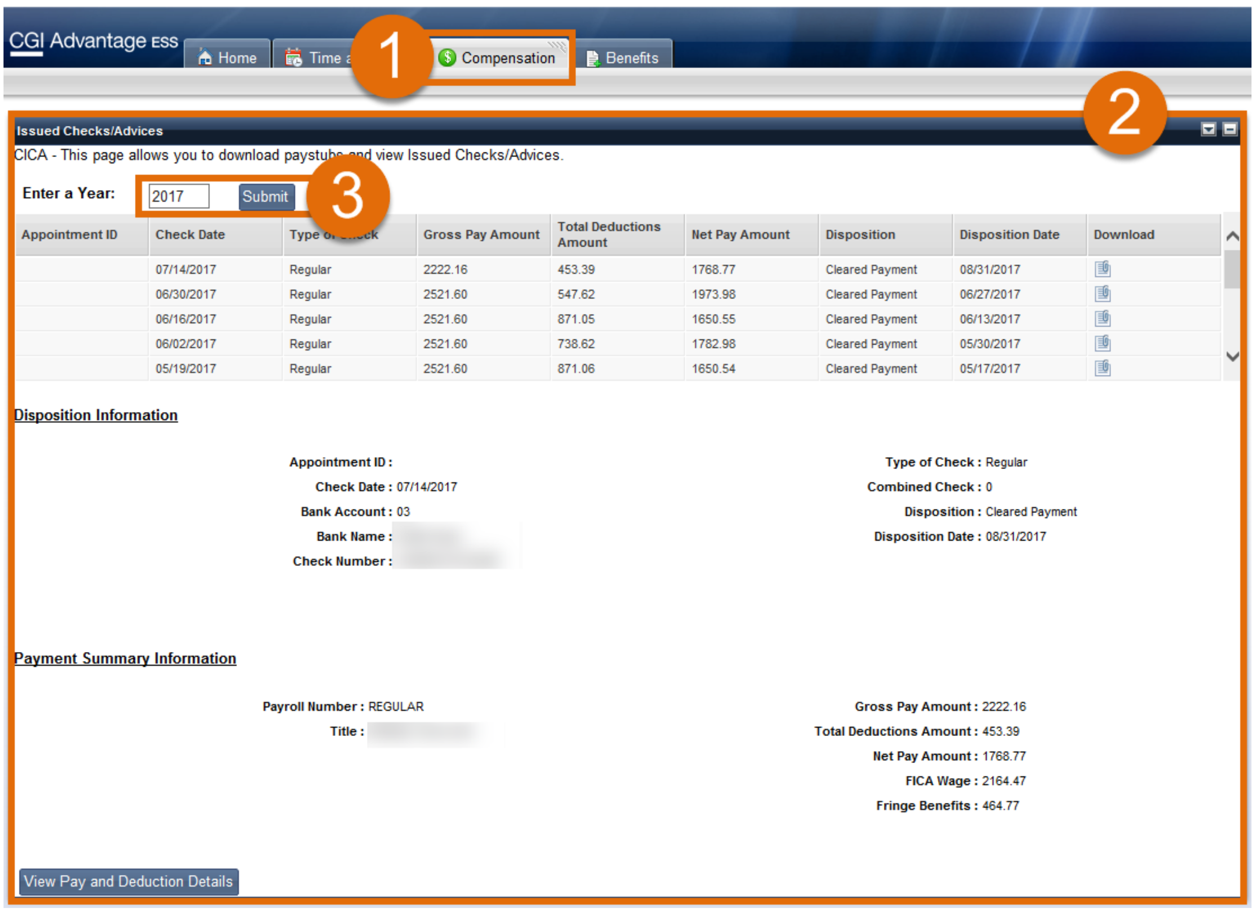
Interaction #1: To View Pay Stubs or Direct Deposit Advice.

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

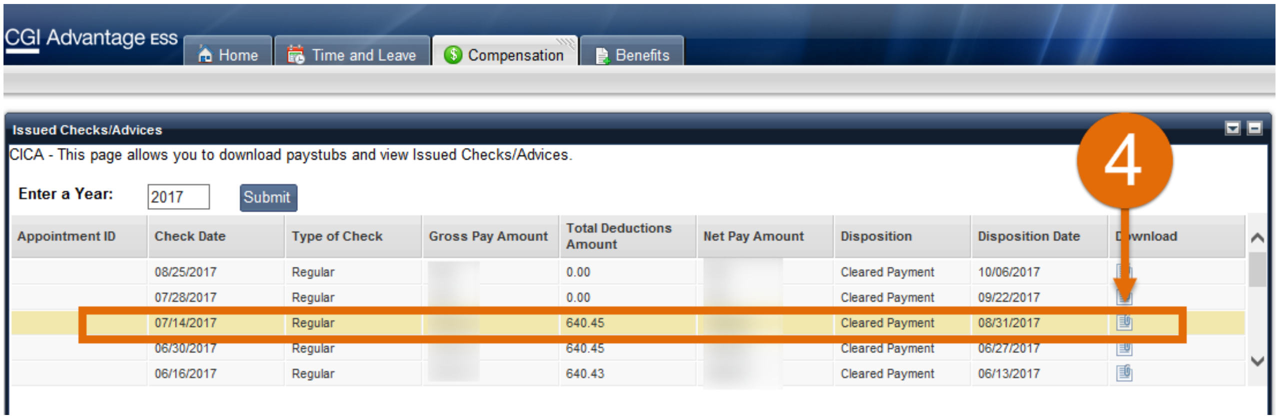
1. Select the **Compensation** tab, located on the top navigation menu.

2. Navigate to the **Issued Checks/Advices** widget.

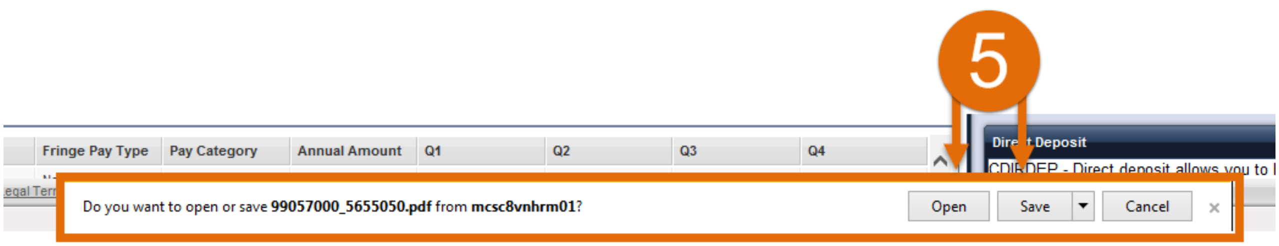
3. To filter, enter the year of the check in the field next to **Enter a Year** and click **Submit.**



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**.



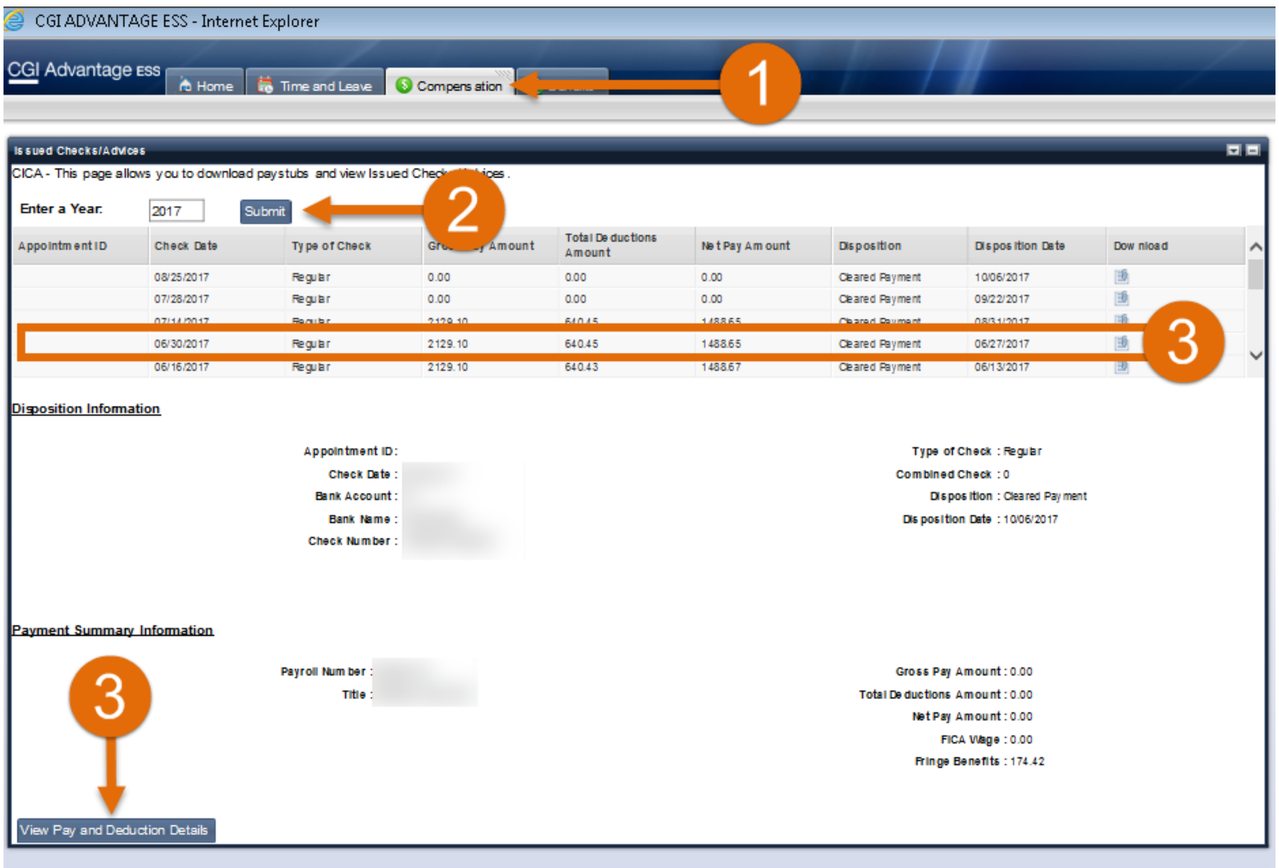
6. The direct deposit advice/ paystub will open for the employee can review and/or print.

Pay and Deduction Details and Summary

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

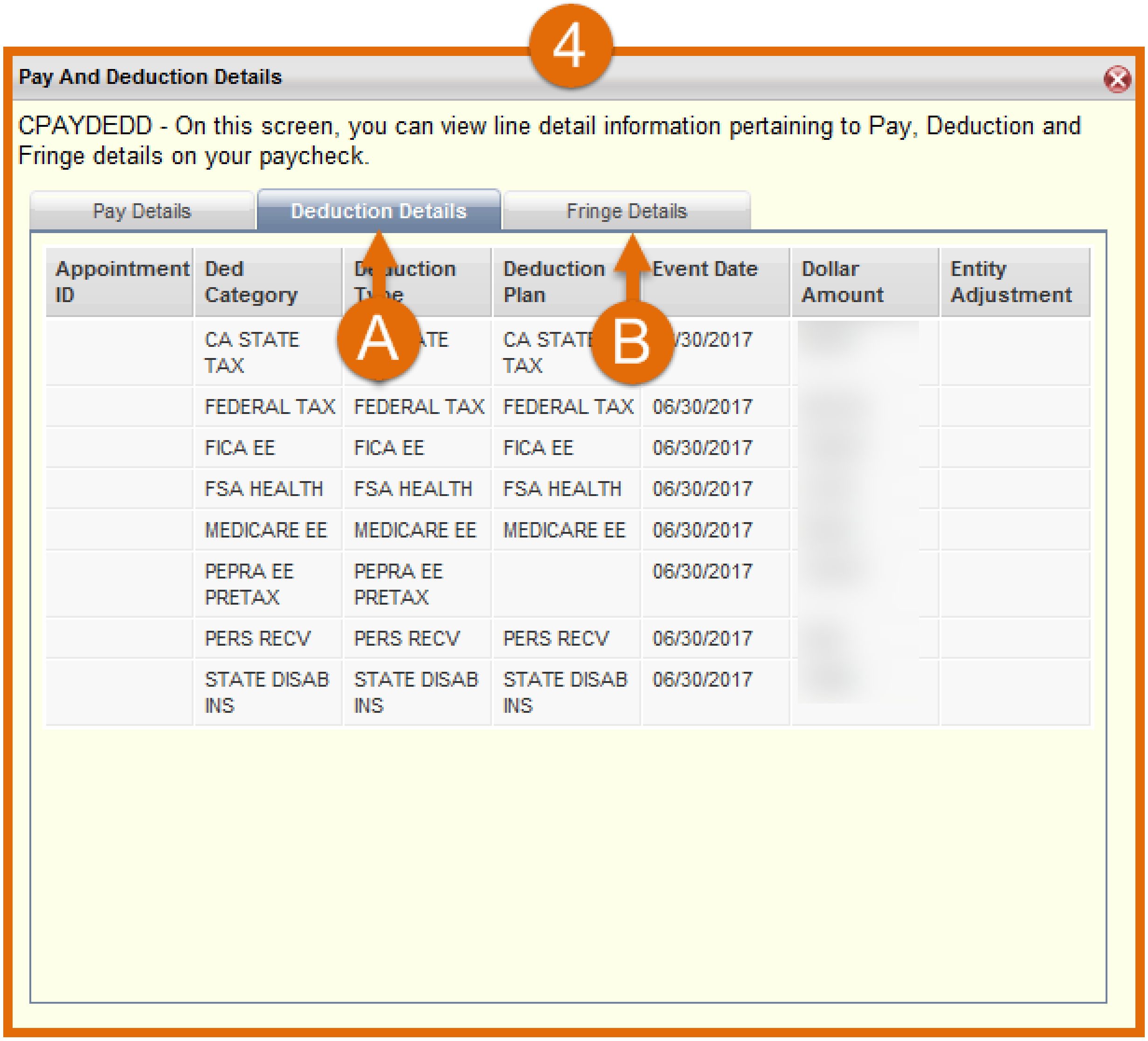
2. On the **Issued Checks/Advices** widget, enter a specified year under **Enter a Year** field.

3. Select a check date and click **View Pay and Deduction Details** to view the pay and deduction summary.



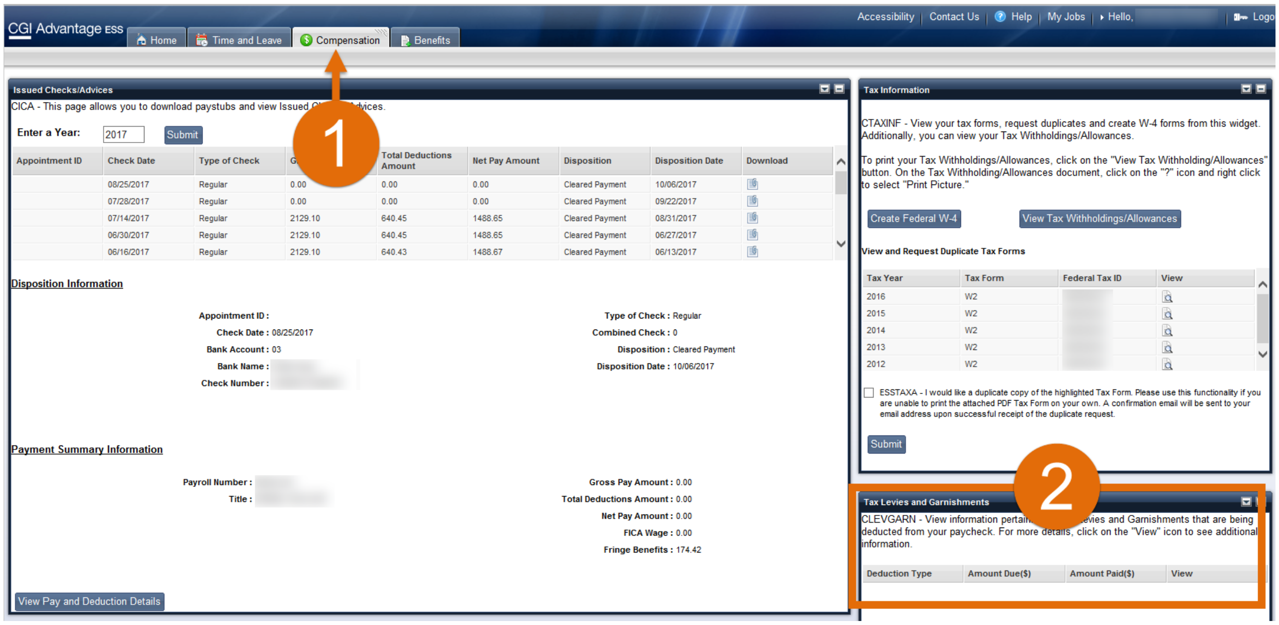
4. The **Pay and Deduction Details** window will appear, where you'll be able to view the following:

    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

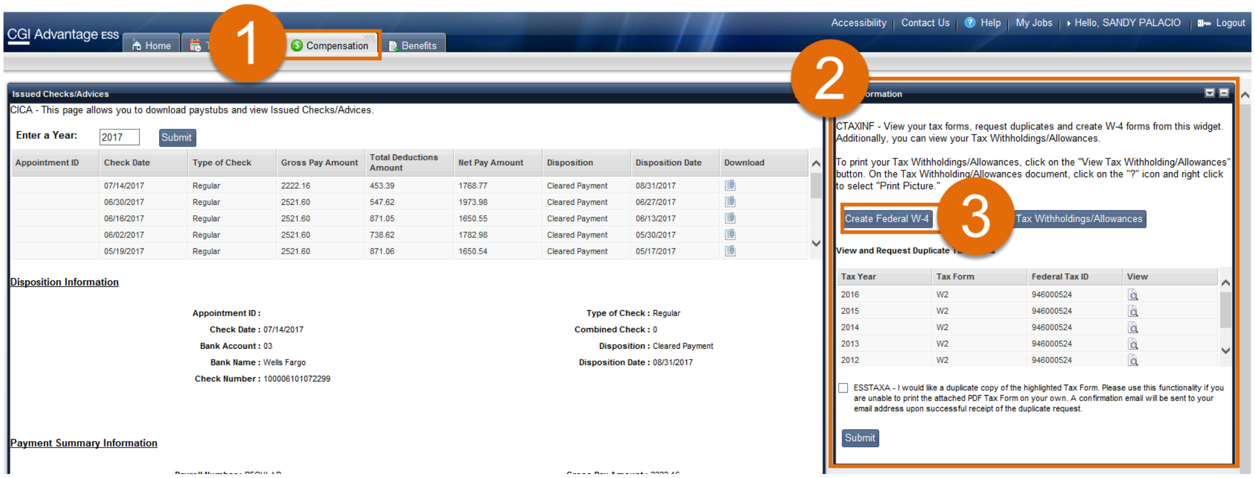
Interaction #1: To create Form W-4 Employee's Withholding Allowance Certificate

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**.

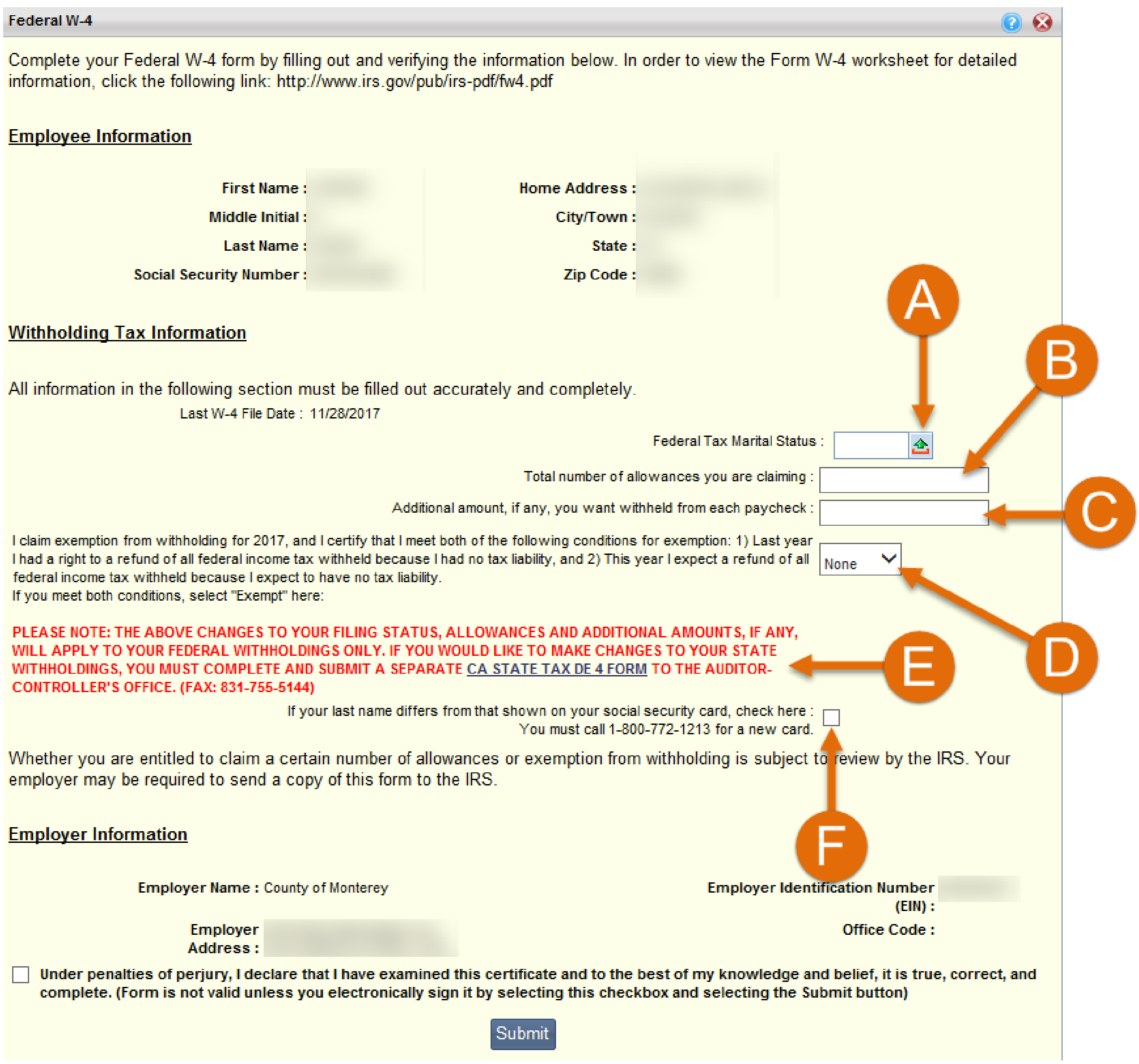


4. A Federal W-4 window will appear.

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...**"

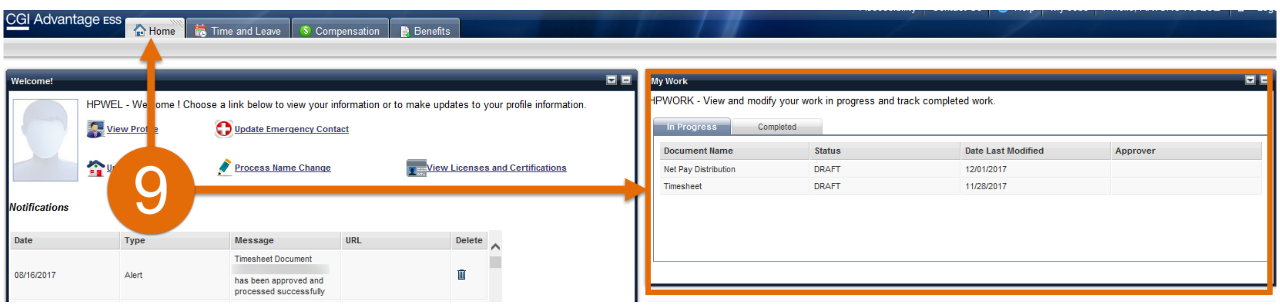


6. Review/confirm all information and click the checkbox under the "**Under of Perjury Penalties**…" statement for electronic signature.

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.



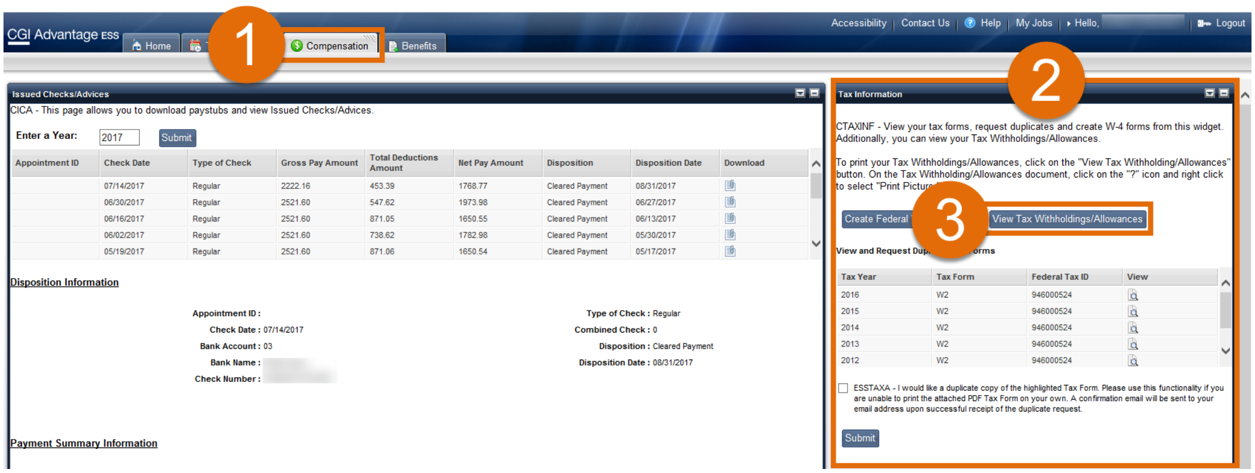
Interaction #2: To View W-4 Allowances

Description: For an employee to view and print W4 Allowances

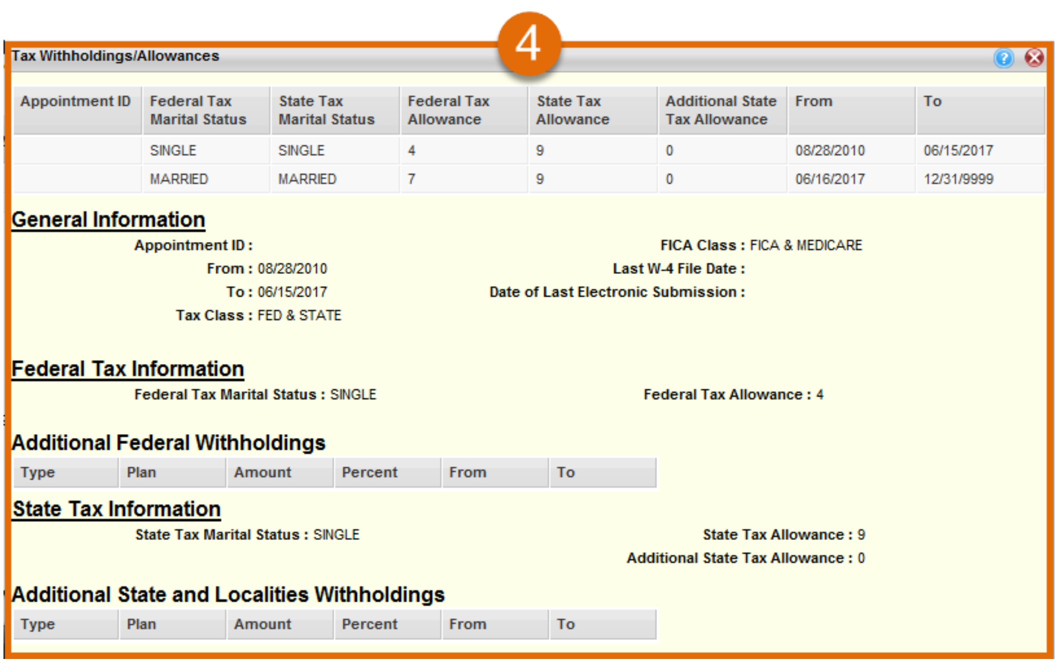
1. Navigate to and select the **Compensation** tab, located on the top navigation menu

2. Navigate to the **Tax Information** widget.

3. Click the **View Tax Withholdings/Allowances** button.



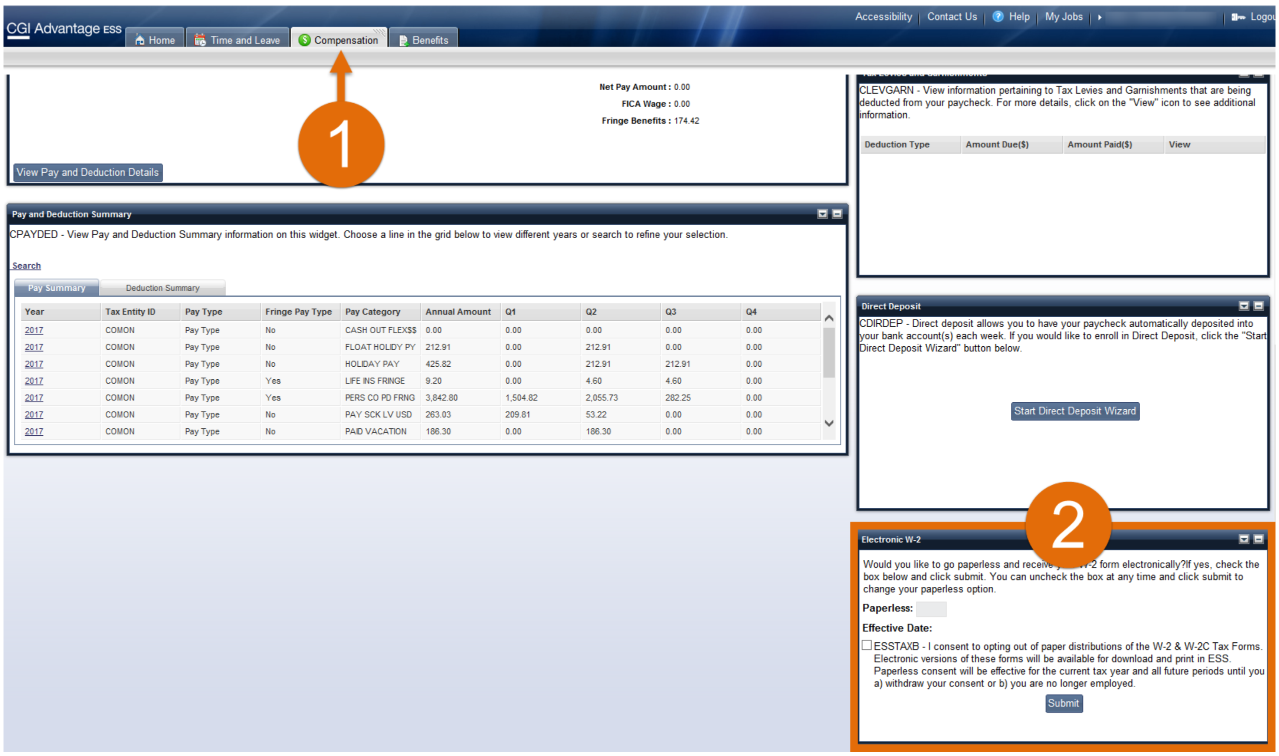
4. The Employee Tax Withholding/Allowances details will open up.



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

Date	Editor	Revisions
3/01/2018	D. Wilson	• SAMPLE
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