General Information for Employees

Self Service Workplace enables employees to perform the following functions in both a desktop and a mobile-friendly environment. Choose one of the following items for more detailed information:

Benefits

- **My Benefits** – view/print a summary of currently enrolled benefits.
- **SECA Enrollment** – annual enrollment screen for SECA Charities.
- **Total Compensation Statement** - identifies all the compensation paid via wages to an employee, and, in addition, employer contributions made towards benefits and taxes on an employee's behalf, for a calendar year.
- **My Benefits Enrollment** – enroll in benefits plans such as medical, dental or retirement.

Leave and Time

- **Display Absences** - display absences approved by your manager.
- **My Timesheet** – submit working time for manager approval.
- **My Leave Request** - submit new leave requests and leave cancellations as well as view the status of all leave requests.

Personal Information

- **My Addresses** – view permanent and mailing addresses as well as view and make updates to emergency contact information.
- **My Contact Information** – view work email address as well as view and update personal e-mail address.
- **Direct Deposit/Bank Information** **-** view Main Bank account and view/update/end any existing Secondary Bank account(s). (Note: As added security, employees must enter their Secondary Bank account number to make any modifications such as deposit amounts/percentages or ending deposits to an account.) (Note 2: The scrolling features on this application will behave somewhat differently from the other Self Service Workplace applications.)
- **My Family Members** **–** view dependent and beneficiary information saved in the system.

- **Education Information** – view and update degrees and certifications earned.

- My External Organizations – view and update Charity organizations, trust funds, employee's estate and other organizations.

- **Ethnicity / Race** – view and update your cultural background.

- **My Personal Data** - display basic personal and employment information. (Note: As added security, employees must enter their Date of Birth to access this application.)

Payroll

- **W-4 Withholding** - display or update W-4 tax information.

- **Display W-2 Form** – display, download, or print your electronic W-2 form.

- **Update W-2 Election** – choose to receive an electronic or paper W-2 form.

- **Direct Deposit/Bank Information** - view Main Bank account and view/update/end any existing Secondary Bank account(s). (Note: As added security, employees must enter their Secondary Bank account number to make any modifications such as deposit amounts/percentages or ending deposits to an account.) (Note 2: The scrolling features on this application will behave somewhat differently from the other Self Service Workplace applications.)

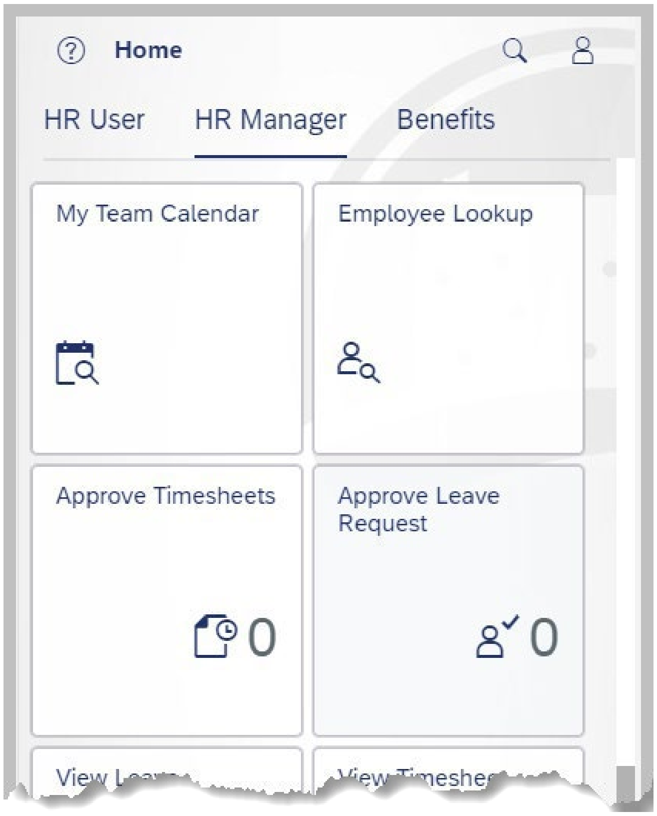
- **My Paystubs** – view and print paystubs.

General Information for Managers

Self Service Workplace enables managers to perform the following functions in both a desktop and a mobile-friendly environment. Choose one of the following items for more detailed information:

- **My Team Calendar** – view team member calendars as well as build group calendars across departments.
- **Employee Lookup** – lookup contact information of employees within the organization. Managers can also view direct reports of colleagues.
- **Approve Timesheets** – approve/reject timesheets for direct reports.
- **Approve Leave Request** – approve/reject employee leave and leave cancellation requests.
- **View Leave Requests Processed by Me** – display a detailed listing of all leave requests that you as the approver have either approved, rejected, or approved for cancellation.
- **View Timesheet Processed by Me** – display a detailed listing of all time entries, such as overtime, that the manager has either approved or rejected for direct reports.
- **My Team** – provides general data about direct reports, such as their personnel number, position, cost center, and organizational unit. For managers who have additional organizational units within their own organizational unit, this application also provides the same information on employees who are not direct reports when the “All Employee” filter is applied.

- **Absence Quota (Staff)** – view the absence quotas for direct reports for the current leave calendar year. For managers who have additional organizational units within their own organizational unit, this application also provides the same information on employees who are not direct reports when the "All Employee" filter is applied.

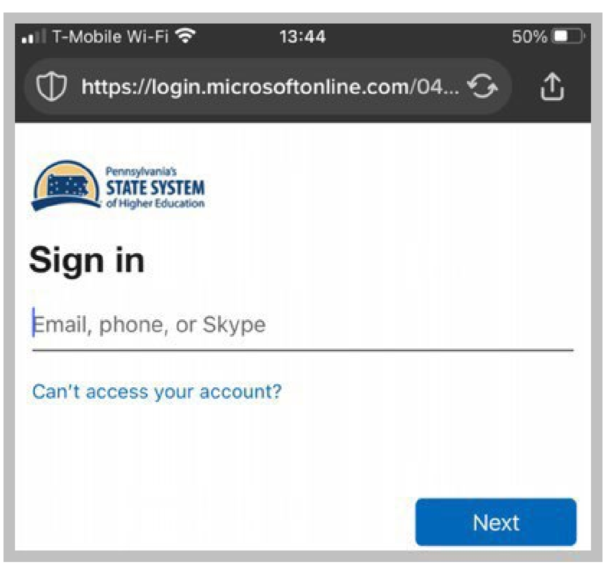


Logging into Self Service Workplace

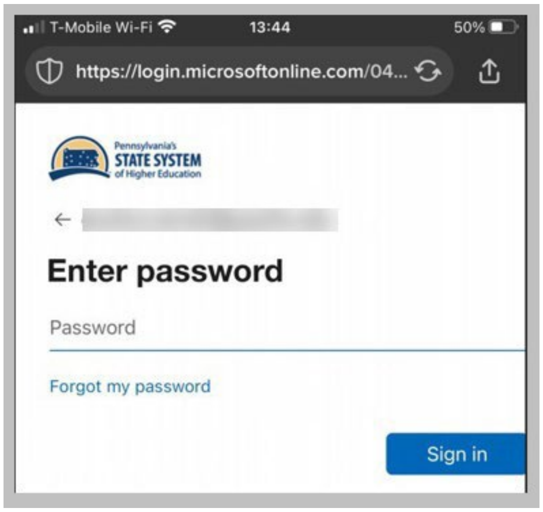
1. Visit https://workplace.passhe.edu on your desktop or mobile browser.

2. Select your university from the drop-down menu provided then click Continue to begin the multi- factor authentication (MFA) process.

3. Enter the username and click Next.

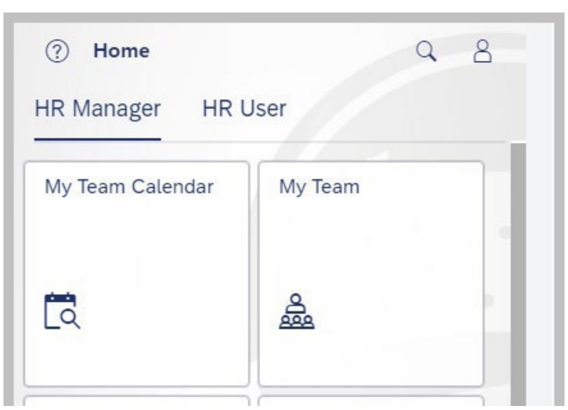


4. Enter the password and click Sign in.



5. Users will receive a multi-factor authentication code which requires entry into Microsoft Multifactor Identification application. Follow the prompts on your Microsoft Multifactor Identification application to complete entry.

6. Once logged in, the Home screen below will appear where individual Self Service Workplace applications can be accessed. (Note: This screenshot illustrates a manager's access within Self Service Workplace. Non-manager employees will not



see the HR Manager section.)

   a. While using any of the following applications, click the Home icon to return to the main Self Service Workplace screen.

HR Manager Self Service Workplace Application Features

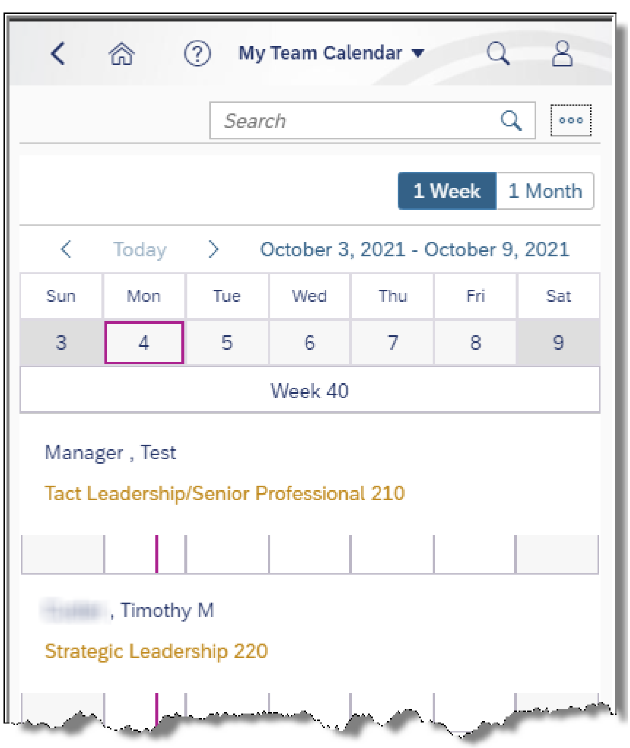
1. **My Team Calendar** – Enables managers to view calendars of direct reports as well as calendars of their own manager colleagues.

Key Features

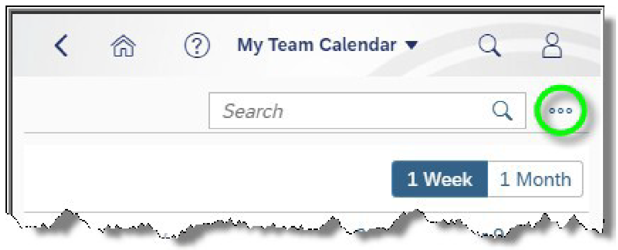
- View upcoming absences/trainings of colleagues or for employees reporting directly to you.
- Add additional customized calendar views and assign any employees to them.
- Hide the display of employees by hiding them from the lists of colleagues, direct reports, or employees in customer views.

a. Click **My Team Calendar** to begin.

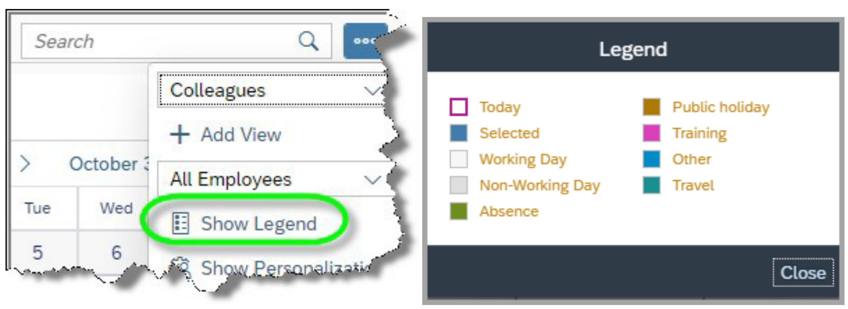
b. The default page upon opening the tile is the **Colleagues** view. This will provide calendar details for the manager as well as colleagues who are also managers within the same department.



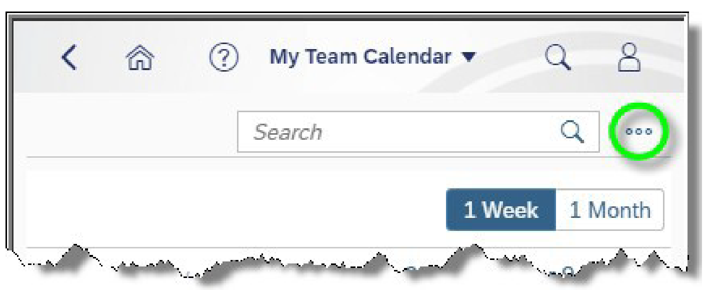
Note: To display the calendar legend, select this icon to the upper right of the screen.



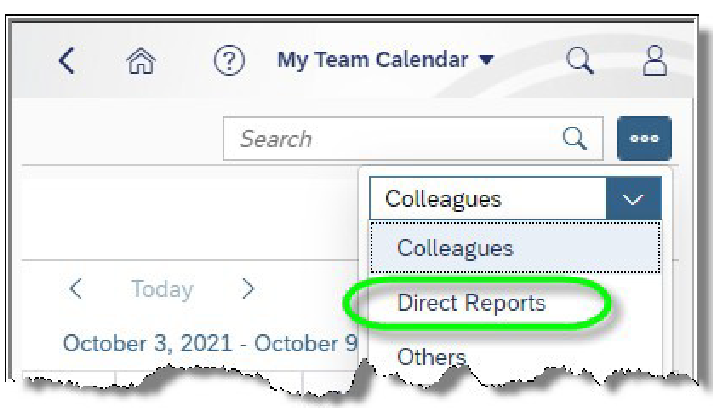
Next, select Show Legend, and the Legend will appear.



c. The second view option for managers is **Direct Reports**. To access this view, select this icon to the upper right of the screen.

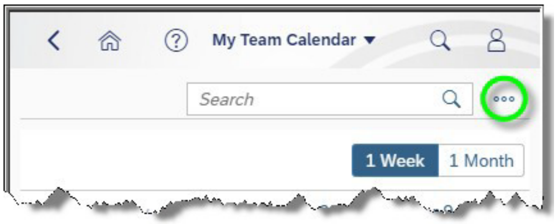


Next, select Direct Reports from the drop-down box.

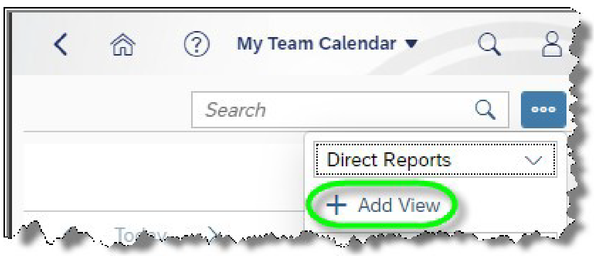


This will provide calendar details for the manager as well as the employees who are within the manager's reporting line.

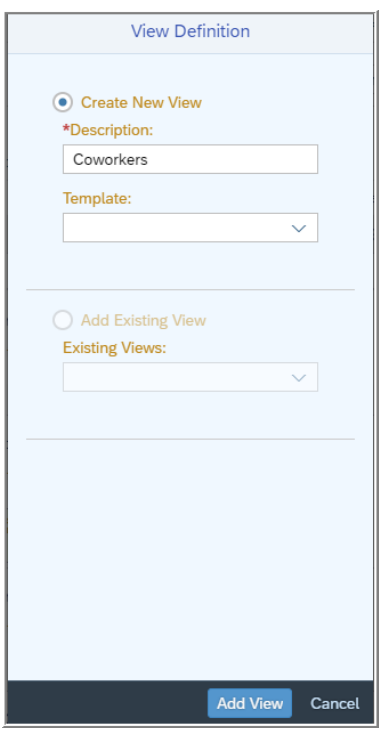
d. Users have the option of creating personalized calendars. For example, users may wish to have a calendar view that contains colleagues with whom they interact with on a regular basis. To create a customized calendar, click the following icon.



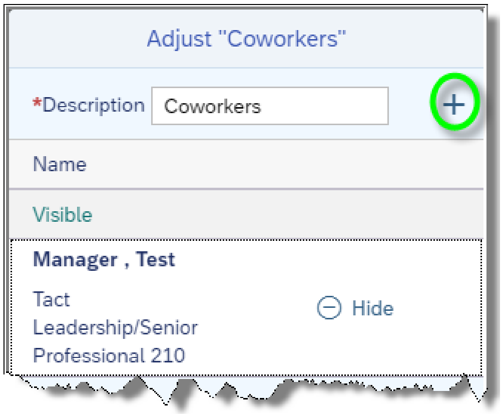
Next, select Add View.



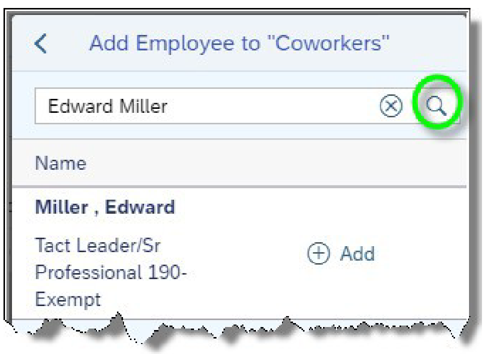
i. Enter a name for the view to be created. Optionally, the Template drop-down allows the user to make a copy of an existing calendar view that will automatically bring in employees that may also need to be on the custom view. Select Add View. (Note: The Existing Views is not applicable.)



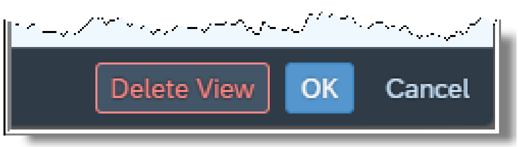
ii. Select the following icon to add employees to the custom view.



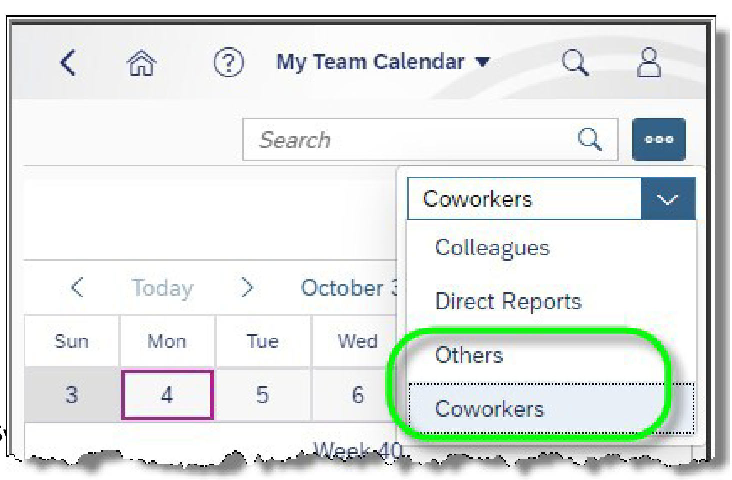
iii. Enter the employee's name to be searched and click the magnifying glass. Find the associated employee and click the plus sign next to Add. Continue adding as many employees as desired.



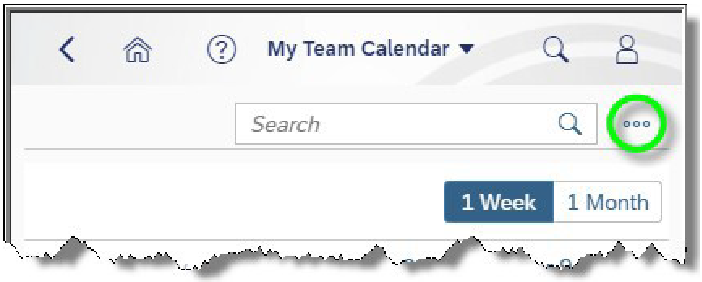
iv. When finished, select OK to finalize adding the employee to the custom calendar.



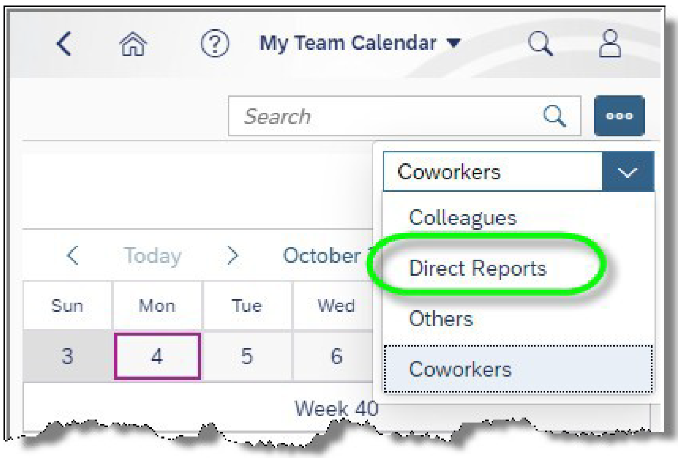
v. The custom calendar will now be available for use.



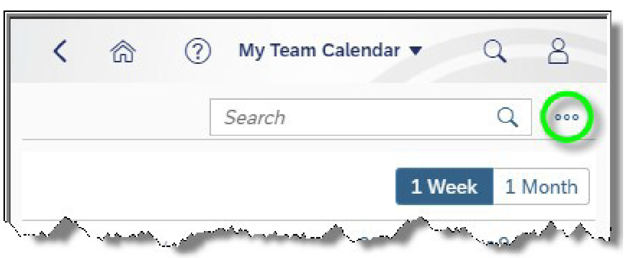
vi. To modify any calendar view, select the following icon:



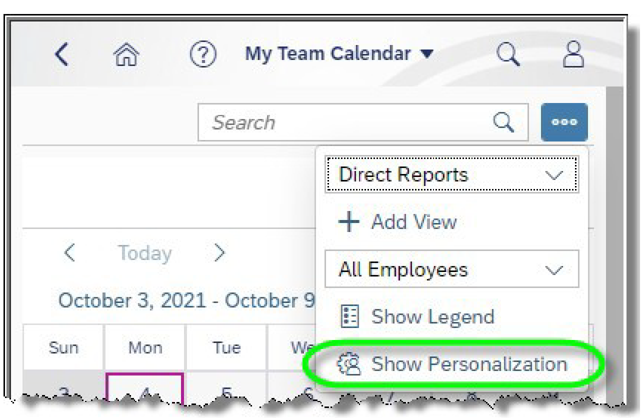
Select the calendar view to be modified.



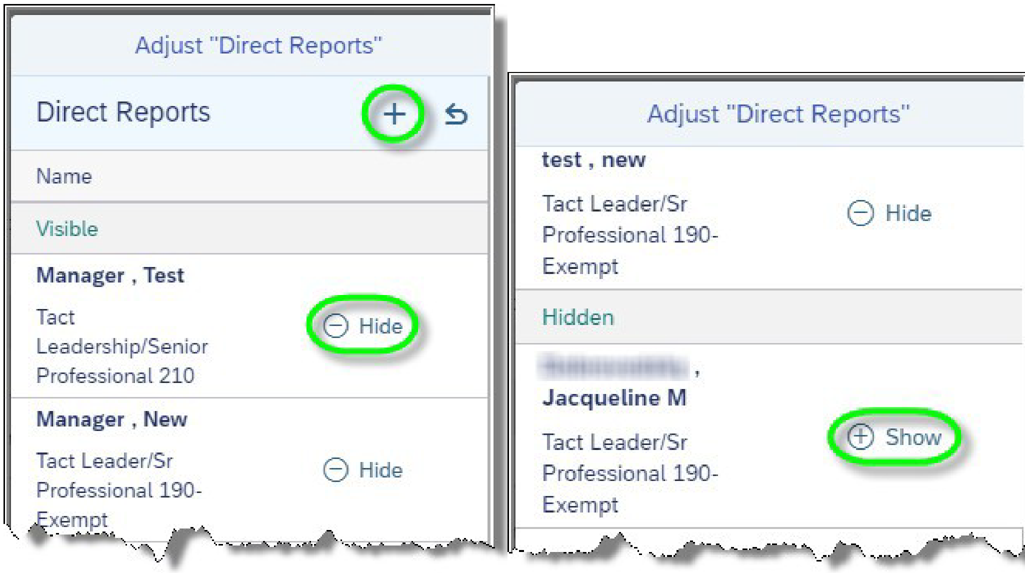
vii. Click this icon again.



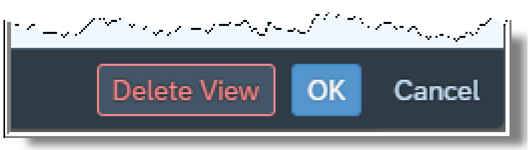
viii. Click Show Personalization.



From here, additional employees can be added by clicking the plus sign, or existing employees can be hidden or removed as desired.

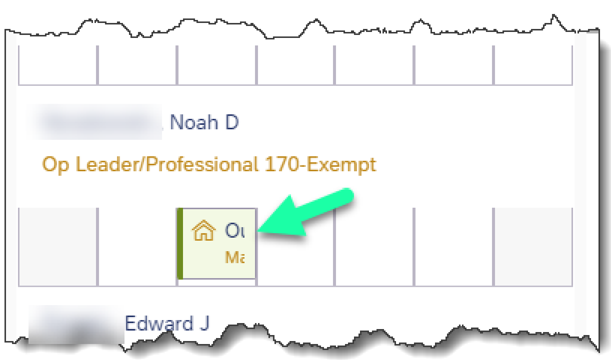


ix. When finished making changes, select OK to save updates, or to delete a customized view entirely, select Delete View.



Note: The Colleagues and Direct Reports view cannot be deleted; however, employees can be hidden from view as desired.

e. To view the details of an employee event listed on the calendar, simply click on the event.

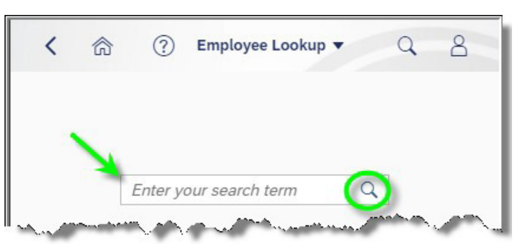


When finished viewing details for the event, click Close.

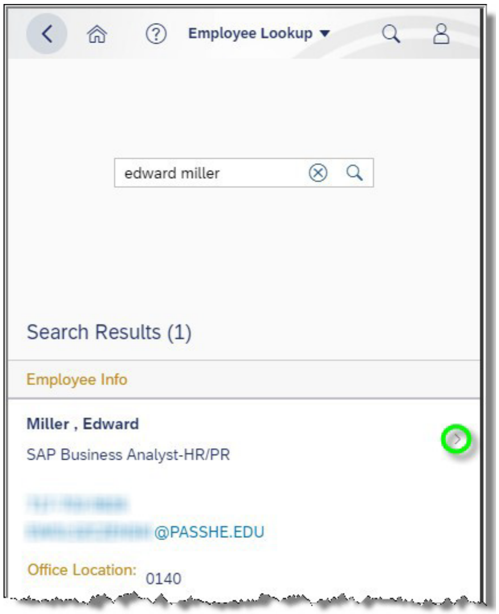
2. **Employee Lookup -** enables managers to lookup contact information of employees within the organization. Managers can also view direct reports of colleagues.

   Click **Employee Lookup** to begin.

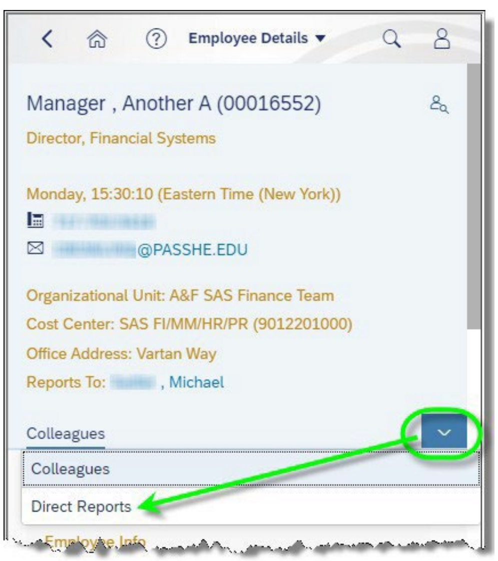
   a. Enter the name of the employee on which to search for information and click the magnifying glass icon. A first name, last name, or a combination can be used in the search.



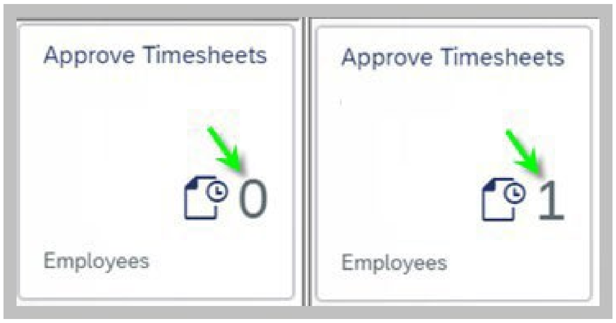
b. Employees matching the search will be listed. Email, phone, and office location will be listed if available. Clicking the arrow will display any colleagues associated with the employee.



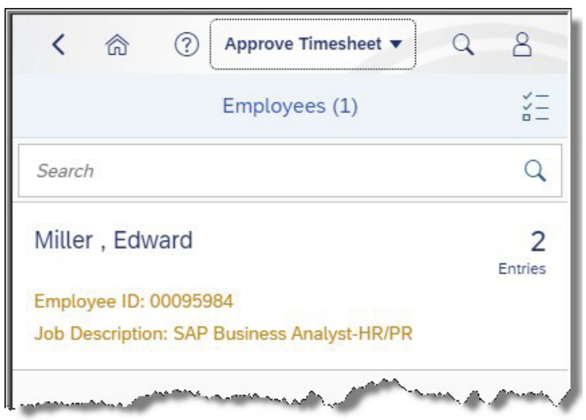
c. If the employee is a manager, the manager's colleagues will display by default. To display the manager's direct reports, click the down arrow and choose Direct Reports.



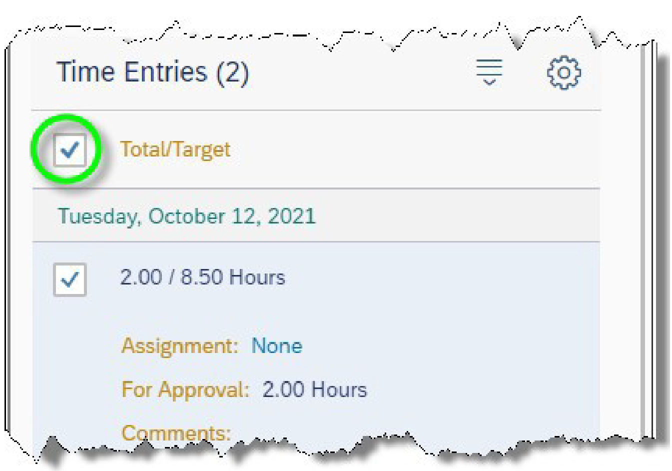
3. **Approve Timesheets** – enables managers to approve/reject employee timesheets. If '0' appears in the application tile, this means there are no timesheets pending processing. Any number other than '0' indicates the number of employees with timesheets pending processing.



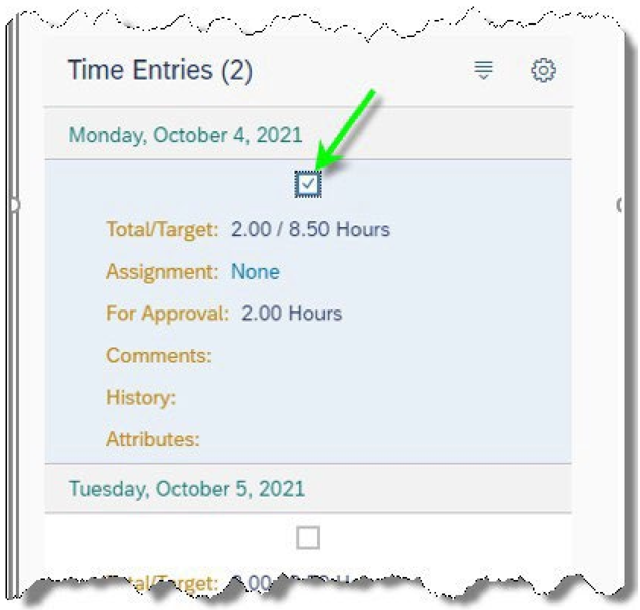
a. Click **Approve Timesheets** to begin processing employee timesheets. In this example, there is one employee with two timesheet entries pending processing. Click the box to approve or reject the entries.



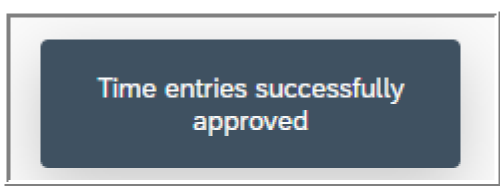
b. If processing all entries for the employee in the same manner (i.e., process all as Approve or process all as Reject), click the checkbox for Total/Target as shown to select all entries to be processed in batch.



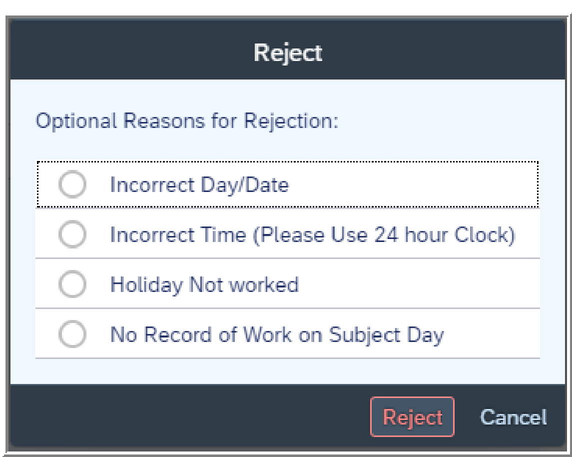
Note: Time entries can be processed independently by clicking the checkbox inside each individual time entry. This is useful when some entries need to be rejected while others will be approved.



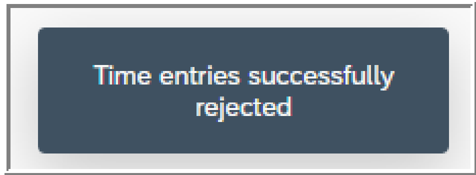
c. When approving time entries, the following message will be displayed upon clicking the Approval button.



d. When rejecting time entries, the following window will appear for optional input as to the reason for rejecting the time entries. Time can be rejected without choosing a reason.



e. The following message will be displayed upon clicking the Reject button

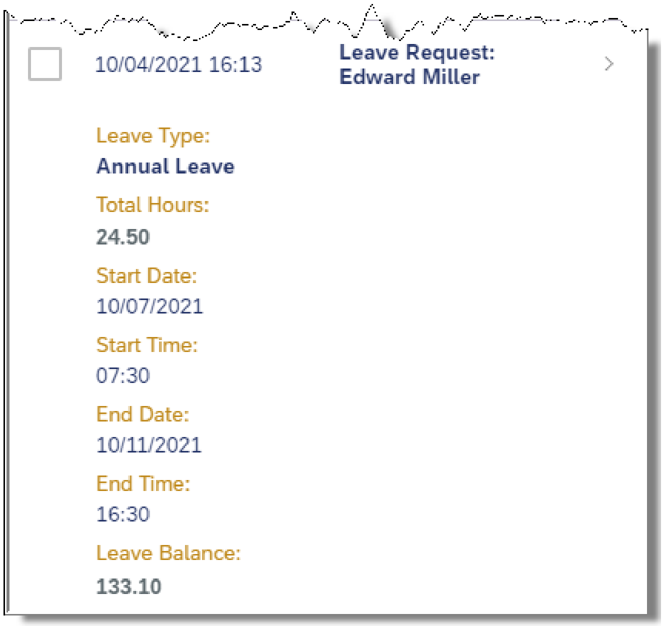


4. Approve Leave Request - enables managers to approve employee leave requests.

If '0' appears, this means there are no leave requests pending processing. Any number other than '0' indicates the number of leave requests pending processing.

a. Click **Approve Leave Request** to begin processing employee leave requests.

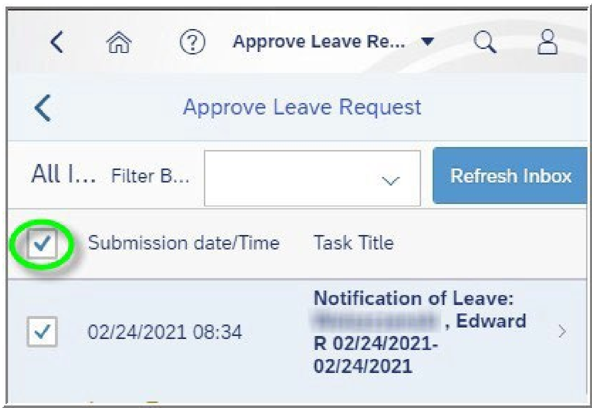
b. To review the requests that appear in the inbox and determine whether to approve or reject requests, the following details are provided to the manager: Leave Type, Total Hours requested off, Start Date/Time and End Date/Time as well as remaining Leave Balance of the employee.



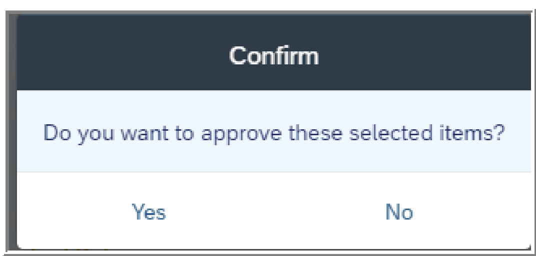
c. Additional details such as employee remarks can be found by clicking the arrow where shown.

d. To return to leave processing, Click the arrow where shown.

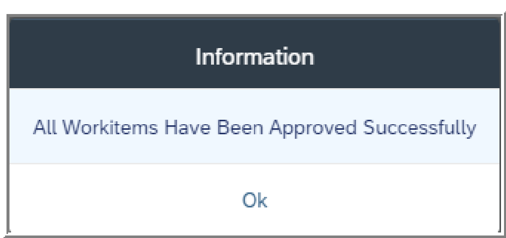
e. If processing all of the leave requests in the inbox as Approve or conversely as Reject, Click the checkbox circled. This will automatically select all leave requests to be processed. To deselect any checkbox, Click the box again to remove it from processing.



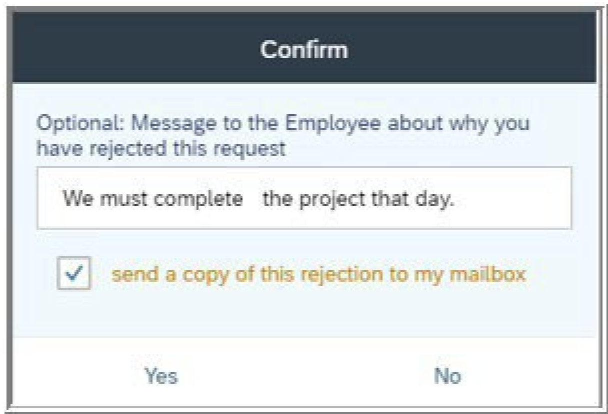
f. Clicking Approve will display the following pop-up. Click the Yes to finalize processing.



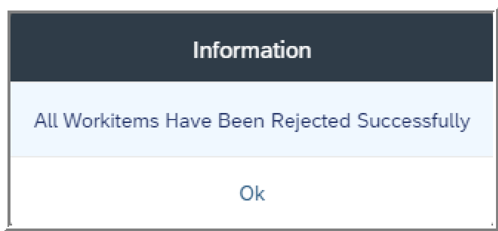
i. When Yes is chosen, the following message will appear for approvals.



g. Clicking Reject will display the following pop-up where the manager has the option to provide comments as well as send a copy of the rejection to their own email inbox.



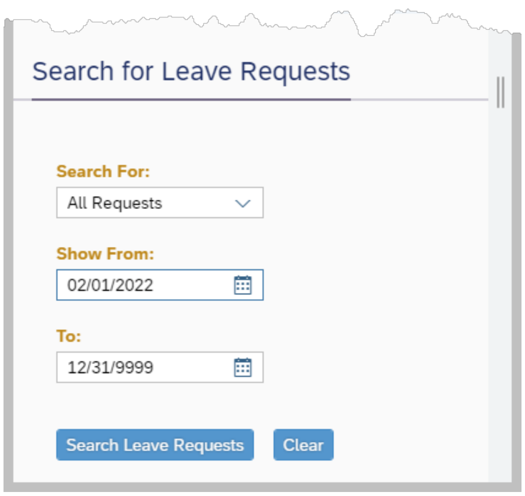
i. When Yes is chosen, the following message will appear for rejections.



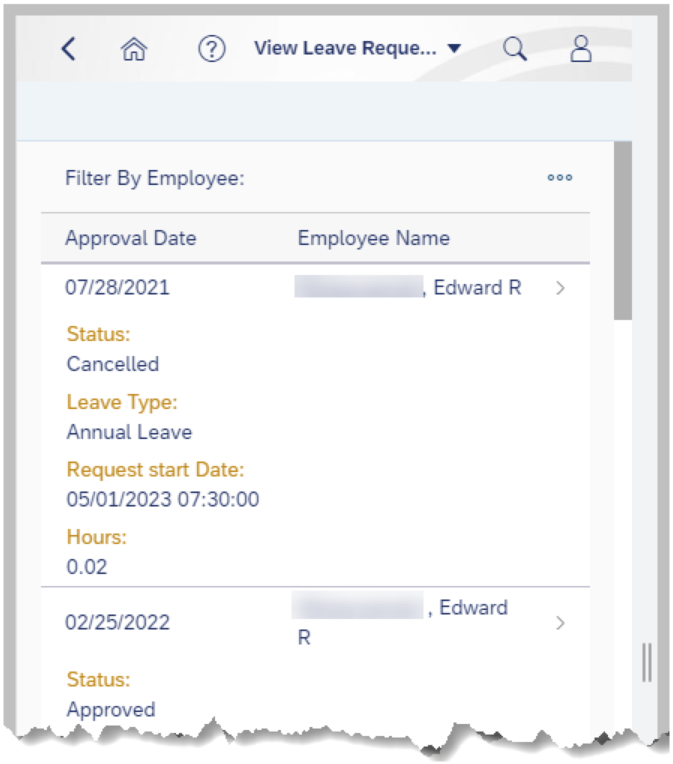
5. **View Leave Requests Processed by Me** – display a detailed listing of all leave requests that you as the approver have either approved, rejected, or approved for cancellation.

   a. Click **View Leave Requests Processed by Me** to search for leave requests.

   b. Enter the desired search parameters then click Search Leave Requests.



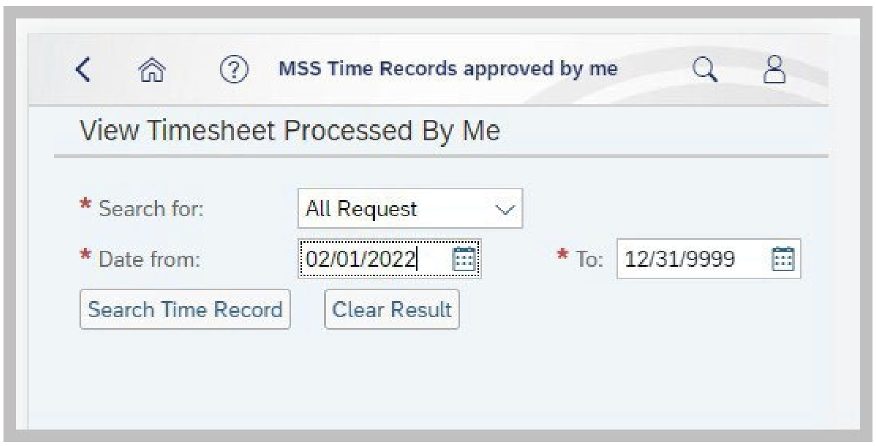
c. Results will appear that can be filtered by employee. To view more details on a processed leave request, simply click the related request.



6. **View Timesheet Processed by Me**– display a detailed listing of all employee timesheets that you as the approver have either approved or rejected.

   a. Click **View Timesheet Processed by Me** to search for processed timesheets. Enter the desired search parameters.

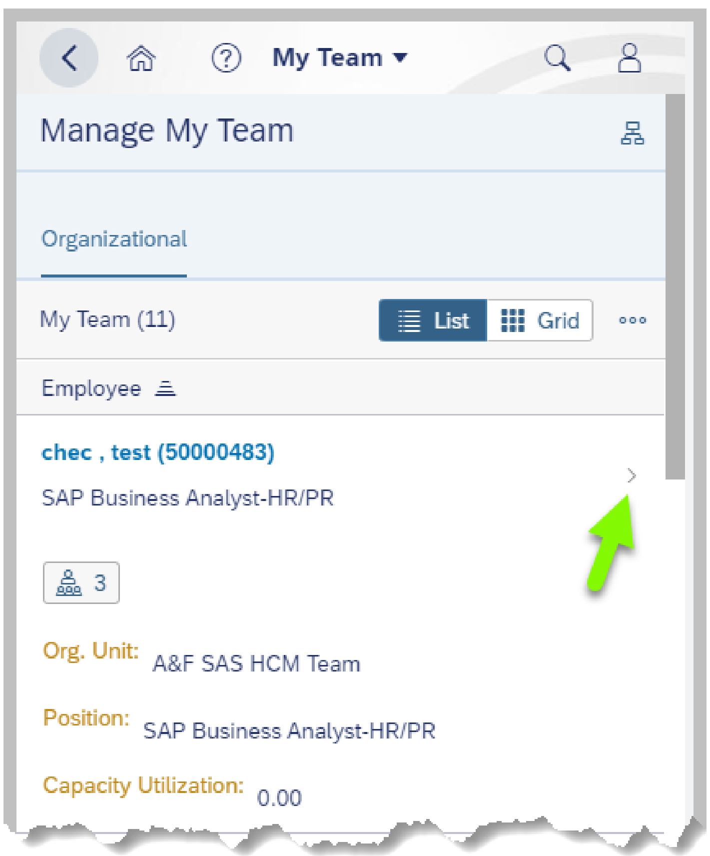
   b. Enter search parameters as desired and select Search Time Record.



7. **My Team** – provides general data about direct reports, such as their personnel number, position, cost center, and organizational unit. For managers who have additional organizational units within their own organizational unit, this application also provides the same information on employees who are not direct reports but are in a "subordinate" department.

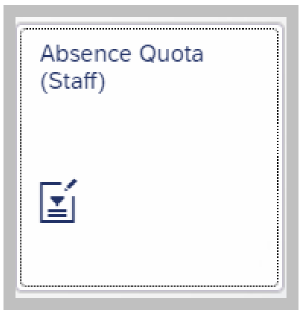
   a. Click **My Team** to begin.

   b. Employee information will appear for review. To see additional information on a specific employee, click the right arrow where indicated.

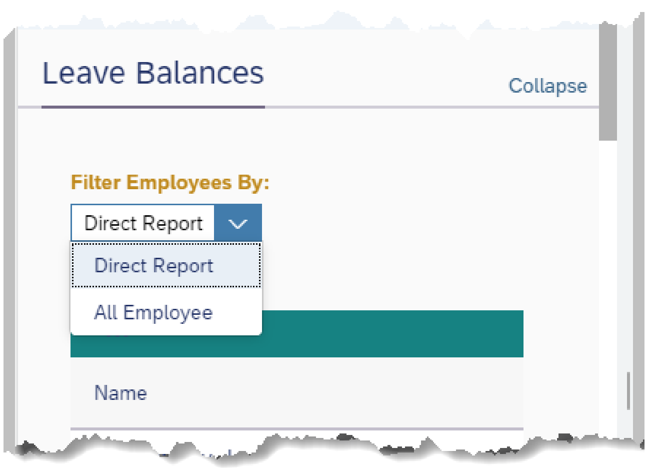


8. **Absence Quota (Staff)** – view the absence quotas for direct reports for the current leave calendar year. For managers who have additional organizational units within their own organizational unit, this application also provides the same information on employees who are not direct reports when the "All Employee" filter is applied.

    a. Click **Absence Quota (Staff)** to begin.

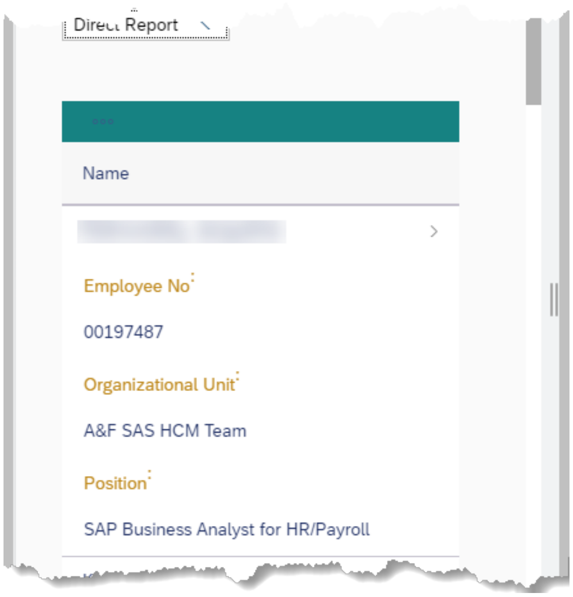


    b. To only view data for direct reports, click Direct Report. For managers who have additional organizational units within their own organizational unit and wish to see employee data in that category, click All Employee. Clicking All Employee will list all direct reports as well as employees in subordinate departments within the same organizational structure.

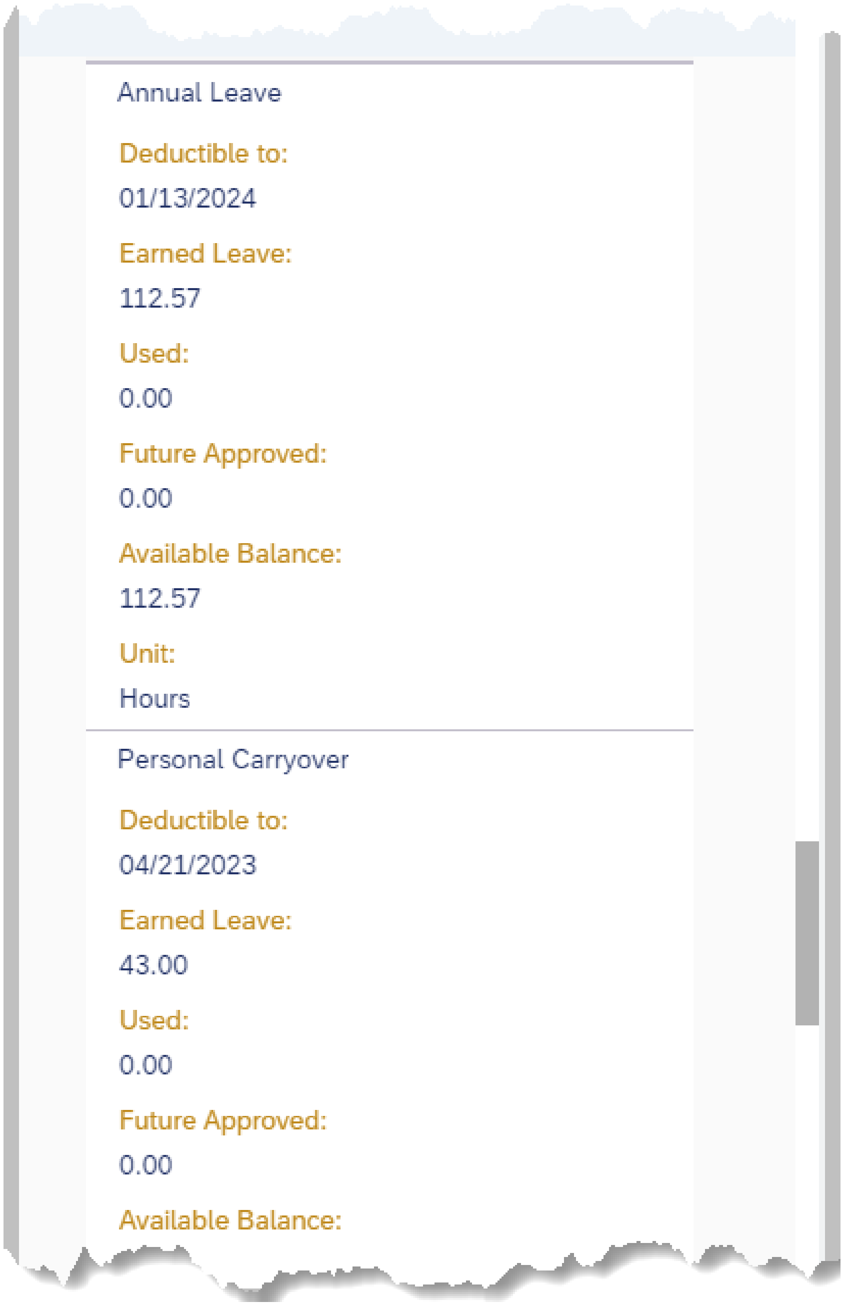


c. Choose the employee for whom to display leave balance details by clicking on the related tile. (It may be necessary to scroll to the bottom of the list to view the employee's details.)

Example: Click this tile -



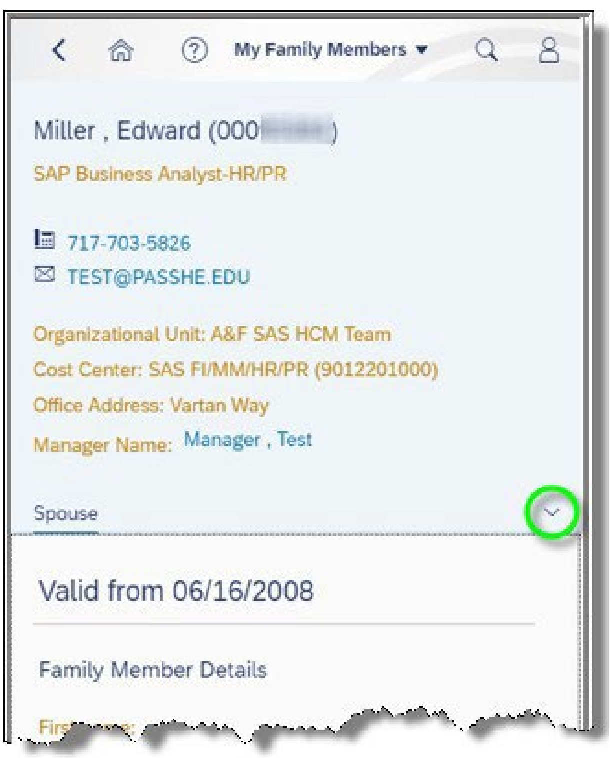
Then scroll to the bottom of the list to see the leave balance details.



HR User Self Service Workplace Application Features

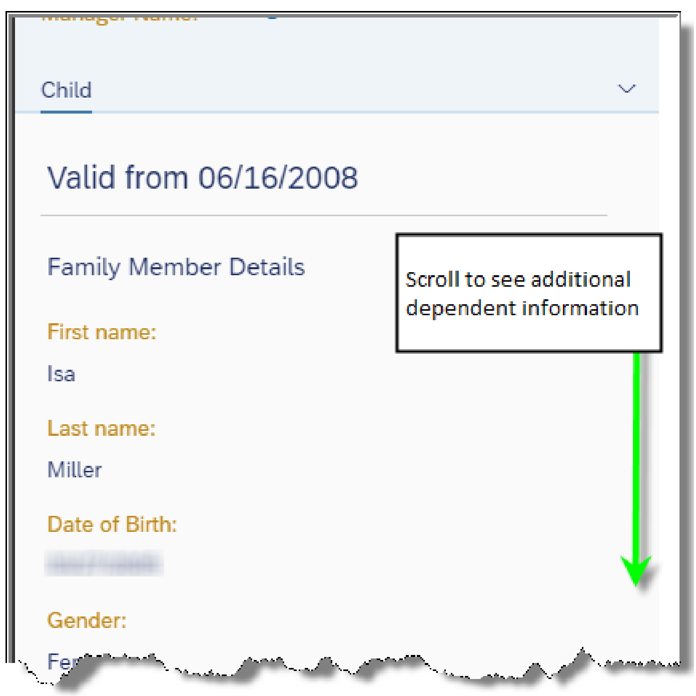
1. **My Family Members** – enables employees to view dependent and beneficiary information saved in the system. Dependents are those who can be attached to medical plans, while beneficiaries can be attached to insurance plans. Changes to dependent and beneficiary information is not permitted through this application.

   a. Click **My Family Members** to begin. To view additional dependents/beneficiary information, Click the drop-down arrow for additional selections.



b. Click the dependent/beneficiary type to view details.

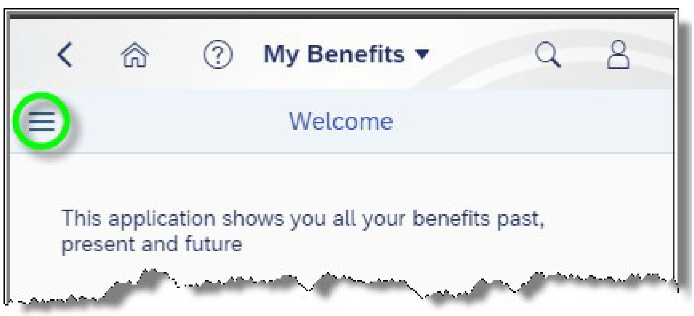
c. When a dependent/beneficiary type has multiple entries in the system, they will all appear under that type. For example, this user has multiple children, so the user will need to scroll to see details for all children dependents.



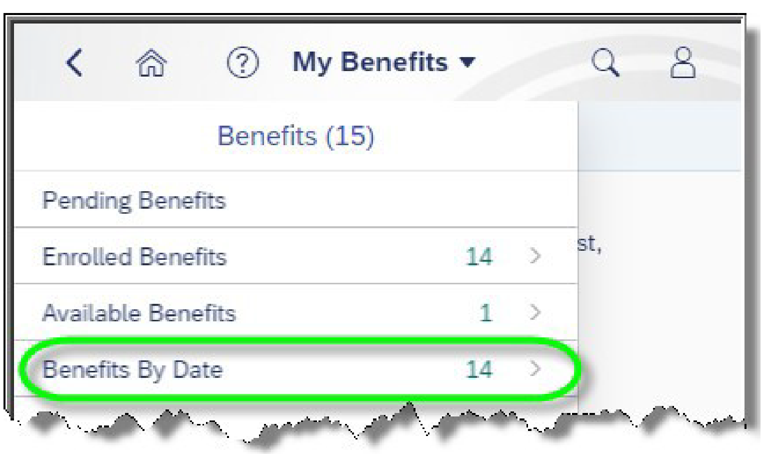
2. **My Benefits** – enables employees to view currently enrolled benefits. At this time, employees cannot make changes to their benefits using the Self Service Workplace application.

a. Click **My Benefits** to begin**.**

b. Next, click the following icon:



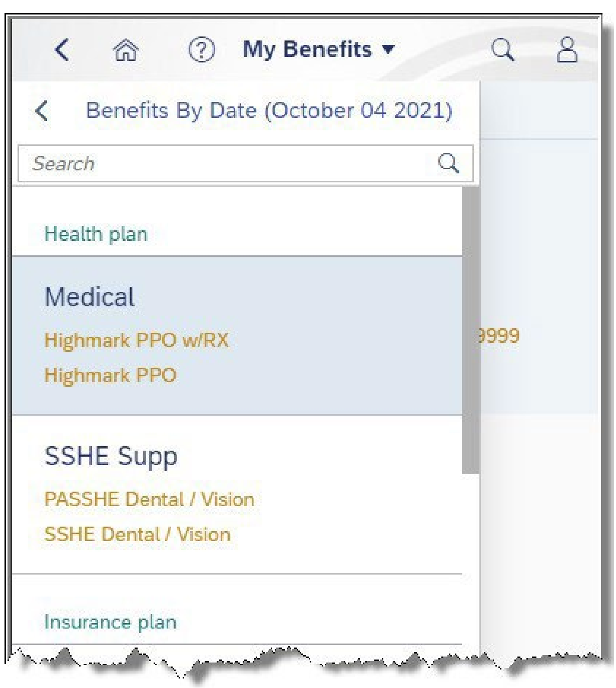
c. For the best experience, users should select Benefits By Date. (Note: The remaining delivered Self Service Workplace application features do not apply to State System use.)



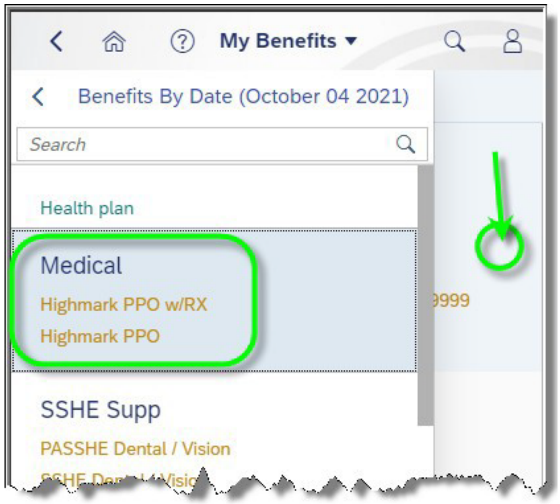
i. To change the effective date for the plans to display, click Change Date at the bottom of the window.

ii. To download a summary of benefits in PDF format for viewing, saving or printing, click Download Summary. This will allow users to view and print a summary of their enrolled benefits. Both the Change Date and Download Summary features are available at all times, while using the My Benefits application.

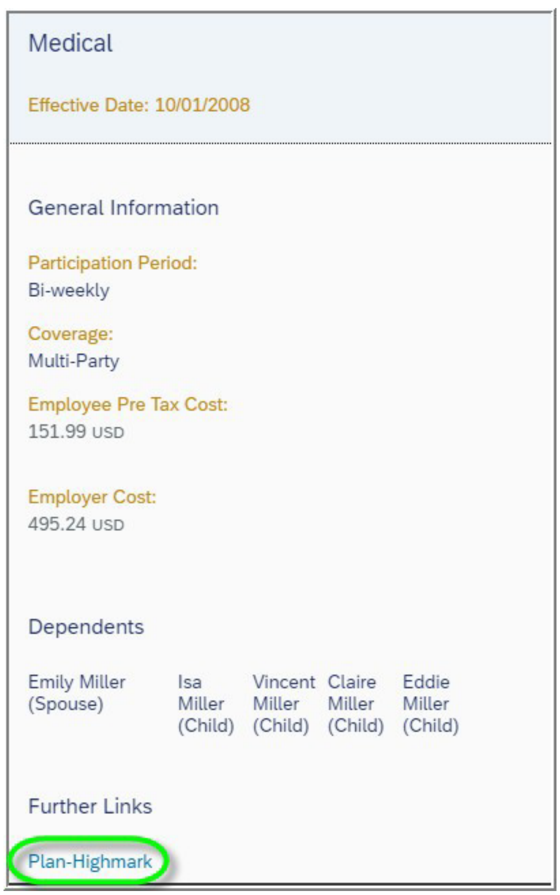
d. Once in the view of Benefits By Date, users can scroll through their enrolled benefits.



e. To see additional details related to a particular plan, click the desired plan to highlight it. Next, click in the window area to the right.



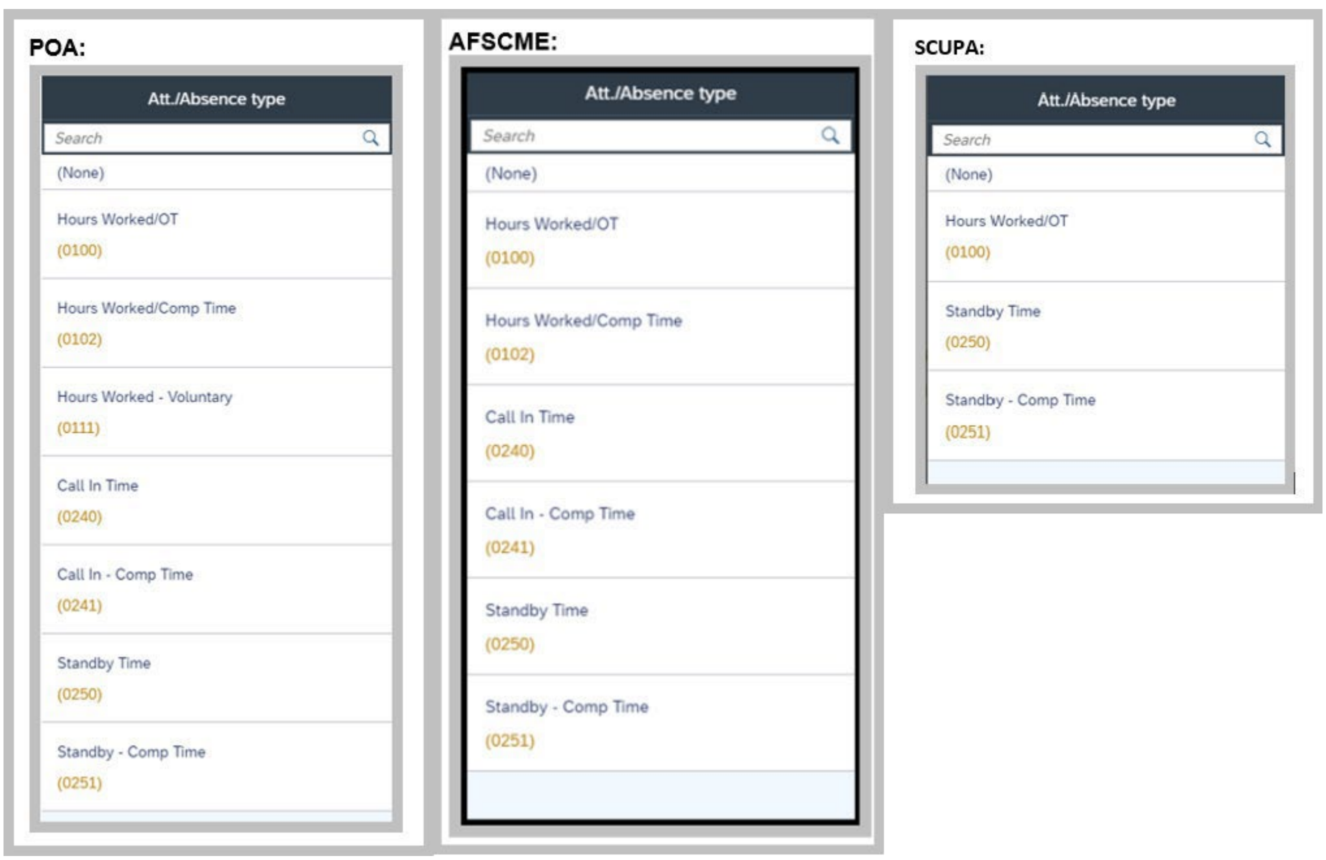
f. Additional plan information will be displayed to the user including additional links to further information regarding the plan.



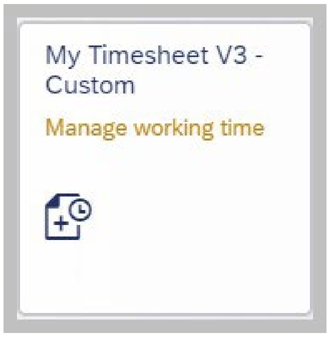
g. To return to the plan selection window, click the icon as shown and repeat this process as needed.

3. **My Timesheet**– enables employees to enter/report time worked and overtime. Once time is submitted on the *My Timesheet V3* screen, it is routed to the employee's supervisor for review and approval/rejection.

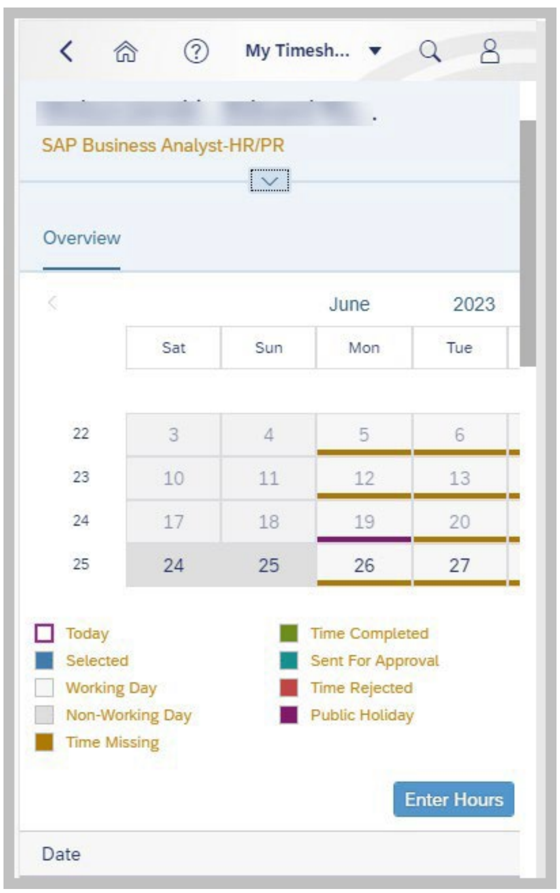
   Before getting started, it is important to recognize that different bargaining units (unions) will display different time types for utilization in My Timesheet. Below are some examples of the time type variations by bargaining unit:



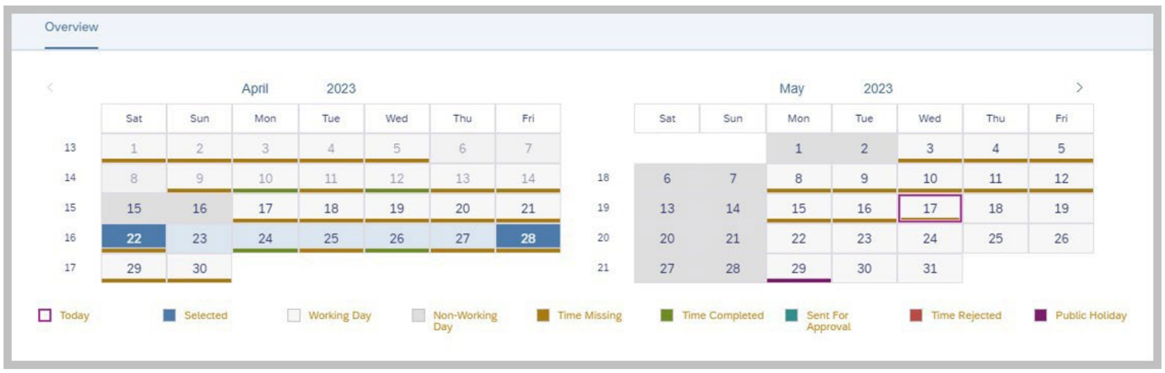
a. Click **My Timesheet** to begin entering time.



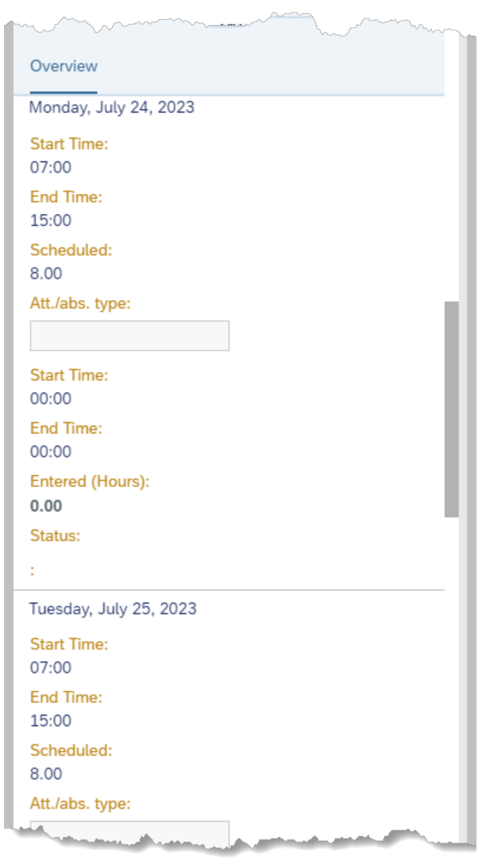
b. Employees have access to a legend at the bottom of the display, which will assist in understanding the colors used on the calendar at the top of the screen.



c. The Calendar section provides an overview of overtime that has been entered by the employee along with the processing results. In this example, in April, the employee had overtime approved for April 24 and April 26, 2023, as indicated by the "Time Completed" green underlined dates. Then for May 15 and 17, 2023, the employee submitted additional overtime for approval that has yet to be processed by the employee's supervisor as indicated by the "Sent for Approval" dark green underlined dates and the "Submitted" Status.

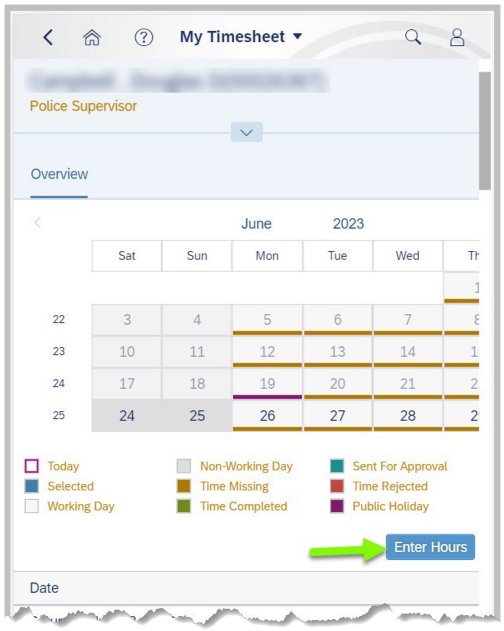


d. The Timesheet section is where employees can enter time. In this example, the current system date is 7/27/2023, so the system will display the schedule (Start Time, End Time, Scheduled (Hours)) that overlaps with that week.

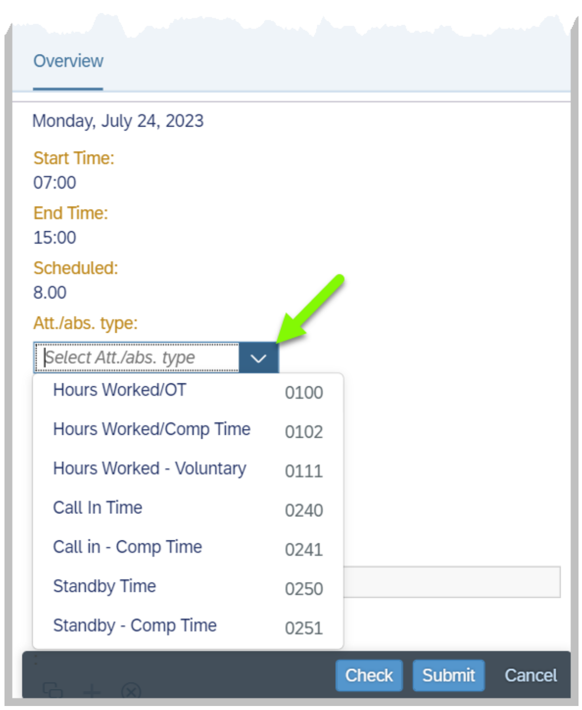


e. Once the correct set of dates is displayed, the following actions should be taken by the employee to properly enter/submit time.

i. Click Enter Hours.

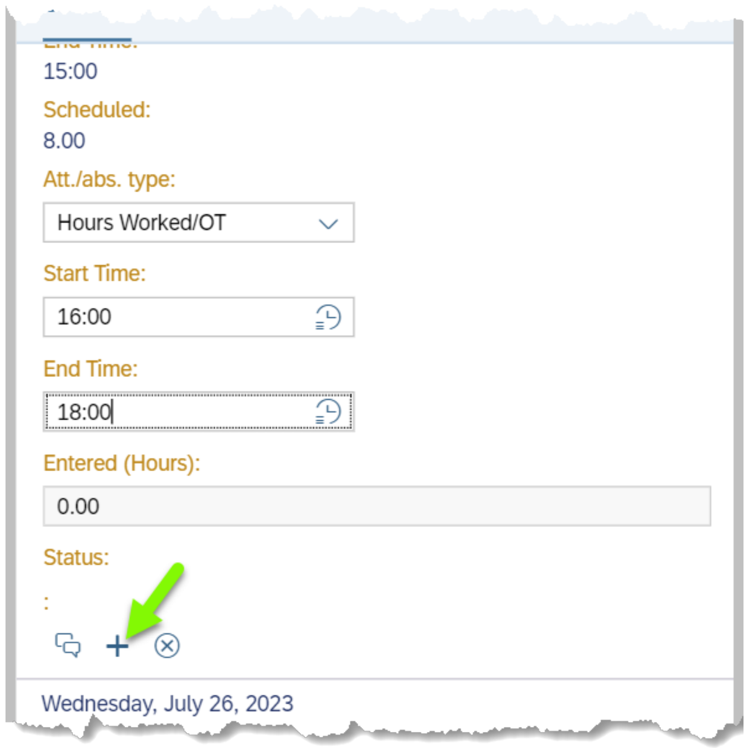


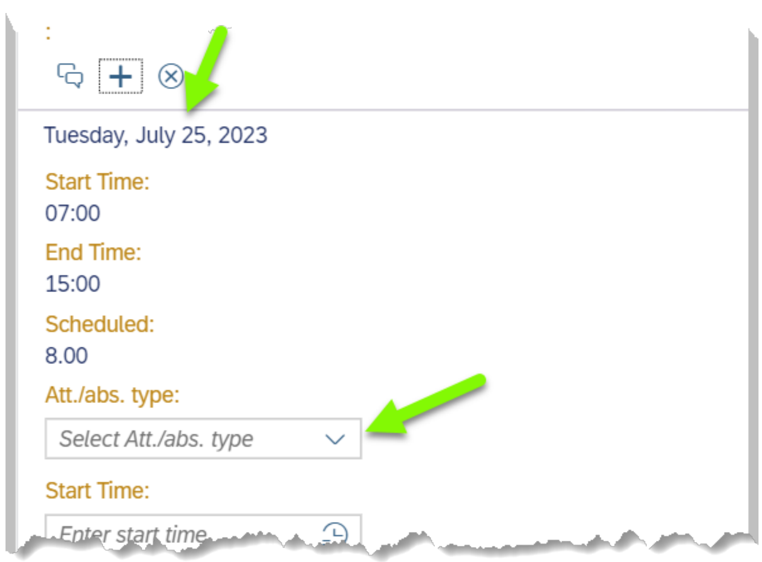
ii. Locate the specific date for time entry and click the Att./abs.type field to display the time types available. (Note: The time types appearing for use will vary depending on the employee.) Click the time type to be used for entry.



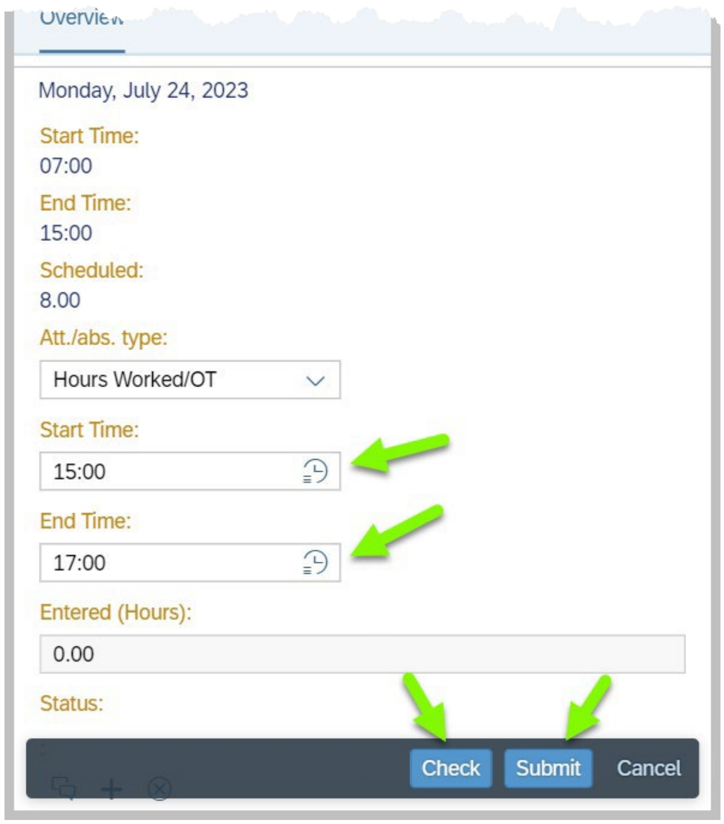
iii. Enter the Start Time and End Time in the appropriate fields. Hours must be entered in military time format. In this example, the employee's normal schedule on Monday is from 7:00 until 15:00, but the employee wants to enter two hours of overtime past 16:00. In this example, the employee entered 15:00 to 17:00 to indicate 2 hours of overtime worked. (**NOTE:** If an employee needs to enter time that covers more than one day, please see the section **Entering time that spans more than a single day** below.)

NOTE: If entering more than one time type on a single date, enter the first time type and associated hours and then click the + icon to insert another timesheet with the same date where additional entries can be made in similar fashion.



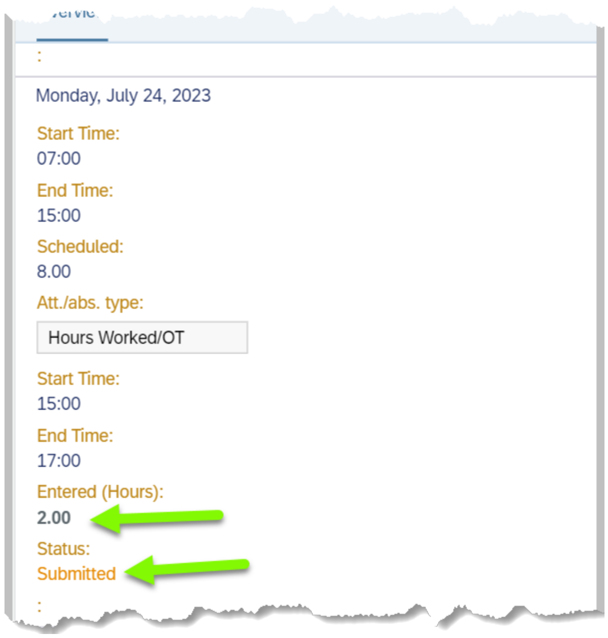


iv. When finished making all timesheet entries, click Check to validate the entry and then click Submit to submit the timesheet for processing.



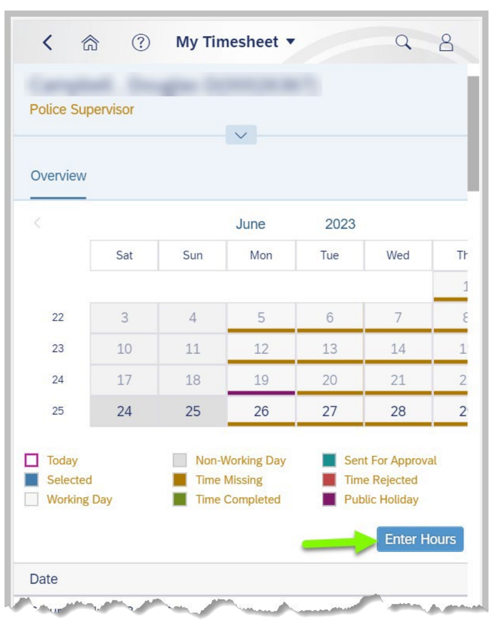
v. A message will be displayed indicating the data has been saved and Submitted to the employee's supervisor.

f. Once submitted for processing, the Entered (Hours) will display with the total number of hours for the time entry along with the Status.

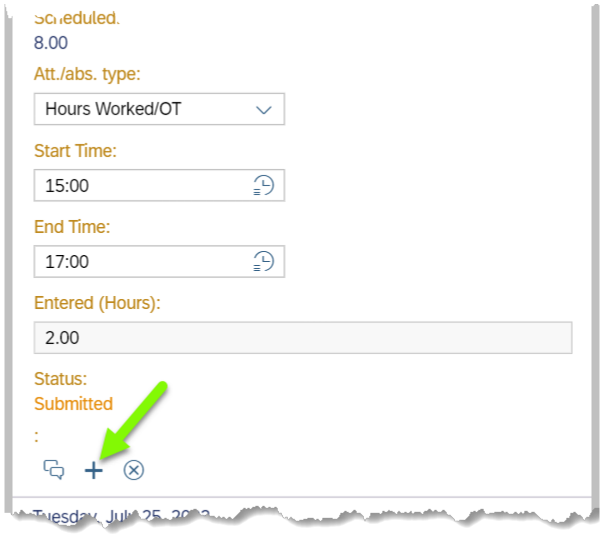


g. If entering more than one time type on a single date *after* the first entry has already been submitted, perform the following steps.

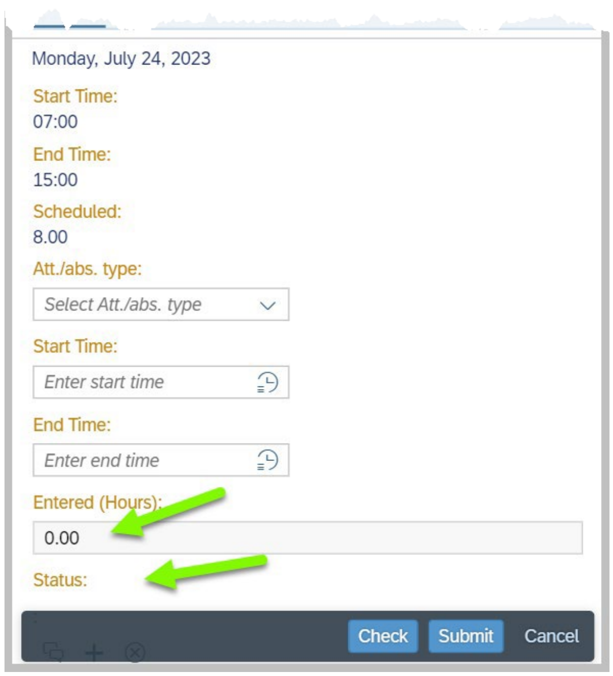
i. Click Enter Hours.



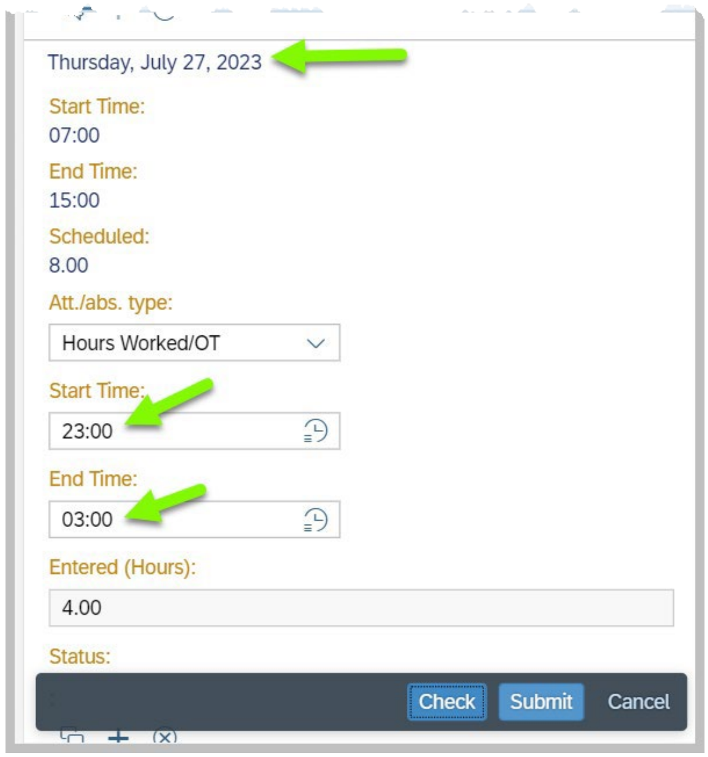
ii. Locate the date for which two separate time types need to be entered and click the + icon to insert a row.



iii. A “blank” timesheet for the same date will be created where additional time entries can be entered and submitted. Follow the steps above to complete the process.



h. Entering time that spans more than a single day - Example scenario: An employee's shift begins at 22:00 on July 27, 2023 and ends on July 28, 2023 at 03:00. The time entry must be entered using the day the shift began, which in this case is July 27. Time entries must be in military time for accurate calculation as shown.

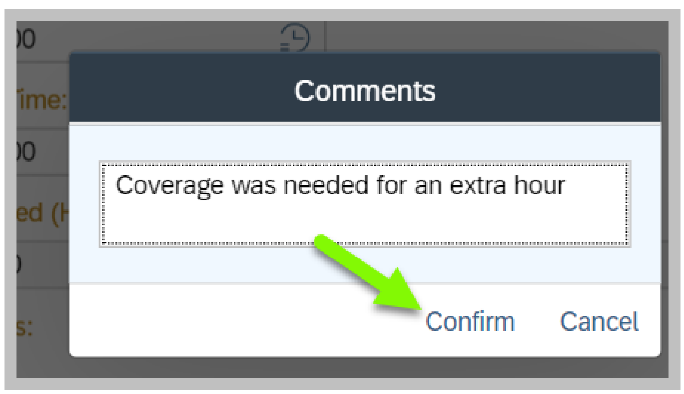


i. Deleting a Timesheet – First click Enter Hours to open the timesheet section for edit. Next, click the icon shown to delete the entry. Then click Submit to save the entries. A message indicating the Time Entries were saved successfully will be displayed.

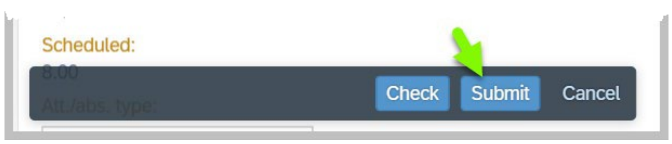
j. **Adding Comments to Timesheets –** Employees can provide comments or notes to managers via timesheet submissions.

i. Click the icon where indicated.

ii. Within the "Comments" window, the employee can enter notes such as a special cost center or a reason for the overtime for their manager to review in the Manager's "Approve Timesheet" application. Once notes have been entered, select Confirm.



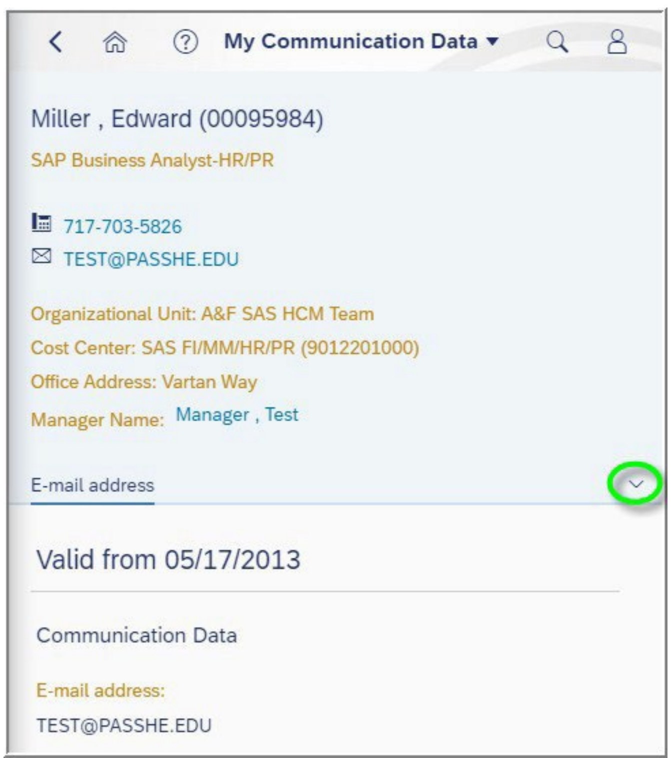
iii. Users must still Submit the timesheet information for the changes to be saved.



4. **My Contact Information Data** – enables employees view work email address as well as view and update personal e-mail address.

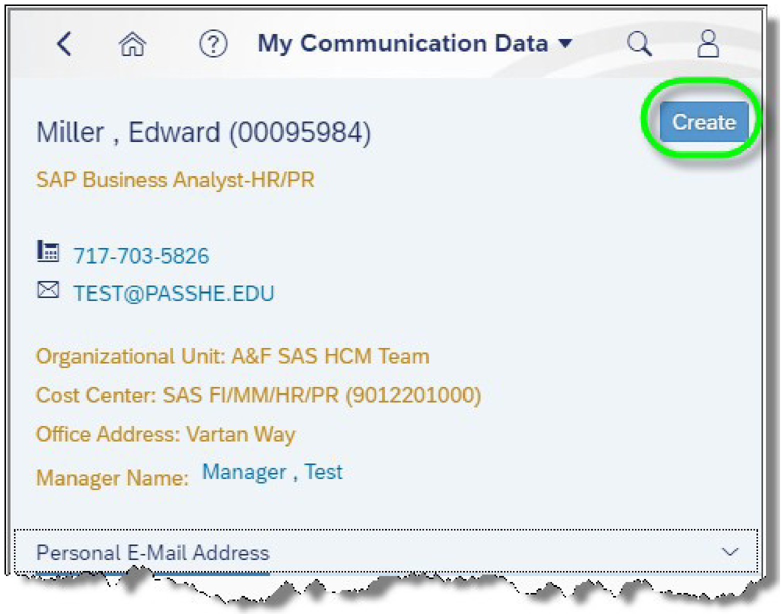
   a. Click **My Contact Information** to begin.

   b. The default page will show employee work phone, work email, and manager name. To view/edit personal email address, click the drop-down arrow indicated in the screenshot.



   c. Click **Personal E-Mail Address**.

i. If no personal email address exists in the system, click Create.

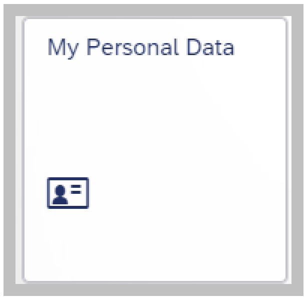


ii. If a personal email address already exists in the system, click Edit. (Note: Delete may also be used if removing a personal email address entirely is desired.)

iii. Employees simply enter their personal email address and click Save.

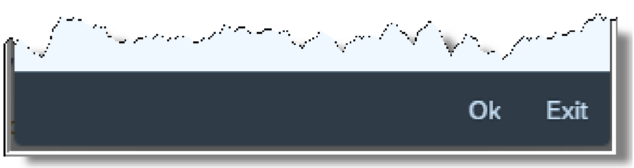
5. **My Personal Data -** displays basic personal and employment information. (Note: As added security, employees must enter their Date of Birth to access this application.)

   a. Click **My Personal Data** to begin.

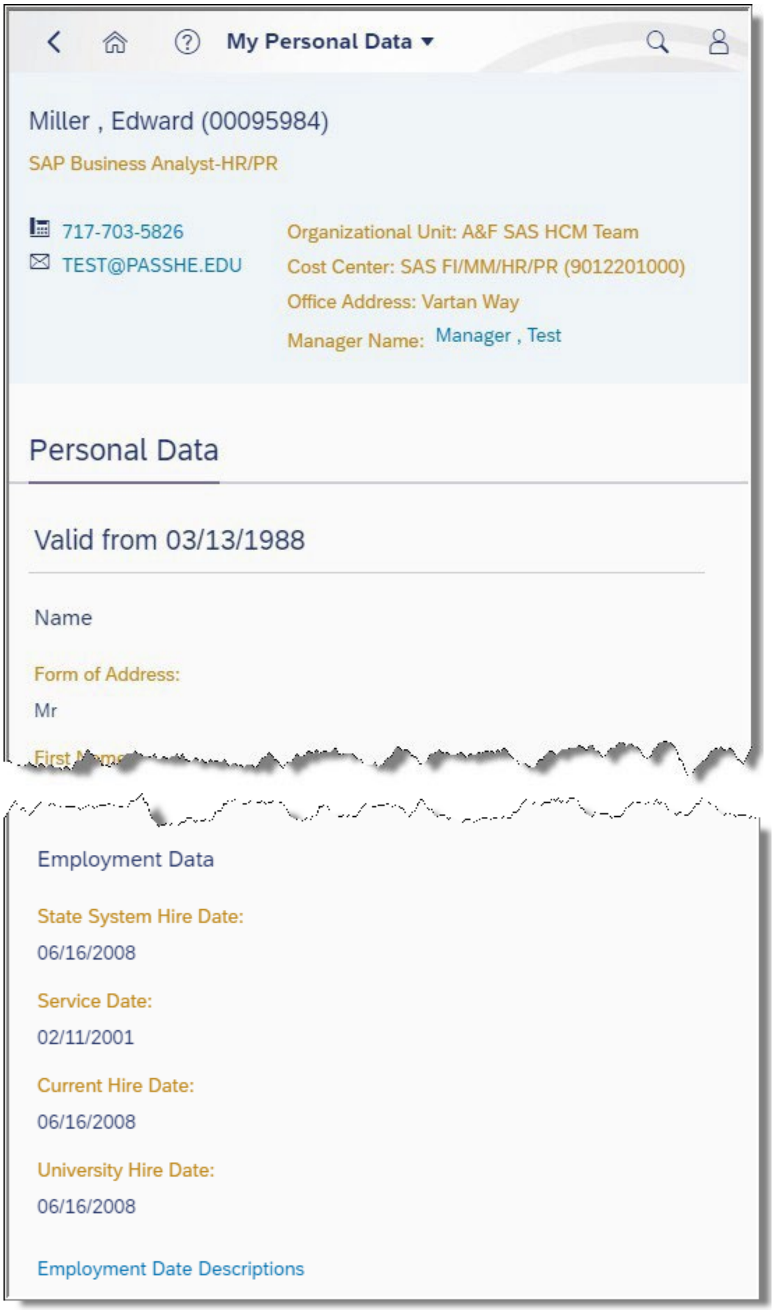


   Due to the sensitivity of personal data, employees must enter their data of birth in mm/dd/ccyy format in order to gain access to this application.

   b. Once the date of birth is entered, click OK.



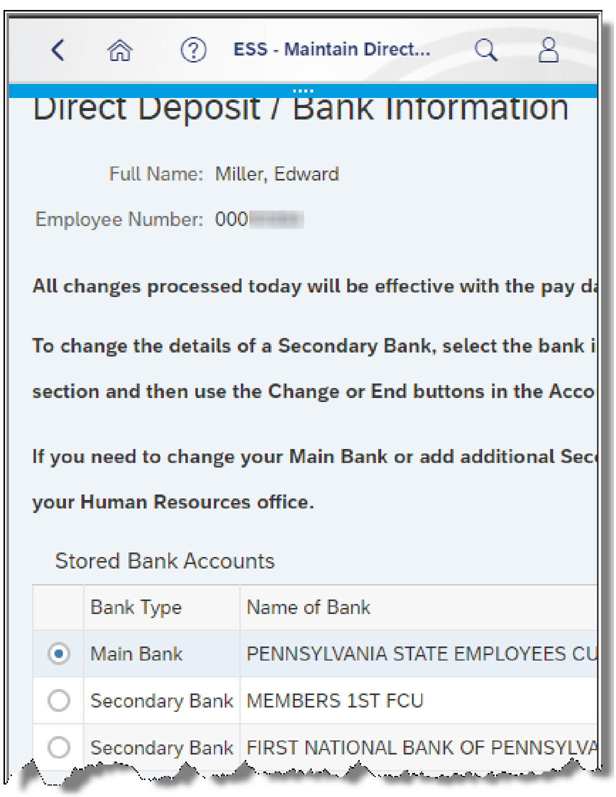
c. If the date of birth is provided successfully, employees will be able to view their personal details as saved in the system along with basic employment information.



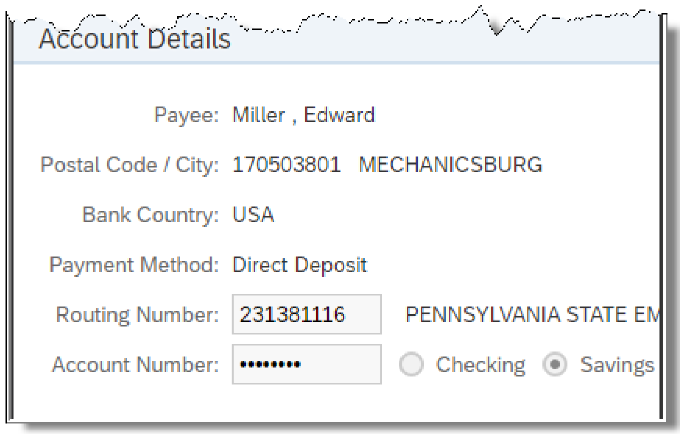
6. **Direct Deposit/Bank Information** – enables employees to view their Main Bank account if not receiving a paper check. Users cannot use this application to modify or set up a Main Bank account and must contact their HR payroll office. If any Secondary Bank(s) exist(s), this application will enable employees to modify deposit amounts or percentages with the option to entirely end the Secondary Bank. (Note: The scrolling features on this application will behave somewhat differently from the other Self Service Workplace applications.)

   a. Click **Direct Deposit/Bank Information** to begin.

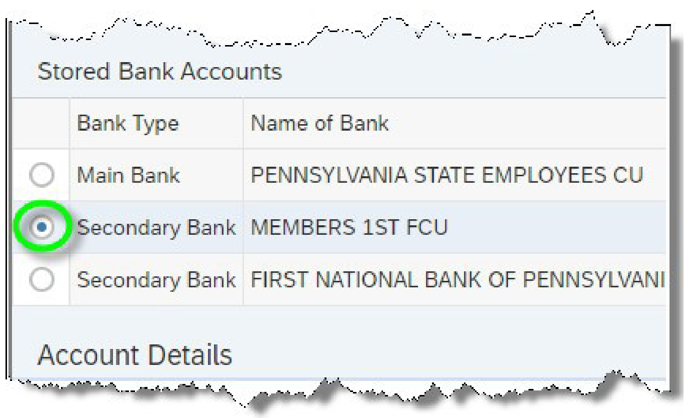
   b. Main Bank account will be displayed by default.



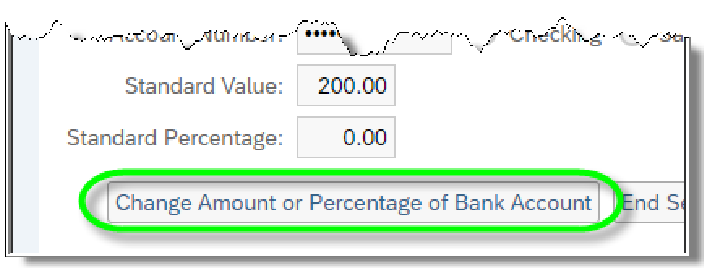
c. The Account Details sections for Main Bank will allow for display only details.



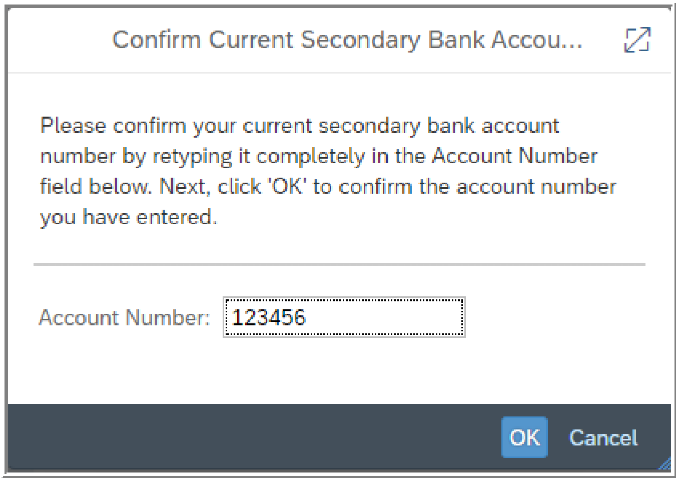
d. To view or modify a Secondary Bank, click in the radio button next to the desired bank where shown.



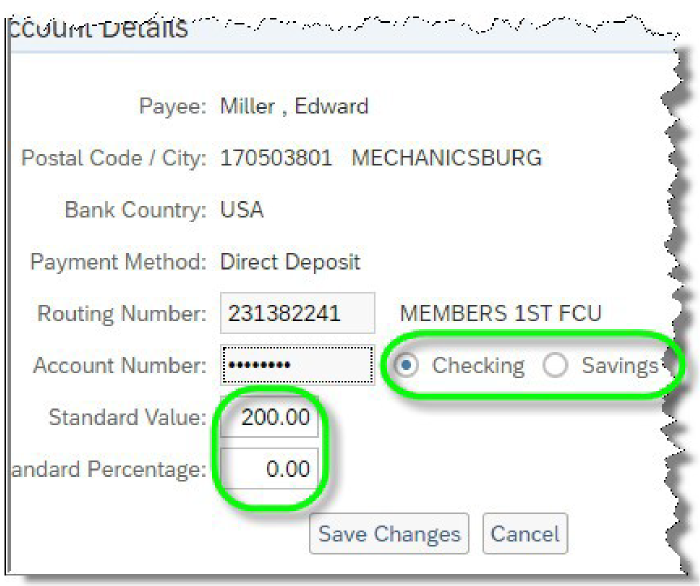
i. To begin making modifications to the Secondary Bank, click Change Amount or Percentage of Bank Account.



ii. For security purposes, the following pop-up will appear for the user to confirm the Secondary Bank account number. Once the account number is entered, click OK.



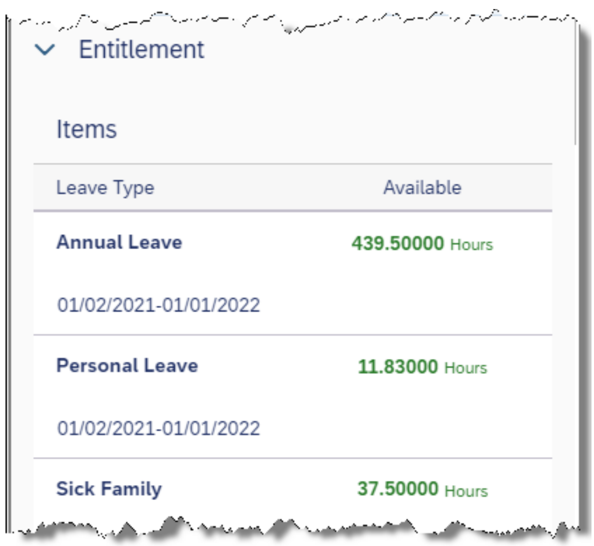
iii. Users can now make modifications to the Standard Value and Standard Percentage fields. The Standard Value field is used to designate a consistent dollar amount to be deposited to the account. The Standard Percentage field is used to designate a consistent percentage of the employee's net pay to be deposited to the account. Only <u>one</u> of these fields may be utilized at a time. When finished, click Save Changes. Users can also change the account type be clicking the radio button for either Checking or Savings.



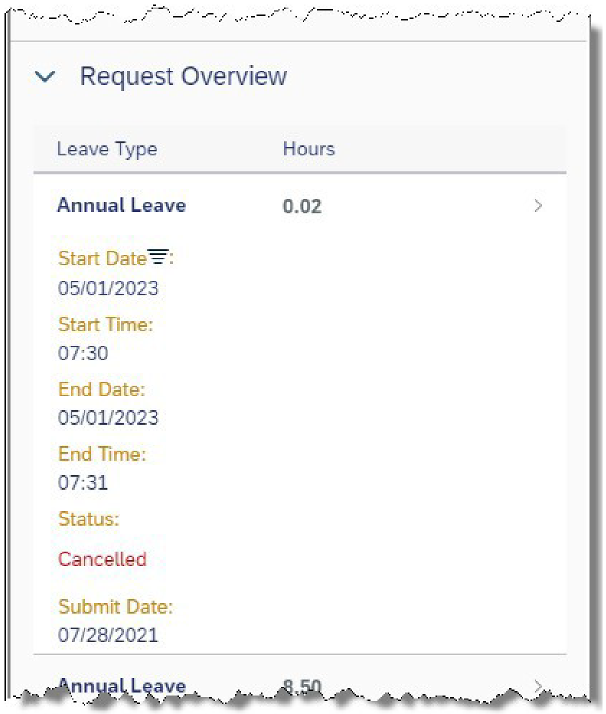
7. **My Leave Request** – enables employees to submit new leave requests and leave cancellations as well as view the status of previous requests.

   a. To begin, click **My Leave Request**.

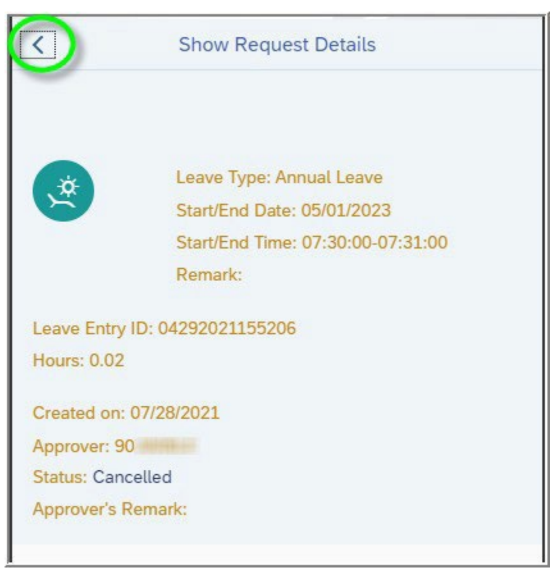
   b. At the top of the page under Entitlement, employee leave balances will display for the different leave types available as well as the start/end dates for the usage period.



c. As user's scroll down the page, the Request Overview section will appear. This section is sorted in ascending order by leave request start date and displays details for employee leave requests already submitted, including Leave Type, Hours requested off, Start Date, Start Time, End Date, End Time, Status of the request, and the Submit Date of the leave request.

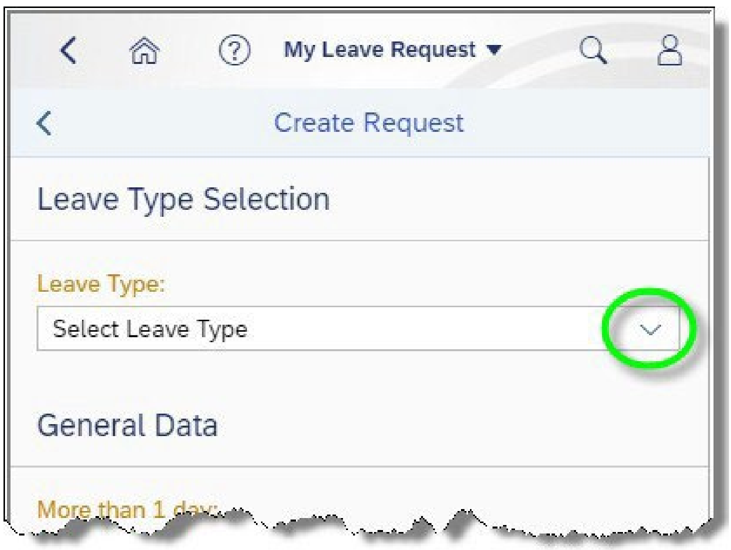


d. To view additional details about a particular leave request, simply click the desired leave request, and the Show Request Details screen will appear. To return to the main page, click the back arrow where shown.



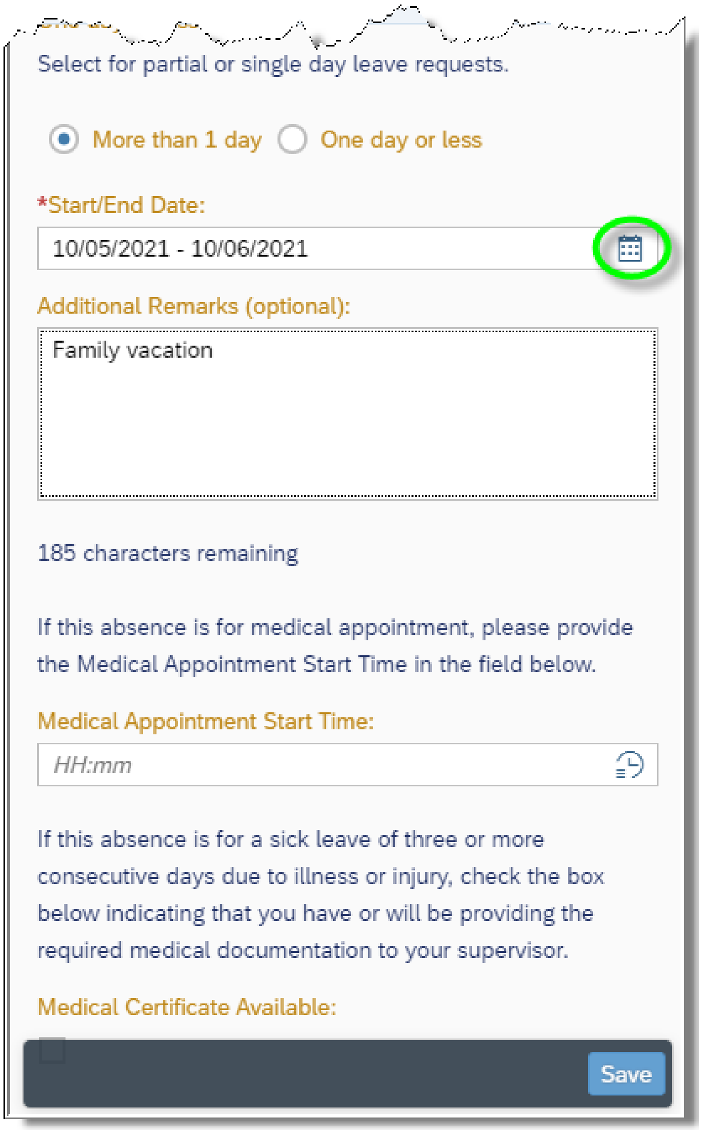
e. To submit a new leave request, click Create Request.

f. On screen instructions will be provided for employees to assist them with submitting leave requests, but users must select a Leave Type from the drop-down box first by clicking the down arrow.

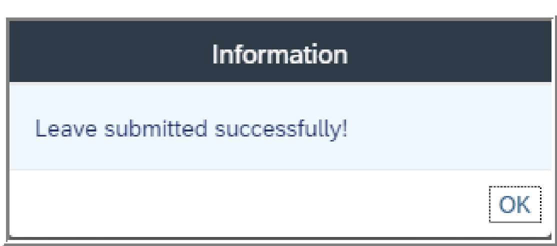


Note: Depending on the Leave Type selected, users may be required to provide more details on the screen, but guidance for these situations will be provided in real-time during the use of the application.

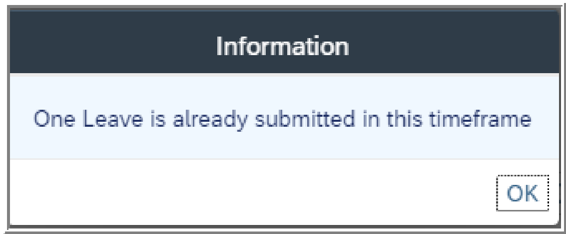
g. After selecting a Leave Type, choose whether the leave request is for more than one day or if it will be for one day or less by clicking the appropriate radio button. Next, enter the Start/End Date by either typing it in or using the calendar feature provided.
Additional Remarks are optional as indicated. When finished



i. The following pop-up will appear indicating the request was submitted successfully to the manager.



ii. If a collision is found between previously submitted leave request, the following pop-up will appear, and the employee will need to resubmit the request using date(s)/time(s) that do not collide with requests already submitted.

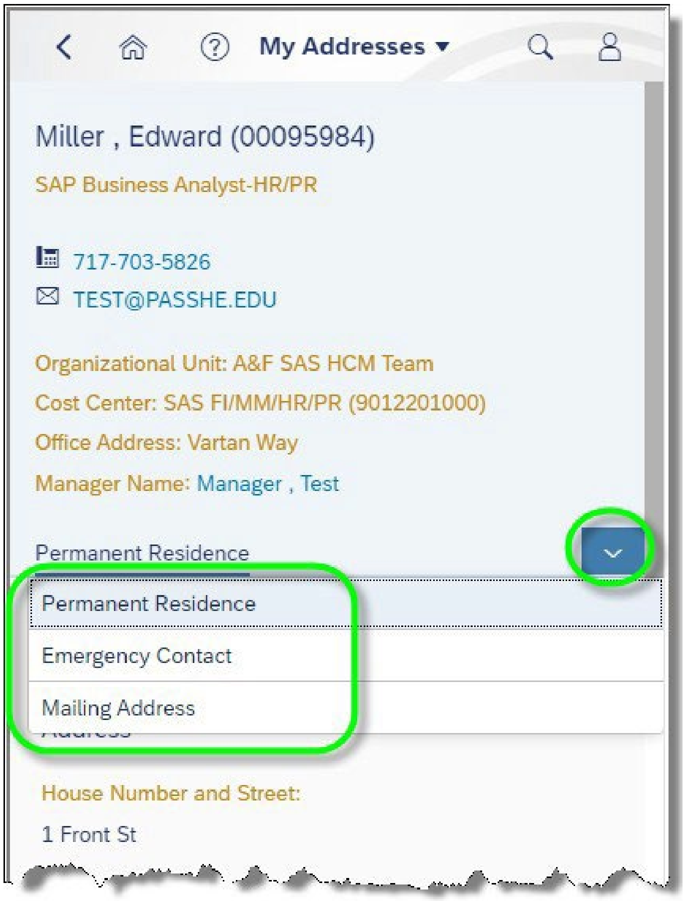


8. **My Addresses** – enables employees to view permanent and mailing addresses as well as view and make updates to emergency contact information.

   a. To begin, click **My Addresses**.

   b. The employee's **Permanent Residence** will be displayed by default. Due to local tax requirements, employees must contact their campus HR office to make any changes to their permanent Address Information.

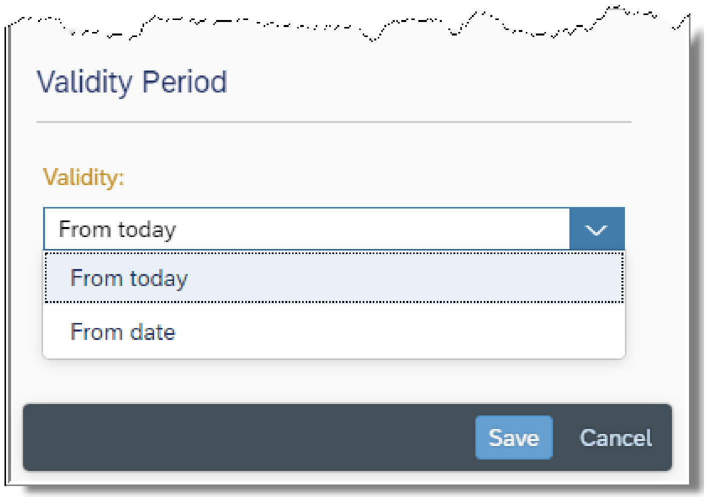
c. Click the drop-down arrow to access additional addresses saved to the system.



d. To view/make changes to emergency contact information, click **Emergency Contact**

e. The emergency contact information will display for review. To make changes, click Edit as shown.

f. The employee's emergency contact data will unlock for modification as needed. At the bottom of the window, employees can elect to have the emergency contact data effective immediately/from today or choose a date to make the changes effective. When finished, click Save.

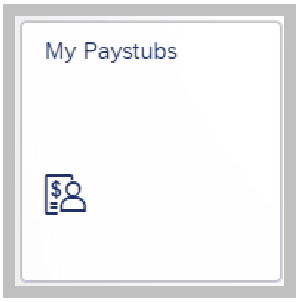


g. The following confirmation will briefly display.

h. Mailing address will only be available in view mode for any employee who currently has an existing mailing address saved to the system. Since a mailing address is only required if the employee desires to received mail at an address that differs from their primary residence, users must visit their campus HR office to make modifications to a mailing address including deleting it from use.

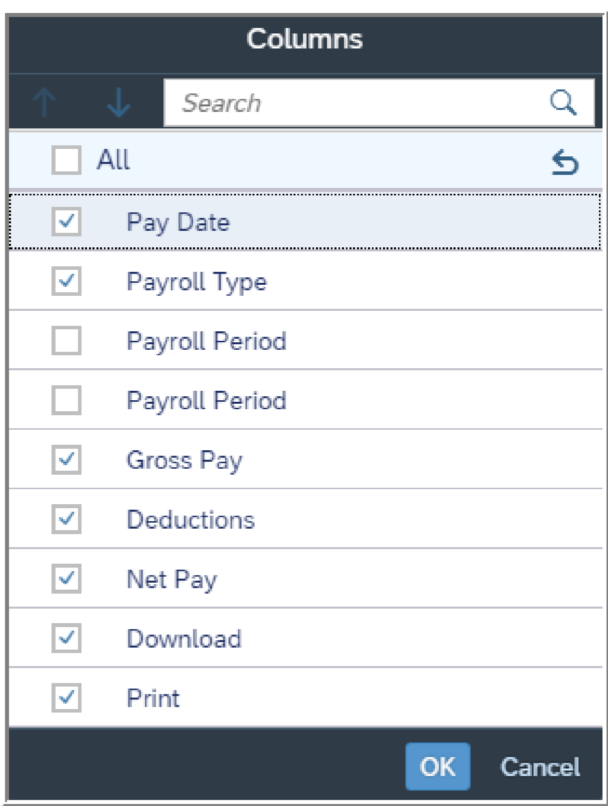
9. **My Paystubs** – enables employees to view and print their paystubs.

   a. Click **My Paystubs** to begin.

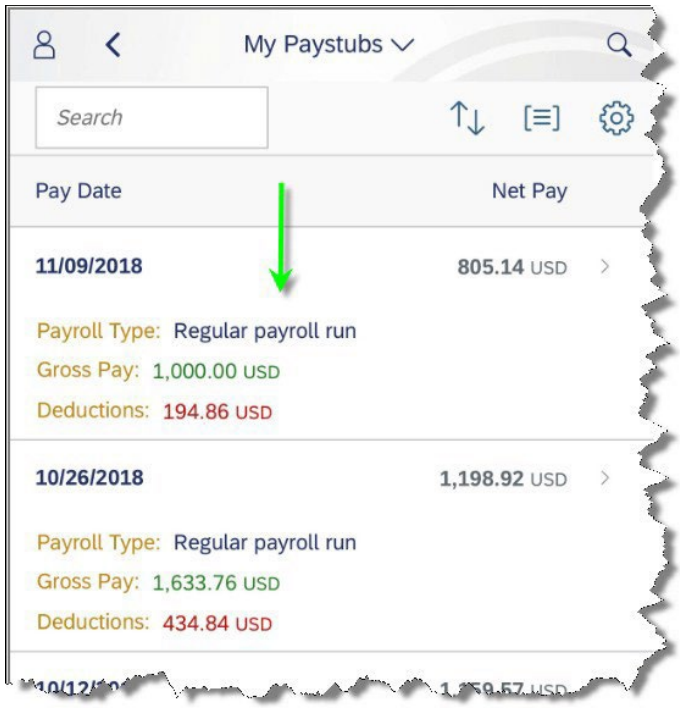


   b. The employee history of paystubs will be displayed. To control the level of paystub details displayed on the overview screen, click the following icon.

   c. Choose the columns to be displayed and click OK.

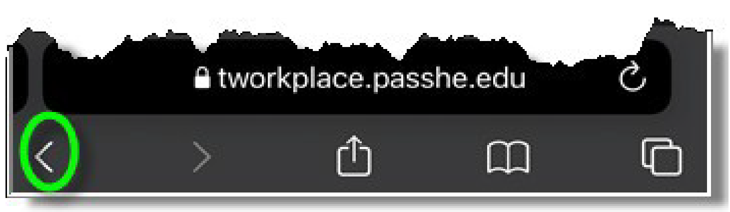


d. To view details of a paystub, click on the desired statement.



Note: If the following window is displayed, click the download icon as shown.

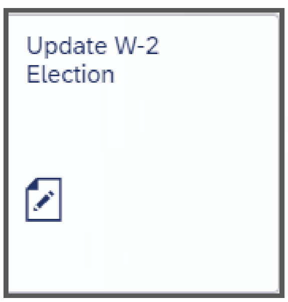
e. The statement details will be displayed. To return to the **Paystubs** screen, click the back button from the browser. (Note: Users may need to use the back button twice.)



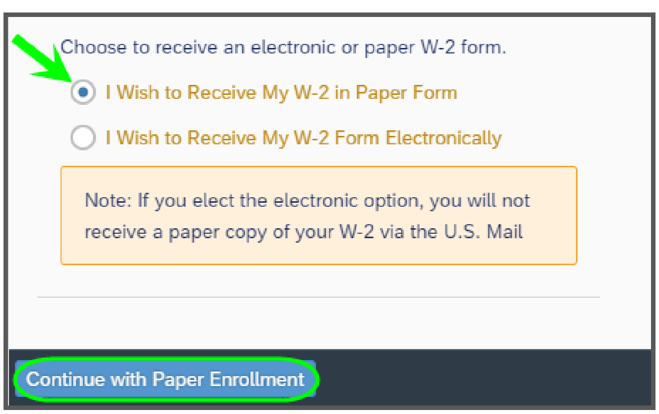
10. **SECA Enrollment** – allows employees access to the annual enrollment screen for SECA Charities, which can only be accessed/updated during the annual enrollment period.

11. **Update W-2 Election** – enables employees to update their W-2. Choose to receive an electronic or paper W-2 form.

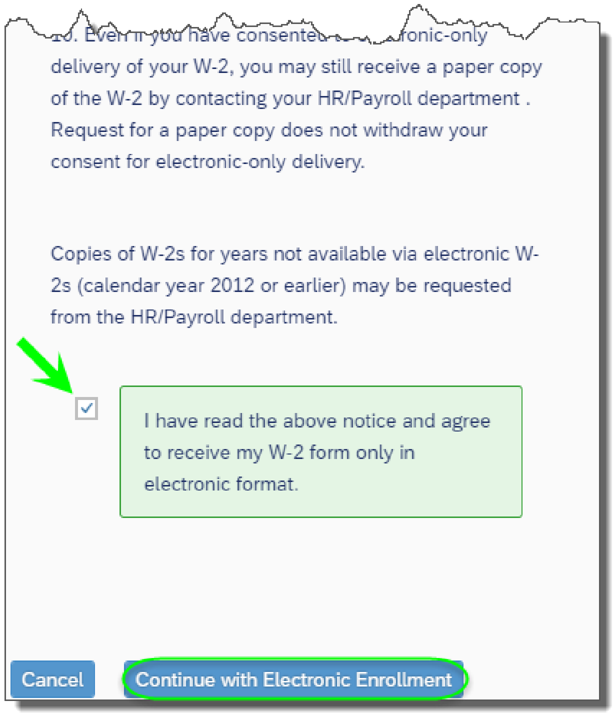
    a. Click Update W-2 Election to begin.



    b. To change to Paper Form, select the appropriate radio button and click 'Continue with Paper Enrollment'.



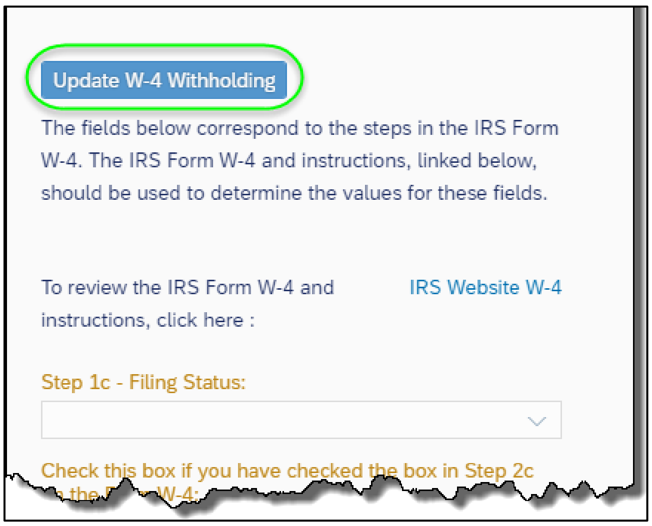
c. To change to Electronic Form, select the appropriate radio button and confirm consent with a check mark in the box at the bottom of the screen. Then click 'Continue with Electronic Enrollment'.



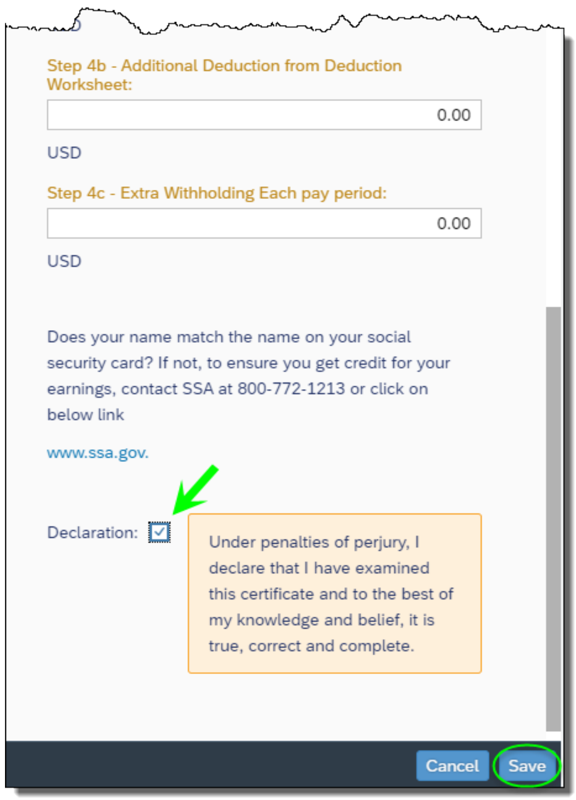
12. W-4 Withholding – enables employees to view and update their W-4 tax information.

a. Click **W-4 Withholding** to begin.

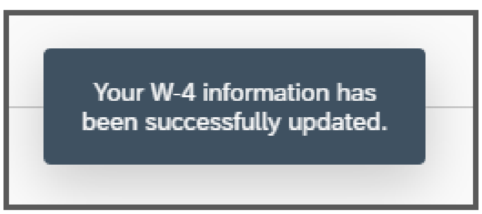
b. Next, click on **Update W-4 Withholding** to make edits to fields.



c. Enter amounts into each field as needed, then click the Declaration checkbox confirming acknowledgment and click save.



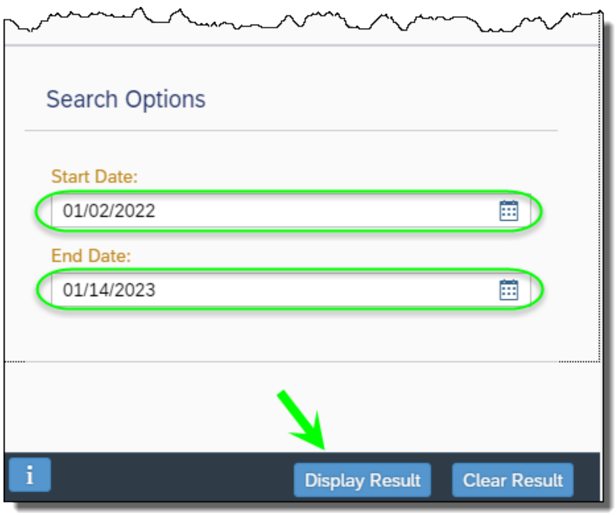
d. You will receive a message confirming your information has been updated



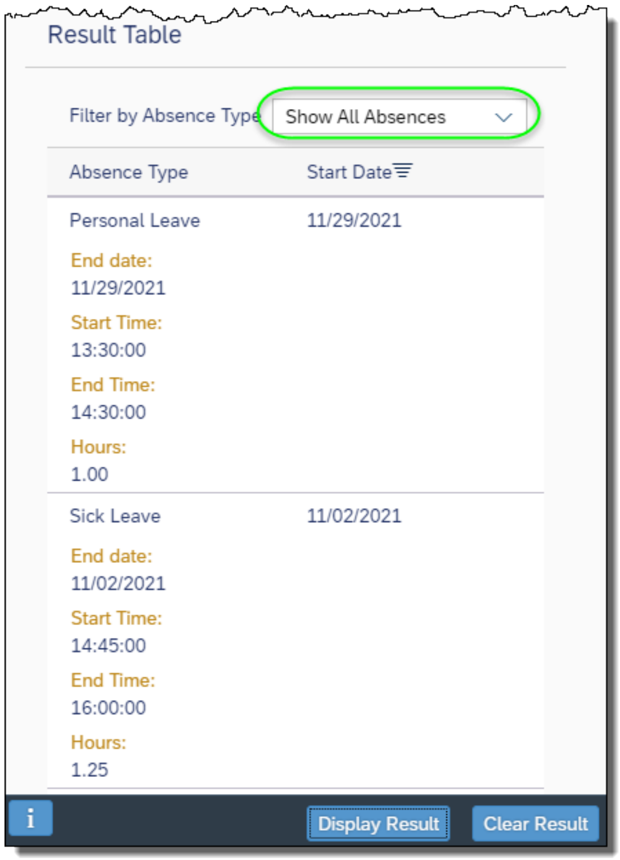
13. Display Absences – display absences approved by your manager.

a. Click **Display Absences** to begin.

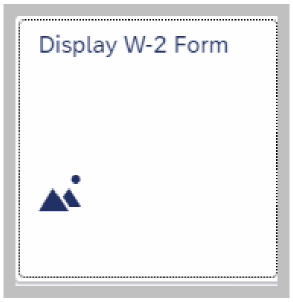
b. Enter date range and click **Display Result**.



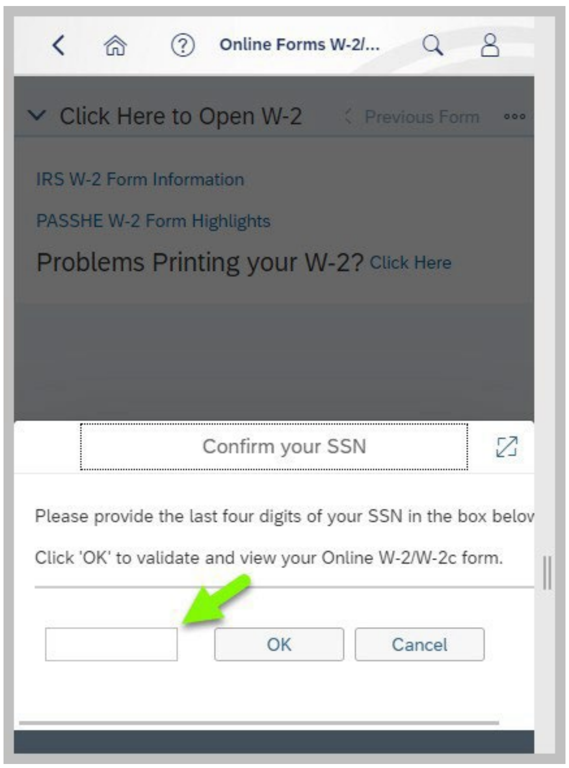
c. Scroll down to view list of Absences or use the Filter by Absence Type drop-down menu to reduce results.



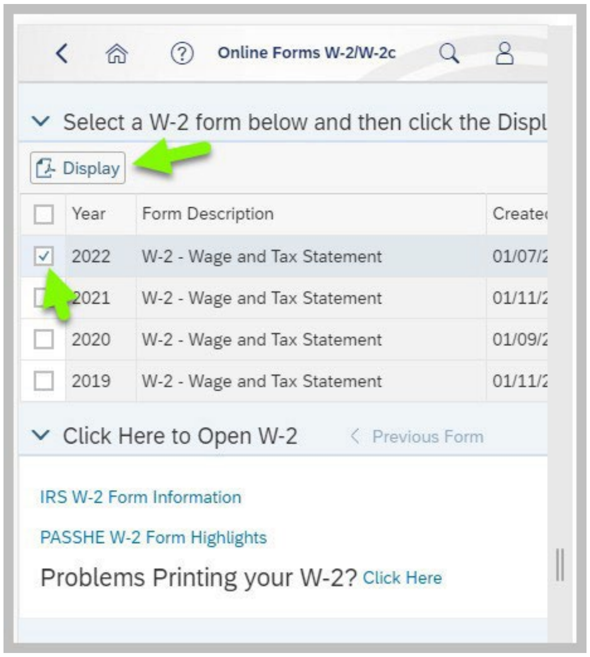
14. Display W-2 Form – display W-2 form if employed in 2021 or prior years and elected to receive your form electronically.



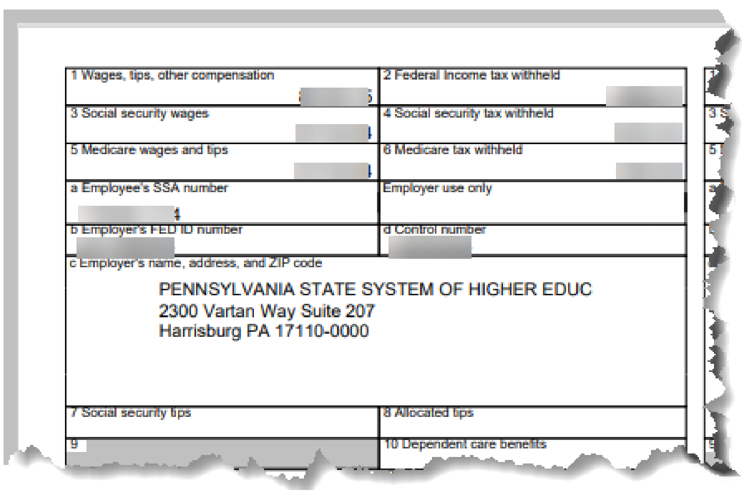
a. Enter the last four digits of your social security number and click OK.



b. Select the year of W-2 to display, download, and/or print by clicking in the associated checkbox and then click Display.

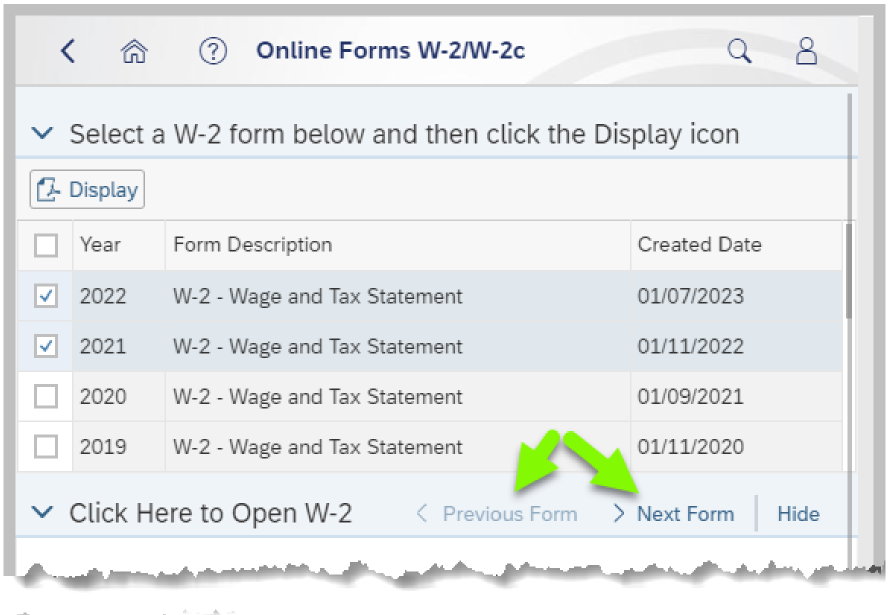


c. Click anywhere in the area shown, and a separate tab will open displaying the W-2 PDF.



Note: To avoid confusion, it is recommended that users choose a single year at a time to display since scrolling through years of W-2 is not currently possible within the application.

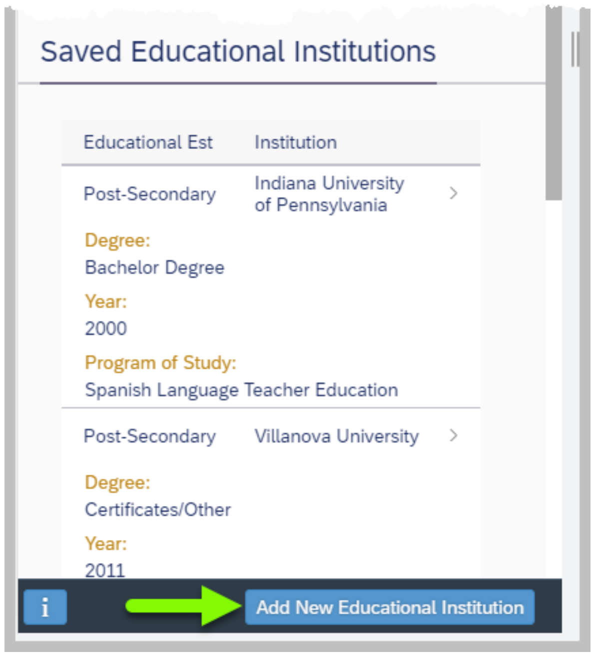
However, If displaying more than one year of W-2's at a time is desired, users will need to use the Previous Form and Next Form options to toggle between years. If there is more than one W- 2 for a given year, use of this feature will also be needed.



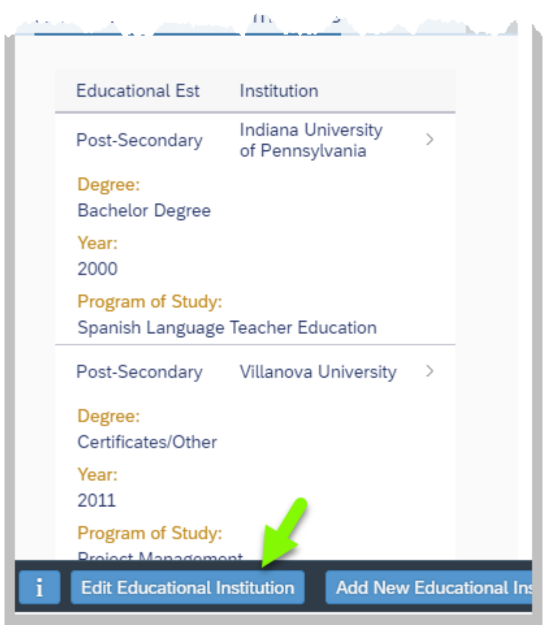
15. Education Information – add, edit, or view employee educational background.

a. To begin, click Education Information.

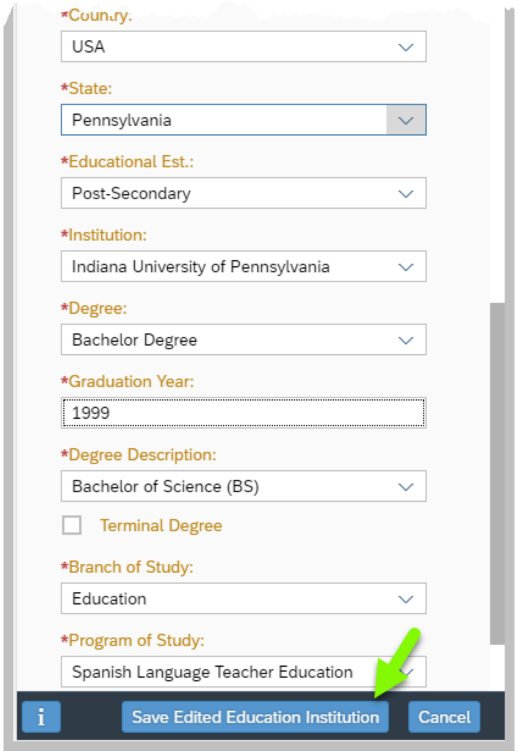
b. To add new education information, click Add New Educational Institution and follow the prompts.



c. To update a previously saved record, click on the associated record then click Edit Educational Institution.



d. Users may need to scroll down to find the fields open for edit. Once updates are finished, click Save Edited Education Institution.

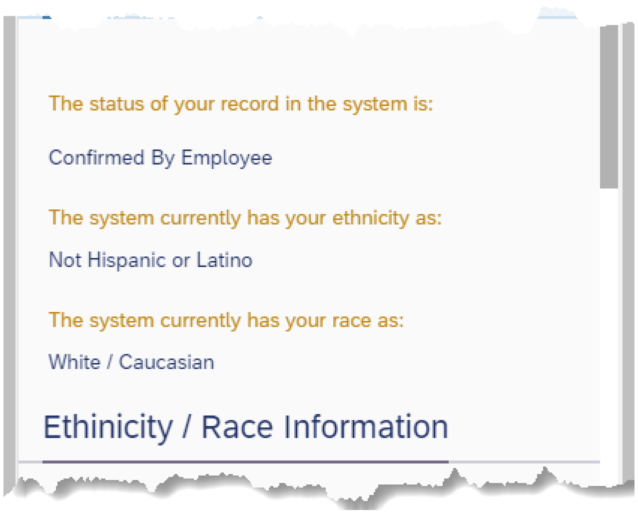


The following confirmation will display.

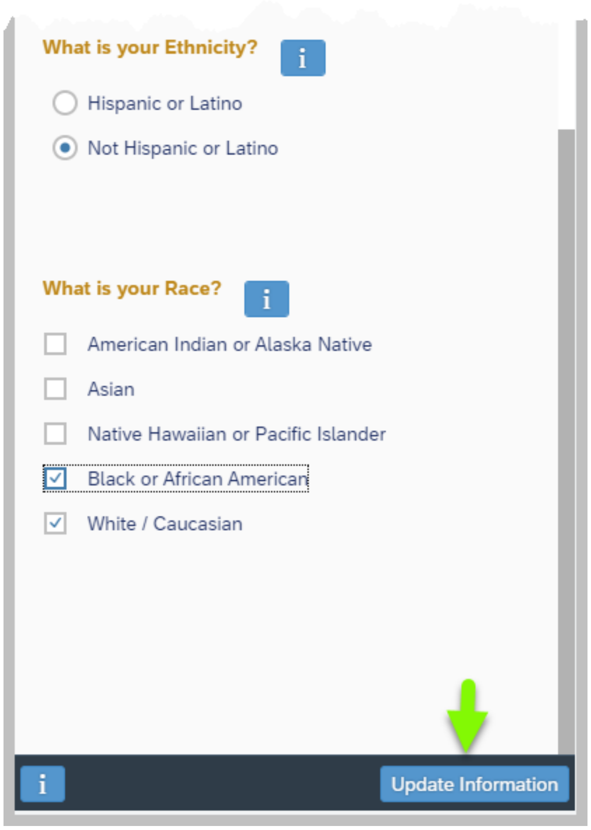
16. Ethnicity/Race – display or update existing ethnicity or race.

a. To begin, click Ethnicity/Race.

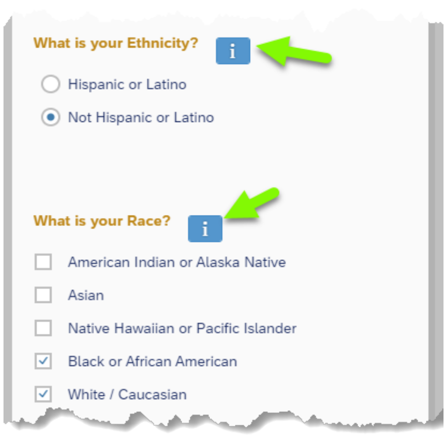
b. Any data previously provided will appear at the top as in this example.



c. To make changes, scroll down to the available fields and make selections as needed. When finished, click Update Information.

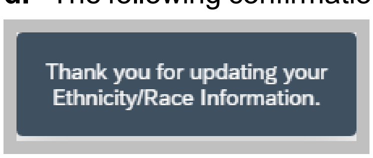


Note: Guidance for updating your ethnicity and race can be found by



clicking on the "i" where indicated.

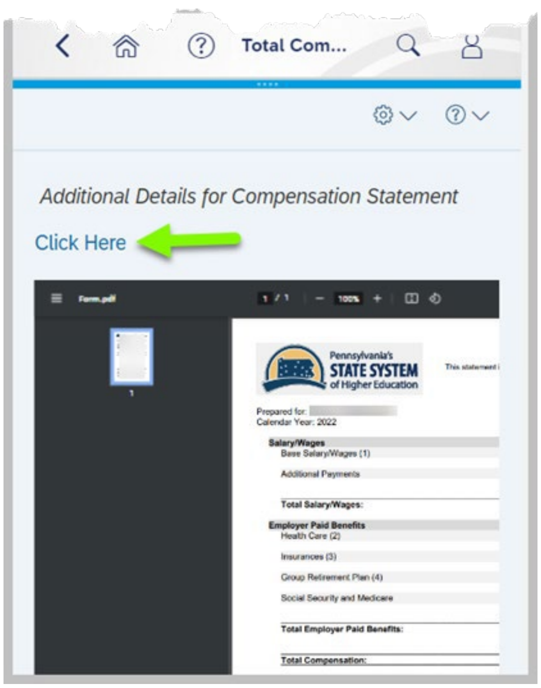
d. The following confirmation message will appear.



17. **Total Compensation Statement** - identifies all the compensation paid via wages to an employee, and, in addition, employer contributions made towards benefits and taxes on an employee's behalf, for a calendar year.

   a. Click Total Compensation Statement to begin.

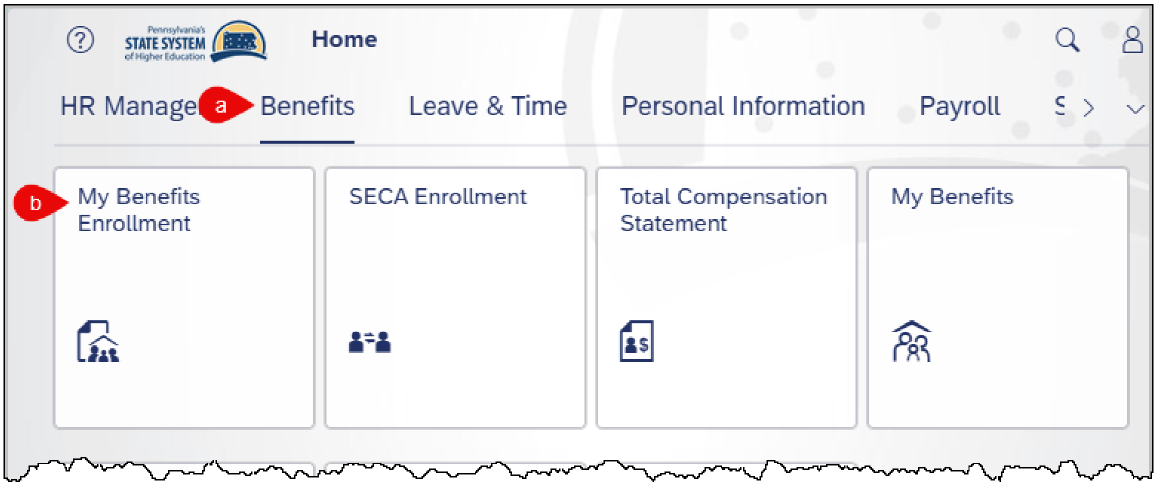
   b. To better understand the Total Compensation Statement, employees are encouraged to follow the link where indicated. This document will address all common questions related to the document.



18. My Benefits Enrollment - enroll in benefits plans such as medical, dental or retirement.

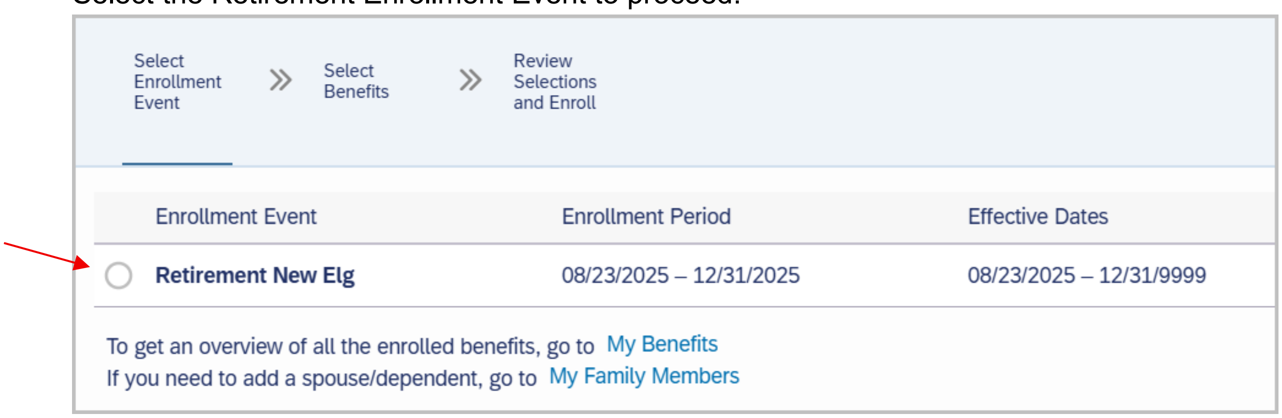
Navigating - Retirement Plan Enrollment

a. To begin the ***Retirement Plan Enrollment*** process, (a) select the **Benefits** tab at the top of the screen, or (b) scroll to navigate to the **My Benefits Enrollment** tile*.*

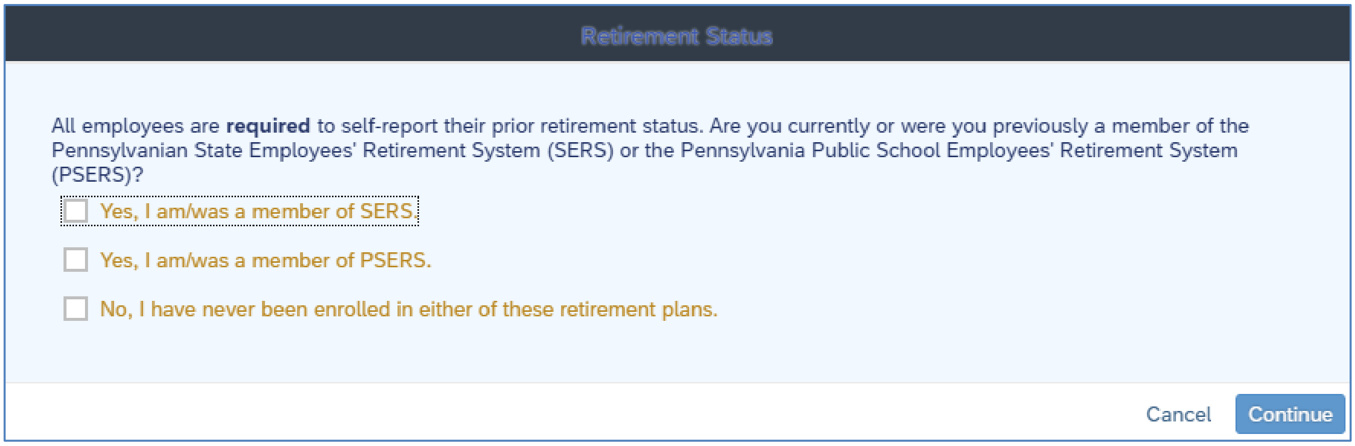


b. The next screen allows employees to review their enrollment events, listing the Enrollment Period and Effective Dates of your coverage. Below the Enrollment Event are links to **My Benefits** and **My Family Members**.

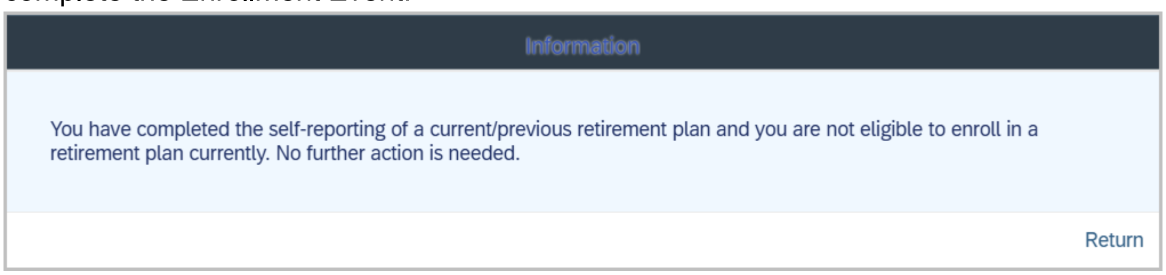
Select the Retirement Enrollment Event to proceed.



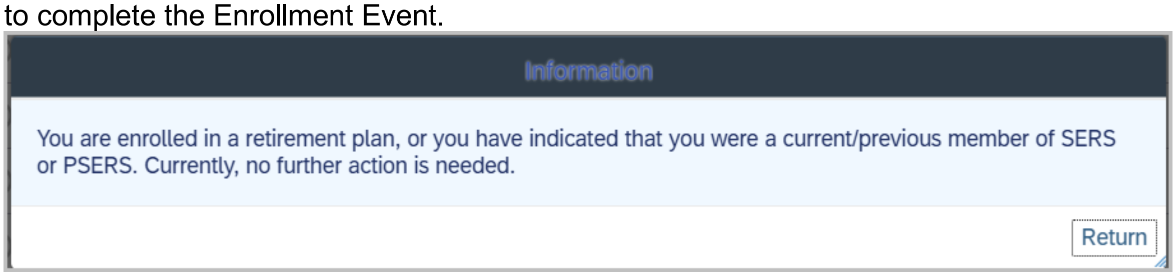
c. The **Retirement Status** window will open for all employees to self-report current or previous retirement enrollment status. Select one of the three options then click the **Continue** button in the lower right corner of the screen.



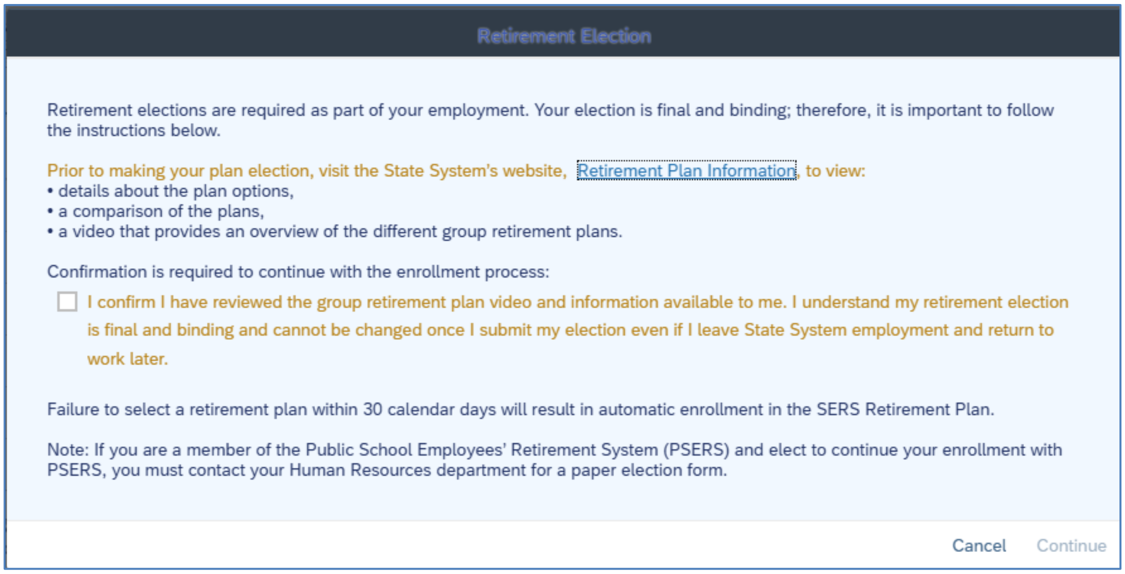
- Employees who are NOT eligible to enroll in a retirement plan will be prompted with the screen shown below. Click the **Return** button in the lower right corner to complete the Enrollment Event.



- Employees who select either the first or second options indicating current/previous member of SERS/PSERS and who are eligible to enroll in a retirement plan will be prompted with the screen shown below. Click the **Return** button in the lower right corner to complete the Enrollment Event.

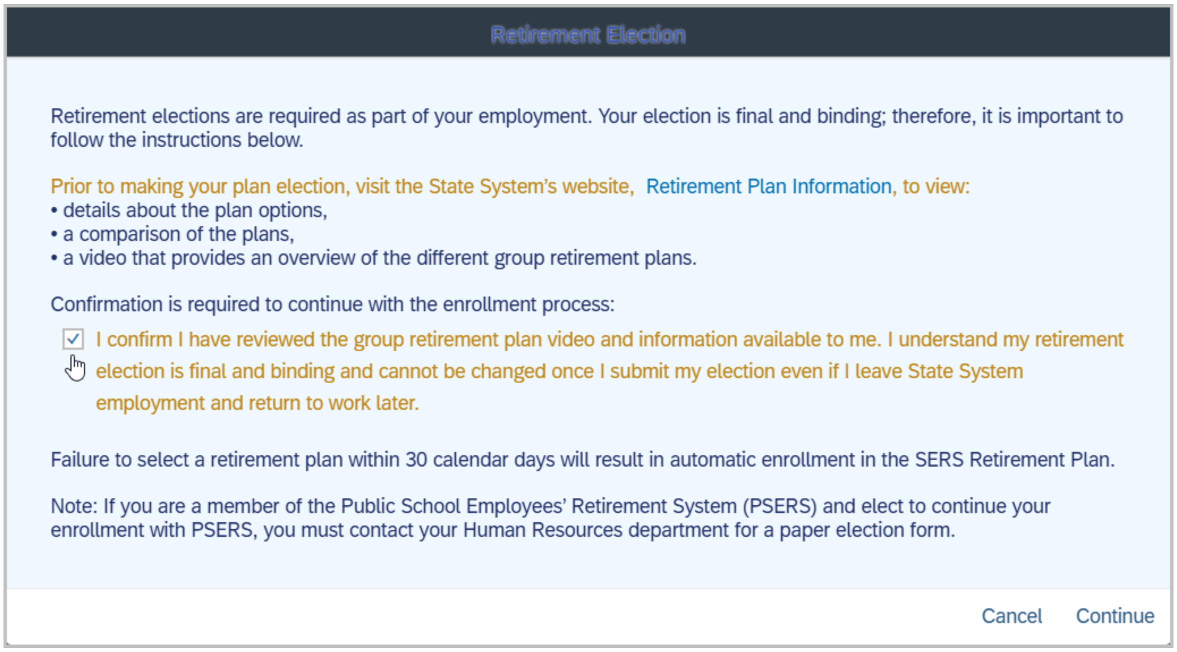


- Employees who select the third option indicating no current/previous membership with SERS/PSERS and who are eligible to enroll in a retirement program will be prompted with the **Retirement Election** window.

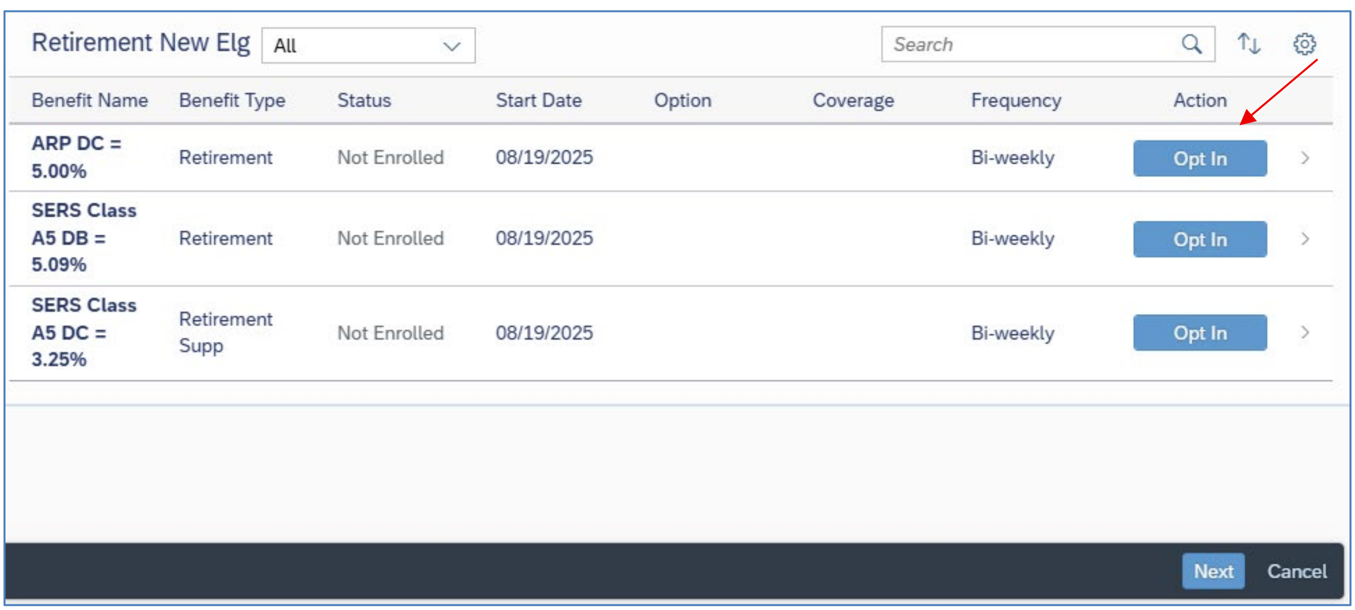


- Click the **Retirement Plan Information** link, to open a new tab or window with detailed retirement plan information. *It is important to review the retirement plan information before making an election.*

- Return to the **Retirement Election** window and select the checkbox to confirm that the retirement plan information has been reviewed and you are ready to make a retirement plan election. Click the **Continue** button in the lower right corner.
- Failure to select a retirement plan within 30 calendar days will result in automatic enrollment in the SERS *(which may not reflect the plan that best meets your individual retirement goals)*.

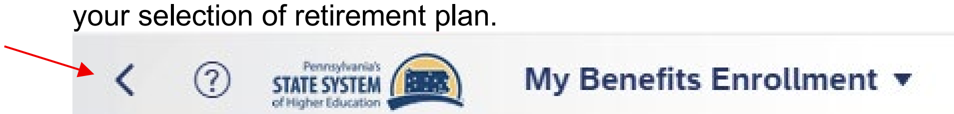


d. The following screen will display the available retirement plan options. Choose a plan by selecting the **Opt In** button to the right of the plan benefit name.



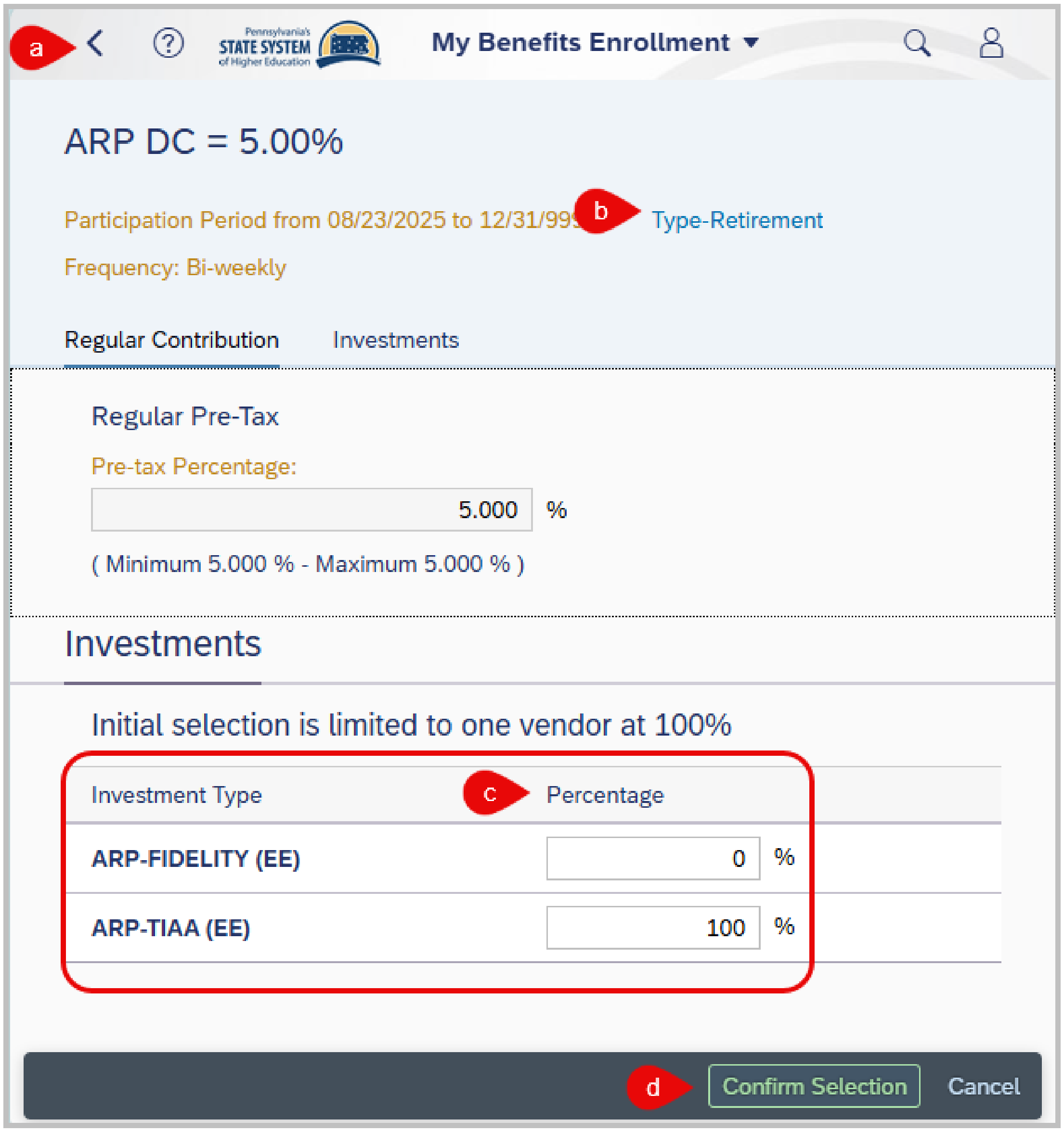
Benefit Name	Benefit Type	Status	Start Date	Option	Coverage	Frequency	Action
ARP DC = 5.00%	Retirement	Not Enrolled	08/19/2025			Bi-weekly	Opt In
SERS Class A5 DB = 5.09%	Retirement	Not Enrolled	08/19/2025			Bi-weekly	Opt In
SERS Class A5 DC = 3.25%	Retirement Supp	Not Enrolled	08/19/2025			Bi-weekly	Opt In

- You may use the Back arrow in the top left corner to return to the previous screen to change your selection of retirement plan.



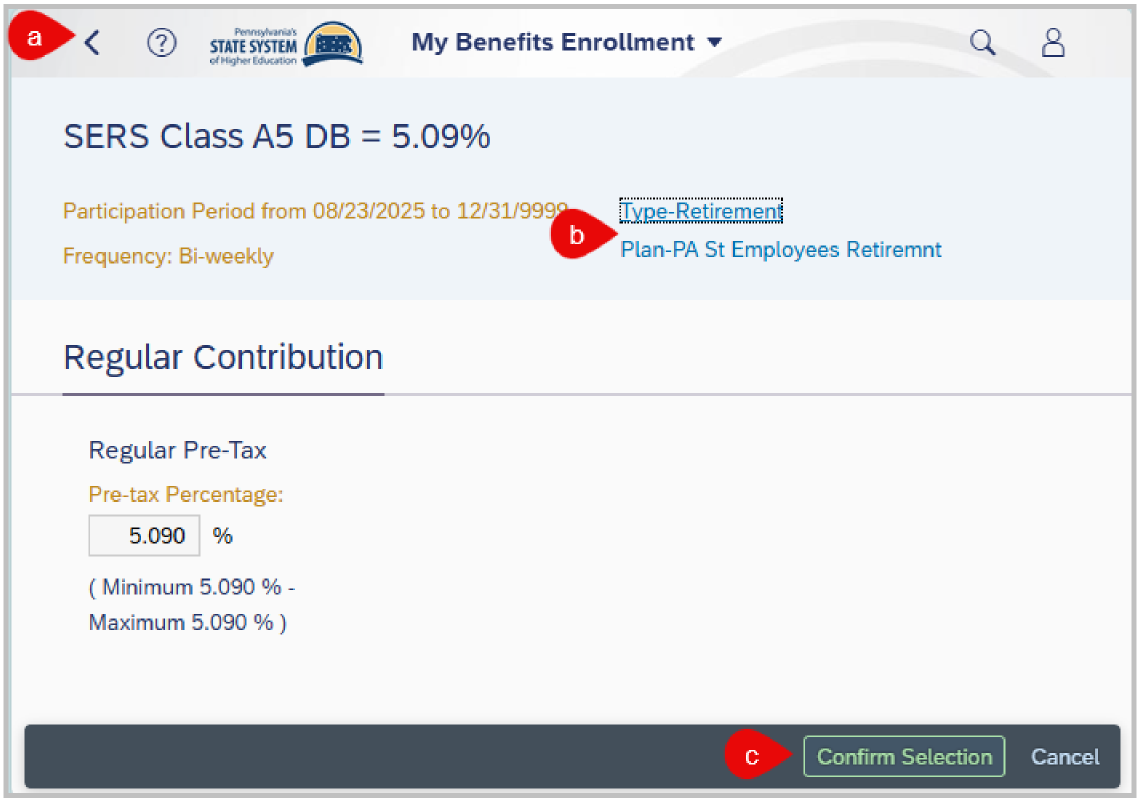
e. Electing ARP enrollment:

a. Use the back arrow to return to the previous window.
b. Click link to review retirement plan information.
c. Select the vendor of your choice by entering 100% in the appropriate box.
d. Click the **Confirm Selection** box to return to the previous window and finalize your enrollment; or click the **Cancel** box to return to the previous window to make a different selection.

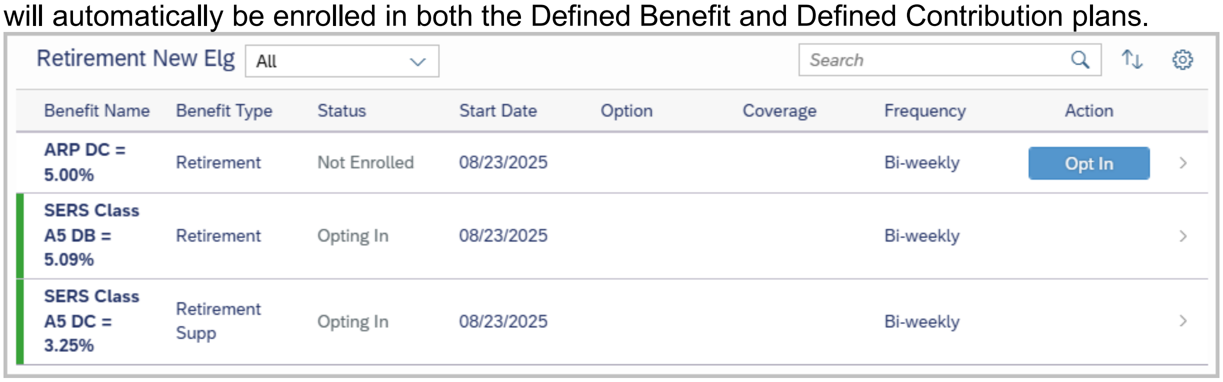


f. Electing SERS Enrollment.

a. Use the back arrow to return to the previous window.
b. Click links to review retirement plan information.
c. Click the **Confirm Selection** box to return to the previous window and finalize your enrollment; or click the **Cancel** box to return to the previous window to make a different selection.

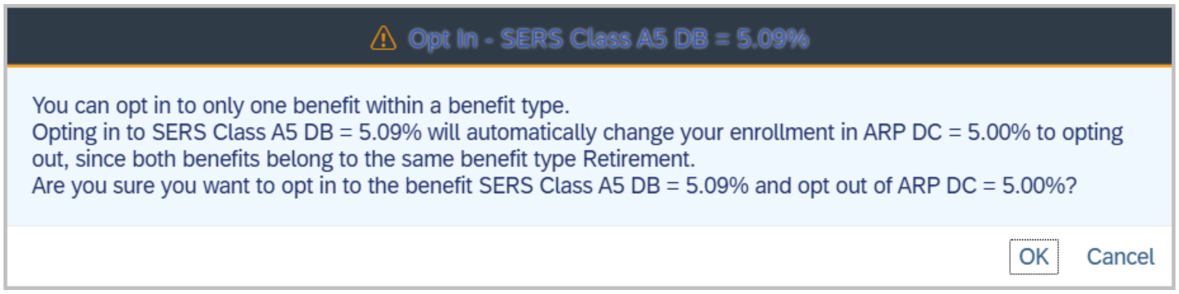


NOTE: When electing SERS, if required (depending on the SERS Class of Service) you will automatically be enrolled in both the Defined Benefit and Defined Contribution plans.

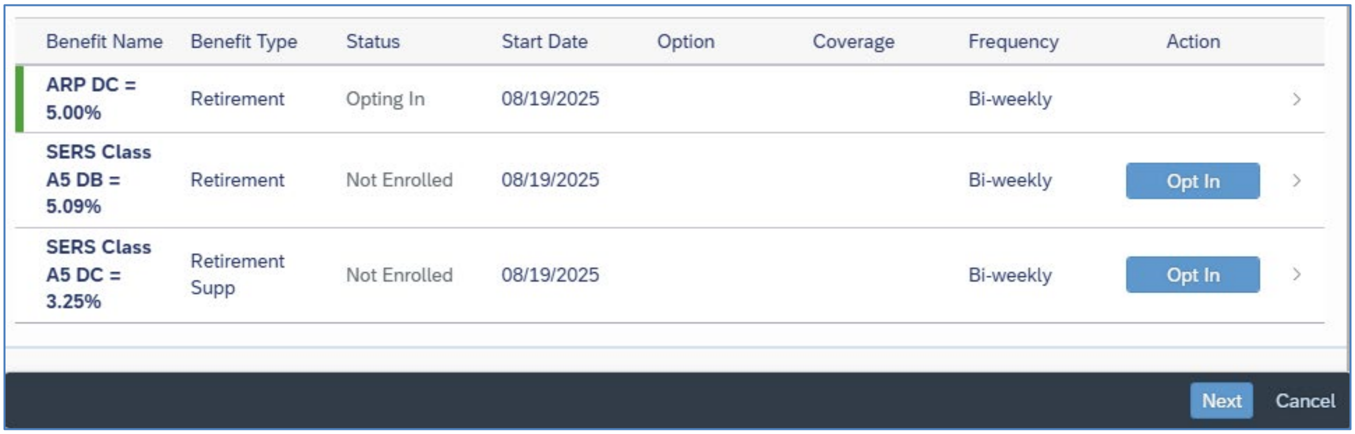


Benefit Name	Benefit Type	Status	Start Date	Option	Coverage	Frequency	Action
ARP DC = 5.00%	Retirement	Not Enrolled	08/23/2025			Bi-weekly	Opt In
SERS Class A5 DB = 5.09%	Retirement	Opting In	08/23/2025			Bi-weekly	
SERS Class A5 DC = 3.25%	Retirement Supp	Opting In	08/23/2025			Bi-weekly	

g. At the main election screen you can change plans by selecting the **Opt In** button. A notice will appear asking if you are sure you want to change the plan; select **OK** or **Cancel**.



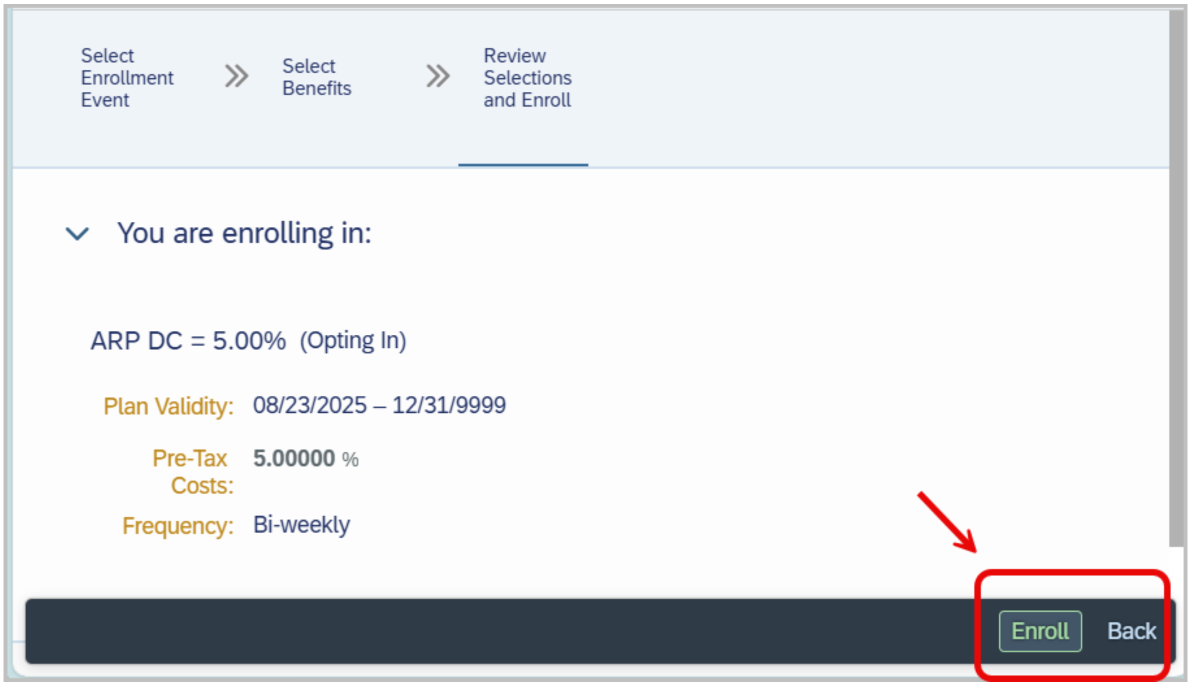
h. When you are sure of your election, click the **Next** button in the lower right corner.



Benefit Name	Benefit Type	Status	Start Date	Option	Coverage	Frequency	Action
ARP DC = 5.00%	Retirement	Opting In	08/19/2025			Bi-weekly	
SERS Class A5 DB = 5.09%	Retirement	Not Enrolled	08/19/2025			Bi-weekly	Opt In
SERS Class A5 DC = 3.25%	Retirement Supp	Not Enrolled	08/19/2025			Bi-weekly	Opt In

Next Cancel

i. To finalize your enrollment, click the **Enroll** button. NOTE: once the **Enroll** button is selected, your election is ***permanent*** and cannot be changed. If this is not the plan you want to elect, click the **Back** button in the lower right corner to return to the main election screen.



j. The following message will appear confirming your election has been saved. Also, a confirmation email will be sent to your work email address. It is important to keep the confirmation email as proof of your retirement plan election. Click the **Exit** button.