Click on the topic in the Table of Contents below (or in the menu on the left side of the screen if converted to PDF with bookmarks displayed). This will bring you to the Help page for that topic.

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Employee Self Service

Registering for Employee Self Service

1. Go to http://www.ourschools.edu/selfservice. The Self Service Log In page displays.

2. Click on Register for My Account. The Register for My Account page displays.
3. Enter the following information to register for a Self Service Account:
   - Date of Birth (MM/DD/YYYY)
   - Last 4 digits of SSN (Social Security number)
   - Home Zip Code (5 digits)

4. Click on Next. A new Register for My Account page displays to select your employee record.
   - NOTE: You must register an account for each employee ID number if you have multiple employee IDs, such as a rehired retiree.

5. Select the appropriate radio button for the employee ID number for which you are creating
an account.

6. Click on **Next**. A new **Register for My Account** page displays to create your User Account.

![Register for My Account Form]

7. Enter the following User Account and Security Information:
   - **User ID**
     - Minimum 6 characters, maximum 30 characters
   - **Password**
     - 8 characters, with at least 2 digits, no special characters
   - **Confirm Password**
   - **Email Address**
     - Business or personal
   - **Confirm Email**
   - **Hint Question**
     - Click on the **ander** and select an option for a Password Hint question from the drop-down list:
       - Name of the High School you graduated from
       - The city where you were born
       - Your mother’s maiden name
   - **Response**
     - Enter the answer to your Password Hint question.

8. Click on **Next**. The **Registration Complete** page displays.
9. Verify that a message displays saying you have successfully created your self service account.
   - **NOTE:** You may receive one of the following messages:
     - You have already registered for Self Service. Please go to the Login page and choose the “Forgot My User Name or Password” link if you need assistance finding your original login information. Employee Status/ID: Active XXXXXX.
       - This message indicates that you already have a Self Service login.
     - The information provided does not match and self service eligible employee. Please note that terminated employees will only have self service access for 24 months from the date of termination.
       - If you receive this message, verify the information that you input. Information must match with your personal information stored within the system exactly. If you are unable to resolve the error, contact your HR representative for further instructions.
     - You have more than one Employee ID and must register a separate account for each Employee ID that you want to access.
       - Select one employee account, then select NEXT to continue.

10. Click on [Sign out](#). The [Self Service Log In](#) page displays, allowing you to log into Employee Self Service.
Logging into Employee Self Service

1. Go to http://www.ourschools.edu/selfservice. The Self Service Log In page displays.

2. Enter your User ID.

3. Enter your Password.
   - **NOTE 1:** You have four grace tries to log into Employee Self Service. After five cumulative tries, you will be locked out of the system. You can reset your access to the system by following the steps in the Forgotten Your Password? section starting on page 10.
   - **NOTE 2:** Your Password will automatically expire after 180 days. You must then reset your Password to a new one that has not been previously used.

4. Click on **Sign In**. The Employee Home page displays.
5. Click on the appropriate **Home link** to access the following information

- **Personal**
- **Benefits**
- **Payroll and Compensation**
- **Leave Balances**
- **Travel and Expense**

- **NOTE:** The link to your Travel and Expense information will **not** be available until you enable the T&E Home pagelet, which you do by clicking on the **Setup Expense Reimbursement Options** link shown above and verifying your Address and Direct Deposit Balance Account information. Once you verify this information, you need to log out, and then log back into Self Service. The **Travel and Expense Home** link will be available, as shown below.

Please refer to **Your Travel and Expense Information**, starting on page 78, for more information on enabling the T&E Home Pagelet and accessing your Travel and Expense information.
Forgotten your User ID?

If you have forgotten your User ID, you can search for your User Profile as follows.

1. Click on **Forgot My Username or Password** on the **Employee Self Service Log In** page. The **Forgot User ID or Password** page displays.

   **Forgot User ID or Password**

   ![Forgot User ID or Password form]

   - **Privacy and Security**
     Your personal information is completely private and will not be disclosed to any outside organization without your expressed written consent.

   - If you know your User ID but have forgotten the password, click **Forgot Password**.

   - If you have forgotten your User ID, please provide the following personal information and click **Next** in order to search for your User Profile.

     - **Date of Birth** (MM/DD/YYYY)
     - **Last 4 digits of SSN** (Social Security number)
     - **Home Zip Code** (5 digits)

   - Click on **Next**. The **Forgot My User ID** page displays.

2. Enter the following information:
   - **Date of Birth** (MM/DD/YYYY)
   - **Last 4 digits of SSN** (Social Security number)
   - **Home Zip Code** (5 digits)

3. Click on **Next**. The **Forgot My User ID** page displays.

   **Forgot My User ID**

   ![Forgot My User ID form]

   - **Registered User Profiles**:
     - Employee Name: Employee, Sample A
     - User ID: SAMPLE_EMPLOYEE

   - Select **NEXT** to continue.

4. Verify your **User ID**.
Forgotten your Password?

If you know your User ID but have forgotten your Password, you can create a new Password as follows.

1. Click on [Forgot My Username or Password] on the PeopleSoft Log In page. The [Forgot User ID or Password] page displays.

2. Click on [Forgot Password]. The [Forgot My Password] page displays.

   **Forgot My Password**

   If you have forgotten your password, or your password has expired.
   You can change your password now by following the instructions below.

   Enter your User ID below. This will be used to find your profile, in order to authenticate you.

   **User ID** [SAMPLE_EMPLOYEE]

   Select NEXT to continue.
3. Enter your **User ID** in the **User ID** field.

4. Click on **Next**. The **Change Password** page displays.

   ![Change Password](image)

5. Enter the **answer to your Password Hint question** in the **Response** field.

6. Click on **Next**. A new **Change Password** page displays.

   ![Change Password](image)

7. Enter your **new password** in the **New Password** field.

8. Re-enter your **new password** in the **Confirm Password** field.

9. Click on **Change Password**. The **Change Password** page reappears.
NOTE: You cannot reuse a password. If you do, you will receive the following message:

![Microsoft Internet Explorer dialog box indicating a password has been previously used.](image)

Click on **OK** to continue.

10. Click on **Sign out** and log into your self service account.

Forgotten the answer to your Password Hint question? You can have a new system-generated password sent to your email address so you can gain access to your account and reset your password.

1. Click on **Back**. This takes you back to the **Change Password** page.
2. Click on **Email New Password**. A password will be sent to the e-mail address you entered in your **Register for My Account** page.

3. Click on **Sign out**. This brings you to the **Employee Self Service Log In** page.

- **NOTE**: For security reasons, system-generated passwords are set to expire after you use it to log in, and you must reset your password immediately.
4. Enter your **User ID** in the **User ID** field.

5. Enter the **system-generated password** in the **Password** field.

6. Click on **Sign In**. The following message displays.

   ![Oracle Peoplesoft Enterprise]

   Your password has expired.

   [Click here to change your password]

7. Click on **Click here to change your password**. The **Change Password** page displays.
8. Enter your system-generated password in the Current Password field.

9. Enter your new password in the New Password field.

10. Re-enter your new password in the Confirm Password field.

11. Click on Change Password. The Password Saved page displays.

12. Click on Return. The Employee Home page displays.
**My System Profile**

*My System Profile* is where you can set up or change your personal preferences, such as passwords, email, and language. The default information in your System Profile comes from the information you entered when you registered for Employee Self Service.

To review or make changes to your system profile, click on *My System Profile* on the Employee Home page, and then choose the type of information to review or change on the General Profile Information page.
NOTE: With the addition of the new Travel and Expense functionality, which uses PeopleSoft Financials as well as HRMS, a separate My System Profile was added to PeopleSoft Financials as well. Please note the following:

- Passwords in both Financials and HRMS will be in sync between the two systems.
- Password help will not work in Financials. You must use this in HRMS.
- The email address you add in HRMS Self Service will sync to Financials. However, if you add a different email address in Financials, it will not sync back to HRMS.

Refer to page 83 for more information on the Financials My System Profile.
Changing Your Password


5. Click on [OK]. This takes you back to the [General Profile Information] page.

6. Click on [Save] to save your changes.

7. Click on [Change or set up forgotten password help] on the [General Profile Information] page if you have forgotten your password. The [Change or set up forgotten password help] page displays.


   - [NOTE]: These fields were originally populated with the information you entered when you registered your account. You can change these here if needed.

10. Click on [OK].

11. Use Steps 1-6 to reset your password each time you receive a system-generated password.
NOTE 1: For security reasons, system-generated passwords are set to expire after you use it to log in, and you must reset your password immediately. Refer to Forgotten Your Password? starting on page 10 for more information.

NOTE 2: With the addition of the new Travel and Expense functionality, which uses PeopleSoft Financials as well as HRMS, a separate My System Profile was added to PeopleSoft Financials as well. Please note the following:
- Passwords in both Financials and HRMS will be in sync between the two systems.
- Password help will not work in Financials. You must use this in HRMS.

Refer to page 83 for more information on the Financials My System Profile.
Changing Your Personalizations

Personalization options are available to set up or change accessibility features if you are visually impaired or use a visually enhanced computer screen. You can set up or change those options as follows.

1. Click on **Change Personalizations** in the **Personalizations** group box on the **General Profile Information** page. The **Personalizations** page displays.

2. Click on **Personalize Option**. The **Option Category** page for Accessibility Features displays.

3. Click on the ▼ in the **Override Value** field. A drop-down list of accessibility options displays.

4. Select **Use accessibility layout mode** to activate the accessibility features.
• **NOTE 1:** You can click on **Explain** to display a **Personalization Explanation** page with detailed information for each option. Click on **OK** to return to the **Option Category: General Options** page.

• **NOTE 2:** You can click on **Restore Option to Default** on this page to return the option to its default value if you do not like the change that you made.

5. Click on **OK** to accept the changes that you made. This brings you to the **Save Confirm** page.

• **NOTE:** You can click on **Restore Category Defaults** to return all the options to their default values if you do not like the changes that you made.

![Save Confirm]

Your Personalizations have been saved.

6. Verify ✓ **Your Personalizations have been saved** appears.

7. Click on **Return**. This brings you back to the **Personalizations** page.

8. Click on **Cancel**. This brings you back to the **General Profile Information** page.

• **NOTE:** You can click on **Restore Defaults** to restore all the personalizations to their default values.

9. Click on **Save** to save your changes.
Editing Your Email Addresses

1. Click on **Edit Email Addresses** in the **Email** group box on the **General Profile Information** page. The **Email Addresses** page displays.

2. Click the **Primary Email Account** check box ON in the row for the email address that you want to be your primary email address.
   - **NOTE 1**: Only one email address may be designated as Primary.
   - **NOTE 2**: Any Employee Self Service email confirmations will be sent to the **Primary Email Address** you set up here.
   - **NOTE 3**: With the addition of the new Travel and Expense functionality, which uses PeopleSoft Financials as well as HRMS, a separate **My System Profile** was added to PeopleSoft Financials as well. Please note the following:
     - The email address you add in HRMS Self Service will sync to Financials. However, if you add a different email address in Financials, it will **not** sync back to HRMS.
     - Refer to page 83 for more information on the Financials My System Profile.

3. Click on **+** to add a new row for any additional email address(es) you would like to add.

4. Enter or select the **email type** in the **Email Type** field.

5. Enter the **email address** in the **Email Address** field.

6. Click on **-** in the row for the email address(es) that you want to delete. The following dialog box will display:

7. Click on **OK** to confirm the deletion, or on **Cancel** to cancel the deletion. This
brings you back to the **Email Addresses** page.

8. Click on **OK** to accept your changes, or on **Cancel** to exit the page without accepting your changes. This brings you back to the **General Profile Information** page.

9. Click on **Save** to save your changes.
Your Personal Information

Reviewing Your Personal Information


2. Click on Personal Information Home to go to the Personal Information Home page.
   - **NOTE:** You can also select Self Service, Employee, Home, Personal Information Home. The Personal Information Home page displays.

3. Click on Personal Information Summary. The Personal Information page displays.
   - You can also select Self Service, Employee, View, Personal Information Summary.
4. Review the information in the following sections:
   - **Name**
   - **Addresses**
     - **NOTE:** You can click on the buttons in each section, such as [Change name], to go directly to the appropriate page to change the information in that section.

5. Review the information in the following sections:
   - **Phone Numbers**
   - **Emergency Contacts**
   - **Marital Status**
• **NOTE:** You can click on the buttons in each section, such as 

![Change phone numbers](image)

to go directly to the appropriate page to change the information in that section.

---

### Employee Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td>Male</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>01/01/1950</td>
</tr>
<tr>
<td>Birth Country</td>
<td></td>
</tr>
<tr>
<td>Birth Status</td>
<td></td>
</tr>
<tr>
<td>Social Security Number</td>
<td>View details</td>
</tr>
<tr>
<td>Smoker Status</td>
<td>Non Smoker</td>
</tr>
<tr>
<td>Ethnic Group</td>
<td>White</td>
</tr>
<tr>
<td>Date Entitled to Medicare</td>
<td></td>
</tr>
<tr>
<td>Military Status</td>
<td>Not indicated</td>
</tr>
<tr>
<td>Original Hire Date</td>
<td>05/10/1999</td>
</tr>
<tr>
<td>Highest Education Level</td>
<td>J-Doctorate (Academic)</td>
</tr>
</tbody>
</table>

Contact the Human Resources department if any of your Employee Information is incorrect.

---

6. Review the information in the following sections:
   - **Employee Information**
     - **NOTE:** For security reasons, your Social Security number is not shown. You can see this number by placing your mouse/cursor over ![View details](image) and the number will be shown in a hover-text box.

7. Click on [Personal Information Home](#) to return to the **Personal Information Home** page.
Changing Your Marital Status

**NOTE:** After you submit your marital status change in Employee Self Service, you also need to provide a copy of the supporting marriage certificate, divorce decree, or death certificate to your Human Resources office within 31 days of the effective date of the change.

1. Select **Self Service, Employee, Home, Employee Home**. The **Employee Home** page displays.

2. Click on **Personal Information Home** to go to the **Personal Information Home** page.
   - **NOTE:** You can also select **Self Service, Employee, Home, Personal Information Home**. The **Personal Information Home** page displays.

3. Click on **Marital Status Change** under **Personal Information Summary**. The **Request Marital Status Change** page displays.
   - **NOTE 1:** You can also select **Self Service, Employee, Tasks, Marital Status**.
   - **NOTE 2:** Fields marked with an * are required fields.

4. Enter the **Date Change Will Take Effect**.

5. Verify your **Current Marital Status**.

6. Click on the and select the appropriate **Change Marital Status To** from the drop-down list.

7. Click on **Submit**. The **Request Marital Status Change Submit Confirmation** page displays.
8. Verify ✓ The Submit was successful. appears.

9. Click on OK. This brings you back to the Request Marital Status Change page.

10. Verify This information was submitted. appears.

11. Verify the marital status change information.

   • NOTE 1: You will receive an email at your Primary email address confirming that your request was submitted. If you do not receive an email, please verify your Primary email address in My System Profile, as discussed in Editing Your Email Addresses.

   • NOTE 2: You will receive an email at your Primary email address confirming that your request was approved by the appropriate administrator and the change has been saved to
the database. If you do not receive an email, please verify your Primary email address in My System Profile, as discussed in Editing Your Email Addresses on page 22 of this document.

Your request was approved:

Approver Name:
Transaction Name: Marital Status
Employee Name: Sample Employee
EmpId: 000033
Changing Your Name

NOTE: After you submit your name change in Employee Self Service, you also need to provide a copy of your new Social Security card with your new name to your Human Resources office before the change can be approved.


2. Click on Personal Information Home to go to the Personal Information Home page.
   • NOTE: You can also select Self Service, Employee, Home, Personal Information Home. The Personal Information Home page displays.

3. Click on Name Change in the Personal Information Summary section. The Name Change page displays.
   • NOTE: You can also select Self Service, Employee, Tasks, Name Change.

4. Review the information in the Current Name section.

5. Enter the Date Name Change will Take Effect in the New Name section.

6. Enter or select your new name information in the fields in the New Name group box.
   • NOTE: Fields marked with an * are required fields.
7. Click on Submit. The Name Change Submit Confirmation page displays.

8. Verify The Submit was successful. appears.

9. Click on OK. This brings you back to the Name Change page.

10. Verify This information was submitted. appears.

11. Verify the name change information in the New Name section.
   - NOTE: You will receive a confirmation email at your Primary email address confirming that your request was submitted. If you do not receive an email, please verify your Primary email address in My System Profile, as discussed in Editing Your Email Addresses on page 22 of this document.
• NOTE 2: You will receive an email at your Primary email address confirming that your request was approved by the appropriate administrator and the change has been saved to the database. If you do not receive an email, please verify your Primary email address in My System Profile, as discussed in Editing Your Email Addresses on page 22 of this document.

From: noreply@usq.edu
To: sample.employee@yahoo.com

Your request was approved.

Approver Name: 
Transaction Name: Name Change
Employee Name: Sample Employee
EmpID: 000033
Reviewing and Changing Your Emergency Contact Information

Reviewing Your Existing Contacts

2. Click on Personal Information Home to go to the Personal Information Home page.
   • NOTE: You can also select Self Service, Employee, Home, Personal Information Home. The Personal Information Home page displays.

3. Click on Emergency Contacts under Emergency Contacts. The Emergency Contacts page displays.
   • NOTE: You can also select Self Service, Employee, Tasks, Emergency Contacts.

4. Review the existing contact information.

5. Click on the Contact Name. The Emergency Contact Detail page displays.
Changing an Existing Contact

1. Click on the Edit button. The Emergency Contact Detail page displays with the fields you can change active.

6. Click on Return to Emergency Contacts to go back to the Emergency Contacts page.
2. Enter the information in the fields as needed. 
   • **NOTE:** Fields marked with an * are required fields.

<table>
<thead>
<tr>
<th><strong>Address and Telephone</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Contact Name:</strong> Employee Spouse</td>
</tr>
<tr>
<td><strong>Relationship to Employee:</strong> Spouse</td>
</tr>
<tr>
<td><strong>Contact has the same address as the employee</strong></td>
</tr>
<tr>
<td><strong>Contact has the same telephone number as the employee</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Address</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Country:</strong> United States</td>
</tr>
<tr>
<td><strong>Address:</strong> 1234 Self Service Lane Anywhere, GA 30999 PeopleSoft</td>
</tr>
</tbody>
</table>

3. Enter the information in the fields as needed. 
   • **NOTE:** Fields marked with an * are required fields.

<table>
<thead>
<tr>
<th><strong>Employee's Phone</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Phone:</strong> 708/555-9873</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Other Telephone Numbers</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Phone Type</strong></td>
</tr>
<tr>
<td>Business</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

4. Click on **Save** The **Save Confirmation** page displays.

<table>
<thead>
<tr>
<th><strong>Save Confirmation</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The Save was successful.</strong></td>
</tr>
</tbody>
</table>

5. Verify ✔ The **Save was successful.** appears.
6. Click on \[ \text{OK} \] This brings you back to the \textbf{Emergency Contacts} page.

**Deleting an Existing Contact**

1. Click on \[ \text{Delete} \] The \textbf{Delete Confirmation} page displays.
   - \textbf{NOTE:} You cannot delete a Primary Contact unless you designate a new Primary Contact first.

   ![Delete Confirmation](image)

2. Verify \[ \text{Are you sure you want to delete Emergency Contact (Daughter Employee)?} \] appears.

3. Click on \[ \text{Yes - Delete} \] to delete the contact, or \[ \text{No - Do Not Delete} \] to cancel the deletion. This brings you back to the \textbf{Emergency Contacts} page.

4. Verify the contact has been deleted.

**Changing Your Primary Contact**

1. Click on \[ \text{Change the primary contact} \] The \textbf{Change Primary Contact} page displays.

   ![Change Primary Contact](image)

2. Click on the \[ \text{Primary Contact} \] and select a new \textbf{Primary Contact} from the drop-down list.

3. Click on \[ \text{Save} \] The \textbf{Save Confirmation} page displays.

4. Verify \[ \text{The Save was successful.} \] appears.
5. Click on [OK]. This brings you back to the Emergency Contacts page.

Adding a New Emergency Contact

1. Click on [Add an Emergency Contact]. The Emergency Contact Detail page displays.

2. Enter the Contact Name in the Address and Telephone section.
   - NOTE 1: Fields marked with an * are required fields.
   - NOTE 2: You can enter the name in First Name Last Name format.

3. Click on the and select the Relationship to Employee from the drop-down list.

4. Click the appropriate check boxes ON if the contact has the same address and telephone number as the employee.

5. Click on Edit Address in the Address section if the contact has a different address from the employee. The Edit Address page displays.
6. Enter the information in the fields as needed.

- **NOTE 1:** Click on **Address Format Instructions** for instructions on how to format information in the fields on this page. Click on **OK** to return to the Edit Home Address page.

```
<table>
<thead>
<tr>
<th>Zip Codes</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Five (5) digits without punctuation.</td>
<td>12345</td>
</tr>
<tr>
<td>Nine (9) digits with a hyphen between the 5th and 6th digit.</td>
<td>12345-6789</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Street Abbreviations</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Street addresses should include abbreviated street suffixes.</td>
<td>St, Dr, Blvd</td>
</tr>
<tr>
<td>No periods after street abbreviations.</td>
<td>Rd, Ln, Hwy</td>
</tr>
<tr>
<td>No periods after directional indicators.</td>
<td>NE, SW, SE</td>
</tr>
<tr>
<td>No pound sign (#) to designate apartment or suite numbers.</td>
<td>Apt 12</td>
</tr>
<tr>
<td>Use 'Ap' or 'St' to designate apartments or suites.</td>
<td>12 instead of Apt 12</td>
</tr>
<tr>
<td>Do not allow solitary numbers for apartment numbers.</td>
<td></td>
</tr>
</tbody>
</table>
```

- **NOTE 2:** There is a 32-character limit in the Address 1 and Address 2 fields. You will receive the following error message if you exceed 32 characters:
  - **Address 1/Address 2 cannot exceed 32 characters. Please remove X characters.**

7. Click on **OK** to return to the Emergency Contact Detail page.

```
Phone

Telephone: 

Other Telephone Numbers

<table>
<thead>
<tr>
<th>*Phone Type</th>
<th>Phone Number</th>
</tr>
</thead>
</table>

Add a Phone Number

* Required Field

Save

Return to Emergency Contacts
```

8. Enter the **Telephone** number in the **Phone** section.
9. Enter any additional Phone Type and Phone Number information in the Other Telephone Numbers section by clicking on Add a Phone Number.
   • NOTE: Fields marked with an * are required fields.

10. Click on Save. The Emergency Contacts Save Confirmation page displays.
    • NOTE: Incomplete addresses will not be saved.

11. Verify ✓ The Save was successful. appears.

12. Click on OK. This brings you back to the Emergency Contacts page.

13. Verify the new emergency contact information.
Changing Your Home or Mailing Address

Reviewing Your Address Information


2. Click on Personal Information Home to go to the Personal Information Home page.
   - NOTE: You can also select Self Service, Employee, Home, Personal Information Home. The Personal Information Home page displays.

3. Click on Home/Mailing Addresses in the Contact Information section. The Home and Mailing Address page displays.
   - NOTE: You can also select Self Service, Employee, Tasks, Home and Mailing Address.

![Home and Mailing Address Table]

4. Review the information in the Addresses section.

Changing Your Address Information

1. Click on Edit for the address you wish to change. The appropriate Edit Address page displays.

![Edit Home Address Form]

2. Enter the new address information in the fields as needed.
- **NOTE 1:** You can only enter an address change date that is on or after today’s date.
- **NOTE 2:** Click on **Address Format Instructions** for instructions on how to format information in the fields on this page.

<table>
<thead>
<tr>
<th>Zip Codes</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Five (5) digits with no punctuation.</td>
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<tr>
<td>Nine (9) digits with a hyphen between the 5th and 6th digit.</td>
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<td>Rd, Ln, Hwy</td>
</tr>
<tr>
<td>No periods after directional indicators.</td>
<td>NE, SW, S, E</td>
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<tr>
<td>No pound sign (#) to designate apartment or suite numbers.</td>
<td>Apt 12</td>
</tr>
<tr>
<td>Use 'ap't' or 'a'lt' to designate apartments or suites.</td>
<td>Apt 12 instead of Apt 12</td>
</tr>
<tr>
<td>Do not allow solitary numbers for apartment numbers.</td>
<td></td>
</tr>
</tbody>
</table>

- **NOTE 3:** There is a 32-character limit in the Address 1 and Address 2 fields. You will receive the following error message:
  - **Address 1/Address 2 cannot exceed 32 characters. Please remove X characters.**

  - Click on **OK** to return to the **Edit Home Address** page.

3. Enter the date the new address will take effect in the **Date Change Will Take Effect** in the **On this date** field.

4. Click on **Save**. The **Home and Mailing Address Change Save Confirmation** page displays.
  - **NOTE:** Incomplete addresses will **not** be saved.

5. Verify ✔️ The **Save was successful.** appears.

6. Click on **OK**. This brings you back to the **Home and Mailing Address** page.

7. Verify the address information in the **Addresses** group box.

**Adding a New Mailing Address**

You are allowed two addresses: a **Home** address and a **Mailing** address. Your **Home** address comes from the data that was entered during your **Hire** process. If you have a mailing address that is different from your **Home** address, you can enter that address on the **Home and Mailing Address** page.
1. Click on the and select Mail from the Address Type drop-down list.
   • NOTE: Fields marked with an * are required fields.

2. Click on Add. The appropriate Add Mailing Address page displays.

3. Enter the new address information in the fields as needed.
   • NOTE 1: Click on Address Format Instructions for instructions on how to format information in the fields on this page.
• **NOTE 2:** There is a 32-character limit in the Address 1 and Address 2 fields. You will receive the following error message if you exceed 32 characters:
  • **Address 1/Address 2 cannot exceed 32 characters. Please remove X characters.**

  • Click on **OK** to return to the **Edit Home Address** page.

4. Enter the **Date Change Will Take Effect** in the **On this date** field.

5. Click on **Save**. The **Home and Mailing Address Save Confirmation** page displays.
  • **NOTE:** Incomplete addresses will **not** be saved.

6. Verify ✔️ The **Save was successful** appears.

7. Click on **OK**. This brings you back to the **Home and Mailing Address** page.

8. Verify the address information in the **Addresses** group box.
Reviewing and Changing Your Phone Number

Reviewing Your Phone Number Information
2. Click on Personal Information Home to go to the Personal Information Home page.
   • NOTE: You can also select Self Service, Employee, Home, Personal Information Home. The Personal Information Home page displays.
3. Click on Phone Numbers under Phone Numbers. The Phone Numbers page displays.
   • NOTE: You can also select Self Service, Employee, Tasks, Phone Numbers.

4. Review the Phone Type and Telephone information.

Changing an Existing Phone Number
1. Change the Phone Type and Telephone information as needed.
   • NOTE 1: Fields marked with an * are required fields.
   • NOTE 2: Telephone numbers must be 10 digits with no letters, and should be entered in the following format: xxxxxxxxxx (Example: 7065551111). You will receive the following error message if you enter an incorrectly formatted telephone number:
     • Please enter phone number in the format of: xxxxxxxxxx (ex. 7065551111).
2. Click on Save. The Save Confirmation page displays.
3. Verify The Save was successful. appears.
4. Click on OK. This brings you back to the Phone Numbers page.

Deleting an Existing Phone Number
1. Click on Delete for the phone number you wish to delete. The Delete Confirmation
page displays.

**Phone Numbers**

**Delete Confirmation**

? Are you sure you want to delete Phone Number (Main)?

Yes - Delete  No - Do Not Delete

2. Verify ? Are you sure you want to delete Phone Number (Main)? appears.

3. Click on Yes - Delete to delete the contact, or No - Do Not Delete to cancel the deletion. This brings you back to the Phone Numbers page.

4. Verify the phone number is deleted.

**Adding a New Phone Number**

1. Click on Add a Phone Number. A new blank row displays.
   • **NOTE:** Fields marked with an * are required fields.

2. Enter or select the Phone Type.

3. Enter the Telephone information.
   • **NOTE:** Telephone numbers must be 10 digits with no letters, and should be entered in the following format: xxxxxxxxxx (Example: 7065551111). You will receive the following error message if you enter an incorrectly formatted telephone number:
     • Please enter phone number in the format of: xxxxxxxxxx (ex. 7065551111).

4. Click on Save. The Phone Numbers Save Confirmation page displays.

5. Verify ✓ The Save was successful. appears.

6. Click on OK. This brings you back to the Phone Numbers page.

7. Verify the telephone information.
Your Benefits Information

Reviewing Your Benefits Summary


2. Click on Benefits Home to go to the Benefits Home page.
   - NOTE: You can also select Self Service, Employee, Home, Benefits Home. The Benefits Home page displays.

3. Click on Benefits Summary in the Benefits Information section. The Benefits Summary page displays.
   - NOTE: You can also select Self Service, Employee, View, Benefits Summary.
4. Review your Benefits Summary information.
   • This is a listing of your benefits as of today’s date.
   • If you would like to see a Benefits Summary for another date, enter that date (MM/DD/YYYY) and click on Go.
   • If you would like to see a listing of the current benefits rates for eligible benefit plans, click on Current Medical/Dental Rates. A new page displays with a listing of these rates. Click on Return to return to the Benefits Summary page.
5. Click on the individual links (Medical, etc.) to display a separate page containing more detailed information for each enrolled Benefit.

6. Click on Return to Employee Benefit Summary to return to the Benefits Summary page.
Reviewing Your Flexible Spending Accounts


2. Click on Benefits Home to go to the Benefits Home page.
   - NOTE: You can also select Self Service, Employee, Home, Benefits Home. The Benefits Home page displays.

3. Click on Flexible Spending Accounts in the Flexible Spending Accounts section. The Flexible Spending Accounts page displays.

4. Review your Flexible Spending Account information.
   - This is a listing of your accounts for the current calendar year. Your annual pledge amount(s) and the year-to-date amount(s) contributed are shown here.
   - If you would like to review the Flexible Spending Accounts for another calendar year, enter that year (YYYY) and click on Go.

5. Click on one of the Go to links to return to the appropriate page.
**Reviewing and Changing Your Dependent Information**

**Reviewing Dependent Personal Information**

1. Select **Self Service, Employee, Home, Employee Home**. The Employee Home page displays.

2. Click on **Benefits Home** to go to the Benefits Home page.
   - **NOTE:** You can also select **Self Service, Employee, Home, Benefits Home**. The Benefits Home page displays.

3. Click on **Dependent Personal Information** in the **Dependent Information** section. The Dependent Summary page displays.
   - **NOTE:** You can also select **Self Service, Employee, Tasks, Dependent Summary**.

```
<table>
<thead>
<tr>
<th>Dependent Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click the Dependent's name if you would like to review or change personal information.</td>
</tr>
</tbody>
</table>

**Summary**

- **Spouse Employee**
  - Address: 1234 Self Service Lane
  - Relationship to Employee: Spouse
  - Date of Birth: 01/01/1964
  - City: Anywhere
  - State: GA
  - Country: United States
  - Zip Code: 30000
  - Telephone: 708/555-7890

- **View details**
```

4. Review the Summary information for each dependent.
   - **NOTE:** For security reasons, the Social Security number is not shown. You can see this number by placing your mouse/cursor over **View details** and the number will be shown in a hover-text box.

5. Click on the **Dependent Name** to review the dependent information. The **Dependent Personal Information** page displays.
6. Review the Dependent Personal Information in these sections:
   - **Personal Information**
   - **Status Information**

7. Review the Dependent Personal Information in these sections:
   - **Address and Telephone**
   - **Address**
   - **Address**
8. Click on **Return to Dependent Summary** to return to the **Dependent Summary** page.

**Changing Dependent Personal Information**

**NOTE:** Only employees can change their dependent contact information.

1. Click on **Edit**. The **Dependent Personal Information** page displays with the fields that you can change active.
   - **NOTE:** You cannot change any of the dependent Personal Information fields here. These fields may be updated through your HR/Benefits department.

   ![Dependent Personal Information](image)

   Click **Save** once you have edited your dependent's personal information.
2. Enter or change the information in the **Address and Telephone** and **Address** fields as needed.
   - **NOTE:** Only employees can change their dependent contact information.
   - **Same Address as Employee** check box
   - **Same Phone as Employee** check box
   - **Country**
     - **NOTE:** Click on **Change Country** to display a new page where you can select the appropriate country. Click on the **Country** to select it and return to the **Dependent Personal Information** page.
   - **Address** (Click on **Edit Address** as noted in Step 3 below.)
   - **Phone**
     - **NOTE:** Fields marked with an * are required fields.

3. Click on **Edit Address**. The **Edit Address** page displays.
4. Enter or change the information in the **Edit Address** fields as needed.
   - **NOTE 1:** Only employees can change their dependent contact information.
   - **NOTE 2:** Click on **Address Format Instructions** for instructions on how to format information in the fields on this page.

5. Click on **OK**. This brings you back to the **Dependent Personal Information** page.

6. Enter or change the information in the **Address** field as needed.
   - **NOTE:** Fields marked with an * are required fields.

7. Click on **Save**. The **Save Confirmation** page displays.
   - **NOTE:** Incomplete addresses will not be saved.
8. Verify ✓ The Save was successful. appears.

9. Click on OK. This brings you back to the **Dependent Personal Information** page.

10. Verify the dependent information.

11. Click on **Return to Dependent Summary**. This brings you back to the **Dependent Summary** page.

12. Click on **Benefits Home**. This brings you back to the **Benefits Home** page.
   - **NOTE:** You can also click on **Dependent Coverage Summary** to go directly to the **Dependent Coverage Summary** page.

**Reviewing Dependent Coverage Information**

1. Click on **Dependent Coverage Summary** in the **Dependent Information** section. The **Dependent Coverage Summary** page displays.
   - **NOTE:** You can also select **Self Service, Employee, View, Dependent Coverage**.

<table>
<thead>
<tr>
<th>Dependent Name</th>
<th>Relationship</th>
<th>Type of Benefit</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spouse Employee</td>
<td>Spouse</td>
<td>Medical</td>
<td>PPQ Before Tax</td>
</tr>
</tbody>
</table>

2. Review the Dependent Coverage Summary information. This page provides a list of your current dependents, their benefits coverage, and their contact information as of today’s date.
   - If you would like to see a Dependent Coverage Summary for another date, enter that date (MM/DD/YYYY) and click on **Go**.

3. Click one of the **links** to go to the appropriate page.
Your Payroll and Compensation Information

Reviewing and Printing Your Paycheck

NOTE: Your Payroll office will no longer print and send your paycheck advice to you. You can review your advice and print a hard copy using Employee Self Service.


2. Click on Payroll and Compensation Home to go to the Payroll and Compensation Home page.
   • NOTE: You can also select Self Service, Employee, Home, Payroll and Compensation Home. The Payroll and Compensation Home page displays.
3. Click on View Paycheck in the Payroll section. The View Paycheck page displays with your current paycheck information.
   • NOTE: You can also select Self Service, Employee, View, View Paycheck.

4. Review your current paycheck information.
   • NOTE: If you want to review the information for a different paycheck, you can click on View a Different Payment. The View Paycheck page displays with a Pay Check.
Selection list of paychecks sorted by Pay Period End Date. Click on the appropriate Pay Period End Date (MM/DD/YYYY) to review the information for that paycheck.

5. Click on [Print-Friendly Paycheck]. Your paycheck displays in a printer-friendly format.

6. Click on [Print] in your browser’s toolbar. Your paycheck prints at your default printer.
Reviewing and Changing Your Direct Deposit

Reviewing Your Direct Deposit Information


2. Click on Payroll and Compensation Home to go to the Payroll and Compensation Home page.
   - NOTE: You can also select Self Service, Employee, Home, Payroll and Compensation Home. The Payroll and Compensation Home page displays.

3. Click on Direct Deposit in the Payroll section. The Direct Deposit page displays with your current direct deposit information.
   - NOTE: You can also select Self Service, Employee, Tasks, Direct Deposit.

4. Click on the Account Type link (Savings, etc.) to review the details of each account on the Direct Deposit Detail page.
5. Click on Return to Direct Deposit to return to the Direct Deposit page.

Changing Your Direct Deposit

1. Click on Edit for the appropriate account. The Change Direct Deposit page displays.
   - NOTE 1: You MUST have an account row with a Deposit Type of Balance in order to make any changes to your Direct Deposit information. If a Balance row does not exist, you will have to add one. The Balance row can be edited to reflect new account information, but cannot be deleted.
   - NOTE 2: The Balance row identifies where any remaining funds from a paycheck should be deposited after funds are disbursed to all other Direct Deposit accounts/rows. The Balance row may be a duplicate of one of the other Direct Deposit rows. However, it operates independently of the other rows, and is not automatically updated when a change is made to another Direct Deposit row.
   - NOTE 3: The link to your Travel and Expense information will not be available until you verify your Direct Deposit Balance Account information. Once you do that and log out, then log back into Self Service, the Travel and Expense Home link will be available, as noted on page 8. Please refer to Your Travel and Expense Information, starting on page 78, for more information on enabling the T&E Home Pagelet and accessing your Travel and Expense information.

2. Make the necessary changes to your information.
   - NOTE: Fields marked with an * are required fields.

3. Click on View check example to locate where the Routing Number and/or Account Number are on your personal checks, if you are changing the numbers in these fields. Do not use a deposit slip or credit card convenience check! Click on OK to return to the Change Direct Deposit page.
4. Click on **Direct Deposit Help** for more information. Click on **OK** to return to the **Change Direct Deposit** page.

5. Click on **Save** when you have completed your changes. The **Direct Deposit Save Confirmation** page displays.
6. Verify ✓ The Save was successful. appears.
   • NOTE: This message will also include the following:
     • Please note that due to timing, your change may not be reflected on the next paycheck.
     • If you changed your direct deposit account information and are eligible for expense reimbursement, please verify your Accounts Payable direct deposit information with the Accounting Department.

7. Click on [OK]. This brings you back to the Change Direct Deposit page.

8. Click on Return to Direct Deposit to return to the Direct Deposit page.

Deleting Your Direct Deposit

1. Click on [Delete] to delete the appropriate account. The Delete Confirmation page displays.
   • NOTE: The Balance row can be edited to reflect new account information, but cannot be deleted.

2. Verify that ? Are you sure you want to delete this Deposit Account: 3333333333? appears.

3. Click [Yes - Delete] to delete the account or [No - Do Not Delete] to cancel the deletion. This will bring you back to the Direct Deposit page.

4. Verify the account is deleted.

Adding a New Direct Deposit Account

1. Click on [Add Account]. The Add Direct Deposit page displays.
2. Enter information in the fields as needed.
   - **NOTE:** Fields marked with an * are required fields.
3. Click on **Direct Deposit Help** for more information. Click on **OK** to return to the **Change Direct Deposit** page.

### Step One for Direct Deposit Updates:

Verify that a Deposit Type of "Balance" exists in your list of account rows. If a Balance row does not exist, you must add one before you can continue.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Type</td>
<td>Select whether this is a 'Checking' or a 'Savings' account.</td>
</tr>
<tr>
<td>Deposit Type</td>
<td>Choose &quot;Amount&quot; if you want to select a Dollar Amount.</td>
</tr>
<tr>
<td></td>
<td>Choose &quot;Percent&quot; if you want to select a percentage of the remaining net pay.</td>
</tr>
<tr>
<td></td>
<td>Choose &quot;Balance&quot; if you want to select the balance of the remaining net pay.</td>
</tr>
<tr>
<td>Amount/Percent</td>
<td>If you selected Deposit Type = Amount, enter a Dollar amount here.</td>
</tr>
<tr>
<td></td>
<td>If you selected Deposit Type = Percentage, enter a percentage here.</td>
</tr>
<tr>
<td></td>
<td>If you selected Deposit Type = Balance, leave this field blank.</td>
</tr>
<tr>
<td>Routing Number and Account Number</td>
<td>If you are entering a Checking Account, locate a copy of one of your personal checks for the account you want the above amount or percent to go to. Then, select the &quot;View Check Example&quot; link for additional information. DO NOT USE A DEPOSIT SLIP OR CREDIT CARD CONVENIENCE CHECKS. For Savings Accounts, please contact your bank for correct Routing and Account Number information.</td>
</tr>
<tr>
<td>Deposit Order</td>
<td>The Direct Deposit feature will process the lowest Deposit first. So, 100 will be processed before 200, etc.</td>
</tr>
</tbody>
</table>
4. Click on View check example to locate where the Routing Number and Account Number are on your personal checks. Do not use a deposit slip or credit card convenience check! Click on OK to return to the Change Direct Deposit page.

Check Example (Do Not Use a Deposit Slip or Credit Card Convenience Checks)

5. Click on Save. The Direct Deposit Save Confirmation page displays.

6. Verify The Save was successful. appears.

7. Click on OK. This brings you back to the Direct Deposit page.

8. Verify the Direct Deposit Detail information for the new account.
Reviewing, Adding, Changing or Discontinuing Your Voluntary Deductions

Reviewing Your Voluntary Deduction Information


2. Click on Payroll and Compensation Home to go to the Payroll and Compensation Home page.
   - NOTE: You can also select Self Service, Employee, Home, Payroll and Compensation Home. The Payroll and Compensation Home page displays.

3. Click on Voluntary Deductions in the Payroll section. The Voluntary Deductions page displays with your current voluntary deduction information.
   - NOTE: You can also select Self Service, Employee, Tasks, Voluntary Deductions.

4. Click on the Deduction Type link (State Charitable Deduction, etc.) to review the details of each account on the Voluntary Deductions Details page.

   - Click on Return to Voluntary Deductions to return to the Voluntary Deductions page.
Changing or Discontinuing Your Voluntary Deductions

1. Click on **Edit** for the appropriate deduction. The **Change Voluntary Deduction** page displays.

   ![Voluntary Deductions](image)

   **Change Voluntary Deduction**
   
   Sample Employee  
   Board of Regents  
   
   *Type of Deduction:*  
   
   *Check whether Deduction is a Flat Amount or Percent:*
   
   *Enter Amount/Percent to be deducted:*
   
   Take deduction until I reach this Goal Amount:
   
   *Enter Deduction Start Date:*
   
   Enter Deduction Stop Date:
   
   Current Balance:
   
   ![Save](image)

2. Enter the information in the fields as needed.
   
   • **NOTE:** Fields marked with an * are required fields.

3. Click on **Save**. The **Voluntary Deductions Save Confirmation** page displays.

4. Verify ✔️ The Save was successful. appears.

5. Click on **OK**. This brings you back to the **Change Voluntary Deduction** page.

Adding a New Voluntary Deduction

1. Click on **Add Deduction**. The **Add Voluntary Deduction** page displays.
2. Enter or select the information in the fields as needed.
   - **NOTE 1:** Fields marked with an * are required fields.
   - **NOTE 2:** If the drop-down list for the **Type of Deduction** field is empty (no matching values), your institution has elected not to participate in the Voluntary Deduction feature.

3. Click on **Save**. The **Voluntary Deductions Save Confirmation** page displays.

4. Verify ✓ The Save was successful. appears.

5. Click on **OK**. This brings you back to the **Voluntary Deductions** page.

6. Verify the **Voluntary Deductions** information for the new deduction.
Reviewing or Changing Your Federal Tax Withholding (W-4) Information

Reviewing Your Federal Tax Withholding (W-4) Information


2. Click on Payroll and Compensation Home to go to the Payroll and Compensation Home page.
   • NOTE: You can also select Self Service, Employee, Home, Payroll and Compensation Home. The Payroll and Compensation Home page displays.

3. Click on W-4 Tax Information in the Taxes section. The W-4 Tax Information page displays.
   • NOTE 1: You can also select Self Service, Employee, Tasks, W-4 Tax Information.
   • NOTE 2: If you are a Non-Resident Alien, you will receive the following message:

   ![Image](image1.png)
   • Click on [OK] to continue.
   • NOTE 3: If you are a Retiree, you will receive the following message:

   ![Image](image2.png)
   • Click on [OK] to continue.
W-4 Tax Information

Sample Employee
Board of Regents

Social Security #: [View details]

You must complete Form W-4 so the Payroll Department can calculate the correct amount of tax to withhold from your pay. Federal income tax is withheld from your wages based on marital status and the number of allowances claimed on this form. You may also specify that an additional dollar amount be withheld. You can file a new Form W-4 anytime your tax situation changes and you choose to have more, or less, tax withheld.

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

You may also choose to file a new G-4 to modify the amount of state income tax that is withheld if your tax situation changes. The Form G-4 cannot be updated on-line at this time. Please click the G-4 Tax Form link at the bottom of this page and print the form. Return the completed form to your HR department to modify your state withholdings. To view your current G-4 allowances, please view your latest paycheck.

Home Address

1234 Self Service Lane
Anywhere GA 30999

Mailing Address

1234 Self Service Ave
Anywhere GA 30999

4. Review the following information on this page.

- General
  - NOTE: For security reasons, your Social Security number is not shown. You can see this number by mousing over [View details] and the number will be shown in a hover-text box.
- Home Address
- Mailing Address
5. Review the following information on this page:
   - **W-4 Tax Data**
   - **Claim Exemption**

### Changing Your Federal Tax Withholding (W-4) Information

1. Enter or select the appropriate information in the fields in the **W-4 Tax Data** and/or **Claim Exception** sections as needed.
   - **NOTE:** Fields marked with an * are required fields.

2. Click on **Submit**. The **Verify Identity** page displays.

**Verify Identity**

To protect your privacy, verify your identity by typing your password. If you are not this user, click **Sign Out**.

- **User ID:** SAMPLE_EMPLOYEE
- **Password:** 

[Continue]  [Cancel]

- **NOTE:** If you claim a number of exemptions that is higher than that allowed by the IRS because of a tax levy or lien, you will receive the following message:
• Click on OK to continue.

3. Enter your Password in the Password field.

4. Click on Continue. This brings you to the Submit Confirmation page.

Submit Confirmation

✓ The Submit was successful.

It is your responsibility to review your next pay check to ensure that your employee tax changes have been recorded properly.

OK

5. Verify ✓ The Submit was successful. appears.

• NOTE: If your Payroll office is currently processing a payroll, you will receive the following message:

Warning -- This change will not be processed until the next payroll.
This change will not be processed until the next payroll.

OK Cancel

Your change will not be processed in the payroll that is currently being processed, but will be processed in the next payroll. Click on OK to submit your change, or Cancel if you prefer to submit your change at a later date.

6. Click on OK. This brings you back to the W-4 Tax Information page.

• NOTE: You will receive an email at your Primary email address confirming that your request was submitted. If you do not receive an email, please verify your Primary email address in My System Profile, as discussed in Editing Your Email Addresses on page 22 of this document.
Employee: 000002

Sample Employee

You submitted W-4 data via the Web on 2007-11-02.

Marital Status: Single or Married, but withhold at higher Single rate

No. of Allowances: 1

Additional Amount: 0

Exempt Status: N

Employer:
Requesting Duplicate W-2 Forms


2. Click on Payroll and Compensation Home to go to the Payroll and Compensation Home page.
   • NOTE: You can also select Self Service, Employee, Home, Payroll and Compensation Home. The Payroll and Compensation Home page displays.

3. Click on W-2 Reissue Request in the Taxes section. The W-2 Reissue Request page displays.
   • NOTE: You can also select Self Service, Employee, Tasks, W-2 Reissue Request.

4. Review your current Home Address and Mailing Address information.

5. Enter the calendar year (YYYY) in the W2 Request for year field.

6. Select where you want your W-2 delivered from the drop-down list.

7. Click on Submit. The Submit Confirmation page displays.
8. Verify ✓ The Submit was successful appears.

9. Click on OK This brings you back to the W-2 Reissue Request page.
Your Leave Balance Information

Reviewing Your Leave Balances

1. Select Self Service, Employee, Home, **Employee Home**. The **Employee Home** page displays.

   ![Employee Home Menu](image)

   - **Employee Home**
     - **Personal Information Home**
       - Review and edit your contact information, including name and marital status changes.
     - **Benefits Home**
       - Review health, life insurance, flexible spending accounts, or other benefit information.
       - Review dependent information.
     - **Payroll and Compensation Home**
       - Access your pay stub, direct deposit, and other deduction or contribution information.
     - **My Leave Balances**
       - Review vacation, sick, and other leave balances.
     - **Travel and Expense Home**
       - View, submit, and retrieve travel authorizations, expense reports, and cash advance requests.
     - **Setup Expense Reimbursement Options**
       - Review and update expense reimbursement address and payment information.
       - Activate access to Travel and Expense Home.

2. Click on **My Leave Balances** to go to the **My Leave Balances** page.
   - **NOTE**: You can also select Self Service, Employee, Home, **My Leave Balances**. The **My Leave Balances** page displays.

   ![My Leave Balances Menu](image)

   - **My Leave Balances**
     - **Sample Employee**

   ![My Leave Balances Table](image)

   - **NOTE**: This page will display your Leave Balances for all the Leave Plans in which you are enrolled. It also contains a Glossary of Terms to explain the information on this page.
3. Click on the **Plan Type** (Sick, Vacation, etc.) link to review the balance for the specific Leave Plan. The **My Leave Balance Detail** page displays.

- **NOTE:** This page will display a 12-month history for the selected Leave Plan. It also contains a Glossary of Terms to explain the information on this page.
4. Click on the **Return to Leave Balances** link to return to the **Your Leave Balances** page. There you can select another Leave Plan to review that balance.

5. Click on the **Employee Home** link to return to the **Employee Home** page.

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**GLOSSARY OF TERMS**

BEGINNING BALANCE - is the total number of hours in your account at the beginning of the calendar year.

YTD HOURS EARNED - is the total number of hours that have been credited to your account since the beginning of the calendar year. Hours are credited for all employees at the end of the month.

YTD HOURS TAKEN - is the total number of hours that have been charged to your account since the beginning of the calendar year. This process occurs every pay period for the pay type.

YTD HOURS ADJUSTED - is the total number of hours that are the result of adjustments to your activity. A typical adjustment might involve leave entered as vacation that should have been entered as sick leave.

CURRENT BALANCE - is a sub-total of the number of hours available for use.
Your Travel and Expense Information

Setting Up Your Expense Reimbursement Options
The link to your Travel and Expense information will not be available until you enable the T&E Home pagelet, which you do by clicking on the Setup Expense Reimbursement Options link and verifying your Address and Direct Deposit Balance Account information. Once you do that and log out, then log back into Self Service, the Travel and Expense link will be available.


2. Click on Setup Expense Reimbursement Options to go to the Setup Expense Reimbursement Options page.
   • NOTE: This page will display your Address and Direct Deposit Balance Account information.
3. Follow the steps shown in EX.010.011 - Enabling the T&E Home Pagelet to make the Travel and Expense link available on your **Employee Home** page.
   - Click [here](#) to access the UPK Player for this activity. An **Enter Network Password** dialog box displays.
   - **NOTE 1:** The User Productivity Kit (UPK) Player is a browser-based training tool that provides a step-by-step recording of the instructions and actions for transactions within PeopleSoft Financials. It offers multiple modes of use to provide simulated instruction and reinforcement of learning to a PeopleSoft end user.
   - **NOTE 2:** You must use Internet Explorer 6.0 or greater to access the UPK Players.
Enter the following:
- User Name: `bor_upk`
- Password: `upkuser!`

Click on **OK**. The UPK Players for Expenses and eProcurement End Users page displays.

Click on **Employee Setup and Maintenance** under **Travel & Expenses**. The UPK Player for the Travel & Expenses (EU) – Employee Setup and Maintenance chapter displays.
• Click on the to expand the **Travel & Expenses (EU) – Employee Setup and Maintenance** chapter. The **HR/EX Self Service Setup and Preferences** lesson displays.

• Click on the to expand the **HR/EX Self Service Setup and Preferences** lesson. The UPK Players for the **HR/EX Self Service Setup and Preferences** topics display.

• Select **EX.010.011 - Enabling the T&E Home Pagelet**. Information on this topic displays in the **Concept** and **Introduction** panes, and the **Playback Mode** options become active.
• Select **See It!** or **Try It!** as the Playback Mode. The UPK Player starts and you can review the steps you need to perform to enable the T&E Home pagelet.

• **NOTE:** In **See It!** mode, the recording plays and you watch the recording as it progresses. In **Try It!** mode, the recording plays but you have to click on the appropriate button or enter the appropriate information for the recording to resume.

4. Log out of Self Service once you have completed the steps shown in EX.010.011.

5. Log back in to Self Service.

6. Select **Self Service, Employee, Home, Employee Home.** The **Employee Home** page displays.

Note that the **Travel and Expense Home** link is now available, as shown above.
Entering, Submitting, and Reviewing Travel and Expenses Information

1. Click on Travel and Expense Home. The Travel and Expense Home page displays.
   - NOTE: You can also select Self Service, Employee, Home, Travel and Expense Home. The Travel and Expense Home page displays.

   ![Image of Travel and Expense Home page]

   NOTE: With the addition of the new Travel and Expense functionality, which uses PeopleSoft Financials as well as HRMS, a separate My System Profile was added to PeopleSoft Financials as well. Please note the following:
   - Passwords in both Financials and HRMS will be in sync between the two systems.
   - Password help will not work in Financials. You must use this in HRMS.
   - The email address you add in HRMS Self Service will sync to Financials. However, if you add a different email address in Financials, it will **not** sync back to HRMS.

You can click [here](#) and follow the steps on pages 79-82 to access the UPK Player for the EX.010.013, Reviewing My System Profile (Self Service) topic.

2. Click on Employee Self-Service. The Employee Self-Service page displays.
• NOTE: You can also select **Employee Self-Service, Employee T&E Center.** The Employee Self-Service page displays.

From this page you can:
• View your personal, organizational, and financial details for travel and expense reporting.
• Review the history of your expense payments.
• Create, modify, print, view, or delete an Expense Report, a Travel Authorization, or a Cash Advance.

3. Click here to access the UPK Players for these activities:
• Follow the steps on pages 79 and 80 to display the **UPK Players for Expenses and eProcurement End Users** page.

![UPK Players for Expenses and eProcurement End Users](image)

• Click on **Travelers** under **Travel & Expenses.** The UPK Player for the Travel & Expenses (EU) – Travelers chapter displays.
• Click on the to expand the **Travel & Expenses (EU) – Travelers** chapter. The various lessons for Travelers activities display.
• Click on the to expand the appropriate lesson to display the UPK Players for the topics in that lesson.
Select the appropriate topic and the appropriate Playback Mode for the activity you want to review.