

Employee Self Service

HELP

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.

<u>Employee Self Service</u>	<u>3</u>
Registering for Employee Self Service.....	3
Logging into Employee Self Service.....	7
Forgotten your User ID?.....	9
Forgotten your Password?.....	10
<u>My System Profile</u>	<u>16</u>
Changing Your Password.....	18
Changing Your Personalizations.....	20
Editing Your Email Addresses.....	22
<u>Your Personal Information</u>	<u>24</u>
Reviewing Your Personal Information.....	24
Changing Your Marital Status.....	27
Changing Your Name.....	30
Reviewing and Changing Your Emergency Contact Information.....	33
Reviewing Your Existing Contacts.....	33
Changing an Existing Contact.....	34
Deleting an Existing Contact.....	36
Changing Your Primary Contact.....	36
Adding a New Emergency Contact.....	37
Changing Your Home or Mailing Address.....	40
Reviewing Your Address Information.....	40
Changing Your Address Information.....	40
Adding a New Mailing Address.....	41
Reviewing and Changing Your Phone Number.....	44
Reviewing Your Phone Number Information.....	44
Changing an Existing Phone Number.....	44
Deleting an Existing Phone Number.....	44
Adding a New Phone Number.....	45
<u>Your Benefits Information</u>	<u>46</u>
Reviewing Your Benefits Summary.....	46
Reviewing Your Flexible Spending Accounts.....	49
Reviewing and Changing Your Dependent Information.....	50
Reviewing Dependent Personal Information.....	50

Changing Dependent Personal Information.....	52
Reviewing Dependent Coverage Information	55
<u>Your Payroll and Compensation Information</u>	<u>56</u>
Reviewing and Printing Your Paycheck.....	56
Reviewing and Changing Your Direct Deposit	59
Reviewing Your Direct Deposit Information	59
Changing Your Direct Deposit	60
Deleting Your Direct Deposit	62
Adding a New Direct Deposit Account	62
Reviewing, Adding, Changing or Discontinuing Your Voluntary Deductions	65
Reviewing Your Voluntary Deduction Information	65
Changing or Discontinuing Your Voluntary Deductions	66
Adding a New Voluntary Deduction	66
Reviewing or Changing Your Federal Tax Withholding (W-4) Information.....	68
Reviewing Your Federal Tax Withholding (W-4) Information.....	68
Changing Your Federal Tax Withholding (W-4) Information	70
Requesting Duplicate W-2 Forms.....	73
<u>Your Leave Balance Information</u>	<u>75</u>
Reviewing Your Leave Balances.....	75
<u>Your Travel and Expense Information.....</u>	<u>78</u>
Setting Up Your Expense Reimbursement Options.....	78
Entering, Submitting, and Reviewing Travel and Expenses Information	83

Employee Self Service

Registering for Employee Self Service

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

Self Service

User ID:

Password:

[Forgot My Username or Password](#)

[Register For My Account](#)

Notice to Users of this Computer System

This is a University System of Georgia computer system. This computer system, including all related equipment, networks and network devices (including internet access), is provided only for authorized University System of Georgia use. Unauthorized use may subject you to criminal prosecution. All information, including personal information, placed on or sent over this system may be monitored. **Use of this system constitutes consent to these terms of usage.**

2. Click on [Register for My Account](#). The **Register for My Account** page displays.

[Sign out](#)

Board of Regents

[Help](#)

Register for My Account

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

To register for an account,
Please provide the following personal information:

Date of Birth (mm/dd/yyyy)	SSN (Last 4 digits)	Home Zip Code (5 digit)
<input type="text" value="01/01/1960"/>	<input type="text" value="9999"/>	<input type="text" value="30999"/>

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 . 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.

Register for My Account

<u>Employee Status</u>	<u>Name</u>	<u>Employee ID</u>
<input checked="" type="radio"/> Active	Employee, Sample B	000033

Select NEXT to continue.

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

an account.

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

Register for My Account

Enter a User ID. Your User ID is case sensitive and must be a minimum of 6 characters and a maximum of 30 characters and must not contain spaces. **User ID**

Enter and confirm your password. Your password is case sensitive and must be at least 8 characters and contain at least 2 numbers. No spaces or special characters are permitted. **Password**
Confirm Password

Enter and confirm your email address using the following format: jane.doe@usg.edu **Email Address**
Confirm Email

Select a Password Hint Question and provide a Response. This will be used to establish your identity in the event that you forget your password. **Hint Question**
Response

Select NEXT to continue.

- 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 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.
- Click on . The **Registration Complete** page displays.

Registration Complete

Congratulations, SAMPLE_EMPLOYEE!

You have successfully created a self service account for Employee, Sample B, Employee ID 000033. Click the Sign out link at the top of the page. This will return you to the login page where you may then log into your self service account.

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.

Self Service

User ID:

Password:

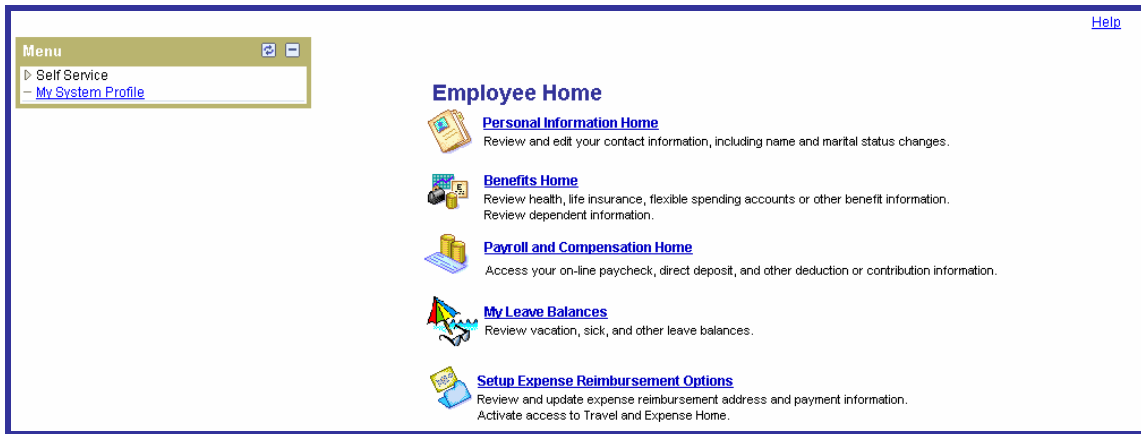
[Forgot My Username or Password](#)

[Register For My Account](#)

Notice to Users of this Computer System

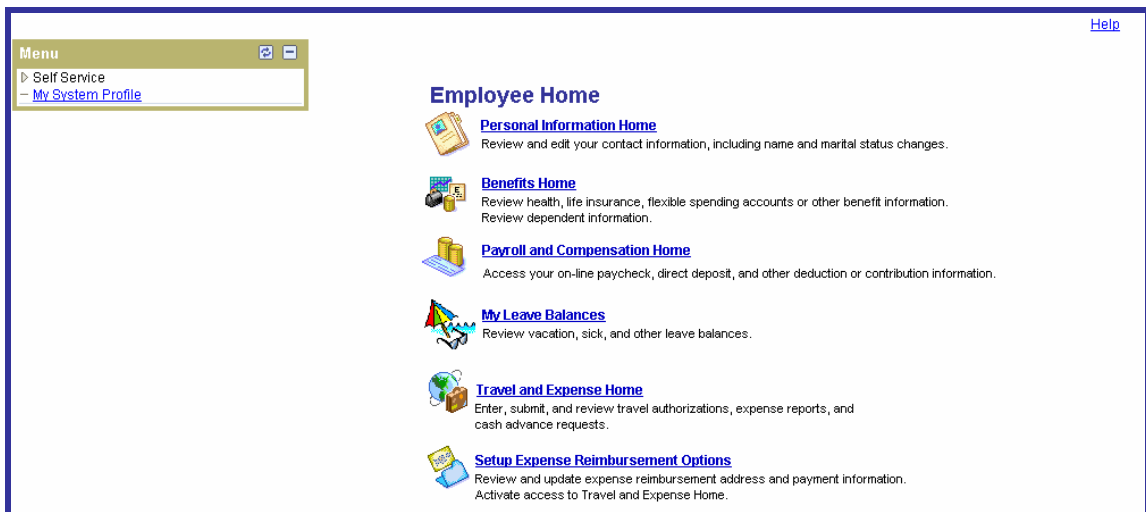
This is a University System of Georgia computer system. This computer system, including all related equipment, networks and network devices (including internet access), is provided only for authorized University System of Georgia use. Unauthorized use may subject you to criminal prosecution. All information, including personal information, placed on or sent over this system may be monitored. **Use of this system constitutes consent to these terms of usage.**

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 . 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

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)	SSN (Last 4 digits)	Home Zip Code (5 digit)	
<input type="text" value="01/01/1960"/>	<input type="text" value="9999"/>	<input type="text" value="3099"/>	<input type="button" value="Next"/>

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 . The **Forgot My User ID** page displays.

Forgot My User ID

Registered User Profiles:

<u>Employee Status</u>	<u>Name</u>	<u>User ID</u>
Active	Employee, Sample A	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.

Board of Regents [Sign out](#)

[Help](#)

Forgot User ID or Password

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. [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)	SSN (Last 4 digits)	Home Zip Code (5 digit)	Next
<input type="text"/>	<input type="text"/>	<input type="text"/>	

[Back](#)

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

Select NEXT to continue.

[Back](#) [Next](#)

3. Enter your **User ID** in the **User ID** field.
4. Click on . The **Change Password** page displays.

Change Password

The Password Hint Question that you selected when you registered User ID "SAMPLE_EMPLOYEE" is provided below. Please provide your response and click NEXT in order to proceed to the page to change your password.

Question Name of the High School you graduated from

Response

If you don't remember your response, please click "Email New Password" below. A temporary password will be emailed to you at the following email address: sample.employee@yahoo.com.

5. Enter the **answer to your Password Hint question** in the **Response** field.
6. Click on . A new **Change Password** page displays.

Change Password

Please enter and confirm your new password where indicated below, then click Change Password. Remember, your password must be at least 8 characters long and contain at least 2 numbers.

User ID SAMPLE_EMPLOYEE

Name Employee,Sample B

New Password

Confirm Password

7. Enter **your new password** in the **New Password** field.
8. Re-enter **your new password** in the **Confirm Password** field.
9. Click on . The **Change Password** page reappears.

Change Password

Please enter and confirm your new password where indicated below, then click Change Password. Remember, your password must be at least 8 characters long and contain at least 2 numbers.

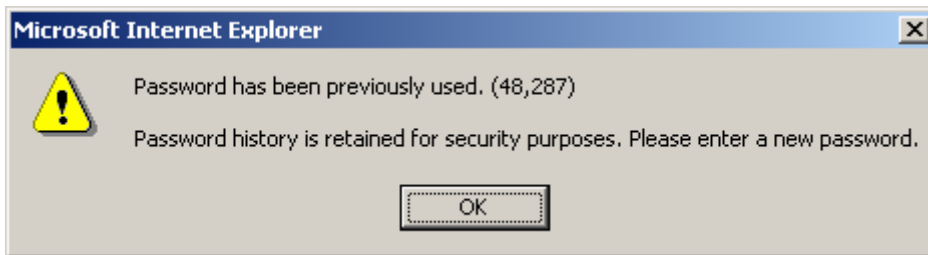
User ID SAMPLE_EMPLOYEE
Name Employee,Sample B

New Password

Confirm Password

Your password has successfully been changed. Click the [Sign Out](#) link at the top of the page and then log into your self service account.

NOTE: You cannot reuse a password. If you do, you will receive the following message:



Click on 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 . This takes you back to the **Change Password** page.

Change Password

The Password Hint Question that you selected when you registered User ID "SAMPLE_EMPLOYEE" is provided below. Please provide your response and click NEXT in order to proceed to the page to change your password.

Question Name of the High School you graduated from


Response

If you don't remember your response, please click "Email New Password" below. A temporary password will be emailed to you at the following email address: sample.employee@yahoo.com.

- Click on . A password will be sent to the e-mail address you entered in your **Register for My Account** page.

If you don't remember your response, please click "Email New Password" below. A temporary password will be emailed to you at the following email address: sample.employee@yahoo.com.

A temporary password for User ID SAMPLE_EMPLOYEE has been emailed to sample.employee@yahoo.com. When you receive your temporary password and log in, the password will expire and you will be prompted to create a new password. Please select the Sign Out link at the top of this page to return to the login page.

<p>Employee Self Service Information</p> <p>"noreply@usg.edu" <noreply@usg.edu>  Add</p> <p>To: sample.employee@yahoo.com</p>	<p>Standard Header ▾</p> <p>Friday, November 3, 2006 10:47:07 AM</p>
<p>PASSWORD LJF16MOU86</p>	

- 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.
- Click on [Sign out](#). This brings you to the **Employee Self Service Log In** page.

Self Service

User ID:

Password:

[Forgot My Username or Password](#)

[Register For My Account](#)

Notice to Users of this Computer System

This is a University System of Georgia computer system. This computer system, including all related equipment, networks and network devices (including internet access), is provided only for authorized University System of Georgia use. Unauthorized use may subject you to criminal prosecution. All information, including personal information, placed on or sent over this system may be monitored. **Use of this system constitutes consent to these terms of usage.**

4. Enter your **User ID** in the **User ID** field.
5. Enter the **system-generated password** in the **Password** field.
6. Click on . The following message displays.



7. Click on [Click here to change your password.](#) The **Change Password** page displays.

Change Password

User ID: SAMPLE_EMPLOYEE
Description: Employee, Sample B

*Current Password:

*New Password:

*Confirm Password:

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 . The **Password Saved** page displays.

Password Changed

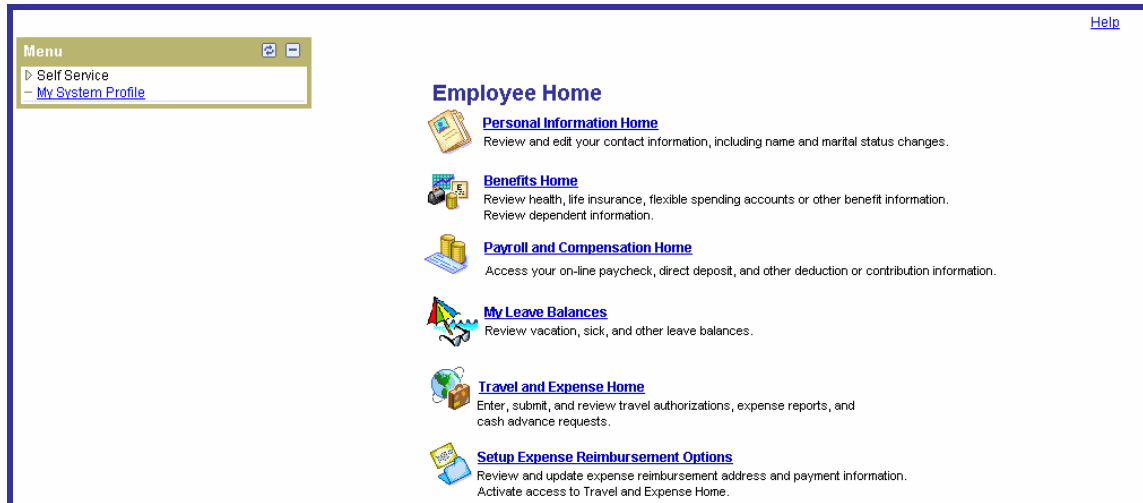
Password Saved

✓ Your password has successfully been changed.

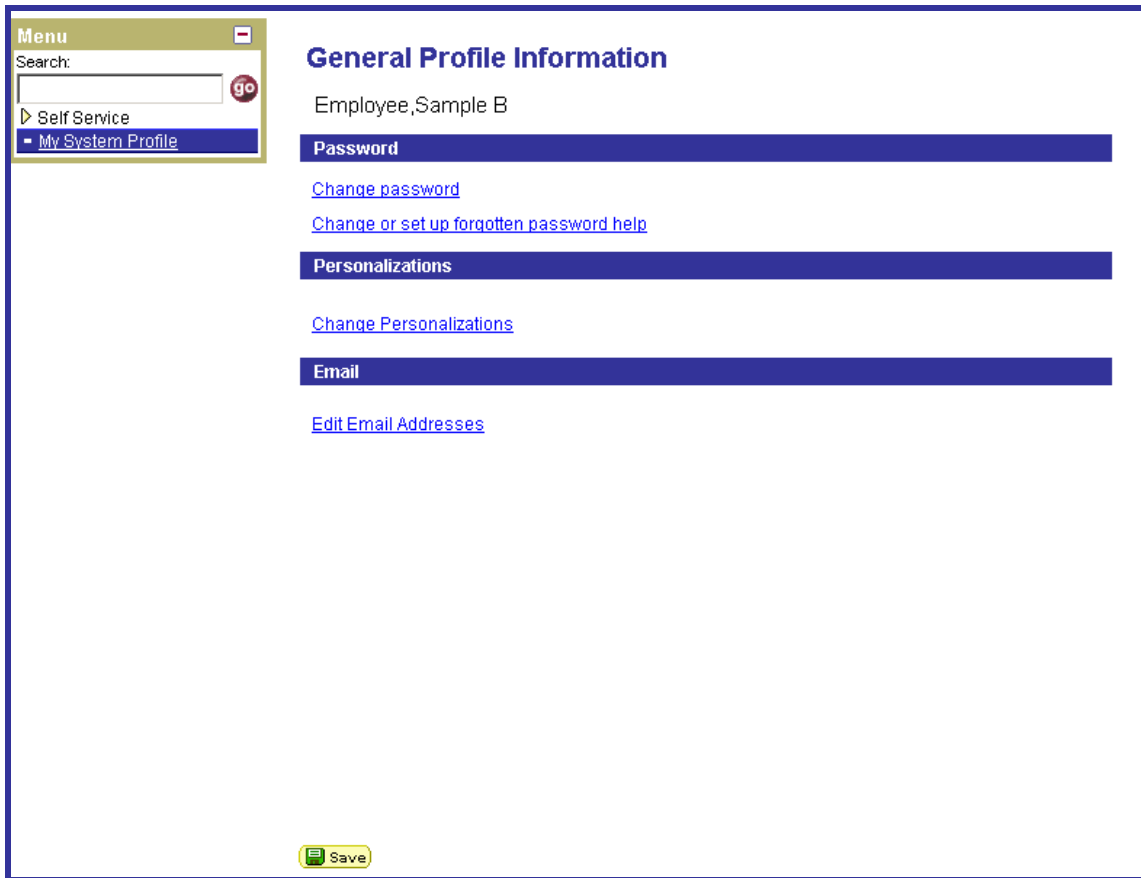
12. Click on . The **Employee Home** page displays.

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.



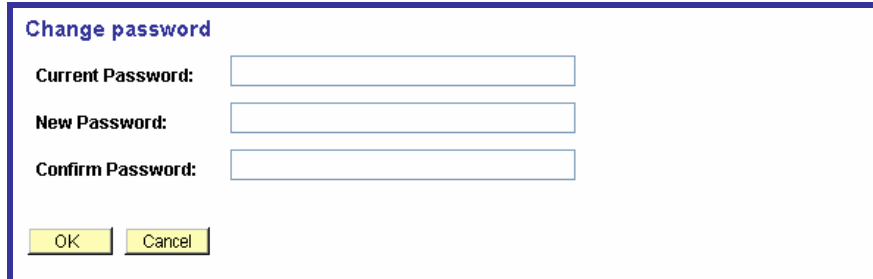
NOTE: With the addition of the new Travel and Expense functionality, which uses PeopleSoft Financials as well as HRMS, a separate **My System Profile** was added to PeopleSoft Financials as well. Please note the following:

- 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

1. Click on [Change password](#) in the **Password** group box on the **General Profile Information** page. The **Change password** page displays.



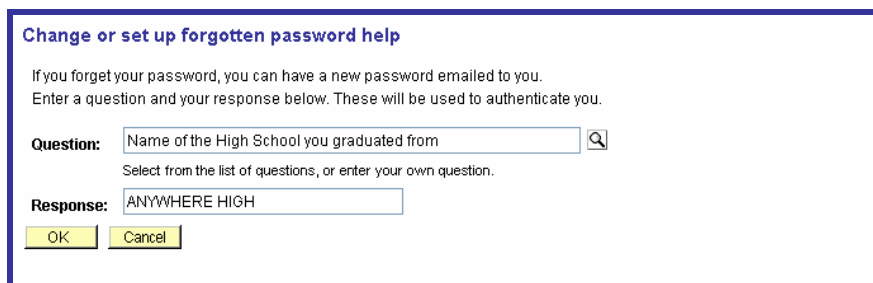
Change password

Current Password:

New Password:

Confirm Password:

2. Enter **your current Password** in the **Current Password** field.
3. Enter **your new Password** in the **New Password** field.
4. Re-enter **your new Password** in the **Confirm Password** field.
5. Click on . This takes you back to the **General Profile Information** page.
6. Click on 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.



Change or set up forgotten password help

If you forget your password, you can have a new password emailed to you.
Enter a question and your response below. These will be used to authenticate you.

Question:

Select from the list of questions, or enter your own question.

Response:

8. Verify your **Password Hint question** in the **Question** field.
9. Verify the **answer to your Password Hint question** in the **Response** field.
 - **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 .
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.

Personalizations
Employee, Sample

Standard settings are in effect.
Changes to Personalization settings require you to log off and log back on in order to take effect.

Personalization Categories

Description	Personalize Option
General Options	Personalize Option

[Restore Defaults](#)

[Cancel](#)

2. Click on [Personalize Option](#). The **Option Category** page for Accessibility Features displays.


Option Category: General Options

Personalizations Find First 1 of 1 Last

Personalization Option	Default Value	Override Value
Accessibility Features	Accessibility features off	<input type="text"/>

[Restore Category Defaults](#)

[OK](#) [Cancel](#)

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

Option Category: General Options


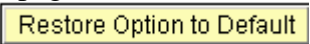


Personalizations Find First 1 of 1 Last

Personalization Option	Default Value	Override Value
Accessibility Features	Accessibility features off	Use accessible layout mode




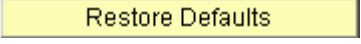

[Restore Category Defaults](#)

[OK](#) [Cancel](#)

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  to return to the **Option Category: General Options** page.
 - **NOTE 2:** You can click on  on this page to return the option to its default value if you do not like the change that you made.
5. Click on  to accept the changes that you made. This brings you to the **Save Confirm** page.
 - **NOTE:** You can click on  to return all the options to their default values if you do not like the changes that you made.



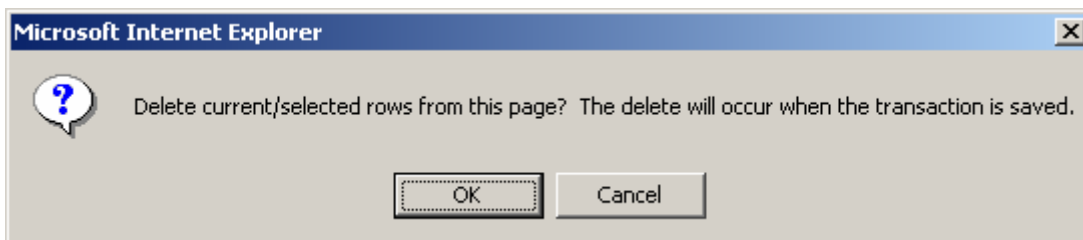
6. Verify  Your Personalizations have been saved. appears.
7. Click on . This brings you back to the **Personalizations** page.
8. Click on . This brings you back to the **General Profile Information** page.
 - **NOTE:** You can click on  to restore all the personalizations to their default values.
9. Click on  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.



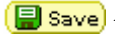
Primary Email Account	Email Type	Email Address
<input checked="" type="checkbox"/>	Home	sample.employee@yahoo.com

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

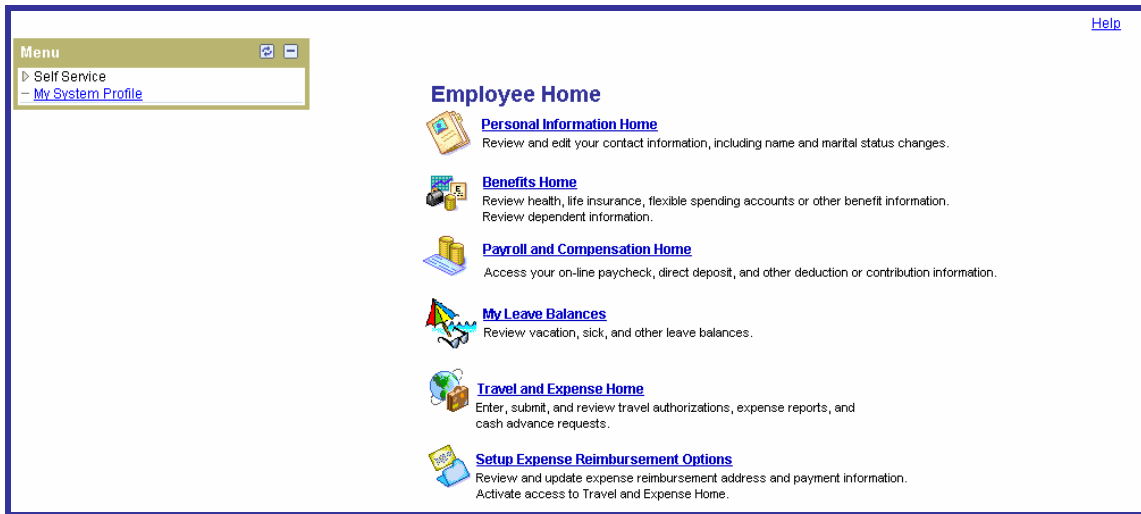
brings you back to the **Email Addresses** page.

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

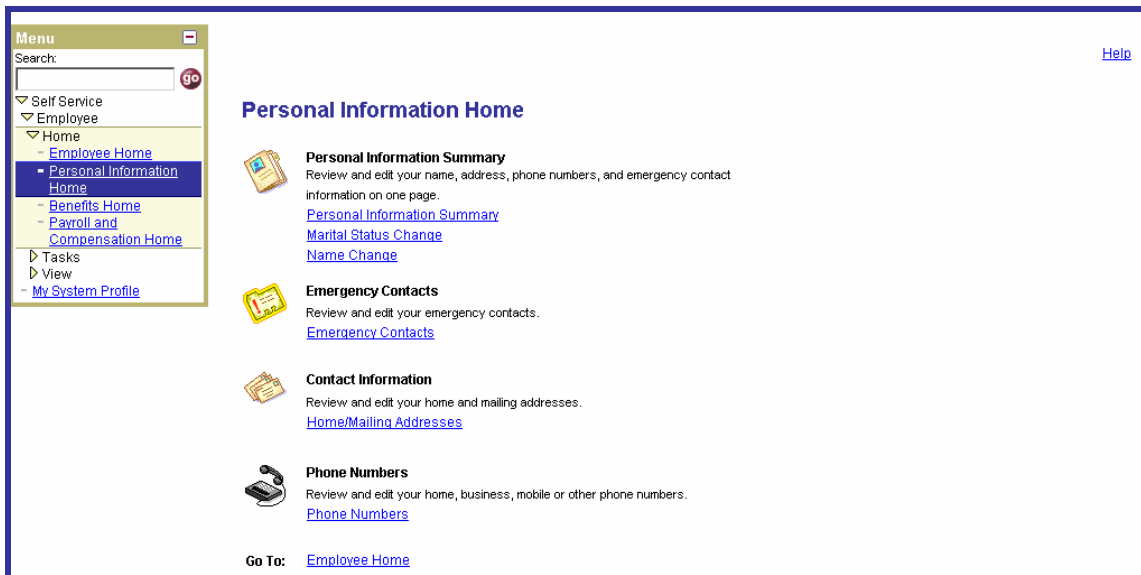
Your Personal Information

Reviewing Your Personal Information

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 **[Personal Information Summary](#)**. The **Personal Information** page displays.
 - You can also select **Self Service, Employee, View, Personal Information Summary**.

Personal Information

Sample Employee

Name

Employee,Sample

Change name

Addresses

Address Type	Status	As Of	Country	Address
Home	Current	05/10/1999	USA	1234 Self Service Lane Anywhere, GA 30999 PeopleSoft
Mailing	Current	11/03/2006	USA	1234 Self Service Ave Anywhere, GA 30999

Change home/mailling addresses

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.

Phone Numbers

Phone Type	Phone Number
Business	706/555-1234
Home	706/555-5678

Change phone numbers

Emergency Contacts

Name	Relationship to Employee	Primary Contact
Employee,Spouse	Spouse	<input checked="" type="checkbox"/>

Change emergency contacts

Marital Status

Marital Status: Married

Change marital status

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](#), to go directly to the appropriate page to change the information in that section.

Employee Information	
Gender:	Male
Date of Birth:	01/01/1960
Birth Country:	
Birth State:	
Social Security Number:	View details
Smoker Status:	Non Smoker
Ethnic Group:	White
Date Entitled to Medicare:	
Military Status:	Not indicated
Original Hire Date:	05/10/1999
Highest Education Level:	J-Doctorate (Academic)

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](#) 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.

Request Marital Status Change

Sample Employee

Fill in the following information and click the submit button. All documentation must be received by HR within 31 days of the life event.

*Date Change Will Take Effect:

Current Marital Status: Married

*Change Marital Status To:

Go To: [Employee Home](#)
[Personal Information Home](#)

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 . The **Request Marital Status Change Submit Confirmation** page displays.

Request Marital Status Change
Submit Confirmation

✓ The Submit was successful.
 Your marital status change request has been submitted, however the change cannot be completed until you provide a copy of the appropriate supporting documentation to the HR department. (i.e. marriage certificate, divorce decree, death certificate, etc.). All documentation must be received by HR within 31 days of the life event.

OK

8. Verify ✓ The Submit was successful. appears.

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

Request Marital Status Change

Sample Employee

This information was submitted.

*Date Change Will Take Effect: 10/31/2006

Current Marital Status: Married


*Change Marital Status To: Divorced

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**.

Submitted - Marital Status - Sample Employee - Your request was submitted Standard Header ▾

"noreply@usg.edu" <noreply@usg.edu>  Add Friday, November 3, 2006 11:31:34 AM

To: sample.employee@yahoo.com

Your request was successfully submitted. This request requires administrator action to be saved to the database.

Transaction Name: Marital Status
 Employee Name: Sample Employee
 Emplid: 000033

- **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.

Informational - Marital Status - Sample Employee - Approved	Standard Header ▼
"noreply@usg.edu" <noreply@usg.edu>  Add	Friday, November 3, 2006 11:35:02 AM
To: sample.employee@yahoo.com	
Your request was approved:	
Approver Name:	
Transaction Name: Marital Status	
Employee Name: Sample Employee	
Emplid: 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.

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 **[Name Change](#)** in the **Personal Information Summary** section. The **Name Change** page displays.
 - **NOTE:** You can also select **Self Service, Employee, Tasks, [Name Change](#)**.

Sample Employee

Click **Submit** after you have entered your new name.
You are required to provide proof of your name change to your campus Human Resources department via a copy of your new Social Security card.

Current Name

Name			
Prefix:	Mister		
First:	Sample	Middle:	
Last:	Employee	Suffix:	
Name:	Employee,Sample		

New Name

*Date Name Change Will Take Effect:


Name Format: United States [Change Country](#)


Name			
Prefix:	<input type="text" value="Mister"/>		
*First Name:	<input type="text" value="Sample"/>	Middle:	<input type="text"/>
*Last Name:	<input type="text" value="Employee"/>	Suffix:	<input type="text"/>


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 . The **Name Change Submit Confirmation** page displays.

Name Change Submit Confirmation

 The Submit was successful.
Your name change request has been submitted, however the change cannot be completed until you provide a copy of your new Social Security card to the HR department.



8. Verify  The Submit was successful. appears.

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

New Name

Date Name Change Will Take Effect: 11/03/2006

Name Format: United States Change Country


Name			
Prefix:	Mister	Middle:	P
First Name:	Sample	Suffix:	
Last Name:	Employee		

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.

Submitted - Name Change - Sample Employee - Your request was submitted Standard Header ▾

"noreply@usg.edu" <noreply@usg.edu>  Add Friday, November 3, 2006 1:45:33 PM

To: sample.employee@yahoo.com

Your request was successfully submitted. This request requires administrator action to be saved to the database.

Transaction Name: Name Change
Employee Name: Sample Employee
Emplid: 000033

- **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.

Informational - Name Change - Sample Employee - Approved	Standard Header ▼
"noreply@usg.edu" <noreply@usg.edu>  Add	Friday, November 3, 2006 1:49:22 PM
To: sample.employee@yahoo.com	
Your request was approved:	
Approver Name:	
Transaction Name: Name Change	
Employee Name: Sample Employee	
Emplid: 000033	

Reviewing and Changing Your Emergency Contact Information

Reviewing Your Existing Contacts

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 **[Emergency Contacts](#)** under **Emergency Contacts**. The **Emergency Contacts** page displays.
 - **NOTE:** You can also select **Self Service, Employee, Tasks, [Emergency Contacts](#)**.

Emergency Contacts

Sample Employee

Contact Name	Relationship to Employee		
Employee, Spouse	Spouse	Edit	Delete

Primary Contact: Employee, Spouse Change the primary contact

Add an Emergency Contact

4. Review the existing contact information.
5. Click on the **[Contact Name](#)**. The **Emergency Contact Detail** page displays.

Emergency Contacts

Emergency Contact Detail

Sample Employee

Address and Telephone

Contact Name: Employee, Spouse

Relationship to Employee: Spouse

Contact has the same address as the employee

Contact has the same telephone number as the employee

Address Type: Home

Phone Type: Home

Address

Country: United States

Address: 1234 Self Service Lane
Anywhere, GA 30999
PeopleSoft

Employee's Phone

Phone: 706/555-5678

Other Telephone Numbers

<u>Phone Type</u>	<u>Phone Number</u>
Business	706/354-1589
Other	706/207-4696

[Return to Emergency Contacts](#)

6. Click on [Return to Emergency Contacts](#) to go back to the **Emergency Contacts** page.

Changing an Existing Contact

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

Emergency Contacts

Emergency Contact Detail

Sample Employee

Address and Telephone

*Contact Name:

*Relationship to Employee:

Contact has the same address as the employee

Contact has the same telephone number as the employee

Address Type: Home [Change Address Type](#)

Phone Type: Home [Change Telephone Type](#)

Address

Country: United States [Change Country](#)

Address: 1234 Self Service Lane
Anywhere, GA 30999 [Edit Address](#)
PeopleSoft

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

Employee's Phone

Phone: 706/555-5678

Other Telephone Numbers

*Phone Type	Phone Number	
<input type="text" value="Business"/>	<input type="text" value="706/354-1589"/>	<input type="button" value="Delete"/>
<input type="text" value="Other"/>	<input type="text" value="706/207-4696"/>	<input type="button" value="Delete"/>


- Enter the information in the fields as needed.
 - NOTE:** Fields marked with an * are required fields.
- Click on . The **Save Confirmation** page displays.

Emergency Contacts


Save Confirmation

The Save was successful.

- Verify The Save was successful. appears.

6. Click on . This brings you back to the **Emergency Contacts** page.

Deleting an Existing Contact

1. Click on . The **Delete Confirmation** page displays.
 - **NOTE:** You cannot delete a Primary Contact unless you designate a new Primary Contact first.



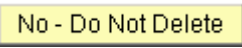


Emergency Contacts


Delete Confirmation

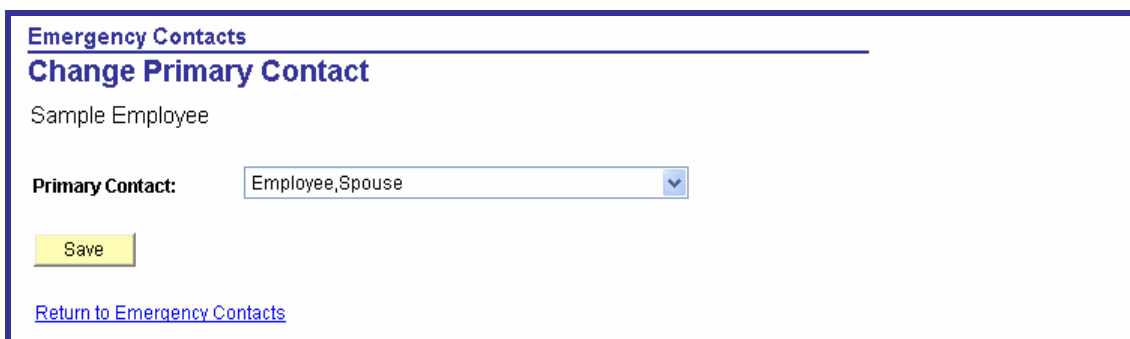
? Are you sure you want to delete Emergency Contact (Daughter Employee)?

2. Verify  Are you sure you want to delete Emergency Contact (Daughter Employee)? appears.
3. Click on  to delete the contact, or  to cancel the deletion. This brings you back to the **Emergency Contacts** page.
4. Verify the contact has been deleted.

Changing Your Primary Contact

1. Click on . The **Change Primary Contact** page displays.

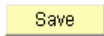


Emergency Contacts


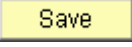

Change Primary Contact


Sample Employee

Primary Contact:



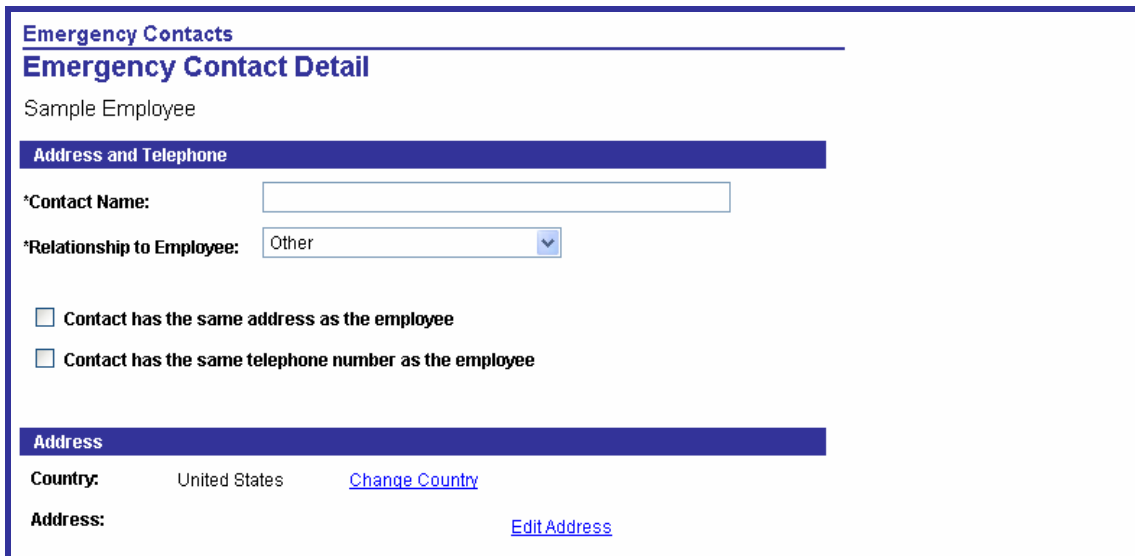
[Return to Emergency Contacts](#)

2. Click on the  and select a new **Primary Contact** from the drop-down list.
3. Click on . The **Save Confirmation** page displays.
4. Verify  The Save was successful. appears.


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

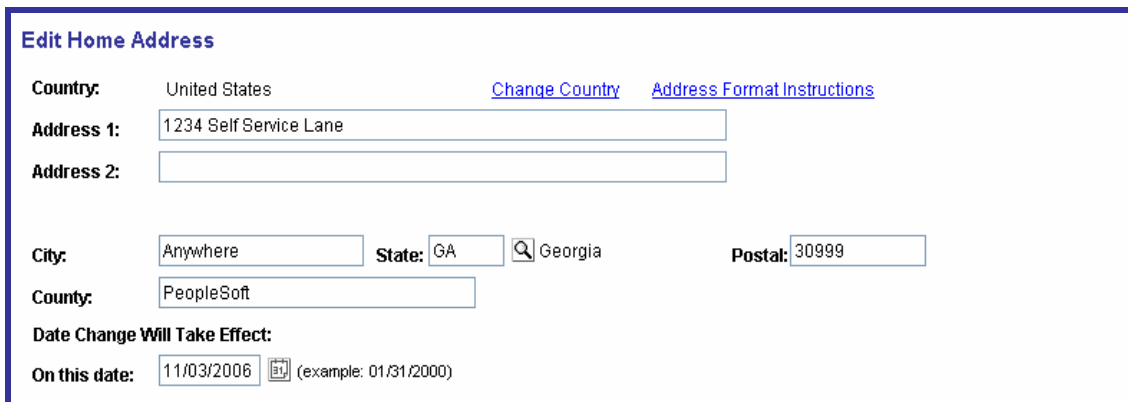
Adding a New Emergency Contact

1. Click on . The **Emergency Contact Detail** page displays.



The screenshot shows the 'Emergency Contact Detail' page for a 'Sample Employee'. The page is titled 'Emergency Contacts' and 'Emergency Contact Detail'. It features a section for 'Address and Telephone' with the following fields: '*Contact Name:' (text input), '*Relationship to Employee:' (drop-down menu with 'Other' selected), and two checkboxes: 'Contact has the same address as the employee' and 'Contact has the same telephone number as the employee'. Below this is an 'Address' section with 'Country:' (United States, with a 'Change Country' link) and 'Address:' (with an 'Edit Address' link).

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.



The screenshot shows the 'Edit Home Address' page. It includes the following fields: 'Country:' (United States, with 'Change Country' and 'Address Format Instructions' links), 'Address 1:' (1234 Self Service Lane), 'Address 2:' (empty), 'City:' (Anywhere), 'State:' (GA, with a search icon and 'Georgia'), 'Postal:' (30999), 'County:' (PeopleSoft), and 'Date Change Will Take Effect:' (On this date: 11/03/2006, with a calendar icon and '(example: 01/31/2000)').

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 to return to the **Edit Home Address** page.





Address Format Instructions													
<table border="1"> <thead> <tr> <th>Zip Codes</th> </tr> </thead> <tbody> <tr> <td>Five (5) digits with no punctuation.</td> </tr> <tr> <td>Nine (9) digits with a hyphen between the 5th and 6th digit.</td> </tr> </tbody> </table>	Zip Codes	Five (5) digits with no punctuation.	Nine (9) digits with a hyphen between the 5th and 6th digit.	<table border="1"> <thead> <tr> <th>Examples</th> </tr> </thead> <tbody> <tr> <td>12345</td> </tr> <tr> <td>12345-6789</td> </tr> </tbody> </table>	Examples	12345	12345-6789						
Zip Codes													
Five (5) digits with no punctuation.													
Nine (9) digits with a hyphen between the 5th and 6th digit.													
Examples													
12345													
12345-6789													
<table border="1"> <thead> <tr> <th>Street Abbreviations</th> </tr> </thead> <tbody> <tr> <td>Street addresses should include abbreviated street suffixes.</td> </tr> <tr> <td>No periods after street abbreviations.</td> </tr> <tr> <td>No periods after directional indicators.</td> </tr> <tr> <td>No pound sign (#) to designate apartment or suite numbers.</td> </tr> <tr> <td>Use 'Apt' or 'Ste' to designate apartments or suites.</td> </tr> <tr> <td>Do not allow solitary numbers for apartment numbers.</td> </tr> </tbody> </table>	Street Abbreviations	Street addresses should include abbreviated street suffixes.	No periods after street abbreviations.	No periods after directional indicators.	No pound sign (#) to designate apartment or suite numbers.	Use 'Apt' or 'Ste' to designate apartments or suites.	Do not allow solitary numbers for apartment numbers.	<table border="1"> <tbody> <tr> <td>St, Dr, Blvd</td> </tr> <tr> <td>Rd, Ln, Hwy</td> </tr> <tr> <td>NE, SW, S, E</td> </tr> <tr> <td>Apt 12</td> </tr> <tr> <td>12 instead of Apt 12</td> </tr> </tbody> </table>	St, Dr, Blvd	Rd, Ln, Hwy	NE, SW, S, E	Apt 12	12 instead of Apt 12
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St, Dr, Blvd													
Rd, Ln, Hwy													
NE, SW, S, E													
Apt 12													
12 instead of Apt 12													
<input type="button" value="OK"/> <input type="button" value="Cancel"/>													

- **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 to return to the **Emergency Contact Detail** page.

Phone	
Telephone:	<input type="text"/>
Other Telephone Numbers	
*Phone Type	Phone Number
<input type="button" value="Add a Phone Number"/>	
* Required Field	
<input type="button" value="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 .
 - **NOTE:** Fields marked with an * are required fields.
10. Click on . The **Emergency Contacts Save Confirmation** page displays.
 - **NOTE:** Incomplete addresses will not be saved.
11. Verify  The Save was successful. appears.
12. Click on . 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

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 **[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

Sample Employee

Addresses					
Address Type	Status	As Of	Country	Address	
Home	Current	05/10/1999	USA	1234 Self Service Lane Anywhere, GA 30999 PeopleSoft	Edit
Mailing	Current	11/03/2006	USA	1234 Self Service Ave Anywhere, GA 30999	Edit

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

Country: United States [Change Country](#) [Address Format Instructions](#)

Address 1:

Address 2:

City: State: Postal:

County:


Date Change Will Take Effect:

On this date: (example: 01/31/2000)

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.

Address Format Instructions	
<p>Zip Codes</p> <p>Five (5) digits with no punctuation.</p> <p>Nine (9) digits with a hyphen between the 5th and 6th digit.</p>	<p>Examples</p> <p>12345</p> <p>12345-6789</p>
<p>Street Abbreviations</p> <p>Street addresses should include abbreviated street suffixes.</p> <p>No periods after street abbreviations.</p> <p>No periods after directional indicators.</p> <p>No pound sign (#) to designate apartment or suite numbers.</p> <p>Use 'Apt' or 'Ste' to designate apartments or suites.</p> <p>Do not allow solitary numbers for apartment numbers.</p>	<p>St, Dr, Blvd</p> <p>Rd, Ln, Hwy</p> <p>NE, SW, S, E</p> <p>Apt 12</p> <p>12 instead of Apt 12</p>
<p>OK</p> <p>Cancel</p>	

- **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 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 . 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 . 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.

Home and Mailing Address

Sample Employee

Addresses				
Address Type	Status	As Of	Country	Address
Home	Current	05/10/1999	USA	1234 Self Service Lane Anywhere, GA 30999 PeopleSoft

*Address Type:

* Required Field

- Click on the and select **Mail** from the **Address Type** drop-down list.
 - NOTE:** Fields marked with an * are required fields.
- Click on . The appropriate **Add Mailing Address** page displays.

Add Mailing Address

Country: United States [Change Country](#) [Address Format Instructions](#)

Address 1:

Address 2:

City: State: Georgia Postal:


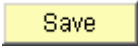


County:

Date Change Will Take Effect:

On this date: (example: 01/31/2000)

- 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.

Address Format Instructions	
<p>Zip Codes</p> <p>Five (5) digits with no punctuation.</p> <p>Nine (9) digits with a hyphen between the 5th and 6th digit.</p>	<p>Examples</p> <p>12345</p> <p>12345-6789</p>
<p>Street Abbreviations</p> <p>Street addresses should include abbreviated street suffixes.</p> <p>No periods after street abbreviations.</p> <p>No periods after directional indicators.</p> <p>No pound sign (#) to designate apartment or suite numbers.</p> <p>Use 'Apt' or 'Ste' to designate apartments or suites.</p> <p>Do not allow solitary numbers for apartment numbers.</p>	<p>St, Dr, Blvd</p> <p>Rd, Ln, Hwy</p> <p>NE, SW, S, E</p> <p>Apt 12</p> <p>12 instead of Apt 12</p>
<p>OK</p> <p>Cancel</p>	

- **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  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 . 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 . 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

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 **[Phone Numbers](#)** under **Phone Numbers**. The **Phone Numbers** page displays.
 - **NOTE:** You can also select **Self Service, Employee, Tasks, [Phone Numbers](#)**.

Phone Numbers

Sample Employee


Enter your phone numbers below.

*Phone Type	Telephone	
Business	706/555-1234	Delete
Home	706/555-5678	Delete

Add a Phone Number

4. Review the **Phone Type** and **Telephone** information.

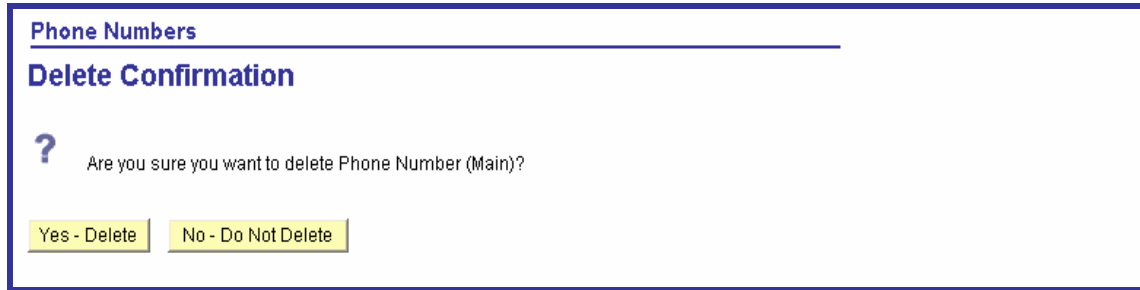
Changing an Existing Phone Number

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.


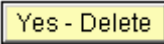
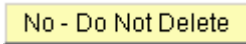


Phone Numbers

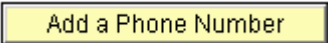
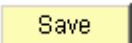


Delete Confirmation

? 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  to delete the contact, or  to cancel the deletion. This brings you back to the **Phone Numbers** page.
4. Verify the phone number is deleted.

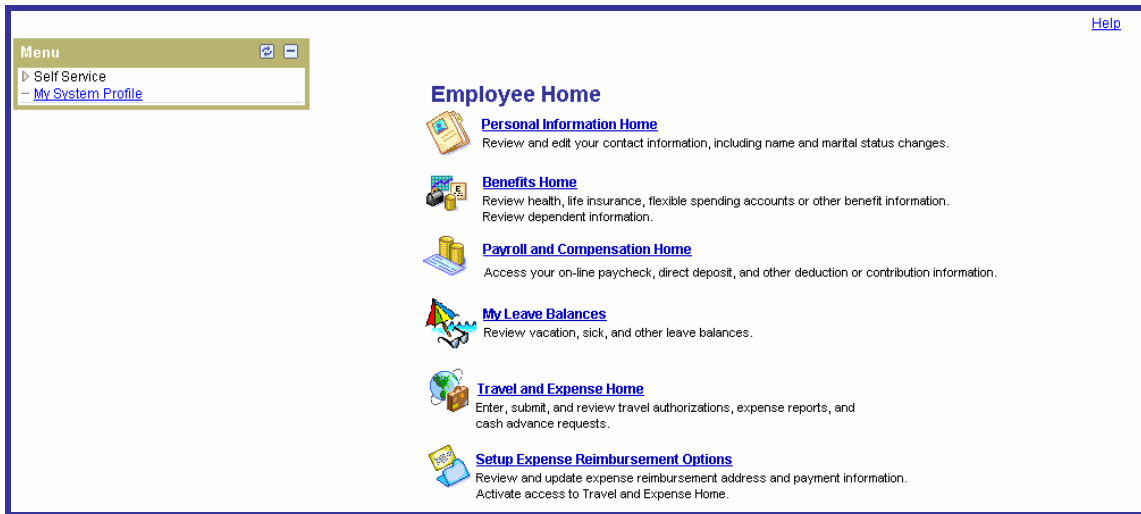
Adding a New Phone Number

1. Click on . 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: xxxxxxxxxxx (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: xxxxxxxxxxx (ex. 7065551111).**
4. Click on . The **Phone Numbers Save Confirmation** page displays.
5. Verify  The Save was successful. appears.
6. Click on . This brings you back to the **Phone Numbers** page.
7. Verify the telephone information.

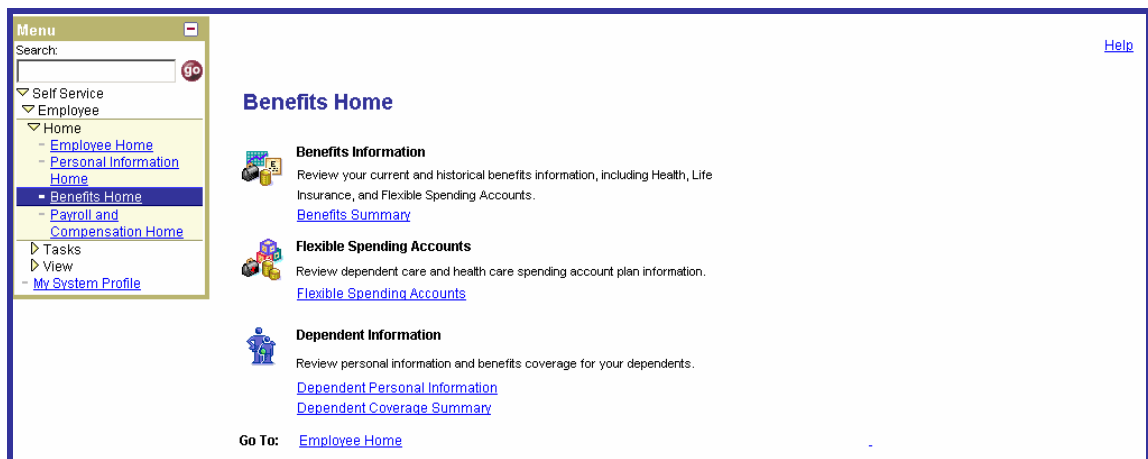
Your Benefits Information

Reviewing Your Benefits Summary

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 **[Benefits Summary](#)** in the **Benefits Information** section. The **Benefits Summary** page displays.
 - **NOTE:** You can also select **Self Service, Employee, View, Benefits Summary**.

Benefits Summary

Sample Employee

[Current Medical/Dental Rates](#)

To view your benefits as of another date, enter the date and click Go:

11/03/2006

Type of Benefit	Plan Description	Coverage or Participation
Medical	PPO Before Tax	Empl+1
Dental	Regents Dental	Empl Only
Life and AD/D	Basic Life 25,000	\$25,000
Supplemental Life and AD/D	Regents Supp Life 1X After	1 X Salary
Long-Term Disability	Long Term Disability TRS 150	60% of Salary
Sick	Sick Leave (FTE .90 - 1.00)	-----
Vacation	Vacation (FTE - 1.00)	-----
Flex Spending Health - U.S.	Health Care Spending Account	\$300 Pledge
Teachers Retirement System	Teachers Ret Sys 07/01/1996	5% of Earnings

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 .
- 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 to return to the **Benefits Summary** page.

Current benefit rates for eligible benefit plans			
Plan	Coverage	Frequency	Empl Premium
1 Blue Choice Before Tax	Emp+Child	M	\$117.60
2 Blue Choice Before Tax	Emp+Spouse	M	\$137.20
3 Blue Choice Before Tax	Empl Only	M	\$65.34
4 Blue Choice Before Tax	Family	M	\$189.48
5 BlueChoice Cons Ch Before Tax	Emp+Child	M	\$199.92
6 BlueChoice Cons Ch Before Tax	Emp+Spouse	M	\$233.24
7 BlueChoice Cons Ch Before Tax	Empl Only	M	\$111.08
8 BlueChoice Cons Ch Before Tax	Family	M	\$322.10
9 Kaiser	Emp+Child	M	\$130.36
10 Kaiser	Emp+Spouse	M	\$152.08
11 Kaiser	Empl Only	M	\$72.42
12 Kaiser	Family	M	\$210.00
13 Kaiser Cons Choice Before Tax	Emp+Child	M	\$221.60
14 Kaiser Cons Choice Before Tax	Emp+Spouse	M	\$258.52
15 Kaiser Cons Choice Before Tax	Empl Only	M	\$123.10
16 Kaiser Cons Choice Before Tax	Family	M	\$357.00
17 PPO Before Tax	Emp+Child	M	\$147.62
18 PPO Before Tax	Emp+Spouse	M	\$172.22
19 PPO Before Tax	Empl Only	M	\$82.02
20 PPO Before Tax	Family	M	\$237.80
21 PPO Consumer Choice Before Tax	Emp+Child	M	\$206.68
22 PPO Consumer Choice Before Tax	Emp+Spouse	M	\$241.10
23 PPO Consumer Choice Before Tax	Empl Only	M	\$114.84
24 PPO Consumer Choice Before Tax	Family	M	\$332.92
25 Regents Dental	Emp+Child	M	\$51.74
26 Regents Dental	Emp+Spouse	M	\$54.46

5. Click on the individual links ([Medical](#), etc.) to display a separate page containing more detailed information for each enrolled Benefit.

Medical

Sample Employee
To view your benefits as of another date, enter the date and click Go:

11/03/2006

Medical

Plan Name: PPO Before Tax
Plan Provider: BORPPO - BlueCross BlueShield
Coverage: Employee + 1
Group Number: BOR0980
Customer Service: **Ext:**

Covered Dependents

<u>Name</u>	<u>Relationship</u>
Spouse Employee	Spouse

6. Click on [Return to Employee Benefit Summary](#) to return to the **Benefits Summary** page.

Reviewing Your Flexible Spending Accounts

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 **[Flexible Spending Accounts](#)** in the **Flexible Spending Accounts** section. The **Flexible Spending Accounts** page displays.

Flexible Spending Accounts

Sample Employee

Your Flexible Spending Account(s) in 2006

Select Calendar Year

You may review your Flexible Spending Account status and activity for any calendar year.

To review past benefits information, enter the year and click the Go button.

Calendar Year: (YYYY)

Select Account

For this Calendar Year you are enrolled in the Flexible Spending Account(s) listed below. Please click on the one you wish to review.

<u>Spending Account</u>	<u>Annual Pledge</u>	<u>Contributions YTD</u>
Health Care Spending Account	300.00	212.50

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 .
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](#)**.

Dependent Summary

Click the Dependent's name if you would like to review or change personal information.

Summary

[Spouse Employee](#)

Address:	1234 Self Service Lane	Relationship to Employee:	Spouse
City:	Anywhere	Date of Birth:	01/01/1964
State:	GA	Social Security Number:	View details
Country:	United States		
Zip Code:	30999		
Telephone:	706/555-7890		

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.

Dependent Personal Information

Click Edit at the bottom of this page to update your Dependent's personal information.

Personal Information	
First Name:	Spouse
Middle Name:	
Last Name:	Employee
Name Prefix:	Mrs
Name Suffix:	
Gender:	Female
Birthdate:	01/01/1964
SSN:	View details (Social Security Number)
Relationship to Employee:	Spouse

Status Information	
Marital Status:	Married
Student:	No
Disabled:	No
Smoker:	No

6. Review the Dependent Personal Information in these sections:

- **Personal Information**
- **Status Information**

Address and Telephone	
<input type="checkbox"/>	Same Address as Employee
<input type="checkbox"/>	Same Phone as Employee

Address	
Country:	United States
Address:	1234 Self Service Lane Anywhere, GA 30999 PeopleSoft

Address	
Phone:	706/555-7890

* Required Field

[Edit](#)


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 . 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

Click Save once you have edited your Dependent's personal information.

Personal Information	
First Name:	Spouse
Middle Name:	
Last Name:	Employee
Name Prefix:	Mrs
Name Suffix:	
Gender:	Female
Birthdate:	01/01/1964
SSN:	 (Social Security Number)
Relationship to Employee:	Spouse

Status Information	
*Marital Status:	<input type="text" value="Married"/>
Student:	<input type="text" value="No"/>
Disabled:	<input type="text" value="No"/>
Smoker:	<input type="text" value="No"/>

Address and Telephone

Same Address as Employee
 Same Phone as Employee

Address

Country: United States [Change Country](#)
Address: 1234 Self Service Lane [Edit Address](#)
Anywhere, GA 30999
PeopleSoft

Address

Phone:

* Required Field

[Return to Dependent Summary](#)

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.

Edit Address

Country: United States [Change Country](#) [Address Format Instructions](#)

Address 1:

Address 2:

City: State: Postal:



County:

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.

Address Format Instructions

Zip Codes	Examples
Five (5) digits with no punctuation.	12345
Nine (9) digits with a hyphen between the 5th and 6th digit.	12345-6789
Street Abbreviations	
Street addresses should include abbreviated street suffixes.	St, Dr, Blvd
No periods after street abbreviations.	Rd, Ln, Hwy
No periods after directional indicators.	NE, SW, S, E
No pound sign (#) to designate apartment or suite numbers.	Apt 12
Use 'Apt' or 'Ste' to designate apartments or suites.	12 instead of Apt 12
Do not allow solitary numbers for apartment numbers.	

- **NOTE 3:** 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 to return to the **Edit Home Address** page.
5. Click on . 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 . The **Save Confirmation** page displays.
 - **NOTE:** Incomplete addresses will not be saved.

8. Verify  The Save was successful. appears.
9. Click on . 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

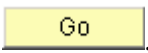
1. Click on [Dependent Coverage Summary](#) in the **Dependent Information** section. The **Dependent Coverage Summary** page displays.
 - **NOTE:** You can also select **Self Service, Employee, View, Dependent Coverage**.

Dependent Coverage Summary

Sample Employee

To view your benefits as of another date, enter the date and click Go:

Dependent Name	Relationship	Type of Benefit	Description
Spouse Employee	Spouse	Medical	PPO Before Tax

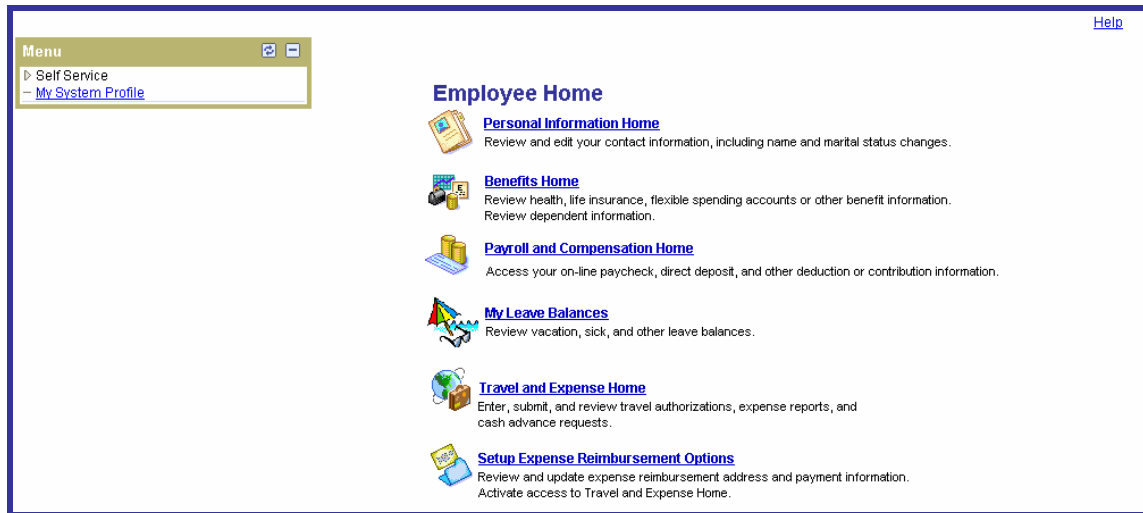
2. Review the Dependent Coverage Summary information. This page provides a list of your current dependents, their benefits coverage, and their contact information as of today's date.
 - If you would like to see a Dependent Coverage Summary for another date, enter that date (MM/DD/YYYY) and click on .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

1. Select **Self Service, Employee, Home, [Employee Home](#)**. The **Employee Home** page displays.



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.

Menu

Search: [go](#)

- Self Service
- Employee
 - Home
 - [Employee Home](#)
 - [Personal Information Home](#)
 - [Benefits Home](#)
 - [Payroll and Compensation Home](#)**
 - Tasks
 - View
 - [My System Profile](#)

Payroll and Compensation Home

Payroll

[View Paycheck](#)
View your current and prior earnings statements on-line.
*Note: YTD and leave balances are only shown on your most recent paycheck. Your paycheck may post for viewing in advance of your actual pay date. However, funds will not post to your account until the check date noted on your paycheck.

[Direct Deposit](#)
Review and edit your direct deposit accounts.

[Voluntary Deductions](#)
Review and edit your voluntary deductions.

Taxes

[W-4 Tax Information](#)
Review and edit your federal tax withholding exemption and amount.

[W-2 Reissue Request](#)
Request a reissue of your W-2 statement.

Go To: [Employee Home](#)

[Help](#)

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**.

View Paycheck [Print-Friendly Paycheck](#)

Sample Employee

Company: Board of Regents

Address: University System of Georgia
270 Washington Street, SW
Atlanta, GA 30334

Net Pay: \$1,917.60

Pay Begin Date: 09/01/2006

Pay End Date: 09/15/2006

Check Date: 09/15/2006



[View a Different Payment](#)

General

Name: Sample Employee	Business Unit: 99999
Employee ID: 000033	Pay Group: Semi-Monthly
Address: 1234 Self Service Lane Anywhere, GA 30999	Department: 9991999 – Self Service
	Location: University System of Georgia
	Job Title: Project Manager
	Pay Rate: \$3,268.82 Semimonthly

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 . Your paycheck displays in a printer-friendly format.
6. Click on  in your browser's toolbar. Your paycheck prints at your default printer.

Reviewing and Changing Your Direct Deposit

Reviewing Your Direct Deposit Information

1. Select **Self Service, Employee, Home, Employee Home**. The **Employee Home** page displays.
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](#)**.

Direct Deposit
Sample Employee

Direct Deposit Detail							
Account Type	Routing Number	Account Number	Deposit Type	Amt/Pct	Deposit Order		
Savings	061000052	1111111111	Amount	\$314	100	Edit	Delete
Savings	061000052	2222222222	Amount	\$242	200	Edit	Delete
Checking	061000052	3333333333	Amount	\$600	300	Edit	Delete
Checking	061000052	4444444444	Balance		999	Edit	Delete

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, please add one now. The Balance row cannot be deleted!

4. Click on the **Account Type** link ([Savings](#), etc.) to review the details of each account on the **Direct Deposit Detail** page.

Direct Deposit

Direct Deposit Detail
Sample Employee

Account Type: Savings

Deposit Type: Amount [Direct Deposit Help](#)

Amount/Percent: 242.00

Routing Number: 061000052 [View check example](#)

Account Number: 2222222222

Deposit Order: 200 (example: 100 = first account processed)

5. Click on [Return to Direct Deposit](#) to return to the **Direct Deposit** page.

Changing Your Direct Deposit

1. Click on 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.

Direct Deposit

Change Direct Deposit

Sample Employee

*Account Type:

*Deposit Type: [Direct Deposit Help](#)

Amount/Percent:

Routing Number: [View check example](#)

Account Number:

Deposit Order: (example: 100 = first account processed)

* Required Field

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 to return to the **Change Direct Deposit** page.

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

1 - Routing Number
2 - Account Number



4. Click on [Direct Deposit Help](#) for more information. Click on 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.

Field Name	Instruction
Account Type	Select whether this is a 'Checking' or a 'Savings' account.
Deposit Type	Choose "Amount" if you want to select a Dollar Amount. Choose "Percent" if you want to select a percentage of the remaining net pay. Choose "Balance" if you want to select the balance of the remaining net pay.
Amount/Percent	If you selected Deposit Type = Amount, enter a Dollar amount here. If you selected Deposit Type = Percentage, enter a percentage here. If you selected Deposit Type = Balance, leave this field blank.
Routing Number and Account Number	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 "View Check Example" 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.
Deposit Order	The Direct Deposit feature will process the lowest Deposit first. So, 100 will be processed before 200, etc.

5. Click on 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 . 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



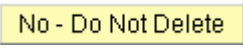
1. Click on  to delete the appropriate account. The **Delete Confirmation** page displays.
 - **NOTE:** The Balance row can be edited to reflect new account information, but cannot be deleted.

Direct Deposit

Delete Confirmation

 Are you sure you want to delete this Deposit Account: 3333333333?

2. Verify that  Are you sure you want to delete this Deposit Account: 3333333333? appears.
3. Click  to delete the account or  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 . The **Add Direct Deposit** page displays.

Direct Deposit

Add Direct Deposit

Sample Employee

*Account Type:

*Deposit Type: [Direct Deposit Help](#)

Amount/Percent:

Routing Number: [View check example](#)

Account Number:

Deposit Order: (example: 100 = first account processed)

* Required Field

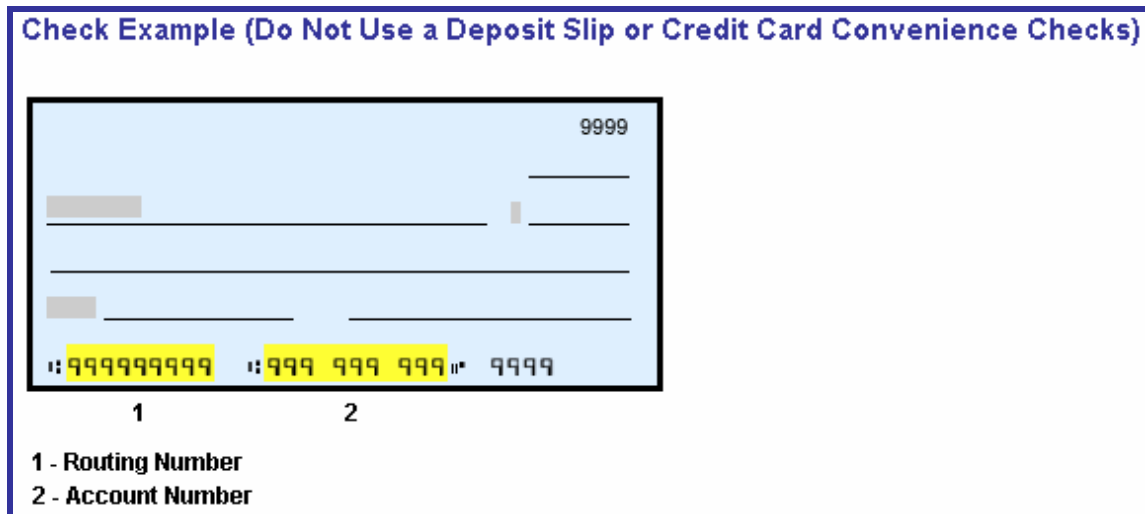
- Enter information in the fields as needed.
 - NOTE:** Fields marked with an * are required fields.
- Click on [Direct Deposit Help](#) for more information. Click on to return to the **Change Direct Deposit** page.

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.

Field Name	Instruction
Account Type	Select whether this is a 'Checking' or a 'Savings' account.
Deposit Type	Choose "Amount" if you want to select a Dollar Amount. Choose "Percent" if you want to select a percentage of the remaining net pay. Choose "Balance" if you want to select the balance of the remaining net pay.
Amount/Percent	If you selected Deposit Type = Amount, enter a Dollar amount here. If you selected Deposit Type = Percentage, enter a percentage here. If you selected Deposit Type = Balance, leave this field blank.
Routing Number and Account Number	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 "View Check Example" 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.
Deposit Order	The Direct Deposit feature will process the lowest Deposit first. So, 100 will be processed before 200, etc.

- 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 to return to the **Change Direct Deposit** page.



- Click on . The **Direct Deposit Save Confirmation** page displays.
- Verify The Save was successful. appears.
- Click on . This brings you back to the **Direct Deposit** page.
- Verify the **Direct Deposit Detail** information for the new account.

Reviewing, Adding, Changing or Discontinuing Your Voluntary Deductions

Reviewing Your Voluntary Deduction Information

1. Select **Self Service, Employee, Home, [Employee Home](#)**. The **Employee Home** page displays.
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](#)**.

Voluntary Deductions
Sample Employee
Board of Regents

Voluntary Deductions						
Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance
State Charitable Contribution	11/03/2006		Current	\$150.00		0.00

[Add Deduction](#)

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

Voluntary Deductions
Voluntary Deduction Detail
Sample Employee
Board of Regents

*Type of Deduction: State Charitable Contribution

*Check whether Deduction is a Flat Amount or Percent: Amount

*Enter Amount/Percent to be deducted: 150.00

Take deduction until I reach this Goal Amount:


*Enter Deduction Start Date: 11/03/2006

Enter Deduction Stop Date:

Current Balance: 0.00

- Click on **[Return to Voluntary Deductions](#)** to return to the **Voluntary Deductions** page.

Changing or Discontinuing Your Voluntary Deductions

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

Voluntary Deductions

Change Voluntary Deduction

Sample Employee
Board of Regents


***Type of Deduction:** State Charitable Contribution

***Check whether Deduction is a Flat Amount or Percent**

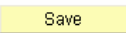
***Enter Amount/Percent to be deducted:**

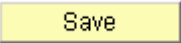


Take deduction until I reach this Goal Amount:

***Enter Deduction Start Date:** 11/03/2006

Enter Deduction Stop Date: 

Current Balance: 0.00



2. Enter the information in the fields as needed.
 - **NOTE:** Fields marked with an * are required fields.
3. Click on . The **Voluntary Deductions Save Confirmation** page displays.
4. Verify  The Save was successful. appears.
5. Click on . This brings you back to the **Change Voluntary Deduction** page.


Adding a New Voluntary Deduction

1. Click on . The **Add Voluntary Deduction** page displays.

Voluntary Deductions

Add 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: (example: 12/31/2000)

Enter Deduction Stop Date: (example: 12/31/2000)

Current Balance: 0.00

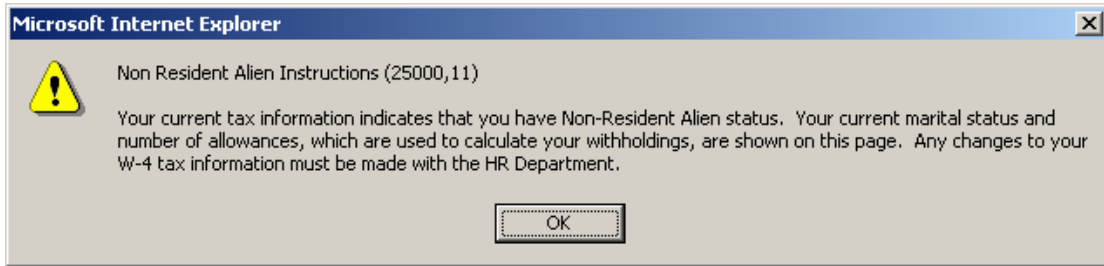
* Required Field


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 . The **Voluntary Deductions Save Confirmation** page displays.
4. Verify  The Save was successful. appears.
5. Click on . This brings you back to the **Voluntary Deductions** page.
6. Verify the **Voluntary Deductions** information for the new deduction.

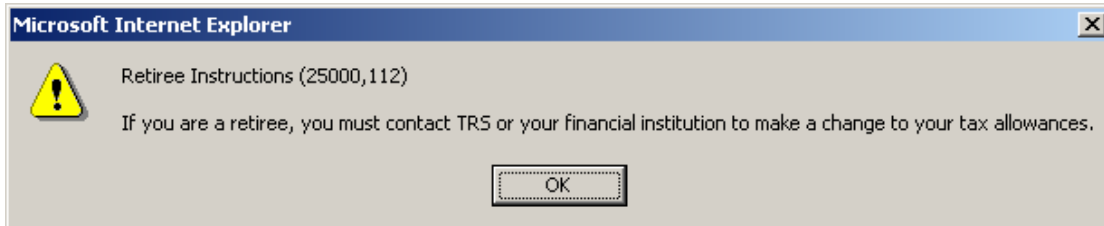
Reviewing or Changing Your Federal Tax Withholding (W-4) Information

Reviewing Your Federal Tax Withholding (W-4) Information

1. Select **Self Service, Employee, Home, [Employee Home](#)**. The **Employee Home** page displays.
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:



- Click on  to continue.
- **NOTE 3:** If you are a Retiree, you will receive the following message:



- Click on  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 G4 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**

W-4 Tax Data

Enter total number of Allowances you are claiming:

Enter Additional Amount, if any, you want withheld for each paycheck

Indicate Marital Status:
 Single Married

If married, but withholding at single rate, select Single status and check here.

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

Claim Exemption

I claim exemption from withholding for and I certify that I meet

BOTH of the following conditions for exemption:

>> Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability; AND

>> This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.

If you meet both conditions, check 'Exempt' here:

Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

Go To: [Employee Home](#)
[Payroll and Compensation Home](#)
[G-4 Tax Form](#)

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 . The **Verify Identity** page displays.

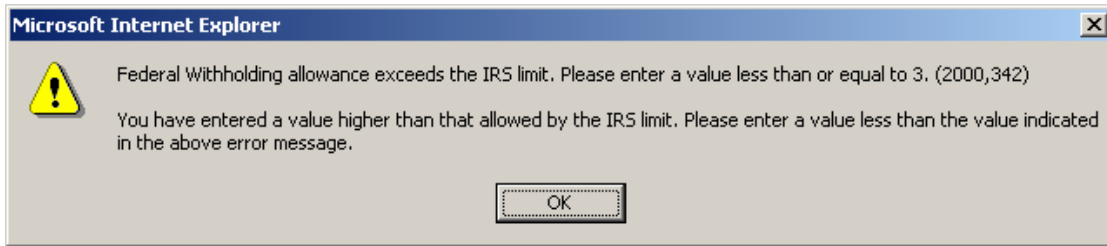
Verify Identity

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:

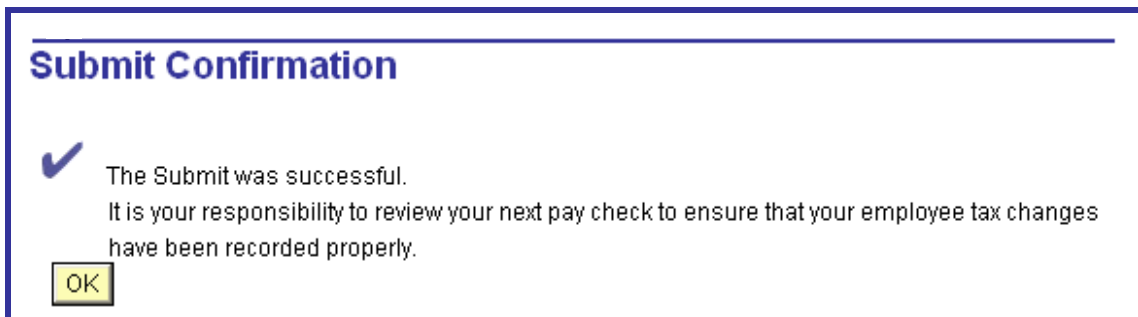
- **NOTE:** If you claim a number of exemptions that is higher than that allowed by the IRS because of a tax levy or lien, you will receive the following message:




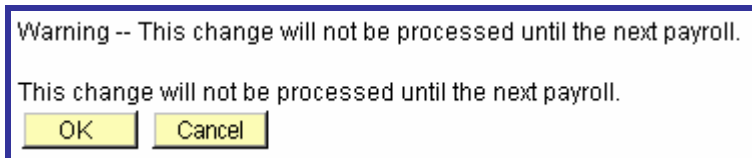
- Click on  to continue.

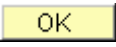

3. Enter your **Password** in the **Password** field.


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



5. Verify  The Submit was successful. appears.
- **NOTE:** If your Payroll office is currently processing a payroll, you will receive the following message:



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

6. Click on . 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.

☐ **Subject:** You submitted W-4 data via the Web on 2007-11-02.

From: noreply@usq.edu

Date: 9:15 AM

To:

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

1. Select **Self Service, Employee, Home, [Employee Home](#)**. The **Employee Home** page displays.
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](#)**.

W-2 Reissue Request

Sample Employee Social Security #: [View details](#)

Home Address

1234 Self Service Lane
Anywhere GA 30999

Mailing Address

1234 Self Service Ave
Anywhere GA 30999


W-2 Reissue Request


*W2 Request for year:

Select where you want your W-2 delivered:

[Submit](#)

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.

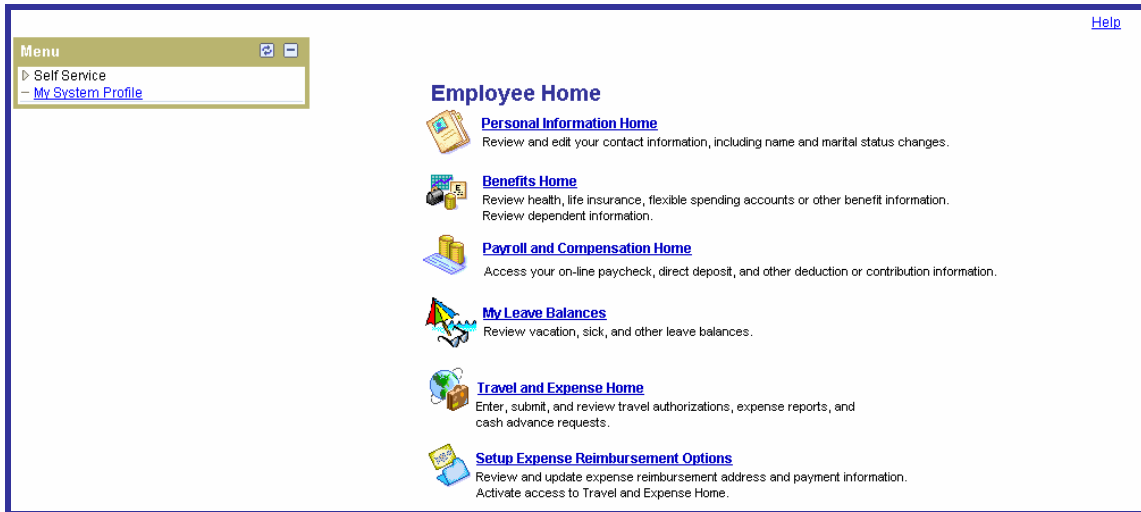
8. Verify  The Submit was successful. appears.

9. Click on . This brings you back to the **W-2 Reissue Request** page.

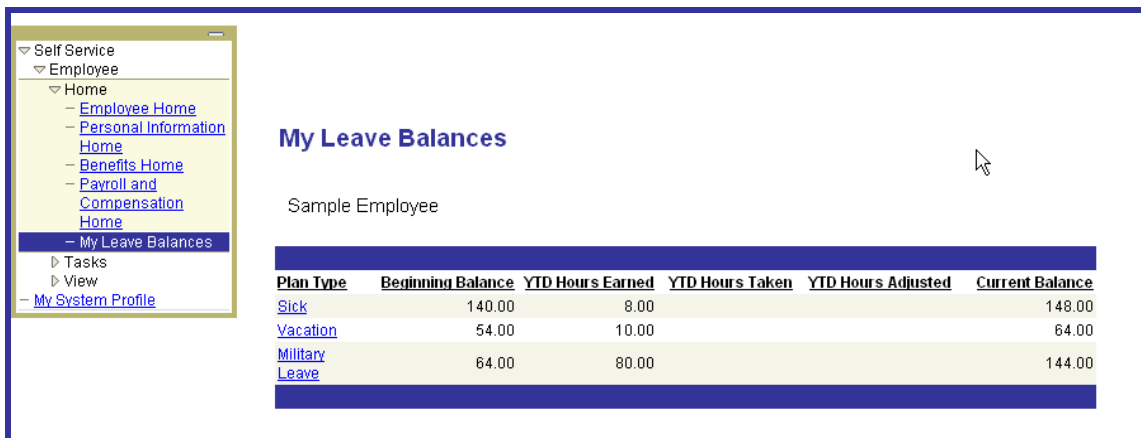
Your Leave Balance Information

Reviewing Your Leave Balances

1. Select **Self Service, Employee, Home, [Employee Home](#)**. The **Employee Home** page displays.



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.



- **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.

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.

Go To: [Employee Home](#)

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.

Accrual Date	Beginning Balance	YTD Hours Earned	YTD Hours Taken	YTD Hours Adjusted	Current Balance
08/29/2007		144.00			144.00
09/26/2007		144.00	20.00		124.00
10/24/2007		144.00	40.00		104.00
11/19/2007		144.00	60.00		84.00
12/17/2007		144.00	80.00		64.00
01/31/2008	64.00	80.00			144.00

- **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.

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.

[Return to Leave Balances](#)

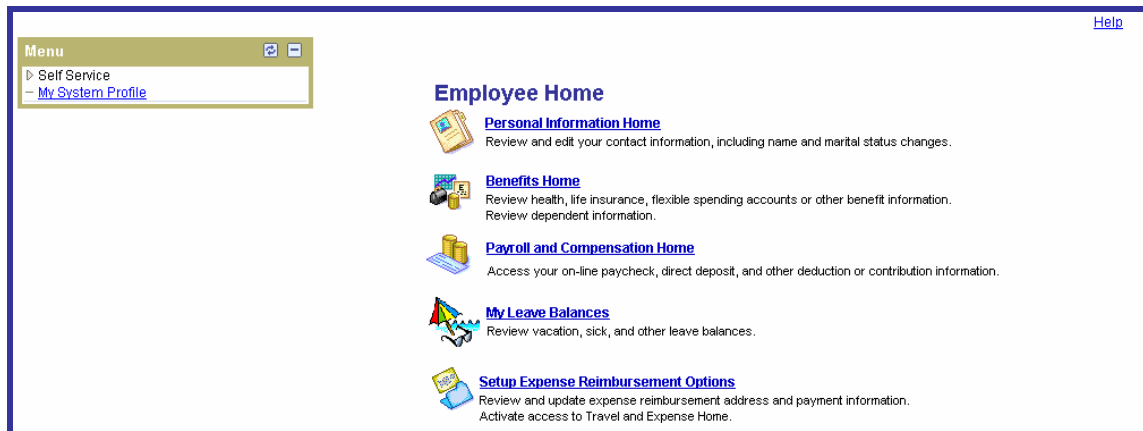
4. Click on the **Return to Leave Balances** link to return to the **Your Leave Balances** page. There you can select another Leave Plan to review that balance.
5. Click on the **Employee Home** link to return to the **Employee Home** page.

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.

1. Select **Self Service, Employee, Home, [Employee Home](#)**. The **Employee Home** page displays.



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.

Enter Network Password

Please type your user name and password.

Site: upk.dev.gafirst.usg.edu


Realm: myrealm

User Name:

Password:

Save this password in your password list

OK Cancel

- Enter the following:
 - User Name: **bor_upk**
 - Password: **upkuser!**
- Click on . The **UPK Players for Expenses and eProcurement End Users** page displays.

UPK Players for Expenses and eProcurement End Users

Click on the appropriate link to access the UPK Player for your role. You must use Internet Explorer to access the player.

Travel & Expenses

[Employee Setup and Maintenance](#)

[Travelers](#)

[Approvers – Reviewers](#)

[AP Auditor](#)

- Click on **Employee Setup and Maintenance** under **Travel & Expenses**. The UPK Player for the Travel & Expenses (EU) – Employee Setup and Maintenance chapter displays.

User Productivity Kit - PeopleSoft 8 - Microsoft Internet Explorer

User Productivity Kit

Playback Mode Preferences | Help | Close

See It! Try It! Know It? Do It!

Outline



Search GO

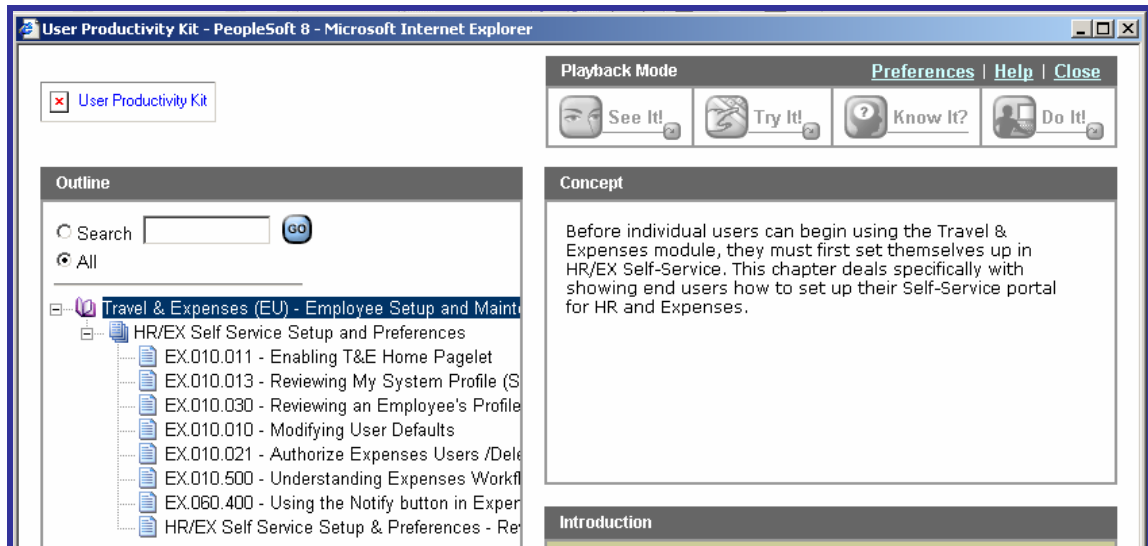
All

Travel & Expenses (EU) - Employee Setup and Maint

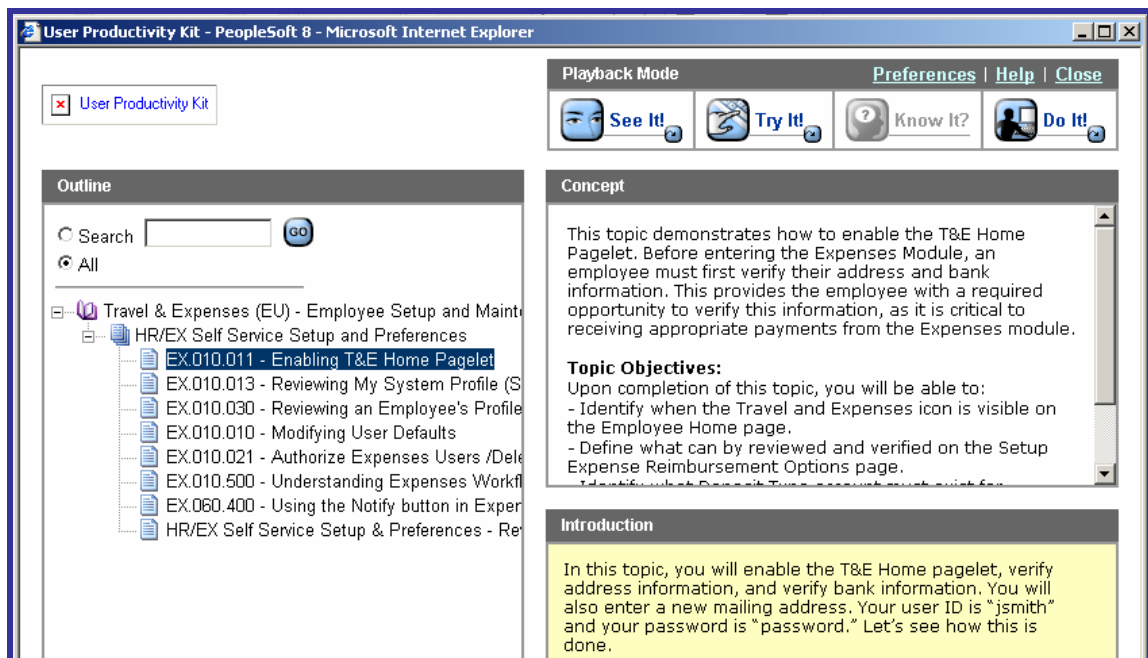
Concept

Before individual users can begin using the Travel & Expenses module, they must first set themselves up in HR/EX Self-Service. This chapter deals specifically with showing end users how to set up their Self-Service portal for HR and Expenses.

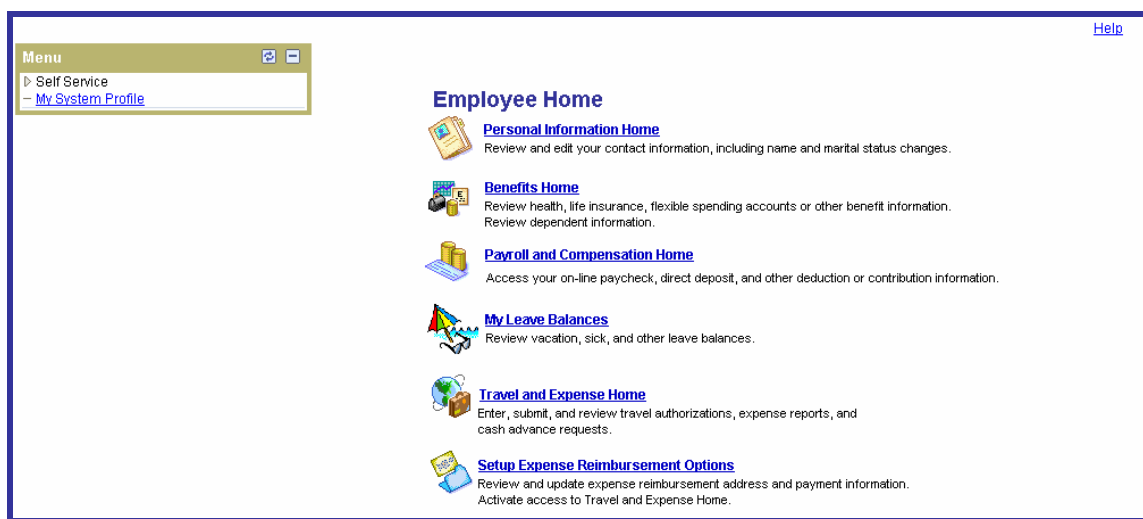
- Click on the  to expand the **Travel & Expenses (EU) – Employee Setup and Maintenance** chapter. The **HR/EX Self Service Setup and Preferences** lesson displays.
- Click on the  to expand the **HR/EX Self Service Setup and Preferences** lesson. The UPK Players for the **HR/EX Self Service Setup and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

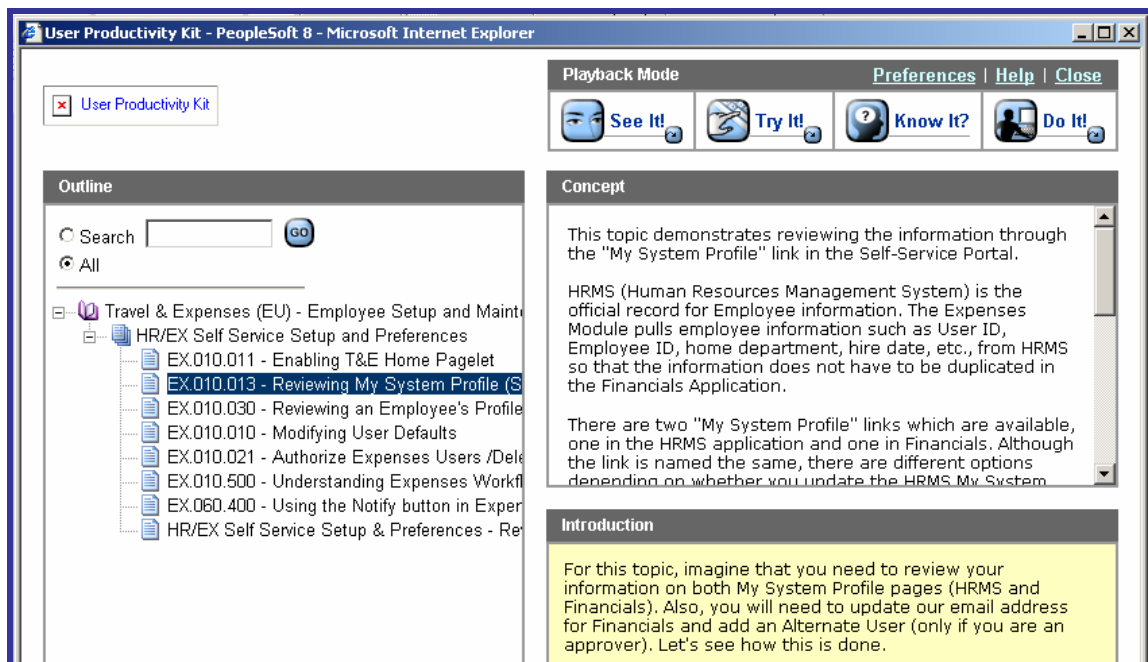
1. Click on [Travel and Expense Home](#). The **Travel and Expense Home** page displays.
 - **NOTE:** You can also select **Self Service, Employee, Home, [Travel and Expense Home](#)**. The **Travel and Expense Home** page displays.



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:

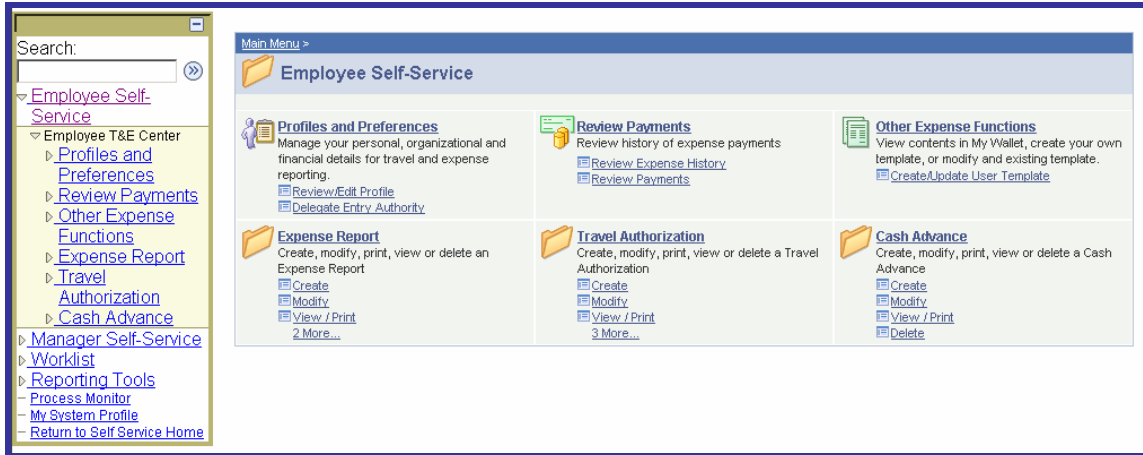
- Passwords in both Financials and HRMS will be in sync between the two systems.
- Password help will not work in Financials. You must use this in HRMS.
- The email address you add in HRMS Self Service will sync to Financials. However, if you add a different email address in Financials, it will **not**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

Click on the appropriate link to access the UPK Player for your role. You must use Internet Explorer to access the player.

Travel & Expenses

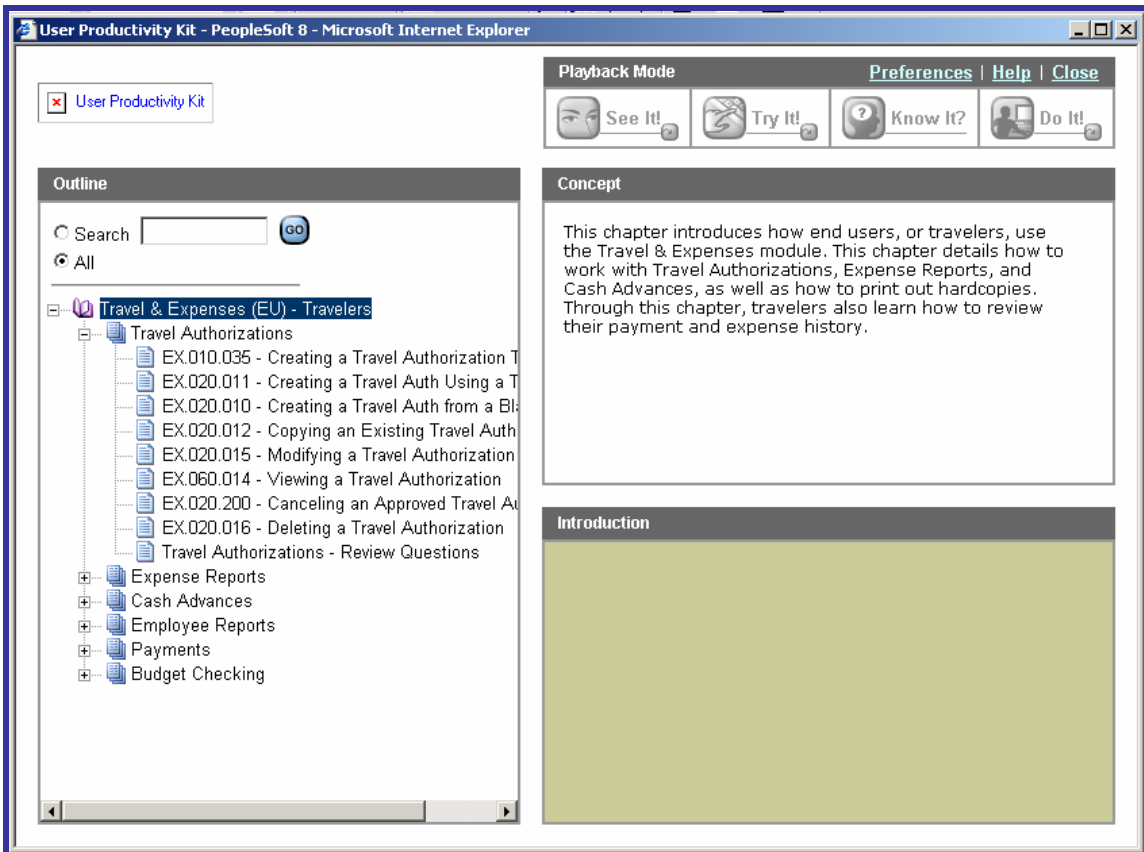
[Employee Setup and Maintenance](#)

[Travelers](#)

[Approvers – Reviewers](#)

[AP Auditor](#)

- 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.