Employee Self Service (ESS) For Exempt/Salaried Employees Training Manual

Colleague® by ellucian.

Introduction to Employee Self-Service (ESS)

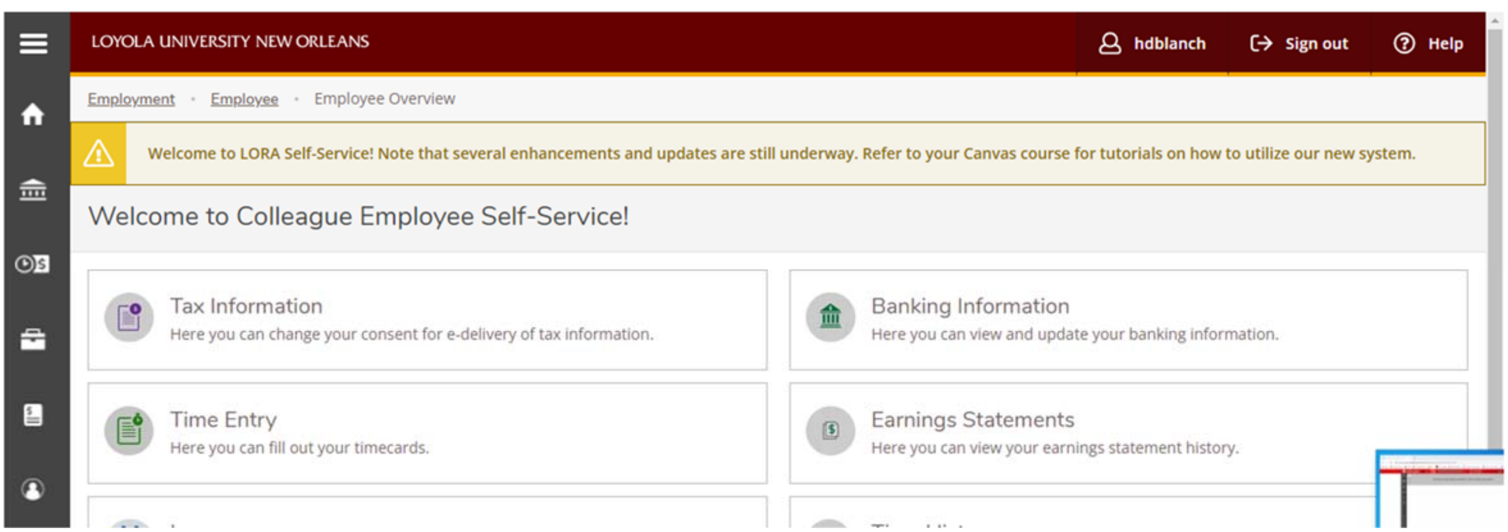
Employee Self-Service is a web-based portal that provides you with visibility to salary and benefit information contained within the Ellucian Colleague modules. The ability to view human resource and payroll data provides an excellent opportunity for you to ensure that the information is correct and kept up to date. The data visible to you includes current and past earnings statements (paycheck advice), current and past W-2's, direct deposit information, leave balances, and more. This is where you go to enter your time and where supervisors go to approve time.

One of the major advantages of this system is that the data is real-time data. In other words, when you view your information, the system pulls the most current information directly from the HR/Payroll system. If any of the information that you view within ESS is incorrect or you encounter questions, please contact the HR or Payroll office immediately.

Log in SSO

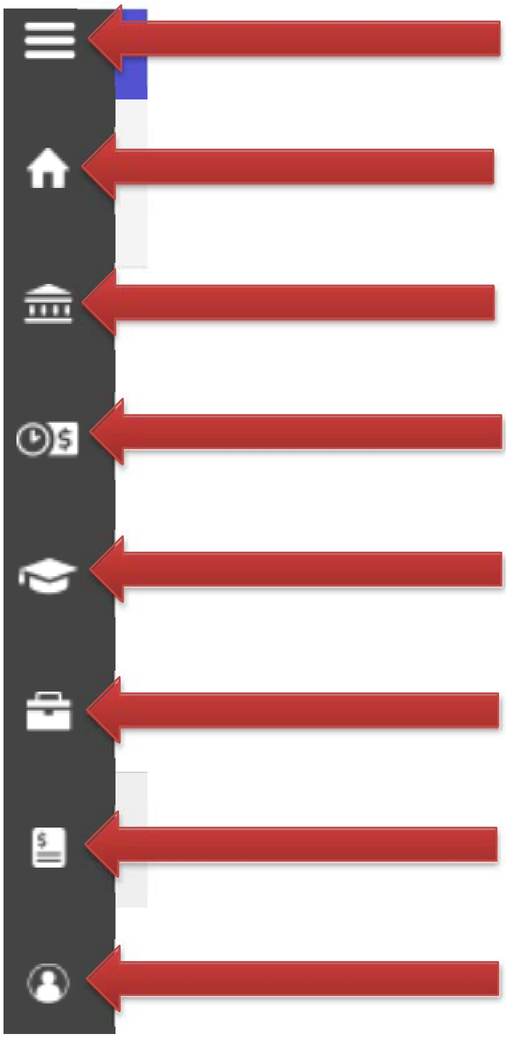
Choose this icon and login:

You will see a screen similar to this:



Please be sure to sign in and verify that you can access Self-Service.

This is the explanation of icons that appear along the left-hand side once you are logged in. You will only see the icons available for your position.



Click on this to expand the icons column. Click on it again will shrink the column.

Click on this to display the home page

Click on this to display the Finance information menu

Click on this to display the Employment menu

Click on this to display the Academic menu

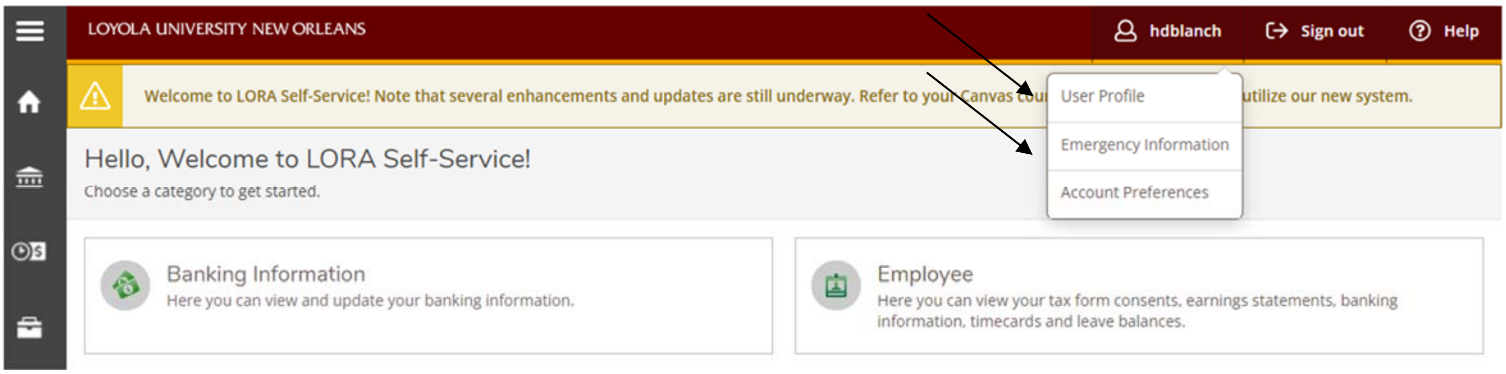
Click on this to display the Daily Work Menu

Click on this to display Vendor information

Click on this to display the User Options Menu

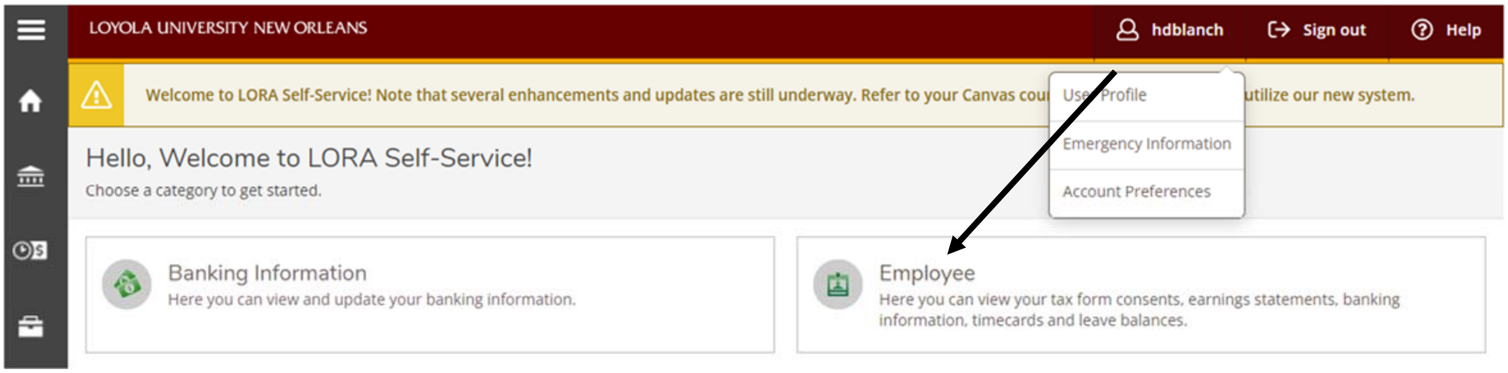
Managing Your User Profile

To access your user profile, click on your name in the upper right and then select "User Profile". It is very important that you keep the information in your User Profile current. You can view your address, phone number, and emergency contact information here, which can also be edited from this page.

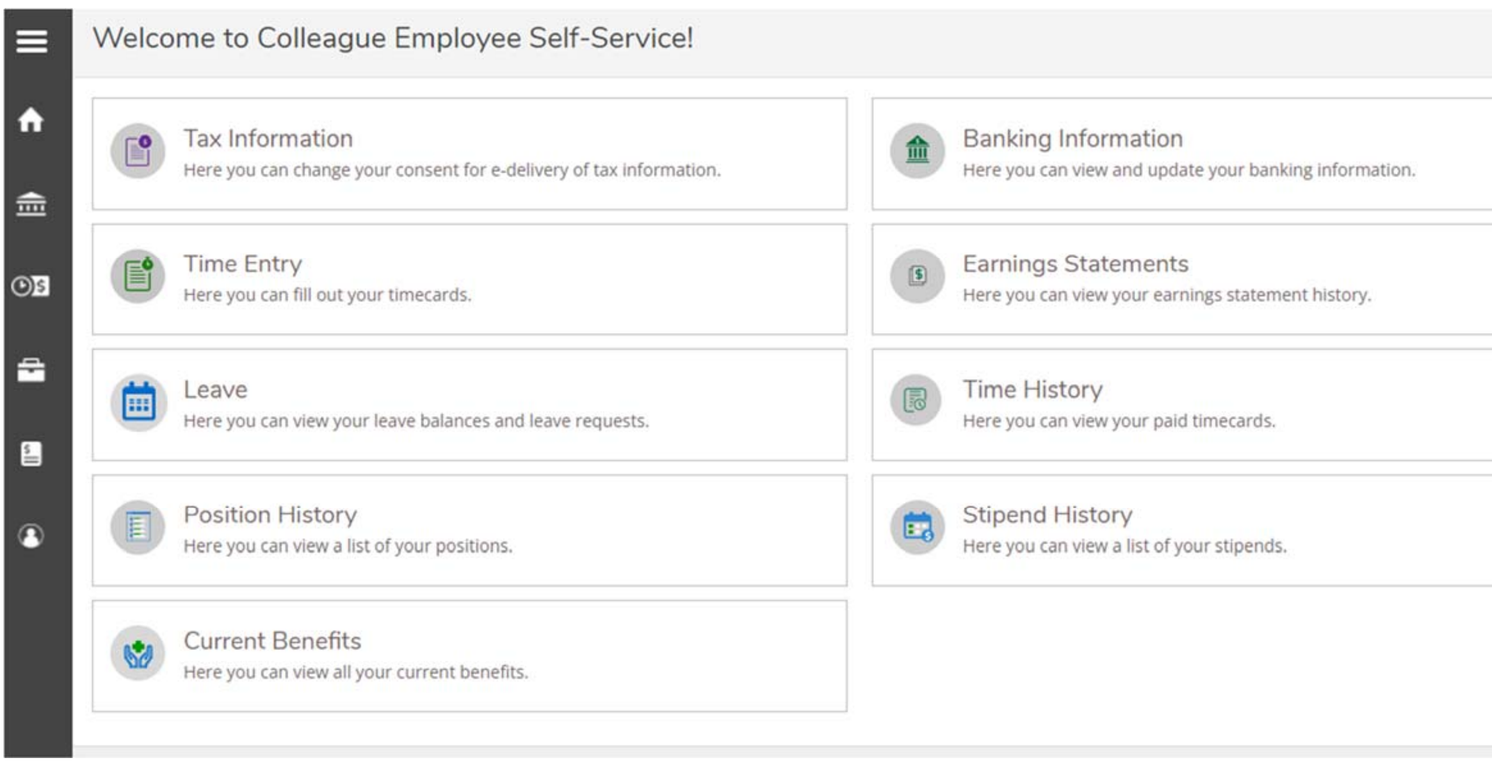


Accessing Employee Features within ESS

Click on the tab labeled "Employee".



This is where you will find all information related to Taxes, Time Entry, Earning Statements, Leave Balances, Leave Request, Banking Information, Position History, Stipend History, Total Compensation, Time History, Time Approval, Employee Proxy, Faculty Contracts, Current Benefits and Benefit Enrollment.



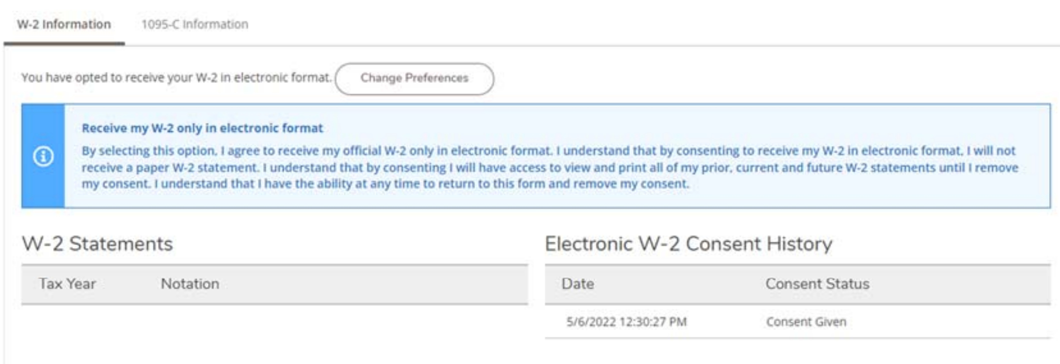
Employee Tax Information – W2’s/1095C’s

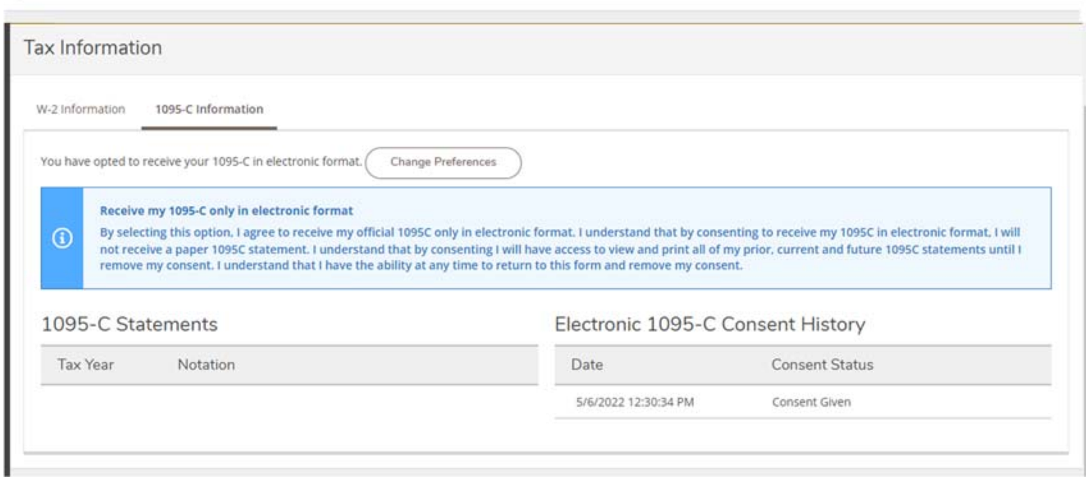
To view your Tax information, click on the “Tax Information” box.

In this area you can set your preference for receiving your W-2 and 1095C by clicking on the “Change Preferences” button. If you wish to receive them electronically then you can choose:

- Receive my W-2/1095C only in electronic format (Upgrade from EWS - **<u>Official</u>** Electronic W2 and 1095 forms; they may also be available to employees sooner than paper forms.)

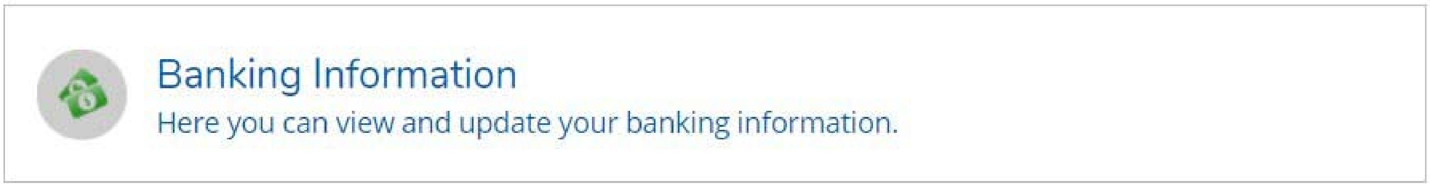
- You may also withhold consent and get your W-2/1095C on paper. The forms will be mailed on or before the IRS’ required date to the address on file when the form is printed. Duplicates may not be requested until three weeks after the mailing date.



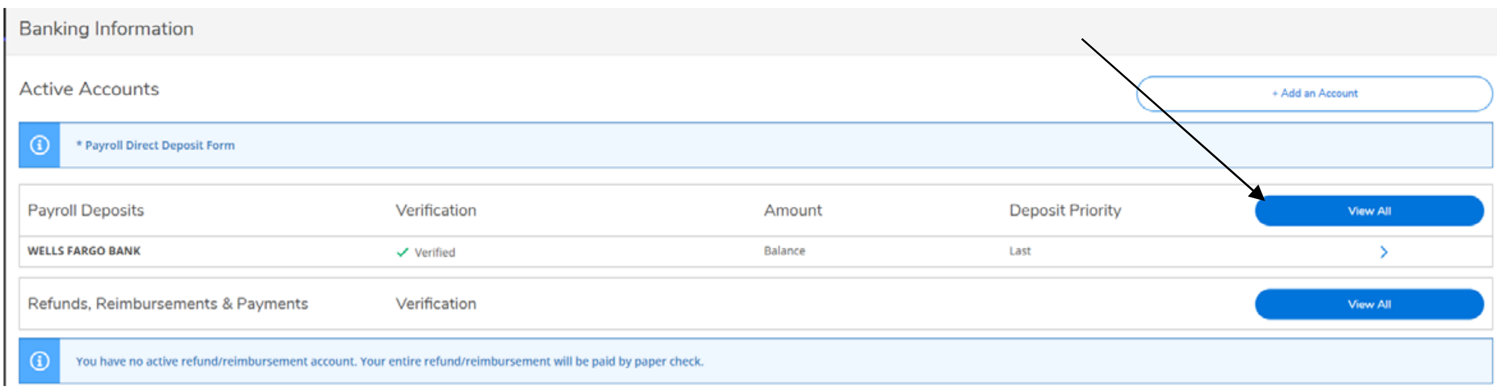


Employee Banking Information

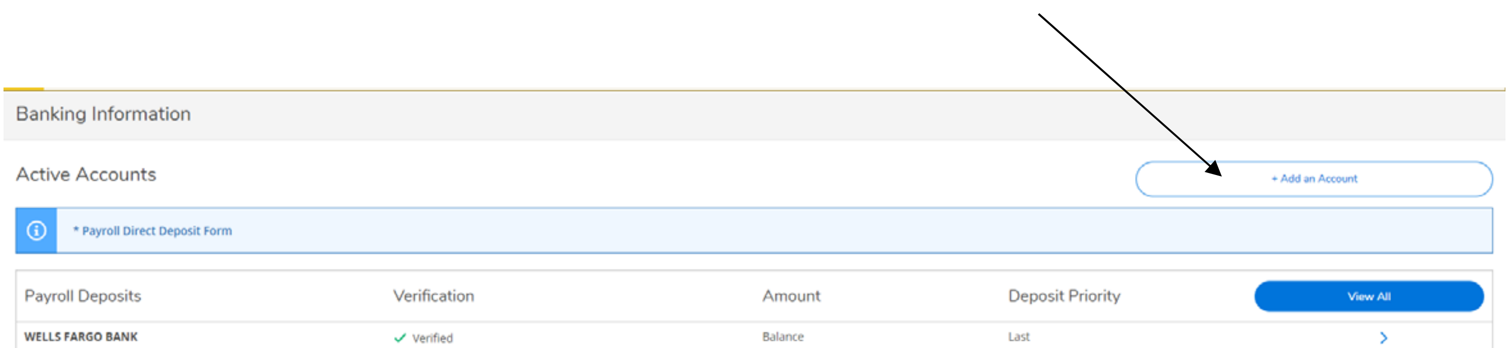
To view your banking information, click on the "Banking Information" box.



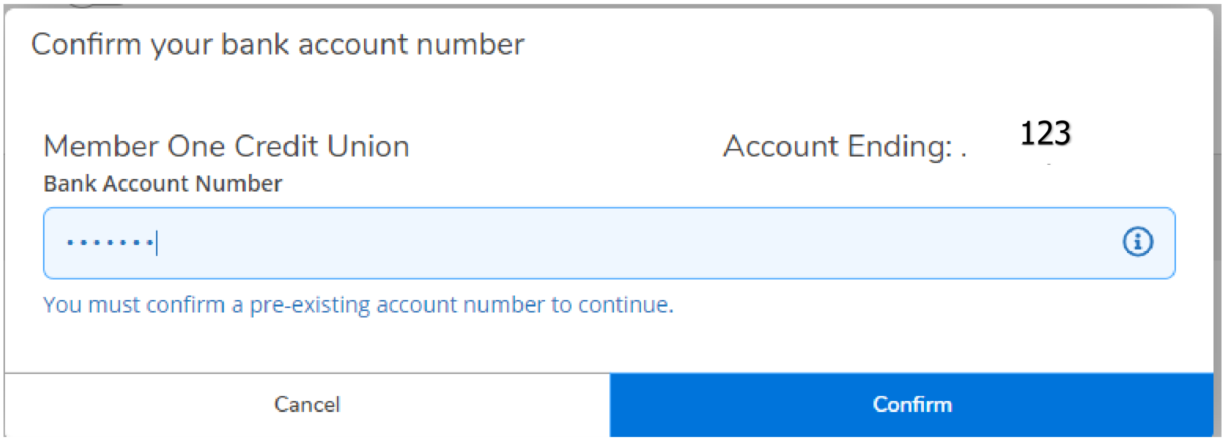
Please select "View All" to view your current banking information. Notice you can view both your payroll direct deposit accounts and direct deposit for checks processed through Accounts Payable (Refunds, Reimbursements & Payments).



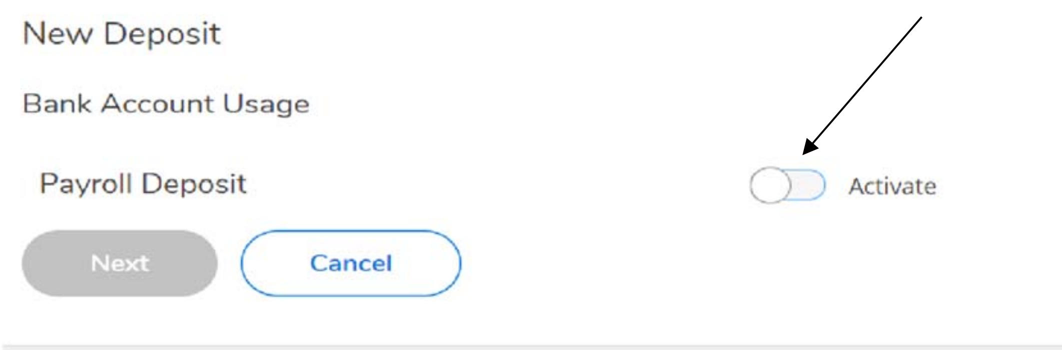
To make changes to your account, click the "+ add account" button.

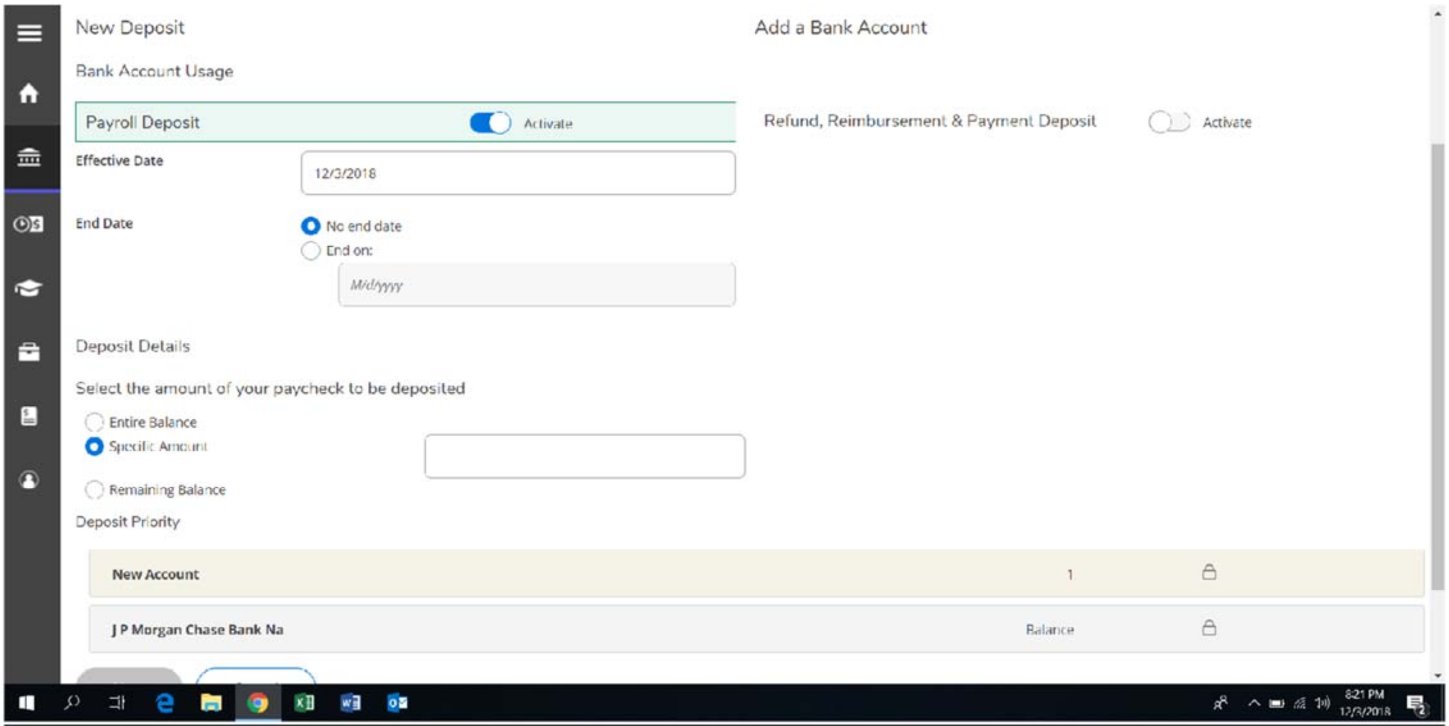


You will be required to confirm your existing bank account number at various stages of change requests. This feature is for your protection to safeguard against unauthorized changes.

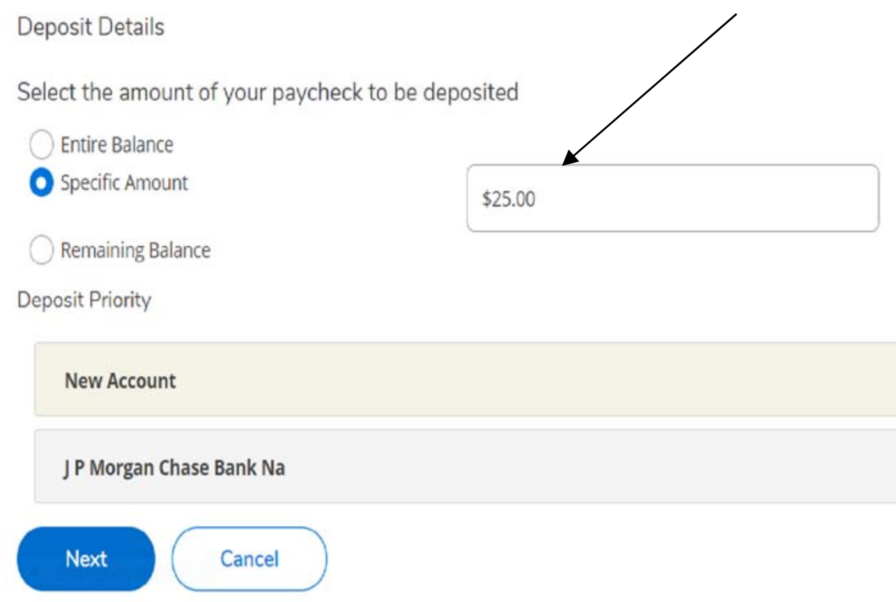


Slide the activation button and then enter the new or updated information as you need.

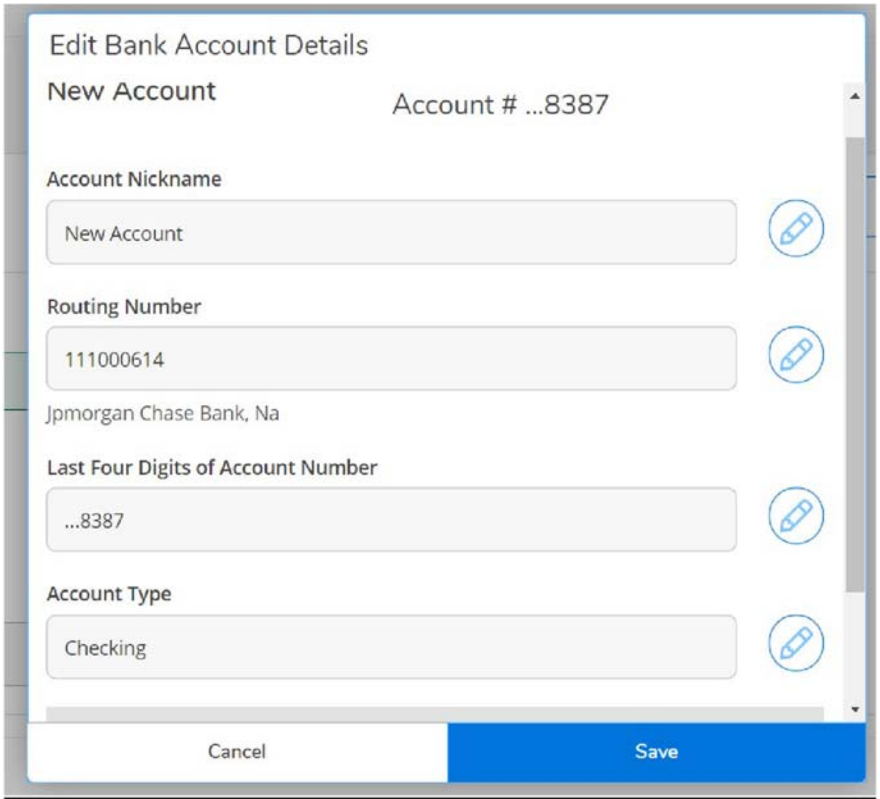




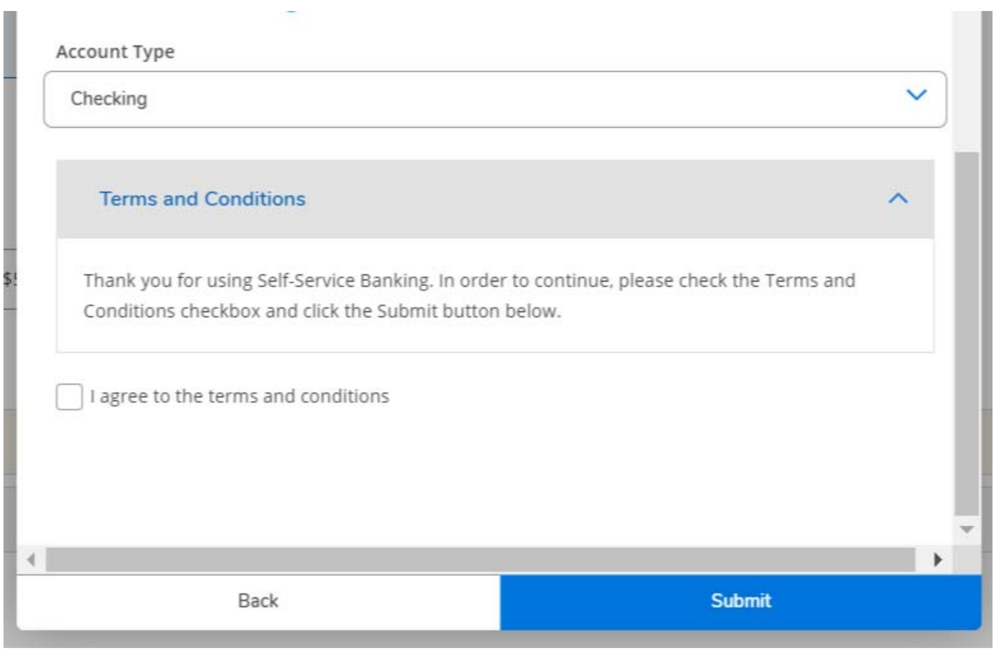
If you are depositing into multiple accounts and want to specify a specific dollar figure, enter as shown below. Then choose "Next".



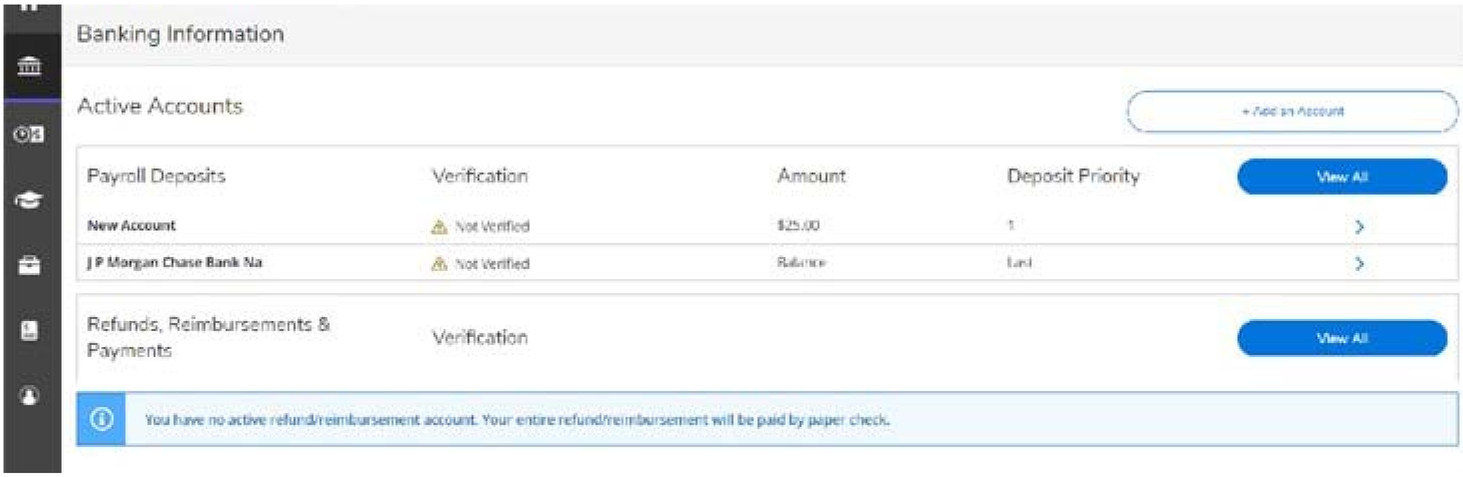
Add banking information in the prompts provided.



Accept the terms and conditions and save.



This is what it should look like after you make your updates.



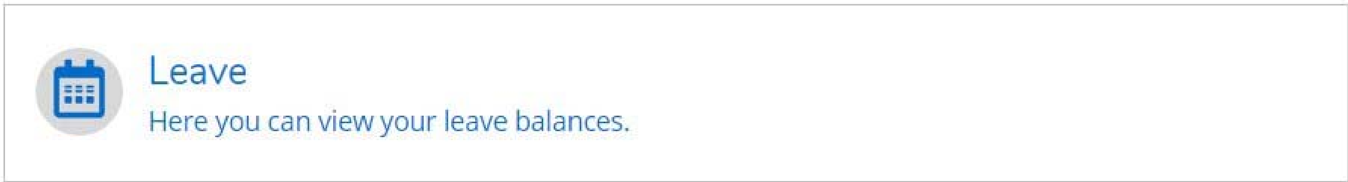
Employee Earning Statements

To access your Earning Statements in ESS, click on "Earning Statements"

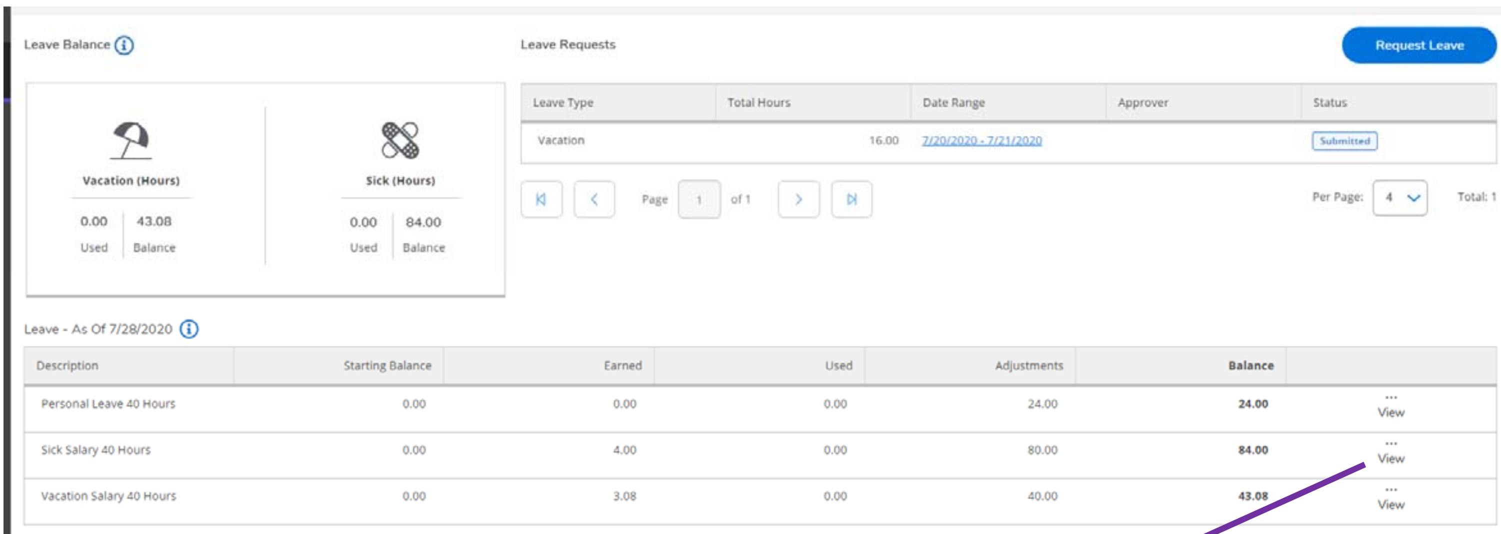
On this screen you can view your Earnings Statements, just click on the date of the one you want to view, and it will download. You can open to review or print it out.

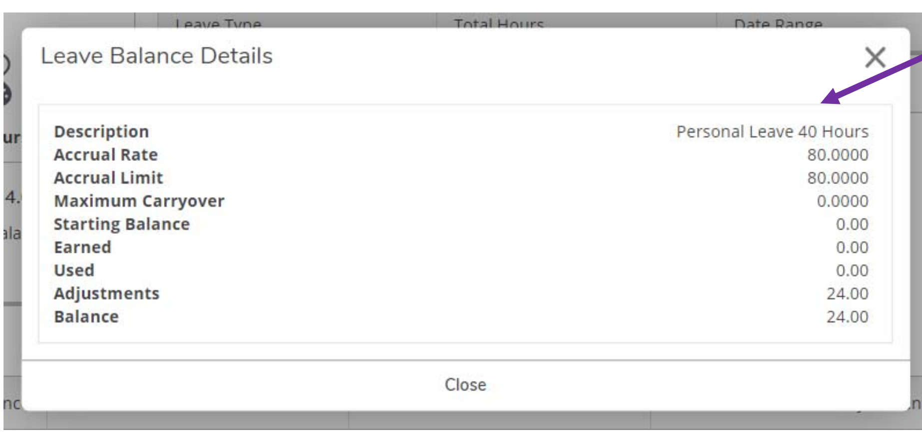
Employee Leave Balances/Requests

In this area you will be able to view your Vacation and Sick/Personal balances and make leave requests. Click on "Leave".

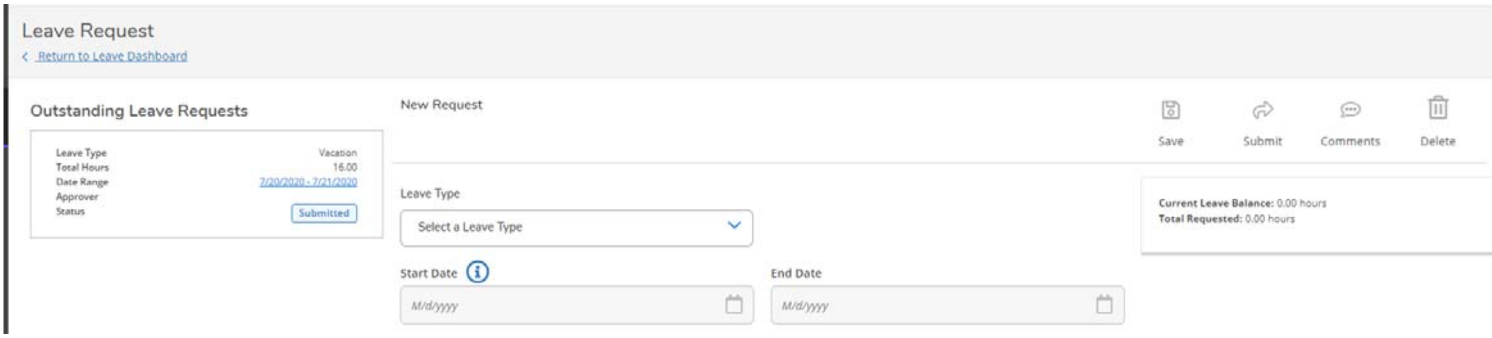


Notice you can view what you have used and your overall balance in the graphic at the top of the screen. Details about accrual earnings, usage and adjustments are found below. By clicking on "view" you can see additional details regarding your leave plans.

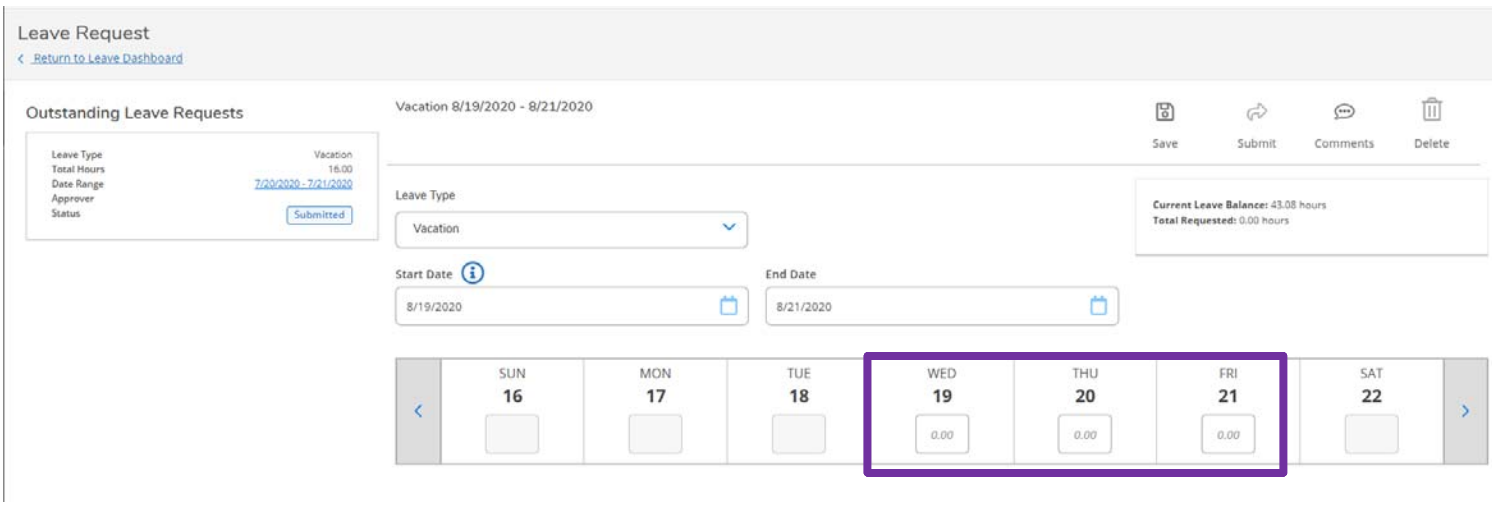




Employees can also request leave by clicking on the "Request Leave" button.



Next, select the type of leave and the start and end dates of the leave and a calendar will appear where you can enter the number of hours of leave you wish to take each day.



Once the leave has been "submitted" your outstanding leave requests will display on your dashboard. Once your supervisor "approves" the request, the "submitted" status will change to "approved."

Once the leave is approved, it will drop into your timecard.

Earn Type	Sun 3/21	Mon 3/22	Tue 3/23	Wed 3/24	Thu 3/25	Fri 3/26	Sat 3/27	Total
Work Schedule		8.00	8.00	8.00	8.00	8.00		40.00
Regular Earnings			8.00	8.00	8.00	8.00		32.00
Leave Request - Vacation		4.00						4.00
Vacation		4.00						4.00

Remove Vacation

If for some reason, you decide not to take the leave, you must remove the hours from the bottom field, and it will give you a Leave Mismatch warning. This is fine but you may want to add a comment for your supervisor and then submit your timecard.

Leave Request - Vacation		4.00						4.00
Vacation		⚠ *Leave mismatch*						0.00

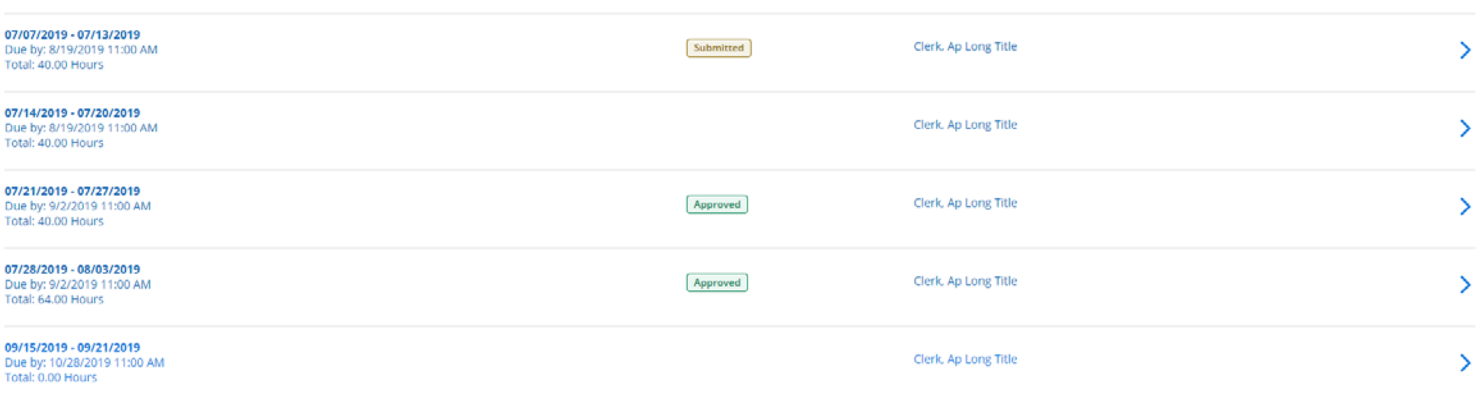
Remove Vacation

Employee Time Entry

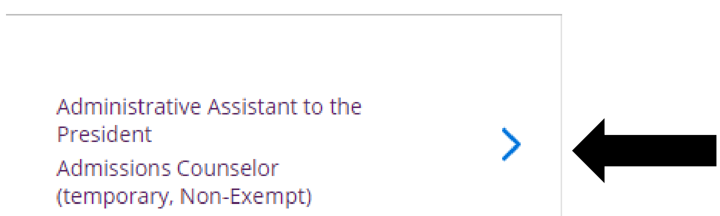
In the Time Entry area of ESS you can view, enter, make comments, and submit time worked. To start entering your time in ESS click on "Time Entry"

1. Select the pay period and click the blue arrow on the far right to open the timesheet.

   In this example, the person has one job.

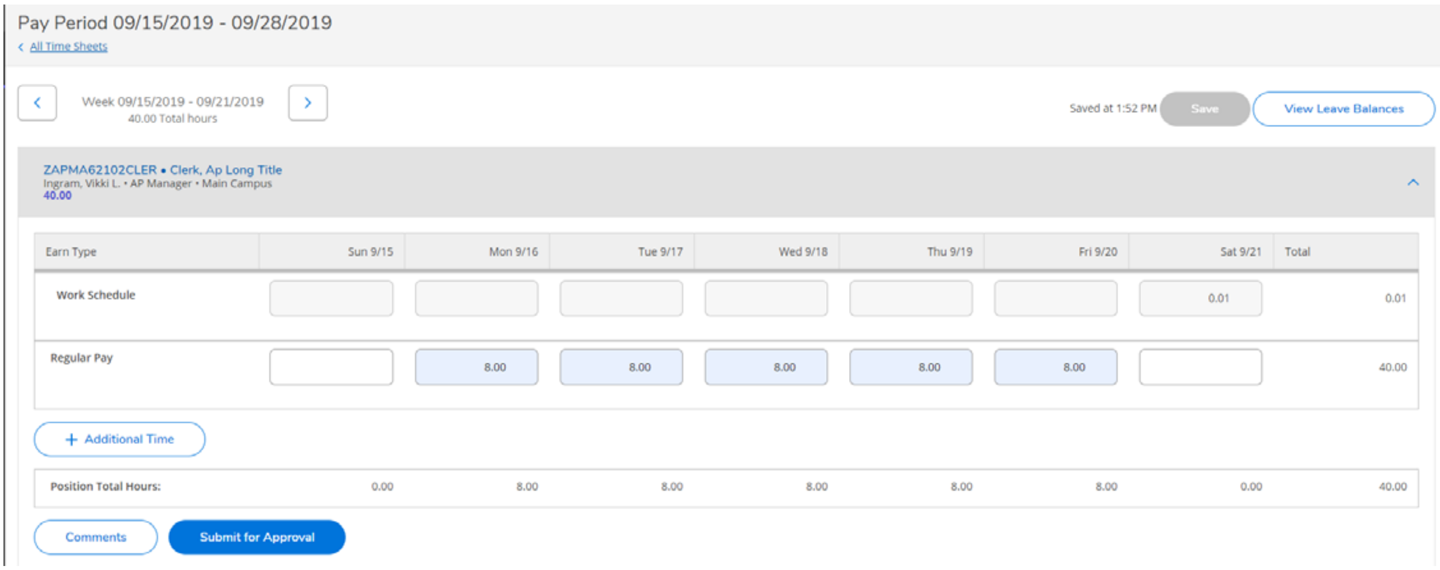


Multiple jobs will look like this; click the blue arrow to expand all timesheets.

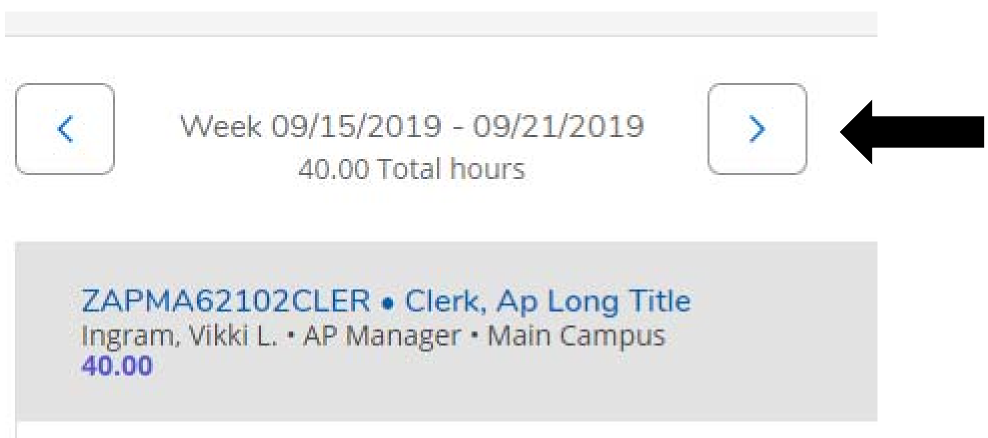


2. Only Enter Time Worked for each day of the timecard if you are entering an exception, for example vacation, sick, jury duty, etc. Your time will save automatically. There is a Save button, but you don't really need it.

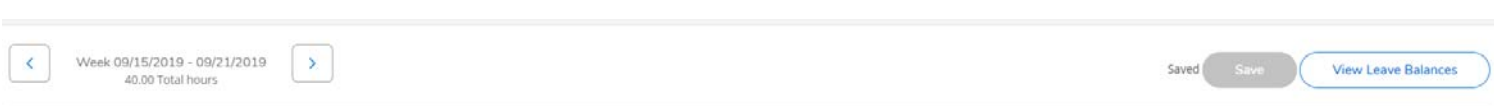
Summary time entry view



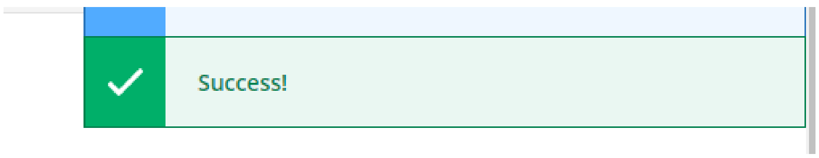
Notice that the arrows toggle back and forth between both weeks in the pay period to allow you to enter time on the correct week.



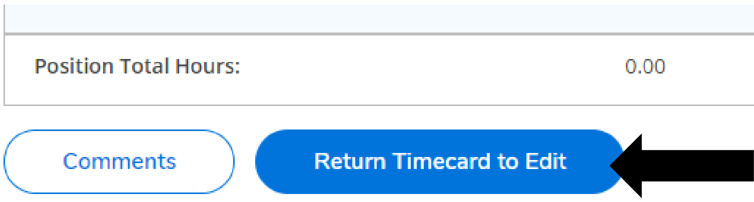
3. Submit time for approval based on HR policies. If you wish to make comments on your timesheet, you must do it before you "Submit for Approval".



4. After clicking "Submit for Approval" you will see this pop up in the upper right corner of your screen. Your Supervisor will get an e-mail that you have submitted your timecard.

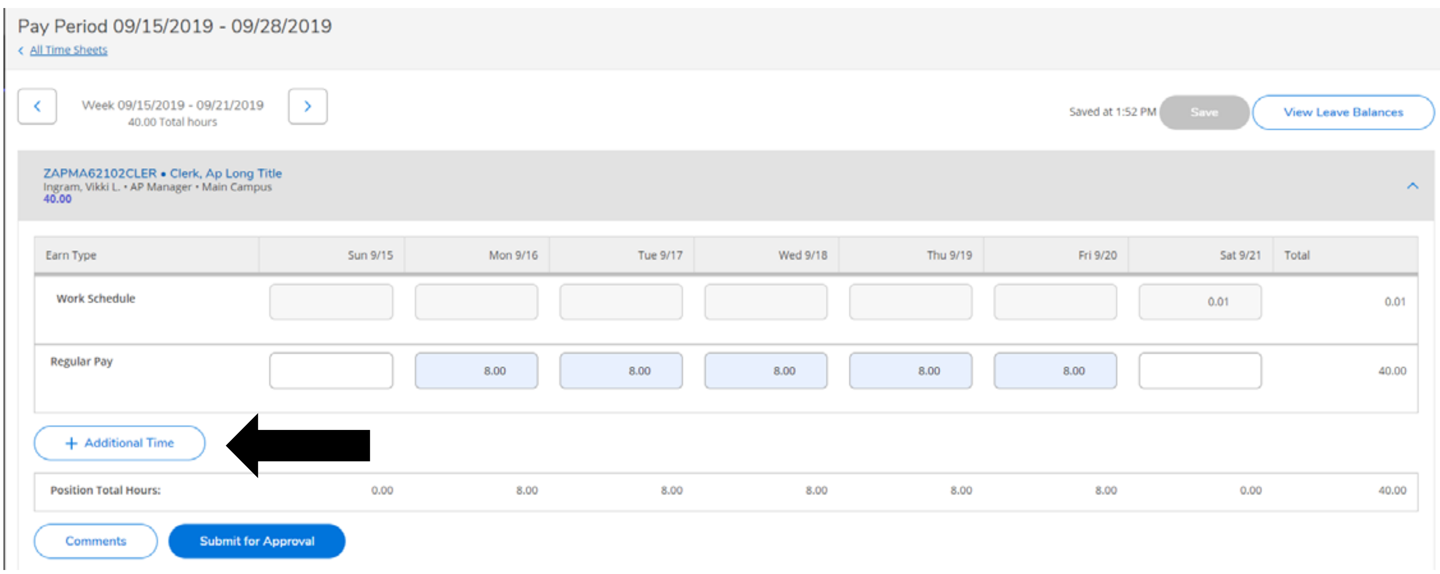


If you made a mistake on a timecard and you need to correct it, click "Return Timecard to Edit". Once you've made your changes, resubmit the time. Keep in mind that your Supervisor will get an email for each action that you make to the timecard.

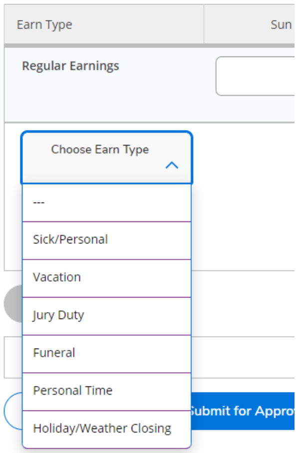


Entering in Vacation/Sick or other Leave Time

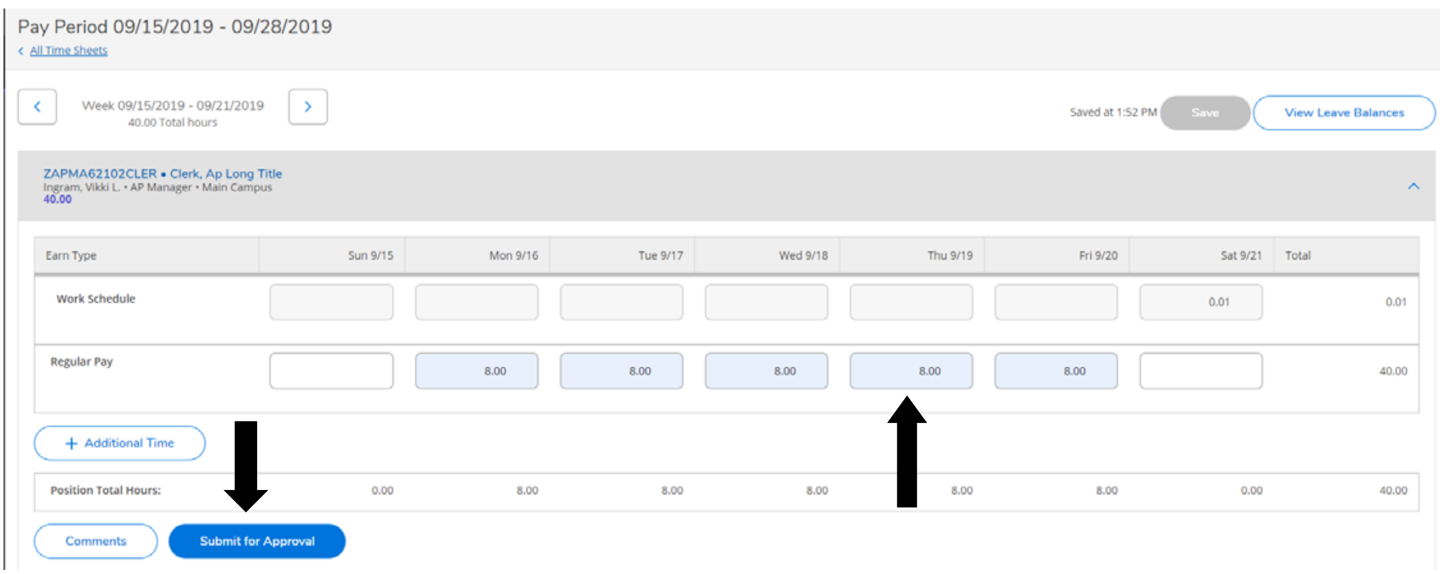
1. From your timecard, Select "+ Additional Time".



2. Select the earnings type you wish to enter

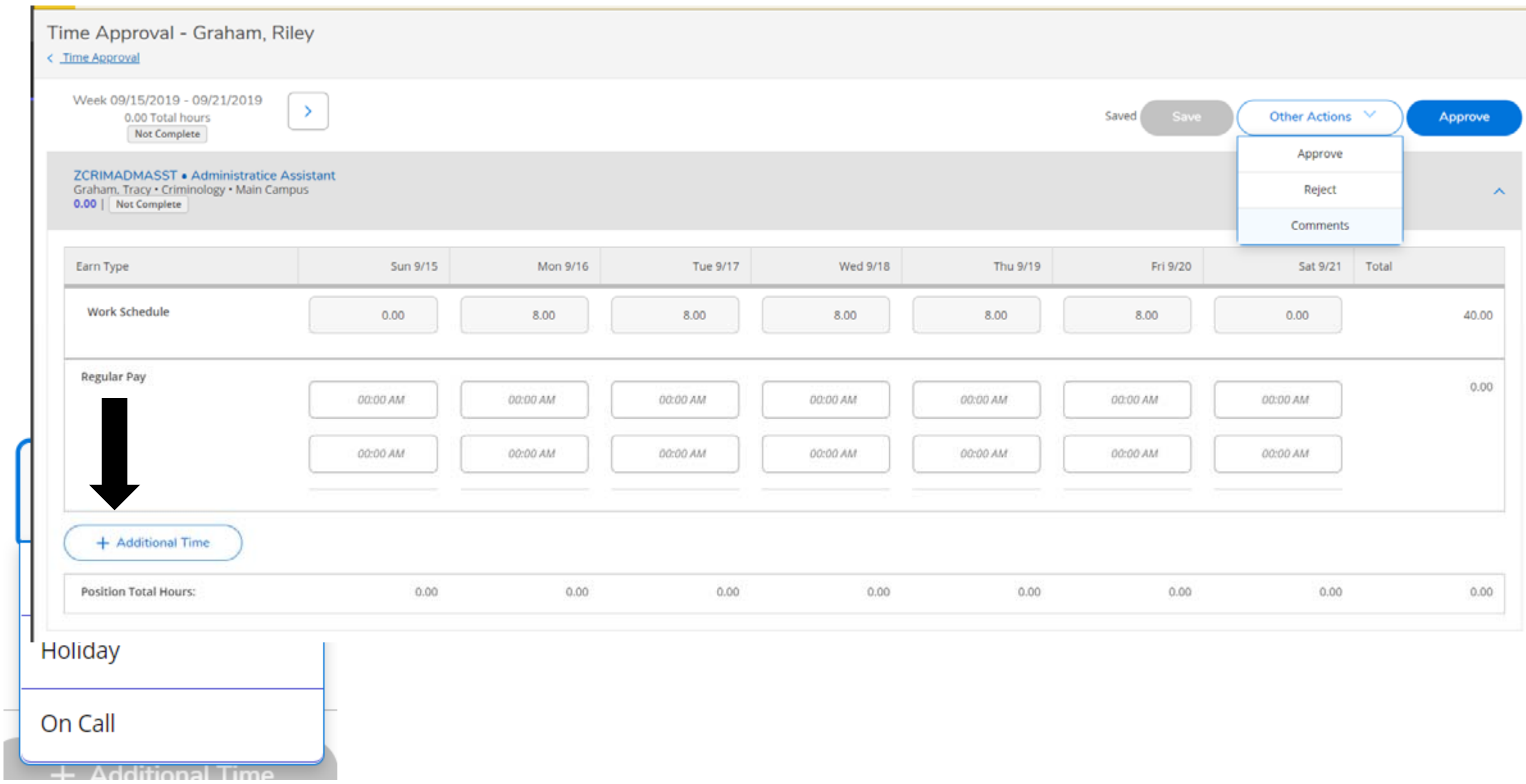


Enter the number of hours on the day of the week in which you took the leave. For this example, we will select funeral leave. Enter the number of hours. You can add other leave types by clicking "+ Additional Time" and repeating the process. Once you are done, you may exit the timecard (remember your time saves automatically) or you can click Save. If you have finished entering time for the pay week, click "Submit for Approval".



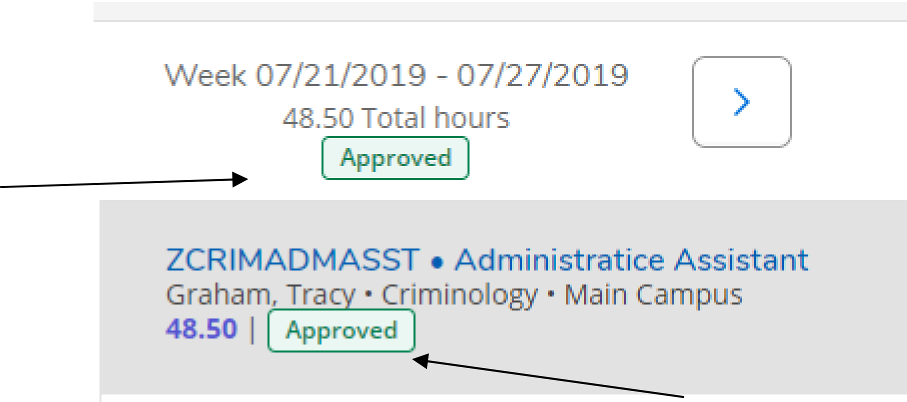
If your employee forgets to add leave to their timecard, you can add it for them or reject the timecard, sending it back for them to edit. Click "+ Additional Time" to edit time.

After you click on "+ Additional Time" choose the description that matches the time you need to enter for the employee. Key in the hours on the date the leave was used.



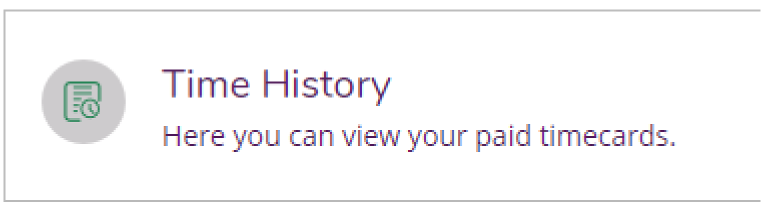
After you add the additional time, if you need to remove it you can click on "Remove".

Once you have approved the timecard, green “Approved” boxes will appear and you are done with the employee.

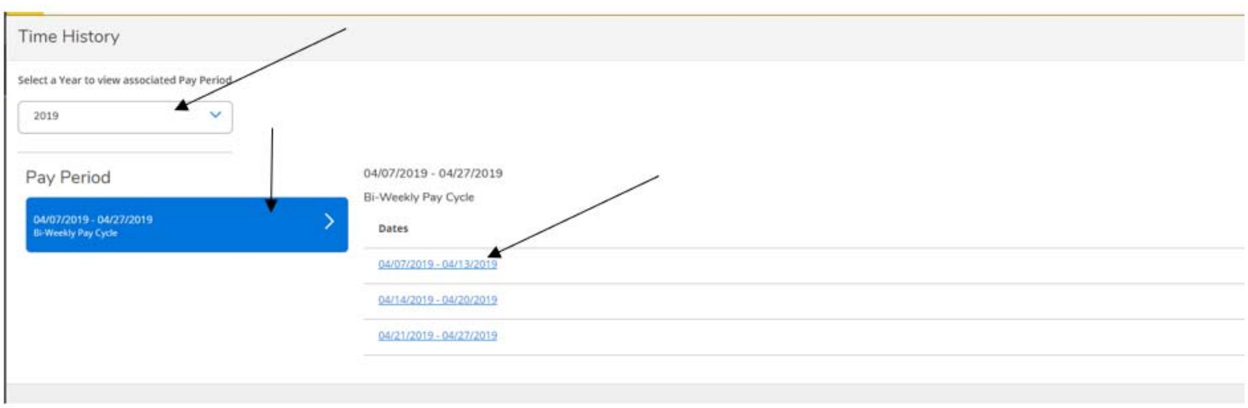


Time History for Employee

Select Time History

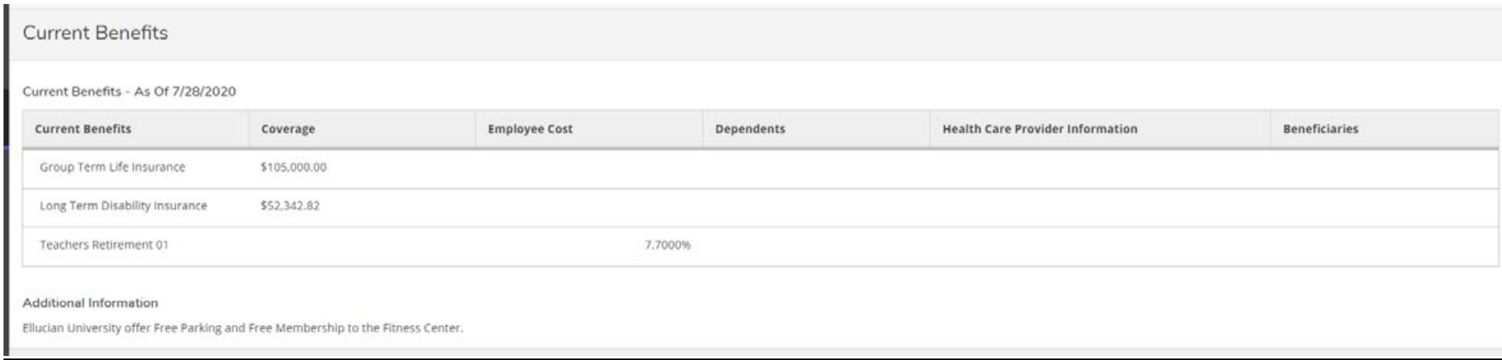


In this section you can view time sheet history. To change to a previous year, click the blue drop down arrow next to the current year at the top of the screen. Click the blue “>” to navigate between pay periods. Expand the timecard by clicking the date range on the right side of the screen.



Current Benefits

This is where employees can view their current benefit elections.



Current Benefits

Current Benefits - As Of 7/28/2020

Current Benefits	Coverage	Employee Cost	Dependents	Health Care Provider Information	Beneficiaries
Group Term Life Insurance	$105,000.00				
Long Term Disability Insurance	$52,342.82				
Teachers Retirement 01		7.7000%			

Additional Information

Ellucian University offer Free Parking and Free Membership to the Fitness Center.

Logging Off

You should always log off ESS by exiting using the "SIGN-OUT" link as shown below.