

Employee Self Service Guidebook

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View and Edit Personal Details









NOTE: If an employee has a name/gender/marital status/ or education level change that info can be updated here

1. Select “Me” on the homepage bar, then select “Personal Information” tile













Good morning, Jane Doe

Me Tools Others

QUICK ACTIONS

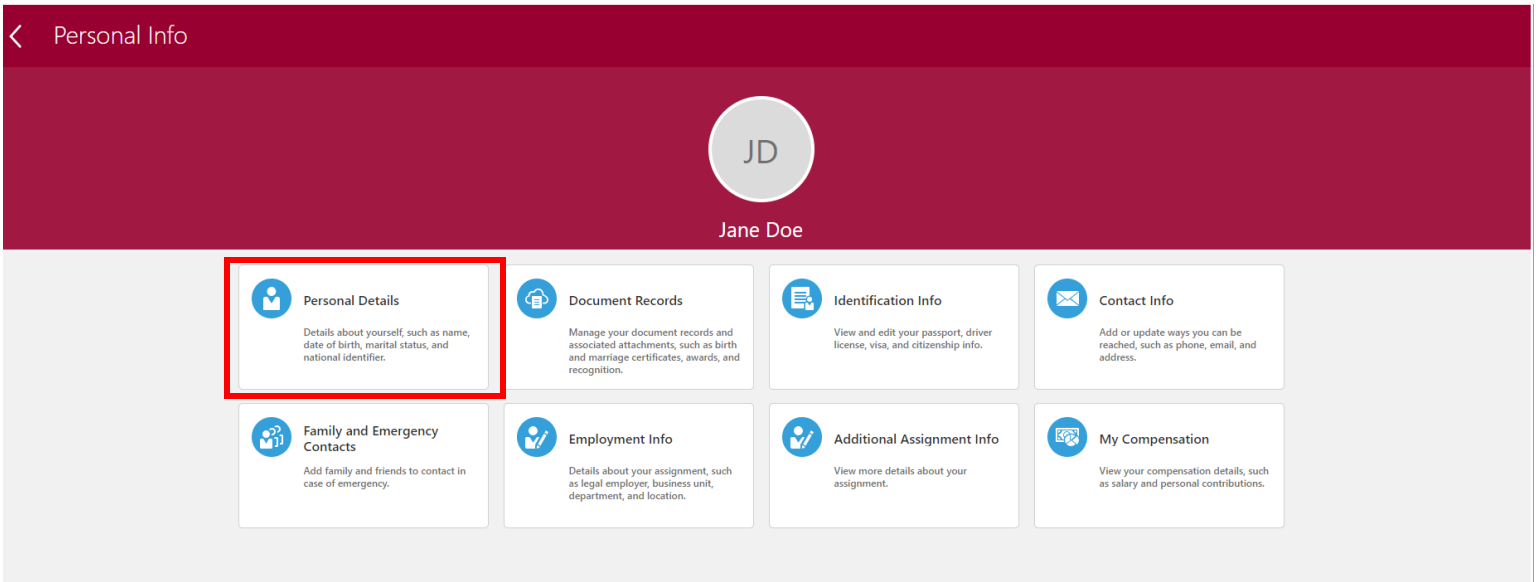
-  Personal Details
-  Document Records
-  Identification Info
-  Contact Info
-  Family and Emergency Contacts
-  My Organization Chart
-  My Public Info
-  Change Photo

APPS

- | | | | | |
|--|--|---|--|---|
| 
Directory | 
Journeys | 
Pay | 
Time and Absences | 
Career and Performance |
| 
Personal Information | 
Benefits | 
Opportunity Marketplace | 
Personal Brand | 
Volunteering |
| 
Expenses | 
Hiring | + | | |

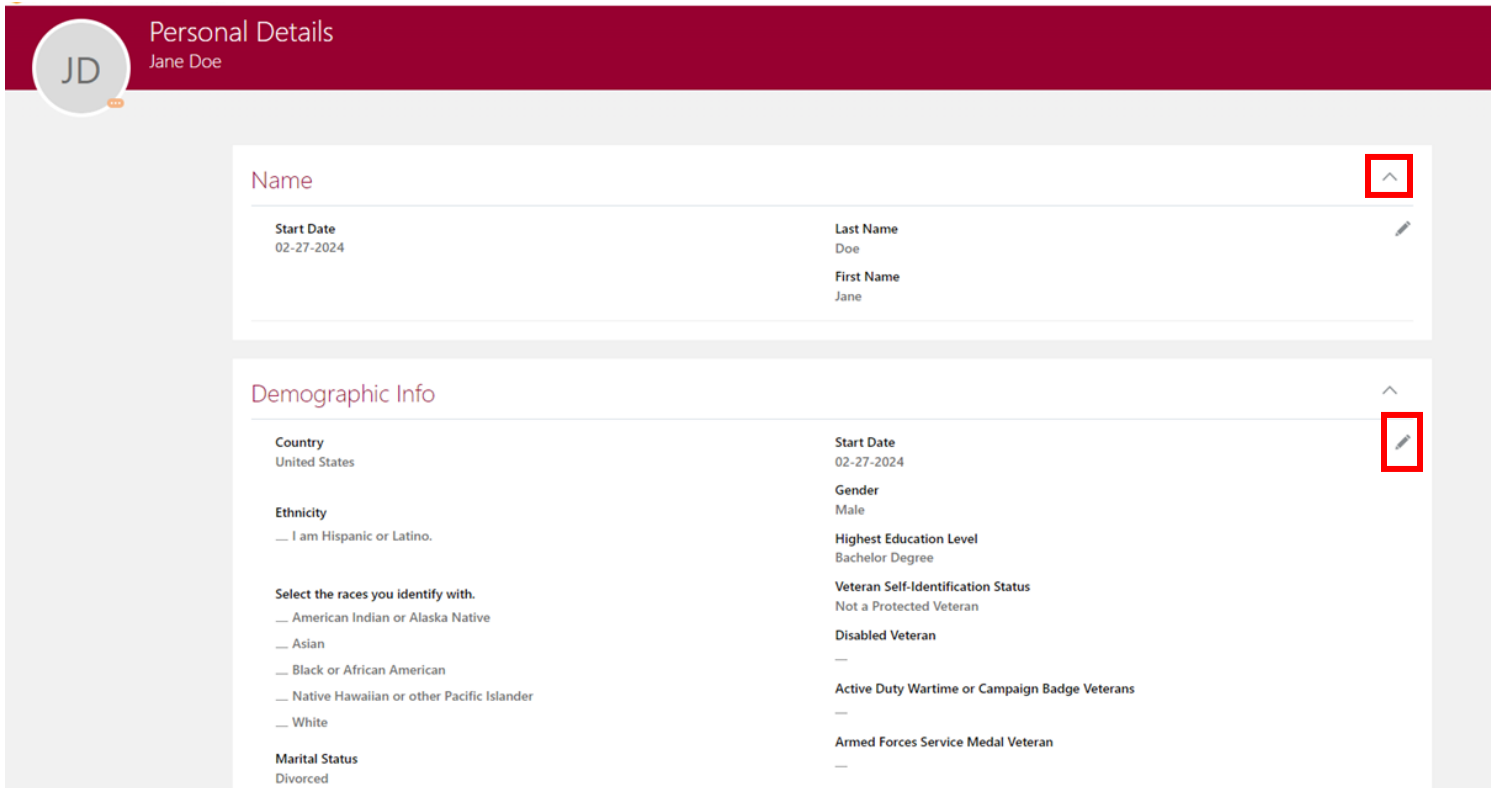
Show More

2. Select Personal Details" tile



3. You will be able to view Name, Demographic Info, National Identifiers (SSN), Date of Birth, and Disability info

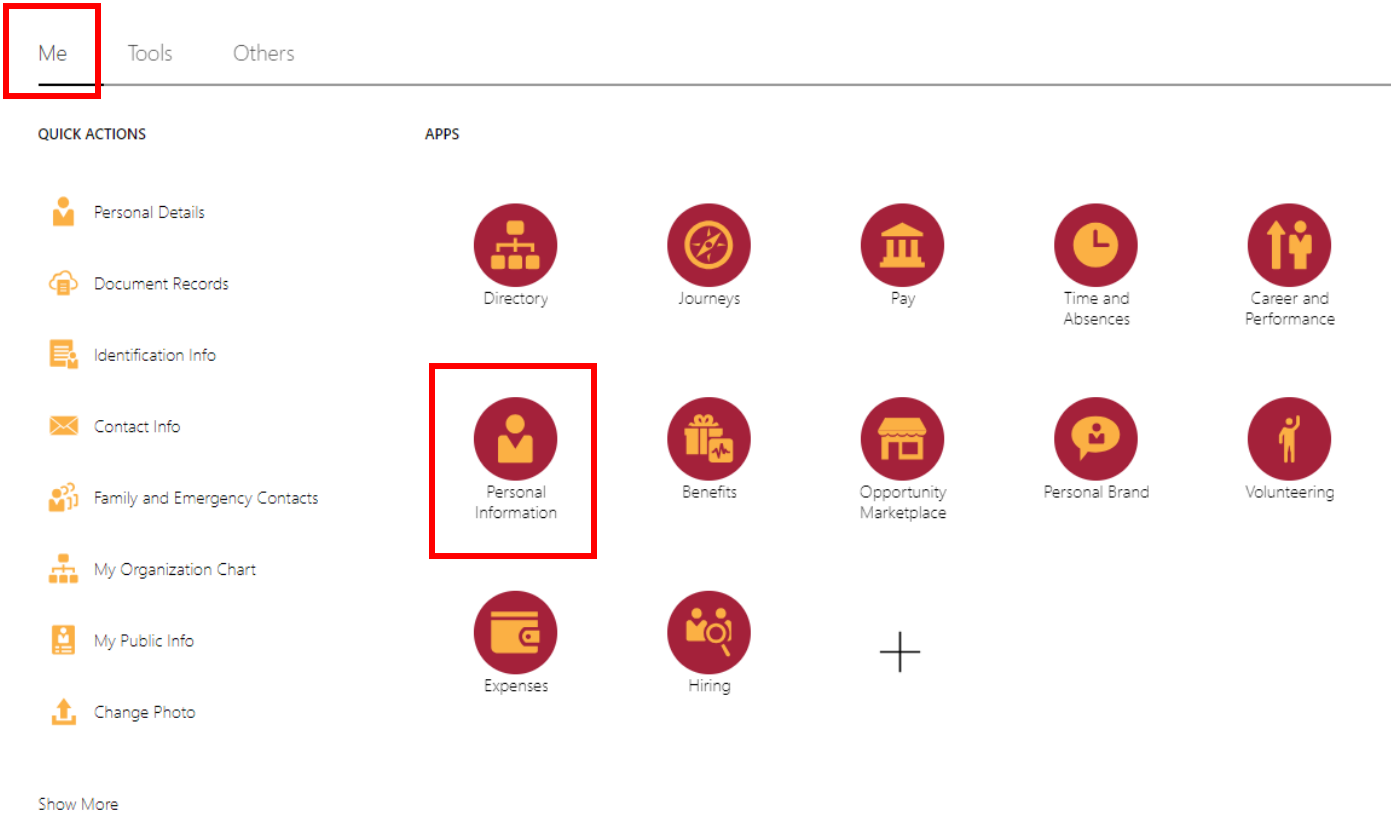
NOTE: You will be able to edit/update all sections except National Identifiers (SSN) and Date of Birth. Select pencil icon on far right to edit a section. Select the arrow (^) on far-right side to open and collapse sections.



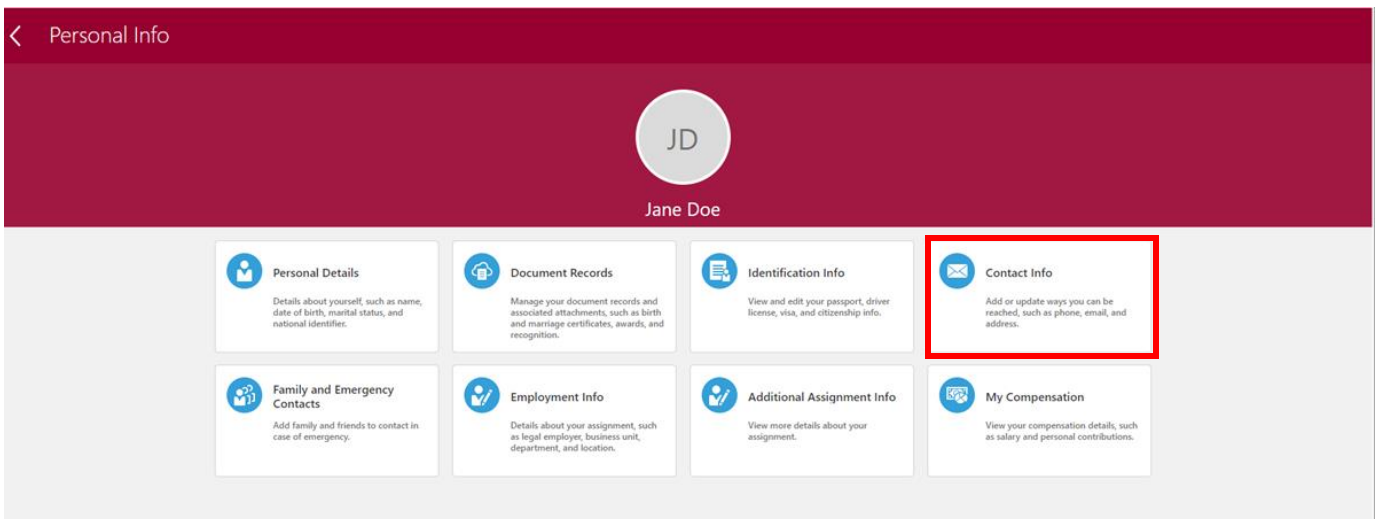
View and Update Contact Info

1. Select “Me” on the homepage bar, then select “Personal Information” tile

Good morning, Jane Doe



2. Select “Contact Info” tile



3. View or update your home/mobile phone number, email address, and home address

NOTE: To add a new communication method or address without deleting information select "Add". To edit or delete information that is already in the system select the pencil icon. The date you enter as the start date should be the date this change is effective from.

The screenshot shows a user profile page for Jane Doe. At the top left, there is a circular profile picture with the initials 'JD' and the name 'Jane Doe' next to it. The page is titled 'Contact Info'. Below the title, there are two main sections: 'Communication' and 'Address'. Each section has a '+ Add' button and an upward arrow icon. The 'Communication' section lists two items: 'Home Mobile Phone' with the number '1-987-987-9877' and 'Home Email' with the address 'personalemail@gmail.com'. The 'Address' section lists 'Home Address' with the details '502 Maincampus Dr, Collegeville, PA 19426, Montgomery, United States' and a 'Start Date' of '02-27-2024'. Each item in both sections has a pencil icon for editing.

Contact Info
Jane Doe

Communication + Add ^

- Home Mobile Phone
1-987-987-9877
- Home Email
personalemail@gmail.com

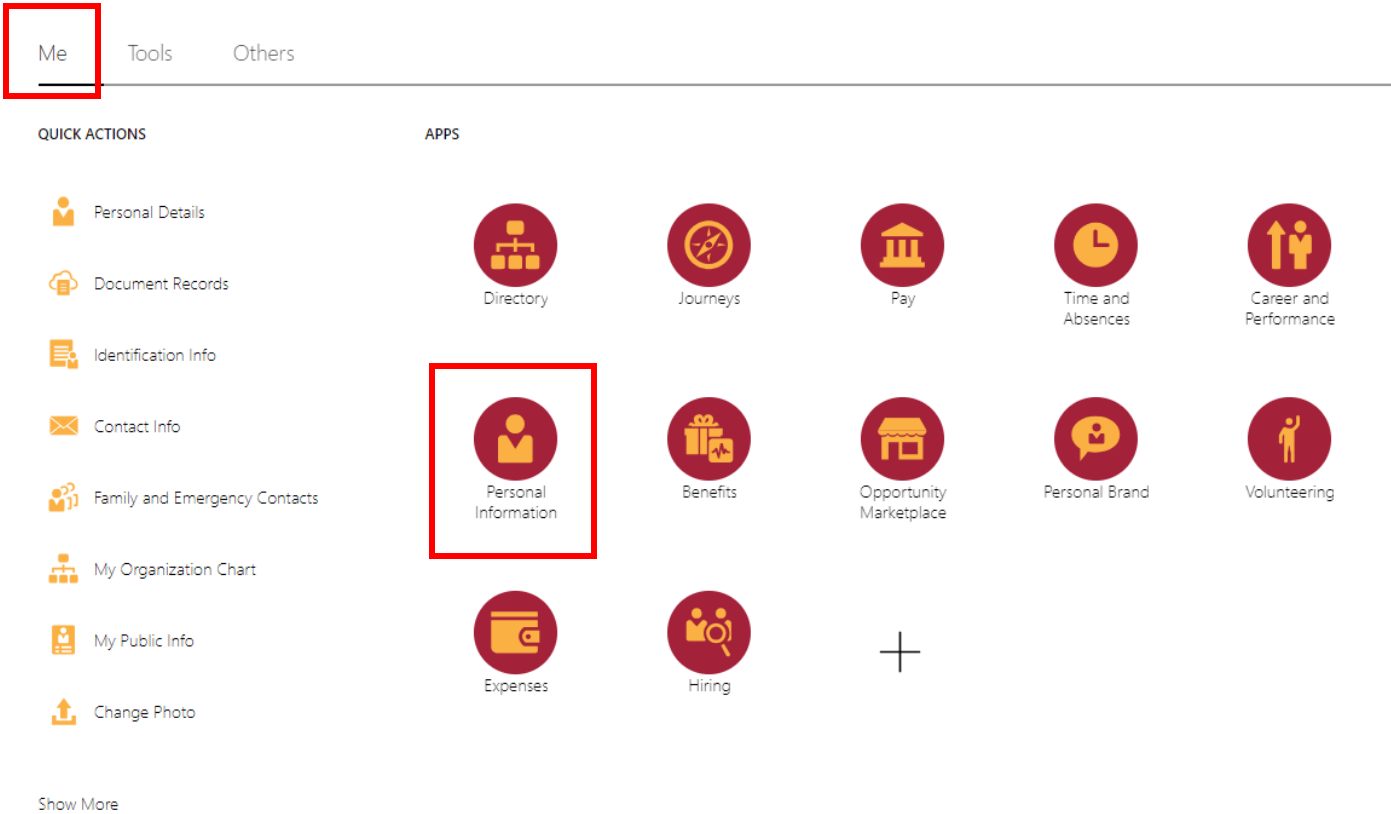
Address + Add ^

- Home Address
502 Maincampus Dr
Collegeville, PA 19426
Montgomery
United States
- Start Date
02-27-2024

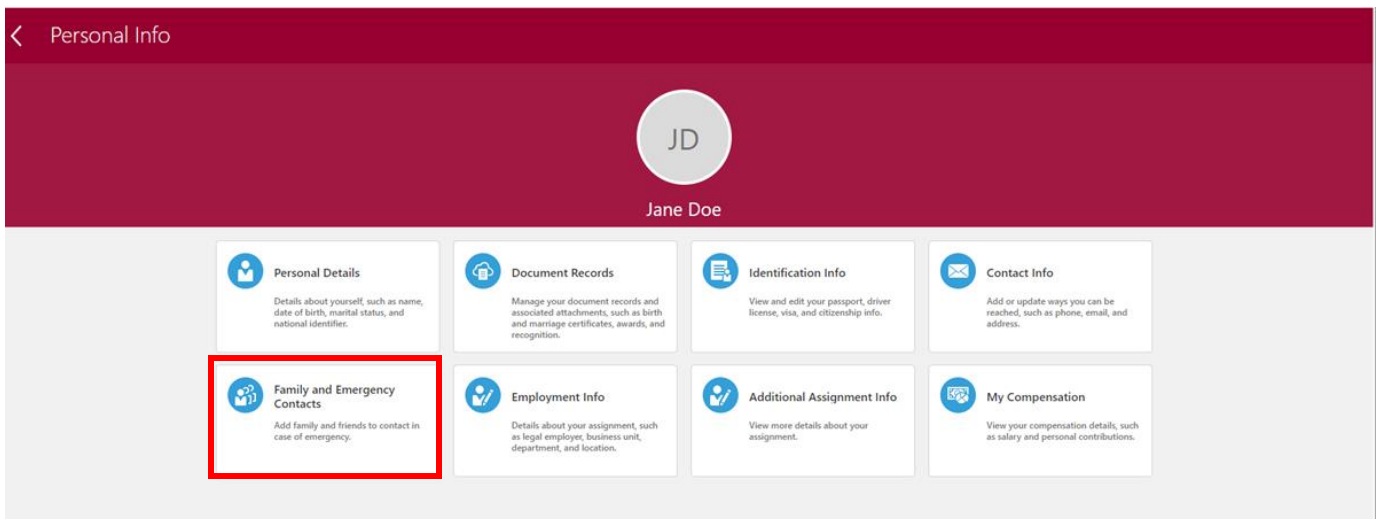
Add Family and Emergency Contacts

1. Select “Me” on the homepage bar, then select “Personal Information” tile

Good morning, Jane Doe



2. Select “Family and Emergency Contacts” tile



3. Select the “Add” button in the upper right-hand corner and then select “Create a New Contact”

Family and Emergency Contacts
Jane Doe

My Contacts

+ Add

There's nothing here so far.

Create a New Contact

4. Enter required basic info for contact then scroll down to enter communication info and address for your contact. Once done, select “Submit” in upper right-hand corner

NOTE: TIN (SSN) and DOB will only need entered for contacts that will be listed as your dependents. Please check box to indicate if that person is your emergency contact

New Contact

Submit

Cancel

Basic Information

Title
Select a value

Suffix

*Last Name

Preferred/Current Name

*First Name

Professional Last Name

Middle Name

*Relationship
Select a value

*Effective Date
mm-dd-yyyy

Gender
Select a value

*Date of Birth (Required for Dependents)
mm-dd-yyyy

This person is an emergency contact

*TIN Type and TIN Number are required for Dependents

TIN Type

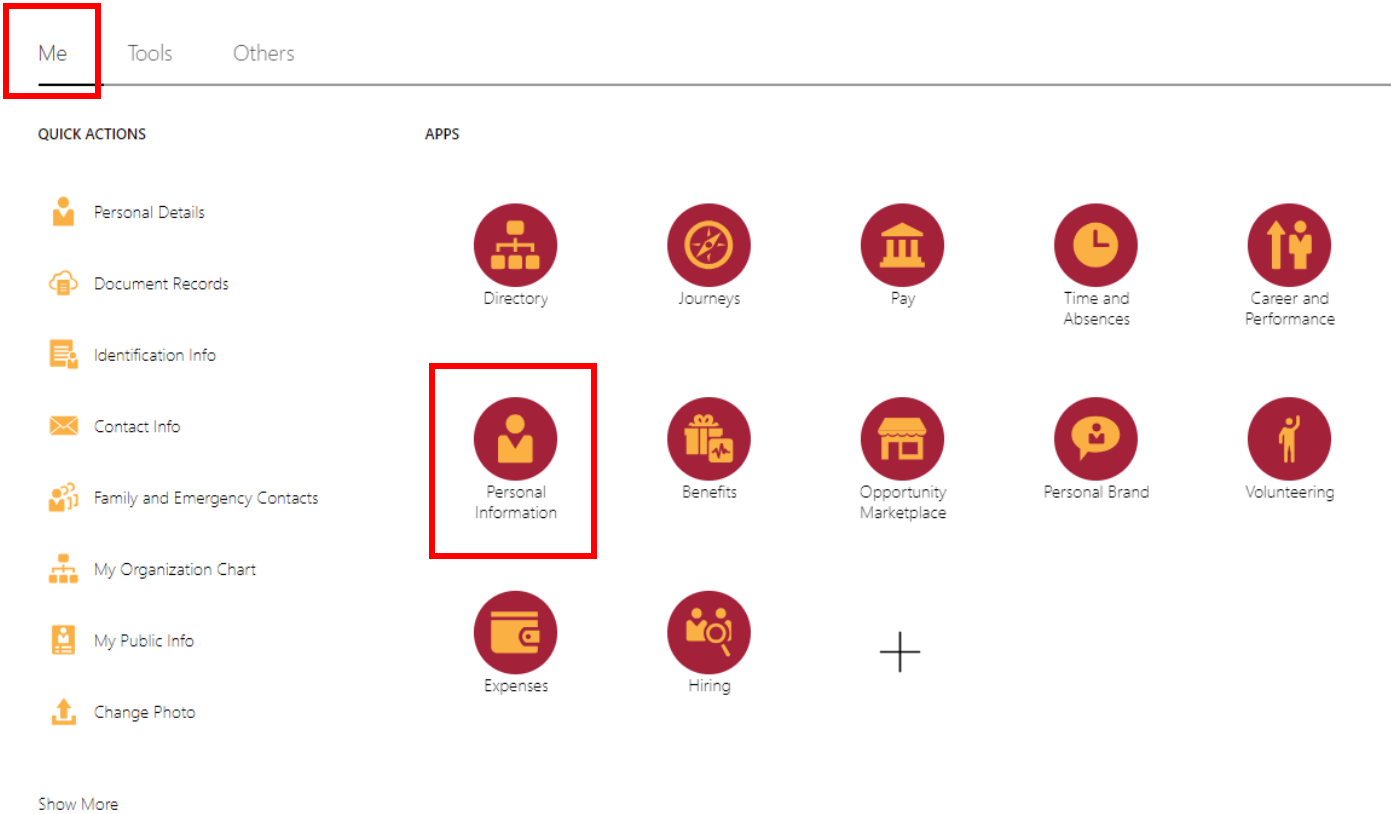
TIN Number

Benefits Offered Conditionally

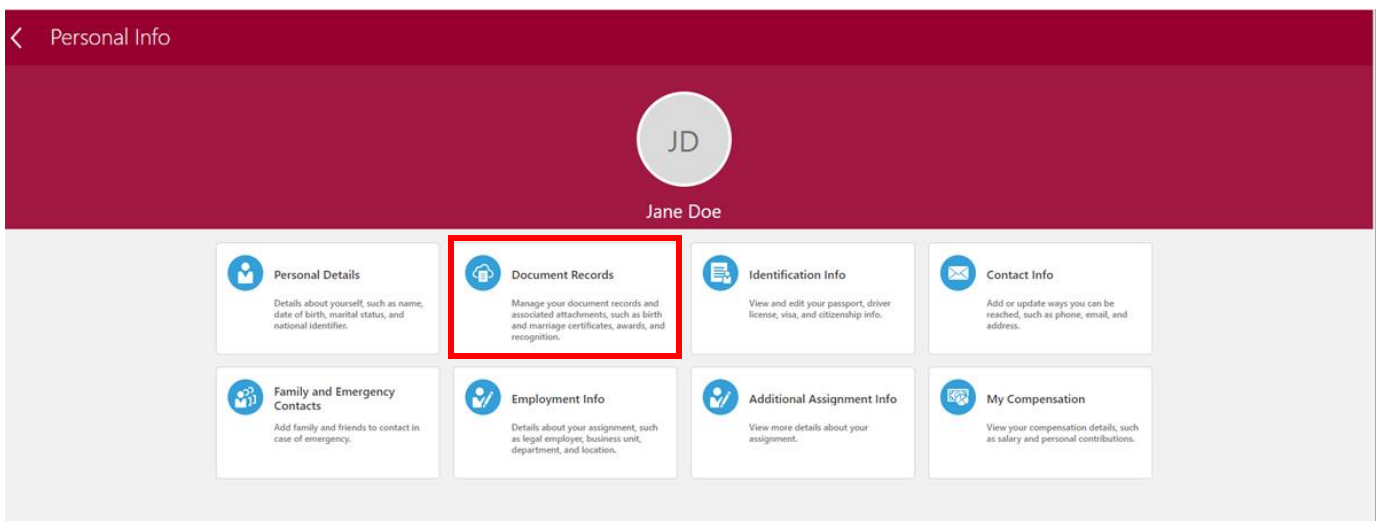
View and Upload Documents

1. Select “Me” on the homepage bar, then select “Personal Information” tile

Good morning, Jane Doe



2. Select “Document Records” tile



- Any existing documents will show here. You can also add a document by selecting the “Add” button in the upper right-hand corner

NOTE: To find documents easier select “show filters” and filter as needed

Document Records

JD Jane Doe

Document Records

Search by type, name, or number

Show Filters

Excluded Payroll Expired

+ Add

Sort By Last Updated - Descending

Nothing matches your search. Try again.

- Select “Document Type” from the drop-down menu then drop file or click to add. Once file is added select “submit” in upper right-hand corner

NOTE: You may upload multiple attachments. Context value box will not have drop down values, please disregard.

Add Document

JD Jane Doe

Submit Cancel

Document Details

*Document Type

Proof of other coverage

Category

Benefits

Country

All Countries

Description

Documents associated with benefits certification - Other coverage

Context Value

Context Value

Attachments

Drag files here or click to add attachment

- To view more details regarding a specific document, select the eyeglasses icon on the far-right side

The screenshot shows a user interface for 'Document Records' under the name 'Jane Doe'. The interface features a search bar with the placeholder text 'Search by type, name, or number', a 'Show Filters' button, and three active filter tags: 'Excluded', 'Payroll', and 'Expired'. A 'Sort By' dropdown menu is set to 'Last Updated - Descending'. Below these controls is a table with the following data:

Document Type	Last Updated Date	
Proof of other coverage	05-08-2024	
Category		
Benefits		

View and Update Identification Info

1. Select “Me” on the homepage bar, then select “Personal Information” tile

Good morning, Jane Doe

The screenshot shows a user interface with a top navigation bar containing 'Me', 'Tools', and 'Others'. The 'Me' tab is highlighted with a red box. Below the navigation bar, there are two main sections: 'QUICK ACTIONS' and 'APPS'. The 'QUICK ACTIONS' section lists: Personal Details, Document Records, Identification Info, Contact Info, Family and Emergency Contacts, My Organization Chart, My Public Info, and Change Photo. The 'APPS' section displays a grid of circular icons for: Directory, Journeys, Pay, Time and Absences, Career and Performance, Personal Information (highlighted with a red box), Benefits, Opportunity Marketplace, Personal Brand, Volunteering, Expenses, and Hiring. A plus sign is also visible in the 'APPS' section. At the bottom left, there is a 'Show More' link.

2. Select “Identification Info” tile


The screenshot shows the 'Personal Info' page for Jane Doe. The page has a dark red header with a back arrow and the text 'Personal Info'. Below the header is a circular profile picture with the initials 'JD' and the name 'Jane Doe'. The main content area contains eight tiles arranged in two rows. The 'Identification Info' tile in the top row is highlighted with a red box. The tiles are: Personal Details (Details about yourself, such as name, date of birth, marital status, and national identifier), Document Records (Manage your document records and associated attachments, such as birth and marriage certificates, awards, and recognition), Identification Info (View and edit your passport, driver license, visa, and citizenship info.), Contact Info (Add or update ways you can be reached, such as phone, email, and address), Family and Emergency Contacts (Add family and friends to contact in case of emergency), Employment Info (Details about your assignment, such as legal employer, business unit, department, and location), Additional Assignment Info (View more details about your assignment), and My Compensation (View your compensation details, such as salary and personal contributions).

3. Selection “Add” in the appropriate section to update Citizenship, Passport, Visa/Permit, and Driver’s License info


NOTE: You can upload attachments and documents within each of these sections. If you do update info in one of these sections, be sure to select “submit” to save your info.

JD Identification Info
Jane Doe


Citizenship + Add ^

 There's nothing here so far.


Passports + Add ^

 There's nothing here so far.

Visas and Permits + Add ^

 There's nothing here so far.

Driver's Licenses + Add ^

 There's nothing here so far.

Driver's Licenses Submit Cancel

*Issuing Country
United States

License Type
Select a value

License Number


Issuing Authority

From Date
mm-dd-yyyy

Place of Issue

Comments

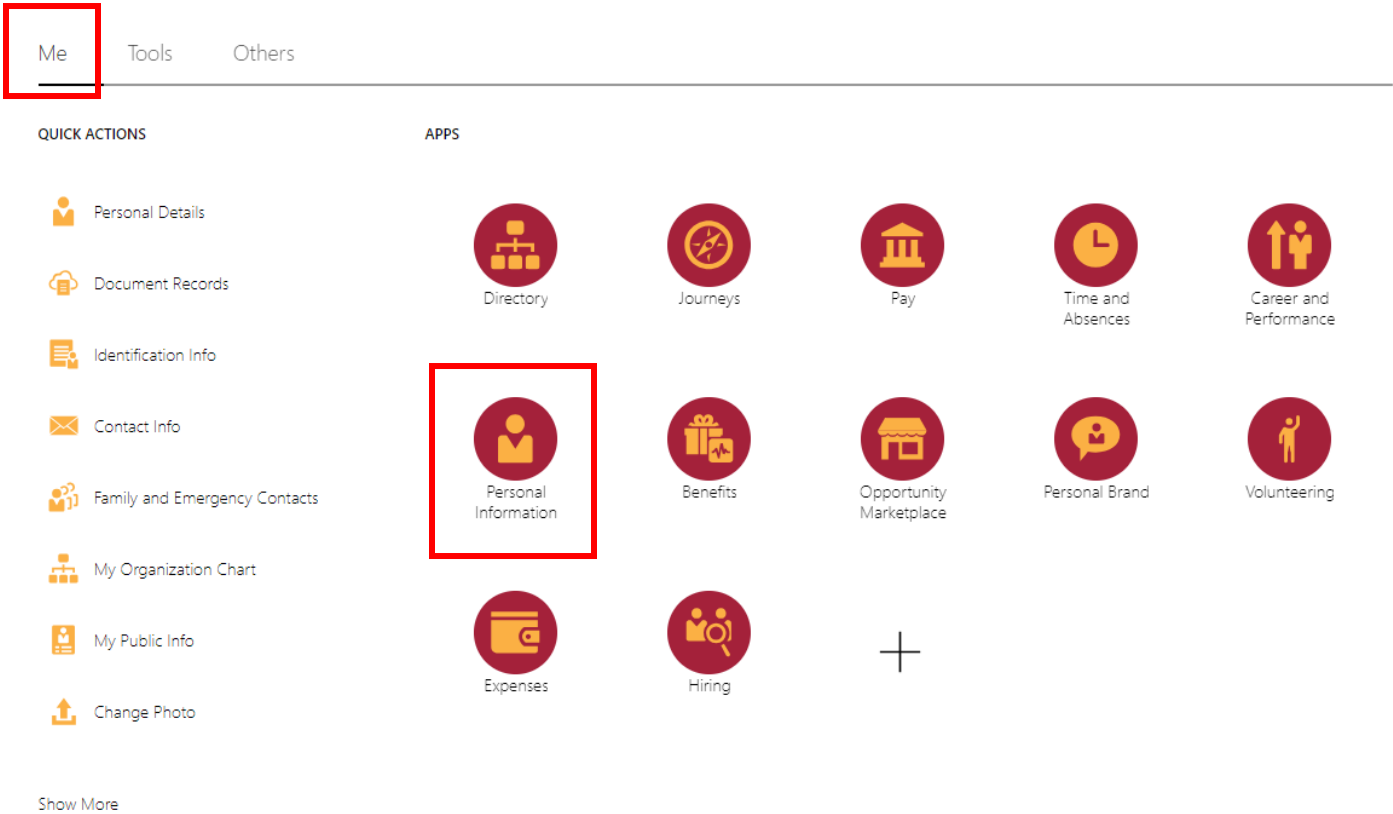
Attachments

 Drag files here or click to add attachment

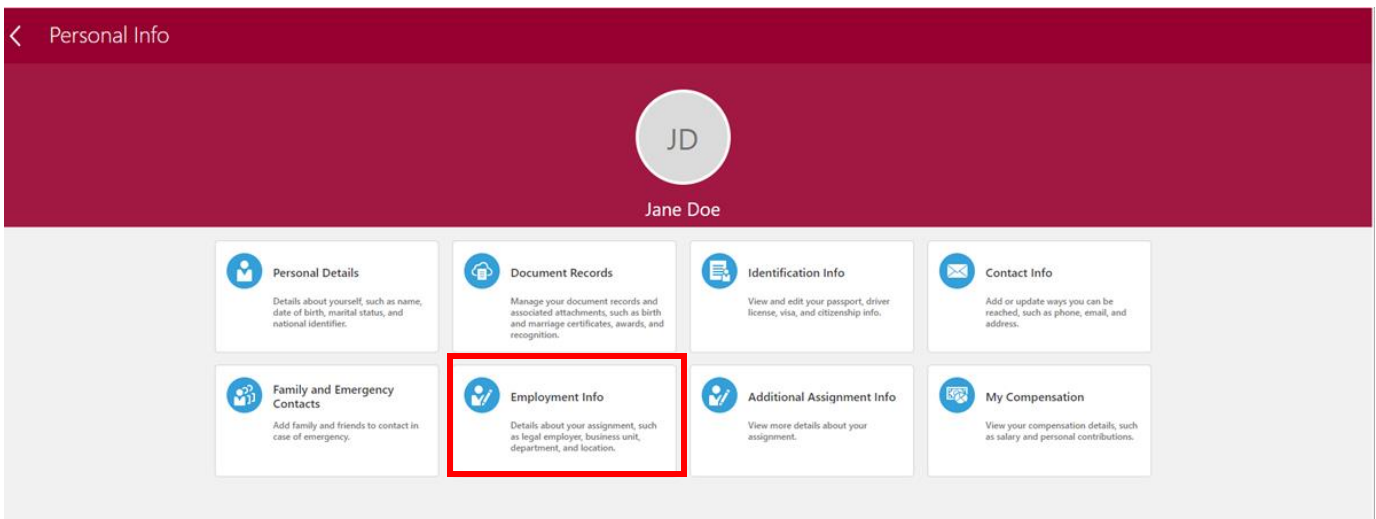
View Employment Info

1. Select “Me” on the homepage bar, then select “Personal Information” tile

Good morning, Jane Doe



2. Select “Employment Info” tile



3. View your employment info, managers, seniority dates, and employment history here

NOTE: Select arrow (^) to expand/collapse section info. If you'd like to submit your resignation you can also do so on this page by selection "Actions" and then selecting "Resignation".

JD Employment Info
Jane Doe

Actions ▾
Additional Assignment Info
Resignation
Seniority Dates

Assignment

Legal Employer Ursinus College	Full Time or Part Time Full time
Business Unit UC BU	Regular or Temporary Regular
Job Code FA000491	Working at Home No
Job HR Generalist	Primary Assignment Yes
Business Title Carpenter	Working Hours 40 Weekly
Department Human Resources	FTE 1
Location MAIN CAMPUS	Person Number 654987654
Position Code 20494	Working as a Manager No
Position HR Generalist	Synchronize from Position Yes
Hourly Paid or Salaried	People Group ..
Assignment Category Staff Full Time Regular	

Managers

JN Joelle Neatrou Assistant Director of Human Resources	Line manager
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Seniority Dates

Ursinus College Enterprise	Seniority Date 02-27-2024	Length of Service 0 Years 2 Months 7 Days
Ursinus College Legal Employer	Seniority Date 02-27-2024	Length of Service 0 Years 2 Months 7 Days

Employment History

Hire Last Updated By 1001009	Start Date 02-27-2024 Carpenter Last Updated Date 05-08-2024
--	--

4. After selecting “resignation” complete the “When and Why” section then “continue”

The screenshot shows the 'Submit Resignation' form for Jane Doe. The header includes a profile icon with 'JD' and the text 'Submit Resignation Jane Doe'. On the right, there are 'Submit' and 'Cancel' buttons. The main content area is titled '1 When and Why' and contains the following fields:

- 'When is the resignation notification date?' with the value '05-08-2024'.
- '*When is the resignation date?' with a date picker showing '05-08-2024'.
- '*What's the way to submit the resignation?' with a dropdown menu set to 'Resignation'.
- 'Why are you resigning?' with a dropdown menu set to 'Personal Reasons'.

A 'Continue' button is located at the bottom center of the form.

5. Then please upload a copy of your resignation letter/email in the “comments and attachments” section. Once completed, select the “submit” button

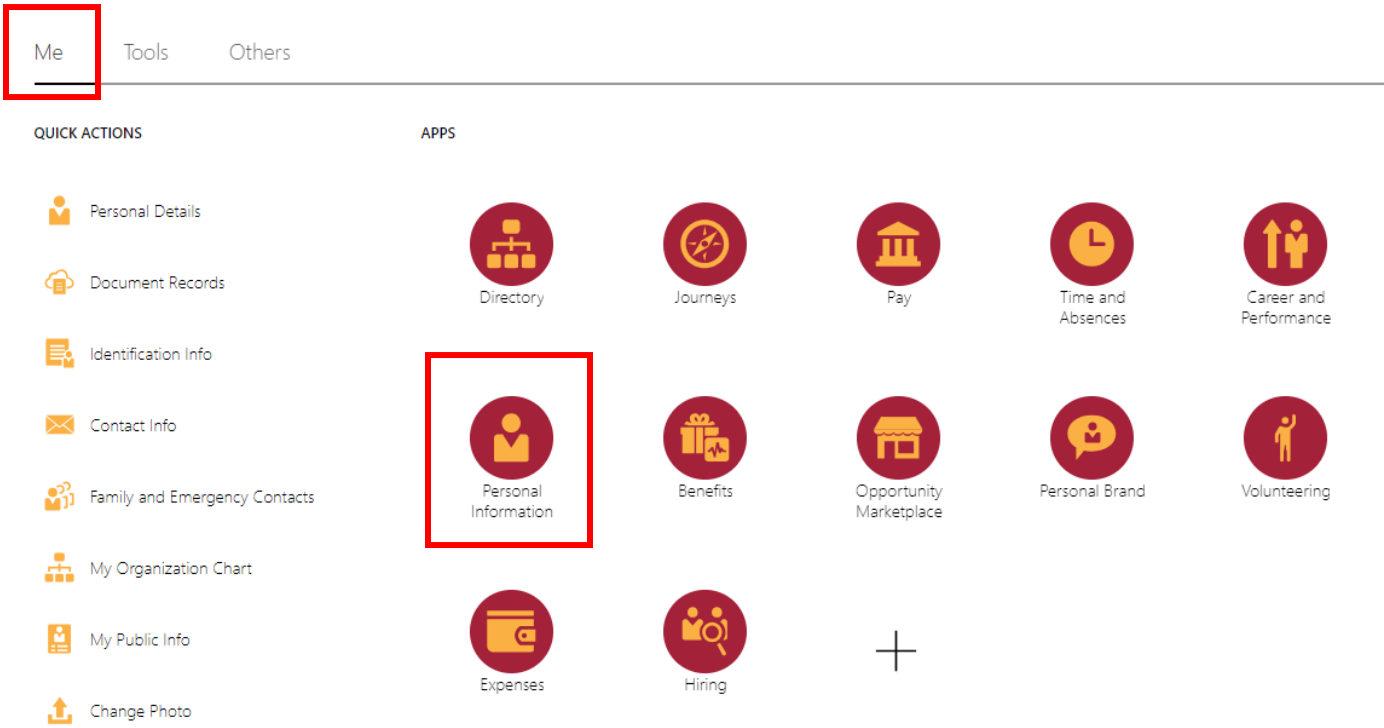
The screenshot shows the 'Submit Resignation' form for Jane Doe, now at step 3: 'Comments and Attachments'. The header is the same as in the previous screenshot, but the 'Submit' button is highlighted with a red box. The main content area shows a progress indicator with three steps: '1 When and Why', '2 Enter Resignation Info', and '3 Comments and Attachments'. Each step has an 'Edit' button. The 'Comments and Attachments' section includes:

- A 'Comments' text area with a 'Comments' label on the right.
- An 'Attachments' section with a dashed border, a green upload icon, and the text 'Drag files here or click to add attachment'.

View Compensation

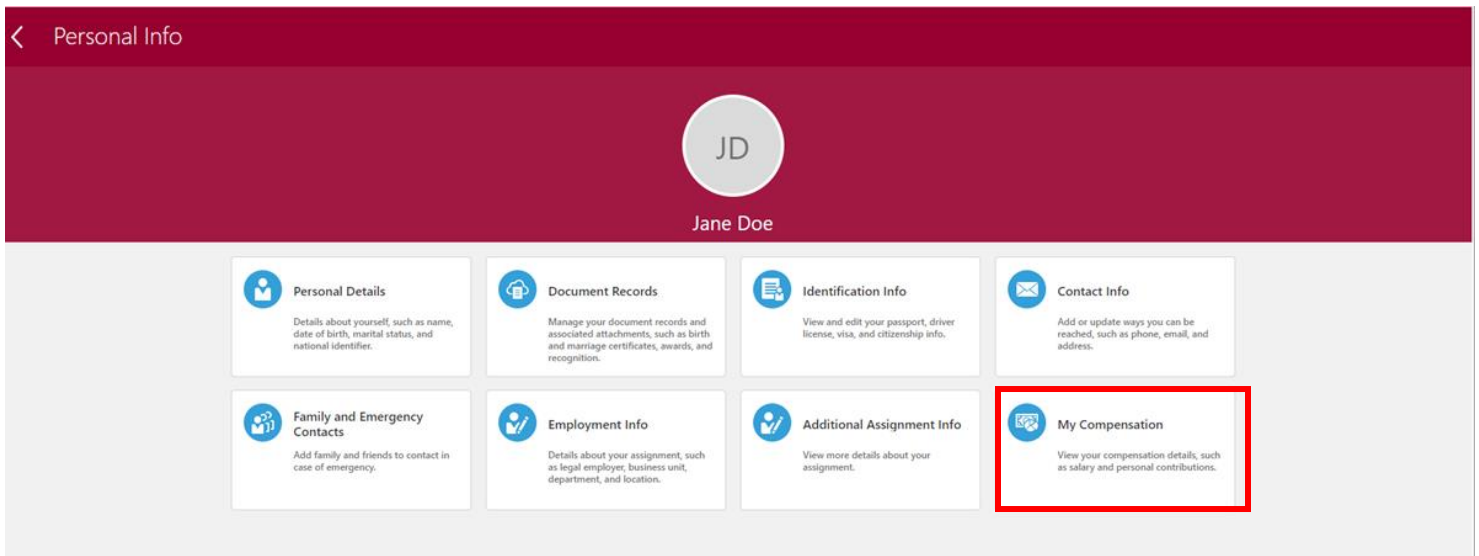
1. Select "Me" on the homepage bar, then select "Personal Information" tile

Good morning, Jane Doe



Show More

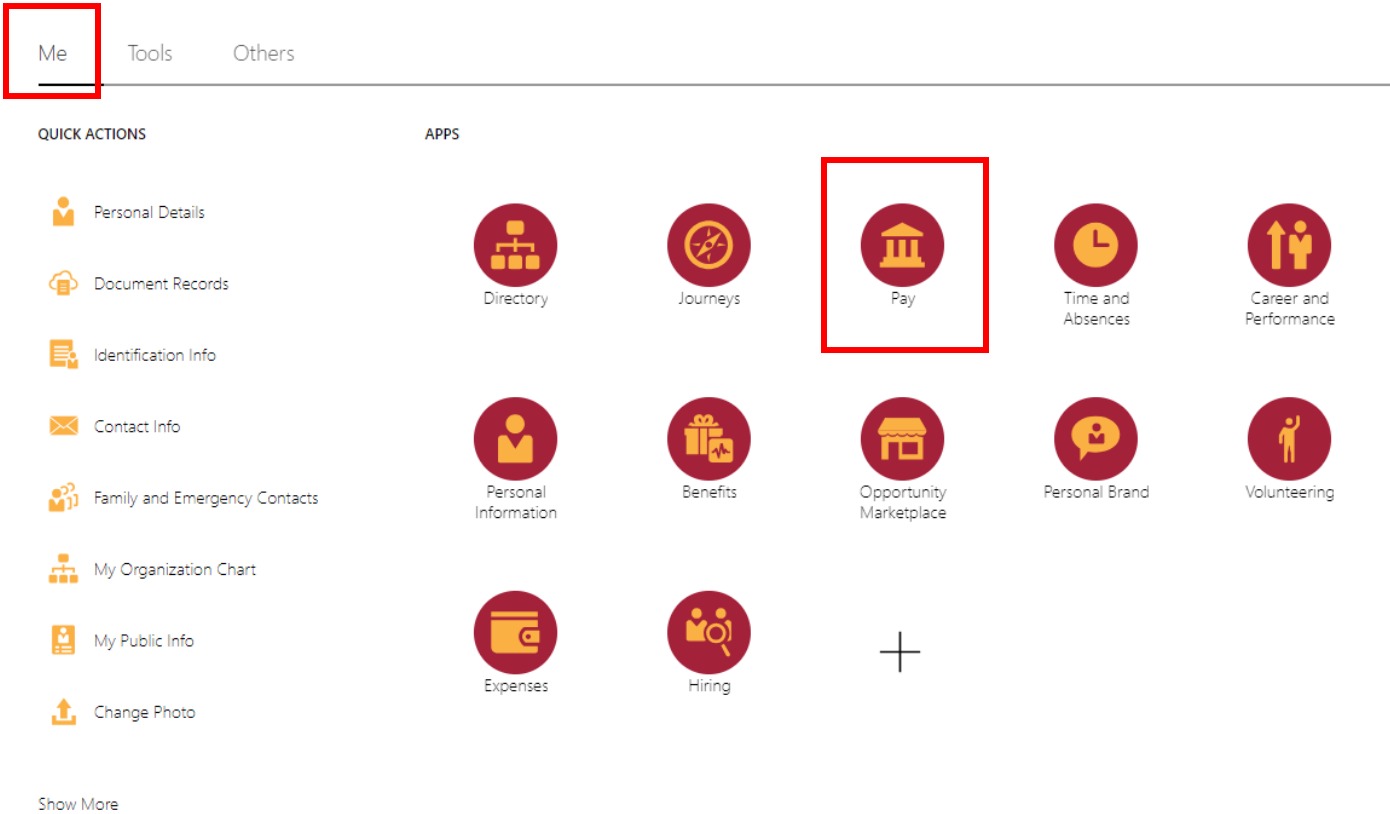
2. Select "My Compensation" tile to view your compensation information



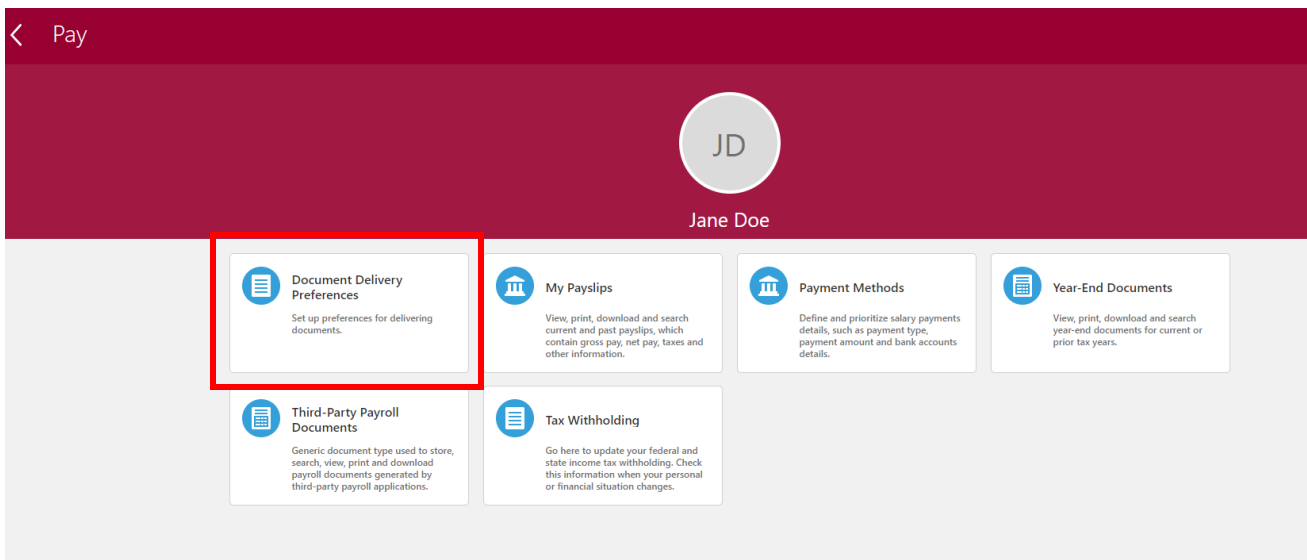
Document Delivery Preferences (W2/Payslip)

1. Select “Me” on the homepage bar, then select “Pay” tile

Good morning, Jane Doe

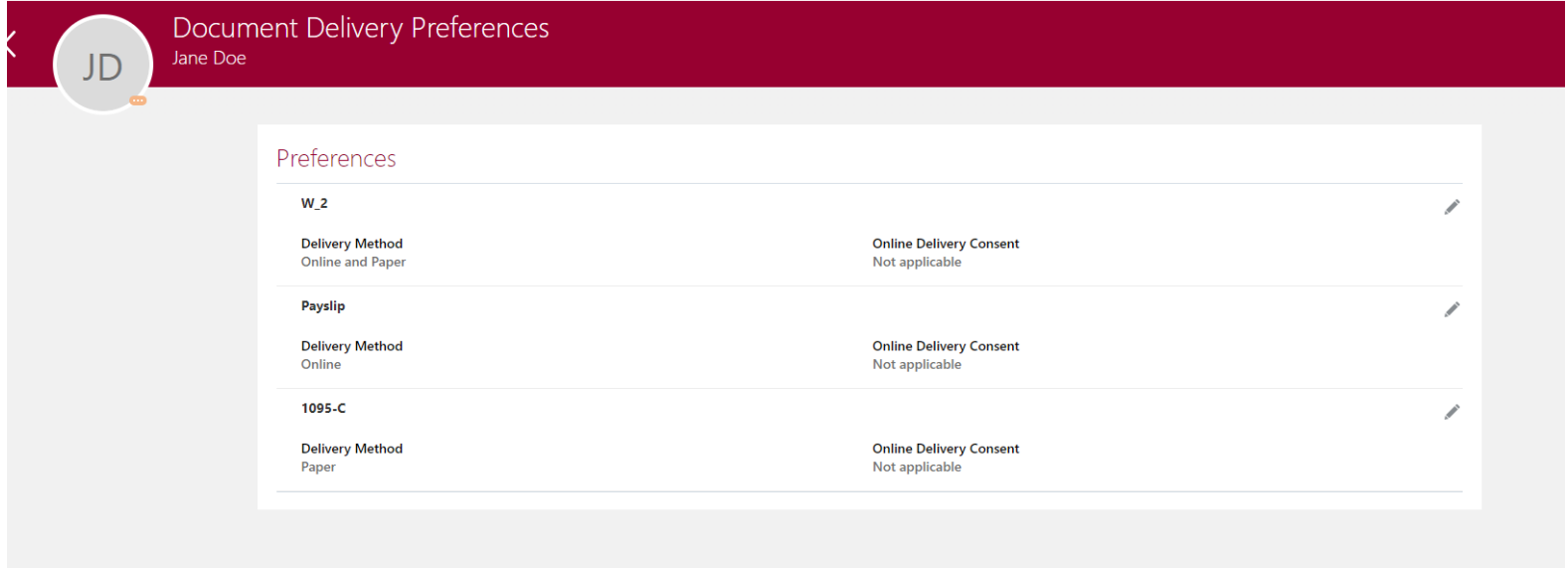


2. Select “Document Delivery Preferences” tile



3. Click on the pencil icon to update your delivery method

NOTE: You will have to update each individually.



The screenshot shows a user interface for 'Document Delivery Preferences' for Jane Doe. The header is a dark red bar with a circular profile picture containing 'JD' and the name 'Jane Doe'. Below the header, the title 'Preferences' is displayed. The main content area contains three rows, each representing a different document type with its delivery method and online consent status. Each row has a pencil icon on the right for editing.

Preferences	
W_2	
Delivery Method Online and Paper	Online Delivery Consent Not applicable
Payslip	
Delivery Method Online	Online Delivery Consent Not applicable
1095-C	
Delivery Method Paper	Online Delivery Consent Not applicable

View Payslips

1. Select “Me” on the homepage bar, then select “Pay” tile

Good morning, Jane Doe

The screenshot shows a user dashboard with a navigation bar at the top containing 'Me', 'Tools', and 'Others'. The 'Me' tab is highlighted with a red box. Below the navigation bar, there are two columns: 'QUICK ACTIONS' and 'APPS'. The 'APPS' column contains several circular tiles, with the 'Pay' tile (depicting a building icon) highlighted with a red box. Other tiles include 'Directory', 'Journeys', 'Time and Absences', 'Career and Performance', 'Personal Information', 'Benefits', 'Opportunity Marketplace', 'Personal Brand', 'Volunteering', 'Expenses', and 'Hiring'. A plus sign is visible below the 'Hiring' tile. At the bottom left, there is a 'Show More' link.

2. Select “My Payslips” tile to view payslips

The screenshot shows the 'Pay' page for Jane Doe. At the top, there is a dark red header with a back arrow and the text 'Pay'. Below the header is a circular profile picture with the initials 'JD' and the name 'Jane Doe'. The main content area features six tiles arranged in two rows. The 'My Payslips' tile in the top row is highlighted with a red box. The tiles are: 'Document Delivery Preferences', 'My Payslips', 'Payment Methods', 'Year-End Documents', 'Third-Party Payroll Documents', and 'Tax Withholding'. Each tile contains a brief description of its function.

Payment Methods (Direct Deposit)

1. Select “Me” on the homepage bar, then select “Pay” tile

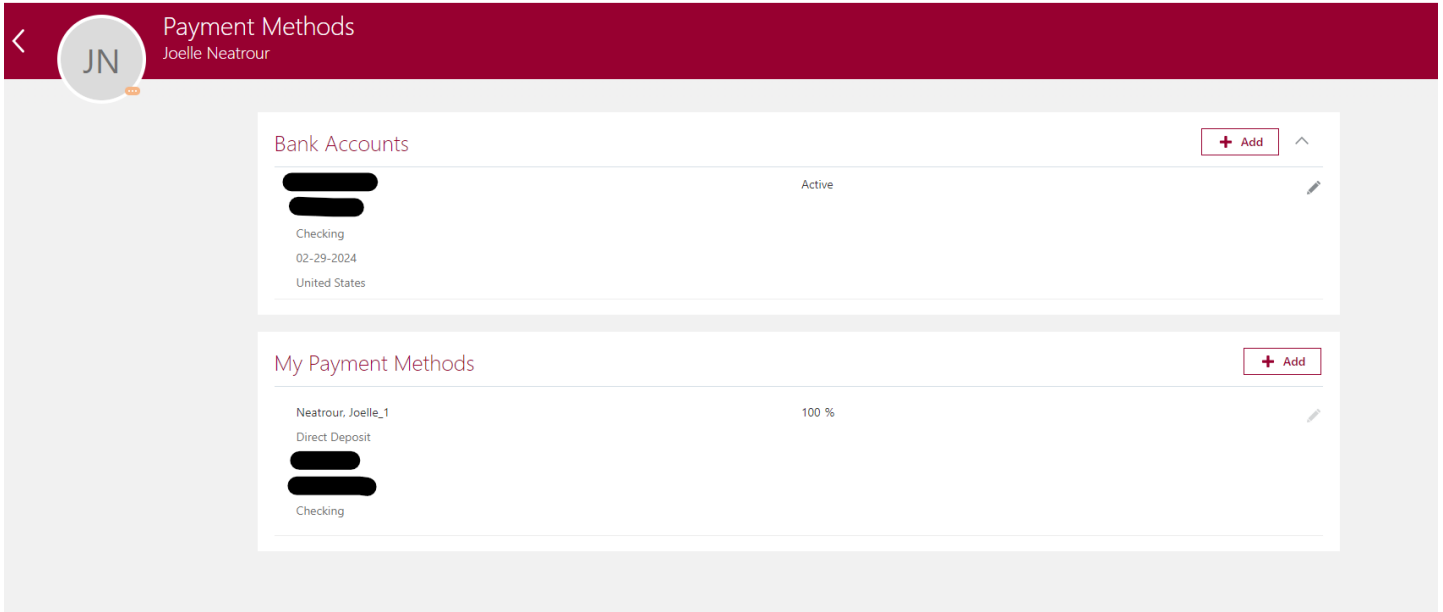
Good morning, Jane Doe

The screenshot shows a user interface with a top navigation bar containing 'Me', 'Tools', and 'Others'. The 'Me' tab is highlighted with a red box. Below the navigation bar, there are two main sections: 'QUICK ACTIONS' and 'APPS'. The 'QUICK ACTIONS' section lists various user-related tasks like 'Personal Details', 'Document Records', 'Identification Info', 'Contact Info', 'Family and Emergency Contacts', 'My Organization Chart', 'My Public Info', and 'Change Photo'. The 'APPS' section displays a grid of application tiles, including 'Directory', 'Journeys', 'Pay', 'Time and Absences', 'Career and Performance', 'Personal Information', 'Benefits', 'Opportunity Marketplace', 'Personal Brand', 'Volunteering', 'Expenses', and 'Hiring'. The 'Pay' tile is highlighted with a red box. A 'Show More' link is located at the bottom left of the 'APPS' section.

2. Select “Payment Methods” tile

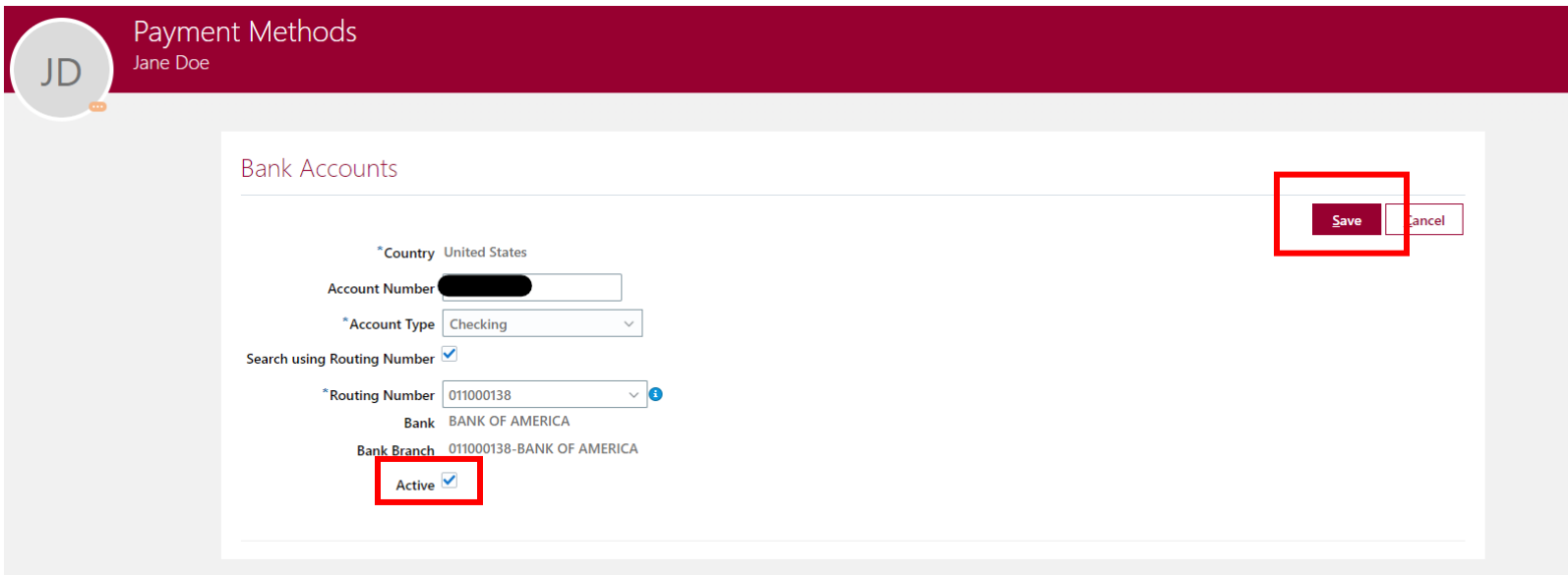
The screenshot shows the 'Pay' page for Jane Doe. The page has a dark red header with a back arrow and the word 'Pay'. Below the header is a circular profile picture with the initials 'JD' and the name 'Jane Doe'. The main content area is a grid of tiles. The 'Payment Methods' tile is highlighted with a red box. It contains the following text: 'Payment Methods', 'Define and prioritize salary payments details, such as payment type, payment amount and bank accounts details.' Other tiles include 'Document Delivery Preferences', 'My Payslips', 'Year-End Documents', 'Third-Party Payroll Documents', and 'Tax Withholding'.

3. You will be able to view and edit your current bank accounts and payment methods as well as add new ones



4. If you select edit, you will be able to update the account number, account type, routing, and status. To change the status to “inactive” uncheck the active box and save.

NOTE: The routing number should populate, but if it does not you can search for it in the drop down as well.



View or Edit Tax Withholdings

1. Select “Me” on the homepage bar, then select “Pay” tile


Good morning, Jane Doe

The screenshot shows a user dashboard with a navigation bar at the top containing 'Me', 'Tools', and 'Others'. The 'Me' tab is highlighted with a red box. Below the navigation bar, there are two columns: 'QUICK ACTIONS' and 'APPS'. The 'APPS' column contains several circular tiles, with the 'Pay' tile (depicting a building icon) highlighted with a red box. Other tiles include 'Personal Details', 'Document Records', 'Identification Info', 'Contact Info', 'Family and Emergency Contacts', 'My Organization Chart', 'My Public Info', 'Change Photo', 'Directory', 'Journeys', 'Time and Absences', 'Career and Performance', 'Personal Information', 'Benefits', 'Opportunity Marketplace', 'Personal Brand', 'Volunteering', 'Expenses', and 'Hiring'. A 'Show More' link is located at the bottom left of the dashboard.

2. Select “Tax Withholding” tile

The screenshot shows the 'Pay' page for Jane Doe. At the top, there is a header with a back arrow and the text 'Pay'. Below the header is a profile section with a circular avatar containing 'JD' and the name 'Jane Doe'. The main content area features a grid of tiles. The 'Tax Withholding' tile is highlighted with a red box. The tiles include: 'Document Delivery Preferences', 'My Payslips', 'Payment Methods', 'Year-End Documents', 'Third-Party Payroll Documents', and 'Tax Withholding'. Each tile contains a brief description of its function.


3. You will be able to view and verify your tax withholdings on this page. If you would like to edit your withholdings or filing status select the pencil icon. Once done, make sure to select “save”.
NOTE: To withhold extra money from your federal taxes you will be able to enter that amount after selecting the pencil icon next to the Federal section.



Tax Withholding


Doe, Jane : 654987654

Federal ^

Calculation Component	Start and End Dates	
Federal Taxes	02-27-2024	
Forms		
Federal		
Filing Status		
Single or Married filing separately		
Multiple Jobs		
Qualifying Dependents Amount		
0 USD		
Other Dependents Amount		
0 USD		

Regional + Add v ^

View

Calculation Component	Start and End Dates	
State Taxes	05-13-2024	
State		
PA		

- To view previous regional (state/local) taxes, select the drop-down box next to view and select "inactive"

Regional + Add ^

View: Active (selected), All, Inactive

Active

Calculation Component	Forms
Pennsylvania PSD	Start and End Dates 05-13-2024
State PA	PA > URSINUS COLLEGE
Tax Reporting Unit URSINUS COLLEGE	Start and End Dates 05-13-2024
Resident PSD Code 461703	Work PSD Code 461201
Resident School District	Work School District

View Current Timecard (Non-Exempt/Hourly ONLY)

1. Select “Me” on the homepage bar, then select “Time and Absences” tile

Good morning, Jane Doe

The screenshot shows the top navigation bar with three tabs: "Me", "Tools", and "Others". The "Me" tab is highlighted with a red box. Below the bar is a grid of application tiles. The "Time and Absences" tile, which features a clock icon, is highlighted with a red box. Other tiles include "Personal Details", "Document Records", "Identification Info", "Contact Info", "Family and Emergency Contacts", "My Organization Chart", "My Public Info", "Change Photo", "Directory", "Journeys", "Pay", "Career and Performance", "Personal Information", "Benefits", "Opportunity Marketplace", "Personal Brand", "Volunteering", "Expenses", and "Hiring". A "Show More" link is located at the bottom left of the app grid.

2. Select “Current Timecard” tile

The screenshot shows the "Time and Absences" page for Jane Doe. At the top, there is a header with a back arrow and the text "Time and Absences". Below the header is a circular profile picture with the initials "JD" and the name "Jane Doe". The main content area contains a grid of eight tiles. The "Current Time Card" tile, which has a clock icon and the text "Open your current time card", is highlighted with a red box. Other tiles include "Add Time Card", "Existing Time Cards", "Team Schedule", "Add Absence", "Absence Balance", "Existing Absences", and "Calendar".

3. You should be able to view your timecard on this page.

To enter time, select your “Assignment Number” from the drop down (this is the number assigned to your position), then select your “Payroll Time Type” from the drop down to select “Regular Pay” for normal hours worked. In this drop down you will also be able to select “On Call OT” etc. if this applies to you. Then enter the total quantity of hours worked for that payroll type in the corresponding days. Please “save” before leaving the page.

NOTE: You can view total hours worked for that date at the bottom of the grid and total hours per “Payroll Time Type” on the far-right side. You may also print by selecting the “actions” button in the upper right-hand corner.

Do NOT hit “SUBMIT” on the timecard until the end of the two-week pay period or else you will get a warning and an error message.

JD Jane Doe Carpenter Submitted

Person Number 654987654 Time Card Period 05-13-2024 to 05-19-2024

Cancel Save Actions Submit

Save and Close Print

05-13-2024 - 05-19-2024		Monday, May 13			Tuesday, May 14			Wednesday, May 15			Thursday, May 16			Friday, May 17	
Assignment Number *	Payroll Time Type *	Start	Stop	Quantity	Start	Stop	Quantity	Start	Stop	Quantity	Start	Stop	Quantity	Start	Stop
1 E654987654	On Call OT			8			8			8			8		32 hours
2	On Call OT														0 hours
3															0 hours
4															0 hours
5	Double Time														0 hours
6															0 hours
7	Holiday Pay														0 hours
8	Regular Pay														0 hours
9															0 hours
10															0 hours
11															0 hours
12															0 hours
Reported Hours		8 hours			8 hours			8 hours			8 hours				

4. To double check that you submitted your timecard for approval look next to your name for a blue “submitted” box.

NOTE: You can also double check the timecard period below your name

JD Jane Doe Carpenter Submitted

Person Number 654987654 Time Card Period 05-13-2024 to 05-19-2024

Cancel Save Actions Submit

View Calculated Time View Time Totals More Actions

05-13-2024 - 05-19-2024		Monday, May 13			Tuesday, May 14			Wednesday, May 15			Thursday, May 16			Friday, May 17	
Assignment Number *	Payroll Time Type *	Start	Stop	Quantity	Start	Stop	Quantity	Start	Stop	Quantity	Start	Stop	Quantity	Start	Stop

View Existing and Previous Timecards (Non-Exempt/Hourly ONLY)

1. Select “Me” on the homepage bar, then select “Time and Absences” tile

Good morning, Jane Doe

The screenshot shows a user interface with a top navigation bar containing 'Me', 'Tools', and 'Others'. The 'Me' tab is highlighted with a red box. Below the navigation bar, there are two columns: 'QUICK ACTIONS' and 'APPS'. The 'QUICK ACTIONS' column lists: Personal Details, Document Records, Identification Info, Contact Info, Family and Emergency Contacts, My Organization Chart, My Public Info, and Change Photo. The 'APPS' column contains a grid of tiles: Directory, Journeys, Pay, Time and Absences (highlighted with a red box), Career and Performance, Personal Information, Benefits, Opportunity Marketplace, Personal Brand, Volunteering, Expenses, and Hiring. A plus sign is located below the Hiring tile. At the bottom left, there is a 'Show More' link.

2. Select “Existing Timecard” tile

The screenshot shows the 'Time and Absences' page for Jane Doe. The page has a dark red header with a back arrow and the text 'Time and Absences'. Below the header is a circular profile picture with the initials 'JD' and the name 'Jane Doe'. The main content area is a grid of eight tiles: Current Time Card (Open your current time card), Add Time Card (Add a time card for a selected period), Existing Time Cards (Access all of your time cards - highlighted with a red box), Team Schedule (View your team's shifts and absences), Add Absence (Request an absence and submit for approval), Absence Balance (Review current plan balances and absences taken or requested), Existing Absences (View, change or withdraw existing absence requests), and Calendar (View your shifts, absences, and public holidays).

- On this page you can view all previous and existing timecards. To edit an existing timecard, you can either select the "Period Start Date" or select the three dots (...) and select "edit". You can also print by selecting the three dots (...) and selecting "Print".

NOTE: To clear the time period filter select the "X" button or select "clear". You'll then be able to filter by any time period you'd like or view all.

Ursinus College

< JD Existing Time Cards
Jane Doe

Search by status

Time Period 04-29-2024 - 05-13-2024 X Clear (1)

Period Start Date	Period End Date	Status	Reported Hours	Scheduled Hours	Absence Hours	Total Hours	Submission Date	Exception	Actions
05-13-2024	05-19-2024	Approved	32.00	40.00		32.00	05-13-2024		...

Edit
Print

Add Absence

1. Select “Me” on the homepage bar, then select “Time and Absences” tile

Good morning, Jane Doe

The screenshot shows a user interface with a navigation bar at the top containing 'Me', 'Tools', and 'Others'. The 'Me' tab is highlighted with a red box. Below the navigation bar, there are two columns of tiles. The left column is titled 'QUICK ACTIONS' and includes: Personal Details, Document Records, Identification Info, Contact Info, Family and Emergency Contacts, My Organization Chart, My Public Info, and Change Photo. The right column is titled 'APPS' and includes: Directory, Journeys, Pay, Time and Absences (highlighted with a red box), Career and Performance, Personal Information, Benefits, Opportunity Marketplace, Personal Brand, Volunteering, Expenses, and Hiring. A plus sign is located below the Hiring tile. At the bottom left, there is a 'Show More' link.

2. Select “Add Absence” tile

The screenshot shows the 'Time and Absences' page for Jane Doe. The page has a dark red header with a back arrow and the text 'Time and Absences'. Below the header is a circular profile picture with the initials 'JD' and the name 'Jane Doe'. The main content area contains a grid of eight tiles. The 'Add Absence' tile is highlighted with a red box. The tiles are: Current Time Card (Open your current time card), Add Time Card (Add a time card for a selected period), Existing Time Cards (Access all of your time cards), Team Schedule (View your team's shifts and absences), Add Absence (Request an absence and submit for approval), Absence Balance (Review current plan balances and absences taken or requested), Existing Absences (View, change or withdraw existing absence requests), and Calendar (View your shifts, absences, and public holidays).

3. Select the absence type from the drop-down menu

The screenshot shows the top header of the 'Add Absence' form for Jane Doe. The 'Type' dropdown menu is open, displaying a list of absence types: Bereavement Leave, Default PTO, Disability-Short Term, Floating Holiday, and Jury Duty. The 'Save and Close', 'Submit', and 'Cancel' buttons are visible in the top right corner.

4. Enter start and end date (duration/hours will auto-populate), select reason within details if prompted (only for certain absence types), and enter any comments. Once done select “submit” in the upper right-hand corner.

NOTE: If you save and close, your absence will not be submitted, and the hours will not be deducted from your balance. “Context Segment” in additional information section will always be blank.

The screenshot shows the 'Add Absence' form for Jane Doe with the 'Type' dropdown set to 'Bereavement Leave'. The 'When' section contains 'Start Date and Duration' (05-13-2024, 8 Hours) and 'End Date and Duration' (05-15-2024, 8 Hours) fields, both highlighted with red boxes. The 'Details' section shows the 'Reason' dropdown menu set to 'Brother-in-law', also highlighted with a red box. The 'Comments and Attachments' section is visible at the bottom. The 'Save and Close', 'Submit', and 'Cancel' buttons are highlighted with a red box in the top right corner.

Check Absence Balance

1. Select “Me” on the homepage bar, then select “Time and Absences” tile

Good morning, Jane Doe

The screenshot shows a user interface with a navigation bar at the top containing 'Me', 'Tools', and 'Others'. The 'Me' tab is highlighted with a red box. Below the navigation bar, there are two columns: 'QUICK ACTIONS' and 'APPS'. The 'QUICK ACTIONS' column lists: Personal Details, Document Records, Identification Info, Contact Info, Family and Emergency Contacts, My Organization Chart, My Public Info, and Change Photo. The 'APPS' column contains a grid of tiles: Directory, Journeys, Pay, Time and Absences (highlighted with a red box), Career and Performance, Personal Information, Benefits, Opportunity Marketplace, Personal Brand, Volunteering, Expenses, and Hiring. A plus sign is located below the Hiring tile. At the bottom left, there is a 'Show More' link.

2. Select “Absence Balance” tile

The screenshot shows the 'Time and Absences' page for Jane Doe. The page has a dark red header with a back arrow and the text 'Time and Absences'. Below the header is a circular profile picture with the initials 'JD' and the name 'Jane Doe'. The main content area is a grid of eight white tiles with blue icons and text. The tiles are: 'Current Time Card' (Open your current time card), 'Add Time Card' (Add a time card for a selected period), 'Existing Time Cards' (Access all of your time cards), 'Team Schedule' (View your team's shifts and absences), 'Add Absence' (Request an absence and submit for approval), 'Absence Balance' (Review current plan balances and absences taken or requested - highlighted with a red box), 'Existing Absences' (View, change or withdraw existing absence requests), and 'Calendar' (View your shifts, absences, and public holidays).

3. You will be able to view your balances on this page as of current date

NOTE: You can also add an absence from this page by selecting the action button in the upper right-hand corner and following the same steps in the “Add Absence” section

Absence Balance
Jane Doe

Plan Balances

Plan	Balance As-of Date	Balance
Default PTO	Current date	0 Hours
Floating Holiday	Current date	0 Hours
Wellness	Current date	0 Hours

Actions
Add Absence

4. If you select a plan name on this page you will be redirected to view each absence you’ve recorded for that specific plan. To see the dates of the absences you’ve recorded for this plan look under the “details” section.

NOTE: You can also change the balance-as-of date

Plan Balance
Joelle Neatrou

Plan: Default PTO

*Balance As-of Date: 05-13-2024

Plan Balance **22 Hours**

Summary

Amounts in Hours

Category	Amount
Plan Term 07-01-2023 - 06-30-2024	
Accruals	30
Absences	-8
Total Balance	22

Details



Amounts in Hours

All

05-10-2024 Absence	-8
07-01-2023 Initial balance	30

Year-End Details



Amounts in Hours

06-30-2023 Balance	0
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View Existing Absences

1. Select “Me” on the homepage bar, then select “Time and Absences” tile

Good morning, Jane Doe

The screenshot shows a user interface with a navigation bar at the top containing 'Me', 'Tools', and 'Others'. The 'Me' tab is highlighted with a red box. Below the navigation bar, there are two columns: 'QUICK ACTIONS' and 'APPS'. The 'QUICK ACTIONS' column lists: Personal Details, Document Records, Identification Info, Contact Info, Family and Emergency Contacts, My Organization Chart, My Public Info, and Change Photo. The 'APPS' column contains a grid of app tiles: Directory, Journeys, Pay, Time and Absences (highlighted with a red box), Career and Performance, Personal Information, Benefits, Opportunity Marketplace, Personal Brand, Volunteering, Expenses, and Hiring. A plus sign is located below the Hiring tile. At the bottom left, there is a 'Show More' link.

2. Select “Existing Absences” tile

The screenshot shows the 'Time and Absences' page. At the top, there is a header with a back arrow and the text 'Time and Absences'. Below the header is a profile section with a circular avatar containing the initials 'JD' and the name 'Jane Doe'. The main content area is a grid of eight tiles: Current Time Card (Open your current time card), Add Time Card (Add a time card for a selected period), Existing Time Cards (Access all of your time cards), Team Schedule (View your team's shifts and absences), Add Absence (Request an absence and submit for approval), Absence Balance (Review current plan balances and absences taken or requested), Existing Absences (View, change or withdraw existing absence requests - highlighted with a red box), and Calendar (View your shifts, absences, and public holidays).

- You will be able to view absences you have submitted for each plan on this page, as well as change or withdraw absences request. To edit an absence, you have already submitted select the pencil icon on the far-right side of the absence.

NOTE: You can also add an absence from this page by selecting “Add” in the upper right-hand corner and following the same steps as listed in the “Add Absence” section. You may also view absences on this page from over six month ago or for the future by selecting the drop-down button next to “Last 6 months” and select how far back you would like to view.

Existing Absences
Joelle Neatrou

Absences

Last 6 months

Search by type or status

Sort By Date

Default PTO: 8 Hours
05-10-2024 - 05-10-2024

Awaiting approval

+ Add

[Pencil icon]

- To delete an absence you have entered, select the pencil icon as shown above, then select “delete” in the upper right-hand corner.

NOTE: If you are editing the absence, make edits as needed then click “submit”.

Edit Absence
Joelle Neatrou

Type Default PTO

When

Edit Entries

*Start Date and Duration
05-10-2024 8 Hours

*End Date and Duration
05-10-2024

Absence Duration 8 Hours

Projected Balance Calculate

Delete Submit Cancel

View Schedule and Absences on Calendar

1. Select “Me” on the homepage bar, then select “Time and Absences” tile

Good morning, Jane Doe

The screenshot shows a user interface with a top navigation bar containing 'Me', 'Tools', and 'Others'. The 'Me' tab is highlighted with a red box. Below the navigation bar, there are two main sections: 'QUICK ACTIONS' and 'APPS'. The 'QUICK ACTIONS' section lists various user-related tasks like 'Personal Details', 'Document Records', etc. The 'APPS' section displays a grid of application tiles. The 'Time and Absences' tile, which features a clock icon, is highlighted with a red box. Other tiles include 'Directory', 'Journeys', 'Pay', 'Career and Performance', 'Personal Information', 'Benefits', 'Opportunity Marketplace', 'Personal Brand', 'Volunteering', 'Expenses', and 'Hiring'. A 'Show More' link is located at the bottom left of the 'APPS' section.

2. Select “Calendar” tile

The screenshot shows the 'Time and Absences' page for Jane Doe. The page has a dark red header with a back arrow and the text 'Time and Absences'. Below the header is a circular profile picture with the initials 'JD' and the name 'Jane Doe'. The main content area is a grid of white tiles with blue icons and text. The tiles include: 'Current Time Card' (Open your current time card), 'Add Time Card' (Add a time card for a selected period), 'Existing Time Cards' (Access all of your time cards), 'Team Schedule' (View your team's shifts and absences), 'Add Absence' (Request an absence and submit for approval), 'Absence Balance' (Review current plan balances and absences taken or requested), 'Existing Absences' (View, change or withdraw existing absence requests), and 'Calendar' (View your shifts, absences, and public holidays). The 'Calendar' tile in the bottom right corner is highlighted with a red box.

- Calendar will automatically show the current week schedule. To change the view to the entire month, select the calendar icon on the upper left-hand side.

NOTE: If you select “Show Filters” on the upper right-hand side you will be able to select view only work shifts or absences. The default is set to view all.

JN
Calendar
Joelle Neatrou

Business Title Assistant Director of Human Resources

Date
Today
May 12, 2024 - May 18, 2024
[Hide Filters](#)

	Sun 5/12	Mon 5/13	Tue 5/14	Wed 5/15	Thu 5/16	Fri 5/17	Sat 5/18
12:00 AM		12:00 AM	12:00 AM	12:00 AM	12:00 AM	12:00 AM	
1:00 AM		12:00 AM - 12:00 AM (8 hrs) 40 Hour Work Schedule-8 Hour Elapsed Shift	12:00 AM - 12:00 AM (8 hrs) 40 Hour Work Schedule-8 Hour Elapsed Shift	12:00 AM - 12:00 AM (8 hrs) 40 Hour Work Schedule-8 Hour Elapsed Shift	12:00 AM - 12:00 AM (8 hrs) 40 Hour Work Schedule-8 Hour Elapsed Shift	12:00 AM - 12:00 AM (8 hrs) 40 Hour Work Schedule-8 Hour Elapsed Shift	
2:00 AM							
3:00 AM							
4:00 AM							
5:00 AM							
6:00 AM							
7:00 AM							
8:00 AM							
9:00 AM							
10:00 AM							
11:00 AM							

View

All

Work shifts ■

Absences ■

Public holidays ■

View Team Schedule

1. Select “Me” on the homepage bar, then select “Time and Absences” tile

Good morning, Jane Doe

The screenshot shows a user interface with a top navigation bar containing 'Me', 'Tools', and 'Others'. The 'Me' tab is highlighted with a red box. Below the navigation bar, there are two main sections: 'QUICK ACTIONS' and 'APPS'. The 'QUICK ACTIONS' section lists various user-related tasks like 'Personal Details', 'Document Records', etc. The 'APPS' section displays a grid of application tiles. The 'Time and Absences' tile, which features a clock icon, is highlighted with a red box. Other tiles include 'Directory', 'Journeys', 'Pay', 'Career and Performance', 'Personal Information', 'Benefits', 'Opportunity Marketplace', 'Personal Brand', 'Volunteering', 'Expenses', and 'Hiring'. A 'Show More' link is located at the bottom left of the 'APPS' section.

2. Select “Team Schedule” tile

The screenshot shows the 'Time and Absences' page for Jane Doe. The page has a dark red header with a back arrow and the text 'Time and Absences'. Below the header is a circular profile picture with the initials 'JD' and the name 'Jane Doe'. The main content area contains a grid of eight tiles. The 'Team Schedule' tile, which has a calendar icon and the text 'View your team's shifts and absences', is highlighted with a red box. Other tiles include 'Current Time Card', 'Add Time Card', 'Existing Time Cards', 'Add Absence', 'Absence Balance', 'Existing Absences', and 'Calendar'.

3. Team Schedule will automatically show the current week schedule. To change the view to another week, select the arrows (< >) next to the “Today” box.

NOTE: If you select “Show Filters” on the upper left-hand side next to the search box you will be able to filter. The default view is set to public holidays, published schedule, and absences.

The screenshot displays the 'Team Schedule' interface. At the top left, there is a search bar with the placeholder text 'Search by person or shift name'. Below the search bar, there are sections for 'Saved Search' (with a dropdown menu set to 'Today for Peers' and a 'Save' button) and 'Filters' (with a 'Reset' button and 'Expand All'/'Collapse All' options). The 'Filters' section includes a 'Date' field (set to 'mm-dd-yyyy') and a 'Type' section with checkboxes for 'Public holidays', 'Published schedule', 'Absence', 'Employment schedule', and 'Other availability'. A 'Line Manager' section is also visible with a checkbox for 'Cale Nelson'. The main area shows a weekly schedule grid for the week of May 12, 2024, to May 18, 2024. The grid has columns for each day (Sun 12, Mon 13, Tue 14, Wed 15, Thu 16, Fri 17, Sat 18) and rows for employees. Each employee row shows a profile picture, name, and title, followed by a grid of blue blocks representing 8-hour shifts. The first employee is 'Joelle Neatrou' (E1001009, Assistant Director of Human Resources). Other employees are represented by redacted names. The 'Today' box is highlighted in the navigation area.