

CGI Advantage[®] ESS

**User Guide
Release 3.10**

CGI Advantage

CGI

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CGI Advantage Employee Self Service

What is ESS?

CGI Advantage Employee Self Service (ESS) is a secure application that allows employees to access their data that is being maintained in the CGI Advantage HRM system utilized by your organization's Human Resource and Payroll professionals. An employee may use ESS to view their HR and Payroll related data and when allowed are able to submit a change or even enter new data. All information entered by an employee into ESS may require additional HR or Payroll department approval before the entered change takes effect. Please contact your HR or Payroll department if you have additional questions about access to specific areas of ESS. This guide describes each of the features available within ESS.

- The **ESS Overview** section provides general help on topics such as navigating ESS, standard features, downloading PDF versions of the help, etc.
- The **Home, Time and Leave, Compensation, Benefits, Performance, and Workers' Comp** sections provide information regarding the widgets which are available on each of the main tabs in the ESS application. For example, if you wish to view help on the Current Evaluations widget, which is located on the Performance tab in the ESS application, select the Performance tab shown at the top of the Help, then select the Evaluations sub tab and the Current Evaluations widget bullet. The help for the Current Evaluations widget will then be displayed.
- The **FAQ** section lists commonly asked questions regarding your organization's business practices with answers based on experience from Advantage ESS user inquiries. These questions are specific to your organization's business policies and procedures, such as your leave policy or performance evaluation procedures, etc. The FAQ page can be customized by your administrator with questions that are relevant to your organization. Refer to the FAQ page for information on how you can submit questions/answers to this page.

ESS Overview Tab

CGI Advantage Employee Self Service (ESS) provides various options that allow you to customize the application to best display the data that you need to access in your day to day operations. The following topics provide information on navigating and customizing the ESS application.

About This Help

This guide provides information on the features that are available in the ESS application. The navigation of this help guide is similar to the navigation of the application itself. To display help for a particular area of ESS, simply select a main tab/sub tab from the navigation bar at the top of each help topic.

For instance, if you select the Performance main tab, a list of the available sub tabs is displayed. By selecting one of the sub tabs, a list of the widgets that are located on that sub tab is displayed. When you select one of the widgets, the help for that particular widget is displayed.

You can access help for the entire application by choosing the tab and sub tab for topics which you are interested in learning more about.

Typographical Concepts

This online help system uses the following typographical conventions:

This convention...	Is used for these items...	Examples
Bold	Fields	Enter your user name in the User Name field.
	Buttons	To save your document, select the Save button.
	Links	If the listing in the grid is too long to be displayed in its entirety, use the navigational links (First , Prev , Next , and Last) to move through the listing.
	Check boxes	Select the Automatically Update Application Status check box.
	Menu options	Select History from the secondary navigation panel.
Bold terms separated by colons (:)	Cascading menus	To view alerts, select Message Center: Alerts from the secondary navigation panel. In the above example, the user first selects the menu option Message Center . From the resulting list of options under Message Center , the user then selects the Alerts option.
<i>Italics</i>	Field values	The Relationship field identifies your relationship with a dependent.
	Parameter values	This field cannot be set to <i>Yes</i> if Interest Type is set to <i>Not Applicable</i> or <i>Simple</i> .
	Yes/No references	This help can also be viewed or downloaded in a portable document file (PDF) format by downloading the <i>CGI Advantage ESS User Guide</i> .
	Titles	
"Double quotes"	Sections within a document	For more information about selecting one of your appointments, refer to the "My Jobs" section of this guide.
	Example text	An example broadcast message is "Advantage ESS will be coming down for maintenance at 6:00 PM tonight. All users must log off of the system by that time."

Navigating ESS

- **Tabs/Sub Tabs/Widgets**

Tabs - The ESS application provides employees with data pertaining to Time and Leave, Compensation, Benefits, Performance Management, and Workers' Compensation business functions. Each of these business functions is presented as a tab in the main navigation bar in ESS.



Sub Tabs - Each tab in ESS also contains sub tabs, which organize business functions into more specific categories. For example, the Time and Leave tab contains the Time Information and Timesheets sub tabs. Select the sub tab related to the specific information for which you are looking.



Widgets - Widgets are self-contained windows, within each sub tab in ESS, which provide visual information and/or easy access to frequently used functions. Widgets allow you to access data pertaining to specific information. For example, the Leave Balance Alerts widget, located on the Time and Leave tab, displays your leave balance information.

Leave	Balance
ANNUAL LEAVE	↑ 470:00 Hours
ANNUAL	↑ 221:00 Hours
SICK LEAVE	↑ 197:00 Hours
YTD	↓ 00:00 Hours

- **Customize Your Layout**

ESS allows you to customize the way the widgets are displayed to suit your individual preferences (if enabled at your site). The widgets on each tab can be dragged and dropped to rearrange the order in which they appear. This allows you to determine the placement order based on the information or tasks which you use the most.

You can rearrange the order of the widgets on a sub tab. The example below shows how you can move the Forms and Websites widget to the top of the page from its original location in the middle of the page.

The screenshot displays the CGI Advantage ESS user interface. At the top, there is a navigation bar with links for Home, Time and Leave, Compensation, Benefits, Performance, and Workers' Comp. The main content area is divided into several widgets:

- Welcome!**: A central area with a user profile picture and several action links: View Profile Information, Update Emergency Contact, Reset Password/Set Password Hint, Update Address, Process Name Change, and View Licenses and Certifications.
- Notifications**: A table showing recent messages.

Date	Type	Message	URL
05/00/2013	Enrollment	OPEN ENROLLMENT	
02/17/2013	Alert	Timesheet Document 0211130000000011531 has been approved and processed successfully	
02/15/2013	Alert	Timesheet Document 0211130000000011541 has been approved and processed successfully	
- Quick Links**: A list of frequently used functions such as CREATE BENEFICIARY, Enrollment Wizard, View Employee Benefits and Deductions, View Dependent Benefits, View Dependent Information, VIEW ENROLLMENTS, Create Federal W-4, Set up Direct Deposit, View Issued Checks/Advices, Request Duplicate Tax Forms, Request Electronic W-2, View Tax Levies and Garnishments, View Pay and Deduction Summary, View Tax Withholdings/Allowances, View Performance Evaluations, View Performance Expectations, Launch Meridian, Launch Manager Self Service, View Attendance Card, Create Leave Request, Create Overtime Request, Donate Leave, Enroll in Leave Bank, View Leave Balance Alerts, Modify Leave Bank, View Leave Balance, View Timesheets, View Work Schedule, Create Workers' Comp Claim, and View Workers' Comp Claims.
- My Work**: A section for tracking work progress, showing a table of documents in progress and completed.

Document Name	Status	Date Last Modified	Approver
ESS Employee Leave Request	DRAFT	03/21/2013	
ESS Employee Leave Request	DRAFT	03/21/2013	
ESS Employee Leave Request	DRAFT	03/21/2013	
ESS Employee Leave	
- Forms and Websites**: A table of links to various forms and websites.

Topic	Description	Department	Link	Attachment
Tax	W4 INST WKSHT	****		
Address	W4 INST WKSHT	Personal	WWWEMPLSELFSE	
Miscellaneous	ADVHR40761	Personal	http://www.cgi.com	
Miscellaneous	BUS CASE	Personal		
Enrollment	W4 INST WKSHT	Personal	WWWEMPLSELFSE	
Tax	W4 INST WKSHT	Personal	http://www.cgi.com	
- Favorites**: A section for managing favorite widgets, including an "Add/Modify Favorites" link.

Click and hold the mouse button on the title bar of the widget you wish to move. Then while holding the button, drag the widget to the desired location on the page. As you drag the widget, the other widgets on the page will be moved to make a space for the one being moved. As shown in the image below, an empty space appears with a dotted box around it, allowing you to see where the widget will be dropped.

The screenshot displays the CGI Advantage ESS user interface. At the top, there is a navigation bar with links for Home, Time and Leave, Compensation, Benefits, Performance, and Workers' Comp. The main content area is divided into several sections:

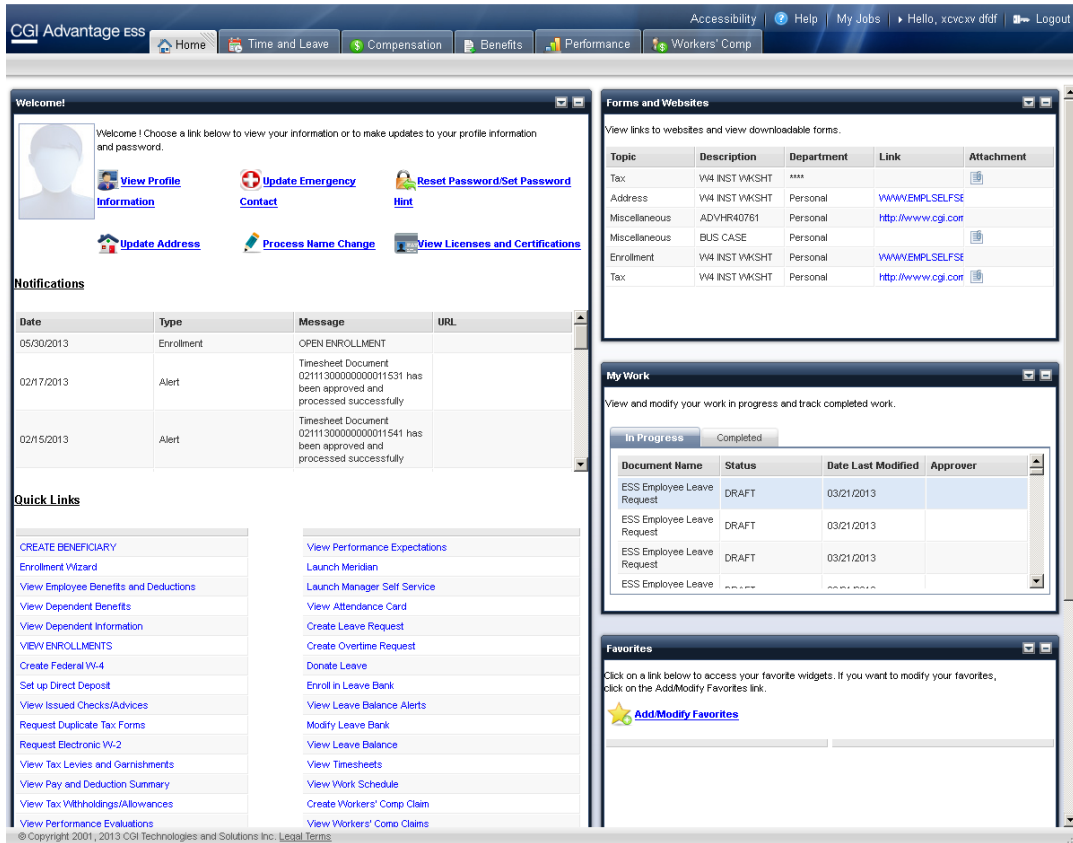
- Welcome!**: A section with a user profile picture and links for 'View Profile Information', 'Update Emergency Contact', 'Reset Password Hint', 'Update Address', 'Process Name Change', and 'View Licenses'.
- Forms and Websites**: A table listing various forms and their details.

Topic	Description	Department	Link	Attachment
Tax	W4 INST VKSHT	***		
Address	W4 INST VKSHT	Personal	WWW/EMPLSELFSE	
Miscellaneous	ADVHR40761	Personal	http://www.cgi.com	
Miscellaneous	BUS CASE	Personal		
Enrollment	W4 INST VKSHT	Personal	WWW/EMPLSELFSE	
Tax	W4 INST VKSHT	Personal	http://www.cgi.com	
- Notifications**: A table showing recent notifications.

Date	Type	Message	URL
05/30/2013	Enrollment	OPEN ENROLLMENT	
02/17/2013	Alert	Timesheet Document 0211130000000011531 has been approved and processed successfully	
02/15/2013	Alert	Timesheet Document 0211130000000011541 has been approved and processed successfully	
- Quick Links**: A list of various system functions such as 'CREATE BENEFICIARY', 'Enrollment Wizard', 'View Employee Benefits and Deductions', etc.
- My Work**: A section for tracking work in progress and completed tasks. It includes a table with columns for Document Name, Status, Date Last Modified, and Approver.


Document Name	Status	Date Last Modified	Approver
ESS Employee Leave Request	DRAFT	03/21/2013	
ESS Employee Leave Request	DRAFT	03/21/2013	
ESS Employee Leave Request	DRAFT	03/21/2013	
ESS Employee Leave Request	DRAFT	03/21/2013	
- Favorites**: A section for accessing favorite widgets, with an 'Add/Modify Favorites' link.

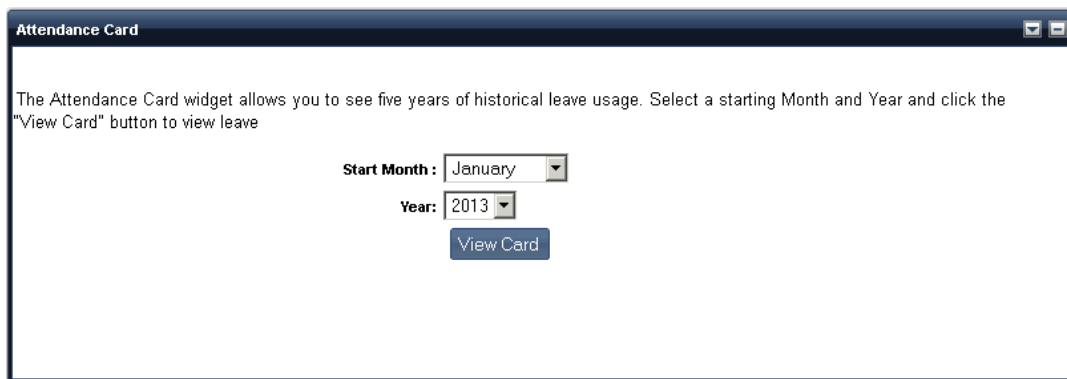
Once you have selected the new location for the widget, release the mouse button and the widget is dropped into the new box.




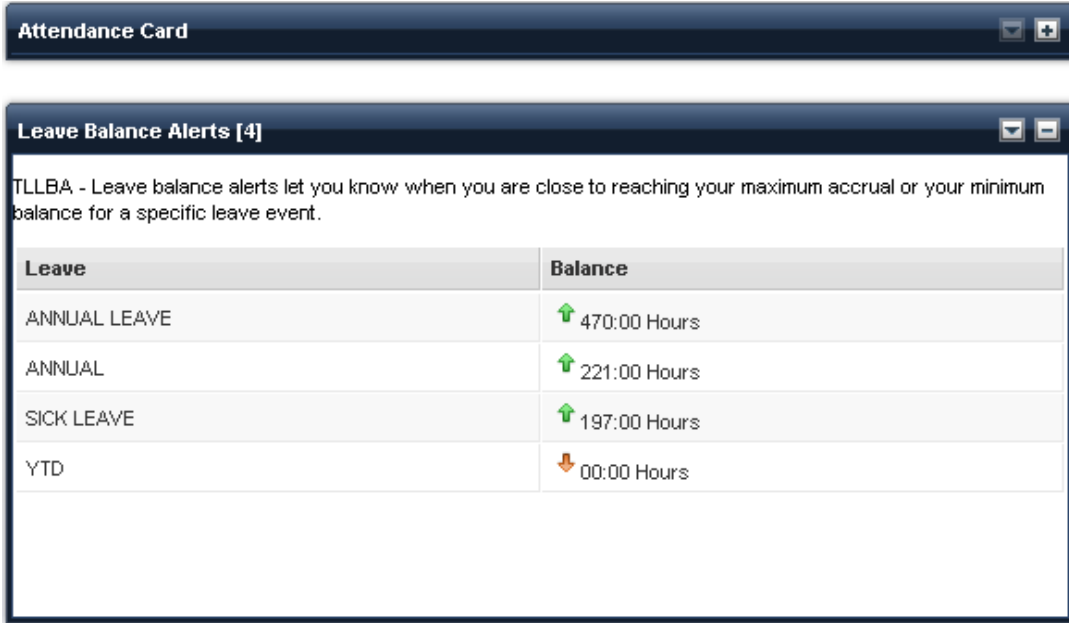
- **Expand/Collapse Widgets**

Each of the ESS widgets can be expanded or collapsed as desired. This allows more flexibility in the way each of the tabs/sub tabs are displayed.

To collapse a widget, select the  icon at the top, right hand corner of the widget title bar.





The widget is collapsed so that only the widget's title bar is displayed. To expand a collapsed widget, select the  icon at the top, right hand corner of the collapsed widget's title bar.



The widget will be restored to it's original size.

- **Baseball Card View**

Several widgets in ESS allow you to view detailed information in what is referred to throughout this guide as a baseball card view. Similar to a real baseball card, which displays information about a player, this view offers detailed information on the record that has been selected from a widget. Some baseball card views also allow you to take action on a particular item, such as approving or rejecting a leave request.

To open a baseball card view from the widgets that offer this option, pass the mouse over the selected record in the widget. When a  down arrow icon appears, click on the down arrow and the baseball card view will be opened. Select the  icon to close the baseball card view.

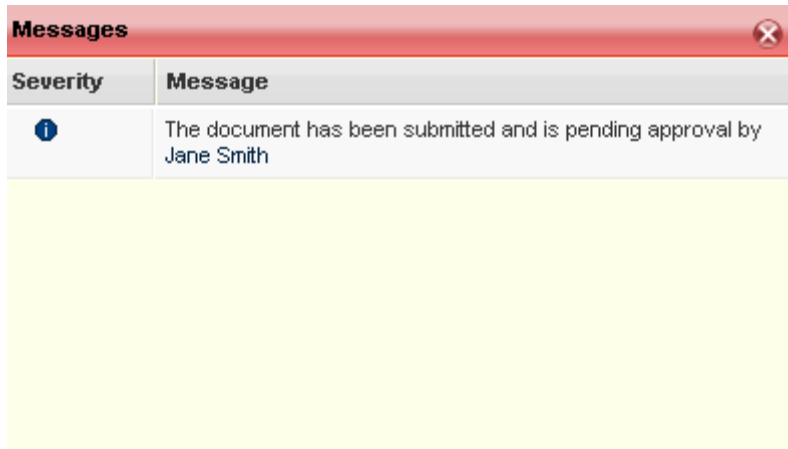
The baseball card view shown below represents the details of a date selected from the Work Schedule and Upcoming Leave widget on the Time and Leave tab.



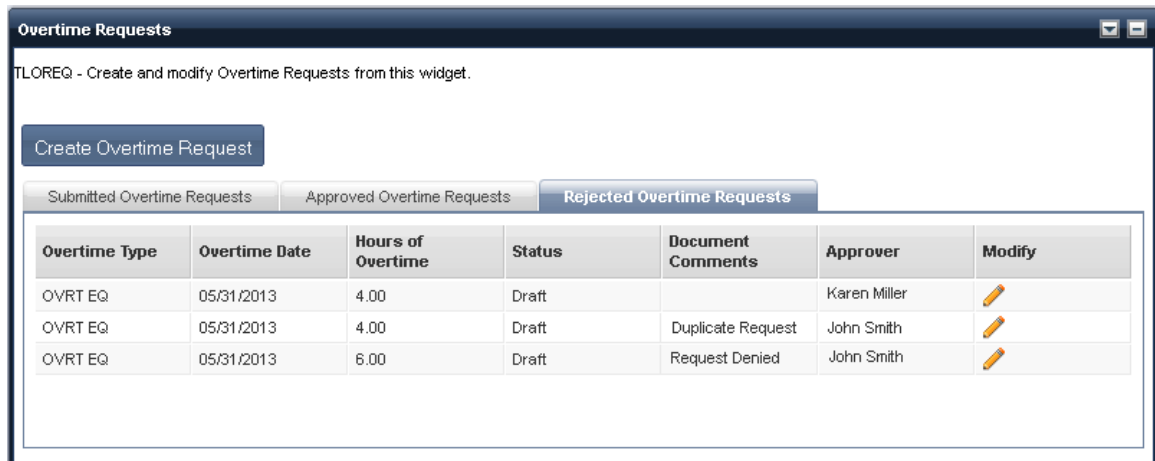
- **Workflow Approval**

After an ESS user submits an ESS document, such as a Timesheet or Leave Request, a pop-up window will be displayed indicating that the document has been submitted and is pending

approval. The display will include the approver’s name if the approver is known. If this document is routed to a workflow role, i.e., the approver is still unknown, “Pending Approver” will be displayed instead of the approver’s name.



All ESS document list inquiries, such as the Overtime Requests, will display the supervisor's name to which the document has been routed for approval and the document's status.



- **Pop-up Blockers**

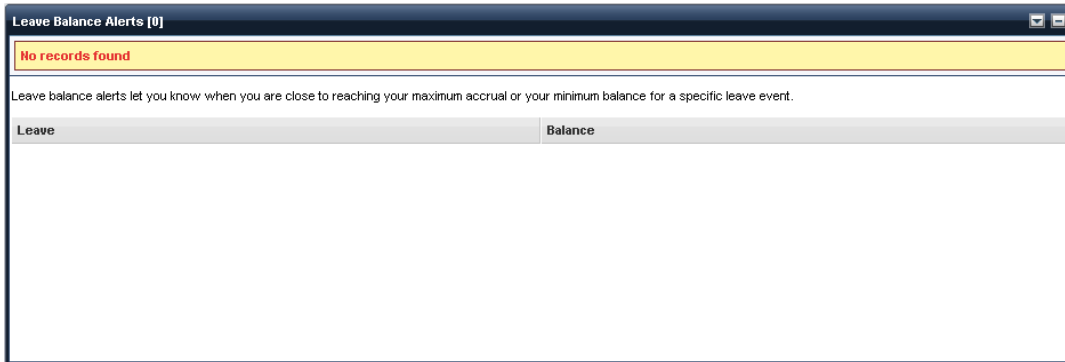
There are Browsers and Browser helper programs/toolbars that have a function to block Pop-Up ads. However, some pop-up blocking programs cannot distinguish between a pop-up ad and a useful new window. Please be aware that the ESS application uses “new browser windows” to display the online documentation. If you are using a pop-up ad blocker program and these windows do not display, then the pop-up blocker program will need to be disabled while using the ESS application.

- **Error Handling**

The ESS application provides for basic error handling in all widgets, including data validation and system /setup errors. If an error is encountered, the ESS application displays a pop up with a brief, informative message that explains the problem and how it can be resolved. The ESS application also utilizes error severity to issue both “error” and “informational” messages. An

“error” message is issued when processing will stop due to the error. An “informational” message is issued when processing will not be stopped by the error. The error severity for each error type is defined by each individual widget.


In cases where data is not available, a widget cannot be loaded, or a baseball card view encounters a problem, an error message is displayed at the top of the widget. For example, in the image below, an message is displayed that indicates "No records found". This




Data validation error messages are also issued via the ESS application. When a data entry error is found, an error message will be displayed in the messages. For example, this type of error is issued when a user does not enter a value in the Leave Bank field when enrolling into a Leave Bank.



Widget Options

Each widget in ESS has an Options menu. Select the  icon at the top right hand corner of the widget to open the Options menu. Select an option below for additional information.


- **Refresh**

Use the  **Refresh** option in the widget Options menu to reload the data in the widget to reflect any changes that were made or to ensure that the most recent data is displayed.

- **Maximize/Restore**

The **Maximize** option is displayed in the Options menu when a widget is not maximized and the **Restore** option is displayed when the widget is maximized. These two options toggle depending on the status of the widget's display. When you maximize a widget, it is expanded so that it is the only widget displayed on the page.

- **Help**

To access the widget help, select the Options drop down menu, and then select  **Help**. The help for that widget is opened. Once the help file is opened, you can then navigate to help for any ESS widget by selecting the tabs and sub tabs shown at the top of the help topic.

- The ESS Overview tab provides general information such as navigating ESS, standard features, etc.
- The Home, Time and Leave, Compensation, Benefits, Performance, and Workers' Comp help tabs provide information regarding the widgets which are available on each of the main tabs in the ESS application. For example, if you wish to view help on the Current Evaluations widget, which is located on the Performance tab in the ESS application, select the Performance tab shown at the top of the Help, then select the Evaluations sub tab and the **Current Evaluations widget bullet**. The help for the Current Evaluations widget will then be displayed.
- The FAQ tab is used to track commonly asked questions from employee's regarding your organization's practices, with answers based on experience. These questions are specific to your organization's policies and procedures, such as your leave policy, performance evaluation procedures, etc. These questions are organized based on the ESS area to which they relate. Each answer, including in some cases links to other business functions, can be found by expanding the functional area and then selecting the question. If you have a question that is not listed here, or you would like to add information to the FAQ, please contact your HR administrator.

Document Attachments

Some functions in Advantage ESS allow you to add file attachments. If allowed, a Document Attachment button will appear on the ESS document. Select the Document Attachment button, then select the Browse button to locate the file you wish to attach. Once an attachment is added to a document, the attachment name will show on the form listing all attachments.

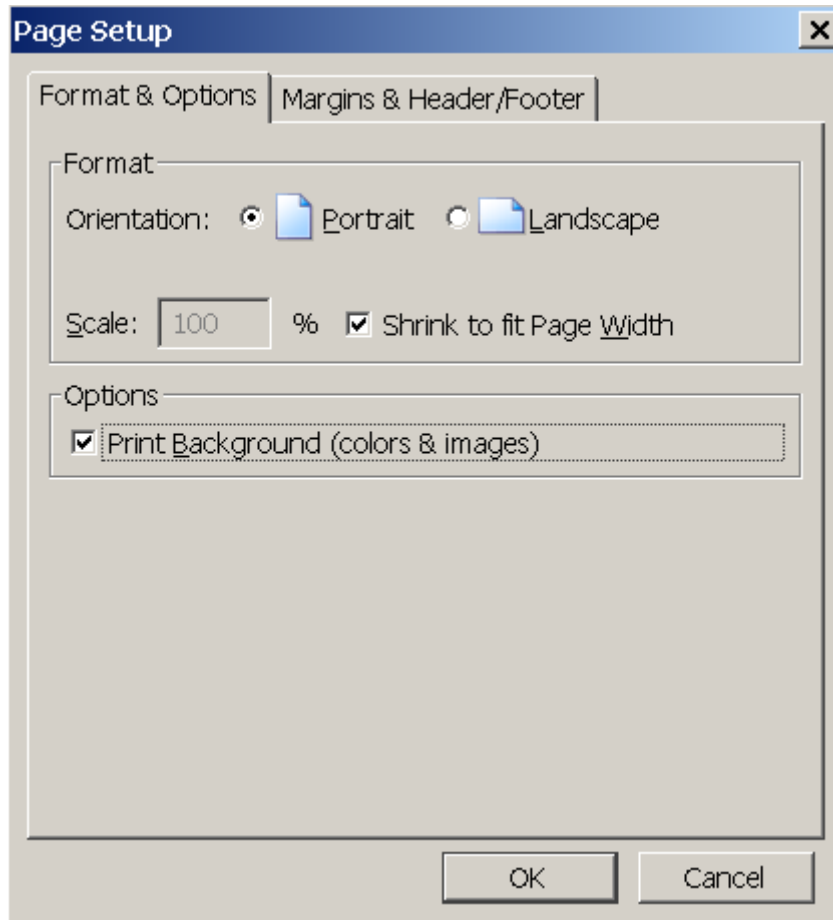
You can also delete attachments from any documents that have not already been submitted. To delete an attachment, select the Document Attachment button. A list of available attachments for the document will be displayed. Select the attachment you would like to remove, then select the Trash can icon next to the filename.

Widget Print Option

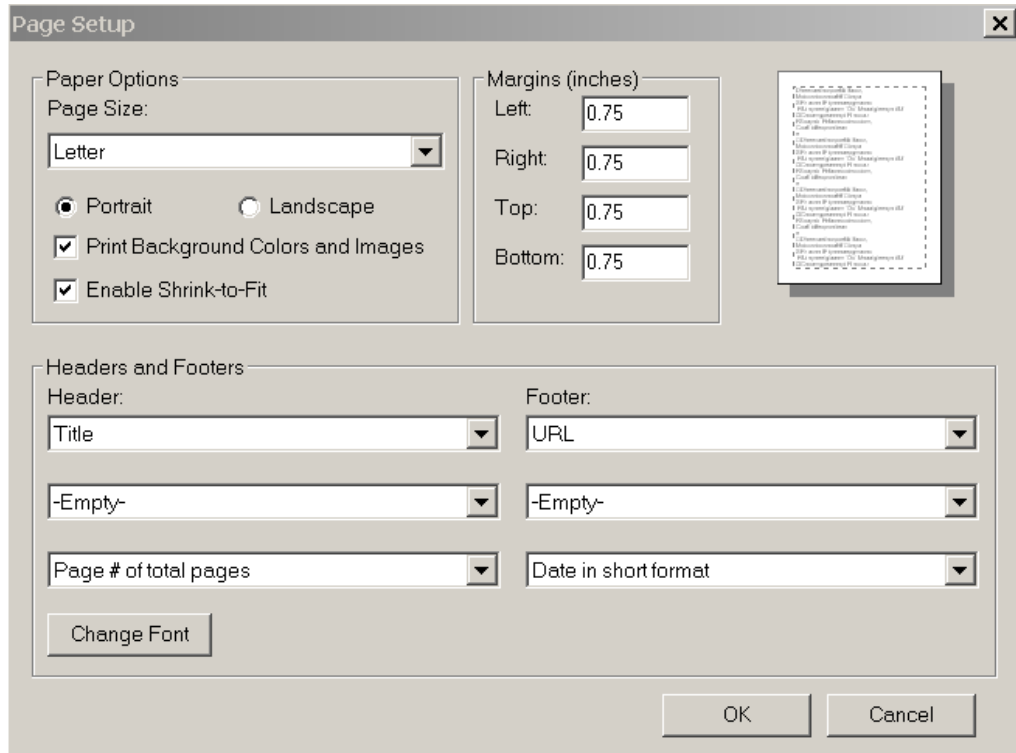
Several widgets in Advantage ESS provide the option to print the information displayed in the widget through the use of the **Print** button. However, in order for the colors in the associated widget to print properly, you must first select the **Print Background** option in Page Setup. If this option is not selected, the widgets will print without colors.

Prior to printing, perform the following steps:

1. From Firefox/Internet Explorer, select **File>Page Setup**.
2. From Page Setup, select the option to print the background colors and images
 - In Firefox, select **Print Background (colors & images)** and then select **OK**.



- In Internet Explorer, select **Print Background Colors and Images** and then select **OK**.



3. Select the  **Print** button on the widget.

Glossary Terms

Appointment - An "appointment" is an employee's job/role within an organization. Some employees have more than one appointment. To select the appointment for which you wish to view or modify information, select the My Jobs link at the top right hand corner of the main navigation bar.

Appointment ID - The unique identifier for the appointment/job within the organization. If the employee has multiple appointments, the Appointment ID can be selected from the Organization Tree widget on the General HR tab.

Baseball Card View - Several widgets in ESS allow you to view detailed information in what is referred to as a baseball card view. Similar to a real baseball card, which displays information about a player, this view offers detailed information on the record that has been selected from a widget.

Documents - "Forms" used to record human resource activities (such as posting a job notice, requesting overtime or leave, timesheets, etc.).

Primary Appointment - If a person is engaged in two or more separate jobs/roles (such as a teaching position and a coaching position) the primary appointment represents the principal job/role.

Tab - The ESS application provides employees with data pertaining to Home Page, Time and Leave, Compensation, Benefits, Performance, and Workers' Comp business functions. Each of these business functions is presented as a tab in the main navigation bar in ESS.

Sub Tabs - Each tab in ESS also contains sub tabs, which organize business functions into more specific categories. For example, the Time and Leave tab contains the Information and Timesheets sub tabs. To access data that pertains to a specific functional area, click the desired tab and sub tab.

Widget - Widgets are self-contained windows within each sub tab in ESS, which provide visual information and/or easy access to frequently used functions. Widgets allow employees to access data pertaining to a specific functionality that they use on a daily basis. For example, the Overtime Request widget, located on the Time and Leave tab, provides information on the Overtime Requests that an employee has submitted.

Download User Guide

The Advantage ESS online help can also be viewed or downloaded in a portable document file (PDF) format so that you can download them to your computer, and/or print them for offline use. Please note that you must have Adobe Acrobat Reader installed on your computer before you can view these files.

To Download the ESS Help via a PDF File:

1. From within the online help, right-click on the PDF icon below. Result: A popup menu appears.
2. Select **Save Target As** and navigate to the directory in which you want to save the PDF file.
3. Select **Save**.

If you need help on opening, searching, navigating, or printing this file, refer to your Adobe Acrobat Reader documentation for instructions.



CGI Advantage ESS User Guide

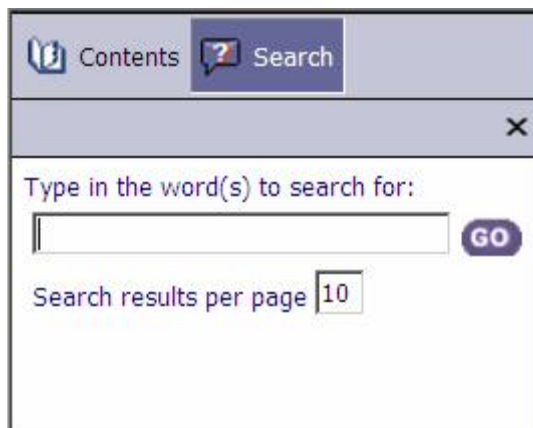
Searching the ESS Help

To Find Information Using the Search Tab:


1. Select the Search tab in the upper left hand corner of the navigation pane.



2. The Search navigation panel will drop down. Type the word or phrase you want to find in the search box and select Enter or Go.



3. The topics in which your search criteria appear are listed in the Contents tab.
4. Select a topic from the search result listing in the Contents tab. Result: That topic's information appears in the right-side frame.

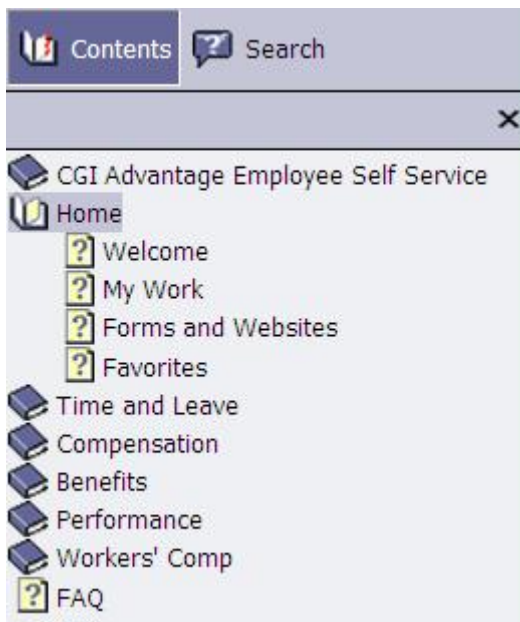
- To enter a new search, repeat the above steps, typing over the word or phrase in your original search.
- To hide the Search navigation panel, select the  icon at the top of the navigation panel.


To Find Information Using the Contents Tab:

- Select the **Contents** tab in the upper left hand corner of the navigation pane.



- The Contents navigation panel will drop down, displaying the table of contents sorted by functional area of Advantage ESS.



- Select a help topic from the Table of Contents. Result: The right hand panel will display the selected help topic.
- To hide the Contents navigation panel, select the  icon at the top of the navigation panel.

My Jobs

Use the **My Jobs** link on the main tool bar to select the job appointment (role) for which you wish to view or modify information.



After selecting the My Jobs link, a popup window opens, displaying a list of all your job appointments. The Job Status column displays whether or not the job appointment is Active.

My Jobs
 Select a job from the grid below to view information for your different roles. If you have any inactive roles, they are shown in italics.

Select	Primary	Department	Unit	Title	Job Status
✓	Yes	Personnel	HRM Support	Payroll and Benefits Coordinator	Active
		Department 100	Coaching	Girls Field Hockey Asst Coach	Active

Save Close

Select a job appointment by clicking anywhere on the appointment's line. A check mark will appear in the Select column for the job appointment that is currently selected. The selected appointment will be used to display or modify data in the system.

For instance, you can create timesheets for either your primary or secondary appointments (such as a teaching position and a coaching position) based on the selected appointment in **My Jobs**. If you have multiple job appointments, you will need to select the appropriate appointment from My Jobs before creating a timesheet. Once the appointment is selected, and you go to the Timesheets widget, the information displayed will be for the selected appointment.

Meridian Global and Manager Self Service (MSS) Access

Advantage ESS allows authorized users of Meridian Global and/or Advantage Manager Self Service (MSS) to sign into the applications directly from Advantage ESS. If your HR administrator allows access to one or both of these applications through Advantage ESS, a link will be available from the Quick Links section of the Welcome widget on the Home tab.

Quick Links

Enrollment Wizard
Paycheck Calculator
Launch Meridian
Launch Manager Self Service
View Attendance Card
Create Leave Request
Create Overtime Request

If you have a valid ID to access the application, once you select the link from Quick Links, you will be automatically signed into the selected application. You will not be allowed to access if you do not have a valid user ID for the selected application.

Home Tab

The Home Tab in Advantage ESS displays announcements and notifications from your employer, allows you to define links to key documents and informational pop-ups, quick links to other areas of the ESS application, and links that provide quick access to update your personal information, contacts, ESS login passwords, etc. This tab also contains a widget to display documents that you have initiated in Advantage ESS and a widget that provides links to forms or websites that are important for your organization.


Welcome!

The Welcome page displays announcements and notifications from your employer, links to the key documents and informational pop-ups, quick links to other areas of the ESS application, and a multi-media section where videos can be displayed. The Main Links at the top of the widget allow you quick access to update your personal information, contacts, ESS login passwords, etc.

Select a highlighted area below for additional information on each section of the Welcome widget. For information on each of the Main Links, select the highlighted Main Links area in the image below.

Welcome!

Welcome! Choose a link below to view your information or to make updates to your profile information and password.




[View Profile Information](#)

[Update Address](#)



[Update Emergency Contact](#)

[Process Name Change](#)



[Reset Password/Set Password Hint](#)

[View Licenses and Certifications](#)

Notifications

Date	Type	Message	URL
03/24/2013	Alert	ESS Employee Emergency Contact Document 02201300000000000045 has been approved and processed success More	
03/24/2013	Alert	ESS Employee Emergency Contact Document 02201300000000000044 has been approved and processed success More	


Quick Links

- Create Beneficiary
- Enrollment Wizard
- View Employee Benefits and Deductions
- View Dependent Benefits
- View Dependent Information
- View Enrollments
- Create Federal W-4
- Set up Direct Deposit
- View Issued Checks/Advices
- Paycheck Calculator
- Request Duplicate Tax Forms
- Request Electronic W-2
- View Tax Levies and Garnishments
- View Pay and Deduction Summary
- View Tax Withholdings/Allowances

- View Performance Evaluations
- View Performance Expectations
- View Attendance Card
- Create Leave Request
- Create Overtime Request
- Donate Leave
- Enroll in Leave Bank
- View Leave Balance Alerts
- Modify Leave Bank
- View Leave Balance
- View Timesheets
- View Work Schedule
- Create Workers' Comp Claim
- View Workers' Comp Claims

Multimedia

CGI rings the closing bell on the New York Stoc...



Welcome - Main Links

The ESS Welcome widget contains links to several key documents and informational pop-ups including:

- [View Profile Information](#) - Allows you to view you employee profile information.
- [Update Emergency Contacts](#) - Allows you to update your emergency contact information.
- [Reset Password/Set Password Hint](#) - Allows you to set or reset your password or to set your password reset hints.
- [Update Address](#) - Allows you to update your current address information.
- [Process Name Change](#) - Allows you to change your name.
- [View Licenses and Certifications](#) - Allows you to view your licenses and certifications on file.

View Profile Information

Profile Tab

The Employee Profile pop-up window allows you to view your employee related information.

Employee Profile

Supervisor Name: Tom Baker

Pay Location: FAIRFAX

Work Location: FAIRFAX

Seniority Date:

Seniority Number:

Work Cycle:

Employment Status: ACTIVE

Employment Type: Permanent

Home Department: Personal

Home Unit: School Board

Position Number: SUPERINTENDENT

Title: SUPERINTENDENT

Sub-Title: ASSISTANT SI

Probation Start Date: 01/01/2010

Probation End Date: 02/01/2010

Position Tab

The **Position** tab displays your current and prior position details.

Employee Profile

Department	Unit	Position Number	Percent Full Time	Title	From Date	To Date
Personal	School Board	SUPERINTEND	1.0000	SUPERINTEND	01/23/2012	12/31/9999
Personal	010-1010	SUPERINTEND	1.0000	SUPERINTEND	01/18/2012	01/22/2012
Personal	School Board	SUPERINTEND	1.0000	SUPERINTEND	01/01/2010	01/17/2012

Contact Tab

The **Contact** tab allows you to view your contact details. This includes the **Employee Contact Information** and **Emergency Contact Information** sections.

The screenshot shows the 'Employee Profile' window with the 'Contact' tab selected. It is divided into two main sections: 'Employee Contact Information' and 'Emergency Contact Information'.

Employee Contact Information	Emergency Contact Information
Home Address: 152 BRADFORD STREET HARRISBURG PA 18524 USA	First Emergency Contact: ROBERT SMITH
Email Address: SSMITH@AMS.COM	Relationship: SPOUSE
Home Phone: 814-555-1212	Contact Home Number: 814-555-1212
Mobile Phone: 814-555-2234	Contact Home Address: 165 MAIN STREET HARRISBURG PA 16889 USA
Work Phone: 814-555-7772	Second Emergency Contact:
Work Phone Extension:	Relationship:
Contact Home Number:	Contact Home Address:

Compensation Tab

The **Compensation** tab allows you to view a selected employee's prior pay details.

The screenshot shows the 'Employee Profile' window with the 'Compensation' tab selected. It displays a table of compensation history.

Personne Action	Employment Status	Grade	Step	Amount Basis	Base Rate	Pay Rate	% Full Time	From Date	To Date
CORRECT	ACTIVE			Annual Salary	50000.00	50000.00	1.00	01/23/2012	01/21/2013
CORRECT	ACTIVE			Annual Salary	50000.00	100000.00	1.00	01/01/2010	01/22/2012

Education Tab

The **Education** tab allows you to view your prior education details.

School	Degree	Major	Minor	From Date	To Date
CAMBRIDGE	BUSINESS ADMIN	ADMINISTRATION	ACCOUNTING	01/01/2010	01/01/2011

Training Tab

The **Training** tab allows you to view your training details.

Course	School/Course Location	Course/Grade Status	Course Cost (\$)	Course Level	From Date	To Date
FIRE & SAFETY	GEORGE MASON		3500.00	INTERMED	05/23/2010	12/31/9999

Work History Tab

The **Work History** tab allows you to view your prior work experience details. If the **Description of Duties** is too long to see, you can click on **More** to displays the rest of the description.

Company	Work Type	Position Title	Employment Type	Start Date	End Date	Description of Duties
STATE COLLEGE SCHOOL BOARD	SUPERVISOR	SUPERINTENDE	Contract	07/22/1996		SUPERINTENDEI OF THE STATE CO..... More

Update Emergency Contacts

The Update Emergency Contacts widget allows you view or modify your emergency contact information. You can add/modify information in one of the following three ways.

- Add New Contact - Select the Add Emergency Contact button to insert a new line.
- Delete Line - Existing contact lines can be deleted by selecting the trash can icon for the associated line you wish to delete.
- Copy Line - You can also add a contact by copying an existing contact. Select the copy icon on the line for the contact you wish to copy. A new line will be inserted and you can modify the information as needed.

If the contact is a spouse with the same employer, select the Spouse works for Same Employer? check box and enter the Spouse ID. You can enter up to four phone numbers and two e-mail addresses for each contact. Select the Primary Phone and Primary E-Mail check box next to the phone number or email address that should be used as the primary contact method.

Once you have made all your changes, select the Submit button to save your emergency contacts and return to the Welcome page. If you select the Cancel button, you will exit the Update Emergency Contacts pop up without saving your changes and return to the Welcome page.

Update Emergency Contacts
?
X

First Name	Last Name	Relationship	Phone	Email	Delete Line	Copy Line
FAITH	SMITH		8145551212	email1.xxx.com	🗑️	📄
ROBERT	SMITH	SPSE	8145551212		🗑️	📄
STEVE	SMITH		8145551212		🗑️	📄

Add Emergency Contact

Enter Address Information

Enter the contact name and address information below. Additional emergency contacts can be added by clicking the "Add Emergency Contact" button.

Contact Name Prefix:

*Contact First Name:

Contact Middle Name:

*Contact Last Name:

Contact Name Suffix:

Contact Description:

Relationship:

Home Dept:

Position ID:

Spouse works for same employer?:

*Street 1:

Street 2:

*City:

*State/Province:

*Zip/Postal Code:

*Country:

County:

Spouse ID:

Name:

Enter Phone and E-mail Information

HPEMER2 - In this section, you can enter up to 4 phone numbers and 2 e-mail addresses for your emergency contact.

Phone

*Phone: <input type="text" value="814-555-1212"/>	Ext: <input type="text"/>	Type: <input type="text" value="Home"/>	Primary Phone: <input checked="" type="checkbox"/>
Phone: <input type="text"/>	Ext: <input type="text"/>	Type: <input type="text" value="Fax"/>	Primary Phone: <input type="checkbox"/>
Phone: <input type="text"/>	Ext: <input type="text"/>	Type: <input type="text" value="Fax"/>	Primary Phone: <input type="checkbox"/>
Phone: <input type="text"/>	Ext: <input type="text"/>	Type: <input type="text" value="Fax"/>	Primary Phone: <input type="checkbox"/>

Email

*E-mail: <input type="text" value="email1@xxx.com"/>	Confirm E-mail: <input type="text" value="email1@xxx.com"/>	Primary E-mail: <input checked="" type="checkbox"/>
E-mail: <input type="text"/>	Confirm E-mail: <input type="text"/>	Primary E-mail: <input type="checkbox"/>

Cancel
Submit

Reset Password/Set Password Hints

The Reset Password pop up allows you to reset your passwords and to fill out password reset questions that will allow you to reset your password from the ESS login page.

Reset Password

To reset your password, you will need to enter the old (current) password, the new password, and then re-enter the new password for verification. Select the Change Password button to submit your changes. If the password is successfully changed, you will receive a confirmation message to let the user know that the password has been reset; otherwise errors will be issued.

Reset Password

On this screen, you can reset your ESS password or set up your ESS password hint security questions.

Reset Password | Set Password Hint

*Old Password:

*New Password:

*Verify New Password:

Change Password

Set Password Hint

You will need to set up three different security questions/answers in order to be able to reset your password on the ESS login screen. Once these questions/answers are set up, you will be able to use the **Forgot Password** link on the login screen. You can change your security questions at any time once you have successfully logged in.

To provide additional security after initial entry, answers to security questions will be displayed as asterisks. You will only be able to see the answers when you are typing them in for the first time. Answers must be made up of letters and/or numbers only; no punctuation or special characters. Answers must be between 3 - 20 characters long.

Reset Password

On this screen, you can reset your ESS password or set up your ESS password hint security questions.

Reset Password **Set Password Hint**


*Security Question 1: What is the last name of your first boyfriend/girlfriend?
 *Answer: What was your dream job as a child?
 *Security Question 2: What is the middle name of your oldest child?
 *Answer: What was your first car?
 *Security Question 3: What is the first name of the boy or girl that you first kissed?
 *Answer: What is your paternal grandmother's maiden name?
 *Answer: What was your childhood phone number including area code (e.g. 000-000-0000)?
 *Answer: What was the last name of your favorite teacher?

Submit

Forgotten Password – Log In Screen

If you have forgotten your password and cannot log into the ESS application, you can select the [Forgot your password?](#) link on the log in screen. The first thing you will need to do is to verify your userid.

Reset Password

 **Reset Password**


Please verify your user id, by entering it in the box below.

Verify User Name:

Submit

You will then be prompted to answer one of your security questions.

Reset Password

 **Reset Password**

In order to have a new password sent to your email, please answer the security question below.

Security Question : What is the last name of your first boyfriend/girlfriend?

***Answer:**

If the question is answered correctly, you will be emailed a temporary password. The email will be sent to the address that was specified on the Update Address window. Once you receive the email, use the temporary password to log in. You will then be prompted to enter a new password.

User Login

User Name:

Old Password:

New Password:

Confirm Password:

Your password has expired.

Press CTRL+D to bookmark AMS ADVANTAGE ESS

If the security question is answered incorrectly, the next question will be chosen randomly and you will again be prompted for an answer. Should you fail to answer all three security questions, the account will be locked. You will need to contact your security administrator to reset your password.

Update Address

The Update Address wizard allows you to modify your address information.

- **Contact Name Information**

The **Contact Name Information** section displays the information that on file for your name. You can change your contact name as desired (for example, if your name is Robert but you prefer to be contacted as Bob, you can enter Bob in the Employee First Name field). Select the Private Home check box to indicate that your home address and personal phone numbers are open to the public. Select Next or the **Enter Address** link to proceed to the next section.

Update Address

Contact Name Information > [Enter Address](#) > Enter Phone > Enter Email

Please verify the information in the fields below.

Contact Name Information

Name Prefix:

Employee Last Name:

Employee First Name:

Name Suffix:

Employee Middle Name:

Residency Code:

Private Home:

Next > Submit

- **Enter Address**

Use the **Enter Address** section to add an unlimited number of addresses. Select the **Add Additional Address** button to add each additional address. Select the **Primary Mailing Address** check box on the line of the address you wish to be used as your primary address.

You can delete a line by selecting the trash can icon on the line you wish to delete, or insert a copied line by selecting the copy icon on the line that you wish to copy. A new line will be added and you can modify the information as needed for the new address.

Select **Next** or the **Enter Phone** link to proceed to the next section.

Update Address ? X

[Contact Name Information](#) > **Enter Address** > [Enter Phone](#) > [Enter Email](#)

Enter in your address information below. If you have more than one address, click the "Add Additional Address" button to add additional lines.

Street	City	State/Province	Zip/Postal Code	Primary	Delete Line	Copy Line

Add Additional Address

***Street 1:**

Street 2:

***City:**

State/Province:

***Zip/Postal Code:**

Country:

County:

Primary Mailing Address:

< Previous
Next >
Submit

- **Enter Phone**

Use the **Enter Phone** section to add up to four phone numbers. At least one phone number must be entered. Select the Primary Phone check box on the line of the phone number you wish to be used as your primary phone number.

Select **Next** or the **Enter Email** link to proceed to the next section.

Update Address ? X

[Contact Name Information](#) > [Enter Address](#) > **Enter Phone** > [Enter Email](#)

Enter in your phone information below.

***Phone:** **Ext:** **Type:** **Primary Phone:**

Phone: **Ext:** **Type:** **Primary Phone:**

Phone: **Ext:** **Type:** **Primary Phone:**

Phone: **Ext:** **Type:** **Primary Phone:**

< Previous
Next >
Submit

- **Enter E-mail**

Use the **Enter E-mail** section to add up to two e-mail addresses. At least one e-mail address must be entered. Select the Primary E-mail check box on the line of the e-mail address that you wish to use as your primary e-mail address. Select **Submit** to save your changes or Previous to return to a previous section.

You can remove addresses at any time by selecting the trash can icon to on the line you wish to remove.

Process Name Change

The Process Name Change pop up allows you to change your name. You will need to enter the **Name Change Reason** and provide the new name. You can also attach documents that support the reason for the name change. Select **Submit** to submit your name change request and return to the Welcome page. Select **Cancel** to exit without saving your changes.

View Licenses and Certifications

The View Licenses and Certifications pop up allows you to view the licenses and certifications you have on file.

Licenses and Certifications ✖

View information pertaining to your licenses and certifications on this screen.

License/Certificate Type	Issue Country	Issue State	License/Certificate Number	From	To
99	USA	VA	R0000001	01/01/2012	12/31/9999

License/Certification Type: 99 **From:** 01/01/2012
License/Certificate Number: R0000001 **To:** 12/31/9999
Issue Country: USA **Comment:** STATE ISSUED LICENSE
Issue State: VA

Welcome - Quick Links

The **Quick Links** section provides quick access to other areas of the ESS application. Once a Quick Link is selected, you will be directed to the selected widget.

For example, if the View Timesheet quick link is selected, you will be directed to the Timesheets widget on the Time and Leave page. If you select the Create Leave Request quick link, you will be navigated to the Time and Leave tab > Time Information sub tab, and the Leave Request document will be opened.

Welcome - Notifications

The **Notifications** section displays various announcements or notifications that have been issued, including the date the notification was issued, the type of notification (for example, an Alert, Broadcast, or Announcement), the associated message, and any relevant links. For large messages, select the More link to display the rest of the message.

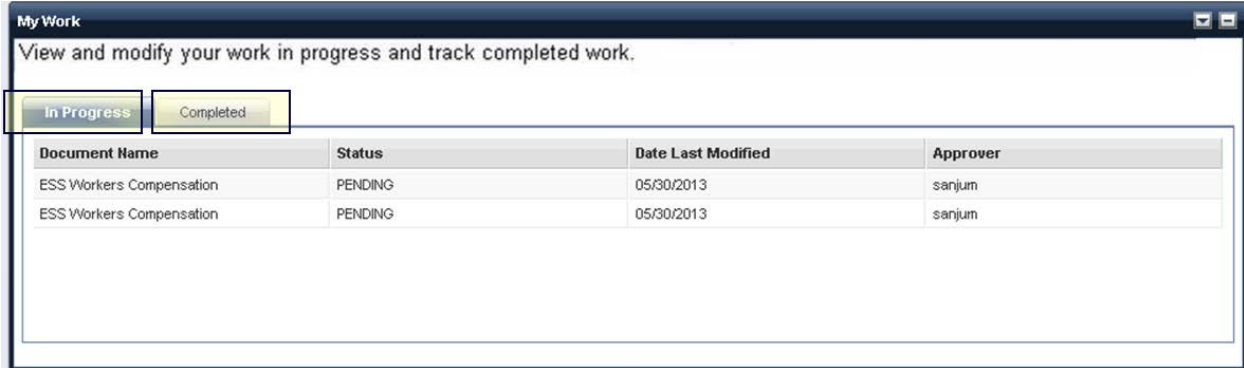
Date	Type	Message	URL
01/01/2012	Announcement	ALL-HANDS MEETING	http://www.cgi.com
02/10/2007	Broadcast	TROT DRILL scheduled for 3/15/2007 at 1500 hrs has been cancelled.	
11/16/2006	Broadcast	Broadcast from INALRT page	

Welcome - Multimedia

The **Multimedia** section allows you to view any videos that have been posted by your employer. If no videos are posted, this section will not appear.

My Work

The My Work [widget](#) allows you to view a list of documents that you created from ESS. Documents are sorted by those that are still in progress, and those that are completed.



In Progress

The In Progress tab displays a list of the documents you created from ESS that have not yet been finalized. Only documents that have not been finalized are displayed on this tab.

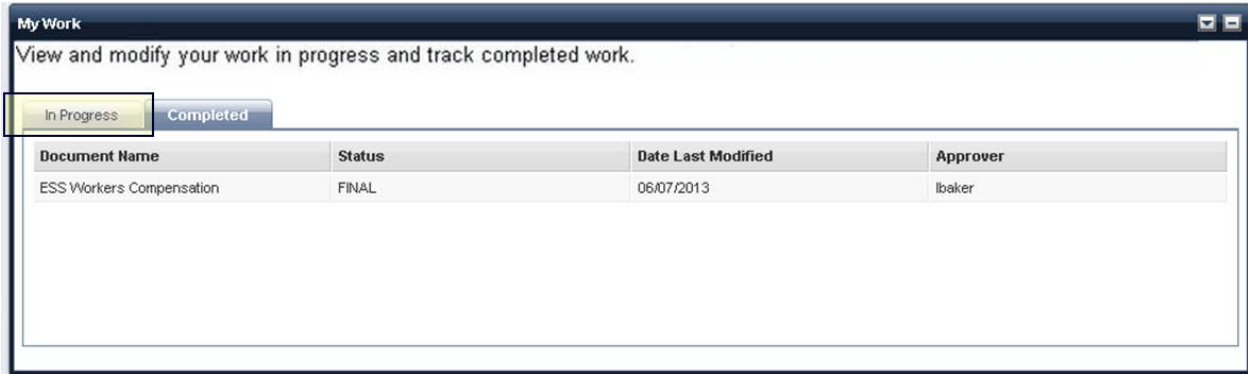
Note: Benefit Enrollment documents are not displayed on the In Progress tab. These documents can be viewed from Benefits - Past Enrollments or Current Enrollments.




Completed

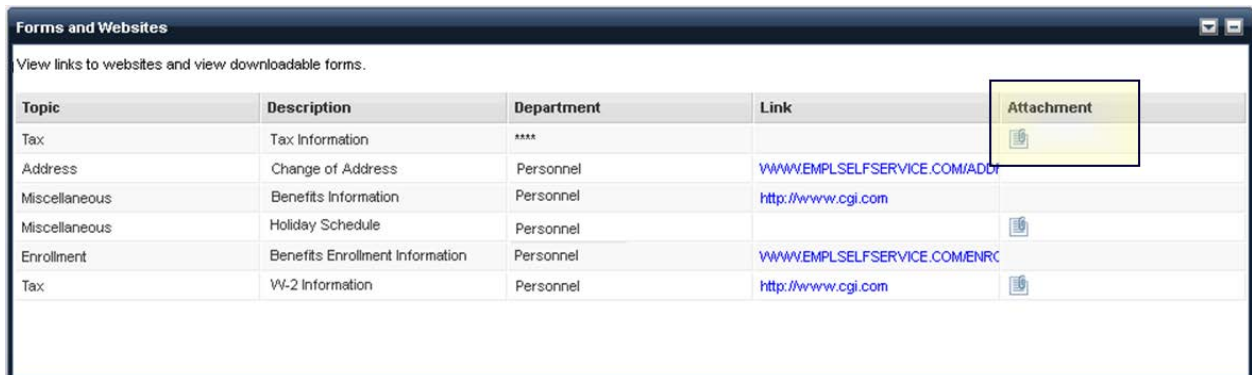
The Completed tab displays documents that you have created in ESS which have been Submitted.

Note: ESS Enrollment Wizard documents are not displayed on the Completed tab. These documents can be viewed from Benefits - Past Enrollments or Current Future Enrollments.




Forms and Websites

The Forms and Websites [widget](#) displays a list of topics, along with any associated forms or links to websites, which are posted by your employer for you to view. Select the **Attachments**  icon to open a pop up window that allows you to download the related attachment(s). Select the link in the **Link** column to launch the website related to the topic.



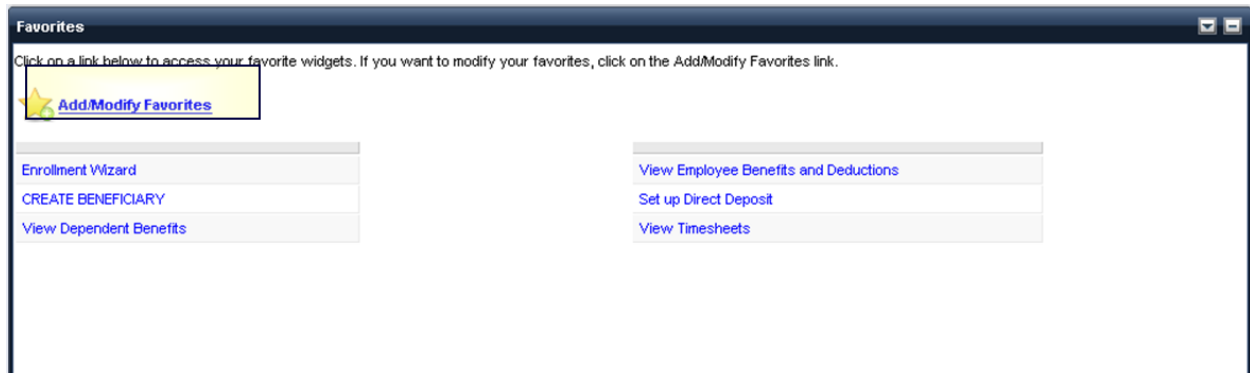
Forms and Websites Information

When you select the Attachments  icon, a pop up window will open with a list of attached forms or websites that are related to the selected topic. Select the **Download** button to download an attachment.



Favorites

The Favorites [widget](#) allows you to set up links to your favorite widgets to make them easily accessible as quick links. Favorites are sorted by each of the main tabs: Home page, Time and Leave, Compensation, Benefits, Performance, and Workers' Comp. To set a favorite, select the **Add/Modify Favorites** link, which will open a pop-up window where you can choose a functional area from a drop down menu, and then select **Add to Favorites**.



Add Modify Favorites

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 change to a trash can icon. To remove an item from your favorites, click the trash can icon. When you have finished making changes, select the **Save Favorites** button.

Favorites ✕

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

[Save Favorites](#)

Time and Leave Tab

The Time and Leave tab allows you to view and initiate overtime time and leave requests, check your leave balances and work schedules, view, create and submit timesheets, and view your attendance records.

Time Information

The following [widgets](#) can be found on the Time Information sub tab:

- [Leave Requests and Usage](#)
- [Attendance Card](#)
- [Leave Balance Alerts](#)
- [Overtime Requests](#)

Leave Requests and Usage

The Leave Requests and Usage [widget](#) allows you to create and modify new leave requests, view leave balances, enroll in leave banks, and donate leave.

The Leave Requests and Usage widget also provides a listing of submitted, approved, and rejected leave requests, including the type of leave, dates of the leave request, status, and the person approving the request. If the leave has not yet been approved, you can modify the request.

Leave Type	Start Date	End Date	Status	Approver	View
ANNUAL USAGE	03/19/2013	03/20/2013	Pending	sanjum	
ANNUAL USAGE	03/09/2013	03/10/2013	Pending	sanjum	
ANNUAL USAGE	03/21/2013	03/21/2013	Pending	sanjum	
SICK USAGE	03/22/2013	03/22/2013	Pending	sanjum	
SICK USAGE	01/02/2013	01/02/2013	Pending	sanjum	
ANNUAL USAGE	01/02/2013	01/02/2013	Pending	sanjum	

Create Leave Request

Select the **Create Leave Request** button to initiate a new request for leave (for example, vacation, short term disability, long term disability, etc.). When the Leave Request page is opened, perform the following steps:

1. Select the **Leave Type**, and enter the Start Date and End Date for the request.
2. Enter the **Input Amount** (amount of leave), and any comments you wish to include.

3. Select **Submit** to submit your leave request or select **Save** to save the request without submitting it.

Leave Request ? ✖

Enter in the details of your leave request below.

Leave Type	Start Date	End Date	Delete Line	Copy Line

[Add Line](#)

***Leave Type:**

Partial Day:

***Start Date:**

End Date:

Amount:

Comments:

Partial Day Leave Request

To enter a leave request for a partial day, select the Partial Day check box. You will then be able to enter a starting and ending time for each day of the request.

Leave Request ? X

Enter in the details of your leave request below.

Leave Type	Start Date	End Date	Delete Line	Copy Line

[Add Line](#)

***Leave Type:**

Partial Day:

***Start Date:**

End Date:

Amount:

Comments:

View Leave Balance

Select the **View Leave Balance** button to open a window that displays your Leave Balance Information. This page displays a list of the different types of leave available to you. Select the type of leave that you want to view. Information about the leave accrual and availability of the selected leave type is displayed.

Select a link from the bottom of the window to see your **Leave Activity by Date** or **Monthly Accrual and Usage**.

Leave Balance Information ? X

On this page, you can view your leave balance, leave activity by date and monthly leave accrual and usage. Click on a link below to view your leave information.

Leave Balance

[Search](#)

Leave	Balance
ANNUAL LEAVE	470:00
ANNUAL	221:00
LEAVE BANK	300:00
SICK LEAVE	197:00



Click to view: [Leave Activity By Date](#) [Monthly Leave Accrual and Usage](#)

Enroll in Leave Bank

Select the **Enroll in Leave Bank** button to open the Leave Bank Enrollment page and enroll in/opt-out of a leave bank. Perform the following steps:

1. Select either the check box in the **Enrollment Information** section, acknowledging enrollment in the specified Donated Leave program and stating that you agree to the initial leave donation, or select the check box in the Opt-Out Information section, indicating that you are choosing to opt-out of the specified Donated Leave program.
2. Select the **Leave Bank** for which you wish to enroll in or opt-out.
3. Enter the **Effective Date**, which is the date this enroll in/opt-out should begin.
4. Select **Submit** to submit your enrollment request.
5. Select **Close** to return to the Leave Requests and Usage widget.

Leave Bank Enrollment

You can choose to enroll in or opt of a leave bank using this form.


Enrollment Information

TLLBNRL2 - By marking this checkbox, I acknowledge enrollment in the specified Donated Leave program and agree to the initial leave donation.

Opt-Out Information

TLLBNRL3 - By marking this checkbox, I acknowledge that I choose to opt-out of specified Donated Leave program.

Enrollment Details

* **Leave Bank:** 

Effective Date:

Modify Leave Bank

Select the **Modify Leave Bank** button to open a page that allows you to view a list of all Leave Banks in which you are currently enrolled and to modify your enrollments/opt-outs. This window displays the Enrollment details, including whether you have elected to enroll in or opt-out of the Leave Bank and the date your enrollment/opt-out began. To modify a Leave Bank enrollment, select the Modify icon on the line for the Leave Bank enrollment you wish to modify.

1. Select either the check box in the **Enrollment Information** section to enroll in the selected Donated Leave program, or select the check box in the **Opt-Out Information** section to opt-out of the specified Donated Leave program.
2. Select **Submit** to submit your enrollment request.
3. Select **Close** to return to the Leave Requests and Usage widget.

Leave Bank Enrollment ? ✕

You can choose to enroll in or opt of a leave bank using this form.

Leave Bank	Enrollment Date	Modify
		?

Enrollment Information

TLLBNRL2 - By marking this checkbox, I acknowledge enrollment in the specified Donated Leave program and agree to the initial leave donation.

Opt-Out Information

TLLBNRL3 - By marking this checkbox, I acknowledge that I choose to opt-out of specified Donated Leave program.

Enrollment Details

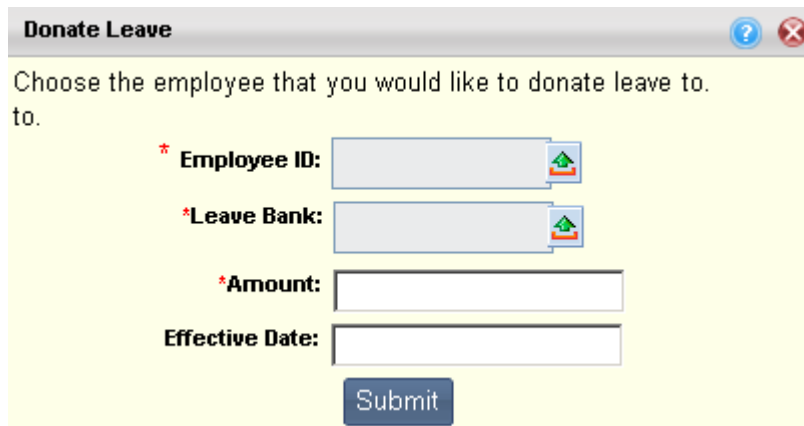
Leave Bank:

Effective Date:

Donate Leave

Select the **Donate Leave** button to open the Donate Leave page. The Donate Leave page allows you to directly donate leave to another employee within the same leave category. To donate leave in the leave bank, perform the following steps:

1. Select the **Employee ID** of the person for which you are donating the leave.
2. Select the **Leave Bank** from which you are donating the leave.
3. Enter the **Amount** of leave you are donating.
4. Select **Submit** to submit your direct donation request.
5. Select **Close** to return to the Leave Requests and Usage widget.



The screenshot shows a web form titled "Donate Leave" with a yellow background. The form contains the following fields and controls:

- A header bar with the title "Donate Leave", a help icon (question mark), and a close icon (X).
- Instructional text: "Choose the employee that you would like to donate leave to. to."
- A required field labeled "* Employee ID:" with a text input box and a dropdown arrow icon.
- A required field labeled "* Leave Bank:" with a text input box and a dropdown arrow icon.
- A required field labeled "* Amount:" with a text input box.
- A field labeled "Effective Date:" with a text input box.
- A blue "Submit" button at the bottom.

Submitted, Approved, and Rejected Leave Requests

The **Submitted Leave Requests** section of the Leave Requests widget displays all the leave requests that you have submitted that have not yet been approved or rejected. The information listed includes the start and end dates of the request, the status of the request, and the person who is designated to approve the request.

The **Approved Leave Requests** section displays Leave Requests that have been approved and are now in a Final status. You may select the View icon to display the request, but you will not be allowed to make any changes.

The **Rejected Leave Requests** section displays Leave Requests that were rejected by your manager. The Document Comments column will display any comments that were entered when the request was rejected. If you wish to make changes to the request and resubmit it, select the Modify icon to open the request, make your changes, then select the **Submit** button. The request will be sent to your manager once again for approval.

Attendance Card

The Attendance Card [widget](#) allows you to view your leave usage over the course of a year. When you open the Attendance Card widget, you are presented with Month and Year selection drop down menus. Once you make your selection, select the **View Card** button and you will see your leave details for a year. For example, if you set the **Select Month From** to January, select 2013 for **Year**, and select the **View Card** button, your leave details are displayed in an annual calendar format from January 2013 to December 2013.



View Attendance Card

The Attendance Card view shows leave taken throughout the year, including Denied Days, Unscheduled/Scheduled leave, Holidays, and Regular/Off Days. The different leave types shown on the Attendance Card can be distinguished by a two-character abbreviation, which is set up by your leave administrator. For example, a sick leave event might display as SL on the Attendance Card.

In the calendar key below, Scheduled leave represents leave that was pre-approved; Unscheduled leave represents leave that was taken but not requested; and Denied leave represents that a leave request was denied, but was taken anyway.

At the bottom of the Attendance Card, the Leave details are displayed.

Multiple Leave Types On One day

When more than one type of leave is taken on the same date, the day is marked as XX and with a color indicator. If there are multiple details in one day with the same leave type then the day is displayed with the **Leave Abbreviation** and a color indicator.

Attendance Card

January 2011 - December 2011 Print

January							February							March							April											
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat					
						1			1	2	3	4	5				1	2	3	4	5						1	2				
2	3	4	5	6	7	8	6	7	8	SL	10	11	12	6	7	8	9	10	11	12	3	4	5	6	7	8	9					
9	10	11	12	13	14	15	13	14	15	16	17	18	19	13	14	15	16	17	18	19	10	11	12	13	14	15	16					
16	17	18	19	20	21	22	20	21	22	23	24	25	26	20	21	22	23	24	25	26	17	18	19	20	21	22	23					
23	24	25	26	27	28	29	27	28						27	28	29	30	31			24	25	26	27	28	29	30					
30	31																															

May							June							July							August											
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat					
1	2	3	4	5	6	7				1	2	3	4						AL	2		1	2	AL	AL	AL	6					
8	9	10	11	12	13	14	5	6	7	8	9	10	11	3	4	5	6	7	8	9	7	8	9	10	11	12	13					
15	16	17	18	19	20	21	12	13	14	15	16	17	18	10	11	12	13	14	15	16	14	15	16	17	18	19	20					
22	23	24	25	26	27	28	19	20	21	22	23	24	25	17	18	19	20	21	22	23	21	22	23	24	25	26	27					
29	30	31					26	27	28	29	30			24	25	26	27	28	29	30	28	29	30	31								
														31																		

September							October							November							December											
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat					
				1	2	3						1						SL	4	5							1					
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	SL	12	2	3	4	5	6	7	8					
11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19	9	10	11	12	13	14	15					
18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26	16	17	18	19	20	21	22					
25	26	27	28	29	30		23	24	25	26	27	28	29	27	28	29	30				23	24	25	26	27	28	29					
							30	31																		30	31					

Holiday

Scheduled

Unscheduled

Denied

Current

Off Day

January 2011 - December 2011

Date	Event Description	Number of Hours
02/09/2011	SICK LV USE	8:00 Hrs
07/01/2011	ANNL LV USE	8:00 Hrs
08/03/2011	ANNL LV USE	8:00 Hrs

3.10 Release

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Leave Balance Alerts

The Leave Balance Alerts [widget](#) provides you with your leave balance information allowing you to ensure that you do not exceed your leave balance threshold levels.

This widget provides notification when you are approaching either your maximum or minimum leave thresholds. The maximum/minimum indicator is displayed in the **Balance** column as either an up arrow or down arrow next to the leave balance. An up arrow represents that you are approaching the maximum for that leave type. A down arrow represents that you are close to exhausting that leave type.

Leave balance alerts let you know when you are close to reaching your maximum accrual or your minimum balance for a specific leave event.

Leave	Balance
ANNUAL LEAVE	↑ 470:00 Hours
ANNUAL	↑ 221:00 Hours
SICK LEAVE	↑ 197:00 Hours
YTD	↓ 00:00 Hours

Overtime Requests

The Overtime Requests [widget](#) allows you to create an overtime request and view your previously submitted overtime requests. The Submitted Overtime Requests table displays all submitted overtime requests with their current status (Approved, Pending, or Draft). Requests that have not yet been approved or rejected can be modified by selecting the Modify icon on the line associated with the request.

TLOREQ - Create and modify Overtime Requests from this widget.

Create Overtime Request

Submitted Overtime Requests | Approved Overtime Requests | Rejected Overtime Requests

Overtime Type	Overtime Date	Hours of Overtime	Status	Approver	View
OVERTIME REQUES	06/08/2013	2.00	Pending	emp-w-uis	
OT LEAVE	06/07/2013	3.00	Pending	emp-w-uis	
OT LEAVE	06/07/2013	1.00	Pending	emp-w-uis	
OVERTIME REQUES	06/04/2013	2.00	Pending	emp-w-uis	
OVERTIME	05/31/2013	5.00	Pending	emp-w-uis	
OVERTIME REQUESTS	05/07/2013	3.00	Pending	lbaker	

Create Overtime Request

Select the **Create Overtime Request** button to open the Overtime Request page to initiate and submit a new request, then perform the following steps:

1. Select the **Overtime Event Type**, Overtime Request Date, the number of Hours of Overtime you are requesting, and any Comments you wish to add.
2. Select **Save** to save the request line.
3. If you are requesting multiple Overtime Event Types, select **Add Line** to add a blank line. Or select the **Copy Line** icon to copy a line you have already saved, then select **Add Line**. The copied line will be inserted and you can modify the copied information for the new request line.
4. Select **Submit** to submit your overtime request.

Enter in the details of your overtime request below.

Overtime Event Type	Request Date	Hours of Overtime	Delete Line	Copy Line

[Add Line](#)

*Overtime Event Type :

*Overtime Request Date :

Hours of Overtime :

Comments :

Submitted, Approved, and Rejected Overtime Requests

The **Submitted Overtime Requests** section of the Overtime Requests widget displays all the overtime requests that you have submitted that have not yet been approved or rejected. The information listed includes the start and end dates of the request, the status of the request, and the person who is designated to approve the request.

The **Approved Leave Requests** section displays Overtime Requests that have been approved and are now in a Final status. You may select the View icon to display the request, but you will not be allowed to make any changes.

The **Rejected Leave Requests** section displays Overtime Requests that were rejected by your manager. The Document Comments column will display any comments that were entered when the request was rejected. If you wish to make changes to the request and resubmit it, select the Modify icon to open the

request, make your changes, then select the **Submit** button. The request will be sent to your manager once again for approval.

Timesheets

The following [widget](#) can be found on the Timesheets sub tab:

- [Timesheets](#)

Timesheets

The Timesheets [widget](#) displays your previously submitted timesheets and allows you to enter a new timesheet. This widget designates timesheets with one of three statuses:

- **In Progress** - timesheets that have been created, but not yet submitted. If a timesheet was submitted but then rejected, it will be displayed as In Progress status.
- **Submitted** - timesheets that have been submitted but are waiting for approval.
- **Approved** - timesheets that have been approved.

You can create timesheets for either your primary or secondary appointments based on the selected appointment in the **My Jobs** drop down. Before creating a timesheet, select the **My Jobs** link from the top right hand navigation bar and select the appropriate job appointment. Once the timesheet has been created, the Timesheets widget refreshes and the timesheet will be displayed.

Timesheet

View all in progress and submitted timesheets below. You can copy an existing timesheet, by selecting the line and clicking "Copy Previous Timesheet" button. To create a new timesheet from scratch, click the "Create New Timesheet" button. For any timesheets that are in progress, you can select the item in the grid, click the "Modify In Progress Timesheets" button and you will be able to edit the document.

Select	Pay Period Start Date	Pay Period End Date	Approver	Status
<input type="radio"/>	02/14/2013	02/14/2013	EMP-W-01A	In Progress
<input type="radio"/>	03/26/2013	03/26/2013	EMP-W-01A	Approved
<input type="radio"/>	03/27/2013	03/27/2013	EMP-W-01A	Approved

My Jobs

You can create timesheets for either your primary or secondary appointments based on the selected appointment in the **My Jobs** drop down. Before creating a timesheet, select the My Jobs link from the top right hand navigation bar and select the appropriate job appointment. The Job Status column displays whether or not the job appointment is Active. Once the timesheet has been created, the Timesheets widget refreshes and the timesheet will be displayed.

My Jobs

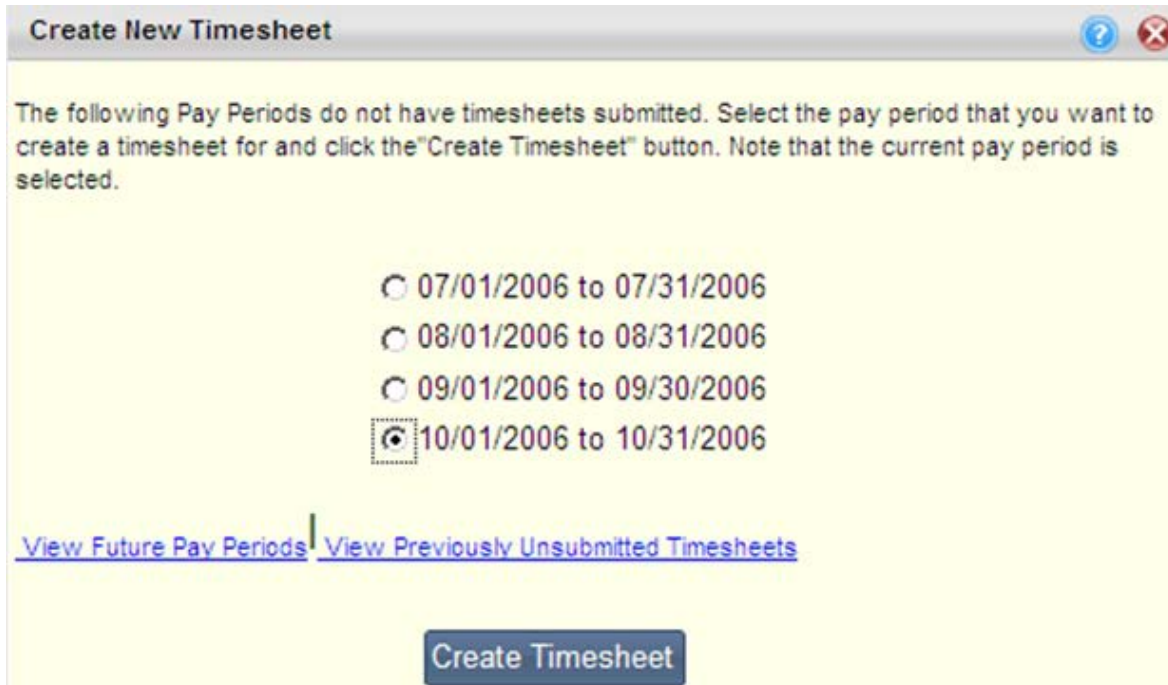
Select a job from the grid below to view information for your different roles. If you have any inactive roles, they are shown in italics.

Select	Primary	Department	Unit	Title	Job Status
<input checked="" type="checkbox"/>	Yes	Personnel	HRM Support	Payroll and Benefits Coordinator	Active
		Departent 100	Coaching	Girls Field Hockey Asst Coach	Active

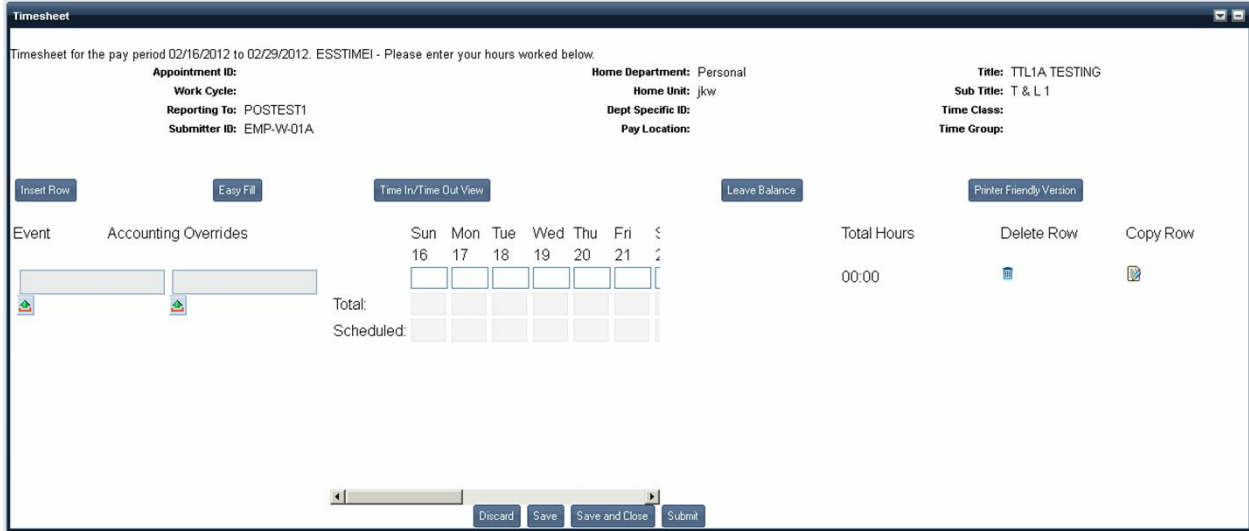
Create New Timesheet

The **Create New Timesheet** button allows you to create a new timesheet from scratch. To create a new timesheet, select the **Create New Timesheet** button. A popup window will open, displaying the four most recent pay periods (including the current pay period) for which timesheets have not been submitted.

Select the **View Future Pay Periods** link to display twelve more pay periods. Select the **View Previously Unsubmitted Timesheets** link to display a list pay periods for timesheets which are past due. Only timesheets that are past due are shown. Future dated timesheets that have not yet been submitted are not displayed in this section.



After selecting the pay period for which you would like to create a timesheet, select the **Create Timesheet button**. The Timesheet will be opened, allowing you to enter the necessary information.



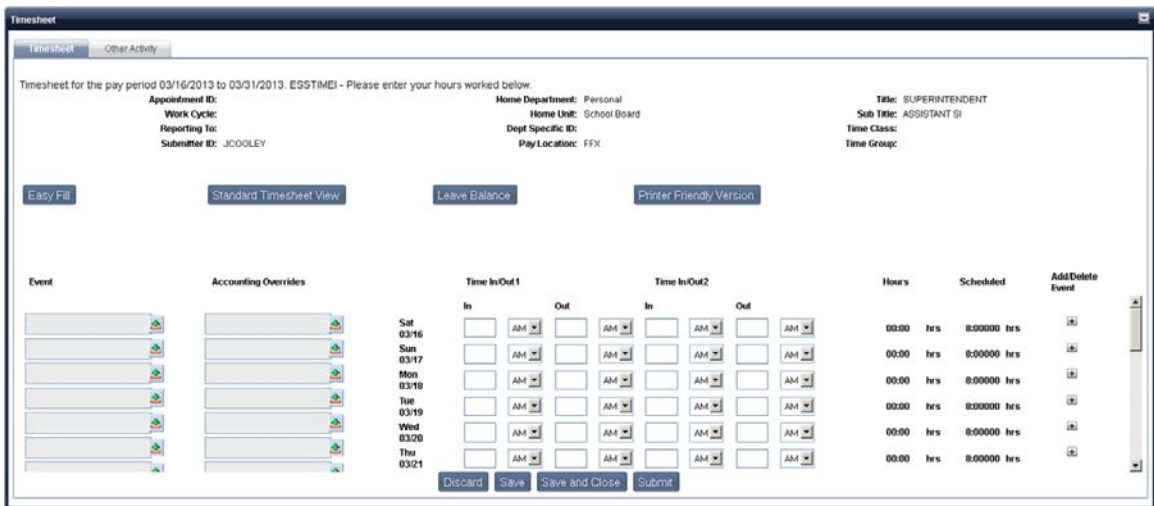
Timesheet Buttons

- **Easy Fill**

If the same amount of time is regularly applied to a certain event the Easy Fill button can be used to fill in all fields of the timesheet automatically.

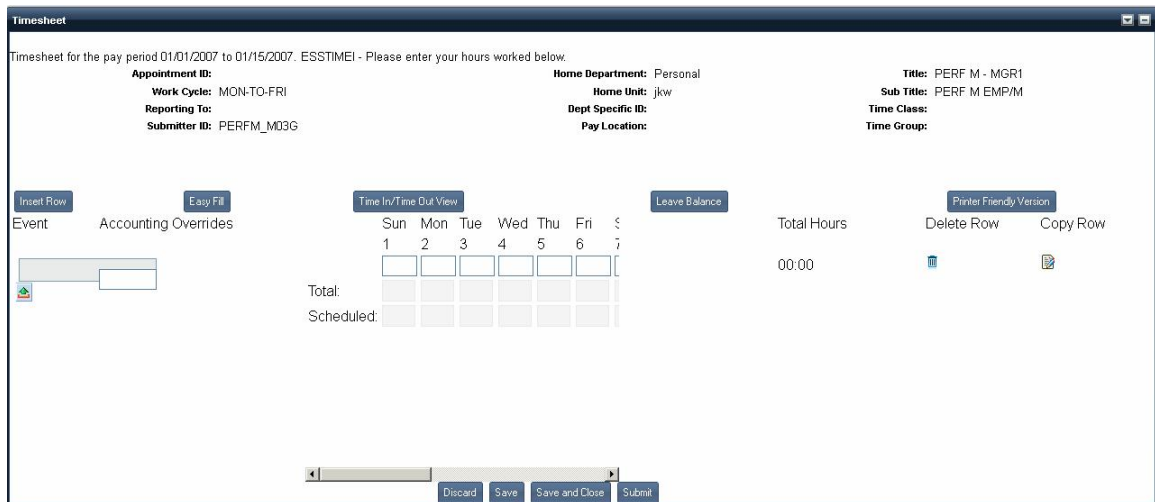
- **Time In/Time Out View**

Select the **Time In/Time Out** button to enter your Time In/Time Out shift information. You can enter four shifts for each day.



- **Event** - The Event Column allow you to select a pay event from the pick list and enter it on the timesheet. Multiple events can be added per day, by selecting the **Add/Delete Event** icon.
 - **Time In/Time Out 1** through **Time In/Time Out 4** - These columns allow you to enter Time In and Time Out values.
 - **Hours** - This **Hours** column contains a summation of the hours entered for each event on the specified day.
 - **Scheduled** - Displays the scheduled hours, based on your Work Schedule.
 - **Add/Delete Event** - This column displays a “+” icon for every day in the pay period. If you want to add an additional pay event on a specific day, select the plus icon. A new row will be added to the timesheet for the selected day, allowing you to enter information for that event. Select the Delete (trash can) icon to delete a row. Only rows that you have inserted will have the trash can icon available.
 - **Date** - Between the Overrides and the Time In/Time Out 1 column, the date for each line is displayed.
 - **Standard Timesheet View** button - select this button to change the view of the timesheet from Time In/Time Out view, back to Standard Timesheet view.
 - **Time Entry** - enter the time associated with the Event and select either AM or PM for standard time. Time entry can span multiple days. For instance, you can enter that you worked a shift from 8:00 p.m. on Monday to 4:00 a.m. on Tuesday and this time will be allocated as 8 hours of time entered across the two days. Your time in cases such as this should be entered as follows:
 - If a shift were to start at 8 p.m. on Mon., Aug. 2nd, the Time In punch should be entered as 8:00 p.m. in the Time In 1 field. No punch out should be entered on Aug. 2nd. The Out punch should be entered as 4:00 a.m. in the Time Out 1 field on Tues., Aug. 3rd. No Time In 1 punch should be entered prior to the Time Out 1 field on Tues., Aug. 3rd.
 - **Accounting Overrides** - Your HR Administrators can define accounting overrides for specific events at the Department, Unit, or Pay Policy level. These accounting overrides can be selected by you when creating the timesheet.
- **Standard Timesheet View**

After you have finished entering your Time In/Time Out shift information, you can select the **Standard Timesheet View** button to return to the standard view of the timesheet as shown below.



- **Leave Balance**

The **Leave Balance** button brings up a popup window containing current leave balances, maximum leave balances, accrual rates, and accrual frequencies. The window displays leave balance information using the current date (Month/Year) as the selection date. Additional links at the bottom of the Leave Balance pop up allow you to view your leave activity by date or to view your monthly leave accrual and usage.

Leave Balance Information ✕							
<u>Leave Balance</u>							
Category	Balance	Maximum Balance	Accrual Rate	Accrual Frequency	Amount Basis	Balance Type	Leave Year End Month
ANNUAL	221:00	200:00		Pay Period	Hour	Inception to Date	
ANNUAL LEAVE	470:00	200:00		Pay Period	Hour	Inception to Date	
LEAVE BANK	300:00	200:00		Pay Period	Hour	Inception to Date	
SICK LEAVE	197:00	200:00		Pay Period	Hour	Inception to Date	

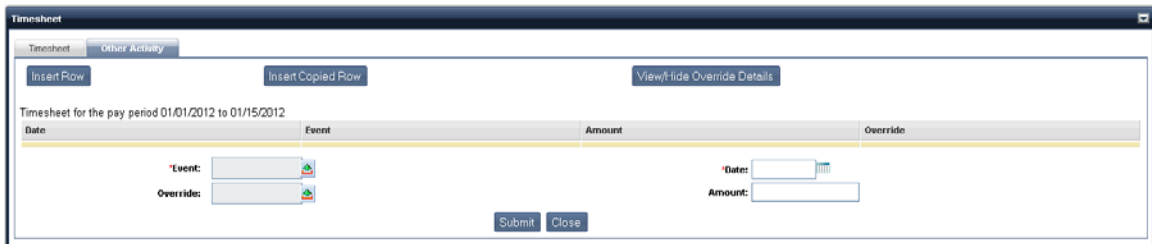
- [Printer Friendly Version](#)

The Printer Friendly Version button opens a window that displays the timesheet information in a format that can be printed to a local printer.

Timesheet Sections

There are three sections on the Timesheet:

- **Timesheet Details** - displays general information pertinent to the timesheet, including the job appointment for which this timesheet has been created and your job reporting information.
- [Other Activity](#) - allows you enter expanded timesheet information, such as overrides



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. Upon selecting the **Submit** button, you will receive a pop up message that allows you to enter any comments or to finalize the submission process by selecting Submit. If you do not agree to the terms on the timesheet submission pop up, select the **Go back to Timesheet** button and you will return to the timesheet without submitting it.

Copy Previous Timesheet

The Timesheets widget allows you to copy a previous timesheet. Simply select any previous timesheet using the radio buttons in the grid, then select the **Copy Previous Timesheet** button. The copied timesheet is opened and any Event and Override codes from the previous timesheet codes are copied to the new timesheet. No hours (leave or pay) are copied forward.

After selecting the pay period for which you would like to create a timesheet, select the **Create Timesheet** button. Copied timesheets are populated with the Event and Override codes from the timesheet which was copied.

You can create timesheets for either your primary or secondary appointments based on the selected appointment in the **My Jobs** drop down. Before creating a timesheet, select the **My Jobs** link from the top right hand navigation bar and select the appropriate job appointment. Once the timesheet has been created, the Timesheets widget refreshes and the timesheet will be displayed.

View/Modify In Progress Timesheets

The **View/Modify In Progress Timesheets** button allows you to see the details for a selected timesheet. Select the radio button next to the timesheet you would like to view or modify, then select the **View/Modify In Progress Timesheets**. 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.

Work Schedule

The following [widget](#) can be found on the Work Schedule sub tab:

- [Work Schedule and Upcoming Leave](#)

Work Schedule and Upcoming Leave

The Work Schedule and Upcoming Leave [widget](#) allows you to view your work and upcoming leave information. The Calendar displays Approved Leave (Green), Pending Leave (Yellow), Work Days (Blue), and Holidays (Red). You can also open a baseball card view to see leave information and work schedules.

Date	Type	Shift1	Shift2	Shift4	Total Hours
06/07/2013	Work Day	08:30 AM-12:00 PM	01:30 PM-04:30 PM	05:00 PM-06:00 PM	7:30
06/10/2013	Work Day	08:00 AM-12:00 PM	02:00 PM-06:00 PM		8:00
06/11/2013	Work Day	08:00 AM-12:00 PM	01:30 PM-04:30 PM	05:00 PM-06:00 PM	8:00
06/12/2013	Work Day	08:00 AM-12:00 PM	02:00 PM-06:00 PM		8:00
06/13/2013	Work Day	08:00 AM-12:00 PM	02:00 PM-06:00 PM		8:00

Work Schedule Calendar - Leave/Work Check Boxes

These check boxes allow you to choose to display leave request details, work schedule details, or both.

- **Leave** - When you select the **Leave** check box, the calendar displays Approved, Pending, and Routed Pending leave request details.
- **Work** - When you select the **Work** check box the calendar displays work days, holidays, and off days.
- **Both** - When you select both check boxes, leave request details and work schedule details are displayed.

Work Schedule Calendar - Holidays/Work Days/Off Days

Holidays are highlighted in red, scheduled work days are highlighted in blue, and off days are white.

Work Schedule Calendar - Multiple Leave Types in One Request

You can apply for a leave request with multiple leave types on the same day using a single leave request. In this case, when you open the baseball card view for that day, all the leave types on that leave request are displayed.

Compensation Tab

The Compensation tab allows you to view information related to your pay, deductions, and tax information. The following [widgets](#) can be found on the Compensation tab:

- [Issued Checks/Advices](#)
- [Tax Information](#)
- [Pay and Deduction Summary](#)
- [Tax Levies and Garnishments](#)
- [Direct Deposit Wizard](#)
- [Electronic W-2](#)
- [Paycheck Calculator](#)

Issued Checks/Advices

The Issued Checks/Advices [widget](#) displays a listing of Issued Checks and Advices, including sections that display the Disposition Information and Pay Summary Information. Select the View icon on the line of the Check/Advice to download a PDF version. Select the **View Pay and Deduction Details** button to view detailed pay, deduction, and fringe information about the Check/Advice.

Issued Checks/Advices

This page allows you to download paystubs and view Issued Checks/Advices.

Appointment ID	Check Date	Type of Check	Gross Pay Amount	Total Deductions Amount	Net Pay Amount	Disposition	Disposition Date	Download
	01/15/2010	Regular	1923.08	50.00	1873.08	Outstanding Payment	11/26/2012	
	02/15/2010	Regular	1923.08	50.00	1873.08	Outstanding Payment	11/26/2012	
	06/03/2013	Pay Type Supplemental	0.00	0.00	0.00	Cleared Payment	06/03/2013	

Disposition Information

Appointment ID :	Type of Check : Regular
Check Date : 01/15/2010	Combined Check : 0
Bank Account : 005	Disposition : Outstanding Payment
Bank Name : Jenn Ahn's Bank	Disposition Date : 11/26/2012
Check Number : 12345678990	

Payment Summary Information

Payroll Number : SEMI-MONTHLY	Gross Pay Amount : 1923.08
Title : TEST	Total Deductions Amount : 50.00
	Net Pay Amount : 1873.08
	FICA Wage : 0.00
	Fringe Benefits : 0.00

[View Pay and Deduction Details](#)

Tax Information

The Tax Information [widget](#) displays your tax information, including the Tax Year, Tax Form, and Federal Tax ID. The Tax Year field allows you to select the tax year from the drop down. There are two versions of the Federal W4, one for prior to the year 2020 and one for 2020 year. Bases on your Tax Year field selection the system opens the respective Federal W4 form. The View icon allows you to open or save a PDF version of the selected tax form. This widget also contains buttons that allow you to create a Federal W-4 form or to modify your Tax Withholdings/Allowances.

Tax Information ⌵ ⌵

CTAXINF - View your tax forms, request duplicates and create W-4 forms from this widget. Additionally, you can view your Tax Withholdings/Allowances.

Tax Year: ⌵

View and Request Duplicate Tax Forms

Tax Year	Tax Form	Federal Tax ID	View

ESSTAXA - I would like a duplicate copy of the highlighted Tax Form. Please use this functionality if you are unable to print the attached PDF Tax Form on your own. A confirmation email will be sent to your email address upon successful receipt of the duplicate request.

Request a Duplicate Copy of a Tax Form

If you would like a duplicate copy of a tax form and are unable to download or print the tax form on your own, you can request that a duplicate copy be printed and sent to you. To request this duplicate copy, select the check box at the bottom of the page, indicating your request and select the **Submit** button. Upon submitting your request, an HR administrator will be notified that a duplicate copy is required. You will also receive an email notification that your request has been sent.

Note: If you have more than one tax form that needs to be duplicated, you must submit a separate duplicate copy request for each individual form.

Create Federal W-4

Select the **Create Federal W-4** button to open a pop up window that allows you to file out an online Federal W-4 form. Follow the instructions on the page, select the acknowledgement check box at the bottom of the page, and then select **Submit**.

Prior to the year 2020 Federal W-4

Federal W-4 ? X

CFEDW41 - Complete your Federal W-4 form by filling out and verifying the information below. In order to view the Form W-4 worksheet for detailed information, click the following link: <http://www.irs.gov/pub/irs-pdf/fw4.pdf>

Employee Information

First Name : Santhosh	Home Address :
Middle Initial :	City/Town :
Last Name : Kumar	State :
Social Security Number :	Zip Code :
First Date of Employment : 2018-01-01	

Withholding Tax Information

CFEDW42 - All information in the following section must be filled out accurately and completely.

Last W-4 File Date : 11/20/2019

*Federal Tax Marital Status :

Note: If married filing separately, check "Married, but withhold at higher Single rate" if available OR "Single"

Total number of allowances you are claiming :

From the applicable worksheet at the following link: <http://www.irs.gov/pub/irs-pdf/fw4.pdf>

Additional amount, if any, you want withheld from each paycheck :

I claim exemption from withholding for 2019, and I certify that I meet both of the following conditions for exemption:
 Last year I had a right to a refund of all federal income tax withheld because I had no tax liability.
 This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.

If you meet both conditions, select "Exempt" from the drop down list.

If your last name differs from that shown on your social security card, check here :
 You must call 1-800-772-1213 for a new card.

Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS

Employer Information

Employer Name : American Management Systems	Employer Identification Number (EIN) : 3456789
4000 Legato Rd	
Employer Address : Fairfax, HI 22341-1111	Office Code :

Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete. (Form is not valid unless you electronically sign it by selecting this checkbox and selecting the Submit button)

Submit

For 2020 Federal W4 form

Tax Withholdings/Allowances

Select the **Tax Withholdings/Allowances** button to view your tax withholdings and allowances.

Tax Withholdings/Allowances
? X

Appointment ID	Federal Tax Marital Status	State Tax Marital Status	Federal Tax Allowance	State Tax Allowance	Additional State Tax Allowance	From	To																																										
<div style="margin-bottom: 15px;"> <h3><u>General Information</u></h3> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">Appointment ID :</td> <td style="width: 50%;">FICA Class :</td> </tr> <tr> <td>From :</td> <td>Last W-4 File Date :</td> </tr> <tr> <td>To :</td> <td>Date of Last Electronic Submission :</td> </tr> <tr> <td>Tax Class :</td> <td></td> </tr> </table> </div> <div style="margin-bottom: 15px;"> <h3><u>Federal Tax Information</u></h3> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">Federal Tax Marital Status :</td> <td style="width: 50%;">Federal Tax Allowance :</td> </tr> <tr> <td>Dependents :</td> <td>Multiple Jobs : <input type="checkbox"/></td> </tr> <tr> <td>Other Income :</td> <td>Deductions :</td> </tr> </table> </div> <div style="margin-bottom: 15px;"> <h3><u>Additional Federal Withholdings</u></h3> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr style="background-color: #f2f2f2;"> <th style="width: 15%;">Type</th> <th style="width: 15%;">Plan</th> <th style="width: 15%;">Amount</th> <th style="width: 15%;">Percent</th> <th style="width: 15%;">From</th> <th style="width: 15%;">To</th> </tr> </thead> <tbody> <tr> <td colspan="6" style="height: 40px;"> </td> </tr> </tbody> </table> </div> <div style="margin-bottom: 15px;"> <h3><u>State Tax Information</u></h3> <table style="width: 100%; border: none; margin-top: 5px;"> <tr> <td style="width: 50%;">State Tax Marital Status :</td> <td style="width: 50%;">State Tax Allowance :</td> </tr> <tr> <td></td> <td>Additional State Tax Allowance :</td> </tr> </table> </div> <div style="margin-bottom: 15px;"> <h3><u>Additional State and Localities Withholdings</u></h3> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr style="background-color: #f2f2f2;"> <th style="width: 15%;">Type</th> <th style="width: 15%;">Plan</th> <th style="width: 15%;">Amount</th> <th style="width: 15%;">Percent</th> <th style="width: 15%;">From</th> <th style="width: 15%;">To</th> </tr> </thead> <tbody> <tr> <td colspan="6" style="height: 40px;"> </td> </tr> </tbody> </table> </div>								Appointment ID :	FICA Class :	From :	Last W-4 File Date :	To :	Date of Last Electronic Submission :	Tax Class :		Federal Tax Marital Status :	Federal Tax Allowance :	Dependents :	Multiple Jobs : <input type="checkbox"/>	Other Income :	Deductions :	Type	Plan	Amount	Percent	From	To							State Tax Marital Status :	State Tax Allowance :		Additional State Tax Allowance :	Type	Plan	Amount	Percent	From	To						
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Type	Plan	Amount	Percent	From	To																																												
State Tax Marital Status :	State Tax Allowance :																																																
	Additional State Tax Allowance :																																																
Type	Plan	Amount	Percent	From	To																																												

Pay and Deduction Summary

The Pay and Deduction Summary [widget](#) displays your pay and deduction summaries and allows you to search by **Year From**, **Year To**, **Tax Entity ID**, **Pay Type**, **Fringe Pay Type**, **Pay Category**, and **Deduction Category** by using the **Search** link.

Pay and Deduction Summary ☰ ☒

View Pay and Deduction Summary information on this widget. Choose a line in the grid below to view different years or search to refine your selection.

Search

Pay Summary

Deduction Summary

Year	Tax Entity ID	Pay Type	Fringe Pay Type	Pay Category	Annual Amount	Q1	Q2	Q3	Q4
2012	010		N	REG PAY	2,885.72	2885.72	0.00	0.00	0.00
2012	010		N	ANL PAY	369.96	369.96	0.00	0.00	0.00
2012	010		Y	EMPR FRINGE	0.00	0.00	0.00	0.00	0.00

Deduction Summary


The Deduction tab summarizes the years you have worked for your organization and your deductions during each of those years. Select a line from the list to display the details of your deductions for the selected year.

Tax Levies and Garnishments

The Tax Levies and Garnishments [widget](#) displays a listing of the tax levies and garnishments being taken from your paycheck. These are listed by **Deduction Type**, **Amount Due**, and **Amount Paid**. Select the **View** icon on the line of a levy or garnishment to display detailed information for the garnishment or tax levy.

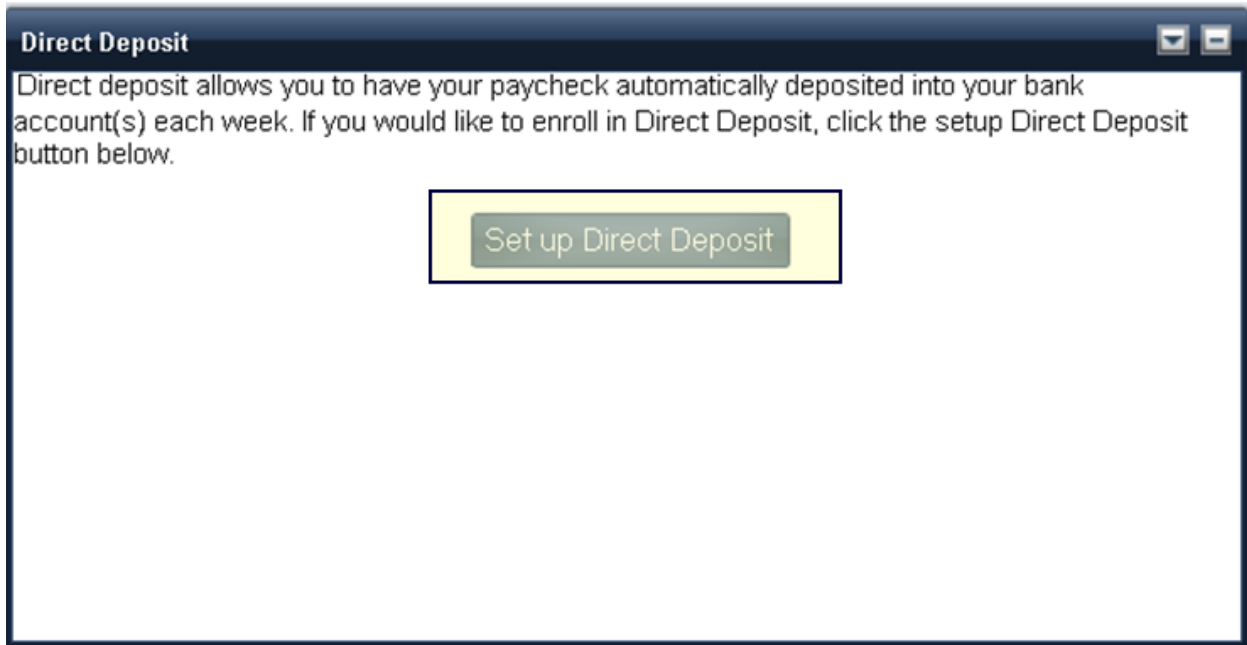
Tax Levies and Garnishments ⌵ ⌵

On this screen, you can view information pertaining to Tax Levies and Garnishments that are being deducted from your paycheck. For more details, click on the View icon to see additional information.

Deduction Type	Amount Due(\$)	Amount Paid(\$)	View
GARN	10000.00	1000.00	

Direct Deposit

The Direct Deposit [widget](#) is used to launch the Direct Deposit Wizard, which allows you to direct your net pay to multiple bank accounts. Select the **Set up Direct Deposit** button to launch the Direct Deposit Wizard. Use this wizard to allocate your net pay across one or more bank accounts with a schedule of your choice. For instance, you can set the schedule to every pay period, every other pay period, 1st pay period of every month, and 1st and 2nd pay period of every month. You can also submit your distribution preferences for both percentage and fixed amount shares of net pay.



Set up Direct Deposit

Select the **Set up Direct Deposit** button to launch the Direct Deposit Wizard. The Direct Deposit Wizard contains the following sections:

- **Primary Account**

The **Primary Account** section displays the primary account information for your net pay distributions. A **Primary Account** is the account you designate as the one which receives all the unassigned pay. Only one primary account can exist for any given date.

Secondary Account

If you would like to enroll a secondary account to receive direct deposit, you can fill out the optional section below.

ABA Routing Number	Account Number	Distribution Percent	Distribution Amount	Delete	Copy

Add Additional Account

Account Type:

***Deduction Frequency:**

ABA Routing Number: ?

Account Number: ?

Nickname:

Priority Order:

Check/Paystub Routing:

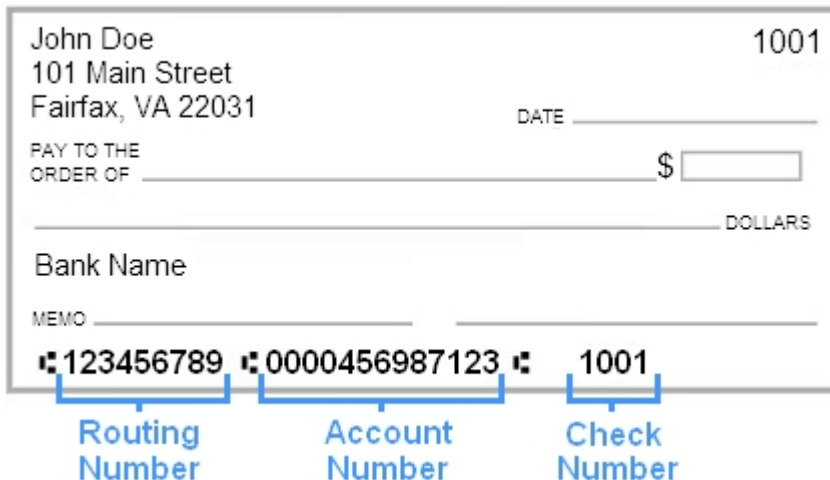
Distribution Percent:

Distribution Amount:

Attachments:

Delete Account:

The ABA Routing Number and Account Number are located on your check as indicated below:



- **Secondary Account**

A **Secondary Account** is optional. You can have a maximum of nine secondary accounts. Select the **Add Additional Account** button and enter the account details for each Secondary account.

An attachment can be added to the Primary Account and/or Secondary Account(s) using the **Browse** button to locate the file to be attached. The following are the key options you can define for each secondary account:

- **Priority Order** - Secondary accounts are assigned a Priority Order. The Priority Order determines the hierarchy by which the system allocates pay if the Paycheck does not contain enough Net Pay to distribute to all of the designated accounts. The account with a Priority Order of 1 will have the highest priority. No two accounts can share the same priority order with overlapping date ranges.
- **Distribution Amount or Percent** - Each secondary account is also assigned either a Distribution Amount (a fixed dollar amount per Pay Period) or a Distribution Percent. The total Distribution Percent from all secondary accounts for any date range cannot exceed 100%.
- **Deduction Frequency** - A secondary account can also be assigned a **Deduction Frequency**. Accounts with a **Deduction Frequency** only receive direct deposits in Pay Periods linked to the **Deduction Frequency** code entered. This functionality allows for flexible deposit schedules. For example, if you are paid bi-weekly and the **Deduction Frequency** for a secondary account is monthly, you will be paid out once a month to this secondary account. The Primary account will be paid every pay period.

Secondary Account

If you would like to enroll a secondary account to receive direct deposit, you can fill out the optional section below.

ABA Routing Number	Account Number	Distribution Percent	Distribution Amount	Delete	Copy

Add Additional Account

Account Type:

***Deduction Frequency:**

ABA Routing Number: ?

Account Number: ?

Nickname:

Priority Order:

Check/Paystub Routing:

Distribution Percent:

Distribution Amount:

Attachments:

Delete Account:

The ABA Routing Number and Account Number are located on your check as indicated below:

The diagram shows a check form with the following fields and values:

- Payor: John Doe, 101 Main Street, Fairfax, VA 22031
- Check Number: 1001
- DATE: _____
- PAY TO THE ORDER OF: _____ \$ _____ DOLLARS
- Bank Name: _____
- MEMO: _____
- ABA Routing Number: 123456789
- Account Number: 0000456987123
- Check Number: 1001

Blue brackets and labels below the check identify the ABA Routing Number (123456789), Account Number (0000456987123), and Check Number (1001).

Net Pay Distributions can be allocated by either a percentage or a set dollar amount. For dollar base allocations, distributions to the secondary accounts are first fulfilled prior to distributing money to the primary account. Secondary accounts only receive the allocated distribution amount if the full amount for that account is available. For percent based allocations, the total percentage allocation for secondary accounts does not have to add up to 100%. The total can be less than 100% but not more than 100%. If the total percentage is less than 100%, the remaining amount will go to the Primary Account. No partial amounts or percentages can be distributed to secondary accounts.

Refer to the following examples for more information on how this processing works.

Dollar Based Distribution Examples

For these examples, the accounts are setup as follows:

- Primary Account (no amount/percent is specified for the primary account)
- 1st Secondary Account - \$300
- 2nd Secondary Account - \$250
- 3rd Secondary Account - \$200

Example 1 - Enough money to distribute to all Secondary accounts

You have \$1000 to distribute. In this example, the 1st Secondary account receives \$300, the 2nd Secondary account receives \$250, the 3rd Secondary account receives \$200, and remaining amount of \$250 goes to the Primary account.

Example 2 - Not enough for 1st Secondary, 2nd Secondary, or 3rd Secondary

You have \$195 to distribute. There is not enough money to fulfill the allocation requirement for the 1st Secondary account, so that account receives zero. There is not enough money to fulfill the allocation requirement for the 2nd Secondary account, so that account receives zero. There is not enough money to fulfill the allocation requirement for the 3rd Secondary account, so that account receives zero. The Primary account gets the full \$195.

Example 3 - Not enough to make 1st Secondary, but enough for 2nd Secondary, not enough for 3rd Secondary

You have \$295 to distribute. There is not enough money to fulfill the distribution allocation to the 1st Secondary account so that account receives zero. There is enough money to fulfil the requirement for the 2nd Secondary account, so that account receives \$250. This leave \$45, which is not enough for the 3rd Secondary account, which receives zero. Therefore, the Primary account gets the remaining \$45.

Percentage Based Distribution Examples

For these examples, the accounts are setup as follows:

- Primary Account (no amount /percents specified for the primary account)
- 1st Secondary Account - 50%
- 2nd Secondary Account - 25%
- 3rd Secondary Account - 10%

Example 1 - Enough for 1st, 2nd, and 3rd Secondary account

The total percentage allocation for secondary accounts does not have to add up to 100%. Therefore, if you have \$1000 to distribute, the 1st Secondary account in this example will receive 50% of the original net pay amount, which is \$500. The 2nd Secondary Account receives 25% of the original net pay amount, which is \$250. This leave \$250. The 3rd Secondary Account receives 10% of the original net pay amount, which is \$100. There is now \$150 remaining, which goes to the Primary account.

Mixed Dollar Based and Percentage Based Distribution Examples

For this example, the accounts are setup as follows:

- Primary Account (no amount/percent is specified for the primary account)
- 1st Secondary Account - 50%
- 2nd Secondary Account - \$200
- 3rd Secondary Account - 10%

Example 1 - Enough for all Secondary Accounts

You have \$1000 to distribute. The 1st Secondary account is allocated at 50% of the original net pay amount, so this account gets \$500. The 2nd Secondary account then gets \$200. This leaves \$300. The 3rd Secondary account is allocated at 10% of the original net pay amount, so this account receives \$100, and the Primary account receives the remaining \$200.

Submitting Accounts

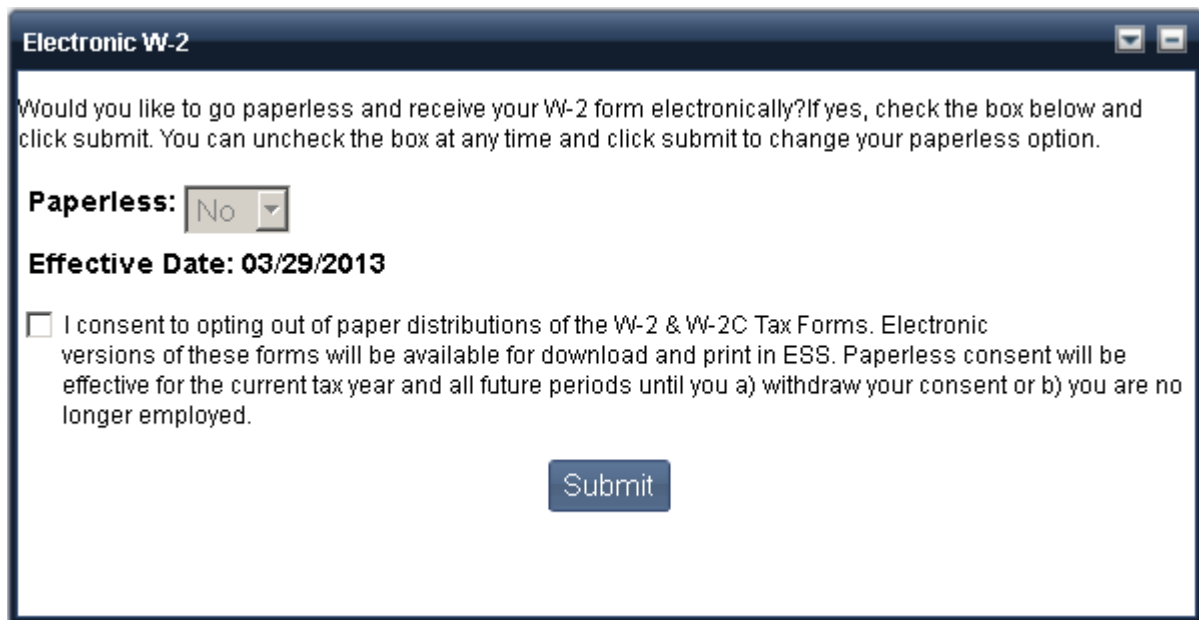
Once you have added all the information for your primary and secondary accounts, select the **Submit** button to complete the Direct Deposit Wizard. All accounts will then be added, updated, or deleted as specified during the wizard session. You can re-enter the wizard to review your deposit schedule without making any changes.

Electronic W-2

The Electronic W-2 [widget](#) allows you to select whether or not you would like to receive your W-2 and W-2C Tax Forms electronically rather than receiving a paper distribution of the forms. To opt out of receiving the paper distribution, set the **Paperless** option to *Yes*, select the check box giving your consent to opting out of paper distributions of W-2 and W-2C Tax Forms, and select the **Submit** button.

After submitting your consent to opt out, you will receive a message that your Paperless consent option has been updated and the Effective Date on the Electronic W-2 widget will be updated with the date you submitted your consent. Once the **Paperless** option is selected, you will no longer receive a paper copy of your W-2 Tax Form. However, a PDF version of your form will still be available for you to view, print, or download as needed.

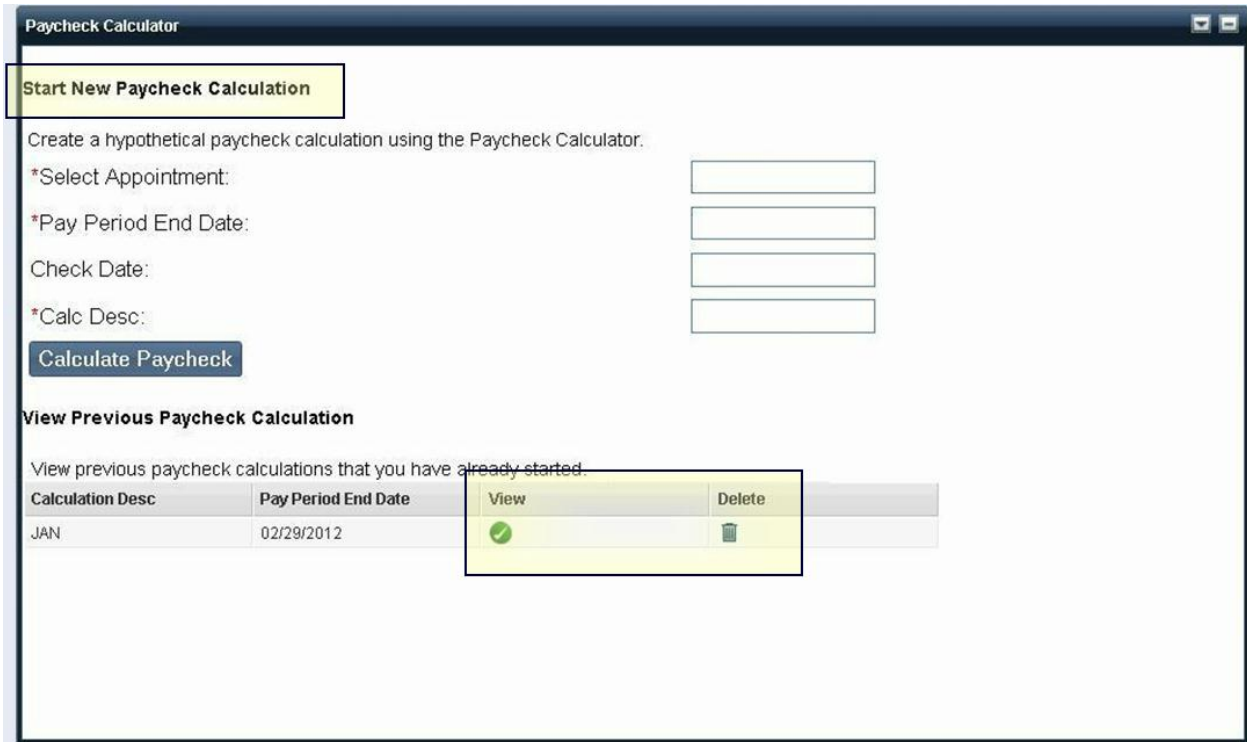
If you wish to change the Paperless option back so that you will once again receive paper versions of your tax forms, simply set the **Paperless** option back to *No*, clear the consent check box and select the **Submit** button. Beginning with the next tax year, you will begin receiving the paper distribution once again.



The screenshot shows a window titled "Electronic W-2" with a close button and a help icon. The text inside the window reads: "Would you like to go paperless and receive your W-2 form electronically? If yes, check the box below and click submit. You can uncheck the box at any time and click submit to change your paperless option." Below this text, there is a label "Paperless:" followed by a dropdown menu currently set to "No". Underneath, it says "Effective Date: 03/29/2013". A checkbox is present, which is currently unchecked. The text next to the checkbox reads: "I consent to opting out of paper distributions of the W-2 & W-2C Tax Forms. Electronic versions of these forms will be available for download and print in ESS. Paperless consent will be effective for the current tax year and all future periods until you a) withdraw your consent or b) you are no longer employed." At the bottom center of the window is a blue "Submit" button.

Paycheck Calculator

The Paycheck Calculator [widget](#) allows you see the impact of changing salary, timesheet, deduction, or tax information will have on your pay check by allowing you to calculate a mock paycheck. This widget also displays previous pay check calculations.



Start New Paycheck Calculation

Enter the information in the Start New Paycheck Calculation necessary to calculate a pay check. Select the **Calculate Pay Check** button to calculate how modifying your pay and benefit information will effect the amount of your paycheck. Your results will be displayed in the **View Previous Pay Check Calculation** section of the widget.

To start a new paycheck calculation, perform the following steps, enter a **Pay Period End Date** and a **Calculation Description** in the Start New Paycheck Calculation section. The Calculation Description is a textual description to help identify the differences between various Paycheck Calculations that were entered on the Paycheck Calculator page. The **Check Date** field is derived based on the **Pay Period End Date** that is chosen. When you select the **Calculate Paycheck** button, the calculation occurs and the information in the Paycheck Calculator widget is populated. The Paycheck Calculator automatically populates the widget with the current pay data for the selected pay period. Select the View icon on the line of the paycheck calculation to view the details of that calculation.

View Previous Paycheck Calculation

The **View Previous Paycheck Calculation** section displays a list of previously calculated paychecks. Select the View icon on the line of a paycheck calculation to view the details of that calculation. The Paycheck Summary section displays the results of the calculated check at a summary level. This section shows the totals for Pay, Deductions, Fringes, Net Pay, FICA Wages, and Reimbursables.

Select the **View Pay and Deduction Details** button to display pay details, deduction details, and fringe details for the calculated pay check.

Calculated Paycheck ✖

Paycheck Summary

Paycheck Summary details are listed below. You can click the Recalculate button to redo the calculation after you have changed pay and deduction details.

Appointment ID:	Total Pay: \$0.00
Calculation Description:	Total Deductions: \$0.00
Pay Period End Date: 01/31/2011	Net Pay: \$0.00
Check Date: 01/31/2011	FICA Wages: \$0.00
Combined Check: <input checked="" type="checkbox"/>	Total Fringe: \$0.00
	Reimbursable: \$0.00

View Pay and Deduction Details
Recalculate

Change Pay/Deduction Details

You can change pay and deduction details using the buttons below in order to see how changes will impact your future paychecks.

Pay:	Change Salary	Change Timesheet Details	Add Non-Eligible Pay
Deductions:	Change Deductions/Benefits	Change Tax Rules	Add Non-Eligible Deductions/Benefits

You can use the buttons in the Change Pay/Deduction Details section to see how modifications to different areas will impact your future paychecks. Using these buttons you can add or modify salary, timesheet (pending pay) details, tax rules, and benefit/deduction information, as well as add earnings or deductions for which your current pay/deduction policy is not eligible.

Note: Changing information using these buttons does not change actual payroll information. This data is simply copied from actual payroll data for the purpose of seeing the effect of the changes on your paycheck.

Select the options below for more information on each button in this section.

- **Change Salary**

The Salary page automatically populates with your base salary information and any other active pay parameters. To make changes, enter data in the Pay Event Type, Amount/Percent Indicator, Amount, Percent, From, To, Increase/Decrease ID and Percentage Inc/Dec fields and select the **Save** button. Select the **Back** button to return to the Calculate Paycheck Summary page.

Change Salary ✖

[Back](#)

Change salary parameters to see how your paycheck will be impacted.

Appointment ID	Pay Event Type	Amount/Perce	Amount Basis ID	Amount	Percent	% Increase /Decrease	From	To	Delete	Copy
	REGULAR PAY	Amount	Annual Salary	500.0000			01/01/2013	12/31/9999		

[Insert](#)

Appointment ID:

*Pay Event Type:

Amount/Percent Indicator:

Amount Basis ID:

Amount:

Percent:

*From:

To:

Increase/Decrease ID:

Percent Inc/Dec:

Hourly Pay Rate:

Daily Pay Rate:

Weekly Pay Rate:

Monthly Pay Rate:

Annual Pay Rate:

Pay Period Pay Rate:

[Save](#)

- **Change Timesheet Details**

The Timesheet Details page automatically populates with any pending pay records for the selected pay period. Your paycheck is then calculated with this pay and deduction information. To make changes, enter data in the Appointment ID, Event Date, Pay Type, Pay Rate and Hours/Amount fields and select the **Save** button. Select the **Back** button to return to the Calculate Paycheck Summary page.

Timesheet Details ✖

[Back](#)

Change timesheet details to see how your paycheck will be impacted.

Appointment ID	Pay Event Type	Pay Rate	Input Amount	Dollar Amount	Event Date	Delete	Copy
	REG PAY	33.0000	10:00	330.00	05/31/2013		
1	REG PAY	20.0000	4:00	80.00	05/04/2013		
1	REG PAY	20.0000	2:30	50.00	05/18/2013		

[Insert](#)

Appointment ID:

*Pay Event Type:

*Event Date:

Pay Rate:

*Hours/Amount:

[Save](#)

- **Add Non-Eligible Pay**

The Non-Eligible Pay window is initially blank when the **Calculate Paycheck** link is selected. Pay for which you are not currently eligible (based on pay policy assignments) can be added here for calculation purposes. Adding pay information to these pages does not change actual pay information. It is added here simply to see what impact these changes may make on a paycheck. After making your changes, select **Save** to include these changes in the paycheck calculation. Select the **Back** button to return to the Calculated Paycheck Summary page.

Non-Eligible Pay ✖

Back

PCNEPAY - Add pay events that you are not currently eligible for to see how your paycheck will be impacted.

Appointment ID	Pay Type	Dollar Amount	Event Date	Delete	Copy
	PAID OVERTIME	400.00	03/12/2013	🗑	📄
A	O/T PR	80.00	04/01/2013	🗑	📄
B	REGLR	70.00	03/31/2013	🗑	📄

Insert

Appointment ID:

*Pay Event Type: PAID OVERTIME

* Event Date:

* Dollar Amount:

Save

- **Change Deductions/Benefits**

The Benefits and Deductions page is automatically populated with information from your benefit and deduction parameters records when the **Calculate Paycheck** button is selected. Information on these pages can be added, removed, and modified to determine the effect the change will have on your paycheck. Changing this information does not change actual payroll information. This data is simply copied from actual payroll data for the purpose of seeing the effect of the changes on your paycheck. To make changes, enter data in the Appointment ID, Deduction Type, Deduction Plan, From, To, Override Deduction Amount and Override Deduction Percent fields and select the **Save** button. Select the **Back** button to return to the Calculated Paycheck Summary page.

Benefits and Deductions

Back

Change your benefits and deductions to see how your paycheck will be impacted.

Appointment ID	Deduction/Benefit Type	Deduction/Benefit Plan	Override Deduction/Benefit Amount	Override Deduction/Benefit Percent	From	To	Delete	Copy
99999	NET PAY	NET PAY	20.00	0.000000	05/01/2013	05/31/2013		
99999	NET PAY	NET PAY	25.00	0.000000	06/01/2013	12/31/9999		
CSP- EMPLOYEE	TEST CSP02	TEST CSP02	0.00	0.000000	04/01/2013	04/30/2013		
CSP- EMPLOYEE	TEST CSP02	TEST CSP02	10.00	0.000000	05/01/2013	05/31/2013		
CSP- EMPLOYEE	TEST CSP02	TEST CSP02	12.00	0.000000	06/01/2013	06/30/2013		
CSP- EMPLOYEE	TEST CSP02	TEST CSP02	20.00	0.000000	07/01/2013	12/31/9999		

Insert

Appointment ID :

*Deduction/Benefit Type :

*Deduction/Benefit Plan :

Benefit Type Class Desc:

Benefit Type Sub Class Desc:

Benefit Plan Class Desc:

* From:

To:

Override Deduction/Benefit Amount:

Override Deduction/Benefit Percent:

Employee Override Allowed:

Deduction Amount:

Deduction Rate:

Save

- **Change Tax Rules**

The Tax Rules page is automatically populated with information from your tax parameter records, which is effective as of the entered Pay Period End Date, when the **Calculate Paycheck** button is selected. Information on these pages can be added, removed, and modified to determine the effect the change will have on your paycheck. Changing this information does not change actual payroll information. This data is simply copied from actual payroll data for the purpose of seeing the effect of the changes on your paycheck. To make changes, enter data in the Appointment ID, Tax Class, FICA Class, Marital Status - Federal, Marital Status - State, Dependents, Other Income, From, To, Tax Allowance - Federal, Tax Allowance - State, Tax Allowance - Additional State, Multiple Jobs check box, and Deductions fields and select the **Save** button. Select the **Back** button to return to the Calculated Paycheck Summary page.

✖
Tax Rules

Back

PCTAX - Change tax rules to see how your paycheck will be impacted.

Remember to Save prior to pressing Back.

Appointment ID	Tax Class	FICA Class	Marital Status - Federal	Marital Status - State	Delete	Copy
					🗑	📄

Insert

Appointment ID:

*Tax Class:

*FICA Class:

Marital Status-Federal:

Marital Status-State:

Dependents:

Other Income:

* From:

To:

Tax Allowance-Federal:

Tax Allowance-State:

Tax Allowance-Additional State:

Multiple Jobs:

Deductions:

Save

- **Add Non-Eligible Deductions/Benefits**

The Non-Eligible Deductions/Benefits window is initially blank when the **Calculate Paycheck** link is selected. Deductions and benefits for which you are not currently eligible (based on deduction and benefit policy assignments) can be added here for calculation purposes. The Non-Eligible Deductions/Benefits page contains the deduction and tax parameter entries that are effective as of the entered **Pay Period End Date**. Adding deduction/benefit information to these pages does not change your actual deduction/benefit information. It is added here simply to see what impact these changes may make on a paycheck.

To make changes, enter data in the Appointment ID, Deduction Type, Deduction Plan, From, To, Override Deduction Amount and Override Deduction Percent fields and select the Save button. Select the **Back** button to return to the Calculated Paycheck Summary page.

Once you have made all your changes using these buttons, select the **Recalculate** button to recalculate the paycheck using your recent changes.

Delete Previous Paycheck Calculation

To remove a paycheck calculation from the list in the View Previous Paycheck Calculation section, simply select the Delete icon on the line of the calculation you wish to remove.

Benefits Tab

The Benefits tab allows you to view/modify information regarding your benefits enrollments, dependents, and beneficiaries. The Benefits tab consists of the following sub tabs:

Information

The following [widgets](#) can be found on the Information sub tab:

- [Enrollments](#)
- [Dependents](#)
- [Dependent Benefits](#)
- [Employee Benefits and Deductions](#)
- [Beneficiaries](#)
- [Paycheck Calculator](#)

Enrollments

The Enrollments [widget](#) displays your **Current**, **Future**, and **Past** Enrollments tabs, allowing you to view the changes that were made to benefits enrollment through the Benefits Enrollment Wizard, such as the dollar amount enrolled in flexible spending accounts, the total cost of dollar-based benefits and deductions, the total cost of percent-based benefits and deductions, your dependents that are covered for particular benefits, benefits that were waived during the enrollment, or deductions that were unenrolled during the enrollment process.

Each tab contains Benefits Enrollment, Personal Deduction, and Dependent Benefits Coverage sections. Please refer to the [Benefits Enrollment Wizard](#) widget for detailed information on enrolling into benefits.

Details pertaining to each section are described below:

- ***Benefit Enrollments***

The **Benefit Enrollments** section contains information related to the benefits in which you are enrolled (either active or inactive enrollments).

- ***Personal Deductions***

The Personal Deductions section contains your personal deductions (either active or inactive), for example a credit union or charity deduction.

- ***Dependent Benefit Coverages***

The **Dependent Benefit Coverages** section contains information related to the benefit coverages in which your dependents are enrolled, (either active or inactive):

- Active Dependent Benefit Coverages - contains information related to dependents with active benefit coverages, including those dependent coverages existing prior to the completion of the Benefits Enrollment Wizard (whether changed or not) and those dependent coverages added through the ESS Enrollment Wizard.

- Inactive Dependent Benefit Coverages - contains information related to dependents whose benefit coverages have been terminated through the ESS Enrollment Wizard.

Enrollments

BENRLS - View current, future and past benefit and deduction enrollments on this screen.

Benefits Enrollments

Benefit Type	Plan	Goal Amount	Amount	Percent	Primary Care Physician	Payroll From	Payroll To	Cafeteria	Coverage From	Coverage To
DENTAL	DP1	0	0.00	0.000000		01/01/2017	12/31/9999	Yes	01/01/2017	12/31/9999
GENERAL MED	ACA	0	0.00	0.000000		01/01/2017	12/31/9999	No	01/01/2017	12/31/9999

Personal Deductions

Type	Plan	Goal Amount	Amount	Percent	Primary Care Physician	Cafeteria	From	To
------	------	-------------	--------	---------	------------------------	-----------	------	----

Dependent Benefits Coverage

Dependent ID	Dependent Name	Type Class	Type Sub Class	Benefit Class	Primary Care Physician	Cafeteria	Coverage From	Coverage To
0000096180	john bailey	DENTAL BEN	DENTAL	007-FAM		No	01/01/2017	12/31/9999
0000096180	john bailey	MEDICAL	HEALTH	007-FAM		No	01/01/2017	12/31/9999
0000096181	mike bailey	DENTAL BEN	DENTAL	007-FAM		No	01/01/2017	12/31/9999
0000096181	mike bailey	MEDICAL	HEALTH	007-FAM		No	01/01/2017	12/31/9999

Dependents

The Dependent [widget](#) displays information regarding your dependents. Select the **View** icon on the line of a selected dependent to view detailed information for that dependent.

Please refer to the [Benefits Enrollment Wizard](#) widget for detailed information on modifying dependent information.

View dependent information on this screen.

First Name	Last Name	Relationship	Gender	VIEW
Kevin	Franks	CHILD	Male	

Dependent Benefits

The Dependent Benefits [widget](#) displays the benefits coverage for your dependents. Select the **View** icon on the line of a selected dependent to view detailed dependent benefits coverage information.

Please refer to the [Benefits Enrollment Wizard](#) widget for detailed information on enrolling dependents into benefits.

View dependent benefits information on this screen.

First Name	Last Name	Type Class	Type Sub Class	Plan Class
Kevin	Franks	EMPLOYEE PLANS	CVISN	

ID: 0000093471 Override Coverage: --
 Name: Franks, Kevin Primary Care Physician: --
 Type Class: EMPLOYEE PLANS From: 22/01/2012
 Type Sub Class: CVISN To: --
 Plan Class: -- Comment:

Employee Benefits and Deductions

The Employee Benefits and Deductions [widget](#) allows you to view information pertaining to your benefits payroll deductions. Select the **View** icon on the line of a selected benefit to view detailed information regarding that benefit.

Please refer to the [Benefits Enrollment Wizard](#) widget for detailed information on modifying your employee benefits and deductions.

Employee Benefits and Deductions ☐ ☐

View Employee Benefits and Deduction information on this screen.

Title	Type	Plan	Amount	Percent	Primary Care Physician	From	To
VP - HS	KAISER	FAM		0.000000		01/01/2011	12/31/9999
VP - HS	METLIFE	.5 X SALARY		0.000000		01/01/2011	12/31/9999

Appt ID: --	From: 01/01/2011
Title: VP - HS	To: 12/31/9999
Payment Frequency: M	Goal Amount: --
Type: KAISER	Goal to Date Total Amount: --
Plan: FAM	Goal Type: --
Percent: 0.000000	Deduction Frequency: --
Amount: --	Overtime Deduction Category: --
Primary Care Physician: --	Category Cap: --
	Annual Cap Amount: --
	Life Event Enrollment: true
	Open Enrollment: true

Beneficiaries

The Beneficiaries [widget](#) displays a listing of your beneficiaries by **Benefit Type**, **Benefit Plan**, **Dependent ID**, **Beneficiary Name**, **% of Distribution**, and **From** and **To** dates. This widget allows you to create, view, and update beneficiaries associated to benefits where beneficiaries are allowed to be specified. You can also create a new beneficiary designation from this widget.

Select the **Create Beneficiary** button to create a new beneficiary designation. Select the Modify icon to make changes to an existing beneficiary designation.

The screenshot shows a window titled "Beneficiaries" with a table and a button. The table has the following data:

Benefit Type	Benefit Plan	Dependent ID	Beneficiary Name	From	To	Modify	% of Distribution
EF100	FAM		SARA FRANKS	06/07/2013	12/31/9999		100

Below the table, there is a "Create Beneficiary" button. The widget also displays detailed information for the selected beneficiary:

- Benefit Type: EF100
- Benefit Plan: FAM
- From: 06/07/2013
- To: 12/31/9999
- Dependent ID: --
- Beneficiary Name: SARA FRANKS
- Beneficiary Type: P
- % of Distribution: 100
- Relationship: --
- Relationship Desc: --
- Date of Birth: --
- Social Security Number: --
- Street 1: 11 MAIN ST
- Street 2: --
- City: --
- State/Province: VA
- Zip/Postal Code: 22038
- Country: USA
- County: --

Create Beneficiary

Some benefits, such as Deferred Compensation or Life Insurance, may allow you to designate beneficiaries. This is determined by your employer. If allowed, you can create a new beneficiary by selecting the **Create Beneficiary** button. This opens the Beneficiary page, which allows you to add an existing dependent as a beneficiary, add a person who is not a dependent as a beneficiary, or to specify a Trust as the beneficiary.

The **Beneficiary** page displays the beneficiary's name, relationship to you, whether the beneficiary should be a primary or secondary beneficiary, and the percent of distribution for the primary and secondary beneficiaries.

Designating Existing Beneficiaries

If the list of beneficiaries contains all the people you wish to designate as beneficiaries for this benefit, follow these steps:

1. For each person who is to be designated as a beneficiary, you will need to specify if they are to be a primary beneficiary or a secondary beneficiary. Select either *Primary* or *Secondary* as the **Beneficiary Type** for the beneficiary (Beneficiary Type will be indicated with a *P* or an *S* in the grid).
2. For each **Primary** beneficiary, enter the **Percent of Distribution** amount. The total Percent of Distribution for all primary beneficiaries must total 100%. For example, if you only have one

primary beneficiary, such as a spouse, you would enter 100 for the Percent of Distribution for the primary beneficiary. If you have two primary beneficiaries, you would divide the percentage between them (such as 50/50, 40/60, etc).

3. For each **Secondary** beneficiary, enter the **Percent of Distribution** amount. The total **Percent of Distribution** for all secondary beneficiaries must total 100%. For example, if you only have one secondary beneficiary, such as one child, you would enter 100 for the **Percent of Distribution** for that beneficiary. If you have multiple secondary beneficiaries, you would divide the percentage between them (such as 50/50, 20/20/20/20, etc).

If you wish to add a beneficiary that is not displayed in the list on this page, select the **Add Additional Beneficiary** button. A new beneficiary line will be added. Enter the information for the beneficiary and select the **Save** button. Refer to the Adding a New Beneficiary link below for more information.

Adding a New Beneficiary

If you wish to add a beneficiary that is not listed on the **Beneficiaries** page, perform these steps:

1. Select the **Add Additional Beneficiary** button. A new beneficiary link will be added and you can enter the beneficiary information including the beneficiary's name, suffix, birth date, gender, relationship, and social security number (SSN) (or select the SSN Applied For check box if the SSN number has not yet been assigned). This page also allows you to specify a Trust as a beneficiary.
2. Do not enter information in the **Trust** (name of the Trust) , **Date of Trust** (date the trust was established) , and **Trustee** (person who holds or manages the assets for the trust) fields unless the beneficiary is to be a Trust.
3. If a Trust is being specified as a beneficiary, only the **Trust** (name of the Trust) , **Date of Trust** (date the trust was established) , **Trustee** (person who holds or manages the assets for the trust) , and **Relationship** fields should be entered; all other fields should be left blank. The Relationship should be one that indicates a Trust.

- When all beneficiary information has been entered, select **Submit** to submit your beneficiary designations and return to the **Beneficiaries** page or select or select the Close icon to return to the **Beneficiaries** page without saving your changes.

Beneficiary ? X

General Information

This document allows you to create or update your beneficiary information.

*Benefit Type:

*Benefit Plan:

Enrollment Date:

Enrollment End Date:

Beneficiary Designation Details

Enter the beneficiary details in the section below. You can enter multiple beneficiaries by clicking the "Add Additional Beneficiary" button.

Name of Beneficiary	Beneficiary Type	Relationship	% of Distribution	Delete Line	Copy Line
	P		0		

Add Additional Beneficiary

Dependent ID:

*Name of Beneficiary:

Date of Birth:

*Beneficiary Type:

% of Distribution:

Relationship:

Social Security Number:

Trust:

Date of Trust:

Trustee:

* Street 1 :

Street 2:

* City :

State/Province:

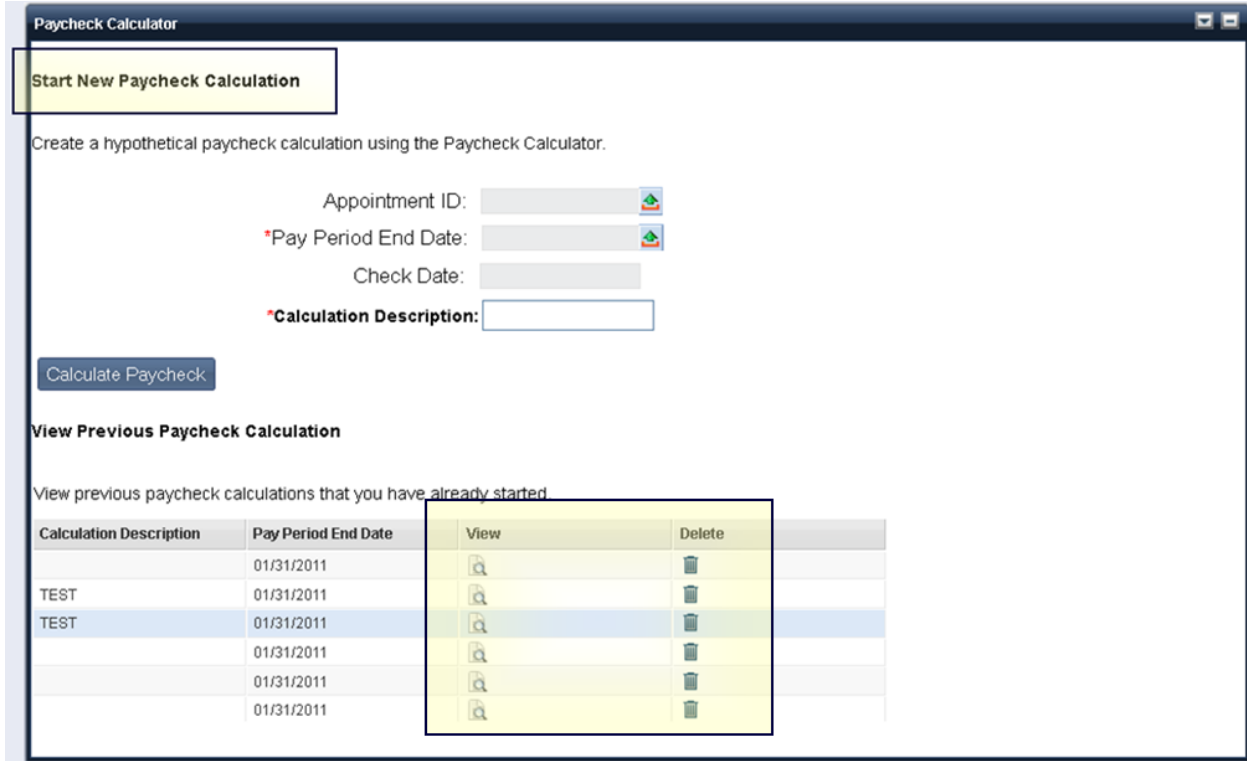
* Zip/Postal Code:

* Country:

County:

Paycheck Calculator

The Paycheck Calculator widget allows you see the impact of changing salary, timesheet, deduction, or tax information will have on your pay check by allowing you to calculate a mock paycheck. This widget also displays previous pay check calculations.



Start New Paycheck Calculation

Enter the information in the Start New Paycheck Calculation necessary to calculate a pay check. Select the **Calculate Pay Check** button to calculate how modifying your pay and benefit information will effect the amount of your paycheck. Your results will be displayed in the **View Previous Pay Check Calculation** section of the widget.

To start a new paycheck calculation perform the following steps, enter a **Pay Period End Date** and a **Calculation Description** in the Start New Paycheck Calculation section. The Calculation Description is a textual description to help identify the differences between various Paycheck Calculations that were entered on the Paycheck Calculator page. The **Check Date** field is derived based on the **Pay Period End Date** that is chosen. When you select the **Calculate Paycheck** button, the calculation occurs and the information in the Paycheck Calculator widget is populated. The Paycheck Calculator automatically populates the widget with the current pay data for the selected pay period. Select the View icon on the line of the paycheck calculation to view the details of that calculation.

View Previous Paycheck Calculation

The **View Previous Paycheck Calculation** section displays a list of previously calculated paychecks. Select the View icon on the line of a paycheck calculation to view the details of that calculation. The Paycheck Summary section displays the results of the calculated check at a summary level. This section shows the totals for Pay, Deductions, Fringes, Net Pay, FICA Wages, and Reimbursables.

Select the **View Pay and Deduction Details** button to display pay details, deduction details, and fringe details for the calculated pay check.

Calculated Paycheck ✖

Paycheck Summary

Paycheck Summary details are listed below. You can click the Recalculate button to redo the calculation after you have changed pay and deduction details.

Appointment ID:	Total Pay: \$0.00
Calculation Description:	Total Deductions: \$0.00
Pay Period End Date: 01/31/2011	Net Pay: \$0.00
Check Date: 01/31/2011	FICA Wages: \$0.00
Combined Check: <input checked="" type="checkbox"/>	Total Fringe: \$0.00
	Reimbursable: \$0.00

View Pay and Deduction Details

Recalculate

Change Pay/Deduction Details

You can change pay and deduction details using the buttons below in order to see how changes will impact your future paychecks.

Pay:

Change Salary

Change Timesheet Details

Add Non-Eligible Pay

Deductions:

Change Deductions/Benefits

Change Tax Rules

Add Non-Eligible Deductions/Benefits

You can use the buttons in the Change Pay/Deduction Details section to see how modifications to different areas will impact your future paychecks. Using these buttons you can add or modify salary, timesheet (pending pay) details, tax rules, and benefit/deduction information, as well as add earnings or deductions for which your current pay/deduction policy is not eligible.

Note: Changing information using these buttons does not change actual payroll information. This data is simply copied from actual payroll data for the purpose of seeing the effect of the changes on your paycheck.

Select the options below for more information on each button in this section.

- **Change Salary**

The Salary page automatically populates with your base salary information and any other active pay parameters. To make changes, enter data in the Pay Event Type, Amount/Percent Indicator, Amount, Percent, From, To, Increase/Decrease ID and Percentage Inc/Dec fields and select the **Save** button. Select the **Back** button to return to the Calculate Paycheck Summary page.

✖
Change Salary

Back

Change salary parameters to see how your paycheck will be impacted.

Appointment ID	Pay Event Type	Amount/Perce	Amount Basis ID	Amount	Percent	% Increase /Decrease	From	To	Delete	Copy
	REGULAR PAY	Amount	Annual Salary	500.0000			01/01/2013	12/31/9999		

Insert

Appointment ID:

*Pay Event Type:

Amount/Percent Indicator:

Amount Basis ID:

Amount:

Percent:

*From:

To:

Increase/Decrease ID:

Percent Inc/Dec:

Hourly Pay Rate:

Daily Pay Rate:

Weekly Pay Rate:

Monthly Pay Rate:

Annual Pay Rate:

Pay Period Pay Rate:

Save

- **Change Timesheet Details**

The Timesheet Details page automatically populates with any pending pay records for the selected pay period. Your paycheck is then calculated with this pay and deduction information. To make changes, enter data in the Appointment ID, Event Date, Pay Type, Pay Rate and Hours/Amount fields and select the **Save** button. Select the **Back** button to return to the Calculate Paycheck Summary page.

✖
Timesheet Details

Back

Change timesheet details to see how your paycheck will be impacted.

Appointment ID	Pay Event Type	Pay Rate	Input Amount	Dollar Amount	Event Date	Delete	Copy
	REG PAY	33.0000	10:00	330.00	05/31/2013		
1	REG PAY	20.0000	4:00	80.00	05/04/2013		
1	REG PAY	20.0000	2:30	50.00	05/18/2013		

Insert

Appointment ID:

*Pay Event Type:

*Event Date:

Pay Rate:

*Hours/Amount:

Save

- **Add Non-Eligible Pay**

The Non-Eligible Pay window is initially blank when the **Calculate Paycheck** link is selected. Pay for which you are not currently eligible (based on pay policy assignments) can be added here for calculation purposes. Adding pay information to these pages does not change actual pay information. It is added here simply to see what impact these changes may make on a paycheck. After making your changes, select **Save** to include these changes in the paycheck calculation. Select the **Back** button to return to the Calculated Paycheck Summary page.

Non-Eligible Pay ✖

Back

PCNEPAY - Add pay events that you are not currently eligible for to see how your paycheck will be impacted.

Appointment ID	Pay Type	Dollar Amount	Event Date	Delete	Copy
	PAID OVERTIME	400.00	03/12/2013	🗑	📄
A	O/T PR	80.00	04/01/2013	🗑	📄
B	REGLR	70.00	03/31/2013	🗑	📄

Insert

Appointment ID:

*Pay Event Type: PAID OVERTIME

* Event Date:

* Dollar Amount:

Save

- **Change Deductions/Benefits**

The Benefits and Deductions page is automatically populated with information from your benefit and deduction parameters records when the **Calculate Paycheck** button is selected. Information on these pages can be added, removed, and modified to determine the effect the change will have on your paycheck. Changing this information does not change actual payroll information. This data is simply copied from actual payroll data for the purpose of seeing the effect of the changes on your paycheck. To make changes, enter data in the Appointment ID, Deduction Type, Deduction Plan, From, To, Override Deduction Amount and Override Deduction Percent fields and select the **Save** button. Select the **Back** button to return to the Calculated Paycheck Summary page.

Benefits and Deductions

Back

Change your benefits and deductions to see how your paycheck will be impacted.

Appointment ID	Deduction/Benefit Type	Deduction/Benefit Plan	Override Deduction/Benefit Amount	Override Deduction/Benefit Percent	From	To	Delete	Copy
99999	NET PAY	NET PAY	20.00	0.000000	05/01/2013	05/31/2013		
99999	NET PAY	NET PAY	25.00	0.000000	06/01/2013	12/31/9999		
CSP- EMPLOYEE	TEST CSP02	TEST CSP02	0.00	0.000000	04/01/2013	04/30/2013		
CSP- EMPLOYEE	TEST CSP02	TEST CSP02	10.00	0.000000	05/01/2013	05/31/2013		
CSP- EMPLOYEE	TEST CSP02	TEST CSP02	12.00	0.000000	06/01/2013	06/30/2013		
CSP- EMPLOYEE	TEST CSP02	TEST CSP02	20.00	0.000000	07/01/2013	12/31/9999		

Insert

Appointment ID :

*Deduction/Benefit Type :

*Deduction/Benefit Plan :

Benefit Type Class Desc:

Benefit Type Sub Class Desc:

Benefit Plan Class Desc:

* From:

To:

Override Deduction/Benefit Amount:

Override Deduction/Benefit Percent:

Employee Override Allowed:

Deduction Amount:

Deduction Rate:

Save

- **Change Tax Rules**

The Tax Rules page is automatically populated with information from your tax parameter records, which is effective as of the entered Pay Period End Date, when the **Calculate Paycheck** button is selected. Information on these pages can be added, removed, and modified to determine the effect the change will have on your paycheck. Changing this information does not change actual payroll information. This data is simply copied from actual payroll data for the purpose of seeing the effect of the changes on your paycheck. To make changes, enter data in the Appointment ID, Tax Class, FICA Class, Marital Status - Federal, Marital Status - State, Dependents, Other Income, From, To, Tax Allowance - Federal, Tax Allowance - State, Tax Allowance - Additional State, Multiple Jobs check box, and Deductions fields and select the **Save** button. Select the **Back** button to return to the Calculated Paycheck Summary page.

✖
Tax Rules

Back

PCTAX - Change tax rules to see how your paycheck will be impacted.

Remember to Save prior to pressing Back.

Appointment ID	Tax Class	FICA Class	Marital Status - Federal	Marital Status - State	Delete	Copy
					🗑	📄

Insert

Appointment ID:

*Tax Class:

*FICA Class:

Marital Status-Federal:

Marital Status-State:

Dependents:

Other Income:

* From:

To:

Tax Allowance-Federal:

Tax Allowance-State:

Tax Allowance-Additional State:

Multiple Jobs:

Deductions:

Save

- **Add Non-Eligible Deductions/Benefits**

The Non-Eligible Deductions/Benefits window is initially blank when the **Calculate Paycheck** link is selected. Deductions and benefits for which you are not currently eligible (based on deduction and benefit policy assignments) can be added here for calculation purposes. The Non-Eligible Deductions/Benefits page contains the deduction and tax parameter entries that are effective as of the entered **Pay Period End Date**. Adding deduction/benefit information to these pages does not change your actual deduction/benefit information. It is added here simply to see what impact these changes may make on a paycheck.

To make changes, enter data in the Appointment ID, Deduction Type, Deduction Plan, From, To, Override Deduction Amount and Override Deduction Percent fields and select the Save button. Select the **Back** button to return to the Calculated Paycheck Summary page.

Once you have made all your changes using these buttons, select the **Recalculate** button to recalculate the paycheck using your recent changes.

Delete Previous Paycheck Calculation

To remove a paycheck calculation from the list in the View Previous Paycheck Calculation section, simply select the Delete icon on the line of the calculation you wish to remove.

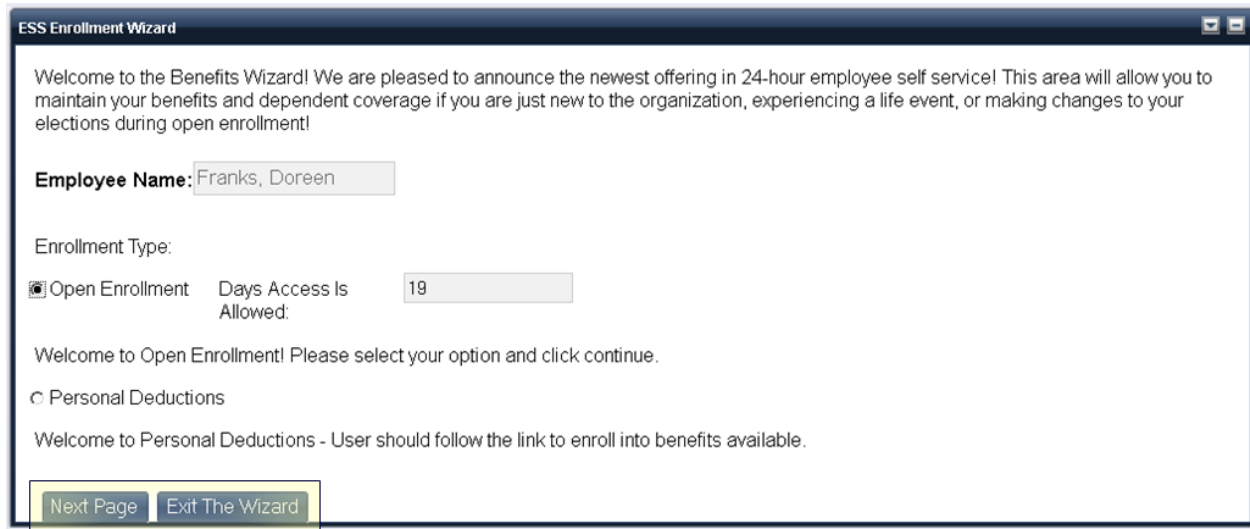
Benefits Enrollment Wizard Tab

The following [widgets](#) can be found on the Benefits Enrollment Wizard sub tab:

- [ESS Enrollment Wizard](#)

Benefits Enrollment Wizard

The Benefits Enrollment Wizard [widget](#) is an electronic enrollment process that enables you to enroll yourself and any eligible dependents into the various employee benefit programs. Your organization can specify whether you can perform electronic enrollments for being newly hired to the organization, for an open enrollment period, or for a life event.



The screenshot shows a web browser window titled "ESS Enrollment Wizard". The main content area contains a welcome message: "Welcome to the Benefits Wizard! We are pleased to announce the newest offering in 24-hour employee self service! This area will allow you to maintain your benefits and dependent coverage if you are just new to the organization, experiencing a life event, or making changes to your elections during open enrollment!". Below this, there is a form with the following elements:

- Employee Name:** A text input field containing "Franks, Doreen".
- Enrollment Type:** A section with two radio button options:
 - Open Enrollment: Days Access Is Allowed: 19 (with a text input field containing "19").
 - Personal Deductions: Welcome to Personal Deductions - User should follow the link to enroll into benefits available.

At the bottom of the form, there are two buttons: "Next Page" and "Exit The Wizard".

Benefits Enrollment Wizard - Benefits Enrollment Pages

The **Benefits** enrollment pages of the Benefits Enrollment Wizard allow you to waive or enroll in selected benefits depending on your employer's requirements. Enrollment benefits are sorted by benefit type, such as Medical, Dental, Vision, etc. For instance, all medical benefits in which you are eligible to enroll will be displayed on one page (Benefits - Medical) while all dental benefits will be displayed on a separate page (Benefits - Dental), etc.

Listed below are examples of some of the Benefit pages available. Select one of these links for more information.

- **Medical**

ESS Enrollment Wizard

Benefits - Medical

Please confirm the correct dependents are being covered for this benefit by selecting the Confirm or Modify Persons Covered button.

Benefit	Coverage Level	Persons Covered	Summary
<input type="radio"/> bcbs	<input type="radio"/> EMPLOYEE ONLY	Confirm or Modify Persons Covered	Employee Cost \$492.00
<input type="radio"/> CIGNA	<input checked="" type="radio"/> FAMILY		Employer Cost \$438.20
<input type="radio"/> kaiser	<input type="radio"/> EP+1		Deduction Frequency: Semi-monthly
<input checked="" type="radio"/> kaiser1			

[Next Page >](#) [Save and Exit](#)

- **Dental**

ESS Enrollment Wizard

Benefits - Dental

Please confirm the correct dependents are being covered for this benefit by selecting the Confirm or Modify Persons Covered button.

Benefit	Coverage Level	Persons Covered	Summary
<input checked="" type="radio"/> DELTA DENTAL - NON-REP	<input type="radio"/> EMPLOYEE ONLY	Confirm or Modify Persons Covered	Employee Cost \$82.50
	<input type="radio"/> EP+1		Employer Cost \$0.00
	<input checked="" type="radio"/> FAMILY		Deduction Frequency: Semi-monthly

[< Prior Page](#) [Next Page >](#) [Save and Exit](#)

- **Vision**

ESS Enrollment Wizard

Benefits - Vision

Please confirm the correct dependents are being covered for this benefit by selecting the Confirm or Modify Persons Covered button.

Benefit	Coverage Level	Persons Covered	Summary
<input type="radio"/> specetra vision	<input type="radio"/> EMPLOYEE ONLY	Confirm or Modify Persons Covered	Employee Cost \$72.50
<input checked="" type="radio"/> Vision Plan	<input checked="" type="radio"/> FAMILY		Employer Cost \$28.20
			Deduction Frequency: Semi-monthly

[< Prior Page](#) [Next Page >](#) [Save and Exit](#)

- **Health Care Spending Account**

ESS Enrollment Wizard

Benefits - Health Care Spending Account

Please confirm the correct dependents are being covered for this benefit by selecting the Confirm or Modify Persons Covered button.

Benefit	Coverage Level	Persons Covered	Summary
<input checked="" type="radio"/> HLTH CARE SPA	<input checked="" type="radio"/> EMPLOYEE ONLY		Employee Cost:\$ Employer Cost:\$0.00 Deduction Frequency:Semi-monthly

HLTH CARE SPA	Goal Amount	Summary
<input checked="" type="radio"/> health care spending account	Goal Amount:\$ <input type="text" value="5000.00"/>	Employee Contribution:\$0.00
	Employee Contribution:\$ <input type="text" value="0.00"/>	Employer Contribution:\$0.00
	Number of Pay checks: <input type="text" value="0"/>	Deduction Frequency:Semi-monthly
		Paycheck Deduction Starts:
		Check Date Goal is Met:

< Prior Page Next Page > Save and Exit

- **Life Insurance**

ESS Enrollment Wizard

Benefits - Life Insurance

Please select the Life Insurance plans you want to enroll in and then select the information link to complete the Life Insurance questionnaires. You may only select one of each coverage level offered.

Life Insurance Benefit	Coverage Level	Life Insurance Questionnaires
<input checked="" type="checkbox"/> METLIFE LIFE INSURANCE	<input type="checkbox"/> EMPLOYEE ONLY	Employee Only Life Insurance Questionnaires
<input type="checkbox"/> METLIFE LIFE INSURANCE	<input type="checkbox"/> EP-1	Employee Only Life Insurance Questionnaires
<input type="checkbox"/> METLIFE LIFE INSURANCE	<input type="checkbox"/> FAMILY	Confirm or Modify Dependent(s)
<input type="checkbox"/> METLIFE LIFE INSURANCE 200	<input type="checkbox"/> DEPENDENT	Confirm or Modify Dependent(s)
<input type="checkbox"/> METLIFE LIFE INSURANCE 200	<input type="checkbox"/> empl	Employee Only Life Insurance Questionnaires
<input type="checkbox"/> METLIFE LIFE INSURANCE 200	<input type="checkbox"/> EMPLOYEE ONLY	Employee Only Life Insurance Questionnaires

< Prior Page Next Page > Save and Exit

- **Long Term Disability**

ESS Enrollment Wizard

Benefits - Long Term Disability

Please confirm the correct dependents are being covered for this benefit by selecting the Confirm or Modify Persons Covered button.

Benefit	Coverage Level	Persons Covered	Deduction Parameter	Summary
<input checked="" type="radio"/> LTD	<input checked="" type="radio"/> EMPLOYEE ONLY		Deduction Rate: <input type="text" value="4.00"/> %	Employee Cost:\$132.00 Employer Cost:\$0.00 Deduction Frequency:Every Paycheck

< Prior Page Next Page > Save and Exit

- **Pension**

Benefit	Coverage Level	Persons Covered	Deduction Parameter	Summary
<input checked="" type="radio"/> LACERA PLAN D MONTHLY PRE-TAX	<input checked="" type="radio"/> EMPLOYEE ONLY		Deduction Rate: <input type="text" value="4.00"/> %	Employee Cost: \$120.00 Employer Cost: \$0.00 Deduction Frequency: Every Paycheck

Buttons: < Prior Page, Next Page >, Save and Exit

Other pages that might be displayed as Benefit options include: Dependent Care Spending Account, Short Term Disability, Long Term Disability-Health, Accidental Death and Dismemberment, Survivor Income Benefits, and Deferred compensation

For detailed information on each of the areas of the Benefits pages refer to one of the following options below:

- **Benefit**

The Benefit column displays the description of the benefit, for example CIGNA HMO. Select the radio button next to each benefit in which you wish to enroll.

- **Coverage Level**

The Coverage Level column displays the eligible coverage levels associated with each benefit type. Select the radio button next to the coverage level in which you wish to enroll.

- **Persons Covered**

A **Confirm/Modify Person(s) Covered** button will be displayed in this column. If this button is selected, you will be presented with a Confirm or Modify Persons Covered page, where you can confirm or modify the individuals to be covered by the benefit.

The **Confirm or Modify Person(s) Covered** page displays a list of individuals who are eligible for coverage for the specified benefit. For instance, if the benefit allows dependents, then previously disclosed dependents are displayed to allow you to confirm continued coverage or to remove any dependent that is no longer to be covered by the benefit. For example, if the benefit is for Employee plus 1, you will see your name as the employee as well the current dependent being covered, with the option to change the dependent to another dependent.

You can select the **Remove** button (Trash can icon) to remove any dependents that should not be covered by the benefit. Removing the dependent from this benefit coverage will not alter any information for your established dependents, but will only remove the dependent from this particular benefit coverage.

Confirm or Modify Persons Covered Pop Up Window

Confirm or Modify Persons Covered

		Person Covered	Relationship	Primary Care Physician	Primary Care Physician Look Up
		EVANS, SARA M	DAUGHTER	<input type="text"/>	<input type="text"/>

[Add New Dependent](#) [Add Existing Dependent](#)

Primary Care Physician and Primary Care Physician Lookup - allows you to define or lookup a Primary Care Physician for the benefit.

Some benefits may require that a Primary Care Physician (PCP) be specified. If required, the Primary Care Physician and Primary Care Physician Lookup columns will be displayed.

Otherwise, these columns will not appear. If these columns do appear, enter the PCP Name. If you do not know the PCP Name, you may select web link under Primary Care Physician Lookup, which will take you to another browser to locate a PCP. You will not lose your place within the ESS Enrollment Wizard upon closing the web link. Once located, manually enter the name of the PCP Name as this will not automatically be inferred.

If you do not see the dependent that you want to be covered you can ***add a new dependent*** or ***add an existing dependent***.

Adding Existing Dependent(s) to the Benefits Coverage

Select the **Add Existing Dependent(s)** link to add an existing dependent(s) to the benefit coverage. You will be presented with a list of dependent(s) not currently being covered by the benefit. Choose the dependent(s) which should be added by selecting the check box next to their name and then selecting the **Add to Benefit** button.

Add Existing Dependent Pop Up Window ✕

Existing Dependents

Please check the dependent(s) you want to be added to the Benefit for coverage and select Add To Benefit button.

First Name	Middle Name	Last Name	Relationship
<input type="checkbox"/> SARA	Michelle	EVANS	DAUGHTER

Add To Benefit
Cancel

Adding a New Dependent

To add a dependent that is not displayed, select the **Add New Dependent** link. You will be presented with a pop-up where you can define the dependent information.

Add New Dependent Pop Up Window ✕

Add Dependent

First Name:

Middle Name:

Last Name:

Suffix:

Birth Date:

Gender:

Relationship:

Wedding Date:

Divorce/Separated Date:

SSN:

SSN Applied For:

Disabled:

Student:

[Attach Supporting Documents](#)

Apply Changes
Cancel Changes

1. You must enter the dependent's **First Name, Last Name, Birth Date, Gender, Relationship,** and **SSN**. If you do not know the Social Security Number or one has not been assigned yet, you can select the SSN Applied For check box. Either the SSN or the SSN Applied for must be specified, but not both.
2. You may also provide the following optional information: **Middle Name, Suffix, Wedding Date, Divorce/Separated Date, SSN Applied For** (only if you do not know the SSN), **Disabled,** and **Student**.
3. Select the **Apply Changes** button to save your changes and return to the **Confirm or Modify Person(s) Covered** page.
4. Select the **Add Existing Dependent** link to display the list of dependent(s) that can be selected. You will see your newly added dependent in this list.

Add Existing Dependent Pop Up Window

Existing Dependents

Please check the dependent(s) you want to be added to the Benefit for coverage and select Add To Benefit button.

First Name	Middle Name	Last Name	Relationship
<input type="checkbox"/> SARA	Michelle	EVANS	DAUGHTER

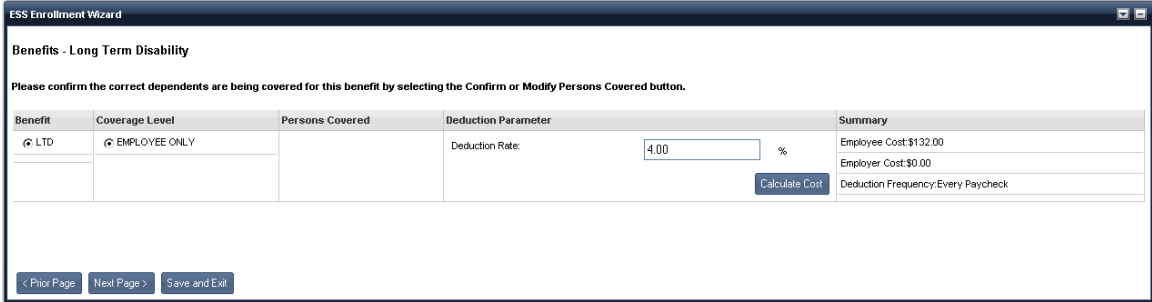
Add To Benefit **Cancel**

5. Select the check box next the dependent's name, enter the **Primary Care Physician**, if required, and then select the **Add to Benefit** button.
6. Select **Cancel Changes** if you wish to exit the Confirm or Modify Person(s) Covered page without saving your changes and be returned to the Benefit page.

- **Deduction Parameter**

The content in Deduction Parameter column varies depending on the benefit that you have selected:

- If the benefit is dollar based (meaning the deduction is based on a set dollar amount) and you are allowed to change this amount, this column will contain the **Employee Cost** and a **Calculate Cost** button. You can enter your desired deduction amount and refresh the Summary section by selecting the **Calculate Cost** button.
- If the benefit is rate based (meaning the deduction is based off a percentage) and you are allowed to change this rate, this column will contain the **Deduction Rate** and a **Calculate Cost button**. You can enter your desired deduction rate and refresh the Summary section by selecting the **Calculate Cost** button.
- If the benefit is rate based (meaning the deduction is based off a percentage) but this rate cannot be altered, this column will display the required **Deduction Rate** for this benefit.
- If the benefit is dollar based (meaning the deduction is based on a set dollar amount) but the amount cannot be altered, the **Deduction Parameter** column will not appear.



- **Summary**

The Summary column displays the following information:

- **Employee Cost** - the amount that you (the employee) are responsible for paying.
- **Employer Cost** - the amount that the employer is contributing to your benefit cost.
- **Deduction Frequency** - the frequency in which the deduction will be taken. For example, Semi-monthly paycheck, Bi-weekly paycheck, or Weekly paycheck.

- **Waive Benefit/ Waive Benefit Incentive Amount**

If you elect to waive a benefit (chose not to enroll in a benefit), a radio button to waive the benefit will be displayed. Select this button to waive the benefit. If a benefit offers an incentive for waiving the benefit, you will be automatically enrolled into a benefit that will generate the incentive amount.

Note: Not all organizations offer an incentive for waiving a benefit.

- **Goal Oriented Deduction**

- **Goal Amount**

The Goal Amount column varies depending on the Benefit selected:

- Goal amount can vary based on the benefit. In some cases you will not be able to change the Goal Amount, whereas in other cases, you will be able to specify a Goal Amount.
- If you can change the goal amount to achieve, you will be required to select the **Calculate Cost** button to see the amount you will pay per pay period to meet the goal you specified. The **Employee Contribution** field will be updated to show how much you will be contributing to meet the goal specified.
- If you can change the field value you will be required to select the **Calculate Cost** button to refresh the **Summary** section.

- **Employee Contribution**

- This field can be a set employee contribution amount per paycheck that is not changeable by you; or this field can be changeable by you to allow you to specify how much you want to contribute per paycheck to meet the goal.
- If you can change the field value you will be required to select the **Calculate Cost** button to refresh the **Summary** section.

- **Number of Paychecks**

For example, if you enter a goal amount of 5,000.00, and select the **Calculate Cost** button, the deduction calculation logic will take into account when the deduction will begin being taken from your pay check and the frequency for which the deduction is set up (for this example, it will be semi-monthly). The deduction cost amount would return: 24 pay checks expected for the year, thus $5,000.00 / 24 = 208.33$.

- **Summary column**

The Summary column displays the **Employee Contribution**, **Employer Contribution** (if applicable), **Deduction Frequency**, **Pay Check Deduction Starts**, and **Check Date Goal is Met**.

Goal Amount		Summary
Goal Amount:\$	<input type="text" value="5000.00"/>	Employee Contribution:\$0.00
Employee Contribution:\$	<input type="text" value="0.00"/>	Employer Contribution:\$0.00
Number of Pay checks:	<input type="text" value="0"/>	Deduction Frequency:Semi-monthly
		Paycheck Deduction Starts:
		Check Date Goal is Met:
	<input type="button" value="Calculate Cost"/>	

- **Cafeteria Contribution Available**

If you are currently enrolled or select to enroll in a Cafeteria Benefit program, the ESS Enrollment Wizard will display a running balance of the Cafeteria Benefit Contribution monies that are available to be applied towards your Cafeteria Benefits.

- **Cafeteria Benefits based on Medical Plan coverage level**

On the Benefits – Medical page, the initial Cafeteria Contribution Available balance will be 0.00 until you select a Coverage Level. Once you select a Coverage Level, the Cafeteria Contribution Available field will be updated to reflect the remaining Cafeteria Contribution available to cover additional Cafeteria Benefits. As you select to enroll in additional Cafeteria Benefits the Cafeteria Contribution Available field will be updated each time you select to enroll in a Cafeteria Benefit.

- **Cafeteria benefits based on a percentage of your salary**

On the Benefits – Medical page, as you select to enroll in Cafeteria Benefits the Cafeteria Contribution Available field will be updated each time you select to enroll in a Cafeteria Benefit.

To transition to the next page in the Benefits Enrollment Wizard, select the **Next Page** button. Your enrollment selections/changes will be verified and you will be notified if there are any errors that need to be corrected. If there are no errors, you will be presented with the next page in the ESS Enrollment Wizard.

Benefits Enrollment Wizard - Life Insurance Benefits Enrollment

The Life Insurance enrollment page allows you to select and calculate your cost to enroll in a Life Insurance plan and calculate the cost you will incur based on the information you enter, such as whether you are selecting employee only, spouse only, and/or dependents. Select the options below for more information.

- **Life Insurance Benefit – Employee Only**

Employee Only life insurance benefits may take into account any or all of the following information:

- The age of the employee
- The employee's annual salary
- The employee's tobacco/nicotine usage
- The employee's gender
- The employee elected coverage level (percentage of annual salary)

To enroll in the employee only life insurance coverage, follow these steps:

1. Select the **Employee Only Coverage Level** for the Life Insurance plan then select the link for the **Employee Only Life Insurance Questionnaires**.

2. Select your level of **Tobacco/Nicotine Use**.

- The **Coverage Amount** will display the available coverage level plan amounts based on your answer to the Tobacco/Nicotine Use question. Select the desired **Coverage Amount**.

Tobacco/Nicotine Use:

Coverage Amount:

Deduction Frequency:

Employee Cost: \$ 0.00

- Select the **Calculate Cost** button to see the calculated deduction based on the deduction frequency.
- Select **Apply Changes** when you are satisfied with the coverage or **Cancel Changes** to quit without saving your changes.

- Life Insurance Benefit – Spouse Only**

Spouse Only life insurance benefits may take into account the following parameters:

- The age of the spouse
- The spouse's tobacco/nicotine usage
- Coverage Level (amount of coverage)

To enroll in Employee Only life insurance coverage, follow these steps:

- Select the **Spouse Only Coverage Level** for the Life Insurance plan.
- Select the link for the **Spouse Only Life Insurance Questionnaires**.
- Select **Tobacco/Nicotine Use** for your spouse.

Tobacco/Nicotine Use:

Coverage Amount:

Deduction Frequency:

Employee Cost:

- The **Coverage Amount** field will display the eligible coverage level plan amounts based on your answer to the Tobacco/Nicotine question and.
- Select the desired **Coverage Amount**.
- Select the **Calculate Cost** button to see the calculated deduction based on the deduction frequency.

7. Select **Apply Changes** when you are satisfied with the coverage or **Cancel Changes** to quit without saving your changes.

- **Life Insurance Benefit – Dependent(s) Only**

Dependent(s) Only life insurance benefits will take into account the following information:

- Coverage Level (amount of coverage).

To select a Dependent(s) only life insurance benefit, follow these steps:

1. Selects the Dependent(s) Coverage Level.
2. Select the link for the **Confirm/Modify Dependent(s)** under Life Insurance Questionnaires.

Coverage Amount	Employee Cost	First Name	Middle Name	Last Name	Relationship
.5 X SALARY	0.00	SARA	Michelle	EVANS	DAUGHTER
Select		TIMOTHY	Evan	SMITH	DAUGHTER

3. After adding, modifying, or confirming dependent information, select the **Coverage Amount** from the list of eligible coverage level plan amounts.
4. The **Employee Cost** will be automatically populated based on the **Coverage Level** selected.

For information on adding or modifying Life Insurance beneficiaries, refer to [Adding/Modifying Beneficiaries](#).

Select the **Next Page** button to transition to the next section of the Benefits Enrollment Wizard (Personal Deductions Enrollment).

Benefits Enrollment Wizard - Adding/Modifying Beneficiaries

Some benefits, such as Deferred Compensation or Life Insurance, may allow you to designate beneficiaries. This is determined by your employer. If allowed, you will be presented with the **Designate Beneficiary** page of the Benefits Enrollment Wizard. This page will allow you to see your existing dependent(s), add a person who is not a dependent as a beneficiary, or to specify a Trust as the beneficiary.

Designate Beneficiary ✖

To add a beneficiary, select a dependent using the button next to the Dependent ID field (which will infer personal dependent information) and complete the Beneficiary Type and % of Distribution.

Beneficiary	Relationship	Primary	Secondary
		Total Primary Percent of Distribution: <input style="width: 100px;" type="text"/>	Total Secondary Percent of Distribution: <input style="width: 100px;" type="text"/>

Add Beneficiary
Apply Changes
Cancel Changes

The **Designate Beneficiary** page displays the beneficiary's name, relationship to you, whether the beneficiary should be a primary or secondary beneficiary, and the percent of distribution for the primary and secondary beneficiaries.

Designating Existing Beneficiaries

If the list of beneficiaries contains all the people you wish to designate as beneficiaries for this benefit, follow these steps:

1. For each person who is to be designated as a beneficiary, you will need to specify if they are to be a primary beneficiary or a secondary beneficiary. Select either the button under the **Primary** column or under the **Secondary** column for the beneficiary.
2. For each **Primary** beneficiary, enter the **Primary Percent of Distribution** amount. The total Percent of Distribution for all primary beneficiaries must total 100%. For example, if you only have one primary beneficiary, such as a spouse, you would enter 100 for the **Primary Percent of Distribution**. If you have two primary beneficiaries, you would divide the percentage between them (such as 50/50, 40/60, etc). As you enter each percentage, the **Total Primary Percent of Distribution** will be refreshed with the total amount. This total amount must equal 100.
3. For each **Secondary** beneficiary, enter the **Secondary Percent of Distribution** amount. The total **Percent of Distribution** for all secondary beneficiaries must total 100%. For example, if you only have one secondary beneficiary, such as one child, you would enter 100 for the **Secondary Percent of Distribution**. If you have multiple secondary beneficiaries, you would divide the percentage between them (such as 50/50, 20/20/20/20, etc). As you enter each percentage, the **Total Secondary Percent of Distribution** will be refreshed with the total amount. This total amount must equal 100.

If you wish to add a beneficiary that is not displayed in the list on this page, select the **Add Beneficiary** link and enter the information for the beneficiary. Refer the instructions under "**Adding a New Beneficiary**" below for further information.

Adding a New Beneficiary

If you wish to add a beneficiary that is not listed on the **Designate Beneficiaries** page, perform these steps:

1. Select the **Add Beneficiary** link from the bottom of the page. The Add Beneficiary pop up window will be displayed. On this page, you will enter the necessary information for the beneficiary, including the beneficiary's name, suffix, birth date, gender, relationship, and social security number (SSN) (or select the SSN Applied For check box if the SSN number has not yet been assigned). This page also allows you to specify a Trust as a beneficiary.
2. Enter the information for the Beneficiary. Do not enter information in the **Trust** (name of the Trust) , **Date of Trust** (date the trust was established) , and **Trustee** (person who holds or manages the assets for the trust) fields unless the beneficiary is to be a Trust.
3. If a Trust is being specified as a beneficiary, only the **Trust** (name of the Trust) , **Date of Trust** (date the trust was established) , **Trustee** (person who holds or manages the assets for the trust) , and **Relationship** fields should be entered; all other fields should be left blank. The Relationship should be one that indicates a Trust.
4. Select **Apply Changes** to save your changes and return to the **Designate Beneficiaries** page or select or select **Cancel Changes** to be returned to the **Designate Beneficiaries** page without saving your changes.
5. Your beneficiary will not be displayed in the list of beneficiaries on the **Designate Beneficiaries** page until you add them as an existing dependent. Follow the instructions above for "**Designating Existing Beneficiaries**" for further instructions.

Select the **Next Page** button to transition to the next section of the Benefits Enrollment Wizard (Personal Deductions Enrollment).

Benefits Enrollment Wizard - Personal Deductions Enrollment

The **Personal Deductions** page of the Benefits Enrollment Wizard allows you to see the personal deductions that are available and the deductions you have already selected on the same page. The **Personal Deductions** page is comprised of the following functions:

ESS Enrollment Wizard

Personal Deductions

Select the deductions in which you wish to enroll from the Deductions Available for Selection section.

Deductions Selected for Enrollment

Deduction Type	Deduction Plan	Goal Amount	Deduction Amount	Number Of Paychecks	Deduction Rate	Deduction Frequency	Pay Check Deduction Starts	Check Date Goal is Met	Remove	Modify
parking	parking		30.00	0	0%	Every Paycheck	02/16/2012			

1 of 1

Deductions Available for Enrollment

unit

Deduction Type	Deduction Plan	Goal Amount	Deduction Amount	Deduction Rate	Deduction Frequency	Select
UNITED WAY - PERCENTAGE, fairfax						
FTRET	DP01			25%	Every Paycheck	<input type="button" value="Select"/>
state employees credit union	state employees credit union			3%	Every Paycheck	<input type="button" value="Select"/>
survivor income benefit	survivor income benefit 25			3%	Every Paycheck	<input type="button" value="Select"/>
TEST	100.00		50.00	0%	SECOND HALF OF	<input type="button" value="Select"/>
UNITED WAY - PERCENTAGE	fairfax			1%	Every Paycheck	<input type="button" value="Select"/>

1 of 1

- **Deductions Selected for Enrollment Section**

The top portion of the **Personal Deductions** page displays a list of the personal deductions in which you have already selected for enrollment.

Deductions Selected for Enrollment

Deduction Type	Deduction Plan	Goal Amount	Deduction Amount	Number Of Paychecks	Deduction Rate	Deduction Frequency	Pay Check Deduction Starts	Check Date Goal is Met	Remove	Modify
parking	parking		30.00	0	0%	Every Paycheck	02/16/2012			

1 of 1

This Deductions Selected for Enrollments displays the Deduction Types and Plans which you have selected for enrollment along with the information you selected for the deduction: **Goal Amount** (the goal amount you selected for the deduction. This value is displayed only if the deduction is goal oriented.) , **Deduction Amount** (the amount to be deducted from each pay check) , **Number of Paychecks** (the number of pay checks from which deductions are taken in order to meet the goal. This value is displayed only if the deduction is goal oriented.) , **Deduction Rate** (the percentage of your salary to be used for the deduction) , **Deduction Frequency** (the frequency at which the deductions are taken, such as every paycheck, semi-monthly, bi-weekly, etc) , **Pay Check Deduction Starts** (the initial date when the deduction is taken from your pay check) , and **Check Date Goal is Met** (the date when the total contribution has reached the goal that was set. This value is displayed only if the deduction is goal oriented) .

From this list, you can also select to **Remove** a deduction (cancel the enrollment) or **Modify** a deduction.

Modify a Deduction

To modify a deduction in which you are currently enrolled, select the **Modify** icon under the **Modify** column. This icon is available only if you are allowed to modify one or more of the deduction parameters (such as the deduction amount or when the deduction starts). If you are not allowed to modify any of the parameters for this deduction, you will not see this icon.

When you select the **Modify** icon the **Modify Personal Deduction** pop up window will be displayed where you can make the necessary changes to the deduction. Select **OK** when your changes are complete. Refer to the "**Modifying a Personal Deduction**" section of the **Personal Deductions** topic for additional information on modifying a personal deduction.

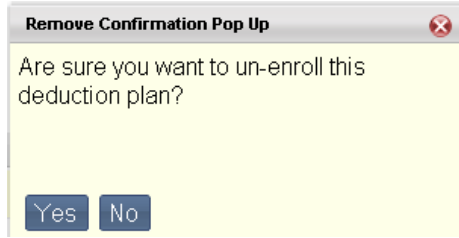
Modification pop up ✖

Modify Personal Deduction

Deduction Type	Deduction Plan	Deduction Amount	Deduction Rate	Deduction Frequency	Paycheck Deduction Starts
parking	parking	30.00	0%	Every Paycheck	02/16/2012

Remove a Deduction

To remove a personal deduction (to cancel the enrollment into the personal deduction), select the trash can icon from the **Remove** column. You will be presented with the **Remove Confirmation** pop up window, asking if you are sure you want to cancel your enrollment in this personal deduction.



- Select **Yes** to cancel your enrollment from this personal deduction. Your enrollment for this personal deduction will be canceled and you will be returned to the **Personal Deductions** page. The deduction will no longer be displayed under the **Deductions Selected for Enrollment** section.
 - Select **No** to keep your enrollment in the personal deduction and return to the **Personal Deductions** page. The deduction will still be displayed in the **Deductions Selected for Enrollment** section.
- **Deductions Available for Enrollment Section**

The lower portion of the **Personal Deductions** page displays a list of all the deductions that are available for your enrollment but have not been selected by you for enrollment.

The **Search** function allows you to search through all the available Personal Deductions in order to easily locate a specific deduction in which you wish to enroll. To search for a deduction, simply type the keyword in the **Search** box and any matching records for your keyword will be displayed. Select one of the matching records, and then select the **Search** button. Records matching the keyword will be displayed in the **Deductions Available for Selection** grid.

Select the **Clear Search** button to clear the search keyword box and it will reset the **Deductions Available for Selection** grid. This grid will initially display the first five Personal Deduction records available in alphabetical order.

Deductions Available for Enrollment

Unit

UNITED WAY - PERCENTAGE, fairfax

Deduction Type	Deduction Plan	Goal Amount	Deduction Amount	Deduction Rate	Deduction Frequency	
FTRET	DP01			25%	Every Paycheck	<input type="button" value="Select"/>
State employees credit union	State employees credit union		50.00	0%	Every Paycheck	<input type="button" value="Select"/>
UNITED WAY - PERCENTAGE	fairfax			1%	Every Paycheck	<input type="button" value="Select"/>

◀ ◀ of 1 ▶▶ ▶▶

Once the search action is performed and the matching personal deductions are found, they will be displayed in the **Deductions Available for Selection** grid. Once a personal deduction is

selected for enrollment the personal deduction will no longer be displayed in the **Deductions Available for Selection** grid again.

If a personal deduction offers multiple personal plans, the different plan options will be displayed as a drop-down list. Select the desired deduction plan from the drop-down list and then select the **Select** button to select this deduction for enrollment.

For each Deduction Type and Plan, the **Deductions Available for Enrollment** grid lists the following information: **Goal Amount** (the default goal amount for the deduction) , **Deduction Amount** (the default amount to be deducted from each pay check. When the Deduction Plan is displayed as a drop-down list with multiple available plans, the Deduction Amount is displayed as blank. When you select a plan from the drop-down list, the corresponding default deduction amount will be displayed.) , **Number of Paychecks** (only displayed for goal oriented deductions. The number of pay checks from which deductions will be taken in order to meet the goal specified.) , **Deduction Rate** (the default percentage of your salary to be used for the deduction) , and **Deduction Frequency** (the frequency at which the deductions are taken, such as every paycheck, semi-monthly, bi-weekly, etc.) .

When you select the **Select** button to enroll into the deduction, one of two things may happen.

- If none of the deduction parameters (Deduction Amount, Number of Paychecks, Deduction Rate, or Deduction Frequency) for the selected personal deduction are allowed to be modified, the personal deduction will be automatically added to the **Deductions Selected for Enrollment** grid at the top of the page and simultaneously removed from the **Deductions Available for Selection** section.
- If you are allowed to modify any of the default deduction parameters for the selected personal deduction, a **Deduction Modification** pop-up window is displayed to allow you to make changes to the deduction before adding the personal deduction to the **Deductions Selected for Enrollment** grid.

Refer to the instructions under "**Modifying a Personal Deduction**" for further information on modifying a deduction.

- **Modifying a Personal Deduction**

If you are enrolling into or modifying a previously selected deduction, and that deduction allows you to modify it, a **Deduction Modification** pop-up window will be displayed upon selecting the **Modify** icon. From this window you can change the settings for the deduction. The deduction fields are originally displayed with the default settings that have been setup for the deduction by your employer. If any of these settings are allowed to be changed, you will see a box around the field to indicate that the field can be edited (as shown below for **Deduction Amount**).

Deduction Type	Deduction Plan	Deduction Amount	Deduction Rate	Deduction Frequency	Paycheck Deduction Starts
parking	parking	30.00	0%	Every Paycheck	02/16/2012

OK Cancel

- **Deduction Amount** - If the **Deduction Amount** can be modified, enter the amount you would like to have deducted from your paycheck.
- **Deduction Rate** - If the **Deduction Rate** can be modified, enter the percentage to be used for the deduction. When you select the **Calculate Cost** button, the **Deduction Amount** will be re-calculated and displayed.
- **Number of Paychecks** - This field allows you specify the number of pay check that a goal amount will be distributed across to meet the goal for the deduction. For instance, if you have a deduction with a goal amount of \$1,000.00 and you specify 10 as the **Number of Paychecks**, the deduction amount will be \$100.00 per paycheck for 10 paychecks.
- **Deduction Frequency** - This field, which cannot be edited, displays the frequency in which the deduction will be taken (for example, semi-monthly, bi-weekly, annually, quarterly, every paycheck etc.).
- **Pay Check Deduction Starts** - When this field can be edited, it allows you to define when the initial deduction will start being taken from your paycheck. Select the check date from the drop down list of check dates available.
- **Check Date Goal is Met** - If the deduction is associated with a goal amount, this field will display the date of the pay check when the total goal amount will be met. This value will be displayed when you select the **Calculate Cost** button

Once you have finished making your changes, select **OK**. Your changes will be saved and you will be returned to the **Personal Deductions** page. If you decide you do not want to make any modifications to the deduction, select the **Cancel** button to discard your changes and return to the **Personal Deductions** page.

Select the **Next Page** button to transition to the next section of the Benefits Enrollments Wizard (Enrollment Summary).

Benefits Enrollment Wizard - Reviewing and Submitting

After completing all the pages of the **Benefits Enrollment Wizard**, you will be presented with the first of two **Enrollment Summary** pages. This page displays a summary of your enrollment selections that have not yet been submitted by you. Once you submit your enrollment you will be presented with another summary page that displays the summary of all the deductions you have elected to enroll in that have been submitted.

- Summary of Enrollments - Not Submitted Yet** - This summary page allows you to review the deductions you have elected to enroll in, but have not yet been submitted as your final elections. From this summary page you may still go back and make changes to your selections. Upon selecting the Submit Enrollment button you will be required to acknowledge that you agree to the deductions you have selected to enroll in.

Summary of Enrollment Selections - Not Submitted Yet

This is the final step of the Open enrollment process! You will have the ability to submit your selections for 2012 by selecting on the **SUBMIT ENROLLMENT** button.

Please select the icon next to the coverage level to see the persons covered by the benefit.

BENEFITS

Deduction	Coverage Level	Goal	Employee Out-of-Pocket Cost	Amount Paid by Employer	Coverage Period Starts
CIGNA	EMPLOYEE ONLY	0.00	50.34	0.00	02/16/2012
DELTA DENTAL - NON-REP	EMPLOYEE ONLY	0.00	11.01	0.00	02/16/2012
LACERA PLAN D MONTHLY PRE-TAX	EMPLOYEE ONLY	0.00	120.00	0.00	02/16/2012
LTD	EMPLOYEE ONLY	0.00	132.00	0.00	02/16/2012

FLEXIBLE SPENDING ACCOUNTS

Deduction	Goal	Employee Out-of-Pocket Cost	Coverage Period Starts
HLTH CARE SPA	0.00	0.00	02/16/2012

BENEFITS WAIVED

No Records Found

PERSONAL DEDUCTIONS


Deduction	Goal	Employee Out-of-Pocket Cost	Pay Check Deduction Starts	Pay Check Goal is Met
parking	0.00	30.00	02/16/2012	

Estimated Cafeteria Benefit Cash Back:

< Prior Page Save and Exit Print Email Submit Enrollment

This page displays the following information:

Benefits

- This section displays the benefits in which you have enrolled. Select the  icon displayed to the right of the **Deduction** column to display the **coverage information** for the deduction: who is covered by the benefit, their relationship to you, and if applicable, the name of the primary care physician. The **Benefits** section also displays the benefit's **Goal Amount** for a goal oriented benefit if applicable, your out-of-pocket expense per paycheck, the amount that will be contributed by your employer towards the benefit, and the date of the paycheck on which the deduction will begin.. The **Employee Out-of-Pocket Cost** amount is reduced by any **Cafeteria Benefit Contributions**, if applicable. The **Amount Paid by Employer** includes the employer paid fringe benefit amount plus any **Cafeteria Benefit Contributions**, if applicable.

Primary Care Physician Information

DELTA DENTAL - NON-REP

Person Covered	Relationship	Primary Care Physician
EVANS, SARA M	DAUGHTER	DR. MATTHEWS

Close

For example, if the employer fringe is \$15.00 and the Cafeteria Benefit Contribution applied is \$45.00, the total **Amount Paid by Employer** would be \$60.00. If you have chosen to waive any benefits, the benefits you have selected to waive will be displayed in the **Benefits Waived** section.

Flexible Spending Account

- Your Flexible Spending Accounts and Dependent Care Spending Accounts are displayed in their own section for ease of review. The **Flexible Spending Account** section displays the deduction's goal amount, your out-of-pocket expense per paycheck, and the date the coverage will begin.

Benefits Waived

- The benefits you have elected to waive are listed in the **Benefits Waived** section. If you have not elected to waive any benefits, this section will not be displayed.

Personal Deductions

- The **Personal Deductions** section displays the personal deductions in which you have elected to enroll. This section displays the goal amount for the deduction if applicable, your out-of-pocket expense per paycheck, the date of the pay check when the personal deduction will start, and the date the goal amount will be met, if applicable. If you have chosen to not enroll in any Personal Deductions, this section will not be displayed.

Estimated Cafeteria Benefit Cash Back

- The **Estimated Cafeteria Benefit Cash Back** is only displayed if you are actively enrolled in a Cafeteria Benefit Program and cash back is available to you after the cafeteria benefit costs you have elected to enroll in have been subtracted from the cafeteria benefit contribution available. If your employer does not offer a cash back incentive, this section is not displayed.

Enrollment Summary Actions




- **Prior Page** - If you need to make any changes before submitting your enrollments, select the **Prior Page** button at the bottom of the page to go back to the prior enrollment pages.
- **Save and Exit the Wizard** - The **Save and Exit the Wizard** button allows you to save your enrollment changes, but your selections have not been submitted. This allows you to exit the Benefits Enrollment Wizard and return at a later time to complete your enrollment selections.
- **Print** - Select the **Print** button to print a copy of your enrollment summary.
- **Email** - Select the **Email** button to send an email your elected enrollment summary.
- **Submit Enrollment** - After confirming all the information is correct, select the **Submit Enrollment** to submit your enrollments selections as final. You will receive an email with a confirmation of the submitted enrollment selections and an enrollment reference number. You will then be presented with the **Enrollment Summary - Submitted** page.

- **Summary of Enrollments - Submitted** - after your enrollment selections have been submitted, a summary page is displayed, which lists your enrollment elections that were submitted.

The **Summary of Enrollments - Submitted** page displays your benefits and personal deductions in which you have elected to be enrolled. This page displays the following information:

Benefits

- This section displays the benefits in which you have enrolled. Select the  icon displayed to the right of the Deduction column to display the **coverage information** for the deduction: who is covered by the benefit, their relationship to you, and if applicable, the name of the primary care physician. The **Benefits** section also displays the benefit's **Goal Amount** for a goal oriented benefit, your out-of-pocket expense per paycheck, the amount that will be contributed your employer towards the benefit, and the date of the paycheck on which the deduction will begin. The **Employee Out-of-Pocket Cost** amount is reduced by any Cafeteria Benefit Contributions, if applicable. The **Amount Paid by Employer** includes the employer paid fringe benefit amount plus any Cafeteria Benefit Contributions, if applicable. For example, if the employer fringe is \$15.00 and the Cafeteria Benefit Contribution applied is \$45.00, the total **Amount Paid by Employer** would be \$60.00. If you have chosen to waive any benefits the benefits you have selected to waive will be displayed in the Benefits Waived section.

Primary Care Physician Information		
DELTA DENTAL - NON-REP		
Person Covered	RelationShip	Primary Care Physician
EVANS, SARA M	DAUGHTER	DR. MATTHEWS

Close

Flexible Spending Account

- Your Flexible Spending Accounts and Dependent Care Spending Accounts are displayed in their own section for ease of review. The **Flexible Spending Account** section displays the deduction's goal amount, your out-of-pocket expense per paycheck, and the date the coverage will begin.

Benefits Waived

- The benefits you have elected to waive are listed in the **Benefits Waived** section. If you have not elected to waive any benefits, this section will not be displayed.

Personal Deductions

- The **Personal Deductions** section displays the personal deductions in which you have elected to enroll. This section displays the goal amount for the deduction if applicable, your out-of-pocket expense per paycheck, the date of the pay check when the personal deduction will start, and the date the goal amount will be met, if applicable. If you have chosen to not enroll in any Personal Deductions, this section will not be displayed.

Estimated Cafeteria Benefit Cash Back

- The **Estimated Cafeteria Benefit Cash Back** is only displayed if you are actively enrolled in a Cafeteria Benefit Program and cash back is available to you after the cafeteria benefit costs you have elected to enroll in have been subtracted from the cafeteria benefit contribution available. If your employer does not offer a cash back incentive, this section is not displayed.

Enrollment Summary Actions

- **Print** - Select the **Print** button to print a copy of your enrollment summary.
- **Email** - Select the **Email** button to send an email your enrollment summary.
- **Exit the Wizard** - Select the **Exit the Wizard** button to exit the Benefits Enrollment Wizard.

Performance Tab

The Performance tab allows you view information on your current/past performance expectations and evaluations and to submit a Self Evaluation. The Performance tab consists of the following sub tabs:

Evaluations

The following [widgets](#) can be found on the Evaluations sub tab:

- [Current Evaluations](#)
- [Past Evaluations](#)
- [Self Evaluations](#)
- [Past Self Evaluations](#)

Current Evaluations

The Current Evaluations [widget](#) allows you to view your most recent evaluations which have been signed/released by your manager and now require your signature. Select an evaluation from the list to view the complete evaluation via the Current Evaluations Wizard.

Name	Evaluation Type	Evaluation Due Date	Evaluation Ready for Next Level Manager	Evaluation Reviewed by Next Level Manager
SMITH, SARA	ANNL	05/11/2008		Edward Jones
SMITH, SARA	ANNL	07/11/2011		Edward Jones
SMITH, SARA	ANNL	08/11/2013	Michael Owens	

Current Evaluations Wizard

Select an evaluation to review by clicking your name on the line associated with a particular evaluation. This opens the Current Evaluations Wizard, which allows you to review, and if acceptable, sign the evaluation. The following provide information on each section of the Current Evaluations Wizard.

- **General Information**

The **General Information** section displays your general information. Select **Next**, at the bottom of this page, or the **Detailed Ratings** link at the top of the page, to navigate to the **Detailed Ratings** section.

Current Evaluations - General Information

SMITH, SARA

[General Information](#) > [Detailed Rating](#) > Evaluation Acceptance

This section will display employee assignment information in regards to this evaluation

Name: SMITH, SARA **Home Department:** Personal

From: 05/01/2007 **Home Unit:** 010-1010

To: 05/01/2008 **Position:** PERF M MGR1

Evaluation Due Date: 05/11/2008

[Next >](#)

- **Detailed Ratings**

The **Detailed Ratings** section displays the ratings that you have been given, any comments regarding the evaluation, and a list of areas for growth.

Current Evaluations - Detailed Rating

SMITH, SARA

[General Information](#) > [Detailed Rating](#) > [Evaluation Acceptance](#)

This section will display detailed ratings for employee assignment. Select a rating by selecting on the rating listed on the grid. Once you have reviewed the ratings, Click Next to continue

Rating Type	Rating	Number
-------------	--------	--------

[< Previous](#) [Next >](#)


Select the **Rating** to view detailed information for the rating, comments regarding the evaluation, and/or areas for growth.

Line Details

Rating Type: EMPEV **Number:**

Rating Type Desc: PERFORMANCE **Comments:**

Definition of Rating Type: THIS DEFINES HOW THE EMPLOYEE IS RATED ON JOB PERFORMANCE **Areas for Growth:**

Rating Response: EXCEL 

Rating Description: Excellent

Select **Next**, at the bottom of this page, or the **Evaluation Acceptance** link at the top of the page, to navigate to the **Evaluation Acceptance** section.

- **Evaluation Acceptance**

The **Evaluation Acceptance** section displays your Rating Profile and allows you to add any comments you might have regarding the evaluation. If you are satisfied with the evaluation, you can select the **Sign Evaluation** button. The **Generate PDF** button allows you to open a PDF version of the evaluation, which you can then save or print.

You can navigate back to previous sections by using the **Previous** link or by selecting the section name link located at the top of the page. Select **Save** to save your changes and exit the evaluation.

Current Evaluations - Evaluation Acceptance

SMITH, SARA

[General Information](#) > [Detailed Rating](#) > **Evaluation Acceptance**

This section is not included in your evaluation. Click Next to continue

Rating Profile: DEFAULT

Overall Rating:

Rated Employee's Comment:

[< Previous](#) [Sign Evaluation](#) [Generate PDF](#) [Save](#)

Past Evaluations

The Past Evaluations [widget](#) allows you to view your historical evaluations from prior years. Select an evaluation from the list to view the complete evaluation via the Past Evaluations Wizard.

Name	Year	Evaluator Name	Next Level Manager Name	Overall Rating	Evaluation Type
SMITH, SARA	07/01/2010	JANE DOE	JOHN ADAMS	ME	ANNL

Past Evaluations Wizard

Select an evaluation to review by clicking your name on the line associated with a particular evaluation. This opens the Past Evaluations Wizard, which allows you to review an evaluation from a prior evaluation period. The following provide information on each section of the Past Evaluations Wizard.

- **General Information**

The **General Information** section displays your general information. Select **Next**, at the bottom of this page, or the **Detailed Ratings** link at the top of the page, to navigate to the **Detailed Ratings** section.

Past Evaluations - General Information

SMITH, SARA

General Information > [Detailed Rating](#) > Evaluation Acceptance

This section will display employee assignment information in regards to this evaluation

Name: SMITH, SARA	Home Department: Personal
From: 07/01/2010	Home Unit:
To: 07/01/2011	Position:
Evaluation Due Date: 07/11/2011	

[Next >](#)

- **Detailed Ratings**

The **Detailed Ratings** section displays the ratings that you have been given, any comments regarding the evaluation, and a list of areas for growth.

Past Evaluations - Detailed Rating ✖

SMITH, SARA

[General Information](#) > [Detailed Rating](#) > [Evaluation Acceptance](#)

This section will display detailed ratings for employee assignment. Select a rating by selecting on the rating listed on the grid. Once you have reviewed the ratings, Click **Next** to continue

Evaluation Type	Year	Overall Rating
WORK	2007	

< Previous
Next >

Select the **Rating** to view detailed information for the rating, comments regarding the evaluation, and/or areas for growth. Select **Next**, at the bottom of this page, or the **Evaluation Acceptance** link at the top of the page, to navigate to the **Evaluation Acceptance** section.

Line Details ✖

Rating Type: EMPEV

Rating Type Desc: PERFORMANCE

Definition of Rating Type: THIS DEFINES HOW THE EMPLOYEE IS RATED ON JOB PERFORMANCE

Rating Response: EXCEL

Rating Description: Excellent

Number:

Comments:

Areas for Growth:

Save

- **Evaluation Acceptance**

The **Evaluation Acceptance** section displays your Rating Profile and any comments regarding the evaluation that were entered. The **Generate PDF** button allows you to open a PDF version of the evaluation, which you can then save or print.

You can navigate back to previous sections by using the **Previous** link or by selecting the section name link located at the top of the page. Select **Save** to save your changes and exit the evaluation.

Past Evaluations - Evaluation Acceptance

SMITH, SARA

[General Information](#) > [Detailed Rating](#) > Evaluation Acceptance

This section is not included in your evaluation. Click Next to continue

Rating Profile:

Overall Rating:

Rated Employee's Comments:

Current Self Evaluations

The Current Self Evaluations [widget](#) allows you to submit feedback on your performance through Self Performance Evaluations. Additionally, this widget can be used to fill out items such as Exit Interviews. Self Evaluations are created for you by a manager as a shell evaluation. Select a manager-created Self Evaluation from the Current Self Evaluations tab, fill out all relevant information, and select the **Save & Submit** button.

Past entries (in Submitted status) are viewable on the [Past Self Evaluations](#) widget. Upon submission of a Self Evaluation, it will be sent to the appropriate manager for review and approval.

Name	Evaluation Type	Rating	Manager Name
Franks, Doreen	6MOS		JOHN SMITH

Self Evaluation Wizard

Select an evaluation to review by clicking your name on the line associated with a particular evaluation. This opens the Self Evaluation Wizard, which allows you to create a Self Evaluation or review one that has already been created. The following provide information on each section of the Self Evaluations Wizard.

- **General Information**

The **General Information** section displays general information about the Self Evaluation. Here you can enter your employee ID and define the type of Self Evaluation you are creating, (for instance, an Exit Interview). Select **Next**, at the bottom of this page, or the **Ratings** link at the top of the page, to navigate to the **Ratings** section.

Self Evaluations - General Information ✖

Franks, Doreen

[General Information](#) > [Ratings](#) > Performance Evaluations

This section will display employee assignment information in regards to this evaluation

Employee ID :	<input type="text" value="DFRANKS"/>	From :	<input type="text" value="2013-01-22"/>
Appointment ID :	<input type="text"/>	To :	<input type="text" value="03/31/2013"/>
Name :	<input type="text" value="Franks, Doreen"/>	Home Department :	<input type="text" value="010"/>
Union Affiliation :	<input type="text"/>	Home Department Desc :	<input type="text" value="Personal"/>
Union Affiliation Descr :	<input type="text"/>	Evaluation Type :	<input type="text" value="3MOS"/>
Profile :	<input type="text" value="EMPEV"/>	Personnel Action Reason :	<input type="text"/>
Rating Profile Description :	<input type="text" value="EMPEV"/>		
Evaluation Due Date :	<input type="text" value="04/30/2013"/>		

- **Rating**

The **Ratings** section allows you to select a rating type, enter comments regarding the evaluation, and a displays list of areas for growth. You must enter a Rating Response.

Self Evaluations - Rating ✖

Franks, Doreen

[General Information](#) > [Ratings](#) > [Performance Evaluations](#)

This section will display detailed ratings for employee assignment. Select a rating by selecting on the rating listed on the grid. Once you have reviewed the ratings, Click Next to continue

Rating Type	Rating Response	Number	Comments
COMM	AVG		
EMPEV	EXCEL		

Select the **Rating** to view detailed information for the rating, comments regarding the evaluation, and/or areas for growth. Select **Next**, at the bottom of this page, or the **Evaluation Acceptance** link at the top of the page, to navigate to the **Performance Evaluation** section.

Line Details ✖

Rating Type : EMPEV	Number : <input type="text"/>	
Rating Type Desc : PERFORMANCE	Comments : <div style="border: 1px solid gray; height: 80px;"></div>	
Definition of Rating Type : THIS DEFINES HOW THE EMPLOYEE IS RATED ON JOB PERFORMANCE	Areas for Growth : <div style="border: 1px solid gray; height: 80px;"></div>	
Rating Response : EXCEL		
Rating Description : Excellent	<input type="button" value="Save"/>	

- **Performance Evaluation**

The **Performance Evaluation** section allows you to sign the Self Evaluation, indicating that it is ready for manager review and approval.

Self Evaluations - Performance Evaluation ✖

Franks, Doreen

[General Information](#) > [Ratings](#) > **Performance Evaluations**

ctext

Overall Response :	<input type="text" value="ME"/>	Employee Signature Checkbox :	<input type="checkbox"/>
Overall Response Desc :	<input type="text" value="MEETS EXP"/>	Employee Signature Source :	<input type="text" value="Acceptance by Evalu"/>
Evaluation Ready for Employee Review :	<input type="checkbox"/>	Rated Employee's Comments :	<div style="border: 1px solid gray; height: 20px;"></div>

Past Self Evaluations

The Past Self Evaluations [widget](#) allows you to view your historical Self Performance Evaluations. Select the link in the Name column to open the past self evaluation for review.

Name	Evaluation Type	Rating	Manager Name
Franks, Doreen	3MOS	EMPEV	John Smith

Past Self Evaluation Wizard

Select an evaluation to view by clicking your name on the line associated with a particular evaluation. This opens the Past Self Evaluation Wizard, which allows you to view Self Evaluations that were previously submitted. The following provide information on each section of the Self Evaluations Wizard.

- **General Information**

The **General Information** section displays general information about the Self Evaluation. Here you will see your employee ID and general information about the Self Evaluation. Select **Next**, at the bottom of this page, or the **Ratings** link at the top of the page, to navigate to the **Ratings** section.

Self Evaluations - General Information

Franks, Doreen

[General Information](#) > [Ratings](#) > Performance Evaluations

This section will display employee assignment information in regards to this evaluation

Employee ID :	DFRANKS	From :	2013-01-22
Appointment ID :		To :	03/31/2013
Name :	Franks, Doreen	Home Department :	010
Union Affiliation :		Home Department Desc :	Personal
Union Affiliation Descr :		Evaluation Type :	3MOS
Profile :	EMPEV	Personnel Action Reason :	
Rating Profile Description :	EMPEV		
Evaluation Due Date :	04/30/2013		

[Next >](#)

- **Rating**

The **Ratings** section displays your rating types and any comments regarding the evaluation.

Self Evaluations - Rating ✖

Franks, Doreen

[General Information](#) > [Ratings](#) > [Performance Evaluations](#)

This section will display detailed ratings for employee assignment. Select a rating by selecting on the rating listed on the grid. Once you have reviewed the ratings, Click Next to continue

Rating Type	Rating Response	Number	Comments
COMM	AVG		
EMPEV	EXCEL		

< Previous
Next >

- **Performance Evaluation**

The **Performance Evaluation** section displays information on when the Self Evaluation was signed and approved.

Self Evaluations - Performance Evaluation ✖

Franks, Doreen

[General Information](#) > [Ratings](#) > [Performance Evaluations](#)

ctext

Overall Response :	<input type="text" value="ME"/>	Employee Signature Checkbox :	<input type="checkbox"/>
Overall Response Desc :	<input type="text" value="MEETS EXP"/>	Employee Signature Source :	<input type="text" value="Acceptance by Evalu"/>
Evaluation Ready for Employee Review :	<input type="checkbox"/>	Rated Employee's Comments :	<input type="text"/>

Expectations

The following [widgets](#) can be found on the Expectations sub tab:

- [Current Expectations](#)
- [Past Expectations](#)

Current Expectations

The Current Expectations [widget](#) allows you to view your current performance expectations for a given period. Select an evaluation from the list to view the complete evaluation via the Current Evaluations Wizard.

After reviewing the expectations, you can select the **Sign Expectations** button to indicate your acceptance of the expectations. Your name and the date you signed the expectations will then be displayed. Once your manager has also signed the expectations, the manager's name and date of signing will also be displayed. Once an expectation has been signed, they will no longer display in the Current Expectations widget, but will be moved to the [Past Expectations](#) widget.

Select the Expectation link to open a window that displays the detailed explanation of the expectation. Select the **Generate PDF** button to open a PDF version of the expectations that can be saved or printed.

Current Expectations [3]

To view your Expectations, click on an expectation below to launch a pop up window with the full text of the expectation. Once you have reviewed each of the expectations, click the Sign button to accept the expectations.

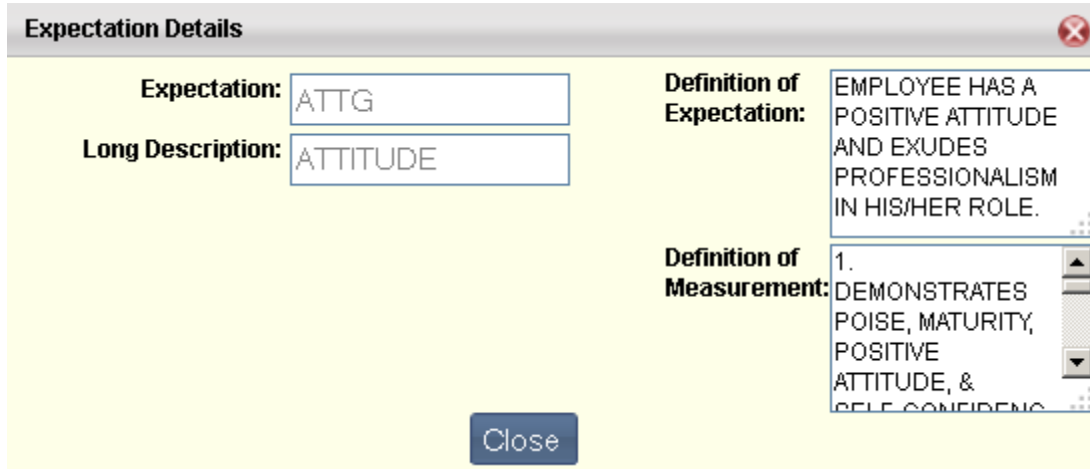
Expectation	Definition of Expectation	Definition of Measurement
ATTG	EMPLOYEE HAS A POSITIVE ATTITUDE AND EXUDES PROFESSIONALISM IN HIS/HER ROLE.	1. DEMONSTRATES POISE, MATURITY, POSITIVE ATTITUDE, & SELF-CONFIDENCE IN THE ACCOMPLISHMENT OF TASKS & COMMUNICATION W/OTHERS. 2. ACCEPTS SUGGESTIONS FOR IMPROVING QUALITY OF WORK & DEVELOPS 3. PROJECTS AND PROFESSIONAL BEARING TOWARD CUSTOMER PERSONNEL
WORK	THE EMPLOYEE COMPLETES ASSIGNED WORK BY THE DESIGNATED DUE DATE. THE EMPLOYEE WORKS INDEPENDENTLY, BUT ASKS QUESTIONS WHEN NECESSARY.	NO WORK DEADLINES ARE MISSED, EMPLOYEE WORKS INDEPENDENTLY BUT ASKS FOR ASSISTENCE AS APPROPRIATE
COMPT	COMPETENCY	EMPLOYEE PERFORMS AT LEVEL OF COMPETENCY EXPECTED

Employee Name:
Date Signed:

Manager Name:
Date Signed:

Viewing Expectation Details

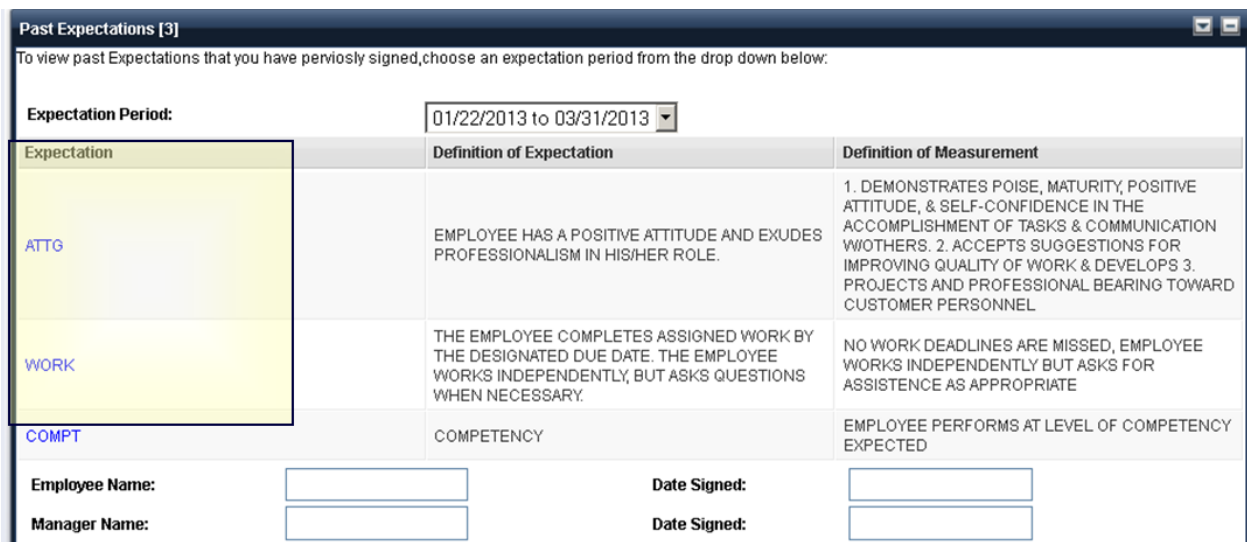
Select an expectation to open a pop up window where you can view a full explanation of the expectation. The **Expectation Details** window displays the **Definition of Expectation** and the **Definition of Measurement** for the expectation.



Past Expectations

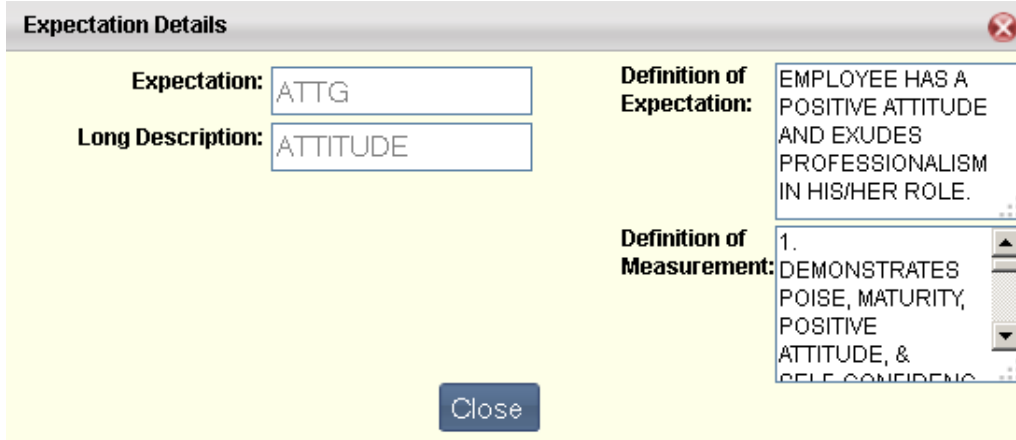
The Past Expectations [widget](#) allows you to view your prior expectations for a given period. The Expectation Period field allows you to select, from a drop down list, expectations from the previous five years. At the bottom of the widget, your name, your manager's name, and the date you each signed the expectations is displayed.

Select the Expectation link to open a window that displays the detailed explanation of the expectation.



Viewing Expectation Details

Select an expectation to open a pop up window where you can view a full explanation of the expectation. The **Expectation Details** window displays the **Definition of Expectation** and the **Definition of Measurement** for the expectation.



Workers' Comp Tab

The Workers' Comp tab allows you to view, create, or modify workers' compensation claims. The following [widget](#) can be found on the Worker's Comp tab:

- [Claims](#)

Claims

The Claims [widget](#) allows you to view, create, or modify workers' compensation claims, which captures data related to the processing of a workers' compensation claim during the entire life cycle of the claim. Claims are separated by Open Claims, Closed Claims, and Rejected Claims.

Claims that are not yet submitted, or are pending approval, are not displayed on the Workers' Comp Claims widget. These are available via the In Progress tab of the [My Work](#) widget.

On this screen, you can create, modify and view information pertaining to your workers compensation claims.

Open Claims Closed Claims Rejected Claims

Claim Reference Number	Injury Date	Claim Status	Effective Date	Expiration Date	Modify
000000000122	01/05/2011	CLAIMED STATUS	01/07/2013	12/31/9999	
000000000124	01/05/2011	CLAIMED STATUS	01/07/2013	12/31/9999	
000000000153	01/03/2011	CLAIMED STATUS	04/09/2013	12/31/9999	
000000000154	01/20/2011	CLAIMED STATUS	04/09/2013	12/31/9999	

Create Claim

Create Claim

The **Create Claim** button opens the Claim document, which allows you to initiate a workers' compensation claim. The Claim document allows you enter basic information required to make an initial accident or injury report.

The **General Information** section allows you to enter information such as when, where, and how the injury or illness occurred, the type of claim and the status of the claim, your current work status (i.e., are you out of work due to the injury or illness, working part-time, etc.), was there a police report filed, is there an attorney involved, did you see a doctor or have a hospital stay, etc.

? X
Claim Document

General Information > [Claim Details](#)

MYCLAIM1 - Fill out the following document to provide information regarding your claim.

General Information

<p>Claim Reference Number: <input style="width: 150px;" type="text"/></p> <p>Appointment ID: <input style="width: 150px;" type="text"/> </p> <p>*Claim Type: <input style="width: 150px;" type="text"/> </p> <p>*Claim Status: <input style="width: 150px;" type="text"/> </p>	<p>*Injury Date: <input style="width: 80px;" type="text"/> </p> <p>*Injury Time (e.g. 01:30 PM): <input style="width: 120px;" type="text"/></p> <p>*Work Status: <input style="width: 150px;" type="text"/> </p>
--	--

Claim Information

Police Report Number: <input style="width: 120px;" type="text"/>	Attorney: <input style="width: 120px;" type="text"/>
--	--

Reporting

<p>*What time did you begin work on the day of your injury? (e.g. 08:30 AM) <input style="width: 200px; height: 30px;" type="text"/></p> <p>*What were you doing? <input style="width: 200px; height: 30px;" type="text"/></p> <p>*What happened? <input style="width: 200px; height: 30px;" type="text"/></p> <p>*What was the injury or illness? <input style="width: 200px; height: 30px;" type="text"/></p> <p>*What object or substance directly harmed you? <input style="width: 200px; height: 30px;" type="text"/></p> <p>*What part of your body sustained the injury? <input style="width: 200px; height: 30px;" type="text"/></p>	<p>Physician's Name: <input style="width: 120px;" type="text"/></p> <p>Hospital Name: <input style="width: 120px;" type="text"/></p> <p>Hospital Street 1: <input style="width: 120px;" type="text"/></p> <p>Hospital Street 2: <input style="width: 120px;" type="text"/></p> <p>Hospital City: <input style="width: 120px;" type="text"/></p> <p>Hospital State: <input style="width: 100px;" type="text"/> </p> <p>Hospital Country: <input style="width: 100px;" type="text"/> </p> <p>Hospital Zip/Postal Code: <input style="width: 120px;" type="text"/></p> <p>Emergency Room Visit: <input type="checkbox"/></p> <p>Overnight Hospital Stay: <input type="checkbox"/></p>
--	--

The **Claim Details** section allows you to track information such as incident plans, doctor visits, follow up calls, payments, and injury plans.

For each activity related to the Claim, select the **Add Line** button and enter the relevant information. You can also copy an existing line or delete a line by selecting the icons in the Copy Line and Delete Line columns.

To add additional lines to the claim, select the **Add Line** button, to add a blank line, or use the Copy icon to copy a line that you can modify as needed for a new claim detail line.

Once all information has been entered and you **Submit** the Claim, it will be sent to the appropriate HR administrator or manager for approval.

Open Claims, Closed Claims, and Rejected Claims tabs

The Open Claims section displays workers' compensation claims that are currently open or active. Select the Create Claim button to create a new claim or the Edit icon on the line of an open claim you would like to change.

The Closed Claims section displays your claims that are no longer open. You may select the View icon on the line of a closed claim for which you would like to view detailed information, but further changes will not be allowed.

The Rejected Claims section displays your submitted claims that were rejected. Comments from the approver are displayed in the Document Comments column. Select the Edit icon to open the claim, make any necessary changes, and resubmit the claim.