Employee Self-Service User Guide
API Healthcare Human Resources and Payroll Solution
Version 09.02.06.00 and Greater

November 2012
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Chapter 1
Introduction

Topics in this chapter

Conventions ................................................................. 2
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The API Healthcare Human Resources and Payroll Employee Self-Service (ESS) gives employees the ability to take charge of their personal information and be proactive regarding their benefits, all through your organization’s Intranet. Using the ESS an employee can:

- Update demographic information, including phone numbers, addresses, dependents, and emergency contacts.
- View current benefits, and enroll in benefits during the open enrollment period.
- Monitor vacation balances.
- View past pay checks and W-2 information.
- Edit W-4 information.

This guide will introduce you to the ESS and explain how to view and edit this information.

Note
Which fields you are authorized to edit and see is configured in Human Resources and Payroll. For more information about ESS configuration, see the Employee Self-Service Configuration Guide.
## Conventions

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Boldface type</strong></td>
<td>Indicates items in the program that you click or check/uncheck.</td>
</tr>
<tr>
<td>Example</td>
<td>Click <strong>Save</strong>.</td>
</tr>
<tr>
<td><strong>Initial Capital Letter</strong></td>
<td>The first letters of the names of windows, dialog boxes, window elements, and commands are capitalized.</td>
</tr>
<tr>
<td>Example</td>
<td>In the Employee Information area…</td>
</tr>
<tr>
<td></td>
<td>In the First Name field…</td>
</tr>
<tr>
<td><strong>Italics type</strong></td>
<td>Indicates field value options. This style helps draw attention to items that you are not clicking or selecting.</td>
</tr>
<tr>
<td>Example</td>
<td>The Frequency field is set to <strong>All Pay Periods</strong>.</td>
</tr>
<tr>
<td><strong>Navigation (&gt;)</strong></td>
<td>This style indicates movement between screens.</td>
</tr>
<tr>
<td>Example</td>
<td><em>Employee &gt; Personal Information</em> means to first select the <strong>Employee</strong> menu, and then click <strong>Personal Information</strong>.</td>
</tr>
<tr>
<td><strong>Numeric values</strong></td>
<td>Single quotes help to highlight numeric values you are directed to select for field options.</td>
</tr>
<tr>
<td>Example</td>
<td>The Priority field is set to '1.'</td>
</tr>
</tbody>
</table>
About Employee Self-Service

When you log on to ESS, the Home screen appears. From this screen you can access other summary screens using the menu bar and menu options.

From the summary screens you can select records and then click buttons in the button bar to open detail screens about the selected record for viewing, editing, or printing.
Access Employee Self-Service

ESS is an online portal through which you can manage your personal information and review your benefits and pay check information.

To access ESS, complete the following steps.

1. Open your Internet browser and go to the address provided by your organization.
2. If pass-through security is enabled, the Home screen automatically loads.
   If pass-through security is not enabled, enter your network account and password in the logon screen.

   ![Login Screen](image)

Note
This screen can take on different appearances depending on how your organization has configured network domains. For more information, consult your IT department.

The ESS home page loads and displays a welcome message.

![Welcome Message](image)

Good morning Eleanor, today is Monday, October 29, 2012

When finished, make sure to Sign Out prior to closing the browser window.
Employee Self-Service Basics

Depending on how your organization has set up ESS, you may have rights to add and edit information, or only to view information.

The following menus and screens are accessible to employees in ESS. The screens are very similar to the Human Resources and Payroll screens and contain the same employee information that resides in the Human Resources and Payroll database.

They are organized with tabs located at the top of the screen.

<table>
<thead>
<tr>
<th>Menu</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>Contains a welcome message including the current date and a reminder to be sure to sign out before closing the browser window. In addition, any employee changes that require approval generate messages that are displayed here along with the status of the approvals and denyals.</td>
</tr>
<tr>
<td>Employee</td>
<td>Gives you access to edit or view your personal information and to view, edit, or delete your personal contacts. Contains the following screens:</td>
</tr>
<tr>
<td></td>
<td>• Personal Information - Where your personal information, addresses, phone numbers, and e-mail addresses reside.</td>
</tr>
<tr>
<td></td>
<td>• Personal Contacts - Where information about your emergency contacts, spouse, dependents, and beneficiaries resides.</td>
</tr>
<tr>
<td>Benefits</td>
<td>Gives you access to view your current benefits, to enroll in benefit plans for which you are eligible during open enrollment, and to view your benefit plan balances and history. Contains the following screens:</td>
</tr>
<tr>
<td></td>
<td>• Benefit Balances - Where your benefit leave information is available, including available balances, amounts accrued, amounts taken, and entitlement values.</td>
</tr>
<tr>
<td></td>
<td>• Benefit Plans - Where your current benefit plans are viewable and you can elect future enrollments during open enrollment.</td>
</tr>
<tr>
<td>Menu</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Payroll</td>
<td>Gives you access to view, add, edit, or delete your direct deposit information; view or print pay check statements; view pay check deduction and earnings history; edit tax filing status and withholding allowances; and print W-2 statements.</td>
</tr>
<tr>
<td></td>
<td>Contains the following screens:</td>
</tr>
<tr>
<td></td>
<td>• Direct Deposit - Where your direct deposit accounts reside.</td>
</tr>
<tr>
<td></td>
<td>• Pay Checks - Where your pay history information resides.</td>
</tr>
<tr>
<td></td>
<td>By selecting a pay check and clicking <strong>View Statement</strong> or <strong>Print Statement</strong>, the details of the check are provided in a printable form. If you have elected direct deposit as the form of payment instead of a pay check, this is your paperless check.</td>
</tr>
<tr>
<td></td>
<td>• Deductions - Where your deduction history resides, including employer amounts and arrears activity.</td>
</tr>
<tr>
<td></td>
<td>• Earnings - Where your history of earning types resides, including check dates, base rates, and hours worked.</td>
</tr>
<tr>
<td></td>
<td>• Taxes - Where your tax information resides. The type of tax determines the fields that appear.</td>
</tr>
<tr>
<td></td>
<td>• W-2 Forms - Where you can view your W-2 information and print a W-2 report for a specific year and employer.</td>
</tr>
</tbody>
</table>
Grid Layout
As you access information in ESS, many screens display summary information in a grid format. You can rearrange the information.

Resize Columns
To change the width of a column, complete the following steps.

1. Position the cursor in the top row of the grid over the divider between two columns.
2. Click and drag the cursor to the left or right to resize the columns.

Change Column Order
To view a column in a different position in the grid, complete the following steps.

1. Click the header of the column you want to move.
2. Drag it to the left or right to the new location you want.
A temporary dark line appears as you drag the column to indicate where it will be placed.

**Using Scroll Bars**

Depending on your screen resolution, you may need to use the vertical or horizontal scroll bars to see information that does not fit in your window. Drag the scroll bars or click the arrows on the scroll bars to bring additional information into view.

**Tip**

Press **PAGE UP** or **PAGE DOWN** or use the arrow keys on your keyboard as an alternate method for bringing additional information into view.

If your resolution is set high enough, the entire screen will fit in your window and you will not see scroll bars.
Effective Dating

As you work in ESS, watch for yellow banners at the top of the screen. When these banners appear, they inform you that the record you are viewing has changes effective in the future.

**Example**
Changes have been made to this information that will take effect at a future date. Use the arrows to navigate between effective dated changes.

Click the navigation arrows at the end of the message to view future or past records. The following example shows the text that appears when you are looking at a list of future records.

**Example**
One or more records displayed below have changes that will not take place until 06/10/2012. Use the arrows to navigate between effective dated changes.

Any additional changes must be made to the most future record and must be effective as of or after the effective date in that record. An error message appears if the effective date entered is not valid.
Chapter 2
Employee Information

Topics in this chapter
- Personal Information .......................................................... 11
- Personal Contacts .................................................................. 14

ESS gives you access to view or edit your personal information and to view, edit, or delete your personal contacts depending on your permissions.

In this chapter you will learn how to work with the Personal Information and Personal Contacts options that are in the Employee menu.
Personal Information

Personal information includes basic demographic information such as your name, birth date, mailing address, phone information, and e-mail address. The system calculates your age based on your birth date and the current system date (the current date minus the birth date equals your years of age).

Selection lists exist for address, phone, and Web address areas to record multiple options for contact information.

View Personal Information

To open the Personal Information detail screen, complete the following steps.

1. Navigate to Employee > Personal Information.
   
   The Personal Information detail screen opens.

2. Review information in the record.

   **Tip**

   To access additional address, phone, or e-mail records, click the arrow in the field showing the Primary option and select a different option from the list.

3. If you change any information, in the upper right click **Save**.

4. To exit without saving, select another screen from the menu or click **Sign Out**.
Add or Change Personal Information

Your personal information, as it appears in Human Resources and Payroll, also appears in the ESS Personal Information detail screen. Depending on your authorization, you may be able to add or edit your employee demographic information in this screen, including addresses, phone numbers, and e-mail addresses.

To add or change data in the Personal Information detail screen, complete the following steps.

1. Navigate to **Employee > Personal Information**.
   The Personal Information screen opens.

2. Add or edit the information as necessary, and in the upper right corner of the screen click **Save**.

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fields with asterisks are required.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tip</th>
</tr>
</thead>
<tbody>
<tr>
<td>To access additional address, phone, or e-mail records, click the arrow in the field showing the Primary option and select a different option from the list.</td>
</tr>
</tbody>
</table>

The Update Record dialog appears prompting you for the date that your change or addition should take effect.

![Update Record dialog](image)

3. Enter an effective date in the date field.

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>The effective date must be either the current date or a future date. The solution does not let you save a date in the past. If you need to make a change for a prior pay period, see your Human Resources department.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CAUTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The pay period in which the effective date falls is the pay period when the change you are submitting will occur.</strong></td>
</tr>
</tbody>
</table>

You can type the date in the field or use the date selector. To use the date selector, complete the following steps.

   - Click ![Date selector](image).
     A calendar opens.
B. To select a different year, click Month, Year in the calendar header twice and then click the arrows until the year you want appears. Click the desired year, month, and day.

C. To select a different month, click Month, Year in the calendar header for a list of all months, or click the arrows to navigate to a previous or future month of the currently selected year. Click the desired month and day.

D. To select a different day, click the desired day.

4. Click OK.

Note

If you manually entered the effective date, click to enable the OK button.
Personal Contacts

Personal contacts include your emergency contacts, spouse, dependents, and beneficiaries. In this detail screen you define these individuals and their demographic information.

View Personal Contacts

To open the Personal Contacts detail screen, complete the following steps.

1. Navigate to **Employee > Personal Contacts**.

   ![Personal Contacts Screen](image)

   If there are pending changes that will take effect at a future date, a message alert appears in a yellow bar above the grid. To display records with future changes in the grid, click the arrow at the end of the message.

2. To view a contact’s detailed information, select the contact in the grid and click **Edit**.
   The Personal Contacts detail screen opens.

   ![Personal Contacts Detail Screen](image)

3. Review information in the record.

   **Tip**
   Press **PAGE UP** or **PAGE DOWN** or use the scroll bars to bring additional information into view.
view.

4. When you are finished viewing, click Close.

**Add or Edit a Personal Contacts Record**

To add a new personal contact record or update values in a record, complete the following steps.

1. Navigate to **Employee > Personal Contacts**.

2. Do one of the following:
   - To update a contact, select the person and click **Edit**.
     
     **Tip**
     You can also remove a contact by selecting the person and clicking **Delete**, if you have appropriate permissions.

   - To add a contact, click **Add**.
   The Personal Contacts detail screen opens.

   **Note**
   Fields with asterisks are required.

3. Optional. Update the Personal Contact Information area, including name, relationship, and priority.

   **Note**
   Priority is only enabled for emergency contacts. Priority indicates in what order emergency contacts should be contacted in an emergency when there are multiple emergency contacts.

   **Note**
   In the Social Security Number field, enter nine digits with no punctuation.

4. Optional. In the Personal Contact Type area, select the types of contacts that applies to this person. The types you select determine which benefits you can attach the person to. You can select more than one option and should select all types that apply to this person
Since spouses are considered both dependents and beneficiaries, when you designate a personal contact to be a spouse, the Dependent and Beneficiary options are automatically selected and become read-only.
Example
You add your husband or wife as a contact, and identify them as a spouse (defaults to include both dependent and beneficiary as well) and emergency contact. You add a parent as a contact, and identify them only as a beneficiary and emergency contact.

Note
The Spouse option is read-only if you do not have permission to edit either the Dependent or Beneficiary field.

5. Optional. Update the Address Information area.
   A. Select the type of address for this contact from the list.
   B. Do one of the following:
      ▪ If the contact’s address information is the same as yours, select Same as Employee.
      ▪ If the contact’s address is different than yours, enter the address information.

6. Optional. Update the Phone Information area.
   A. Select the type of phone number from the list.
   B. Do one of the following:
      ▪ If the contact’s phone number is the same as yours, select Same As Employee.
      ▪ If the contact’s phone number is different than yours, enter the phone number in the Number field.

7. Optional. Update the Detail Information area with the contact's personal information, some of which is used for benefits eligibility.

8. In the upper right corner of the screen, click Save.
   The Update Record dialog appears prompting you for the date that your change or addition should take effect.

9. Enter an effective date in the date field.

Note
The effective date must be either the current date or a future date. The solution does not let you save a date in the past. If you need to make a change for a prior pay period, see your Human Resources department.
CAUTION

The pay period in which the effective date falls is the pay period when the change you are submitting will occur.

You can type the date in the field or use the date selector. To use the date selector, complete the following steps.

A. Click ☀.
   A calendar opens.

<table>
<thead>
<tr>
<th>January, 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Su</td>
</tr>
<tr>
<td>28</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>11</td>
</tr>
<tr>
<td>18</td>
</tr>
<tr>
<td>25</td>
</tr>
<tr>
<td>1</td>
</tr>
</tbody>
</table>

B. To select a different year, click Month, Year in the calendar header twice and then click the arrows until the year you want appears. Click the desired year, month, and day.

C. To select a different month, click Month, Year in the calendar header for a list of all months, or click the arrows to navigate to a previous or future month of the currently selected year. Click the desired month and day.

D. To select a different day, click the desired day.

10. Click OK.

Note

If you manually entered the effective date, click ☀ to enable the OK button.

You are returned to the Personal Contacts summary screen.
Chapter 3
Benefits

Topics in this chapter

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Benefit Balances. ............................................................. 25

The Benefits menu in ESS gives you access to view your current benefits, to enroll in benefit plans for which you are eligible during open enrollment, and to view your benefit plan balances and history.

In this chapter you will learn how to work with the Benefit Balances and Benefit Plans options that are in the Benefits menu.
Benefit Plans

Benefit plans includes basic information about your plans - such as medical, dental, life insurance, and retirement - that you can view. For example, you can see whether you are enrolled in a plan, when your coverage or participation is in effect, and your contribution.

Depending on your organization's policies, you may be enrolled in plans automatically or you may have access to elect future enrollments.

View Your Benefit Plans

To open the Benefit Plans detail screen, complete the following steps.

1. Navigate to **Benefits > Benefit Plans**.
   
   The Employee Benefit summary screen opens. Plans that you are currently enrolled in appear in the grid.

   ![Benefit Plans Grid]

   **Tip**
   
   Click **Plan Information** to open an internal or external information site that provides additional plan information.

2. To view a benefit plan in detail, select the benefit plan in the grid and click **View**.
   
   The plan detail screen opens.

   ![Plan Information]

3. Review information in the record.

4. When you are finished, in the upper right corner click **Close**.

Benefit Plan Details

The values on the Benefit Plan detail screen depend on the type of plan you select, but the following information typically appears.
Enroll in Benefits

There are several situations in which you can enroll in benefits:

- When you are recently hired or rehired.
- During your organization’s open enrollment period.
- When you have a qualified change in family status.

The enrollment wizard guides you through the steps needed to select and change benefit plans, dependents, and beneficiaries.

As you make selections to waive or enroll in a plan, the wizard may request additional information. If any interruptions occur or you need to track down information, you can exit the process and restart it later. The wizard will know where you left off and continue the enrollment at that point. The wizard recalls your most recent answers. You can revisit the enrollment process as often as you want during an enrollment period.

To open the enrollment wizard, complete the following steps.

1. Navigate to **Benefits > Benefit Plans**.
   
   The Employee Benefit summary screen opens. Plans that you are currently enrolled in appear in the grid.

2. Select the appropriate Benefit Enrollment Event if you qualify for more than one event. This is located to the right of the **Enroll** button.

   **Tip**
   
   Once you select an event the **Enroll** button will be enabled so that you can enroll in benefit...
3. Click **Enroll.**

**Note**
To review submitted and unsubmitted changes for benefit enrollment when the open enrollment period has ended but the plan’s effective date has not yet occurred, click the **View Pending Changes** button.

The enrollment wizard opens.

<table>
<thead>
<tr>
<th>Benefit Group</th>
<th>Group Effective Date</th>
<th>Enrollment Period End Date</th>
<th>Current Benefit Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long Term Disability</td>
<td>12/29/2012</td>
<td>11/11/2012</td>
<td>High Long Term Disability More Than 10 Years</td>
</tr>
<tr>
<td>Employee Supplemental Life Insurance</td>
<td>12/29/2012</td>
<td>11/11/2012</td>
<td>High Long Term Disability More Than 10 Years</td>
</tr>
<tr>
<td>Medical Plan</td>
<td>12/29/2012</td>
<td>11/11/2012</td>
<td>High PO Family Wellness</td>
</tr>
<tr>
<td>Dental Plan</td>
<td>12/29/2012</td>
<td>11/11/2012</td>
<td>High PO Family Wellness</td>
</tr>
<tr>
<td>Vision Plan</td>
<td>12/29/2012</td>
<td>11/11/2012</td>
<td>High PO Family Wellness</td>
</tr>
<tr>
<td>401(k)</td>
<td>12/29/2012</td>
<td>11/11/2012</td>
<td>High PO Family Wellness</td>
</tr>
<tr>
<td>Health Care Account</td>
<td>12/29/2012</td>
<td>11/11/2012</td>
<td>Health Care Account</td>
</tr>
<tr>
<td>Dependent Care Account</td>
<td>12/29/2012</td>
<td>11/11/2012</td>
<td>Health Care Account</td>
</tr>
</tbody>
</table>

The benefit enrollment process will guide you through the necessary procedures for enrolling or waiving of coverage. If for any reason you cannot complete the enrollment process, all of your selections will be saved and you can continue from where you left off. To begin the enrollment process click the **Start** button.

**Tip**
If your facility is using the automatic re-enrollment function, click **Auto Enroll** to re-enroll in your current benefit plans.

4. To continue using the enrollment wizard, click **Start** in the upper right of the screen.
5. Use the buttons in the upper right to navigate the enrollment wizard through the enrollment tasks.
   The screens in which you have already made an enrollment choice are in a tan box and have a check next to the benefit group.
The screen you are currently on is identified in green; screens in which you have not yet made an enrollment choice are in blue.

6. Select the option to either waive the benefit or to enroll in the plan, and click **Next**.
To access the URL attached to the benefit group and open an internal or external information site that provides additional plan group information, click **Group Information**.

To access the URL attached to the benefit plan and open an internal or external information site that provides additional plan information, click **more**....

Depending on the plan, you may be asked to provide additional information such as beneficiaries for life plans or a yearly contribution amount for a flexible spending account.

When you complete the wizard, the Enrollment Summary screen appears.

<table>
<thead>
<tr>
<th>Benefit Group</th>
<th>Benefit Plan</th>
<th>Election Amount</th>
<th>Deduction Amount</th>
<th>Net Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Supplemental Life Insurance</td>
<td>Waive Benefit</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Current: GHI Long Term Disability More Than 10 Years</td>
<td>$131.76</td>
<td>$5.07</td>
<td>$5.07</td>
</tr>
<tr>
<td></td>
<td>New: GHI Long Term Disability More Than 10 Years</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Current: GHI PPO Family Wellness</td>
<td>$5100.00</td>
<td>$212.50</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>New: GHI PPO Family Wellness</td>
<td>$5100.00</td>
<td>$212.50</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Current: GHI Dental Plan</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>New: GHI Dental Plan</td>
<td>$38.32</td>
<td>$2.43</td>
<td>$2.43</td>
</tr>
<tr>
<td></td>
<td>Current: Waive Benefit</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>New: Waive Benefit</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
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<tr>
<td></td>
<td>Current: Waive Benefit</td>
<td>$0.00</td>
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</tr>
<tr>
<td></td>
<td>New: Waive Benefit</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
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<tr>
<td></td>
<td>Current: Waive Benefit</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>New: Waive Benefit</td>
<td>$0.00</td>
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<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Current: Waive Benefit</td>
<td>$0.00</td>
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<tr>
<td></td>
<td>New: Waive Benefit</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Current: Waive Benefit</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>New: Waive Benefit</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Current: Waive Benefit</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>New: Waive Benefit</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

* Estimated Calculation.

To complete the enrollment process, you must submit your benefit selections. **Submit**.

Tip

To edit a plan, click **Previous** in the upper right to go back to the last step in the enrollment. To edit a specific plan, instead click the **Edit** button next to it.

7. To complete the enrollment process, click **Submit**.
Designate Beneficiaries

If you choose to enroll in a life plan, the Beneficiary area opens so you can designate beneficiaries.

1. Select the box next to each beneficiary you want to designate for this benefit.

   **Note**
   To add a new beneficiary who does not appear in this grid, click **Add**. The Employee Personal Contact form opens. Complete the form and click **Save**. For more information, see "Add or Edit a Personal Contacts Record" on page 15.

2. Select **Primary** or **Secondary** from the Type list.
3. Enter the percent of the benefit you want to assign to this beneficiary in the Percent field.
   If you have more than one primary or one secondary beneficiary, the percent totals must equal 100 for each beneficiary type.

Choose a Flexible Spending Account Deduction Amount

If you choose to participate in a flexible spending account, you need to designate the yearly amount that you want to have deducted.

1. Enter the yearly amount in the Election Amount field.
2. Click **Calculate Deduction**.
Benefit Balances

Benefit balances list the hours or dollars for the benefit leave plans you are currently enrolled in, including the available balances, amounts accrued, amounts taken, and entitlement values. From the summary screen you can drill down to further details about the history of each plan, which lists any accrual transactions and time you took that deducted from the plan.

View Your Benefit Balances

When you review benefits you have the option to view just your benefit balances, or to look at the transaction history of a specific plan.

To Open the Benefit Balances Summary Screen

- Navigate to Benefits > Benefit Balances.
  

To Open the Benefit Leave History Detail Screen

1. Navigate to Benefits > Benefit Balances.
   
2. To view the transaction history for a plan, select the plan in the grid and click View History.
   
The Benefit Leave History detail screen opens.
3. Set the range of time for which you want to view transactions in the Check Date fields.
   These are the check dates in which the leave time was accrued or taken.
   You can type the date in the field or use the date selector. To use the date selector, complete the following steps.
   
   **A. Click $\text{date selector}$**.
   A calendar opens.
   
   1 2 3
   4 5 6 7 8 9 10
   11 12 13 14 15 16 17
   18 19 20 21 22 23 24
   25 26 27 28 29 30 31

   **B. To select a different year, click $\text{Month, Year}$ in the calendar header twice and then click the arrows until the year you want appears. Click the desired year, month, and day.**

   **C. To select a different month, click $\text{Month, Year}$ in the calendar header for a list of all months, or click the arrows to navigate to a previous or future month of the currently selected year. Click the desired month and day.**

   **D. To select a different day, click the desired day.**

4. **Click Apply Filter.**
   A summary of all transactions within the time range you selected appears. When you navigate to a different page, your applied filter is cleared.

5. To close the leave plan history detail, in the upper right corner click **Close**.

**Benefit Leave History Details**

The following information typically appears for your leave history.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accrued</td>
<td>Hours or dollars earned.</td>
</tr>
<tr>
<td>Taken</td>
<td>Hours or dollars used.</td>
</tr>
<tr>
<td>Entitlement</td>
<td>Hours or dollars earned during the plan year but not available for use until the following plan year. When a new accrual year begins, the system adds the amount in the Entitlement field to the Available field on the Employee Benefit Balances summary screen, and resets the Entitlement amount to zero.</td>
</tr>
</tbody>
</table>
Chapter 4
Payroll

Topics in this chapter

- Direct Deposit .................................................................................................................................................. 28
- Pay Checks ....................................................................................................................................................... 35
- Deductions ....................................................................................................................................................... 39
- Earnings ......................................................................................................................................................... 42
- Taxes ............................................................................................................................................................... 45
- W-2 Forms ....................................................................................................................................................... 49

The Payroll menu in ESS gives you access to do the following:

- View, add, edit, or delete your direct deposit information.
- View or print pay check earnings statements.
- View pay check deduction and earnings history.
- Edit tax filing status and withholding allowances.
- Print W-2 reports.

In this chapter you will learn how to work with the many options that are in the Payroll menu.
Direct Deposit

The direct deposit feature in ESS allows you to split your pay check between two or more accounts. Depending on your organization's authorization, you may be able to view, add, edit, or delete direct deposit information from the Direct Deposit summary screen in ESS.

Current accounts established for payments appear in one of two grids:

- Fixed amounts, which are processed first, appear in the upper grid. When multiple accounts are specified, amounts are processed in the order they appear.
- Percent amounts, which are processed after fixed amounts, appear in the lower grid. When multiple accounts are specified, amounts are processed in the order they appear and are calculated as a percent of the remaining net.

**Note**
The sum of all percentage amounts must total 100%. When the percentages do not total 100%, a paper check for the remainder is generated.

Add a Direct Deposit

To add a direct deposit record, complete the following steps.

1. Navigate to **Payroll > Direct Deposit**.
   The Direct Deposit summary screen opens.
2. Click **Add**.
   The Direct Deposit detail screen opens.
3. Add your Bank Information.
   A. Select a bank from the Bank list.
      If your bank does not appear in the list, contact your payroll department.
   B. Select **Savings** or **Checking** from the Account Type list.
   C. Enter your account number.

4. In the Transaction Details area, do the following:
   A. In the Amount field, enter the amount or percentage you want to go to this account.
   B. Select **Dollars** or **Percent** from the Amount Type list.

   **Note**
   The Percent amount indicates the percentage of the remaining net and not the percentage of the gross amount.

   C. Select the pay period frequency for the direct deposit account to process from the Frequency list.
D. Select the check from which the direct deposit is to be taken from the Check Selection list. The choices are:
   - All Checks
   - Primary Checks Only - The first pay check processed for an employee in a regular, on demand, or special payroll.
   - Secondary Checks Only - A pay check processed in addition to the primary pay check for special pays such as bonuses and retroactive payments.

5. Click **Apply**.
   The Update Record dialog appears prompting you for the date that your change or addition should take effect.

![Update Record Dialog](image)

6. Enter an effective date in the date field.

   **Note**
   The effective date must be either the current date or a future date. The solution does not let you save a date in the past. If you need to make a change for a prior pay period, see your Human Resources department.

   **CAUTION**
   The pay period in which the effective date falls is the pay period when the change you are submitting will occur.

You can type the date in the field or use the date selector. To use the date selector, complete the following steps.

A. Click 

   A calendar opens.
B. To select a different year, click **Month, Year** in the calendar header twice and then click the arrows until the year you want appears. Click the desired year, month, and day.

C. To select a different month, click **Month, Year** in the calendar header for a list of all months, or click the arrows to navigate to a previous or future month of the currently selected year. Click the desired month and day.

D. To select a different day, click the desired day.

7. Click **OK**.

**Note**

If you manually entered the effective date, click to enable the OK button.

**View or Edit a Direct Deposit**

To open a direct deposit record or update values in a record, complete the following steps.

1. Navigate to **Payroll > Direct Deposit**.
   
The Direct Deposit summary screen opens.

2. Select the direct deposit record you want to view or change, and click **Edit**.
   
The Direct Deposit detail screen opens.

3. If you don't want to make any changes, review the record and in the upper right corner of the screen click **Close**.
4. If you want to make changes, add or edit the information as necessary and in the upper right corner of the screen click **Apply**.

**Note**
Fields with asterisks are required.

The Update Record dialog appears prompting you for the date that your change or addition should take effect.

![Update Record dialog](image)

5. Enter an effective date in the date field.

**Note**
The effective date must be either the current date or a future date. The solution does not let you save a date in the past. If you need to make a change for a prior pay period, see your Human Resources department.

**CAUTION**
The pay period in which the effective date falls is the pay period when the change you are submitting will occur.

You can type the date in the field or use the date selector. To use the date selector, complete the following steps.

A. Click ![calendar icon].

A calendar opens.

![Calendar](image)

B. To select a different year, click **Month, Year** in the calendar header twice and then click the arrows until the year you want appears. Click the desired year, month, and day.
C. To select a different month, click **Month, Year** in the calendar header for a list of all months, or click the arrows to navigate to a previous or future month of the currently selected year. Click the desired month and day.

D. To select a different day, click the desired day.

6. Click **OK**.

**Note**

If you manually entered the effective date, click to enable the **OK** button.

---

**Change the Priority of Direct Deposit Amounts**

When multiple accounts are listed in either the fixed amount or the percent amount grid on the Direct Deposit summary screen, amounts are deposited in the order they appear.

To change the priority in which the deposits occur, complete the following steps.

1. Navigate to **Payroll > Direct Deposit**.
   The Direct Deposit summary screen opens.
2. In either the fixed amount or the percent amount grid, click the **Move Up** or the **Move Down** button next to the direct deposit account you want to move.
3. In the upper right corner of the screen, click **Save**.

---

**Delete a Direct Deposit**

To delete a direct deposit record, complete the following steps.

1. Navigate to **Payroll > Direct Deposit**.
   The Direct Deposit summary screen opens.
2. Select the direct deposit record you want to remove, and click **Delete**.
   The Delete Record dialog appears prompting you for the date that your deletion should take effect.

   **Delete Record**

   Please enter a date on or after today for which the change will take effect.

   <M/d/yyyy>

   ![Image](https://via.placeholder.com/150)

3. Enter an effective date in the date field.
Note
The effective date must be either the current date or a future date. The solution does not let you save a date in the past.

You can type the date in the field or use the date selector. To use the date selector, complete the following steps.

A. Click .

A calendar opens.

B. To select a different year, click Month, Year in the calendar header twice and then click the arrows until the year you want appears. Click the desired year, month, and day.

C. To select a different month, click Month, Year in the calendar header for a list of all months, or click the arrows to navigate to a previous or future month of the currently selected year. Click the desired month and day.

D. To select a different day, click the desired day.

4. Click OK.

Note
If you manually entered the effective date, click to enable the OK button.
Pay Checks

The pay check feature in ESS allows you to easily view your pay check history, and view or print a particular check's earning statement. If you have elected direct deposit as the form of payment instead of a pay check, this is your paperless check option.

View Your Pay Check History

To review your pay check history, complete the following steps.

1. Navigate to Payroll > Pay Checks.
   The Pay Checks summary screen opens.

2. Set the range of time for which you want to view pay checks in the Check Date fields.
   You can type the date in the field or use the date selector. To use the date selector, complete the following steps.
   A. Click .
      A calendar opens.
   B. To select a different year, click Month, Year in the calendar header twice and then click the arrows until the year you want appears. Click the desired year, month, and day.
   C. To select a different month, click Month, Year in the calendar header for a list of all months, or click the arrows to navigate to a previous or future month of the currently selected year. Click the desired month and day.
   D. To select a different day, click the desired day.
3. Click **Apply Filter**.
   A summary of all pay checks within the time range you selected appears. When you navigate to a different page, your applied filter is cleared.

**View Your Pay Check Earnings Statements**

To open one of your pay check earnings statement, complete the following steps.

1. Navigate to **Payroll > Pay Checks**.
The Pay Checks summary screen opens.

2. Select the pay check you want to view in detail, and click **View Statement**.
The Earnings Statement detail screen opens.

**Note**
You are not allowed to edit your earnings statement.
The General Information section contains information regarding your job, pay rate, and check. Below that you will find current and year-to-date information about your earnings, taxes, and deductions. There is also a sample of your check, which serves as your paperless check option when you have elected direct deposit as your form of payment.

3. Optional. To print your earnings statement, in the upper left corner click **Print Statement**.
4. To close the earnings statement, in the upper right corner click **Close**.

### Print Your Earnings Statements

To print one of your earnings statements, complete the following steps.

1. Navigate to **Payroll > Pay Checks**.
   
   The Pay Checks summary screen opens.
   
   Do one of the following:
   
   • Select the pay check you want to print, and click **Print Statement**.
   
   The printable Earnings Statement opens, from which you can click **.**
Select the pay check you want to view in detail, and click **View Statement**. The Earnings Statement detail screen opens.

In the upper left corner, click **Print Statement**.
Deductions

The deduction feature in ESS allows you to easily view your effective deductions, including employer amounts and arrears activity. You can also view or print the earnings statement associated with a particular deduction.

View Your Pay Check Deductions

When you review deductions you have the option to view just the summary of your deductions, or to look at the transaction history of a specific deduction.

To Open the Deductions Summary Screen

- Navigate to Payroll > Deductions.
  The Deductions summary screen opens. A summary of your deductions appears in the grid.

  Note
  You are not allowed to edit your deductions.

To Open the Deduction History Detail Screen

1. Navigate to Payroll > Deductions.
   The Deductions summary screen opens. A summary of your deductions appears in the grid.

2. To view the transaction history for a specific deduction, select the deduction in the grid and click View History.
   The Deduction History detail screen opens.
3. Set the range of time for which you want to view deductions in the Check Date fields. These are the check dates in which the deductions were taken. You can type the date in the field or use the date selector. To use the date selector, complete the following steps.

A. Click the calendar.

A calendar opens.

B. To select a different year, click Month, Year in the calendar header twice and then click the arrows until the year you want appears. Click the desired year, month, and day.

C. To select a different month, click Month, Year in the calendar header for a list of all months, or click the arrows to navigate to a previous or future month of the currently selected year. Click the desired month and day.

D. To select a different day, click the desired day.

4. Click Apply Filter.

A summary of all transactions within the time range you selected appears. When you navigate to a different page, your applied filter is cleared.
5. To view the earnings statement in which a deduction appears, select the instance of the deduction that you want to view and in the upper left corner click **View Statement**. The Earnings Statement detail screen appears. Deductions appear below the General Information, Earnings, and Taxes areas.

6. Optional. To print your earnings statement, in the upper left corner click **Print Statement**.

7. To close the earnings statement, in the upper right corner click **Close**.

8. To close the Deduction History detail screen, in the upper right corner click **Close**.
Earnings

The earnings feature in ESS allows you to easily view a history of each earning type from your pay checks, including check dates, hours worked, and dollars earned. You can also view or print the earnings statement associated with a check in which a particular earning type was paid out.

View Your Pay Check Earnings

When you review pay check earnings you have the option to view a list of earnings as they relate to the current pay check and year-to-date earnings, or to look at the pay check history of a specific earning.

To Open the Employee Pay Check Earnings Summary Screen

- Navigate to **Payroll > Earnings**.
  
  The Employee Pay Check Earnings summary screen opens. A list of earnings appears in the grid.

  **Note**
  
  You are not allowed to edit your earnings records.

To Open the Earnings History Detail Screen

1. Navigate to **Payroll > Earnings**.
   
   The Employee Pay Check Earnings summary screen opens. A list of earnings appears in the grid.

2. To view the pay check history for a specific earning, select the earning record in the grid and click **View History**.
The Earnings History detail screen opens.

3. Set the range of time for which you want to view the earnings in the Check Date fields. These are the check dates in which the earnings were taken. You can type the date in the field or use the date selector. To use the date selector, complete the following steps.

A. Click .

A calendar opens.

<table>
<thead>
<tr>
<th>Su</th>
<th>Mo</th>
<th>Tu</th>
<th>We</th>
<th>Th</th>
<th>Fr</th>
<th>Sa</th>
</tr>
</thead>
<tbody>
<tr>
<td>28</td>
<td>29</td>
<td>30</td>
<td>31</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
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<td>30</td>
<td>31</td>
</tr>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
</tbody>
</table>

B. To select a different year, click **Month, Year** in the calendar header twice and then click the arrows until the year you want appears. Click the desired year, month, and day.

C. To select a different month, click **Month, Year** in the calendar header for a list of all months, or click the arrows to navigate to a previous or future month of the currently selected year. Click the desired month and day.

D. To select a different day, click the desired day.

4. Click **Apply Filter**. A summary of all transactions for that earning within the time range you selected appears. When you navigate to a different page, your applied filter is cleared.

5. To view the earnings statement in which an earning appears, select the instance of the earning that you want to view and in the upper left corner click **View Statement**.
The Earnings Statement detail screen appears. Earnings appear below the General Information area.

6. Optional. To print your earnings statement, in the upper left corner click **Print Statement**.

7. To close the earnings statement, in the upper right corner click **Close**.

8. To close the Earnings History detail screen, in the upper right corner click **Close**.
Taxes

The taxes feature in ESS allows you to easily view and edit information for certain taxes that are withheld from your pay checks.

The information you see in the Tax detail screen and the fields you can edit depends on the tax type. Contact your payroll department with any questions.

View Tax Information

To review your tax information, complete the following steps.

- Navigate to Payroll > Taxes.
  The Tax Information summary screen opens.

Edit Your Tax Withholding Information

To update a tax withholding record, complete the following steps.

**CAUTION**
**Before changing your tax withholding information, consult with a qualified tax advisor.**

1. Navigate to Payroll > Taxes.
   The Tax Information summary screen opens.
2. Select the tax withholding record you want to change, and click Edit.
The Tax detail screen opens.

3. If you don't want to make any changes, review the record and in the upper right corner of the screen click Close.

4. If you want to make changes, edit the information as necessary and in the upper right corner of the screen click Save.

To electronically sign the record, enter your employee number in the Value field in the Electronic Signature section.
The Update Record dialog appears prompting you for the date that your change or addition should take effect.

5. Enter an effective date in the date field.

**Note**
The effective date must be either the current date or a future date. The solution does not let you save a date in the past. If you need to make a change for a prior pay period, see your Human Resources department.

**CAUTION**
The pay period in which the effective date falls is the pay period when the change you are submitting will occur.

You can type the date in the field or use the date selector. To use the date selector, complete the following steps.

A. Click ☐.

A calendar opens.

B. To select a different year, click **Month, Year** in the calendar header twice and then click the arrows until the year you want appears. Click the desired year, month, and day.

C. To select a different month, click **Month, Year** in the calendar header for a list of all months, or click the arrows to navigate to a previous or future month of the currently selected year. Click the desired month and day.

D. To select a different day, click the desired day.
6. Click OK.

Note

If you manually entered the effective date, click [ ] to enable the OK button.

View Taxes Withheld From Your Pay Checks

To see the actual tax amounts withheld from your pay checks, see "View Your Pay Check Earnings Statements" on page 36.
W-2 Forms

The W-2 feature in ESS allows you to easily view and print your W-2 report for a specific year and employer. If historical W-2 data exists in Human Resources and Payroll, you can view W-2 reports as far back as 2008.

View and Print Your W-2 Form Reports

CAUTION
Although ESS refers to W-2 Forms, these are not official W-2 forms and cannot be used in filing taxes.

To open one of your W-2 form reports, complete the following steps.

1. Navigate to Payroll > W-2 Forms.
   The W-2 Forms summary screen opens.

   Note
   You are not allowed to edit your W-2 forms.

   ![W-2 Forms Summary Screen]

2. Select the year you want to view in detail, and click Print Statement.
   The printable W-2 form report opens, from which you can click to print it.
3. To close the W-2 form report, in the upper left corner click **Back**.

4. To exit ESS, in the upper left corner click **Sign out**.
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