Employee Services Portal

User's Guide

HARRIS
School Solutions

Contents

Use the Employee Services Portal (ESP) to conveniently view your paychecks, W-2s, and leave information online. You can also view your tax information (W-4) and edit your personal information.

The Employee Services Portal is a secure site. It protects your personal and tax information by:

- Using Secure Sockets Layer (SSL) technology to safeguard and encrypt your personal data for transmission.
- Requiring you to create a login name and password to view your paychecks and W-2s online.

Enrolling in the ESP

Before you can enroll, you must:

- Be a valid employee of the school district or city/county.
- Make sure the school district or city/county has issued you at least one valid paycheck.

1. Use your web browser to access the ESP.

2. Click on the **Enroll in Employee Self Services** link. The *Enrollment* window opens.

Enter account information

Note: All fields marked with an asterisk are required.

1. Complete the fields as described below.

   - **Name**: Enter your name EXACTLY as it appears on your paycheck. If your name isn't entered exactly as it is on your paycheck, you will get a message that payroll information is not on file and you won't be able to enroll.
   - **SSN**: Enter your Social Security number. Do not include dashes.
   - **Phone Number**: Enter your phone number, including the area code. Do not use dashes.
   - **Ext**: Enter your extension if applicable.
   - **Email**: Enter a VALID email address. The email address you enter must also be unique. In other words, if you want to create two separate ESP accounts, you must use a different email address for each one. The system will send information regarding your account to this address.
   - **Confirm Email**: Re-enter your email address for validation purposes.

2. Click the Next button to proceed to the *Login Information* page.

> Click the **Help** button to display detailed field descriptions and instructions for completing the enrollment process.

Enter login information

Note: All fields marked with an asterisk are required.

1. Complete the fields as described below.

   - **Login**: You will use this name to sign into the Employee Services Portal. Enter a login name containing 6 - 12 characters. This field is case sensitive. The name must be unique and should not contain any spaces or special characters, such as &, >, +, $, @. You will receive an error message if the login name already exists.
   - **Password**: Enter a password containing 6 - 12 characters. At least one character must be numeric — for example, penny1. This field is case sensitive. Your password should be different from your login name. It should not contain any spaces or special characters such as &, >, +, $, @.
   - **Confirm Password**: Re-enter your password exactly as you did in the above field.
   - **Help Question**: Select a help question from the list box. The system uses this for verification purposes if you forget your login name and/or password.
   - **Help Question Answer**: Enter the answer to the help question you selected in the above field.

2. Click the Next button to proceed to the *Email Options* page.

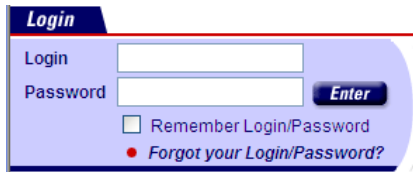## Select email options

1. The **Personal Information Receipt** box is checked by default which means the portal will send you a notice via email when you make changes to your personal information in the Edit Personal Information window. If you do not want to receive such notice, uncheck this box.

2. Click the Finish button to complete the enrollment process. The system returns you to the Login window. Use your newly created login name and password to enter the Employee Services Portal.
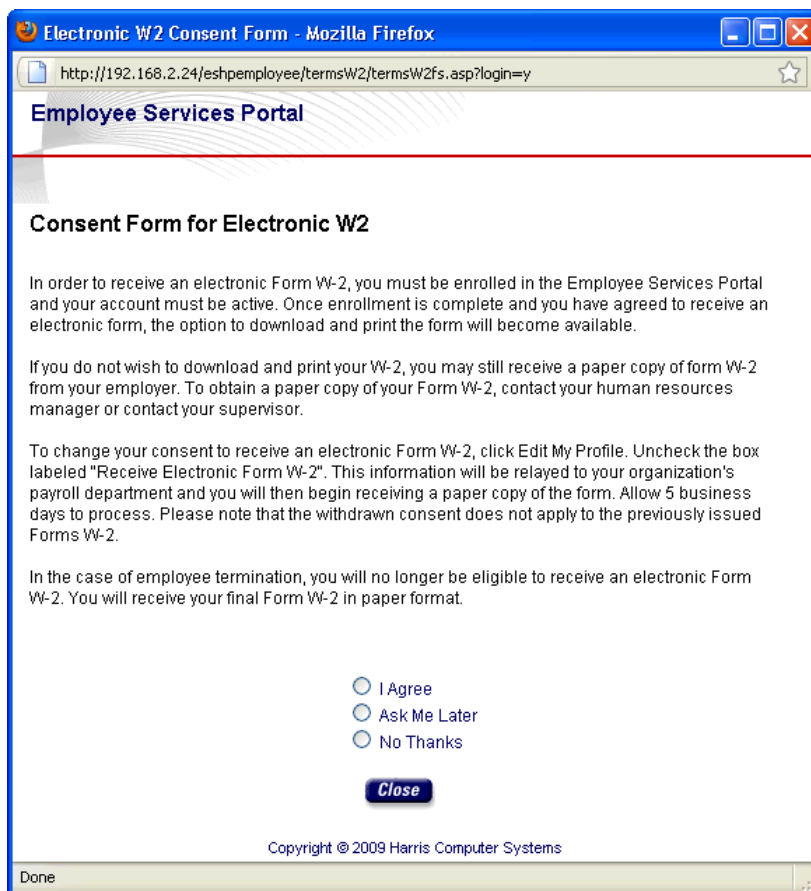
Using ESP

Logging in & W-2 consent form

Once you've completed the enrollment process, the system automatically displays the Login window.

1. Enter your login name and password in the appropriate fields.
2. (Optional) Check the **Remember Login/Password** box to have the system retain your login and password.
3. Click the **Enter** button to display the main menu.

   - **Terms & Conditions**: The first time you log in, the terms & conditions for using the Employee Services Portal will be displayed. Please read them carefully. Check the **Do not show this upon login** box if you do not want these terms to display each time you enter the system. Click the Close button when finished.
   - **W-2 Consent Form**: If your organization is setup to provide electronic W-2s *and* if you've logged on during the consent period, the following window will open.


Click one of the radio buttons, and click **Close**. **Note**: If you agree to receive an electronic W-2 and then later want to withdraw your consent, you can do so using Edit My Profile. See "Editing your online profile" on page 15.

- After closing any other windows, the *Welcome* window opens. Navigate through the site by selecting items from the menu in the left sidebar.

Logging out

When you are finished using the ESP, look for the Sign Out button in the upper right corner of any window.
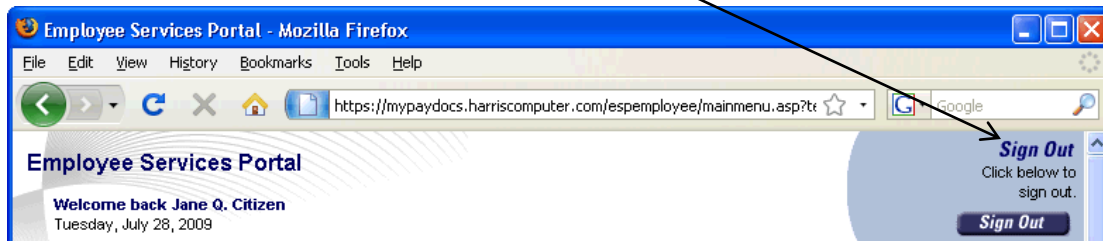
1. Click the **Sign Out** button. A popup window opens.

2. Click the **Yes** button. The default window set by the portal administrator opens.

Adobe Reader

ESP displays paychecks and W-2s in PDF format, and you must have Adobe Acrobat Reader to view documents in PDF format.
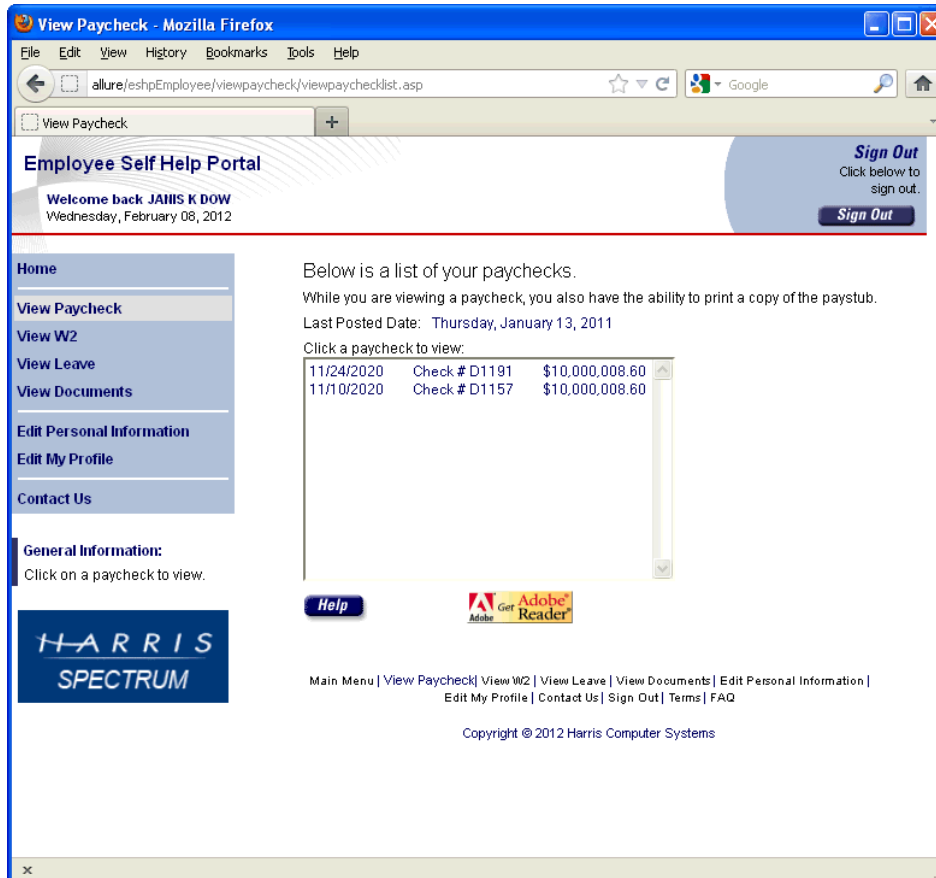
If you don't have this program, select the Get Adobe Reader icon at the bottom of the *View Paycheck List* or *View W2 List* window to download the FREE program.

Viewing your paycheck

To view your paycheck online, select the View Paycheck menu option.
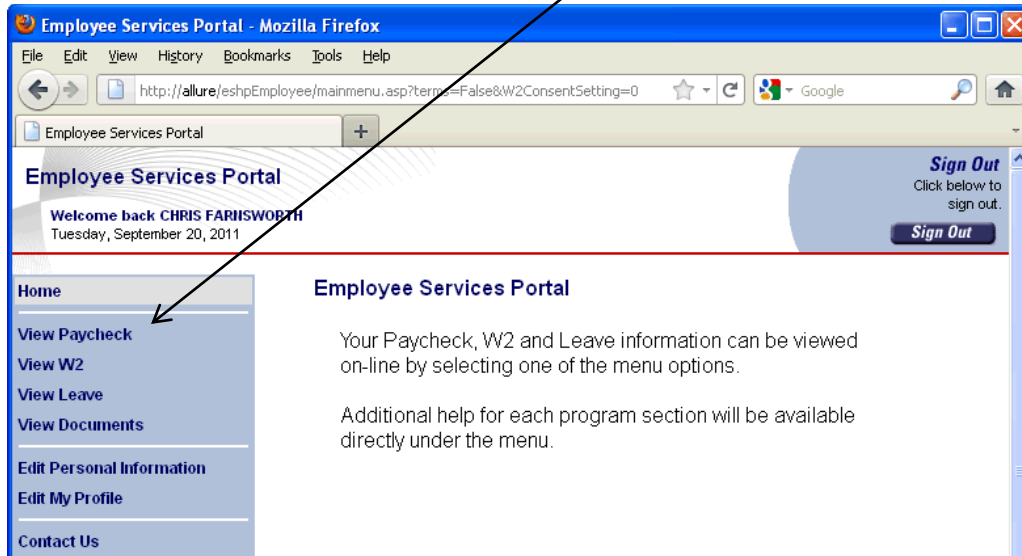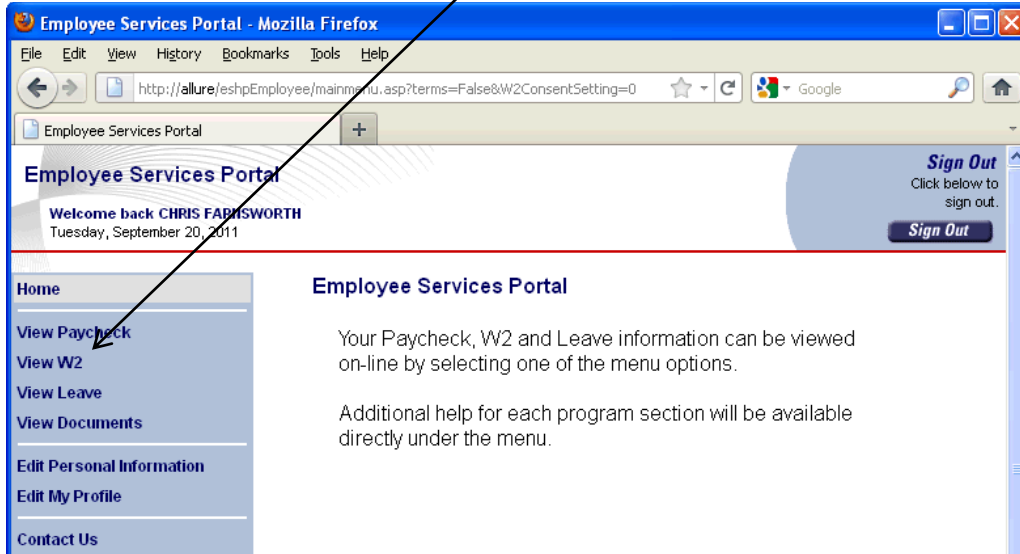

The *View Paycheck List* window opens.

- Paychecks display by date, with the most recent one issued at the top of the list.
- You can only select one paycheck at a time, but you can return to this screen later to view your paycheck for a different date.
- **Remember**: You must have Acrobat Reader installed on your computer to be able to view your paycheck.
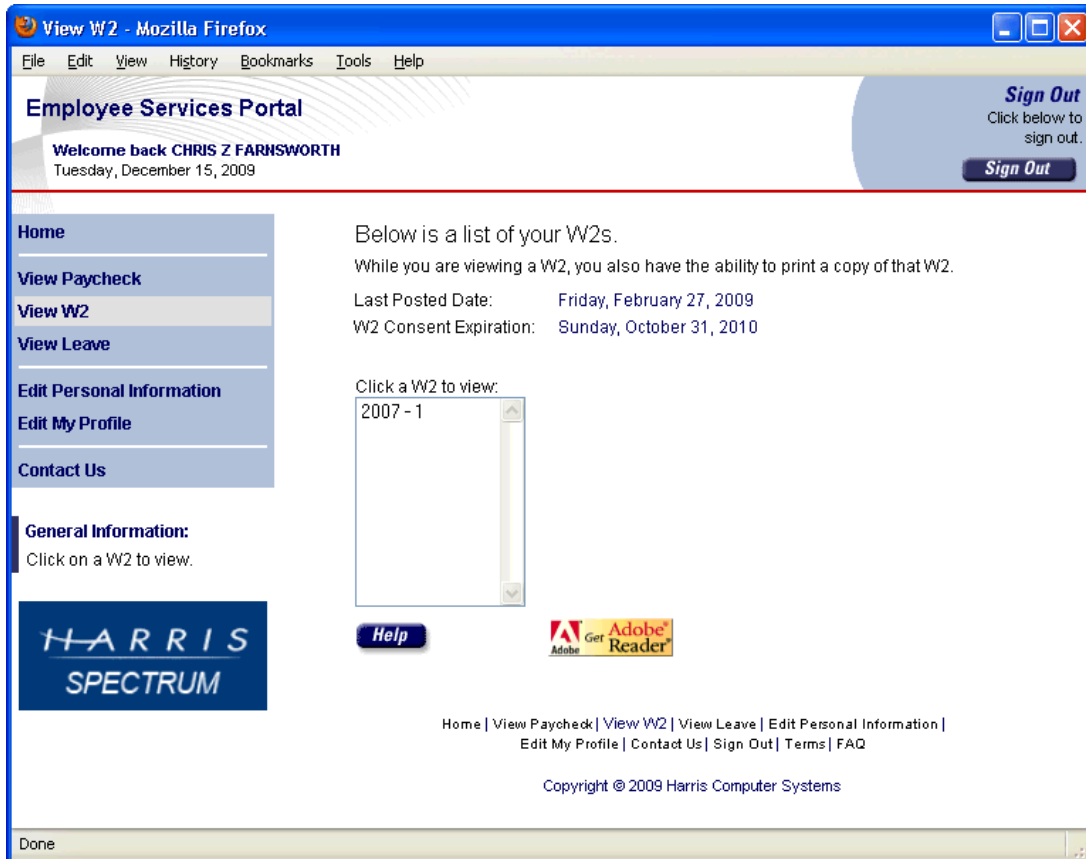
Select the paycheck you want to view.

Viewing your W-2

To view your W-2 online, select the View W2 menu option.

The *View W2 List* window opens.

- W-2s display by date, with the most recent one issued at the top of the list.
- You can only select one W-2 at a time, but you can return to this screen later to view your W-2 for a different date.
- If your organization is setup to provide *and* you've consented to receive electronic W-2s, the W2 Consent Expiration date will be displayed. After that date, you will again need to provide consent in order to receive an electronic W-2 for the next year.
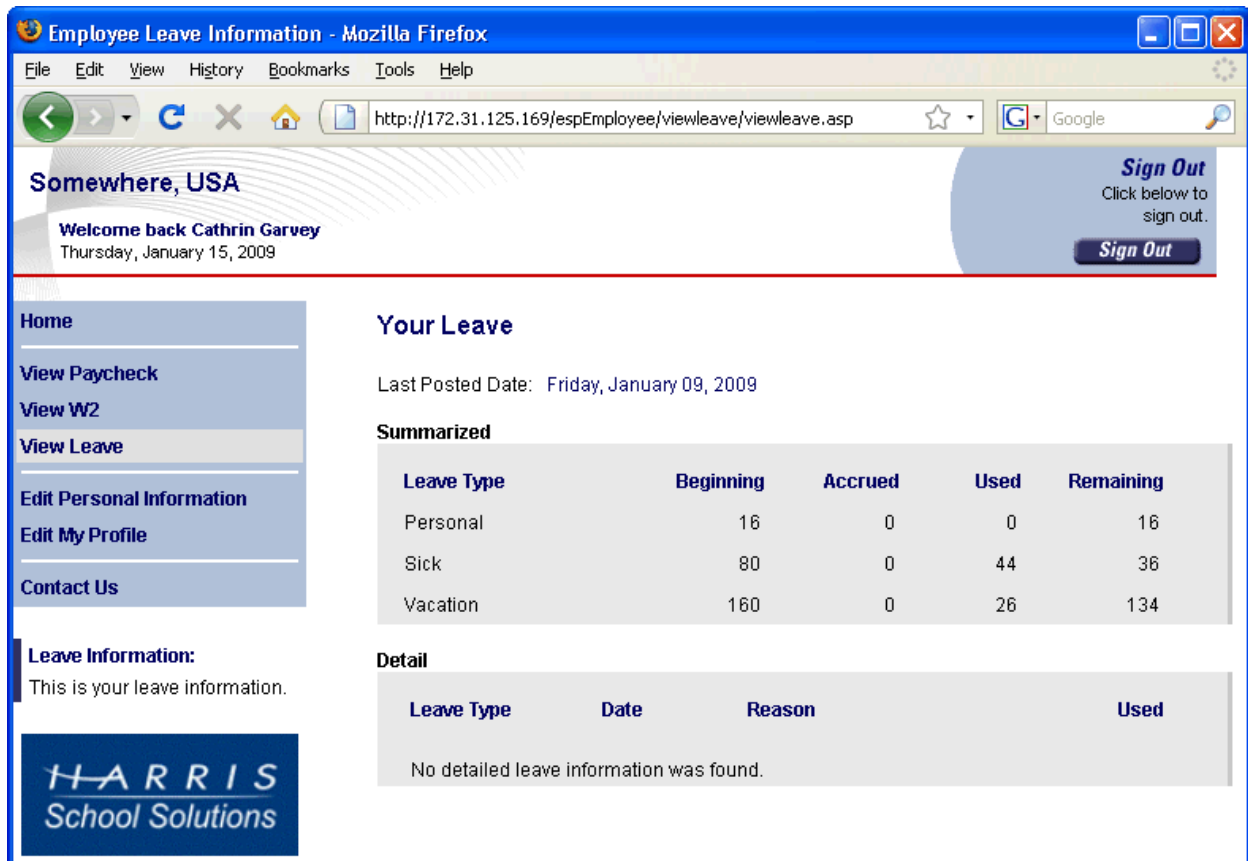- **Remember**: You must have Acrobat Reader installed on your computer to be able to view your W-2.

Select the W-2 you want to view.

Viewing your leave

To view your leave online, select the View Leave menu option.
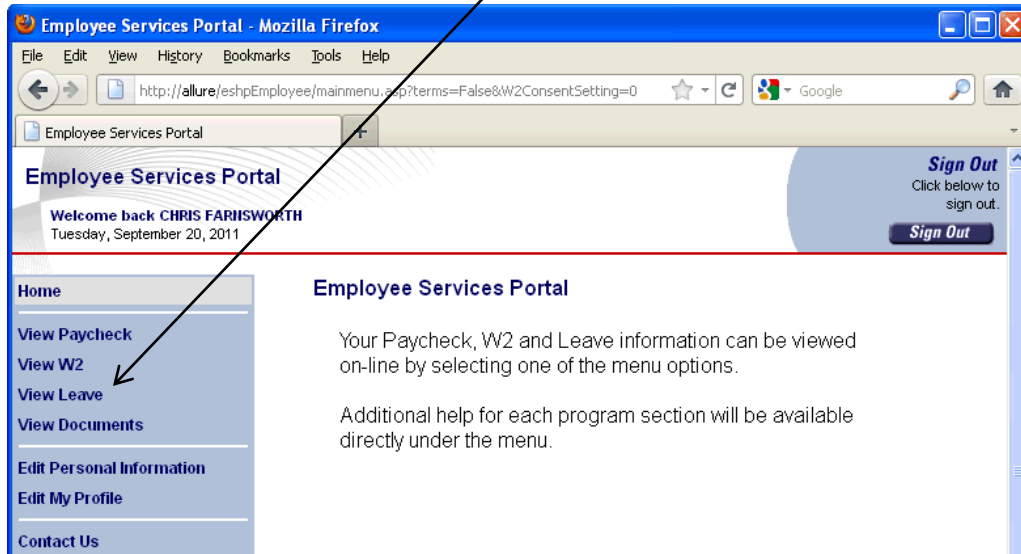
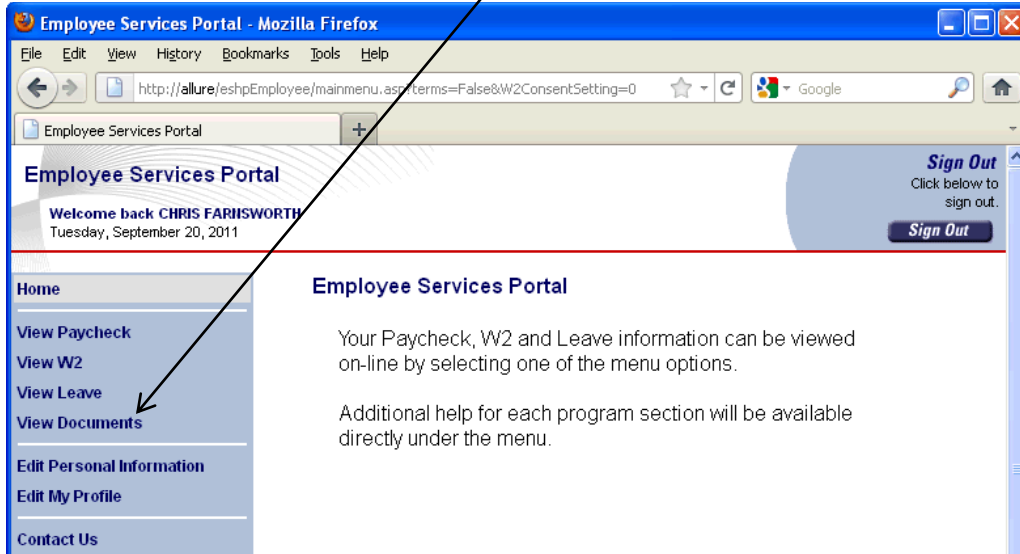The *View Leave* window opens.

Your current leave information may be different than that displayed on the portal because the leave on the portal is whatever was current the last time that a payroll was run and checks were posted on the portal.
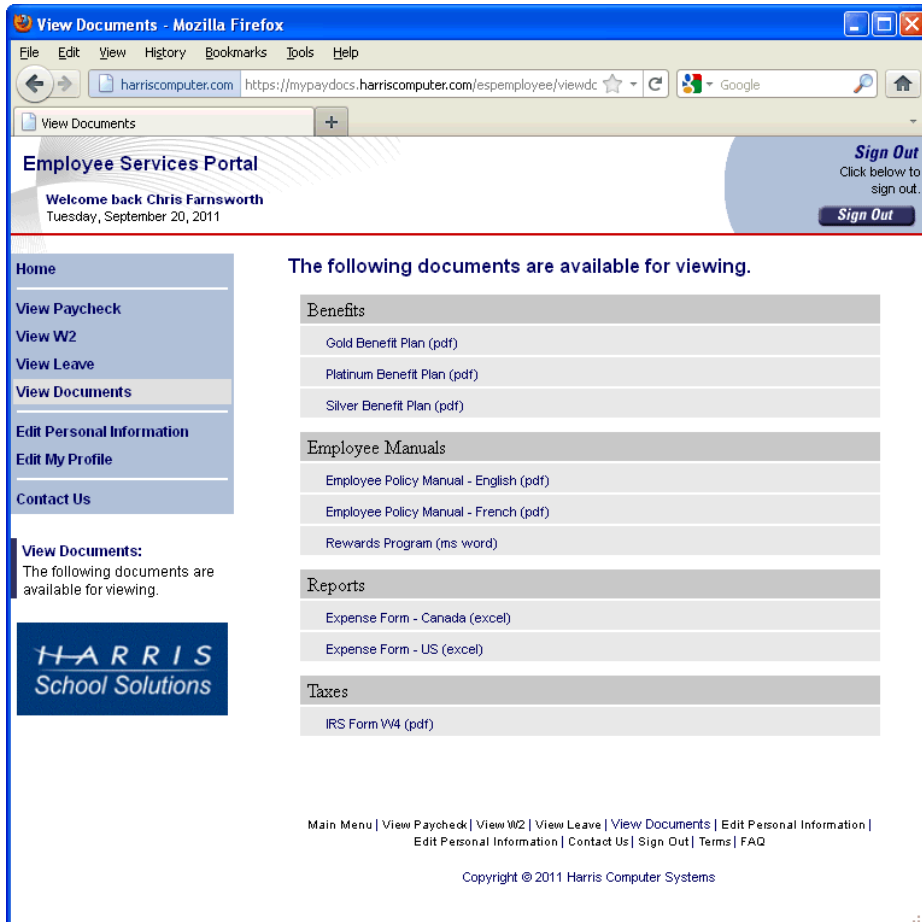
So if you have earned or used leave since the last time the checks were posted, the leave displayed on the portal will not be current.

Viewing / downloading documents posted by your organization

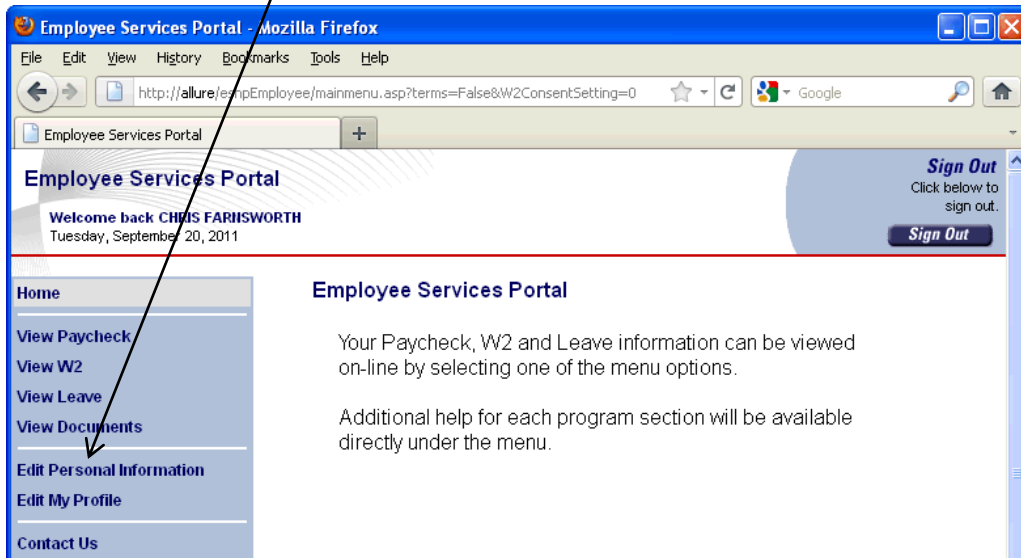To view documents, select the View Documents menu option.

The *View Documents* window opens.

Click on the name of the document you want to view. Depending on how your browser is configured, the document will open in a new tab or window, or you'll be asked if you want to open or save the document.

Editing your personal & tax information

1. Select **Edit Personal Information** from the menu.

The *Edit Personal Information* window opens.

*   Your name, SSN, employee number, job description, marital status and legal name are display only and cannot be edited in this window. Contact your HR representative if you need to change any of these fields.

- Non self-explanatory fields:
  - Job description: The federal government prescribes these EEO job classification codes and their descriptions.
  - Name: Your name as you entered it when you enrolled in the Employee Services Portal.
  - Marital status codes: M=married, S=single, W=widowed, D=divorced, X=Separated
  - Legal name: Your legal name as it appears on your Social Security card, if different from the name you entered when you enrolled in the Employee Services Portal.

2. Make any needed changes.

3. Click the **Finish** button to return to the Welcome window, or click the **Next** button to display the *Tax Information* section.

The *Tax Information* window
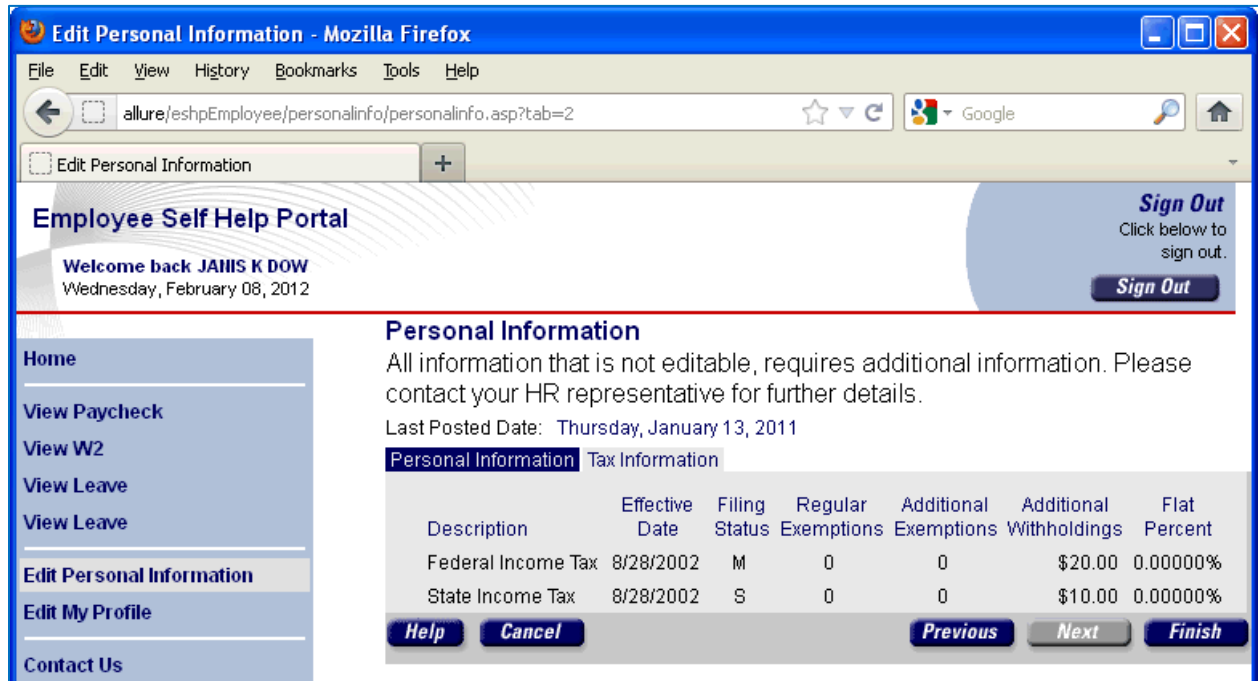
- These fields are all display only and cannot be changed in this window. Contact your HR representative if you need to change any of these fields.
- Non self-explanatory fields:
  - Filing Status: The marital status you entered on your W2.
  - Regular Exemptions: The number of regular exemptions that apply to your account for this tax type and year.
  - Additional Exemptions: The number of additional exemptions that apply to your account for this tax type and year.
  - Additional Withholdings: The dollar amount of additional withholdings that apply to your account for this tax type and year.
  - Flat Percent: The flat percentage applied to your account for this tax type and year.

4. After reviewing the tax information, click the **Finish** button to return to the Welcome window.

Note: Once the Finish button is clicked, an email containing the new data is sent to the site administrator. The changes will NOT be visible on the website until after another payroll is run and the new checks posted to the portal.
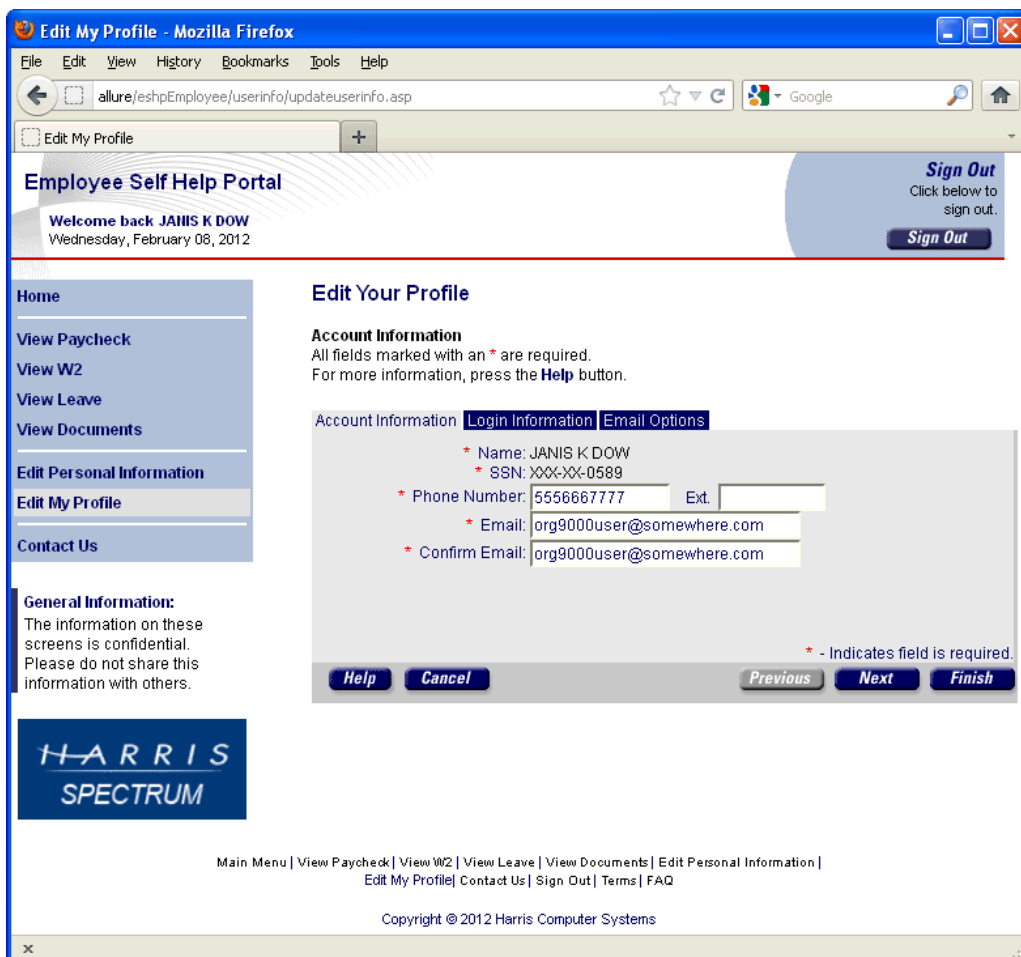

Editing your online profile

Your profile contains the information you entered during the enrollment process and your consent to receive an electronic W-2. All changes you make to your online profile are updated immediately.

1. Select **Edit My Profile** from the menu.
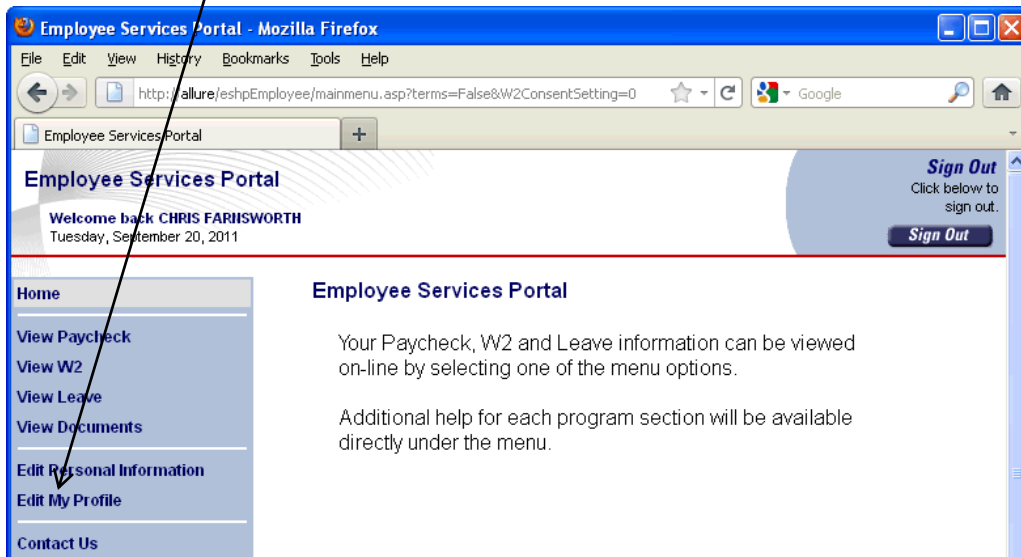
The *Edit My Profile* window opens.

Your name and SSN are display only and cannot be edited in this window. Contact your HR representative if you need to change them.

2. Change the other fields as needed. **Note**: Unchecking the Withdraw W2 Consent box will withdraw your consent to receive an electronic W-2. If you uncheck the box after the W-2 consent period, it will be your responsibility to request a paper copy of your W-2.

3. Click the **Finish** button to return to the Welcome window, or click the **Next** button to display the *Login Information* section.

For security reasons, your password displays as asterisks (***).

4. Make changes as needed.

5. Click the **Finish** button to return to the Welcome window, or click the **Next** button to display the *Email Options* section.

6. In the example above, the **Personal Information Receipt** box is checked which means the portal will send you a notice via email when you make changes to your personal information in the Edit Personal Information window. If you do not want to receive such notice, uncheck this box.

7. Click the **Finish** button to return to the Welcome window.

FAQs

Answers to some of the most frequently asked questions about the application are listed below:

What should I enter as my login name and password?

Enter any combination of letters and numbers you'll remember. Login names and passwords are case sensitive, must contain six to twelve characters, and should not contain any spaces or special characters (i.e. &, >, *, $, @). Passwords must contain at least one numeric character — for example, penny1.

What if I forget my login name and/or password?

Select the **Forgot Login/Password?** link, and enter your email address. Your help question pops-up. Once you correctly answer it, you'll receive an email with your login name and a new, system-generated password.

How do I end my session?

End your ESP session by simply clicking the **Sign Out** button at the top right-hand corner of any screen.

How do I contact support?

Simply select the **Contact Us** menu option for names, phone numbers and email addresses of your district's HR technical support team and webmaster.