The Employee Portal Employee User Guide

Introduction

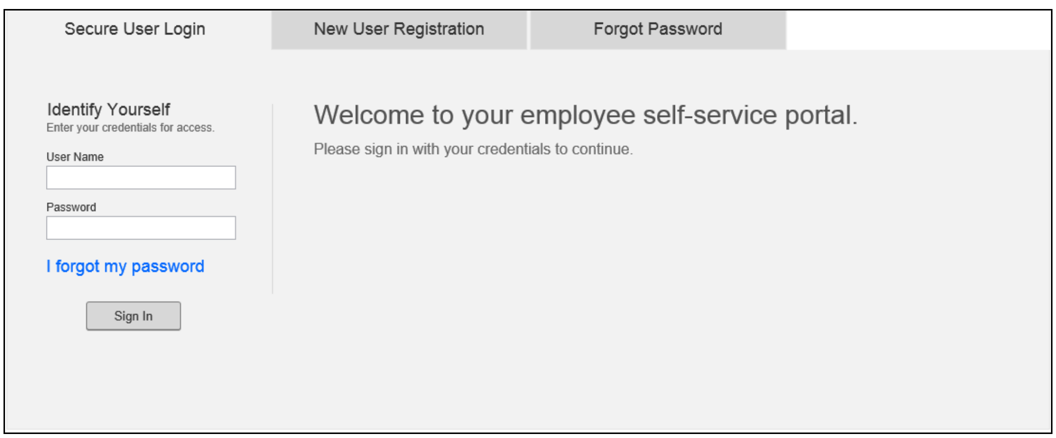
The Employee Portal is a Web-based portal offering employees access to their payroll information via the Internet. Through the portal, employees can

- view and print payroll vouchers and W-2s
- access their demographic data
- request time off, and
- view paid time-off balances.

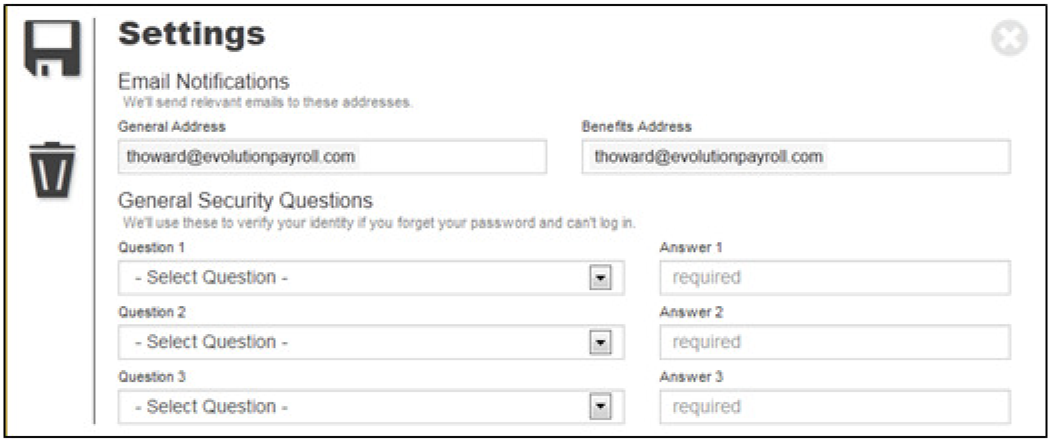
The Employee Portal can be used on tablets and mobile devices.

Initial Login to the Employee Portal

1. Open a Web browser and enter the URL provided by iSystems for access to the Employee Portal.
   Result: The Login screen opens to the Secure User Login tab.



2. Enter the Username and Password assigned by the Administrator.
3. Click **Sign In.**
   Result: The Settings screen opens, on which are Security Questions the user must set up for future login.

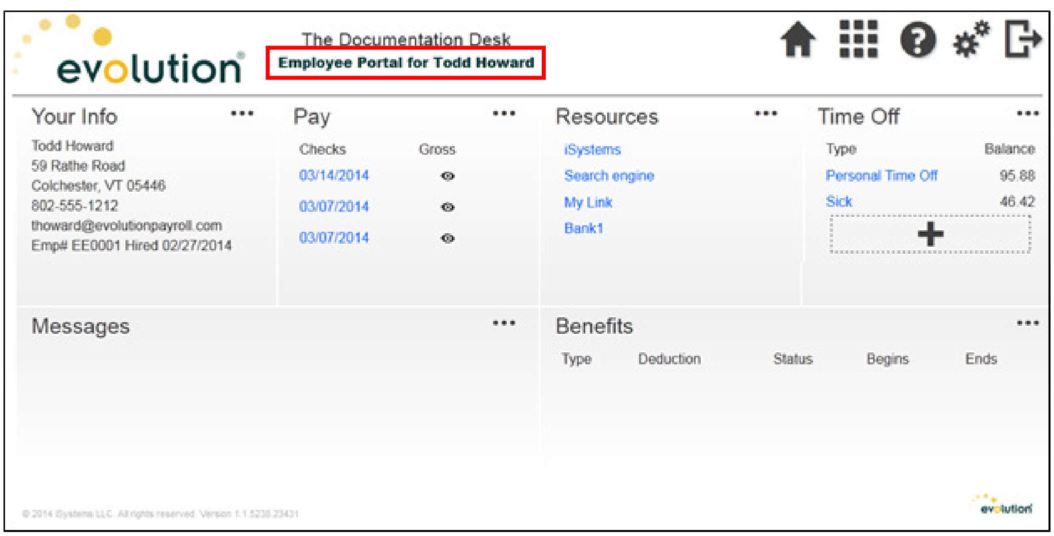


4. Select three General Security Questions from the dropdown lists and enter the answers on the right.
5. Select two Extra Security Questions from the dropdown lists and enter the answers on the right.
6. Click the **Save** button.

   Result: the Employee Portal Dashboard opens.

Note: The next time the user logs in, two of the pre-selected security questions will be displayed, that the user will need to answer.

Dashboard

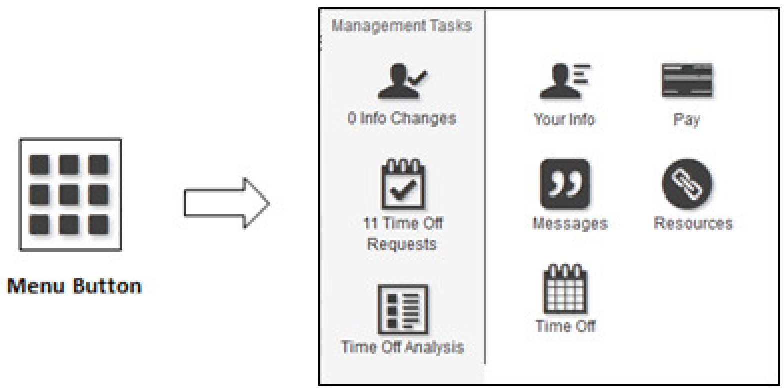


Employee Identification
The employees' first and last name displays in the header when logged into the portal.

Navigation Buttons
There are several buttons in the upper right corner of the Dashboard used to navigate the application.

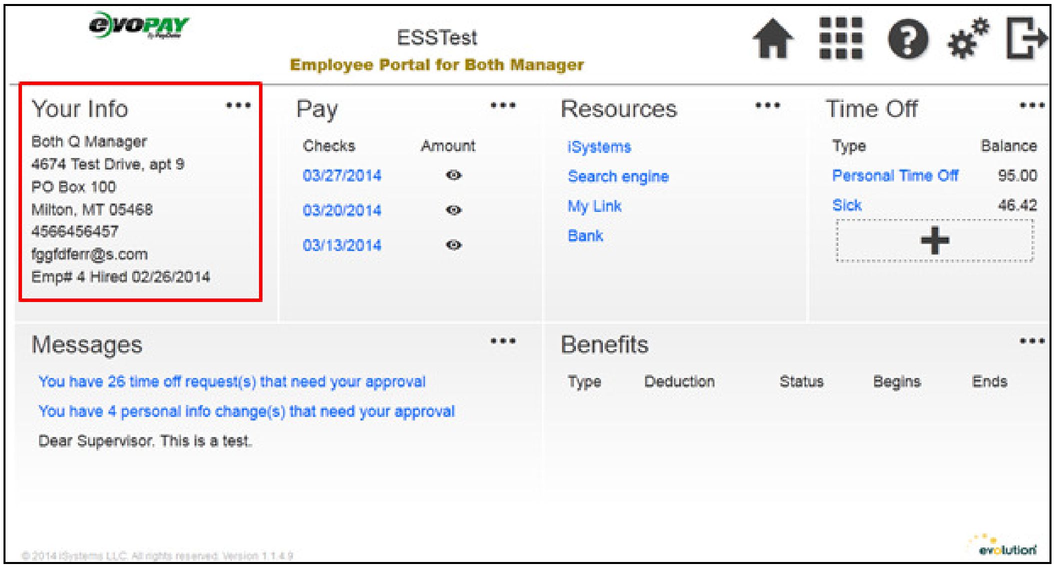
Home Button

1. Click the **Home** button from anywhere in the application to be brought back to the Dashboard.

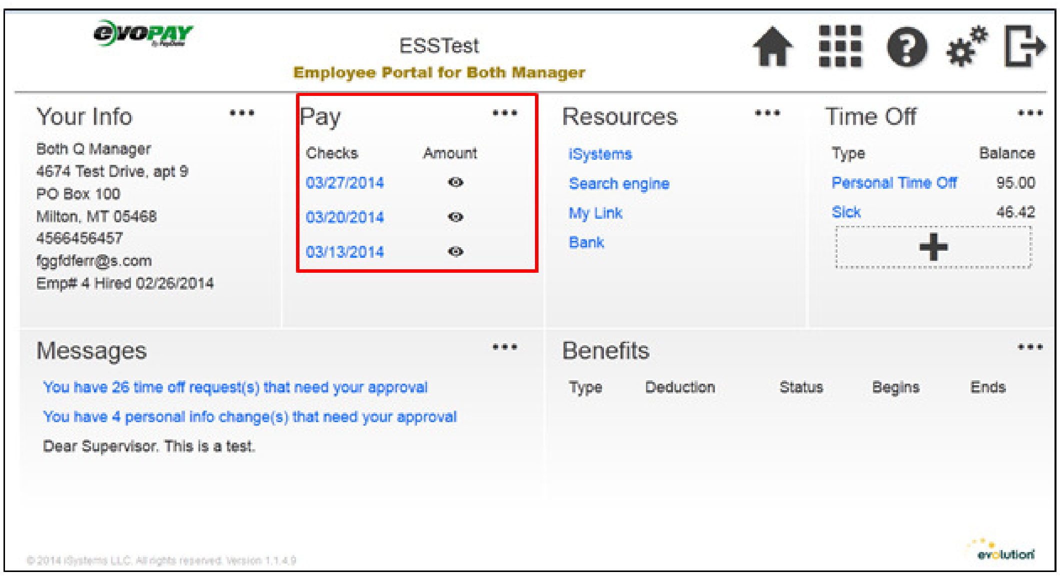


2. Click the **Menu** button to access additional menu buttons to the screens on which to enter information to be displayed on the Dashboard.

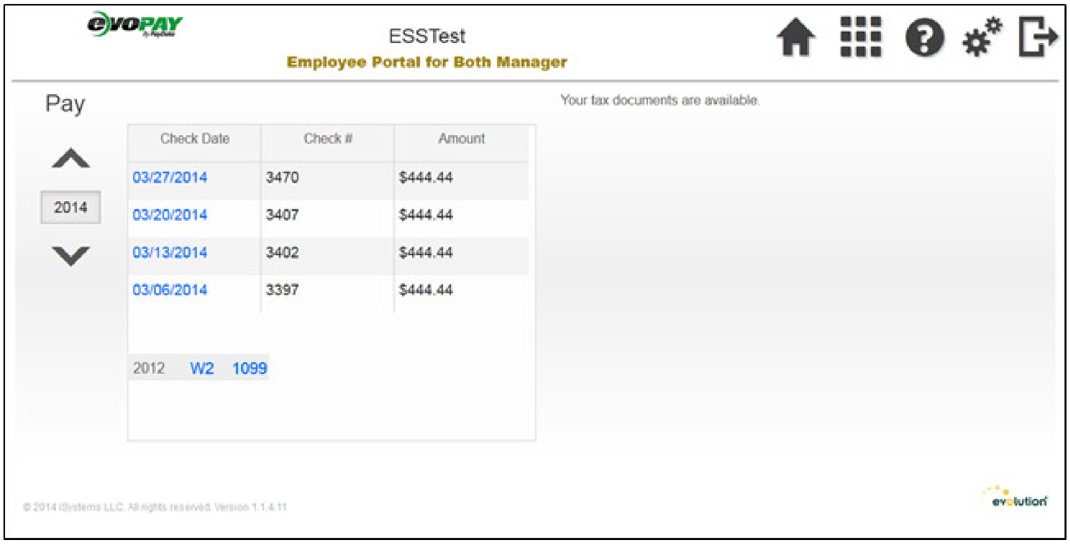
3. Click the **Your Info** button to view the information displayed in the Your Info section on the Dashboard from wherever you are in the application. The information on this screen can only be edited by the manager.



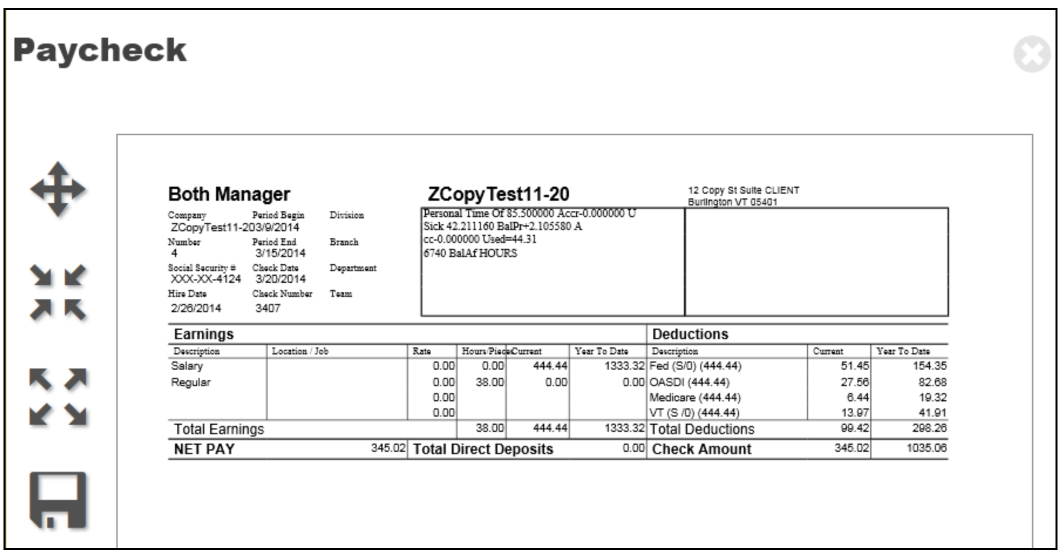
4. Click the **Pay** button to view the information displayed in the Pay section on the Dashboard, from wherever you are in the application.



5. Select the year if applicable, to see previous years' checks.

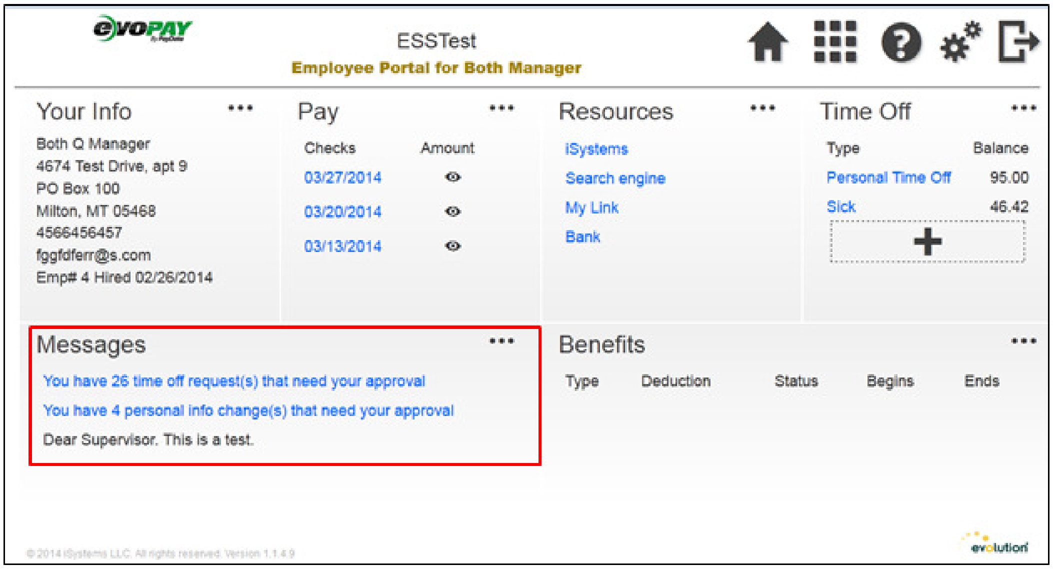


6. The most recent W-2 and 1099 forms are also available and can be clicked to view.
7. Click the **check date** to view the check stub for that payment date.

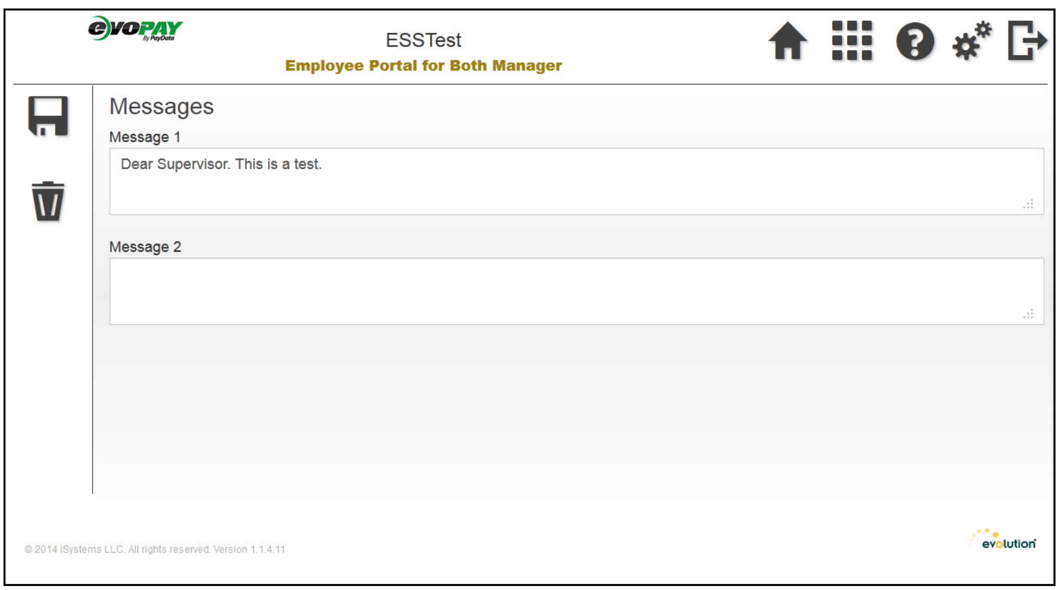


8. Click the **Messages** button to view messages displayed in that section on the Dashboard, sent to the user by the Group Manager. The messages are displayed as links that direct the user to the item where action is required.

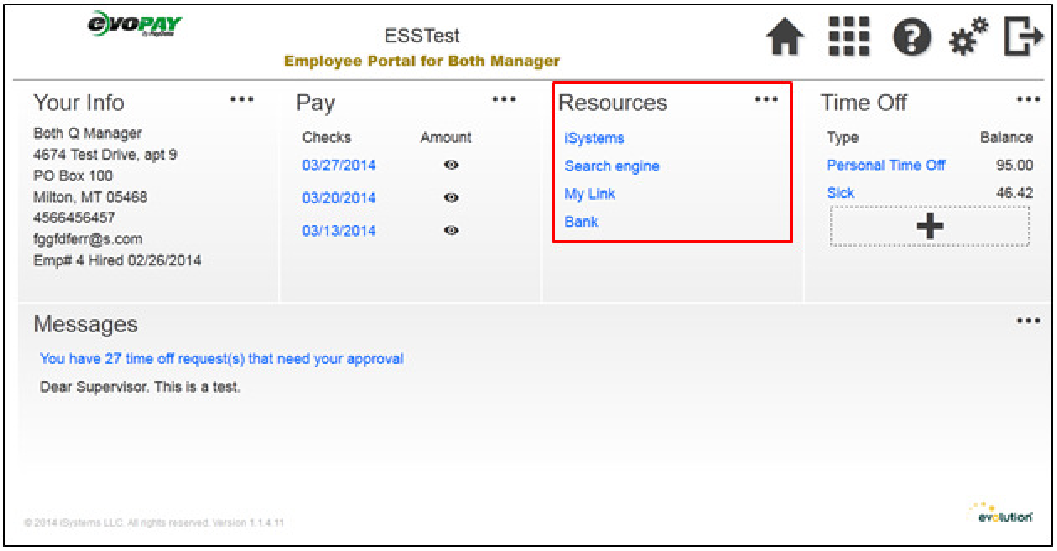
Managers also receive system messages seen on the Dashboard regarding items needing approval

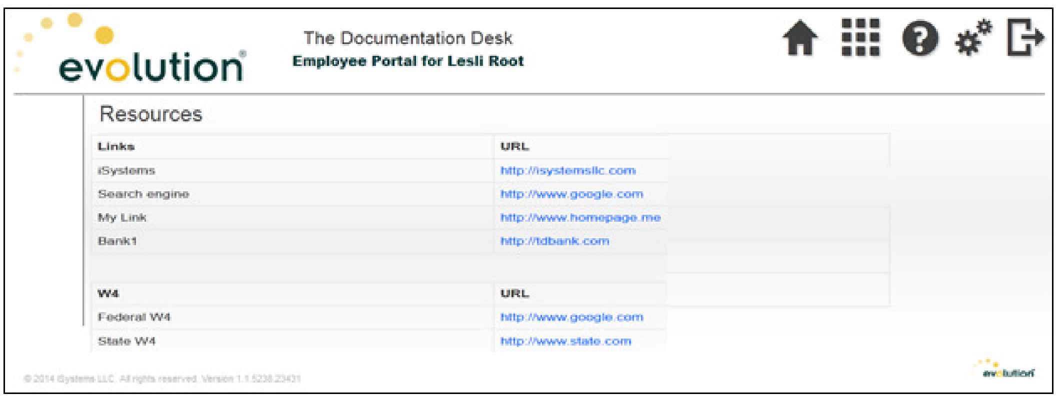


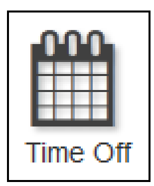
Messages are displayed on the Dashboard, and also viewed by clicking the **Messages** button above. The screen below has fields in which managers may have entered text. This page is read only for users who are not managers.



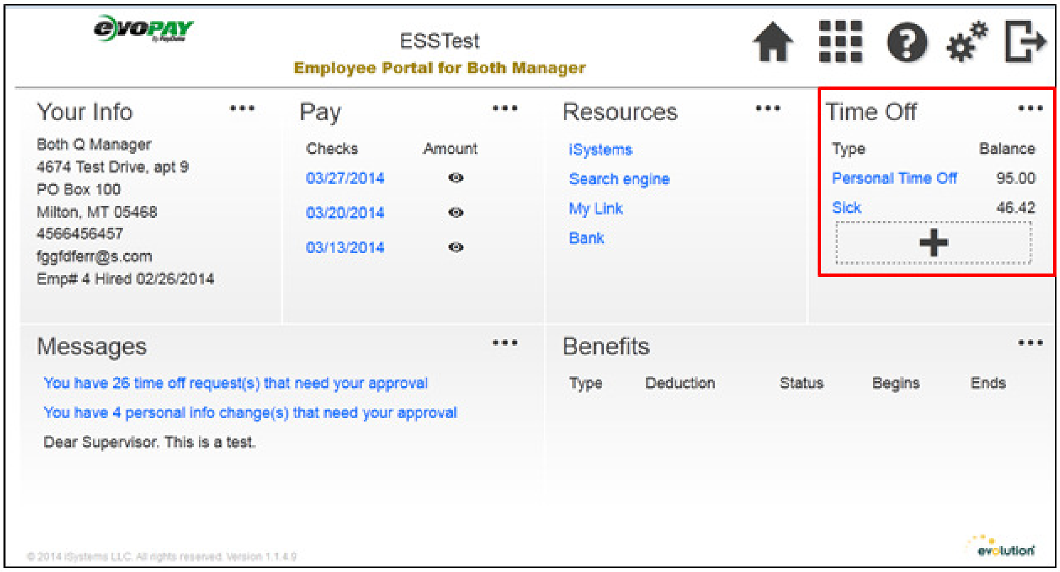
9. Click the **Resources** button to view links displayed in the Resources section on the Dashboard. These links are pre-defined by the Group Manager.







10. Click the **Time Off** button to view time off balances also displayed in the Time Off section on the Dashboard.



Submitting a Time Off Request

To submit a Time Off Request

1. Click the large **Plus** sign at the bottom of the Time Off section on the Dashboard.

   The Time Off Request screen opens:

2. Select the type of Time Off Request being submitted (Personal time, Sick time, etc.)
3. Select the **Start Date** and **End Date** of the time period.

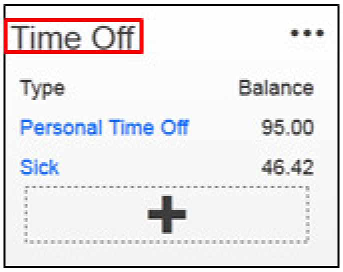
Once the dates are entered, the days are listed in the list on the right, where the hours can be edited as needed. Each date is listed on a separate line and totalled at the bottom.

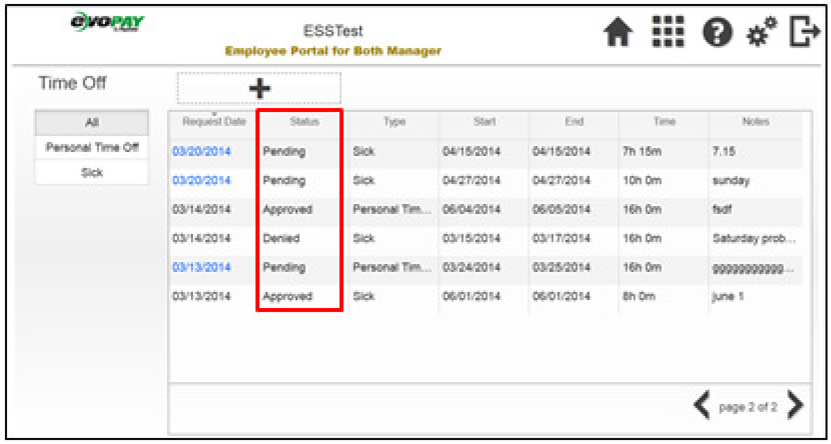
4. Enter the **Hours per Day** requested.
5. Select the **Include weekends** checkbox if the time request includes weekend days that would normally be worked.
6. Enter any notes if applicable (optional).
7. Edit hours on the right side of the screen, if applicable.
8. Click the **Save** button to submit for approval.

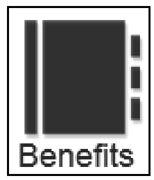
   Result: The manager receives a message, or your request is added to the total number of requests awaiting approval.

To view the status of Time Off Requests,

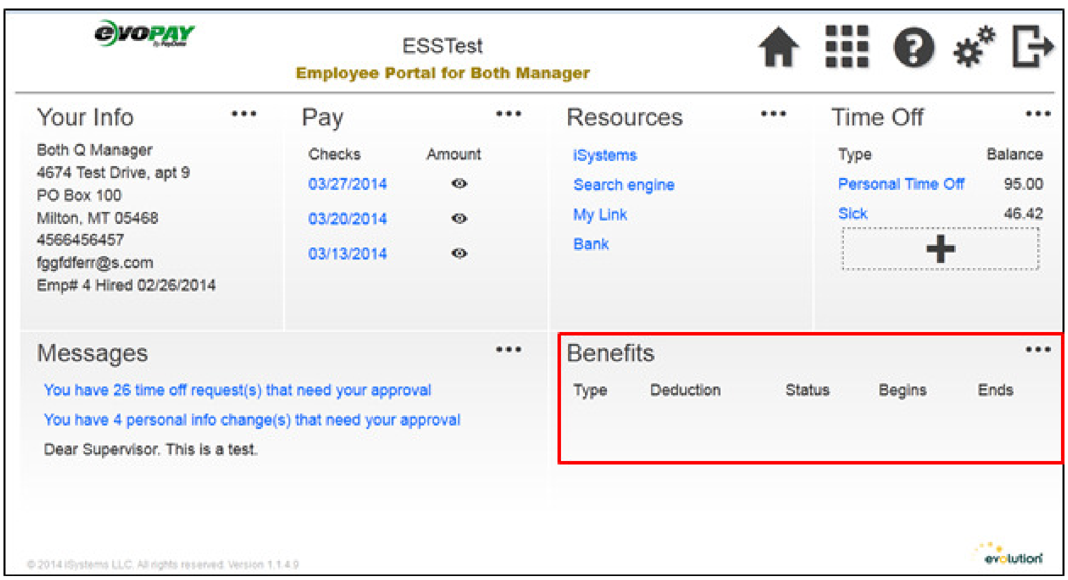
9. Click **Time Off** on the Dashboard.





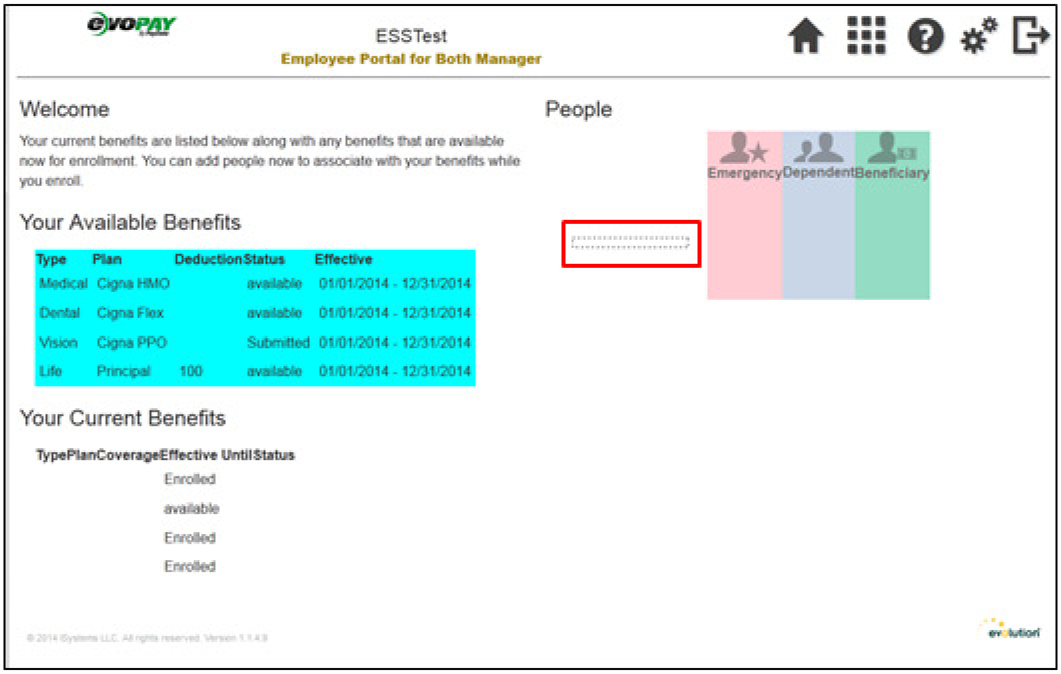


10. Click the **Benefits** button to view links displayed in the Benefits section on the Dashboard.

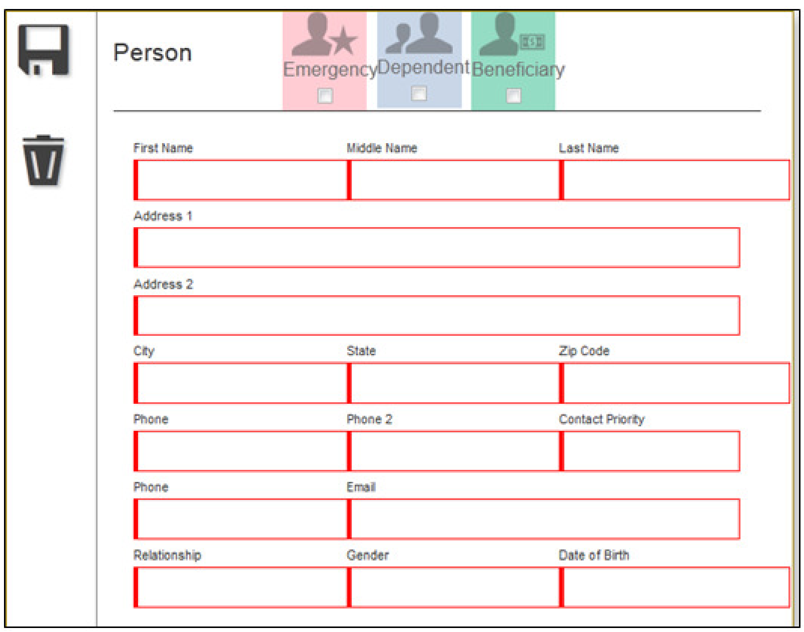


Result: The Available Benefits screen opens, on which benefits information can be viewed.

11. In addition, Emergency Contact, Dependant, and Beneficiary information can be added or edited here.



12. Click the blank box to the left of the Emergency / Dependent / Beneficiary section.
13. The Person screen opens where you can add an Emergency / Dependent / Beneficiary contact.



14. Select the checkbox below the person category being added.
15. Complete the information in the screen below.
16. Click the **Save**  **button.**