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User Reference

# Employee Self Service v10x

By CMiC

**CMiC**  
*Computer Methods*  
*international Corp.*

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# Employee Self Service – Administrator Guide

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## Overview – Employee Self Service Administrator Guide

CMiC's Employee Self Service (ESS) is a web-based application that can be used by employees, applicants and administrators to perform the following tasks online.

This guide is for ESS Administrators, and contains documentation about the screens relevant to administrators. For details about the screens relevant to employees, please refer to the ESS Employee's user guide.

### For Employees

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For employees, the ESS module can be used to:

- view and print pay stubs
- view and update Employee Profile details, such as: address, emergency contacts, skills, certifications and licenses, education, memberships, and tax-relevant information
- submit benefit and deduction elections
- report benefit/deduction qualifying events
- apply for leaves
- view interim and annual evaluations
- submit training requests

Changes and requests are submitted to the employee's manager for approval, and the Payroll and HR modules are updated once the requests are approved.

### For Applicants

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For applicants, the ESS module is used to:

- create online applicant profile and apply for an open position online
- view application status and history

### For Administrators

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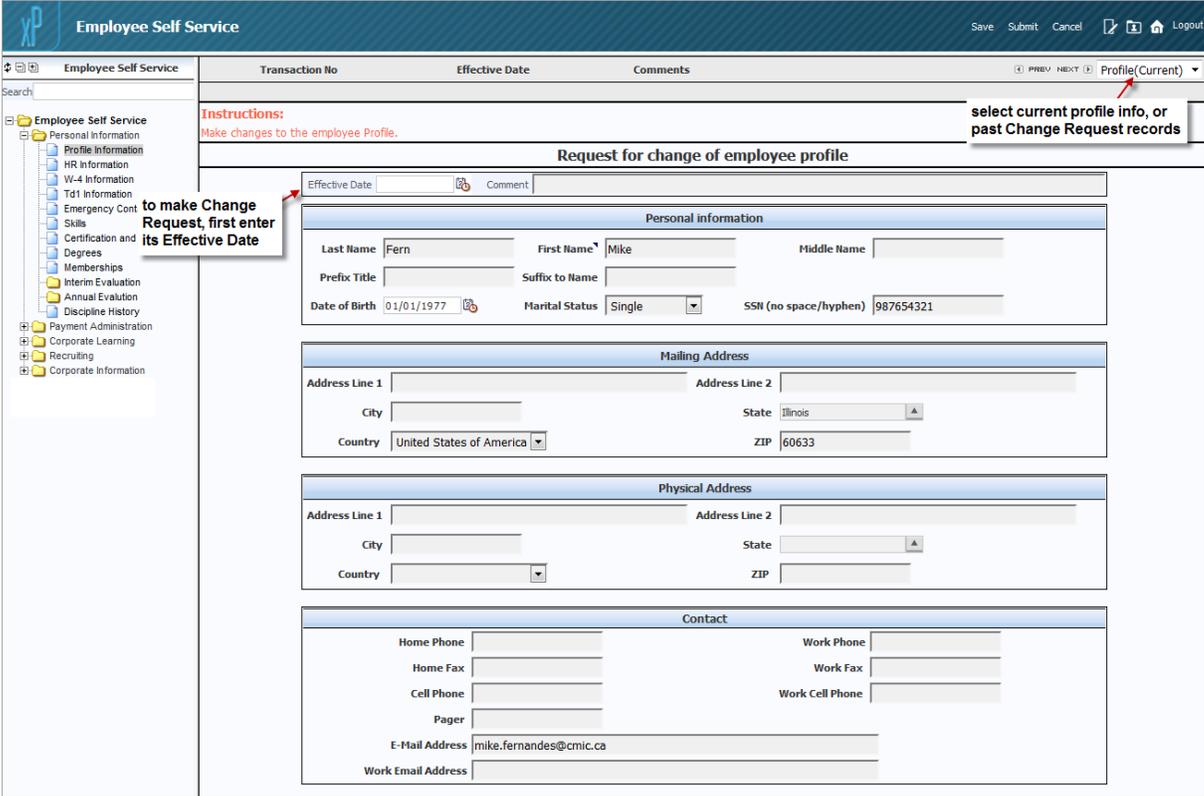
For administrators, the ESS module is used to:

- set up ESS module
- set up Open Enrollment and Qualifying Events
- approve or deny Change Requests for Employee Profile details
- approve or deny submitted benefit and deduction elections
- approve or deny submitted qualifying events
- approve or deny training requests

- submit job requisitions to HR for new hires
- review applicants' applications

# Personal Information

## Profile Information



Employees can use this screen to view and modify their basic profile information.

Then way in which modifications are made is by selecting the current Profile, **Profile (Current)**, from the drop-down list at the top right corner of the screen, and creating a Change Request. Note, however, only one Change Request is allowed at a time. Once the Change Request is created, it is submitted for approval.

The status of the Change Request can be:

Status	Details
<b>Pending</b>	When a change is made to the current Profile, <b>Profile (Current)</b> , and [Save] is clicked, a Change Request record with a status of <b>Pending</b> is created.
<b>Submitted</b>	When a <b>Pending</b> Change Request is submitted using the [Submit] button, its status is changed to <b>Submitted</b> .
<b>Approved</b>	If the Employee’s manager approves the Change Request, its status is changed to <b>Approved</b> , the Employee gets an email about the approval, and the approved Change Request will be available to the Employee in ESS.

## Rejected

If the Employee's manager rejects the Change Request, its status is changed to **Rejected**, the Employee gets an email about the rejections, and the rejected Change Request will be available to the Employee in ESS.

## Create Change Request – Change Profile Info

1. Select **Profile (Current)** from the drop-down list at the top-right of the screen, as shown above.
2. Enter the date for which the change is to be effective via the **Effective Date** field.
3. If required, enter a comment/note for your manager using the **Comment** field, next to the **Effective Date** field.
4. Modify the profile information as required.
5. Click the [**Save**] button along the top-right of the screen, which creates a Change Request record.

Once saved, what is displayed is the Change Request, and the fields that were changed are highlighted in green, and the Change Request is set to the Pending state. Also, the **Attachment** section becomes available at the bottom of the screen to attach attachments, using the [**Upload**] button:

The screenshot displays the 'Employee Self Service' interface. The main content area shows a 'Request for change of employee profile' form. The form includes the following sections:

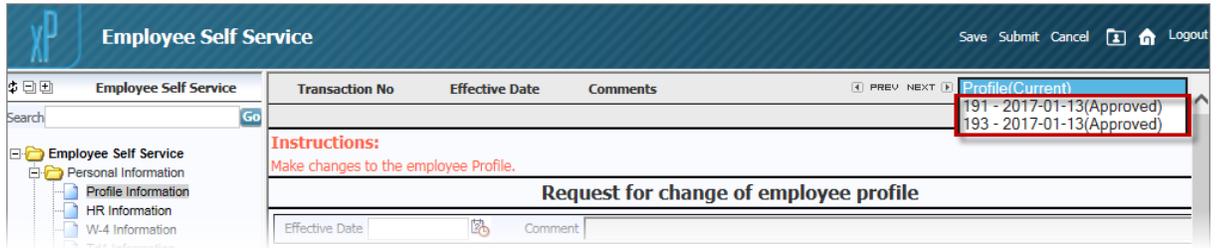
- Personal Information:** Fields for Last Name (Fern), First Name (Mike), Middle Name, Prefix Title, Suffix to Name, Date of Birth (01/01/1977), Marital Status (Single), and SSN (987654321).
- Mailing Address:** Fields for Address Line 1, Address Line 2, City (Chicago), State (Illinois), Country (United States of America), and ZIP (60631).
- Physical Address:** Fields for Address Line 1, Address Line 2, City, State, Country, and ZIP.
- Contact:** Fields for Home Phone, Home Fax, Cell Phone (443-453-9999), Work Phone, Work Fax, Work Cell Phone, Pager, E-Mail Address (mike.fernandes@cmic.ca), and Work Email Address.

At the bottom of the form, there is an 'Attachment' section with an 'Upload' button. The 'Cell Phone' field is highlighted in green, indicating a change. A 'saved Change Request' button is visible at the top right of the form area.

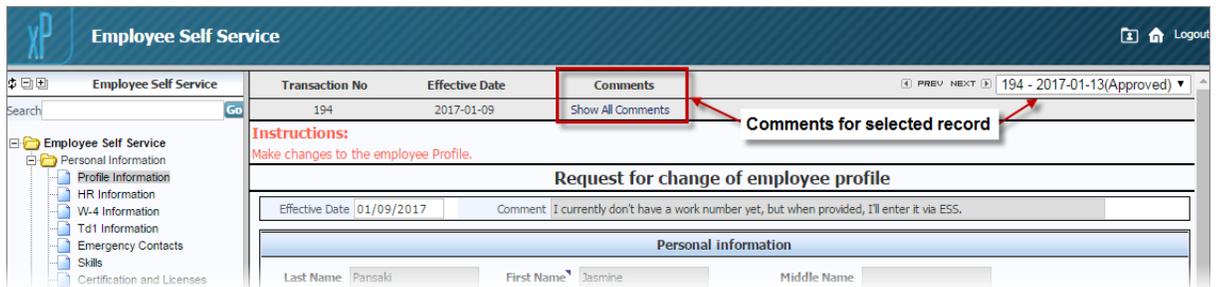
6. Once you are sure of the changes, click the [**Submit**] button along the top-right of the screen to set the Change Request to the Submitted state, and to have it sent to your manager.

Note, once a Change Request is submitted, you cannot make further changes to your profile information until the Change Request is either approved or rejected.

- After a Change Request is approved or rejected, you will be notified via an e-mail, and the approved/rejected Change Request becomes available via the drop-down list at the top-right of this screen, as shown below:



- If any comments were entered for the approved/rejected Change Request by your manager, the **Show All Comments** link will be visible, as shown below, when the approved/rejected record is selected via the drop-down list at the top-right of the screen:



## Change Request Approvals

For details, please refer to the *Profile Information – Change Request* section under the following sections:  
*Manager Self Service > Request Approval Screen.*

## HR Information Setup

### Create User-Extension Fields for HR Information Screen

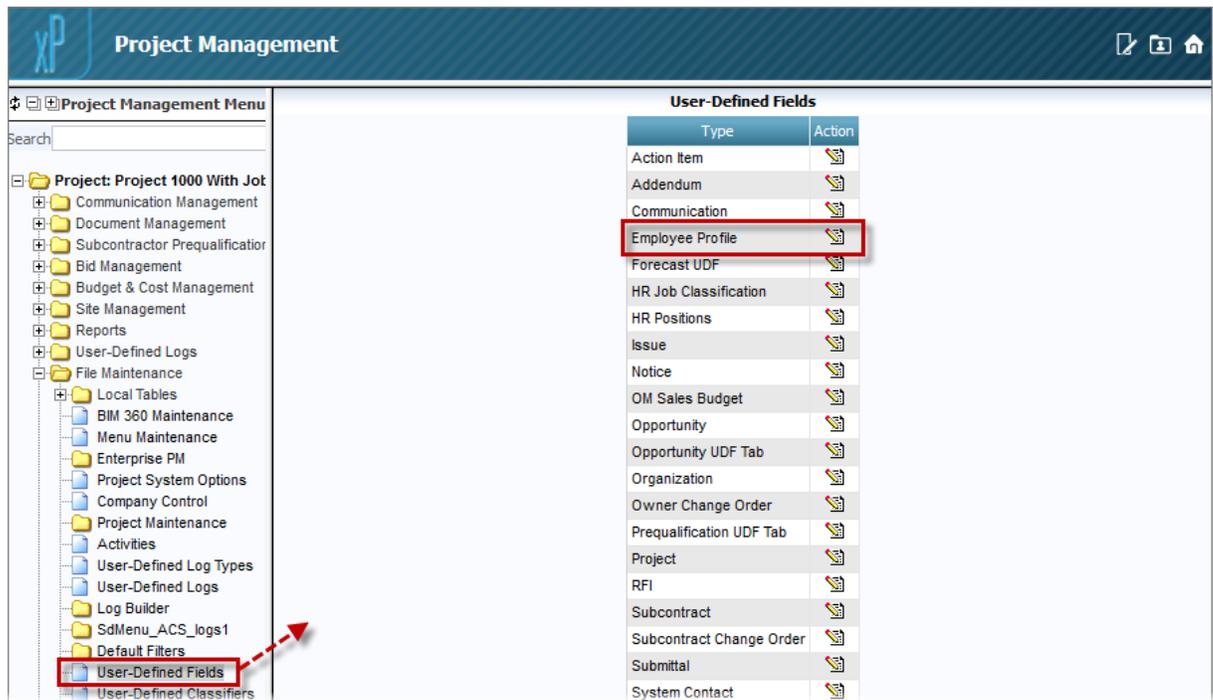
* System Defined	* Field	Field Description	* Rendering Type	* Data Type	Length	* Lookup Table	Lookup Validated	Required	Updateable	Updateable If Null	Case	Lower Bound Text	Upper Bound Text	Default Value
<input type="checkbox"/>	EMPROSHT	Preferred Shift: Morning, Afternoon	DEFAULT	Text	9	No LOV used	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mixed case			
<input type="checkbox"/>	OMSTBTEMP	Total Emergency Power (#)	DEFAULT	Numeric	10	No LOV used	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mixed case			
<input type="checkbox"/>	OMSTBTEMP2	Total Emergency Power (KW)	DEFAULT	Numeric	15	No LOV used	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mixed case			
<input type="checkbox"/>	TANXEMPT	Tax Exempt	CHECKBOX	Text	1	Use Valid Data as LOV	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Upper case			
<input checked="" type="checkbox"/>	APPEM_NUM	Applicant Number	DEFAULT	Text	16		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Upper case			
<input checked="" type="checkbox"/>	DPDEMPNO	Employee Number	DEFAULT	Text	16		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Upper case			
<input checked="" type="checkbox"/>	EMPHISTSEQ	History Sequence	DEFAULT	Numeric	38	No LOV used	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mixed case			
<input checked="" type="checkbox"/>	EMPNUM_ALL	Employee Number	DEFAULT	Text	16	All Employees	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Upper case			

Pgm: UEFIELD – UE Field Maintenance; standard Treeview path: *System > User Extensions > Field Maintenance*

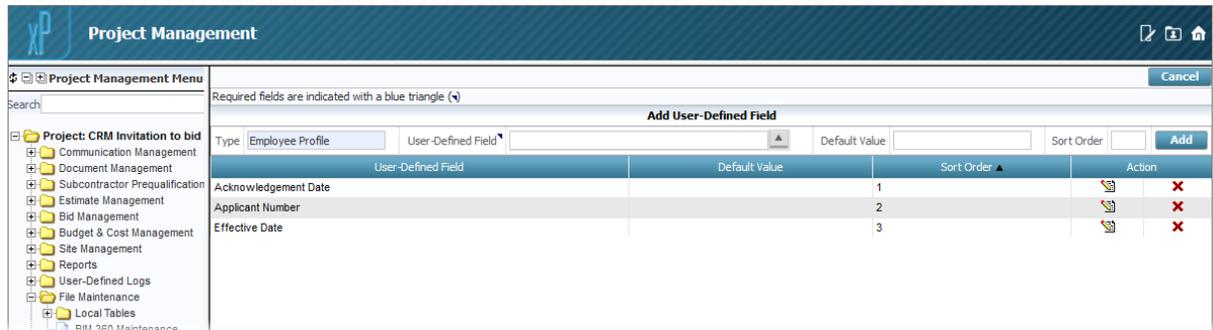
Use the Field Maintenance screen in the System module to create the User-Extension Fields to add to the HR Information screen.

For details about the Field Maintenance screen, please refer to the System Data user guide.

## Add Created User-Extension Fields to HR Information Screen



Using the User-Defined Fields screen of the Project Management module, click the **Employee Profile** option's Edit icon, framed above, to launch the following screen:



To add a User-Defined Field to the HR Information screen of the ESS module, click the **User-Defined Field's** arrow , and select the field via the popup.

If the field should have a default value, use the **Default Value** field to enter it, and use the **Sort Order** field to enter the order that the field is to appear in the HR Information screen. Click the **[Add]** button to finish.

The added fields are now available in the HR Information screen of the ESS module, and on the **User Defined Fields** tab of the Employee Profile.

# W-4 Information

Save Submit Delete Cancel

Review W4 for other years 2010

Transaction No	Date	Comments
491	2010-11-22	Updating W-4 2010

Effective Date: 10152010 Comment: Updating W-4 2010

Page 1, go to page 2

### Form W-4 (2010)

**Purpose.** Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Consider completing a new Form W-4 each year and when your personal or financial situation changes.

**Exemption from withholding.** If you are exempt, complete only lines 1, 2, 3, 4, and 7 and sign the form to validate it. Your exemption for 2010 expires February 16, 2011. See Pub. 505, Tax Withholding and Estimated Tax.

**Note.** You cannot claim exemption from withholding if (a) your income exceeds \$950 and includes more than \$300 of unearned income (for example, interest and dividends) and (b) another person can claim you as a dependent on their tax return.

**Basic instructions.** If you are not exempt, complete the **Personal Allowances Worksheet** below. The worksheets on page 2 further adjust your withholding allowances based on itemized deductions, certain credits, adjustments to income, or two-earner/multiple job situations.

Complete all worksheets that apply. However, you may claim fewer (or zero) allowances. For regular wages, withholding must be based on allowances you claimed and may not be a flat amount or percentage of wages.

**Head of household.** Generally, you may claim head of household filing status on your tax return only if you are unmarried and pay more than 50% of the costs of keeping up a home for yourself and your dependent(s) or other qualifying individuals. See Pub. 501, Exemptions, Standard Deduction, and Filing Information, for information.

**Tax credits.** You can take projected tax credits into account in figuring your allowable number of withholding allowances. Credits for child or dependent care expenses and the child tax credit may be claimed using the **Personal Allowances Worksheet** below. See Pub. 919, How Do I Adjust My Tax Withholding, for information on converting your other credits into withholding allowances.

**Nonwage income.** If you have a large amount of nonwage income, such as interest or dividends, consider making estimated tax payments using Form 1040-ES, Estimated Tax for Individuals. Otherwise, you may owe additional tax. If you have pension or annuity income, see Pub. 919 to find out if you should adjust your withholding on Form W-4 or W-4P.

**Two earners/Multiple jobs.** If you have a working spouse or more than one job, figure the total number of allowances you are entitled to claim on all jobs using worksheets from only one Form W-4. Your withholding usually will be most accurate when all allowances are claimed on the Form W-4 for the highest paying job and zero allowances are claimed on the others. See Pub. 919 for details.

**Nonresident alien.** If you are a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, before completing this Form.

**Check your withholding.** After your Form W-4 takes effect, use Pub. 919 to see how the amount you are having withheld compares to your projected total tax for 2010. See Pub. 919, especially if your earnings exceed \$130,000 (Single) or \$180,000 (Married).

### Personal Allowances Worksheet (Keep for your records.)

A Enter "1" for yourself if no one else can claim you as a dependent A

You are single and have only one job; or

B Enter "1" if you are married, have only one job, and your spouse does not work; or B

Your wages from a second job or your spouse's wages (or the total of both) are \$1,500 or less.

C Enter "1" for your spouse. But, you may choose to enter "-0-" if you are married and have either a working spouse or more than one job. (Entering "-0-" may help you avoid having too little tax withheld.) C

D Enter number of dependents (other than your spouse or yourself) you will claim on your tax return D

E Enter "1" if you will file as head of household on your tax return (see conditions under Head of household above) E

F Enter "1" if you have at least \$1,800 of child or dependent care expenses for which you plan to claim a credit (Note. Do not include child support payments. See Pub. 503, Child and Dependent Care Expenses, for details.) F

G Child Tax Credit (including additional child tax credit). See Pub. 972, Child Tax Credit, for more information. G

If your total income will be less than \$61,000 (\$90,000 if married), enter "2" for each eligible child; then less "1" if you have three or more eligible children.

If your total income will be between \$61,000 and \$84,000 (\$90,000 and \$119,000 if married), enter "1" for each eligible child plus "1" additional if you have six or more eligible children.

H Add lines A through G and enter total here. (Note. This may be different from the number of exemptions you claim on your tax return.) H

For accuracy, complete all worksheets that apply. If you plan to itemize or claim adjustments to income and want to reduce your withholding, see the Deductions and Adjustments Worksheet on page 2. If you have more than one job or are married and you and your spouse both work and the combined earnings from all jobs exceed \$18,000 (\$32,000 if married) see the Two-Earners/Multiple Jobs Worksheet on page 2 to avoid having too little tax withheld. If neither of the above situations applies, stop here and enter the number from line H on line 5 of Form W-4 below.

Form <b>W-4</b> Department of the Treasury Internal Revenue Service	<b>Employee's Withholding Allowance Certificate</b> 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.	OMB No. 1545-0074 <b>2010</b>
1 Type or print your first name and middle initial Alfred	Last Name Jonas	2 Your social security number 315695012

Employees can submit their W-4 changes for approval in the W-4 Information screen. Changes may be made in the Original record if it is available for editing. It will be editable if there are no W-4 requests to approve for the employee.

Changes should be made in the Original W-4 and saved. When the change is saved, a new record with the transaction number and current date is created. The Original record will not be editable at this time. Line 3 - Federal Filing Status (Single/Married) must be specified. Line 5 - "Total number of allowances you are claiming" and line 6 - "Additional amount, if any, you want withheld from each paycheck" may also be entered. Once approved, the Employee Profile will be updated with lines 3, 5 and 6, an employment history record will be created and the Original W-4 will be editable again.

Upon approval, a new employment history record is created in Payroll. The Federal Filing Status on the Tax tab of the Employee Profile will be updated with the value in line 3 of the W-4. The Primary Exemptions field on the Tax tab of the Employee Profile will be updated with line 5 of the W-4. Federal Withholding tax will be inserted in the Overrides pop-up on the Tax tab of the Employee Profile with the value entered in line 6 of the W-4. The Tax Amount will be the value from line 6 and the Amount Type will be "00" (Additional Tax).

To delete a saved W-4, press the **[Delete]** button. The Original W-4 will become available for editing and submission at this time.

To submit a modified W-4 for approval, press the **[Submit]** button. Once submitted, the W-4 will appear in the Personal Information Change Request Approval screen to be approved.

# TD1 Information

[Update My Profile](#) | [Home](#) | [Logout](#)  
[Save](#) | [Submit](#) | [Delete](#) | [Cancel](#)

ice

Transaction No	Date	Comments	Original
Effective Date: 01/11/13      Comment: TD1 John Smith			
Page 1 of page 2 TD1			
<b>2012 PERSONAL TAX CREDITS RETURN</b>			
Your employer or payer will use this form to determine the amount of your tax deductions. Read the back before completing this form. Complete this form based on the best estimate of your circumstances.			
Last Name: Watson Address including postal code:		First name and initial(s): Suzette A. Day of Birth (YYYYMMDD): 1975-04-30 For non-residents only: Country of permanent residence: US	Employee Number: SWC-WK-SAL3 Social Insurance Number: 202303404
<b>1. Basic personal amount</b> – Every resident of Canada can claim this amount. If you will have more than one employer or payer at the same time in 2012, see "More than one employer or payer at the same time" on the next page. If you are a non-resident, see "Non-residents" on the next page.			10,822
<b>2. Child amount</b> – Either parent (but not both), may claim \$2,191 for each child born in 1995 or later, that resides with both parents throughout the year. If the child is infirm, add \$2,000 to the claim for that child. Any unused portion can be transferred to that parent's spouse or common-law partner. If the child does not reside with both parents throughout the year, the parent who is entitled to claim the amount for an eligible dependent on the form may also claim the child amount for that same child.			1
<b>3. Age amount</b> – If you will be 65 or older on December 31, 2012, and your net income for the year from all sources will be \$33,954 or less, enter \$6,720. If your net income for the year will be between \$33,954 and \$78,664 and you want to calculate a partial claim, get the TD1-WIS, Worksheet for the 2012 Personal Tax Credits Return, and complete the appropriate section.			1
<b>4. Pension income amount</b> – If you will receive regular pension payments from a pension plan or fund (excluding Canada Pension Plan, Quebec Pension Plan, Old Age Security, or Guaranteed Income Supplement payments), enter \$2,000 or your estimated annual pension income, whichever is less.			1
<b>5. Tuition, education and textbook amounts (full time and part time)</b> – If you are a student enrolled at a university, or college, or an educational institution certified by Human Resources and Skills Development Canada, and you will pay more than \$100 per institution in tuition fees, complete this section. If you are enrolled full time, or if you have a mental or physical disability and are enrolled part time, enter the total of the tuition fees you will pay, plus \$400 for each month that you will be enrolled, plus \$65 per month for textbooks. If you are enrolled part time and do not have a mental or physical disability, enter the total of the tuition fees you will pay, plus \$100 for each month that you will be enrolled part time, plus \$20 per month for textbooks.			1
<b>6. Disability amount</b> – If you will claim the disability amount on your income tax return by using Form T2201, Disability Tax Credit Certificate, enter \$7,546.			1
<b>7. Spouse or common-law partner amount</b> – If you are supporting your spouse or common-law partner who lives with you, and whose net income for the year will be less than \$10,822 (\$12,822 if he or she is infirm), enter the difference between this amount and his or her estimated net income for the year. If your spouse's or common-law partner's net income for the year will be \$10,822 or more (\$12,822 or more if he or she is infirm), you cannot claim this amount.			1
<b>8. Amount for an eligible dependent</b> – If you do not have a spouse or common-law partner and you support a dependent relative who lives with you, and whose net income for the year will be less than \$10,822 (\$12,822 if he or she is infirm and you did not claim the child amount for this dependent), enter the difference between this amount and his or her estimated net income. If your eligible dependent's net income for the year will be \$10,822 or more (\$12,822 or more if he or she is infirm), you cannot claim this amount.			1
<b>9. Caregiver amount</b> – If you are taking care of a dependant who lives with you, whose net income for the year will be \$15,033 or less, and who is either your or your spouse's or common-law partner's: <ul style="list-style-type: none"> <li>- parent or grandparent (aged 65 or older), enter \$6,402 (\$6,402 if he or she is infirm); or</li> <li>- relative (aged 18 or older) who is dependent on you because of an infirmity, enter \$6,402.</li> </ul> If the dependant's net income for the year will be between \$15,033 and \$18,435 (\$15,033 and \$21,435 if he or she is infirm) and you want to calculate a partial claim, get the TD1-WIS and complete the appropriate section.			1
<b>10. Amount for infirm dependants age 18 or older</b> – If you support an infirm dependant age 18 or older who is your or your spouse's or common-law partner's relative, who lives in Canada, and whose net income for the year will be \$6,402 or less, enter \$6,402. You cannot claim an amount for a dependant you claimed on line 9. If the dependant's net income for the year will be between \$6,402 and \$12,822 and you want to calculate a partial claim, get the TD1-WIS, and complete the appropriate section.			1
<b>11. Amounts transferred from your spouse or common-law partner</b> – If your spouse or common-law partner will not use all of his or her age amount, pension income amount, tuition, education and textbook amounts, disability amount or child amount on his or her income tax return, enter the unused amount.			1
<b>12. Amounts transferred from a dependant</b> – If your dependant will not use all of his or her disability amount on his or her income tax return, enter the unused amount. If your or your spouse's or common-law partner's dependent child or grandchild will not use all of his or her tuition, education, and textbook amounts on his or her income tax return, enter the unused amount.			1
<b>13. TOTAL CLAIM AMOUNT</b> – Add lines 1 through line 12. Your employer or payer will use this amount to determine the amount of your tax deductions.			10,822

Employees can submit their TD1 changes for approval in the TD1 Information screen. Changes may be made in the Original record if it is available for editing. It will be editable if there are no TD1 requests to approve for the employee.

Changes should be made in the Original TD1 and saved. Completing the form allows tax deductions to be reduced if the employee is eligible for tax credits other than the basic personal exemption. When the change is saved, a new record with the transaction number and current date is created. The Original record will not be editable at this time. Once approved, the Employee Profile will be updated, an employment history record will be created and the Original TD1 will be editable again.

Upon approval, a new employment history record is created in Payroll. To delete a saved TD1, press the **[Delete]** button. The Original TD1 will become available for editing and submission at this time.

To submit a modified TD1 for approval, press the **[Submit]** button. Once submitted, the TD1 will appear in the Personal Information Change Request Approval screen to be approved.

# Emergency Contact

The screenshot shows the 'Employee Self Service' interface for managing emergency contacts. At the top, there are navigation buttons: 'Save', 'Submit', 'Cancel', a printer icon, a home icon, and 'Logout'. Below this is a header bar with 'Transaction No', 'Date', and 'Comments' fields, and a 'Current' dropdown menu. The main content area is titled 'Instructions: How to make a change request for emergency contacts'. The form itself includes an 'Effective Date' field (020217) with a calendar icon and a 'Comment' field. The contact details are organized into several sections: 'Personal Information' (First Name: Mary, Last Name: Ross, Middle Name, Priority: High, Sex: Female), 'Contact Information' (Phone: 454-864-8877, Alter Phone, Cell Phone, PAGER, Fax, E-Mail Address), and 'Address Information' (Address Line 1: 565 Sunflower Lane, Address Line 2, Address Line 3, ZIP: 66575, State, Country: United States of America). A 'Delete this record' checkbox is located at the bottom right of the form, next to a blue plus icon.

Emergency Contacts may be updated in this screen.

To add a new Emergency Contact, press the blue Add icon **+**, enter an **Effective Date** and contact details. When done, press the **[Save]** button. A Pending record will be created to be submitted.

To remove an Emergency Contact, check the **Delete this Record** checkbox. When done, press the **[Save]** button.

To submit the Emergency Contact request for approval, press the **[Submit]** button. The Emergency Contact submitted will be available in the Personal Information Change Request Approval screen to be approved.

# Skills

**Employee Self Service** Save Submit Delete Cancel Original

Transaction No Date Comments PREVIOUS NEXT Original

Effective Date Comment Deleted Changed Added

**Instructions:**  
How to make a change request for skills

**Request for change of skills**

Skill Code	Skill Description	Experience (Months)	
<b>Skills on file</b>			<input checked="" type="checkbox"/> Select
<b>Skills to be added:</b>			<input type="checkbox"/> Select
<b>Skills to be deleted:</b>			<input type="checkbox"/> Select
<b>Other skills in system</b>			<input type="checkbox"/> Select
FORKLIFT	Forklift		<input type="checkbox"/>
PLUMBING	Plumbing		<input type="checkbox"/>
ROOFING	Roofing		<input type="checkbox"/>
GROUNDS	Groundskeeper		<input type="checkbox"/>
ZZ-CARP	Carpenter		<input type="checkbox"/>
ZZ-ELE	Electrical Apprentice		<input type="checkbox"/>
ZZ-CUST	Customer Service		<input type="checkbox"/>
APP-WIR	Wiring Apprentice		<input type="checkbox"/>
RV-OIL	RV-OIL Mechanic		<input type="checkbox"/>
ROOFER	Roofer		<input type="checkbox"/>
AUTOCAD	Auto Cad Designer Engineers		<input type="checkbox"/>
DRYWALL	Drywall, Mudding and Plasterin		<input type="checkbox"/>

Employees' skills may be updated and submitted for approval. The **Skills on file** section will display skills that are currently set up on the Employee Profile.

To create a request, enter the **Effective Date**. A comment is optional. To add skill, search for it, enter the number of months of experience, and check the **Select** checkbox beside the skill.

Skills that are not in the system may be manually entered in the section below the **Other skills in system** section.

To remove skills, uncheck the **Select** checkbox beside the skills.

The skills to be added will be displayed in the **Skills to be added** section. A new record with the transaction number and current date will be created, and the Original record will not be editable. The Skills to be removed will be displayed in the **Skills to be deleted** section.

To delete a saved request, press the **[Delete]** button. To submit the request, press the **[Submit]** button, and use the **[Save]** button to save when finished.

If the **Skill Auto Approve** checkbox is checked in the Self Service Control Setup screen, the request will be automatically approved, and will be displayed in the Auto Approved Request List screen with a Submit Status of "A". If the checkbox is not checked, the request will not be automatically approved, and it will be displayed in the Personal Information Change Request Approval screen to be approved. It will also be displayed in the Auto Approved Request List screen with a Submit Status of "S".

Once approved, the skills added will be displayed in the **Skills on file** section, and the Original record will be editable again. The Original record will be updated with the changes that were approved, and the Skills will be updated in the Employee Profile also. Press the **[Skills]** button on the Employee Profile to view the updated skills.

If the Skills request was rejected, the record with the same transaction number will be editable for further changes.

# Certifications and Licenses

**Employee Self Service** Save Submit Delete Cancel Logout

Transaction No      Date      Comments      PREV NEXT Original

Effective Date  Comment  Deleted Changed Added

**Instructions:**  
How to make a change request for certificates/licenses

**Request for change of certificates/licenses**

Code	Description	State	Effective Date	
<b>Certificates/Licenses on file</b>				<input type="checkbox"/> Select
<b>Certificates/Licenses to be added:</b>				<input type="checkbox"/> Select
<b>Certificates/Licenses to be deleted:</b>				<input type="checkbox"/> Select
<b>Other certificates/licenses in system</b>				<input type="checkbox"/> Select
PMP	Project Management Certificate	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
FORKLIFT	Basic Forklift	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
ZZ-SAFETY1	Basic Safety Training	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
SMI002	Smith Certification - 4 YR	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
PENG	Professional Engineering	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
DRUG	Drug Testing	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
EFA	Essential Function Analysis	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
SAFETY	Safety Certificate	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

If certificates/licenses are not in the system, please specify here:

Employees' certifications and licenses may be updated and submitted for approval. The **Certificates/Licenses on file** section will display certificates and licenses that are currently set up on the Employee Profile.

To create a request, enter the **Effective Date**. A comment is optional. To add a certificate/license, find it, enter the **State** and its **Effective Date**, and check its corresponding **Select**.

Certificates/Licenses that are not in the system may be manually added by checking the **Other Certificates/Licenses in system** checkbox, then entering their details in the textbox with the caption, **"If certificates/licenses are not in the system, please specify here"**.

To remove a certificate/license, uncheck its corresponding **Select** checkbox. When done, press the **[Save]** button.

The certificates/licenses to be added will be displayed in the **Certificates/Licenses to be added** section. A new record with the transaction number and current date will be created, and the Original record will not be available for editing. The certifications/licenses to be deleted will be displayed in the **Certificates/Licenses to be deleted** section.

To delete a saved request, press the **[Delete]** button along the top of the screen.

To submit the request, press the **[Submit]** button. If the **Certificate/License Auto Approve** checkbox is checked in the Self Service Control Setup screen, the certificate/license request will be automatically approved, and will be displayed in the Auto Approved Request List screen with a Submit Status of "A". If the checkbox is not checked, the certificate/license request will not be automatically approved, and it will be displayed in the Personal Information Change Request Approval screen to be approved. It will also be displayed in the Auto Approved Request List screen with a Submit Status of "S".

XP
Employee Self Service
Back Logout

Transaction No	Date	Comments	PREV NEXT 214-2017-02-06
214	2017-02-06		
Effective Date	2017-02-06	Comment	Deleted Changed Added

**Request for change of certificates/licenses**

**Certificates/Licenses on file**

Code	Description	State	Effective Date
<b>Certificates/Licenses to be added:</b>			
PMP	Project Management Certificate	American Samoa	2016-02-02
<b>Certificates/Licenses to be deleted:</b>			
<b>Other certificates/licenses in system</b>			
FORKLIFT	Basic Forklift		
ZZ-SAFETY1	Basic Safety Training		
SMI002	Smith Certification - 4 YR		
PENG	Professional Engineering		
DRUG	Drug Testing		
EFA	Esseintial Function Analysis		
SAFETY	Safety Certificate		

**If certificates/licenses are not in the system, please specify here:**

welding

Attachment

File Name	Upload Date	Note
No Records Found		

Once approved, the certificates/licenses added will be displayed in the **Certificates/Licenses on file** section, and the Original record will be editable again. The Original record will be updated with the changes that were approved. The Certificates/Licenses will be updated in the Employee Profile, and to view them, press the **[License/Cert]** button on the Employee Profile for the updated certificates/licenses.

If the Licenses/Certificates request was rejected, the record with the same transaction number will be editable for further changes.

# Degrees

Employee Self Service
Save Submit Delete Cancel Logout

Transaction No	Date	Comments	PREV NEXT Original
Effective Date	<input type="text"/>	Comment <input type="text"/>	Deleted   Changed   Added

**Instructions:**  
How to make a change request to change education information.

**Request for change of education information**

Code	Description	Course	Field of Study	Institution	Degree Years	Year Completed	
<b>Education information on file</b>							<input type="checkbox"/> Select
<b>Education type to be added:</b>							<input type="checkbox"/> Select
<b>Education type to be deleted:</b>							<input type="checkbox"/> Select
<b>Other education types in system</b>							<input type="checkbox"/> Select
B.ARCH.	Bachelor of Architecture	--Other--		American Payroll Association			<input type="checkbox"/>
ELEC.TRDE	Electrical Trades	--Other--		American Payroll Association			<input type="checkbox"/>
ENGINEER M	Master of Engineering	--Other--		American Payroll Association			<input type="checkbox"/>
GRADE	Grade School	--Other--		American Payroll Association			<input type="checkbox"/>
M.ARCH.	Master of Architecture	--Other--		American Payroll Association			<input type="checkbox"/>
N/A	Not Applicable	--Other--		American Payroll Association			<input type="checkbox"/>
SAFECERT	Safety Certificate	--Other--		American Payroll Association			<input type="checkbox"/>
TECHCERT	Technical Certification	--Other--		American Payroll Association			<input type="checkbox"/>

If education type is not in the system, please specify here:

This screen is used to view and update an Employee’s education information.

The **Education information on file** section displays degrees/diplomas that are currently set up in HR via the Degrees Maintenance screen (standard Treeview path: *HCM > File Maintenance > Degrees*).

To create a request, enter the **Effective Date**. A comment is optional. To add a degree/diploma, search for it, check its corresponding **Select** checkbox, select the **Course**, enter the **Field of Study**, select the **Institution**, and fill out the **Degree Years** and **Year Completed** fields.

Degrees that are not in the system may be manually added by checking the **Other education types in system** checkbox, then entering their details in the textbox with the caption, “**If education type is not in the system, please specify here**”.

The Degrees to be added will be displayed in the **Education type to be added** section. A new record with the transaction number and current date will be created, and the Original record will not be available for editing.

The screenshot shows the 'Employee Self Service' interface. At the top, there is a navigation bar with 'Employee Self Service' and 'Logout'. Below this is a header section with 'Transaction No' (216), 'Date' (2017-02-06), and 'Comments'. A sub-header shows 'Effective Date' (2015-10-05) and 'Comment'. There are status indicators for 'Deleted', 'Changed', and 'Added'. The main section is titled 'Request for change of education information' and contains a table for 'Education information on file'. The table has columns for Code, Description, Course, Field of Study, Institution, Degree Years, and Year Completed. Under 'Education type to be added', there is one entry: B.ARCH (Bachelor of Architecture), Bachelor Degree, Engineering & Technology, American Payroll Association, 4, 2006, with a checked checkbox. Under 'Education type to be deleted', there are several entries with dropdown menus for 'Course' and 'Institution', all set to 'American Payroll Association'. Below the table is a section for 'Other education types in system' and a text area for 'If education type is not in the system, please specify here:'. At the bottom, there is an 'Attachment' table with columns for File Name, Upload Date, and Note, showing 'No Records Found'.

The Degrees to be deleted will be displayed in the **Education type to be deleted** section.

To delete a saved request, press the **[Delete]** button.

To submit the request, press the **[Submit]** button.

If the **Education Auto Approve** checkbox is checked in the Self Service Control Setup screen, the Change Request will be automatically approved, and it will be displayed in the Auto Approved Request List screen with a Submit Status of "A". If the checkbox is not checked, the Degrees request will not be automatically approved, and it will be displayed in the Personal Information Change Request Approval screen to be approved. It will also be displayed in the Auto Approved Request List screen with a Submit Status of "S".

Once approved, the degrees added will be displayed in the **Education information on file** section, and the Original record will be editable again. The Original record will be updated with the changes that were approved.

If the Change Request was rejected, the record with the same transaction number will be editable for further changes.

# Memberships

Employee Self Service
Save Submit Delete Cancel Logout

Transaction No	Date	Comments	(1) PREV NEXT (1) Original ▾
Effective Date: <input type="text"/>	Comment: <input type="text"/>	Deleted   Changed   Added	
<b>Instructions:</b> How to make a change request for memberships			
<b>Request for change of memberships</b>			
Code	Description	Membership Type	
Memberships on file			<input type="checkbox"/> Select
Memberships to be added:			<input type="checkbox"/> Select
Memberships to be deleted:			<input type="checkbox"/> Select
Other memberships in system			<input type="checkbox"/> Select
2107-CPA	2107-CPA	--Select Membership Type-- ▾	<input type="checkbox"/>
ALT-UNION	ALT Union	--Select Membership Type-- ▾	<input type="checkbox"/>
AMINARCHNY	American Institute of Archit.	--Select Membership Type-- ▾	<input type="checkbox"/>
APA-01	American Payroll Association	--Select Membership Type-- ▾	<input type="checkbox"/>
APEO	Assoc. of Prof. Eng. Ontario	--Select Membership Type-- ▾	<input type="checkbox"/>
CPA	Canadian Payroll Association	--Select Membership Type-- ▾	<input type="checkbox"/>
CPA05	Canadian Payroll Association	--Select Membership Type-- ▾	<input type="checkbox"/>
ASDFSADF	fsdfasdfsdf	--Select Membership Type-- ▾	<input type="checkbox"/>
21	IBEW Local 21	--Select Membership Type-- ▾	<input type="checkbox"/>
08072014.C	Org Detail	--Select Membership Type-- ▾	<input type="checkbox"/>
PENGASSO	Professional Engineers Assoc	--Select Membership Type-- ▾	<input type="checkbox"/>
SHRM	Society of Human Resources	--Select Membership Type-- ▾	<input type="checkbox"/>
TEST1234	Validation	--Select Membership Type-- ▾	<input type="checkbox"/>
09072014	Validation against Memberships	--Select Membership Type-- ▾	<input type="checkbox"/>
If membership types are not in the system, please specify here:			

This screen is used to view and update an Employee's Membership information.

The **Memberships on file** section displays memberships that are currently set up in HR.

To create a request, enter the **Effective Date**. A comment is optional. To add a membership, find it, select its **Membership Type** and check its corresponding **Select** checkbox.

Memberships that are not in the system may be manually added by checking the **Other memberships in system** checkbox, then entering their details in the textbox with the caption, "**If membership types are not in the system, please specify here**". When done, press the **[Save]** button.

**Employee Self Service** Save Submit Delete Cancel Logout

Transaction No	Date	Comments	PREV	NEXT	218-2017-02-06
218	2017-02-06				

Effective Date: 060216 Comment:

Deleted | Changed | Added

**Instructions:**  
How to make a change request for memberships

**Request for change of memberships**

Code	Description	Membership Type	
<b>Memberships on file</b>			
			<input type="checkbox"/> Select
<b>Memberships to be added:</b>			
			<input type="checkbox"/> Select
SHRM	Society of Human Resources	Full Member	<input checked="" type="checkbox"/>
			<input type="checkbox"/> Select
<b>Memberships to be deleted:</b>			
			<input type="checkbox"/> Select
<b>Other memberships in system</b>			
			<input type="checkbox"/> Select
2107-CPA	2107-CPA	--Select Membership Type--	<input type="checkbox"/>
ALT-UNION	ALT Union	--Select Membership Type--	<input type="checkbox"/>
AMINARCHNY	American Institute of Archit.	--Select Membership Type--	<input type="checkbox"/>
APA-01	American Payroll Association	--Select Membership Type--	<input type="checkbox"/>
APEO	Assoc. of Prof. Eng. Ontario	--Select Membership Type--	<input type="checkbox"/>
CPA	Canadian Payroll Association	--Select Membership Type--	<input type="checkbox"/>
CPA05	Canadian Payroll Association	--Select Membership Type--	<input type="checkbox"/>
ASDFSADF	fsdfasdfsdf	--Select Membership Type--	<input type="checkbox"/>
21	IBEW Local 21	--Select Membership Type--	<input type="checkbox"/>
08072014.C	Org.Detail	--Select Membership Type--	<input type="checkbox"/>
PENGASSO	Professional Engineers Assoc	--Select Membership Type--	<input type="checkbox"/>
TEST1234	Validation	--Select Membership Type--	<input type="checkbox"/>
09072014	Validation against Memberships	--Select Membership Type--	<input type="checkbox"/>

If membership types are not in the system, please specify here:

Attachment			
File Name	Upload Date	Note	Action
No Records Found			

The Memberships to be added will be displayed in the **Memberships to be added** section. A new record with the transaction number and current date will be created, and the Original record will not be available for editing. The memberships to be deleted will be displayed in the **Memberships to be deleted** section.

To delete a saved request, press the **[Delete]** button.

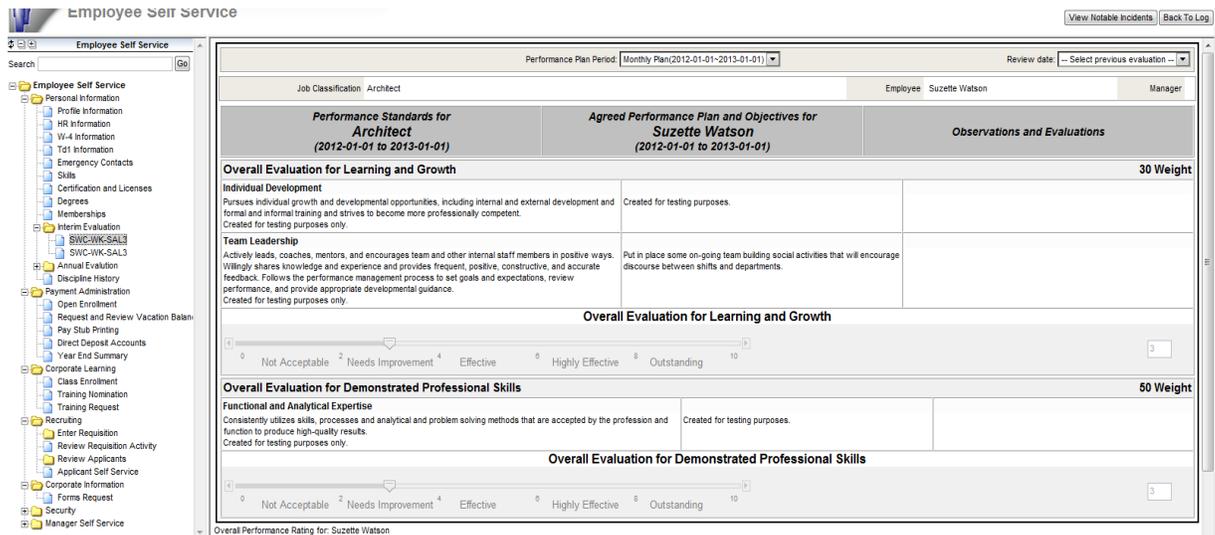
To submit the request, press the **[Submit]** button.

If the **Membership Auto Approve** checkbox is checked in the Self Service Control Setup screen, the Memberships request will automatically be approved, and it will be displayed in the Auto Approved Request List screen with a Submit Status of "A". If the checkbox is not checked, the Memberships request will not be automatically approved, and will be displayed in the Personal Information Change Request Approval screen to be approved. It will also be displayed in the Auto Approved Request List screen with a Submit Status of "S".

Once approved, the Memberships added will be displayed in the **Memberships on file** section, and the Original record will be editable again. The Original record will be updated with the changes that were approved. The memberships will be updated in HR in the Personnel -> Memberships screen also.

If the Change Request was rejected, the record with the same transaction number will be editable for further changes.

# Interim Evaluation



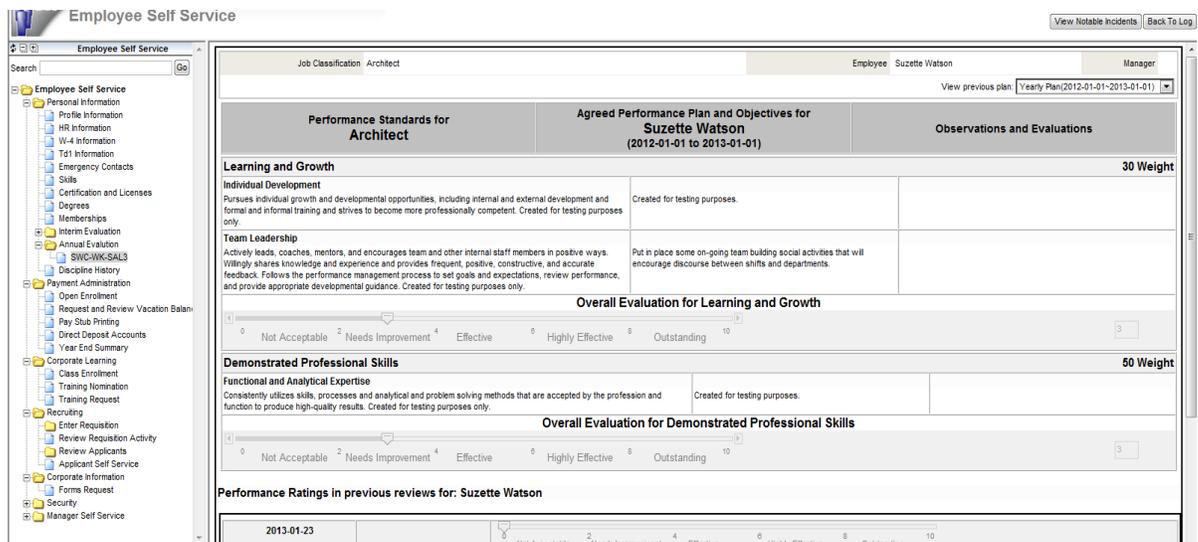
This screen is used by employees to review their Interim evaluations by their managers.

The system will default to the latest created review, and previous reviews are also available.

Interim Evaluations allow managers to enter observations/notes against each section of an employee's performance plan, and to rate the performance in each category. For managers, Interim Evaluations are created in the HCM module, using the Interim Evaluations screen (standard Treeview path: *HCM > Performance Management > Interim Evaluations*). For details, please refer to the HCM user guide.

There is an option to open [View Notable Incidents] for employees review. For details, please refer to the HCM user guide.

# Annual Evaluation



This screen is used by employees to review their Annual Evaluations, and to review Notable Incidents.

This screen defaults to the latest created review, and previous ones can also be viewed through this screen.

Annual evaluations have been designed to be pre-populated with all the items from the interim evaluations that were flagged to be carried forward to the Final Evaluation. Annual Evaluations allow the manager to enter additional observations/notes against each section of the employee's performance plan, and to rate the performance in each category, between 'Outstanding' and 'Unacceptable'. Additionally, revision to the values carried forward from the Interim Evaluations may also be made.

For further details about Annual Evaluations, please refer to the HCM user guide.

## Discipline History

Transaction No	Performed Date	Type	Action	Handled By	Effective Date	Status
12	06Dec2010	Written	Written	SUS-EMR-2	06Dec2010	Submitted
13	06Dec2010	Verbal	Sent Home Without Pay	SM-EMP01	07Dec2010	Submitted
7		Verbal	Written		10Nov2010	Submitted
8	19Nov2010	Written	Sent Home Without Pay		19Nov2010	Submitted
14	04Dec2010	Verbal	Sent Home Without Pay	SM-EMP01	03Dec2010	Employee Signed

**Discipline Details**

Discipline Type:  Save

Action Taken:

Effective Date:  Close Date:

Problem Description:

Handled By:

Performed Date:

Resolution:

Employee Comment:

By signing this notice, I am acknowledging that I have been counseled about my inappropriate conduct and informed of consequences if improvements are not made.

This screen is used by employees to view current and past Disciplinary notices. The Discipline History is the JSP version of Discipline Tracking in HR Forms.

Managers create Disciplinary records via the Employee Discipline History screen of the HCM module (standard Treeview path: *HCM > Performance Management > Employee Discipline History*). These records are created in draft form, which are not available to anyone. Once the manager submits the record, the employee will be able to see it in the Discipline History screen of the Employee Self Service system. The manager can also send a predefined email to the employee that will inform him/her of the Disciplinary Action, and it will contain the URL to the ESS system.

From: stephanie.bromfield@cmic.ca  
 To: Stephanie Bromfield  
 Cc:  
 Subject: Disciplinary Action Notice

A disciplinary action has been taken, for detail information please click the following link to log on to employee self service.  
<http://testv10.cmic.ca:7785/SdMenu/?appCode=SSE>

The employee will be able to open the item in ESS, and add their own comments, as well as add their electronic signature to indicate that they have seen the document.

# Payment Administration

## Open Enrollment

Open Enrollment allows employees to make benefit/deduction elections from the benefit package offered by their company. The plans and options that they are eligible for and elected in are displayed for the employee to make their selections. During a fixed period range, Open Enrollment allows the employee to elect the benefit/deduction plans and options in which they would like to participate. Once submitted, the requests are made available in the Open Enrollment Approval screen for approval and the Payroll/HR modules are updated accordingly. Qualifying Events and Dependent requests also require approval.

## Welcome to CMIC Open Enrollment

Open Enrollment is **08/01/2010** through **12/31/2010**.

During this period, you have the opportunity to make your **2011** benefit elections.

Ed Knight Enrollment					
Status	Start Date	End Date	Days Left	Description	Action
Pending	2010-08-01	2010-12-31	57	General	Enroll Now
Enrollment Links					
Add Dependent					
Qualifying Event					
Report/Review Qualifying Event					
Dependent Enrollment					
Current Cost					
Employee Amount	<b>\$40.38</b>	Employer Amount	<b>\$80.76</b>	Total Cost	<b>\$40.38</b>

The employee can enroll in different benefit plans/options, or make changes to existing plans/options after clicking on the **Enroll Now** link to enroll. The link is displayed only one period at a time. The Period Start and End Date for “General” periods (not Qualifying Events) are determined by the period dates set up in the Open Enrollment Period Setup screen.

## Enrolling

Benefits Enrollment									Notes	Current Comparison	Submit Changes
Enrollment Status	Benefit Description	Current Plan	Option	Effective Date	Employee Amount	Employer Amount	Total Amount				
Elected Last Year	401K	Employer Match	SINGLE	01/01/2008	46.15	46.15	92.3	Change			
Elected Last Year	Living Expenses	Single	T-FREE	12/31/2008	0	76.92	76.92	Change			
Not Enrolled	401K	No Coverage		01/01/2008				Change			
Not Enrolled	Dental	No Coverage		04/01/2008				Change			
Not Enrolled	Garnishment	No Coverage		01/08/2008				Change			
Not Enrolled	Living Expenses	No Coverage		12/31/2008				Change			
Not Enrolled	Vehicle Allowance	No Coverage		01/01/2008				Change			

The **Allow Open Enrollment** checkbox in the Master Benefit/Deduction screen in HR determines which benefits/deductions are visible in Open Enrollment.

Eligible and elected benefits/deductions are listed here. The Employee Amount is the actual amount the employee pays on deductions. The Employer Amount is the amount the employer pays, i.e. the employer contribution of a deduction, a cash or non-cash benefit.

To change the election press the **[Change]** button beside the benefit/deduction and select the new coverage.

Benefit Plan Options For: Living Expenses					
Plan Description	Plan Option	Employee Amount	Employer Amount	Total Amount	Select
Single	T-FREE	0	76.92	76.92	<input type="radio"/>
Family	T-FREE	0	92.31	92.31	<input checked="" type="radio"/>
No Coverage		0	0	0	<input type="radio"/>

Save Cancel

The plans/options for the particular benefit are displayed in a pop-up screen for selection. When done, press the **[Save]** button.

Notes may be added to the Benefit Enrollment record.

Add Save Close

Date	Author	Note
2010-09-10	Hazel Patton	Changes to benefit elections

Edit

To enter or view notes, press the **[Notes]** button. To add a note, press the **[Add]** button, and enter the note. When done, press **[Save]**. To edit the note, click on the **Edit** link.

To compare the current enrollment with the new request press the **[Current Comparison]** button.

Submit Close

Coverage Comparision

Current Enrollment							Requested Changes						
Benefit Description	Enrolled Plan	Option	Effective Date	Employee Amount	Employer Amount	Total Amount	Benefit Description	Enrolled Plan	Option	Effective Date	Employee Amount	Employer Amount	Total Amount
Living Expenses	Single	T-FREE	12/31/2008	0	76.92	76.92	Living Expenses	Family	T-FREE	12/31/2008	0	92.31	92.31

The current enrollment and the requested changes are displayed for the employee to review.

To submit the changes press the **[Submit]** button. To submit the changes without reviewing the comparison, press the **[Submit Changes]** button.

## Confirmation Statement | Open Enrollment

Event Date: 08/01/2010 | Enrollment Deadline: 09/14/2010 | Days Left: 44

Confirmation Number: 4843  
Confirmed on: 09/10/2010 00:09 AM EDT

This screen confirms the coverage you will receive as a result of this event. If you do not change your elections, this coverage will remain in effect. You may refer to the Confirmation Number for future inquiries, if necessary.

Please print and retain this information for your records.

**Reminder!** If you haven't yet made new benefit elections as a result of this event (or if you want to change the elections you just make), you have until the enrollment deadline to do so. After the enrollment deadline, you will not be able to make changes until the next Open Enrollment period, unless you experience another Qualified Life Event.

(If you need to make any corrections, return to the "Make Coverage Elections" step before the enrollment deadline.)

### Coverage Overview

Enrollment Status	Benefit Description	Enrolled Plan	Option	Effective Date	Amount	Employee Amount	Total Amount
Changed	Living Expenses	Family	T-FREE	12/31/2008	0	92.31	92.31
<b>Total</b>					0	92.31	92.31

I have read the above statement

A confirmation is displayed with a **[Sign]** button for signing the confirmation. Once submitted, the Status of the benefit enrollment line in the Welcome to Open Enrollment screen is changed from Pending to Submitted. The **Enroll Now** link is changed to **Review Changes**, and the employee may click on this link to review the changes made. The request will be available to the approver to approve in the Open Enrollment Approval screen.

If the request is rejected, the link for the Action in the Welcome to Open Enrollment screen gets updated to **"Make More Changes"**, and the employee can click on this link to make further changes and re-submit for approval.

## Add Dependent

Effective Date	<input type="text" value="02/15/2011"/>	Comment	<input type="text"/>
----------------	---	---------	----------------------

First Name	<input type="text" value="Jacqueline"/>	Last Name	<input type="text" value="Patton"/>	Middle Name	<input type="text"/>
Date Of Birth	<input type="text" value="04/24/1995"/>	SSN (no space/hyphen)	<input type="text" value="780124570"/>		
Relation	<input type="text" value="Child"/>	Priority	<input type="text" value="Highest"/>		
Phone	<input type="text" value="(312) 405-1029"/>	Alter Phone	<input type="text"/>	Cell Phone	<input type="text" value="(312) 394-2039"/>
Pager	<input type="text"/>	Fax	<input type="text"/>	E-Mail Address	<input type="text"/>
Address Line 1	<input type="text" value="40 Plum Road"/>				
Address Line 2	<input type="text" value="Chicago"/>				
Address Line 3	<input type="text" value="Illinois"/>				
ZIP	<input type="text" value="60609"/>				
County	<input type="text"/>	City	<input type="text"/>		
State	<input type="text" value="Illinois"/>	Country	<input type="text" value="United States of America"/>	<input type="checkbox"/> Delete this record	

First Name	<input type="text" value="Mike"/>	Last Name	<input type="text" value="Patton"/>	Middle Name	<input type="text"/>
Date Of Birth	<input type="text" value="12/14/1960"/>	SSN (no space/hyphen)	<input type="text" value="561248790"/>		
Relation	<input type="text" value="Spouse"/>	Priority	<input type="text" value="Highest"/>		
Phone	<input type="text" value="(312) 405-1029"/>	Alter Phone	<input type="text"/>	Cell Phone	<input type="text" value="(312) 309-0909"/>
Pager	<input type="text"/>	Fax	<input type="text"/>	E-Mail Address	<input type="text"/>
Address Line 1	<input type="text" value="40 Plum Road"/>				
Address Line 2	<input type="text" value="Chicago"/>				
Address Line 3	<input type="text" value="Illinois"/>				
ZIP	<input type="text" value="60609"/>				
County	<input type="text"/>	City	<input type="text"/>		
State	<input type="text" value="Illinois"/>	Country	<input type="text" value="United States of America"/>	<input type="checkbox"/> Delete this record	

Dependents may be added/removed from the employee by pressing the **Add Dependent** link.

To make a dependent request, enter an **Effective Date**. A comment is optional.

To add dependents, press the blue Add icon **+** at the bottom-right of the current record, and enter the details for the Dependents. The First Name, Last Name, Date of Birth, SSN and Relation are required fields. Enter the details and save. To drop a dependent, check the **Delete this record** checkbox and hit **[Save]**.

To submit the changes, press the **[Submit]** button. The status will be changed to Submitted, and the request will be available in the Dependent Approval screen for the approver to approve.

Once approved, the status in Add Dependent will be changed to Approved. Once approved, the Current record is available for editing again.

## Report/Review Qualifying Event

A Qualifying Event is a change in status such as marriage, birth of a child, etc. that requires reporting, and changes to the benefit/deduction election. The period range for the qualifying event is determined by the number of days specified in Qualified Event Days in the Open Enrollment Control Setup screen.

Select the Event from the drop-down list and enter an **Effective Date** (Events are setup in the Qualify Event Setup screen). Select the Profile Change Confirmation Number and/or Dependent Change Confirmation Number if required.

To enter a note, press the **[Notes]** button. To add the note, press the **[Add]** button. When done, press the **[Save]** button.

To add an attachment, press the **[Attachments]** button.

To save the Qualifying Event, press the **[Save]** button. To submit the changes, press the **[Submit]** button, and the request will be displayed in the Qualifying Event Approval screen for approval. Once approved, the qualifying event will be displayed in the Open Enrollment screen, if the period range is current.

## Dependent Enrollment

Dependent Enrollment				
<input checked="" type="checkbox"/> Expand All	First Name	Last Name	Relation	Date of Birth
<input type="checkbox"/>	Mason	Richard	Child	2000-06-05
	Description	Plan	Effective Date	
<input checked="" type="checkbox"/>	Dental	BCBS	2008-06-20	Change Coverage
<input type="checkbox"/>	Mason	Myrna	Child	2002-06-02
	Description	Plan	Effective Date	
<input checked="" type="checkbox"/>	Dental	BCBS	2008-06-20	Change Coverage

Dependents can be enrolled in benefits/deductions by checking the dependent to be enrolled, and pressing the **[Submit]** button for approval. The blue Add icon **+** beside the benefit/deduction allows the user to see the details.

Notes may be entered by using the **[Notes]** button.

## Request and Review Vacation Balances

Code	Description	Eligible Days	Carried Forward Days	Accrued Days	Used Days	Remaining Days	CF Expire Date	CF Lost Days	Action
PERS	Personal Days	10	0	0	0	0		0	
PTD	Pad Time Off	15	0	0	0	0		0	
SICK	Sick Leave	7	0	0	0	0		0	
UPLV	Unpaid Leave	0	0	0	0	0		0	
VAC	Vacation	10	0	0	0	0		0	Create Request

This screen is used by employees to view their vacation balances, and to request vacations/unpaid leaves, and paid time off. There are options to view vacation uses and balances for current and previous years.

When users click the **[Drop Down Menu]** in the year field, or **[Prev/Next]** arrow that are located next to the year field, he can chooses to see vacation balances for this specific year.

In order to request Vacation, employees click **[View/Create Vacation Request]** in the right top corner of the screen. New screen opens.

Seq. No.	Start Date	End Date	Working Days	Code	Description	Note	Status	Delete
No Records Found								

Then Click **[Create Request]**.

vice Save Submit Cancel

Start Date:  End Date:  Working Days:

Leave Code:

Note:

Seq. No.	Start Date	End Date	Working Days	Code	Description	Note	Status	Delete
No Records Found								

First, user enters [Start Date] and [End Date] for vacation. Second, user clicks on [Leave Code] drop down menu and chooses the appropriate Leave code. It is optional whether to enter the note or not.

Then click [Submit].

vice Fernaz Haraji's Profile Home Logo

Save Submit Cance

Start Date: 02/04/13 End Date: 02/05/13 Working Days: 2

Leave Code:

Note:

Seq. No.	Start Date	End Date	Working Days	Code	Description	Note	Status	Delete
No Records Found								

Employee Leave Code List - Windows Internet Expl...

http://qa4v10.cmic.ca:7785/cmictf10x/PyLow/showPyemleaveLc

Find: %  Go Close

<< Prev Set 1 - 1 of 1 Next Set >>

Code	Description
VAC	Vacation

The next screen that opens shows user Sequence Number of vacation request, with all details and the status of the request. This request will be sent to the HR department for approve.

vice Create Request Back

Seq. No.	Start Date	End Date	Working Days	Code	Description	Note	Status	Delete
7	02/04/2013	02/05/2013	2	VAC	Vacation	Please approve my vacation.	Submitted	

After a Vacation Request is approved, its status is set to "Approved".

vice Create Request Back

Seq. No.	Start Date	End Date	Working Days	Code	Description	Note	Status	Delete
7	02/04/2013	02/05/2013	2	VAC	Vacation	Please approve my vacation.	Approved	

# Pay Stub Printing

vice Print Back

2010-09-27 ~ 2010-10-03 PREV NEXT 2010-09-27~2010-10-03

Total Net Pay : \$818.27

Pay Stub Details for Employee : Patton,Hazel Year : 2010 Period: 40 Company: SSConstruction Company

**Company** SSConstruction Company  
**Employee** Patton,Hazel  
**Employee Number** SS-WK-SAL40

**Pay Period:** Sep-27-2010 To Oct-03-2010

Description	Tran Type	Hours	Pay Amount	Adjustment	Net Pay	Description	Tran Type	Deduction Amount	Adjustment	Net Deduction
Normal Hours	BW	40	\$1,538.46	\$0	\$1,538.46	401K	DE	-\$261.54	\$0	-\$261.54
						City Tax	TX	-\$41.48	\$0	-\$41.48
						SD EE	TX	-\$0.6	\$0	-\$0.6
						Fed / FIT	TX	-\$228.24	\$0	-\$228.24
						Med FICA EE	TX	-\$22.3	\$0	-\$22.3
						SS FICA EE	TX	-\$95.38	\$0	-\$95.38
						State Tax	TX	-\$70.65	\$0	-\$70.65
<b>Gross Hours</b>			<b>Gross Pay Amount</b>	<b>Gross Pay Amount Adjustment</b>	<b>Gross Net Pay</b>	<b>Gross Deduction Amount</b>		<b>Gross Deduction Adjustment Amount</b>		<b>Gross Net Deduction</b>
40.00			\$1,538.46	\$ 0.00	\$1,538.46	-\$720.19		\$ 0.00		-\$720.19
<b>Total Net Pay</b>						<b>\$818.27</b>				

This screen is used by employees to view or print their Pay Stubs. The employee may select a Pay Stub from the drop-down list at the top of the screen. To print it, the **[Print]** button is used.

# Direct Deposit Accounts

**Employee Self Service** Save Submit Cancel Print Home Logout

**Direct Deposits and Checks Accounts**

Priority	Percentage	Split Type	Bank Code	Name	Branch Code	Name	Transaction Code	Account Number		
No Records Found										
Transaction No	Date	Comments						PREV	NEXT	Current

**Instructions:**  
 How to make a change request for direct deposit

Effective Date:   Comment:



This screen is used by employees to enter or update their direct deposit account details.

To make changes, first enter the **[Effective Date]**, then click the blue Add icon .

**Employee Self Service** Save Submit Cancel Print Home Logout

**Direct Deposits and Checks Accounts**

Priority	Percentage	Split Type	Bank Code	Name	Branch Code	Name	Transaction Code	Account Number		
No Records Found										
Transaction No	Date	Comments						PREV	NEXT	Current

**Instructions:**  
 How to make a change request for direct deposit

Effective Date: 020217  Comment:

		Type: Direct Deposit	Percentage: 60	Bank Code: AMEGY   AMEGY BANK	Branch Code: MAIN   AMEGY-Main	Bank Account Number: 87868687675			
		Type: Direct Deposit	Percentage: 40	Bank Code: BOH   Bank of Hawaii	Branch Code: MAIN   Bank of Hawaii - Main	Bank Account Number: 45455618834			



Then, fill out the mandatory fields: **Type, Percentage, Bank Code, Branch Code** and **Bank Account Number**.

Once finished, click **[Submit]** to submit the changes for approval.

By clicking the blue Add icon , user can enter more direct deposit accounts, but the total of their **Percentage** fields must equal 100.

**NOTE:** If one or more direct deposit accounts are on file, with their **Percentage** fields equaling 100, adding an account will overwrite the old account details with the new account details.

## Year End Summary

The screenshot shows the 'Employee Self Service' interface. On the left is a navigation tree with categories like Personal Information, Payment Administration, Corporate Learning, Recruiting, Corporate Information, Security, and Manager Self Service. The 'Year End Summary' option is selected. The main area displays a table with columns for Year, Column Name, and Amount. The data is as follows:

Year	Column Name	Amount	Column Name	Amount	Column Name	Amount	Column Name	Amount	Column Name	Amount	Column Name	Amount	Column Name	Amount	Column Name	Amount	Column Name	Amount
2008	Basic Wages	119805.8		0		0		0		0		0		0		0		0
2010		0	Deduction	-40		0	Dental	1200		0		0		0		0		0

This screen shows a list of the information defined under the 'Self Service Year End Summary' definition of W2 Mapping (Forms version), for all years that the employee has worked, except for the current payroll year.

# Corporate Learning

## Class Enrollment

Assigned Classes								
Class Code	Class Name	Course Name	Module Name	Start Date	Completion Date	Status	By	Action
SAFETYCLAS	Basic Safety	Company Safety Training	Safety 10002	09/14/2013		Applied	Mike Fern	✘

This screen allows employees to enroll themselves in different classes.

Use the **[Add New]** button to select a class from a list of classes not yet taken.

This displays a multi select list of values, when the required classes have been selected use the **[Update]** button to enroll into the selected classes.

## Training Nomination

Classes							Show Employees
Class Code	Class Name	Course Name	Module Name	Start Date	Completion Date	Location	
123456	Basic Computer Skills			10/Aug/2011		Classroom 101	
ZZ-SAFETY	Basic Safety	Company Safety Training	Basic Safety	17/Aug/2011	18/Aug/2011	Training 1	
CPR_FEE	CPR 01 module introduction	CPR for employees	CPR 01-100	04/Feb/2013	05/Feb/2013		
CLASS1	Introduction to PM	Project Manager Training	Introduction to PM	24/Aug/2011	07/Jun/2011	Head Office - Training Room 100	
1234	Introduction to PM	Project Manager Training	Introduction to PM	03/Dec/2012	07/Dec/2012	Head Office - Training Room 100	
MS - CL1	MS Office	MS Office	MS Office	31/Aug/2011	22/Jun/2011		
DEC2012	MS Office	MS Office	MS Office	11/Dec/2012	11/Dec/2012	Cmic	
MS005	MS Office	MS Office	MS Office	24/Jan/2013	25/Jan/2013		

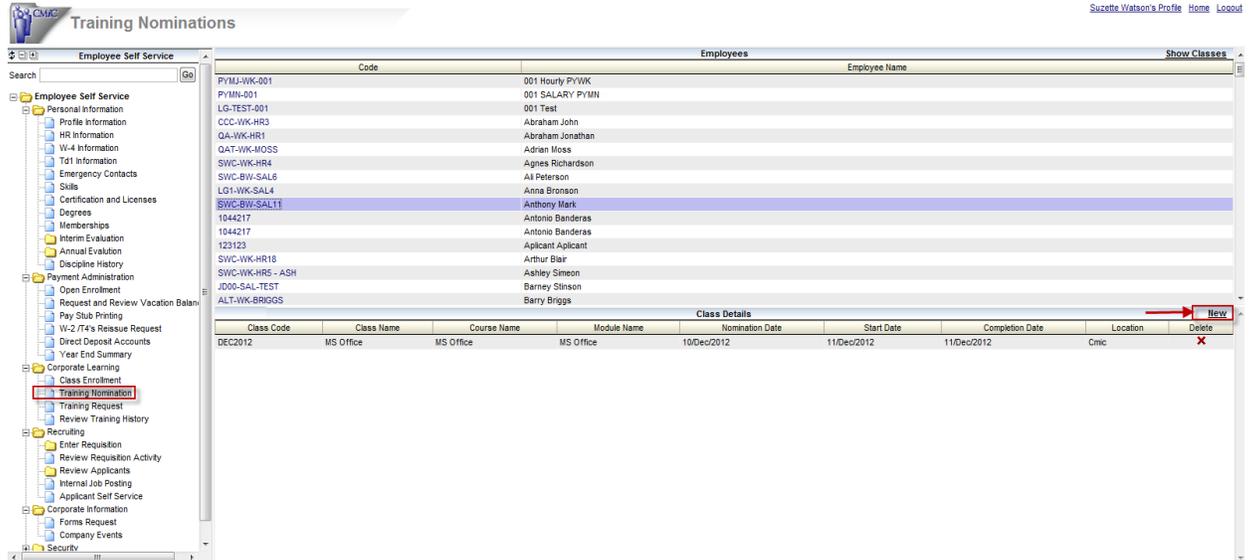
Employee Details			New
Code	Name		Delete
LG1-WK-SAL4	Anna Bronaon		✘
LG-TEST-001	001 Test		✘
LG-TEST-001	001 Test		✘

This program allows user of the ESS module to nominate employees to different classes within Courses and Modules.

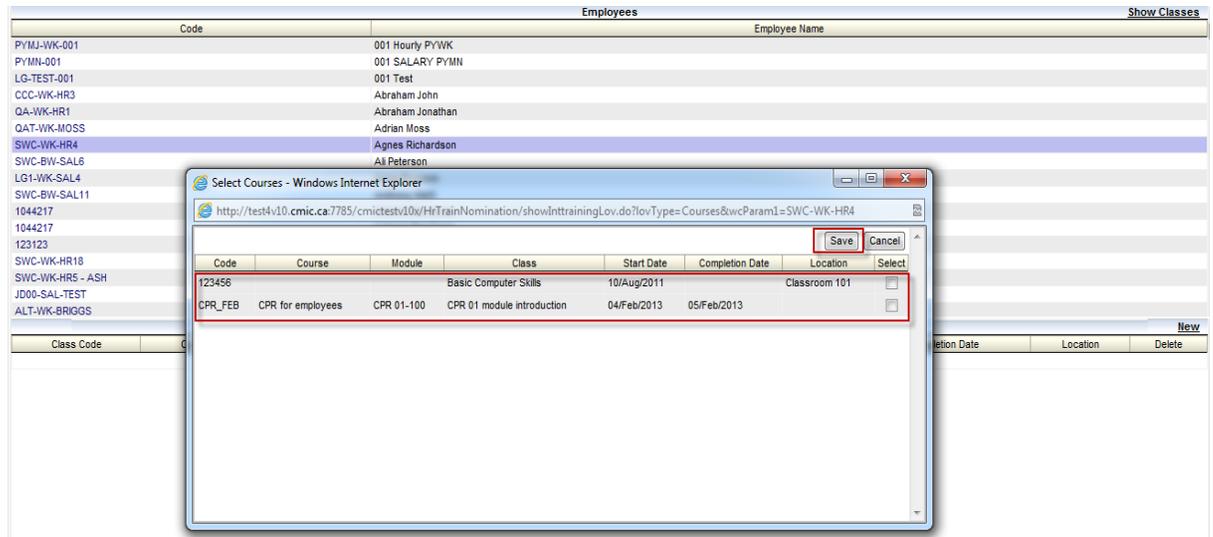
(I) When user clicks **[Show Classes]** in the right-top corner of the screen the list of classes is displayed. By clicking on the class code, user can see the list of employees that were nominated for this class.

On this screen, users can nominate new employees for a class by clicking [**New**], or delete the employee from the class by clicking on [**X**] in the Employee Details section.

(II) When user clicks [**Show Employees**] in the right-top corner of the screen, the list of employees is displayed. When users click on an Employee Code, the details of the class nominated for the employee can be seen in the lower section of the screen.



On this screen, users can nominate new employees for a class by clicking [**New**], or delete employee from the class by clicking on [**X**] in the Employee Details section.



List of available classes is displayed in the popup. Use the **Select** checkbox to select a class, then click [**Save**].

# Training Request

Class Enrollment

Suzette Watson's Profile Home Logout

Save Submit Delete Cancel

Employee Self Service

Transaction No Date Comments

Effective Date [ ] Comment [ ] Deleted Changed Added

Instructions:  
How to make a change request for training classes

Request for enrolling training classes

Code	Description	Start Date	Complete Date	Apply Date	Status	Select
<b>Enrolled/Completed training classes:</b>						
Classes applied:						
Classes to withdraw:						
<b>Other training classes available:</b>						
DEC2012	MS Office	2012-12-11 09:00:00	2012-12-11			<input type="checkbox"/>
MS595	MS Office	2013-01-24 01:00:00	2013-01-25			<input type="checkbox"/>
MS - CL1	MS Office	2011-08-31 09:00:00	2011-06-22			<input type="checkbox"/>
1234	Introduction to PM	2012-12-03 08:00:00	2012-12-07			<input type="checkbox"/>
CLASS1	Introduction to PM	2011-08-24 09:00:00	2011-06-07			<input type="checkbox"/>
ZZ-SAFETY	Basic Safety	2011-08-17 09:00:00				<input type="checkbox"/>
CPR_FEB	CPR 01 module introduction	2013-02-04 08:00:00	2013-02-05			<input type="checkbox"/>
123456	Basic Computer Skills	2011-08-10 09:00:00				<input type="checkbox"/>

If training classes are not available, please specify here:

This screen is used to request training, view enrolled classes, and to see classes completed in the past.

To enroll in a class, first enter an **Effective Date**, then select a class under the **Other training classes available** section. Click **[Submit]** when finished, to submit the request for approval.



# Recruiting

## Enter Requisition

Employee Self Service											
Requisitions											
ID	Date	Job Classification	Requested By	Proposed Hire Date	Proposed Job Title	Proposed Salary	Status	Hiring Office	Recruiter	Position Code	Position Name
0000044557	25-Feb-2013	Electrician Sr	BILL G	01-Mar-2013	Chief Estimator		Filled	New York	GB	0000000675	Chief Estimator
0000044558		SOFTWARE DEVELOPMENT	tauseef	24-Sep-2013	HR Manager		Filled	New York	George	0000000672	HR Development Manager
0000044559		Non Skilled	George Bai				Filled			0000000669	11.62778
0000044560		Not Applicable	George Bai		Goal Keeper		Filled			0000000678	Goal Keeper
0000044561		Carpenter			Carpenter		Filled			0000000679	Senior Carpenter
0000044562		Software Developer	Imran Ahmed	01-Jan-2011	Senior Java Developer	75,000.00	Pending			0000000680	Senior Java Developer
0000044563	01-Jul-2015	All Star Description			All Star Def Job Title		Filled			0000000674	All Star Position
44556	01-Jun-2007	RF New	Kevin	15-Jun-2007	Exec VP		Filled				Executive Vice President
JJJJ	04-Sep-2006			18-Sep-2006			Closed			VP1	First Vice President
JJJJJJJJJ		SOFTWARE DEVELOPMENT	someone	24-Sep-2013	Test Job Title		Active	New York		VP2	Second Vice President
KLJK	05-Sep-2006	RF New		19-Sep-2006			Active			PRESIDENT	President
REQ-2		Electrician					Hiring In Progress			0000000687	tttt
REQ-CEO	12-Oct-2007	RF New			Chief Executive Officer		Active	Los Angeles		CEO	CEO
REQ-SMGR	01-Mar-2008	Project Manager	Linda	01-May-2008	Sales Manager		Active	New York		SALE MGR	Sales Manager
REQ1		RF New					Active	Los Angeles		CIO	Chief Information Officer
Total (15 rows)											

This page allows the user to enter a requisition to the HR department to start the hiring process for a new or existing position.

The Hiring Requisitions page starts as a log, displaying all Requisitions. To edit an existing requisition, click its **ID** link. To add a new Requisition, use the [**Create Requisition**] button.

When entering the requisition, the Requisition Name, Job Description and Responsibilities will default from the Position selected. The Desired Attributes of the Requisition will default from the Job Classification. The Requisition Name defaults from the Job Title of the Position. If the Position Name is entered before the Job Classification, the associated Job Classification will be populated. The Hiring Office LOV provides a list of Geographical Areas.

Requisitions		
General	Desired Attributes	Actions
Requisition ID: 0000044557 Requested By: BILL G Job Classification: Electrician Sr Position Name: Chief Estimator Hiring Office: NY New York Requisition Name: Chief Estimator Proposed Salary: 0.00 Job Description: Chief Estimator Responsibilities: Chief Estimator Notes: Chief Estimator	Date: 25-FEB-2013 Proposed Hire Date: 01-MAR-2013 Status: Filled Type: Addition <input checked="" type="checkbox"/> Replacement <input type="checkbox"/> Recruiter: MNGR GB Full Time <input checked="" type="checkbox"/> Part Time <input type="checkbox"/> Temporary <input type="checkbox"/>	

There are three required fields when entering a Requisition: **Requisition ID**, **Job Classification** and **Position Name**.

- The Requisition ID must be unique; it can contain characters or numbers, with a maximum length of 10.

- Once the position is entered, the Requisition Name, Job Description and Responsibilities fields will be updated to match the position's definition.
- The Desired Attributes will default from the Job Classification.

Any of these defaulted fields may be changed, including the Desired Attributes.

**Pre-Requisites:**

**Mandatory:** Job Classification, Position Name, Requisition ID.

**Optional:** Hiring Actions, Skills, Education, Certification and Licenses, Training Courses and Modules, Memberships and Organizations

## Review Requisition Activity

Hr Requisition Activity										
Requisitions										
Requisition ID	Date Created	On		Job Classification						Search
Requisition ID	Requisition Date	Proposed Hire Date	Description	Status	Hiring Office					
KLJK	05-Sep-2006	19-Sep-2006	RF New	Active						
44556	01-Jun-2007	15-Jun-2007	RF New	Filled						
REQ-CEO	12-Oct-2007		RF New	Active	Los Angeles					
REQ-SMGR	01-Mar-2008	01-May-2008	Project Manager	Active	New York					
0000044557	25-Feb-2013	01-Mar-2013	Electrician Sr	Filled	New York					
0000044563	01-Jul-2015		All Star Description	Filled						
0000044558		24-Sep-2013	SOFTWARE DEVELOPMENT	Filled	New York					
0000044561			Carpenter	Filled						
0000044559			Non Skilled	Filled						
REQ-2			Electrician	Hiring In Progress						
0000044562		01-Jan-2011	Software Developer	Pending						
JJJJJJJJJJ		24-Sep-2013	SOFTWARE DEVELOPMENT	Active	New York					
REQ1			RF New	Active	Los Angeles					
0000044560			Not Applicable	Filled						
Actions										
Action Name	Cost Amount CG	Status	Notes	Action Date	From Date	To Date	Action taken by	Delete		
Requisition Is Active	0.00	COMPLETED	Requisition Is Active	20-Jun-2014			George Bai	✗		
Requisition Is Filled	0.00	COMPLETED	Requisition is filled. Applicant has been hired	16-Jan-2013			HR	✗		
Requisition Created		COMPLETED	Requisition Created	26-Mar-2008			HR	✗		

This screen is both an entry and a query screen, and when it first opens, it displays all requisitions. It is used to review the actions taken on one or more requisitions, it allows for the updating of existing actions taken, and it allows the entry of new actions taken.

**[Search] – Button**

To search for Requisitions, use the [Search] button search against the **Requisition ID**, **Date Created** and **Job Classification** fields.

**Requisition ID**

This field can be used to select a range of Requisition ID's by using the '%' wildcard characters either before or after the value – for example 1% will return any requisition ID that start with the number 1.

## Date Created

This is a drop down list that allows the user to select one of 3 values, On, Before or After to determine how to utilize the actual date field. This allows for the querying of requisitions created on a specific date or after a specific date.

## Job Classification

This field can be used to select a group of Positions with similar names by using the ‘%’ wildcard characters either before or after the value – for example “Elec%” will return any requisition IDs for any Job Classification where the title of the classification starts with “Elec”.

Once the required requisition has been found, highlight the requisition clicking on the linked field. This will then display all related action records in the bottom section of the screen.

## [Add] – Button (Add New Action Taken)

Hr Requisition Activity										
Requisitions										
Requisition ID	Date Created	On		Job Classification						Search
Requisition ID	Requisition Date	Proposed Hire Date	Description	Status	Hiring Office					
KLJK	05-Sep-2006	19-Sep-2006	RF New	Active						
44556	01-Jun-2007	15-Jun-2007	RF New	Filled						
REQ-CEO	12-Oct-2007		RF New	Active	Los Angeles					
REQ-SMGR	01-Mar-2008	01-May-2008	Project Manager	Active	New York					
Actions										
Action Name	Cost Amount CG	Status	Notes	Action Date	From Date	To Date	Action taken by	Delete		
Requisition Is Active	0.00	COMPLETED	Requisition Is Active	20-Jun-2014			George Bai	✘		
Requisition Is Filled	0.00	COMPLETED	Requisition is filled. Applicant has been hired	16-Jan-2013			HR	✘		
Requisition Created		COMPLETED	Requisition Created	26-Mar-2008			HR	✘		

To add an action to the requisition, use the [Add] button of the **Actions** section.

This will open up an area just under the bar where the action information can be entered:

Hr Requisition Activity										
Requisitions										
Requisition ID	Date Created	On		Job Classification						Search
Requisition ID	Requisition Date	Proposed Hire Date	Description	Status	Hiring Office					
KLJK	05-Sep-2006	19-Sep-2006	RF New	Active						
44556	01-Jun-2007	15-Jun-2007	RF New	Filled						
REQ-CEO	12-Oct-2007		RF New	Active	Los Angeles					
REQ-SMGR	01-Mar-2008	01-May-2008	Project Manager	Active	New York					
Actions										
Action Name	-- Select Action --	Cost Amount CG		Status	Pending	Action Date	07022017	Action taken by	MIKEF	
Notes						From Date		To Date		
Action Name	Cost Amount CG	Status	Notes	Action Date	From Date	To Date	Action taken by	Delete		
Requisition Is Active	0.00	COMPLETED	Requisition Is Active	20-Jun-2014			George Bai	✘		
Requisition Is Filled	0.00	COMPLETED	Requisition is filled. Applicant has been hired	16-Jan-2013			HR	✘		
Requisition Created		COMPLETED	Requisition Created	26-Mar-2008			HR	✘		

- Selected the Action Name from the drop down list (Required)
- If applicable enter the cost amount, this is for reference only
- Enter the status
- Enter the date of the action (Required)
- Enter the employee who performed the action. This defaults to the user id.
- Enter any notes and dates if necessary.

When complete use the [Save] button.

## Update Existing Action

**Hr Requisition Activity**

Requisitions

Requisition ID	Requisition Date	Proposed Hire Date	Description	Status	Hiring Office
KLJK	05-Sep-2006	19-Sep-2006	RF New	Active	
44556	01-Jun-2007	15-Jun-2007	RF New	Filed	
REQ-CEO	12-Oct-2007		RF New	Active	Los Angeles
REQ-SMGR	01-Mar-2008	01-May-2008	Project Manager	Active	New York

**Actions**

Action Name: ACTIVE Cost Amount CG: [ ] Status: COMPLETED Action Date: 20062014 Action taken by: MIKEF

Notes: Requisition Is Active

Action Name	Cost Amount CG	Status	Notes	Action Date	From Date	To Date	Action taken by	Delete
<a href="#">Requisition Is Active</a>	0.00	COMPLETED	Requisition Is Active	20-Jun-2014			George Bai	✗
Requisition Is Filled	0.00	COMPLETED	Requisition is filled. Applicant has been hired	16-Jan-2013			HR	✗
Requisition Created		COMPLETED	Requisition Created	26-Mar-2008			HR	✗

To edit an existing action taken, click its **Action Name** link. The selected Action will then be editable in the display area just above the table, as shown above. Update the information as required and click **[Save]**.

## Review Applicants

**Employee Self Service**

Add Applicant Show Filter Send To Spreadsheet Enter Query Logout

**Applicant**

Applicant #	Applicant Name	Job Classification	Apply Date
1234567890123546	John Doe	Not Applicable	15-Jul-2015
1234567890123547	Harper Steven		15-Jul-2015
1234567890123549	George Bai		22-Jul-2015

This page allows administrators to review, edit and delete applicant's information, and to add new applicants.

## [Add Applicants] – Button

Applicants

Save Cancel Logout

Applicant:

General Personal Miscellaneous Attributes Emp.History Attachments References Notes Application History HR Documents Additional Information

Source of Applicant: --Other--

Applicant No.:

Last Name:

Middle Name:

SSN (no space/hyphen):

Application Date: 07-Feb-2017

Last Modified Date:

First Name:

Employed As:

Status:

**Mailing Address**

Address 1:

Address 3:

Country:

Country:

Address 2:

ZIP:

State:

City:

**Physical Address**

Address 1:

Address 3:

Country:

Address 2:

ZIP:

State:

**Contact**

Home Phone:

Cell Phone:

Home Fax:

E-Mail Address:

Work Phone:

Pager:

Work Fax:

**Area Of Interest**

Area Of Interest:

Accounting  Labor  Management  sdsasdasda  Software Development

Other:

**Geographical Area**

Geographical Area:

Los Angeles  New York  Ohio

**Note**

To add an applicant, click the **[Add Applicant]** button along the top of the screen, which brings up the screen shown above.

After filling out all relevant and mandatory fields, click **[Save]**.

User have an option to **Delete**, **Edit** or **Print** applicants information, as well as go back to list of existing applicants **[ Back to Log]**.

## Edit Existing Applicant

To edit an existing Applicants record, when the screen is in Log mode, click the applicant's **Applicant Name** link. On the next screen, click the **[Edit]** button along the top of the screen.

## Applicant Self Service

Applicants

Delete Add Edit Print Back To Log Logout

**Sign In**

Applicant's e-mail address:

Enter Password:

Sign In Forgot Password?

[Register New User](#)

This screen allows users to create applicant profiles, to apply for different positions.

- A new user has to register by clicking [**Register New User**].

- Then an applicant has to fill out an E-mail address and Password. When the applicant fills out the application, he can choose the position that he wants to apply for by using the **Position you are applying for** list of values.

- After logging in, the applicant fill outs all relevant and mandatory fields and click [**Save**].

- Applicant can upload his/her resume by clicking [**Upload Resume**] as well as Edit his/her profile by clicking [**Edit**] buttons on the right upper corner of the screen.

- On the **Application History** tab, applicants can see the application history and status of the application.

Applicant: Austin Jane									
General	Education	Skills	License/Certificate	Training	Membership	Employment	References	Additional Information	Application History
Application Code	Job Classification Code	Description	Last Updated	Status	Requisition No				
2889433	1412	Accountant	Feb/15/2013	Applied					



# Corporate Information

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## Forms Request

The screen is used as display-only mode of the Forms Request node in Employee Self Service.



# Manager Self Service

## Request Approval – Screen

Transaction No	Create Date	Request Description	Employee Number	Employee Name	Effective Date	Comments	Request Status	Approve	Reject
190	25/Nov/2016	Profile	MF0001	Mike Fernandes	25/Nov/2016		Submitted	Approve	Reject
182	25/Nov/2016	Profile	AB-34368	Anand Badinger	25/Nov/2016		Submitted	Approve	Reject
181	25/Nov/2016	Profile	MR	Mike Rock	25/Nov/2016		Submitted	Approve	Reject
179	04/Jun/2015	Vacation Request	LG1-BW-HR5	Jane Austin	04/Jun/2015		Submitted	Approve	Reject
177	04/Jun/2015	Vacation Request	LG1-BW-HR5	Jane Austin	04/Jun/2015		Submitted	Approve	Reject
176	03/Jun/2015	Vacation Request	LG1-BW-HR5	Jane Austin	03/Jun/2015		Submitted	Approve	Reject
175	02/Jun/2015	W4	GL-WK-SAL123	GL-WK SAL23	01/May/2015	W4-for testing	Submitted	Approve	Reject
169	03/Sep/2014	Profile Under Review	LG1-BW-HR5	Jane Austin	01/Jan/2012		Under Review	Approve	Reject
157	10/Jun/2014	Dependent	LG1-BW-HR5	Jane Austin	03/Jun/2014		Submitted	Approve	Reject
126	31/Oct/2013	Vacation Request	LG1-BW-HR5	Jane Austin	31/Oct/2013		Submitted	Approve	Reject
115	25/Apr/2013	Profile	JCR TEST SAL	Test Salaried	01/Jun/2013		Submitted	Approve	Reject
21	05/Jun/2012	Direct Deposit	UFAR-EMP-01	Farnaz Harraj	01/Feb/2012		Submitted	Approve	Reject
20	25/Nov/2011	Profile	UFAR-EMP-01	Farnaz Harraj	25/Nov/2011		Submitted	Approve	Reject
8	11/Aug/2011	Emergency Contact	SWC-WK-SAL3	Suzette Watson	01/Aug/2011		Submitted	Approve	Reject
5	09/May/2011	Emergency Contact	DM100	Dallas McLean	02/May/2011		Submitted	Approve	Reject

Submitted requests, excluding those from Open Enrollment, are found in the **Request Approval** (Personal Information Change Request Approval) screen, where they may be approved or rejected. The blue **Approve** and **Reject** links at the end of each row are used to approve and reject requests.

When the request is approved or rejected, an e-mail notification is sent to the Employee's e-mail address, as specified on their Employee Profile.

The following table provides details for the columns of this screen:

Column	Details
<b>Transaction No</b>	This is an identifying transaction number for a Change Request, which is also a link to launch the appropriate approval screen, such as the one below for Profile Change Requests:
<b>Create Date</b>	Date Change Request was created.
<b>Request Description</b>	Type of employee information for Change Request (e.g., Profile, Vacation Request, W4, Dependent...).
<b>Employee Number</b>	Employee's employee number.

**Employee Name** Employee's name.

**Effective Date** Date change is to be effective.

Use this field to enter comments/notes for the employee, in regards to the approved or rejected Change Request. As shown below, if comments are entered, the **Show All Comments** link will be visible when the approved/rejected record is selected by the employee.

**Comments**

Transaction No Effective Date Comments

194 2017-01-09 Show All Comments

Instructions: Make changes to the employee Profile.

Request for change of employee profile

Effective Date 01/09/2017 Comment I currently don't have a work number yet, but when provided, I'll enter it via ESS.

Personal information

Last Name Pansaki First Name Jasmine Middle Name

Status of Change Request:

<b>Request Status</b>	<b>Submitted</b>	Submitted by Employee, and not yet modified by an admin.
	<b>Under Review</b>	Change Request was edited and saved in the screen launched by clicking the <b>Transaction No</b> link, using the screens [Edit] and [Save] buttons.

Note that approved and rejected Change Requests are removed from this screen. Only Change Requests requiring approval operations are listed.

**Approve**

Click to approve the Change Request; once approved, it is removed from this screen, and an e-mail notification is sent to the employee.

**Reject**

Click to reject the Change Request; once rejected, it is removed from this screen, and an e-mail notification is sent to the employee.

## Approval Privileges for ESS Admins

Hr Role Maintenance

Code ESS-MINGER Description ESS Manager

Select All Privileges

Employee Profile Employee Direct Deposit

Employee Vacation Balance Employee Pay Stub

Object ( Select All ) View ( Select All ) Edit ( Select All ) Reject ( Select All ) Approve ( Select All )

Profile Emergency Contact

Sample of HR Role Maintenance screen; standard Treeview path: **HCM > File Maintenance > HR Role Maintenance**.

Change Request records can be viewed, approved and rejected by ESS Administrators, depending on the Approval privileges granted to the HR Security Role assigned to them.

Also, for Change Requests to change Profile Information, if the ESS Administrator has the "Edit" Approval privilege for Profile Information, the administrator can edit the submitted Change Request.

For further details, please refer to the *HR Security Roles Setup* section of this guide.

## Viewing Change Requests

To view the details of a submitted Change Request, simply click its **Transaction No** link, and a popup will appear to display its details.

## Approving & Rejecting Requests

Transaction No	Create Date	Request Description	Employee Number	Employee Name	Effective Date	Comments	Request Status	Approve	Reject
194	13/Jan/2017	Profile	JP	Jasmine Pansaaki	09/Jan/2017	I currently don't have a work number yet, but when provided, fill enter it via ESS.	Submitted	Approve	Reject
182	25/Nov/2016	Profile	AB-34356	Anand Badinger	25/Nov/2016		Submitted	Approve	Reject
179	04/Jun/2015	Vacation Request	LG1-BW-HR5	Jane Austin	04/Jun/2015		Submitted	Approve	Reject
177	04/Jun/2015	Vacation Request	LG1-BW-HR5	Jane Austin	04/Jun/2015		Submitted	Approve	Reject
176	03/Jun/2015	Vacation Request	LG1-BW-HR5	Jane Austin	03/Jun/2015		Submitted	Approve	Reject
175	02/Jun/2015	W4	GL-WK-SAL123	GL-WK SAL23	01/May/2015	W4-for testing	Submitted	Approve	Reject
169	03/Sep/2014	Profile Under Review	LG1-BW-HR5	Jane Austin	01/Jan/2012		Under Review	Approve	Reject
157	10/Jun/2014	Dependent	LG1-BW-HR5	Jane Austin	03/Jun/2014		Submitted	Approve	Reject
126	31/Oct/2013	Vacation Request	LG1-BW-HR5	Jane Austin	31/Oct/2013		Submitted	Approve	Reject
115	25/Apr/2013	Profile	JCR TEST SAL	Test Salaried	01/Jun/2013		Submitted	Approve	Reject
21	05/Jun/2012	Direct Deposit	UFAR-EMP-01	Farnaz Harraj	01/Feb/2012		Submitted	Approve	Reject
20	25/Nov/2011	Profile	UFAR-EMP-01	Farnaz Harraj	25/Nov/2011		Submitted	Approve	Reject
8	11/Aug/2011	Emergency Contact	SWC-WK-SAL3	Suzette Watson	01/Aug/2011		Submitted	Approve	Reject
5	09/May/2011	Emergency Contact	DM100	Dallas McLean	02/May/2011		Submitted	Approve	Reject

To approve and reject Change Requests, the **Approve** and **Reject** links on the main Request Approval screen must be used, even if the [Approve] or [Reject] buttons were used in the popup launched by clicking a Change Request's **Transaction No** link.

When a request is approved or rejected, the Employee will be notified via e-mail, and the approved/rejected record will be available to the Employee in the screen used to request the change, as shown below.

Transaction No	Effective Date	Comments
191	2017-01-13	Profile(Current)
193	2017-01-13	Profile(Current)

**Instructions:**  
Make changes to the employee Profile.

**Request for change of employee profile**

Effective Date:  Comment:

## Communication Between Employees & Admins via Comments

Transaction No: 203 Effective Date: 2017-01-30

Comments: 2017-01-30 No home phone provided, as I only have a cell phone.

**Personal information**

Last Name: Fernandes First Name: Mike  
 Middle Name:   
 Prefix Title:  Suffix to Name:   
 Marital Status: Single SSN (no space/hyphen): 988543765  
 Date of Birth: 071277

**Mailing Address**

Address Line 1: 456 Lala Lane

Sample of Change Request for Profile Information, with comments entered by employee for administrator.

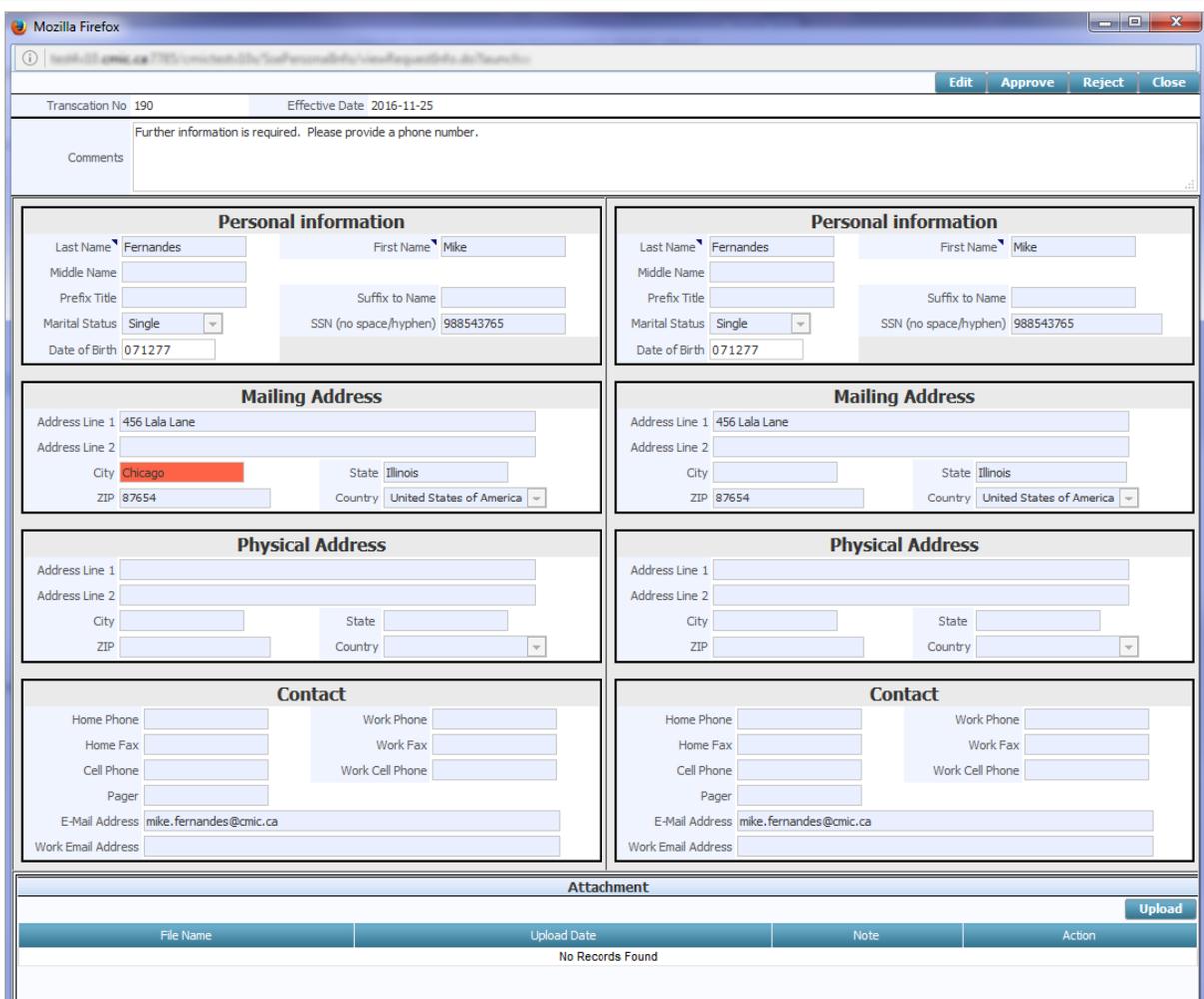
Communication between Employees and ESS Administrators is done via comments.

As shown above, if comments were entered for the administrator, they would show up in the **Comments** textbox. Also, the **Comments** textbox can be used to provide comments for the employee.

If any comments were entered for the approved/rejected Change Request by an administrator, the **Show All Comments** link will be visible, as shown below, when the approved/rejected record is viewed by the employee.



## Profile Information – Change Request



Sample of Profile Change Request Approval screen.

Shown above is a sample of the Change Request popup for Profile Information.

For Change Requests for Profile Information, if the ESS Administrator has the “**Edit**” Approval privilege for Profile Information, the administrator can edit the submitted Change Request via the [Edit] button.

To edit a submitted Change Request for Profile Information, press the [Edit] button and make any necessary changes to the record on the left pane. The Request Status on the Personal Information Change Request Approval screen will be changed from “Submitted” to “Under Review”.

To approve a submitted request, press the [Approve] button. Once approved, the Employee Profile will be updated with the new changes and a history record will be created in Payroll. The Current Profile will be updated with the new changes, and it will be available for editing in the Profile Information screen. A history of approved records is kept via the drop-down list at the top of the Profile Information screen. Also, the request will be removed from the list of submitted requests in the Request Approval screen.

To reject a submitted request, press the [Reject] button. The rejected record will become available for editing again by the employee in the Profile Information screen so that it may be re-submitted. The request will also be removed from the list of submitted requests in the Request Approval screen.

## W-4 – Change Request

Transaction No	Date	Comments	Approve	Reject	Close
491	2010-11-22	Updating W-4 2010			

Effective Date: 10152010 Comment: Updating W-4 2010

Page 1, go to page 2

### Form W-4 (2010)

**Purpose.** Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Consider completing a new Form W-4 each year and when your personal or financial situation changes.

**Exemption from withholding.** If you are exempt, complete only lines 1, 2, 3, 4, and 7 and sign the form to validate it. Your exemption for 2010 expires February 16, 2011. See Pub. 505, Tax Withholding and Estimated Tax.

**Note.** You cannot claim exemption from withholding if (a) your income exceeds \$950 and includes more than \$300 of unearned income (for example, interest and dividends) and (b) another person can claim you as a dependent on their tax return.

**Basic instructions.** If you are not exempt, complete the **Personal Allowances Worksheet** below. The worksheets on page 2 further adjust your withholding allowances based on itemized deductions, certain credits, adjustments to income, or two-earner/multiple job situations.

Complete all worksheets that apply. However, you may claim fewer (or zero) allowances. For regular wages, withholding must be based on allowances you claimed and may not be a flat amount or percentage of wages.

**Head of household.** Generally, you may claim head of household filing status on your tax return only if you are unmarried and pay more than 50% of the costs of keeping up a home for yourself and your dependent(s) or other qualifying individuals. See Pub. 501, Exemptions, Standard Deduction, and Filing Information, for information.

**Tax credits.** You can take projected tax credits into account in figuring your allowable number of withholding allowances. Credits for child or dependent care expenses and the child tax credit may be claimed using the **Personal Allowances Worksheet** below. See Pub. 919, How Do I Adjust My Tax Withholding, for information on converting your other credits into withholding allowances.

**Nonwage income.** If you have a large amount of nonwage income, such as interest or dividends, consider making estimated tax payments using Form 1040-ES, Estimated Tax for Individuals. Otherwise, you may owe additional tax. If you have pension or annuity income, see Pub. 919 to find out if you should adjust your withholding on Form W-4 or W-4P.

**Two earners/Multiple jobs.** If you have a working spouse or more than one job, figure the total number of allowances you are entitled to claim on all jobs using worksheets from only one Form W-4. Your withholding usually will be most accurate when all allowances are claimed on the Form W-4 for the highest paying job and zero allowances are claimed on the others. See Pub. 919 for details.

**Nonresident alien.** If you are a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, before completing this Form.

**Check your withholding.** After your Form W-4 takes effect, use Pub. 919 to see how the amount you are having withheld compares to your projected total tax for 2010. See Pub. 919, especially if your earnings exceed \$130,000 (Single) or \$180,000 (Married).

#### Personal Allowances Worksheet (Keep for your records.)

A Enter "1" for yourself if no one else can claim you as a dependent  
 You are single and have only one job; or  
 B Enter "1" if: You are married, have only one job, and your spouse does not work; or  
 Your wages from a second job or your spouse's wages (or the total of both) are \$1,500 or less.  
 C Enter "1" for your spouse. But, you may choose to enter "-0-" if you are married and have either a working spouse or more than one job. (Entering "-0-" may help you avoid having too little tax withheld.)  
 D Enter number of dependents (other than your spouse or yourself) you will claim on your tax return  
 E Enter "1" if you will file as head of household on your tax return (see conditions under Head of household above)  
 F Enter "1" if you have at least \$1,800 of child or dependent care expenses for which you plan to claim a credit  
 (Note. Do not include child support payments. See Pub. 503, Child and Dependent Care Expenses, for details.)  
 G Child Tax Credit (including additional child tax credit). See Pub 972, Child Tax Credit, for more information.  
 If your total income will be less than \$61,000 (\$90,000 if married), enter "2" for each eligible child; then less "1" if you have three or more eligible children.  
 If your total income will be between \$61,000 and \$84,000 (\$90,000 and \$119,000 if married), enter "1" for each eligible child plus "1" additional if you have six or more eligible children.  
 H Add lines A through G and enter total here. (Note. This may be different from the number of exemptions you claim on your tax return.)

For accuracy, complete all worksheets if you plan to itemize or claim adjustments to income and want to reduce your withholding, see the Deductions and Adjustments Worksheet on page 2 that apply.  
 If you have more than one job or are married and you and your spouse both work and the combined earnings from all jobs exceed \$18,000 (\$32,000 if married) see the Two-Earners/Multiple Jobs Worksheet on page 2 to avoid having too little tax withheld.  
 If neither of the above situations applies, stop here and enter the number from line H on line 5 of Form W-4 below.

A	1
B	1
C	1
D	2
E	1
F	1
G	2
H	9

Form **W-4**  
 Department of the Treasury  
 Internal Revenue Service

**Employee's Withholding Allowance Certificate**  
 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.

OMB No. 1545-0074  
**2010**

1 Type or print your first name and middle initial.  
 Alfred

Last Name  
 Jonas

2 Your social security number  
 315695012

Home address (number and street or rural route)  
 [Redacted]

3  Single  Married  Married, but withhold at higher Single rate

Note. If married, but legally separated, or spouse is a nonresident alien, check the "Single" box.

To access the W-4 for approval, click on the **Transaction No.** of the request to be approved in the Request Approval screen.

To approve the W-4 request, press the [Approve] button. Once approved, the Employee Profile in Payroll will be updated. A new Employment History record will be created, and the Federal Filing Status will be updated to reflect the status (Single/Married) entered in line 3 on the W-4. The Federal Filing Status for “Single” is “01” and “Married” is “02”.

The Primary Exemption field on the **Tax Tab** of the Employee Profile will be updated with the value entered in line 5 on the W-4 screen. Federal Withholding tax will be inserted in the Overrides pop-up on the **Tax** tab of the Employee Profile, with the value entered in line 6 on the W-4. The Tax Amount will be the value from line 6 and the Amount Type will be "00" (Additional Tax). Once approved, the Original W-4 will be editable again, and will be updated with the latest changes that were approved.

To reject the W-4 request, press the **[Reject]** button. The record with the same transaction number will be editable in the W-4 Information screen for further changes.

The W-4 may also be approved or rejected by clicking on the Approve or Reject link in the Personal Information Change Request Approval screen.

## Auto Approved Request List – Screen

Auto Approved Request List								
Transaction No	Request Create Date	Request Description	Employee Number	First Name	Last Name	Request Effective Date	Comments	Submit Status
188	11/25/2016	Certificate/License	AB-34356	Anand	Badinger	11/25/2016		A
117	04/25/2013	Certificate/License	JCR TEST SAL	Test	Salaried	04/07/2013	just got it	A
91	02/11/2013	Membership	LG1-BW-HR5	Jane	Austin	01/01/2013		A
83	02/11/2013	Certificate/License	LG1-BW-HR5	Jane	Austin	01/01/2013		A
78	02/11/2013	Skill	LG1-BW-HR5	Jane	Austin	01/01/2013		A
53	01/28/2013	Membership	SWC-WK-SAL3	Suzette	Watson	01/01/2012		A
51	01/23/2013	Membership	LG1-BW-HR10	Kim	Preston	01/01/2013		A
45	01/02/2013	Skill	SUS-EMP01	Glenda	Stimpson	01/02/2013	for 12.73003 testing	A

Submitted and approved requests to add/remove Skills, Education, Certifications/Licenses and Memberships are displayed in this log. Submitted requests are displayed with a status of "S", and approved requests are displayed with a status of "A".

Skills, Education, Certifications/Licenses and Memberships with a status of "A" have either been approved manually or automatically without going through the normal approval process.

Requests are automatically approved after submittal when the flag is checked in the Self Service Control Setup screen.

The screenshot shows the 'Auto Approved Request List' interface. On the left, a list of request types is visible, with 'Skill' selected. The main area displays a detailed view for a specific request (Transaction No. 340). The request is titled 'Request for change of skills' and shows a table with the following data:

Skill Code	Skill Description	Experience (Months)	Status
ADM-1001	Experience - MS Office	52	Added

Below the table, there is a section for 'Attachment' with a table showing 'File Name', 'Upload Date', and 'Note'. The message 'No Records Found' is displayed in this section.

Users may click on the **Transaction No.** of any record to view the details.

# Manager Change Request – Screen

This screen is used by administrators to request a change to an Employee Profile record.

The admin chooses the Employee Number, Action, and Effective Date, then makes a required change.

Then [Submit] the change.

After the request for change has been submitted, it cannot be edited or changed on the same screen.

# On Board Action – Screen

This functionality is currently not used.

## Open Enrollment Control Setup – Screen

This Control File for Open Enrollment is used to specify the Open Enrollment Rule, Qualified Event Days and Confirmation Statement.

If the Open Enrollment rule is set to Passive Enrollment, the employee may review the changes made to their benefit/deduction elections but they do not have to make any changes and their current plans will continue after the period end date. For Non-Passive Enrollment, the employee must make their elections before the period end date.

The Qualified Event Days is the number of days that the employee has to make their benefit elections after the effective date of the Qualifying Event which is specified when reporting the Qualifying Event. The period start date for the Qualifying Event in the Open Enrollment screen will be the Qualifying Event effective date. The period end date is the Qualifying Event period start date + the number of days in the Qualified Event Days set up in the Control File.

The Confirmation Statement entered here will be displayed when the user submits changes to their benefit/deduction elections for approval.

## Open Enrollment Period Setup – Screen

Open Enrollment Periods				
Year	Start Date	End Date	Effective Date	Action
2012	01/01/2012	01/01/2014	01/01/2012	X
2013	01/01/2013	12/31/2013	01/01/2013	X
2011	01/01/2011	12/31/2011	01/01/2011	X
2014	01/01/2012	12/31/2014	05/01/2014	X

The time during which the employee may make changes to their benefit/deduction elections is specified in this screen. This period range applies to “General” changes to the benefit/deduction elections, not Qualifying Event benefit/deduction elections.

Only one link (e.g. “Enroll Now”) will appear in the Open Enrollment screen at a time. If the link is on a “General” period, it will only appear during the period dates specified here. The Start Date and End Dates in the Welcome to Open Enrollment screen will reflect the period dates entered here. After this time, the period will not be displayed in Open Enrollment and the employee will not be able to make any changes in that period.

# Qualify Event Setup – Screen

Qualify Events							Add
Code	Name	Description	Profile Confirmation Required	Dependent Confirmation Required	Action		
ADOPTION	Adoption - Qual Event	Adoption of child - Qualifying Event	N	Y			
BIRTH	Birth of child - Qual Event	Birth of a child - Qualifying Event	N	Y			
MARRIAGE	Marriage - Qual Event	Marriage - Qualifying Event.	Y	Y			

This setup screen allows employees to define different types of Qualifying Events.

These Qualifying Events may be submitted for approval so that new enrollments or changes to current elections may be made. To add a Qualifying Event, press the [Add] button.

Qualify Events							Save	Cancel	
Code	MARRIAGE	Name	Marriage - Qual Event						
Description	Marriage - Qualifying Event.								
Require Confirmation of Profile Change	<input checked="" type="checkbox"/>		Require Confirmation of Dependent Change	<input checked="" type="checkbox"/>					
Qualify Events									
Code	Name	Description	Profile Confirmation Required	Dependent Confirmation Required	Action				
ADOPTION	Adoption - Qual Event	Adoption of child - Qualifying Event	N	Y					
BIRTH	Birth of child - Qual Event	Birth of a child - Qualifying Event	N	Y					
MARRIAGE	Marriage - Qual Event	Marriage - Qualifying Event.	Y	Y					

Enter the Code, Name and Description. Check the Require Confirmation of Profile Change flag and/or Require Confirmation of Dependent Change flag if necessary. When done, press the [Save] button or [Cancel] to exit. If the Require Confirmation of Profile Change flag or Require Confirmation of Dependent Change flag is checked, then the Profile request or Dependent request associated with this Qualifying Event must be selected when submitting a Qualifying Event for approval.

# Open Enrollment Approval – Screen

<input type="checkbox"/> Select	Employee No	Employee Name	Confirmation Date	Confirmation Number
<input type="checkbox"/>	SS-WK-HR37	Jessica Lange		4884
<input checked="" type="checkbox"/>	SS-WK-SAL40	Hazel Patton		4899

Use This Effective Date

### Coverage Comparison

Current Enrollment							Requested Changes										
Benefit Description	Enrolled Plan	Option	Effective Date	Employee Amount	Employer Amount	Total Amount	Benefit Description	Enrolled Plan	Option	Effective Date	Employee Amount	Employer Amount	Total Amount				
Living Expenses	Single	T-FREE	12/31/2008	0	76.92	76.92	Living Expenses	Family	T-FREE	12/31/2008	0	92.31	92.31				
Total						0	76.92	76.92	Total						0	92.31	92.31

Benefit/Deduction elections that have been submitted are available in the Open Enrollment Approval screen to be approved or rejected.

If the request is approved, the benefits/deductions will be elected for the employee and HR/Payroll will be updated. The Election By Employee and Election by Plans screens in HR should be updated, and the Employee Benefits Maintenance and Employee Deductions Maintenance screens in Payroll should be updated. If the request is rejected, it is removed from the Open Enrollment Approval screen and the employee will have to make more changes in Open Enrollment and then re-submit.

An email notification is sent to the employee's email address as specified on the Employee Profile when the request is approved or rejected.

# Qualifying Event Approval – Screen

Employee Qualifying Events Approval								
Employee Number	Employee Name	Event	Effective Date	Status	Profile Confirmation Number	Dependent Confirmation Number		
SS-WK-SAL46	Elizabeth Rivers	Marriage - Qual Event	09/20/2010	Submitted	265			
SS-WK-SAL40	Hazel Patton	Marriage - Qual Event	10/21/2010	Submitted	281	276		

Review Profile Change | Review Dependent Change | Notes | Attachments | Approve | Reject

---

Qualifying Event

Event: Marriage - Qual Event      Effective Date: 10/21/2010

Event Description: Marriage - Qualifying Event

Qualifying Events that have been submitted are displayed in the Qualifying Events Approval screen for approval.

Select the Qualifying Event for the employee that will be approved.

Employee Qualifying Events Approval					
Employee Number	Employee Name	Event	Effective Date	Status	Profile Confirmation Number
SS-WK-SAL46	Elizabeth Rivers	Marriage - Qual Event	09/20/2010	Submitted	265
SS-WK-SAL40	Hazel Patton	Marriage - Qual Event	10/21/2010	Submitted	281

http://wintest2006.cmic.ca:7779/cmico4/test2006/5sePersonalInfo/reviewProfile.do?requestOraseq - Windows Internet Explorer

**Personal information**

Last Name: Patton      First Name: Hazel

Middle Name:

Prefix Title:       Suffix to Name:

Marital Status:       SSN (no space/hyph): 794586012

Date of Birth: 06/13/1975

**Personal information**

Last Name: Patton      First Name: Hazel

Middle Name:

Prefix Title:       Suffix to Name:

Marital Status:       SSN (no space/hyph): 794586012

Date of Birth: 06/13/1975

**Mailing Address**

Address Line 1: 40 Plum Road

Address Line 2:

Address Line 3: Chicago

ZIP: 60609

**Mailing Address**

Address Line 1:

Address Line 2:

Address Line 3:

ZIP: 10001

**Physical Address**

Address Line 1:

Address Line 2:

Address Line 3:

ZIP:

City:       State: Illinois

Country: United States of America

**Physical Address**

Address Line 1:

Address Line 2:

Address Line 3:

ZIP:

City:       State: New York

Country: United States of America

**Contact**

Home Phone: (312) 405-9876      Home Fax:

Work Phone:       Work Fax:

Cell Phone:       Pager:

E-Mail Address:

**Contact**

Home Phone:       Home Fax:

Work Phone:       Work Fax:

Cell Phone:       Pager:

E-Mail Address: suzette.watson@cmic.ca

The [Review Profile Change] button displays the Profile record associated with the Qualifying Event that was assigned when submitting the Qualifying Event.

Employee Qualifying Events Approval						
Employee Number	Employee Name	Event	Effective Date	Status	Profile Confirmation Number	Dependent Confirmation Number
SS-WK-SAL46	Elizabeth Rivers	Marriage - Qual Event	09/20/2010	Submitted	265	
SS-WK-SAL40	Hazel Patton	Marriage - Qual Event	10/21/2010	Submitted	281	276

http://wintest2006.cmic.ca:7779/cmico4/test2006/SsePersonalInfo/reviewDependent.do?requestOras - Windows Internet Explorer

Close

Effective Date: 06/21/2010      Comment: \_\_\_\_\_

---

**Dependent Request**  
 Review Profile Change    Review Dependent Change

Effective Date: 10/21/2010

---

First Name: Jacqueline      Last Name: Patton      Middle Name: \_\_\_\_\_  
 Date Of Birth: 01/01/1995      SSN (no space/hyphen): 321212121  
 Relation: Child      Priority: Highest  
 Phone: (312) 394-0002      Alter Phone: \_\_\_\_\_      Cell Phone: (312) 450-0111  
 Pager: \_\_\_\_\_      Fax: \_\_\_\_\_      E-Mail Address: \_\_\_\_\_  
 Address Line 1: 40 Plum Road  
 Address Line 2: Chicago  
 Address Line 3: Illinois  
 ZIP: 60609  
 County: \_\_\_\_\_      City: \_\_\_\_\_  
 State: Illinois      Country: United States of America

---

First Name: Mike      Last Name: Patton      Middle Name: \_\_\_\_\_  
 Date Of Birth: 01/01/1970      SSN (no space/hyphen): 465897444  
 Relation: Spouse      Priority: Highest  
 Phone: (312) 394-0002      Alter Phone: \_\_\_\_\_      Cell Phone: (312) 454-2929  
 Pager: \_\_\_\_\_      Fax: \_\_\_\_\_      E-Mail Address: \_\_\_\_\_  
 Address Line 1: 40 Plum Road  
 Address Line 2: Chicago  
 Address Line 3: Illinois

The **[Review Dependent Change]** button displays the dependent record associated with the Qualifying Event that was assigned when submitting the Qualifying Event.

Employee Qualifying Events Approval						
Employee Number	Employee Name	Event	Effective Date	Status	Profile Confirmation Number	Dependent Confirmation Number
SS-WK-SAL46	Elizabeth Rivers	Marriage - Qual Event	09/20/2010	Submitted	265	
SS-WK-SAL40	Hazel Patton	Marriage - Qual Event	10/21/2010	Submitted	281	276

Notes - Windows Internet Explorer

Add    Close

Date	Author	Note	Action
2010-11-04	Hazel Patton	Submitting Qualifying Event - Marriage for Hazel Patton on 10/21/10.	Edit

Review Dependent Change    Notes

Event: Marriage - Qual Event

Event Description: Marriage - Qualifying Event.

The **[Notes]** button displays any notes that were submitted with the Qualifying Event. More notes may be added here.

Employee Qualifying Events Approval						
Employee Number	Employee Name	Event	Effective Date	Status	Profile Confirmation Number	Dependent Confirmation Number
SS-WK-SAL46	Elizabeth Rivers	Marriage - Qual Event	09/20/2010	Submitted	265	
SS-WK-SAL40	Hazel Patton	Marriage - Qual Event	10/21/2010	Submitted	281	276

Attachment

File Name	Upload Date	Note	Action
TestDoc.doc	11/04/2010		

Review Profile Change    Review Dependent Change    Notes    Attachments    Ap

Event: Marriage - Qual Event

Event Description: Marriage - Qualifying Event.

The **[Attachments]** button displays any attachments that were submitted with the Qualifying Event.

## Welcome to CMIC Open Enrollment

Open Enrollment for Marriage - Qual Event is **10/21/2010** through **12/25/2010**.  
During this period, you have the opportunity to make your **2010** benefit elections.

Hazel Patton Enrollment					
Status	Start Date	End Date	Days Left	Description	Action
Pending	2010-10-21	2010-12-25	51	Marriage - Qual Event	Enroll Now
Approved	2010-08-01	2010-12-31	57	General	
Pending	2011-01-01	2011-02-01	89	General	

Enrollment Links  
Add Dependent

Qualifying Event  
Report/Review Qualifying Event  
Dependent Enrollment

Current Cost  
Employee Amount           \$107.69      Employer Amount           \$353.84      Total Cost           \$246.15

Press the **[Approve]** button to approve. When the request is approved, the Qualifying Event will appear in the Welcome to CMIC Open Enrollment screen if the period range is current.

Press the **[Reject]** button to reject the request. When the request is rejected, the record is removed from the Approval screen and the employee will have to make the necessary changes and re-submit.

An email notification is sent to the employee's email address as specified on the Employee Profile when the request is approved or rejected.

## Dependent Approval – Screen

**Select Employees**

Employee Number       Name       Search  Show Advanced Search  Clear

---

Employee No SS-WK-HR20      Employee Name Cameron Mason

---

Show Note    Approve    Reject

**Dependent Enrollment**

Expand All

First Name	Last Name	Relation	Date of Birth								
Mason	Richard	Child	2000-06-05								
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Description</th> <th>Plan</th> <th>Effective Date</th> <th></th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Dental</td> <td>BCBS</td> <td>2008-06-20</td> <td><a href="#">View Coverage</a></td> </tr> </tbody> </table>				Description	Plan	Effective Date		<input checked="" type="checkbox"/> Dental	BCBS	2008-06-20	<a href="#">View Coverage</a>
Description	Plan	Effective Date									
<input checked="" type="checkbox"/> Dental	BCBS	2008-06-20	<a href="#">View Coverage</a>								
Mason	Myrna	Child	2002-06-02								
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Description</th> <th>Plan</th> <th>Effective Date</th> <th></th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Dental</td> <td>BCBS</td> <td>2008-06-20</td> <td><a href="#">View Coverage</a></td> </tr> </tbody> </table>				Description	Plan	Effective Date		<input checked="" type="checkbox"/> Dental	BCBS	2008-06-20	<a href="#">View Coverage</a>
Description	Plan	Effective Date									
<input checked="" type="checkbox"/> Dental	BCBS	2008-06-20	<a href="#">View Coverage</a>								

Dependent requests that have been submitted will be displayed in the Dependent Approval screen for approval.

The approver may approve or reject the dependent request by pressing the **[Approve]** or **[Reject]** button. Dependents are also updated in HR (i.e. Employee Relatives).

An email notification is sent to the employee's email address as specified on the Employee Profile when the request is approved or rejected.

## Self Service Control Setup – Screen

**Employee Self-Service Setup**

Profile	<input checked="" type="checkbox"/> Enable Workflow	
W4	<input checked="" type="checkbox"/> Enable Workflow	
Contact	<input checked="" type="checkbox"/> Enable Workflow	
Skills	<input checked="" type="checkbox"/> Auto Approval	<input type="checkbox"/> Enable Workflow
Certificate/License	<input checked="" type="checkbox"/> Auto Approval	<input type="checkbox"/> Enable Workflow
Education	<input checked="" type="checkbox"/> Auto Approval	<input type="checkbox"/> Enable Workflow
Membership	<input checked="" type="checkbox"/> Auto Approval	<input type="checkbox"/> Enable Workflow

This screen is used to enable/disable Approval Workflows for changes to an Employee’s Personal Information, and to set whether or not changes to an Employee’s Skills, Certificate/License, Education, and Membership information are to be automatically approved (Employee’s Profile gets updated without approvals)

Employee Profile records will be updated once the requests are approved and the request will be displayed in the Auto Approved Request List screen with a Submit Status of “A”. If the request has been submitted, but not automatically approved, it will appear in the Auto Approved Request List screen with a Submit Status of “S”.

## Open Enrollment Status – Log

Transaction No	Employee No	Name	Status	Start Date	End Date	Description	Remaining Days	Effective Date	Qualifying Event
1723	LG1-BW-HR5	Jane Austin	Approved	01/01/2013	12/31/2013	General	-1126	01/01/2013	
1762	TESTESS	Test Ess	Pending	01/01/2013	12/31/2013	General	-1126	01/01/2013	
1763	SWC-WK-SAL3	Suzette Watson	Approved	01/01/2013	12/31/2013	General	-1126	01/01/2013	
1783	LG1-BW-SAL23	Steve Nash	Pending	01/01/2013	12/31/2013	General	-1126	01/01/2013	
1811	LG1-BW-SAL12	Grace Kelly	Approved	01/01/2013	12/31/2013	General	-1126	01/01/2013	
1925	JCR TEST SAL	Test Salaried	Pending	01/01/2013	12/31/2013	General	-1126	01/01/2013	
1929	LG1-BW-HR25	Luis Carol	Pending	01/01/2013	12/31/2013	General	-1126	01/01/2013	
2233	GL-WK-SAL1	Donnie Warlberg	Approved	01/01/2013	12/31/2013	General	-1126	01/01/2013	
2235	GL-WK-SAL1	Donnie Warlberg	Approved	11/18/2013	08/13/2016	Child Birth	-170	11/18/2013	Child Birth
2308	GL-NEW2-SAL1	Barbara Scott	Pending	01/01/2013	12/31/2013	General	-1126	01/01/2013	
2662	GL-BW-SAL42	SAL42 GL-BW	Pending	01/01/2012	12/31/2014	General	-761	05/01/2014	
2944	GL-WK-SAL123	GL-WK SAL23	Rejected	01/01/2012	12/31/2014	General	-761	05/01/2014	
<b>Total (12 rows)</b>									

The Open Enrollment Status log lists every request transaction related to benefit/deduction elections for employees, whether they are ‘general’ requests, or Qualifying Event requests. These transactions may be Pending, Submitted or Approved.

# Qualifying Event Status – Log

Employee Self Service												
Qualifying Event												
Event No	Employee No	Name	Event Code	Event Name	Event Date	Event Status Code	Event Status Description	OE Start Date	OE End Date	OE Status	OE Remaining Days	OE Status Description
113	LG1-BW-SAL12	Grace Kelly	MARRIAGE	Marriage	03/20/2013	A	Approved	03/01/2013	11/25/2015		-432	
113	LG1-BW-SAL12	Grace Kelly	MARRIAGE	Marriage	03/20/2013	A	Approved	03/01/2013	11/25/2015		-432	
113	LG1-BW-SAL12	Grace Kelly	MARRIAGE	Marriage	03/20/2013	A	Approved	03/01/2013	11/25/2015		-432	
113	LG1-BW-SAL12	Grace Kelly	MARRIAGE	Marriage	03/20/2013	A	Approved	03/20/2013	12/14/2015		-413	
114	LG1-BW-SAL12	Grace Kelly	BIRHT	Child Birth	03/20/2013	A	Approved	03/20/2013	12/14/2015		-413	
119	LG1-BW-HR25	Luis Carol	BIRHT	Child Birth	05/23/2013	A	Approved	05/23/2013	02/16/2016		-349	
127	GL-WK-SAL1	Donnie Warberg	BIRHT	Child Birth	11/18/2013	A	Approved	11/18/2013	08/13/2016	A	-170	Approved
138	LG1-BW-HR5	Jane Austin	BIRHT	Child Birth	12/20/2013	A	Approved	12/20/2013	09/14/2016		-138	
141	LG1-BW-HR5	Jane Austin	MARRIAGE	Marriage	12/19/2013	A	Approved	12/19/2013	09/13/2016		-139	
146	LG1-BW-HR5	Jane Austin	BIRHT	Child Birth	05/01/2014	A	Approved	05/01/2014	01/24/2017		-6	
149	LG1-BW-HR5	Jane Austin	BIRHT	Child Birth	06/01/2014	A	Approved	06/01/2014	02/24/2017		25	
159	LG1-BW-HR5	Jane Austin	BIRHT	Child Birth	06/03/2014	S	Submitted					
<b>Total (12 rows)</b>												

This log screen lists basic details about Qualifying Events, such as their status.

# Dependent Enrollment Approval – Screen

This screen allows to Approve or Reject Benefit/Deduction elections for employee's dependents.

If the request is approved, the benefits/deductions will be elected for the employee's dependent and HR/Payroll will be updated. The Election By Employee and Election by Plans screens in HR should be updated, and the Employee Benefits Maintenance and Employee Deductions Maintenance screens in Payroll should be updated. If the request is rejected, it is removed from the Open Enrollment Approval screen and the employee will have to make more changes in Open Enrollment and then re-submit.

An email notification is sent to the employee's email address as specified on the Employee Profile when the request is approved or rejected.

# Employee Address Change – Log

Employee Self Service												
Employee Address Change												
Employee #	First Name	Last Name	City Code	City Name	Prev City Code	Prev City Name	State Code	State Name	Prev State Code	Prev State Name	Work Local	
CCQ-WK-HR1	Tony	Gabies					NL	Newfoundland and Labrador	NL	Newfoundland and Labrador	QC	
CCQ-WK-HR1	Tony	Gabies					NL	Newfoundland and Labrador	NL	Newfoundland and Labrador	NF	
CCQ-WK-SAL1	Jenny	Aniston					ON	Ontario	QC	Quebec	QC	
CLEVELANDEMP	Employee	Cleveland					OH	Ohio	OH	Ohio	CLEV1	
DMCLEAN	Dallas	McLean					PA	Pennsylvania	PA	Pennsylvania	SNY	
EMP-04	04	EMP					NY	New York	NY	New York	NY STATE	
EMP001	EMPLOYEE1	SHAWMUT					OH	Ohio	NY	New York	COLUMBUS	
GL-BW-HR13	HR13	GL-BW					NY	New York	IL	Illinois	SNY	
GL-BW-HR18	HR18	GL-BW					IL	Illinois	IL	Illinois	IN01	
GL-BW-HR47	HR47	GL-BW					WI	Wisconsin	WI	Wisconsin	CHIC	
GL-BW-HR84	HR84	GL-BW					IL	Illinois	IL	Illinois	100013224	
GL-BW-HR84	HR84	GL-BW					IL	Illinois	IL	Illinois	CHIC	
GL-BW-SAL1	Eden	Gendel					OH	Ohio	NY	New York	LONGCODEWC	
GL-BW-SAL1	Eden	Gendel					NY	New York	NY	New York	LONGCODEWC	
GL-BW-SAL11	SAL11	GL-BW					KY	Kentucky	PA	Pennsylvania	CHIC	

This log screen lists Employee Address Change records and basic details about them.

# Security

---

## User Maintenance

For details about this screen, please refer to the System Data user guide.

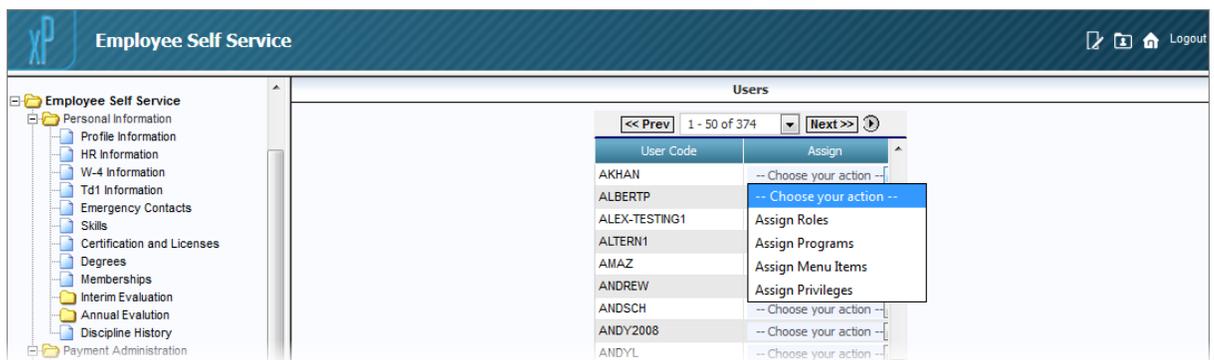
---

## Role Maintenance (JSP Security Roles)

For details about this screen, please refer to the Project Management user guide.

---

## User Access



This screen is used to assign security roles, programs, menu items and privileges to User IDs.

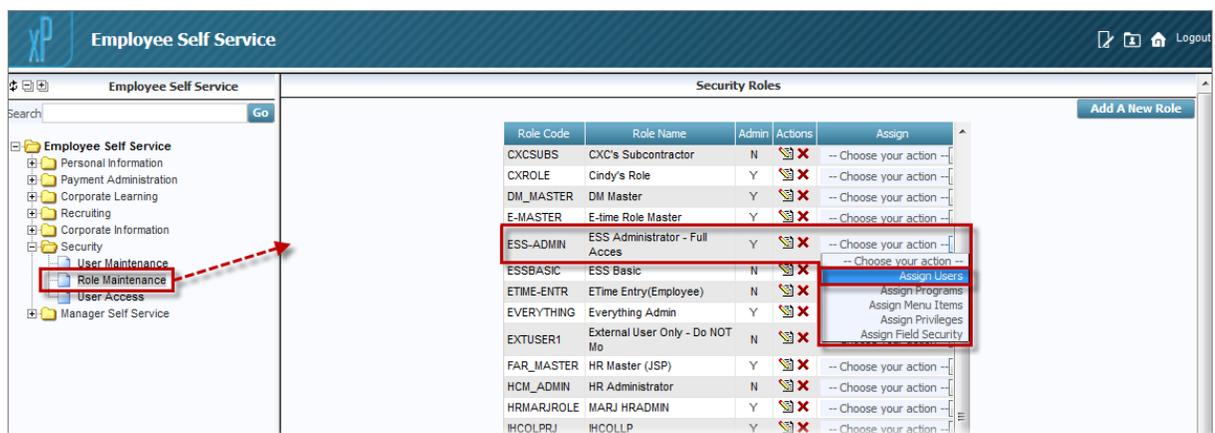


# ESS Setup

## ESS Administrator Setup

The following steps are required to set up an Enterprise User as an ESS Administrator.

### Step 1: JSP Security Role Assignment



Sample of JSP Role Maintenance screen, in PM JSP module.

JSP Security Roles are used to grant privileges for JSP based screens, such as those of the ESS module. The relevant JSP Security Roles maintenance screen is found in the ESS module, as shown above (standard Treeview path: *ESS > Security > Role Maintenance*).

For the ESS system, JSP Security Roles are used to set which of its screens are available to users assigned them, for both ESS Administrators and Employees.

For details about setting up JSP Security Roles for the ESS system, please refer to the *JSP Security Roles Setup* subsection under the *ESS Setup* section of this guide.

### Employees & JSP Role (ESSBASIC Role)

For Employees (not ESS Admins), the standard **ESSBASIC** JSP Security Role that comes with the system is used to set up which screens are available to them. This role does not need to be manually assigned to Employees, as the system automatically does that when they self-register.

### ESS Administrators & JSP Roles

For ESS Administrators, one or more new JSP Security Roles need to be created and set up for them, to set which **Manager Self Service** screens in the ESS module are to be available to them. If all administrators are to have the same privileges, then only one role needs to be created for all of them, otherwise, a roll needs to be created for each variation of ESS administration duties.

The appropriate roles are assigned to ESS Administrators manually, using the **Assign Users** action of the JSP Role Maintenance screen, as shown in the previous screenshot.

## Step 2: HR Security Role Assignment

HR Roles		
Code	Description	Delete
EMP-V	Employee (View)	X
EMP-VE	Employee (View/Edit)	X
APPR	Approver	X
LG1	Approver	X
ESS-MNGER	ESS Manager	X
FARNAZ	farnazv10x	X

Sample of HR Role Maintenance screen in HCM module; standard Treeview path: **HCM > File Maintenance > HR Role Maintenance**.

HR Security Roles (HR Roles for short) are only required for ESS Administrators, and they are used to set up Approval security for them, to set which approval operations for Change Requests (e.g. requests to change dependent information, or to change benefit/deduction plan enrollments) they can perform.

For each type of Change Request, ESS Administrators can be granted **View**, **Approve** and **Reject** privileges. For Change Requests for Profile Information, ESS Admins can be granted **Edit** privileges to change data in the Change Requests.

For details about setting up HR Security Roles, please refer to the *HR Security Roles* subsection under the *ESS Setup* section of this guide.

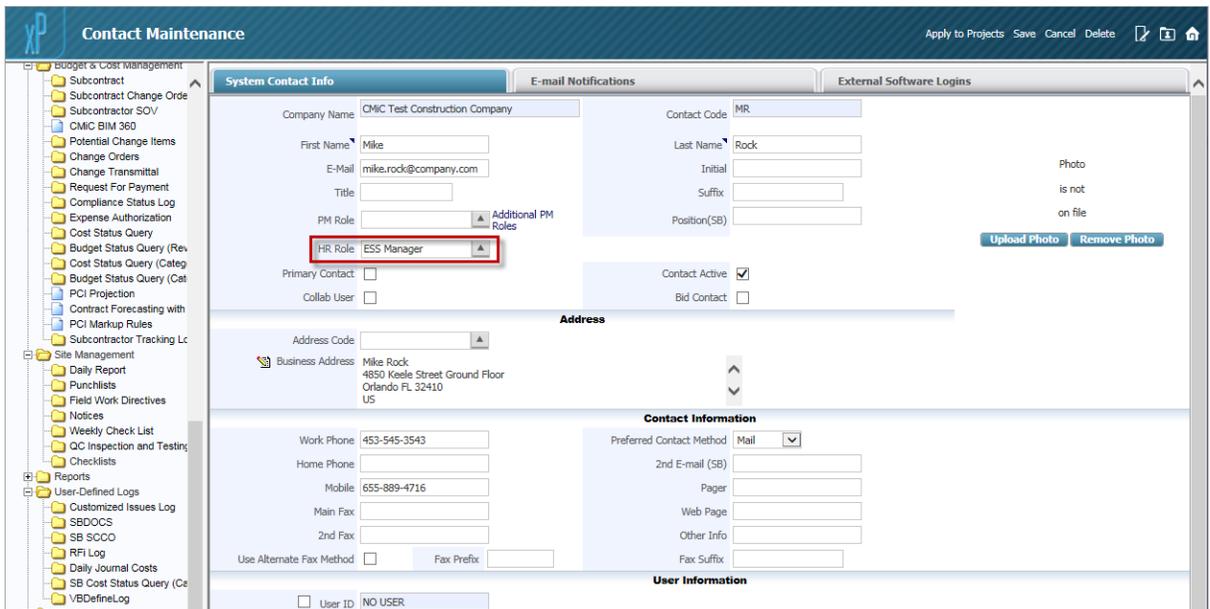


Sample of Partners screen in PM JSP module.

HR Roles are assigned to ESS Administrators via their Contact records. To assign an HR Role to a Contact record, the Partners screen in the PM JSP module must be used (shown above), as only it has the **HR Role** field required to assign an HR Role to a Contact, as shown in the next screenshot.

In the Partners screen, use the screen's filter, framed above, to search for the Company to which the administrator-to-be belongs, then click the link under the **Name** column to view that Company's Contact records.

Next, search for the administrator-to-be, and click the Edit icon under the **Action** column. Next, select the relevant HR Role via the **HR Role** field on the **System Contact Info** tab, as shown below.



### Step 3: Grant Access to ESS

The way in which ESS Administrators and Employees are granted access to the ESS system is the same. For details, please refer to the *Step 1: Grant Access to ESS* subsection under the *ESS Employee Setup* section.

## Step 4: ESS Self-Registration

---

The way in which ESS Administrators and Employees self-register is the same. For details, please refer to the *Step 2: ESS Self-Registration* subsection under the *ESS Employee Setup* section.

---

## ESS Employee Setup

For Employees, the first two steps involved to set up ESS Administrators are not required. The first step is not required, as the JSP Security Role relevant to Employees (**ESSBASIC**) is automatically assigned to them when they self-register. The second step is also not required, as HR Security Roles are only relevant to ESS Administrators.

### **ESSBASIC – JSP Security Role for Employees**

---

For Employees, the standard **ESSBASIC** JSP Security Role that comes with the system is used to set up which screens are available to them. This role needs to be configured, however, it does not need to be manually assigned to users, as the system automatically does that when Employees self-register.

For details about setting up JSP Security Roles for the ESS system, please refer to the *JSP Security Roles Setup* subsection.

# Step 1: Grant Access to ESS

## Part I: Ensure Employee Profile Has Relevant Details

The screenshot displays the 'EMPLOYEE PROFILE' interface. At the top, there's a header with 'EMPLOYEE PROFILE', 'Table Mode', 'Save', 'Exit', and help icons. Below this is the 'EMPLOYEE DETAIL' section with a search bar containing 'Employee PS4434' and 'Sandesk Padma'. A navigation bar includes tabs for 'Personal', 'Company', 'Rates/Salary', 'Address', 'Tax', 'HR Info', 'HCM', 'Exclude Other Hours', 'Security', 'Project History', and 'User Defined Fields'. The 'Personal' tab is active, showing various fields. Three fields are highlighted with red boxes: 'Employee' (PS4434), 'SSN /SIN no.' (456789123), and 'Date of Birth' (22/May/1981). Other visible fields include Last Name (Sandesk), First Name (Padma), Status (Active), Work Status (Working), FLSA Type (Non-Exempt), Hire Date (03/Jan/2017), and Primary Employee (PS4434). At the bottom, the 'Country' is set to 'US'.

Using the Employee Profile screen, on the **Personal** tab, shown above, ensure that following information is entered:

- Employee Number
- SSN/SIN
- Date of Birth

This information is required for the self-registration process.

**NOTE:** If information is missing, the Employee History screen (program: PYEMPHIST) is used to enter it.

**EMPLOYEE PROFILE** Table Mode Save Exit ? ? ?

**EMPLOYEE DETAIL**

Search Insert Delete Previous Next Workflows Report Options Import ECM Documents User Extensions

\* Employee PS4434 Sandesk Padma Copy Employee

Personal Company Rates/Salary **Address** Tax HR Info HCM Exclude Other Hours Security Project History User Defined Fields

\* Geo Code From Mailing Address

**MAILING ADDRESS** **PHYSICAL ADDRESS**

\* Foreign Address  \* Foreign Address

77 Easy St.   
 Chicago   
   
 \* Zip Code 60624   
 \* Country Code US United States of America   
 \* State/Province IL Illinois   
   
 Country/Region   
 City/Town   
 Home Phone   
 Home Fax   
 Cell Phone   
 **Email Address PS@CCC.com**   
 Pager   
 Latitude   
 Longitude   
   
 Work Phone   
 Work Fax   
 Work Cell Phone   
 Work Email Address   
 Business Partner Code   
 AP EFT Distribution Method Email   
 Create BP/Vendor

Country US

On the **Address** tab, ensure that the **Email Address** field is entered. The e-mail address will be used to send the Employee an e-mail to ask them to self-register.

## Part II: Grant ESS Access & Send Self-Registration E-Mail

**Human Capital Management** Clear Search Update

**Employee Self Service Maintenance**

Employee Number: \_\_\_\_\_ First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_  
 Employee Type: -Select- Payroll Company: \_\_\_\_\_ Payroll Department: \_\_\_\_\_  
 Pay Group: \_\_\_\_\_ Pay Run: \_\_\_\_\_ Union: \_\_\_\_\_  
 Trade: \_\_\_\_\_

Total Records - 292 << Prev 151 - 200 of 292 Next >>

Employee No	First Name	Last Name	Manager No	Manager Name	Senior Manager No	Senior Manager Name	Company Code	Company	User ID	Access To Self Service	Select All
PYMJ-WK-004	Laura H	Lopez					PYMJ	MJ PAYROLL COMPANY		<input type="checkbox"/>	
SWC-SAL1	Mona	Liza					SWC	SWC Construction Company		<input type="checkbox"/>	
CCC-WK-HR1	Isabella	Lincoln	SWC-WK-HR6	Joanna Judd	SWC-WK-SAL11	Felix Anderson	CCC	CMC Test Construction Company		<input checked="" type="checkbox"/>	
PYMJ-HR-027	David	Lee					PYMJ	MJ PAYROLL COMPANY		<input type="checkbox"/>	
SWC-WK-SAL15	George	Laker					SWC	SWC Construction Company		<input type="checkbox"/>	
JAK001	Jodi	Knickle					ZZ	CMC Construction Inc.	Not Registered	<input checked="" type="checkbox"/>	
ZZ-WK-SAL1	Daniel	King					ZZ	CMC Construction Inc.		<input type="checkbox"/>	
ZC-EMP3	Karen	Kindness					ZC	Canadian ZC Company		<input type="checkbox"/>	
CA-WK-KILBY	Bob	Kilby					ALCAD	AL Canadian Company		<input type="checkbox"/>	
SWC-WK-HR12	Marie	Kendle					SWC	SWC Construction Company		<input type="checkbox"/>	
SWC-WK-HR6	Josna	Judd	SWC-WK-SAL11	Felix Anderson	SWC-WK-SAL3	Suzette Watson	SWC	SWC Construction Company		<input type="checkbox"/>	
ZZ-JOHNJOYCE	John	Joyce					ZZ	CMC Construction Inc.	Not Registered	<input checked="" type="checkbox"/>	
PYMJ-WK-10	Mirz H	Josh					PYMJ	MJ PAYROLL COMPANY		<input type="checkbox"/>	
SWC-WK-HR16	Sarah	Jones					SWC	SWC Construction Company		<input type="checkbox"/>	
SWC-WK-HR23	Glovkey	Jonathan					SWC	SWC Construction Company		<input type="checkbox"/>	
QA-WK-HR1	Abraham	Jonathan					SWC	SWC Construction Company		<input type="checkbox"/>	
CCC-WK-HR3	Abraham	John					CCC	CMC Test Construction Company		<input type="checkbox"/>	
ALT-WK-JESSUP	Dave	Jessup					ALT	Andy's Company ALT		<input type="checkbox"/>	
22256	Brenda	Jason					PYMJ	MJ PAYROLL COMPANY	Not Registered	<input checked="" type="checkbox"/>	
SWK-WK-HR21	Melinda	Jackson					SWC	SWC Construction Company	Not Registered	<input checked="" type="checkbox"/>	
SWC-WK-HR44	Tom	Jackson					SWC	SWC Construction Company		<input type="checkbox"/>	
JD-SAL-INGER	SAL	INGER					JDUS	JD US TEST Company	Not Registered	<input checked="" type="checkbox"/>	

Sample of Employee Self Service Maintenance screen in Human Capital Management module

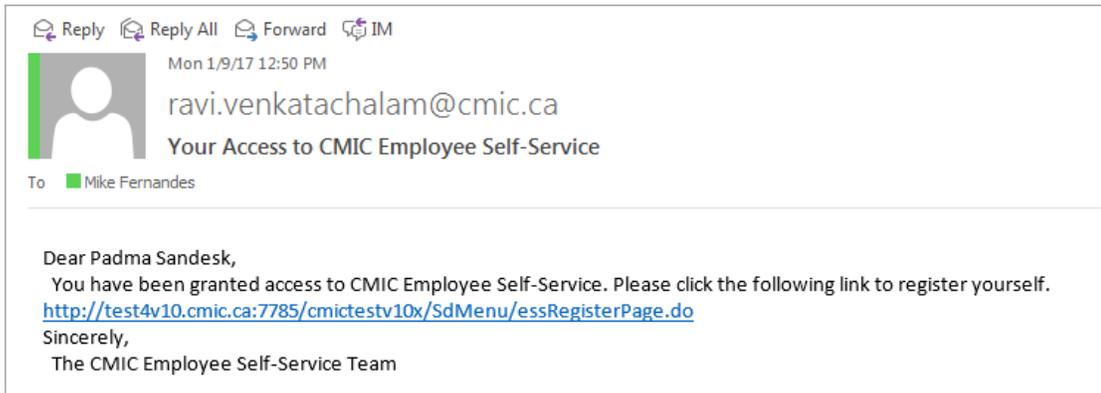
In the HCM module, launch the Employee Self Service Maintenance screen, shown above, via the **Employee Maintenance** link in the HCM module's Treeview. For details about launching the HCM module, please refer to the *Launching HCM Module* subsection under the *Appendix* of this user guide.

In the Employee Self Service Maintenance screen, search for the Employee, click their **Access To Self Service** checkbox, then click the **[Update]** button on the top-right of the screen.

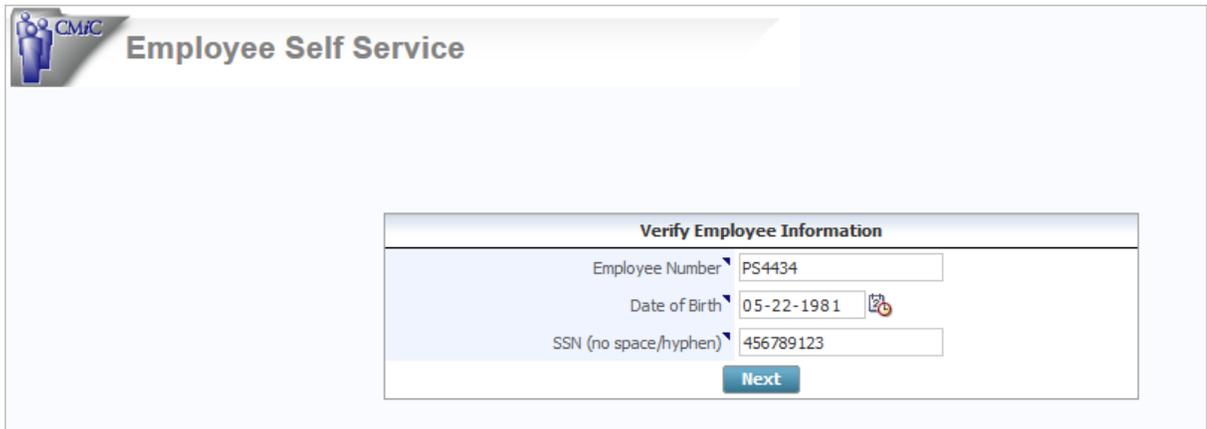
Note that rows of Employees granted access to the ESS module have a purple-blue background.

After clicking the **[Update]** button, an e-mail will be sent to the Employee, asking him/her to register for the Employee Self Service system.

## Step 2: ESS Self-Registration

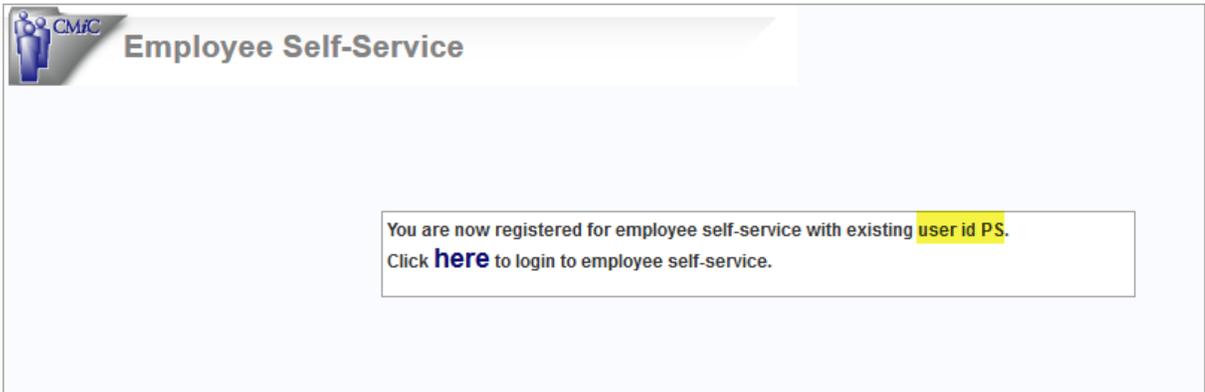


After an Employee is granted access to the ESS system, an e-mail is sent to them, as shown above, asking them to click the provided link to register for the ESS system.



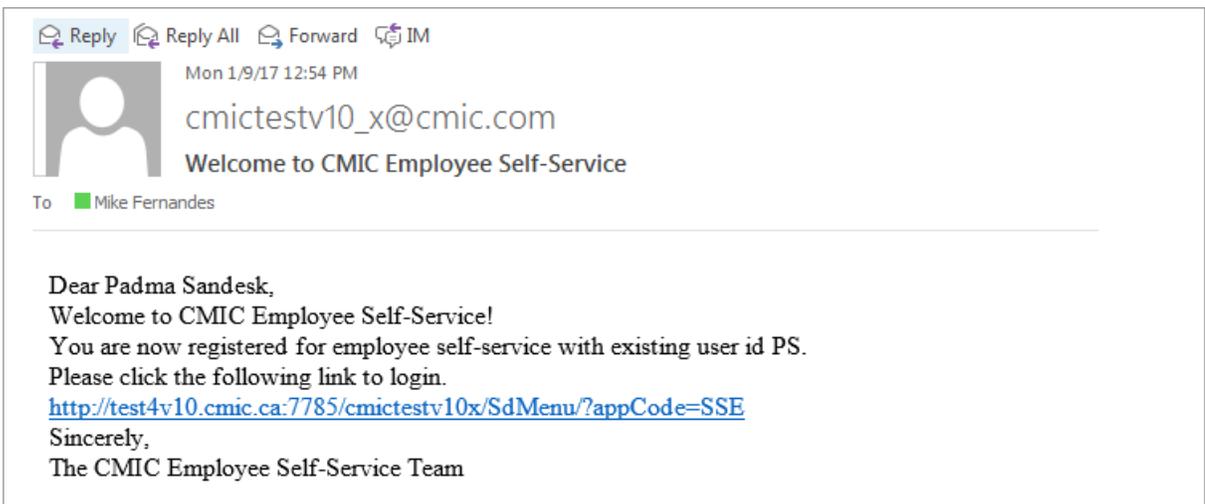
Clicking the provided link launches the following ESS verification screen via the user's default browser. To register for the ESS system, the user enters their **Employee Number**, **Date of Birth** and **SSN** number, and clicks the **[Next]** button.

**NOTE:** If you are testing this functionality, after you granted access to the ESS system for an Employee, to test the Employee's registration, you must clear your browser's cache. This is necessary since your login credentials are saved by your browser, and they will be automatically used by the ESS Sing-In screen.

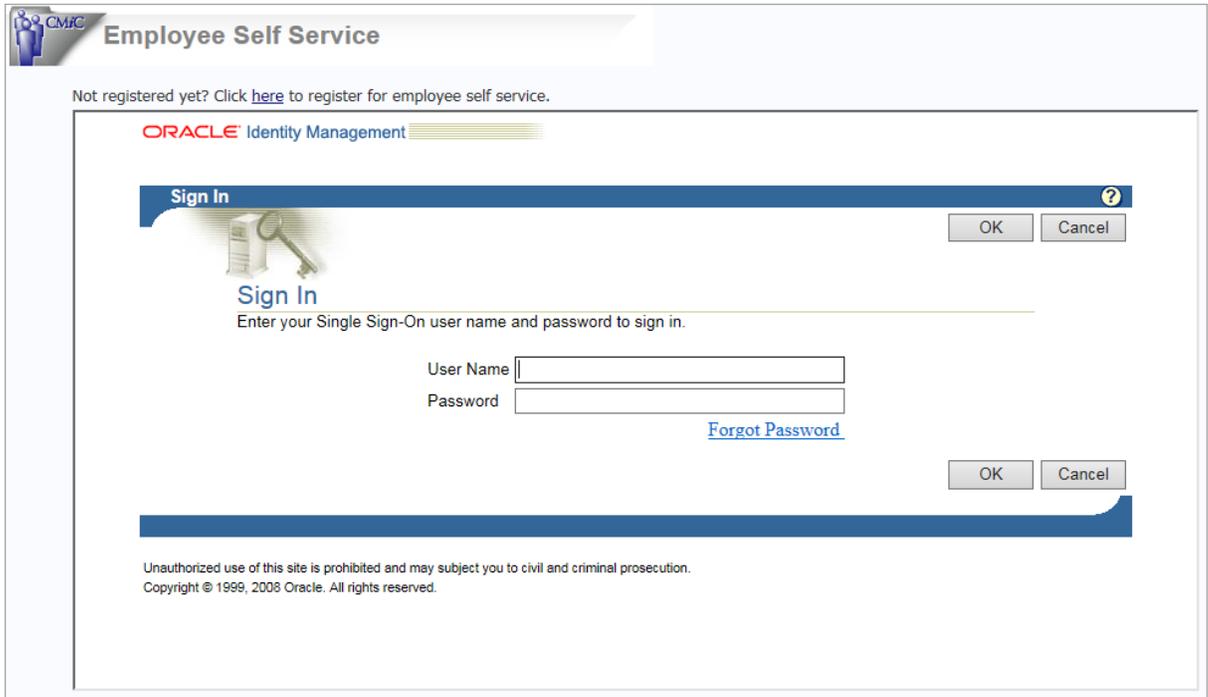


After clicking [Next], the following message is displayed, telling the Employee that they are registered for Employee Self Service. The message also contains their existing Enterprise User ID, which is used to log into the ESS system, along with their existing password for Enterprise.

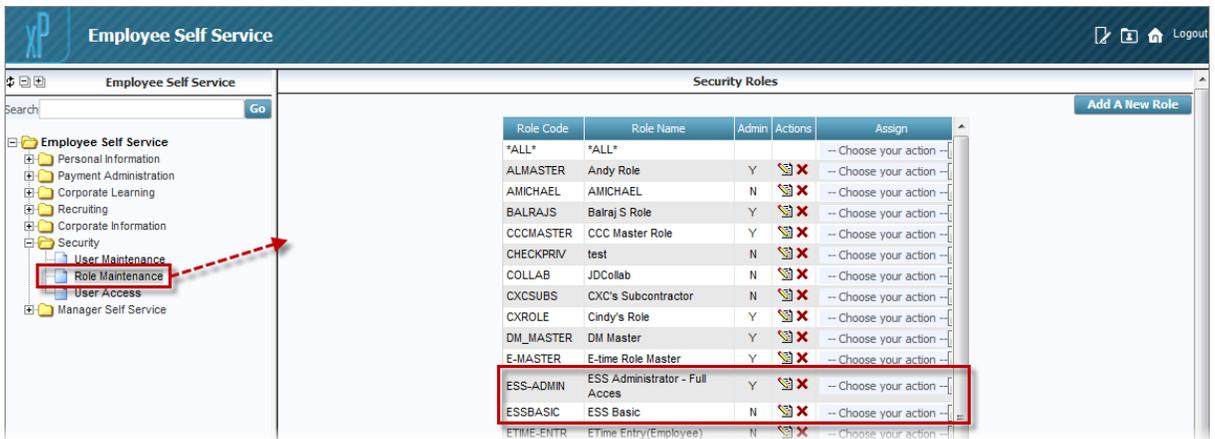
Also, an e-mail will be sent to them, providing a URL link to the ESS Sign In screen, as shown below. The provided URL can be added to the user's browser's Favorites/Bookmarks for easy access.



Clicking the URL launches the following ESS Sign-In screen:



## JSP Security Roles Setup



Sample of JSP Role Maintenance screen in ESS module, which is the only JSP Role Maintenance screen with settings relevant to the ESS module (i.e., JSP Role Maintenance screens in other JSP modules cannot be used).

JSP Security Roles are used to grant privileges for JSP based screens. For the ESS module, which is JSP based, JSP Security Roles are used to set which screens are available to users, for both ESS Administrators and Employees.

In the JSP Security Roles screen of the ESS module, the **Assign Menu Items** action, framed below, is used to set which screens are available to ESS users:

DM_MASTER	DM Master	Y			-- Choose your action --
E-MASTER	E-time Role Master	Y			-- Choose your action --
ESS-ADMIN	ESS Administrator - Full Acces	Y			-- Choose your action --
ESSBASIC	ESS Basic	N			-- Choose your action --
ETIME-ENTR	ETime Entry(Employee)	N			Assign Users
EVERYTHING	Everything Admin	Y			Assign Programs
EXTUSER1	External User Only - Do NOT Mo	N			<b>Assign Menu Items</b>
FAR_MASTER	HR Master (JSP)	Y			Assign Privileges
HCM_ADMIN	HR Administrator	N			Assign Field Security
HRMARJROLE	MARJ HRADMIN	Y			-- Choose your action --

To set up JSP Security Roles for the ESS module, the JSP Security Roles maintenance screen in the ESS module must be used, as only it has settings for the ESS module.

For Employees, the standard **ESSBASIC** Security Role that comes with the system is used to set up which screens are available to them. And when an Employee self-registers for the ESS module, the **ESSBASIC** role is automatically assigned to the Employee.

For ESS Administrators, one or more new JSP Security Roles need to be created and set up for them, to set which **Manager Self Service** screens in the ESS module are to be available to them. If all administrators are to have the same privileges, only one role needs to be created for them all, otherwise, a role will need to be created for each variation of privileges.

# Assign Menu Items

The screenshot displays the 'Employee Self Service' interface with the 'Assign Programs' sub-screen. The left pane shows a hierarchical tree of menu items, and the right pane shows a table of these items with checkboxes for assignment. A callout box labeled 'relevant to ESS Administrators only' points to the 'Granted' checkboxes for 'Manager Self Service' and 'Security'.

Menu Item	Granted
Personal Information	<input checked="" type="checkbox"/>
Profile Information	<input checked="" type="checkbox"/>
HR Information	<input checked="" type="checkbox"/>
W-4 Information	<input checked="" type="checkbox"/>
Td1 Information	<input checked="" type="checkbox"/>
Emergency Contacts	<input checked="" type="checkbox"/>
Skills	<input checked="" type="checkbox"/>
Certification and Licenses	<input checked="" type="checkbox"/>
Degrees	<input checked="" type="checkbox"/>
Memberships	<input checked="" type="checkbox"/>
Interim Evaluation	<input checked="" type="checkbox"/>
Annual Evaluation	<input checked="" type="checkbox"/>
Discipline History	<input checked="" type="checkbox"/>
Payment Administration	<input checked="" type="checkbox"/>
Open Enrollment	<input checked="" type="checkbox"/>
Request and Review Vacation Balance	<input checked="" type="checkbox"/>
Pay Stub Printing	<input checked="" type="checkbox"/>
Direct Deposit Accounts	<input checked="" type="checkbox"/>
Year End Summary	<input checked="" type="checkbox"/>
Corporate Learning	<input checked="" type="checkbox"/>
Class Enrollment	<input checked="" type="checkbox"/>
Training Nomination	<input checked="" type="checkbox"/>
Training Request	<input checked="" type="checkbox"/>
Recruiting	<input checked="" type="checkbox"/>
Enter Requisition	<input checked="" type="checkbox"/>
Review Requisition Activity	<input checked="" type="checkbox"/>
Review Applicants	<input checked="" type="checkbox"/>
Applicant Self Service	<input checked="" type="checkbox"/>
Corporate Information	<input checked="" type="checkbox"/>
Forms Request	<input checked="" type="checkbox"/>
Security	<input checked="" type="checkbox"/>
User Maintenance	<input checked="" type="checkbox"/>
Role Maintenance	<input checked="" type="checkbox"/>
User Access	<input checked="" type="checkbox"/>
Manager Self Service	<input type="checkbox"/>
Request Approval	<input type="checkbox"/>
Auto Approved Request List	<input type="checkbox"/>
Manager Change Request	<input type="checkbox"/>

Shown above is a sample of the **Assign Programs** sub-screen. The screen has checkboxes for each screen in the ESS module, to set which screens are available to users assigned the JSP Security Role.

# HR Security Roles Setup



Sample of HR Role Maintenance screen; standard Treeview path: **HCM > File Maintenance > HR Role Maintenance**.

## Overview – HR Security Roles Setup

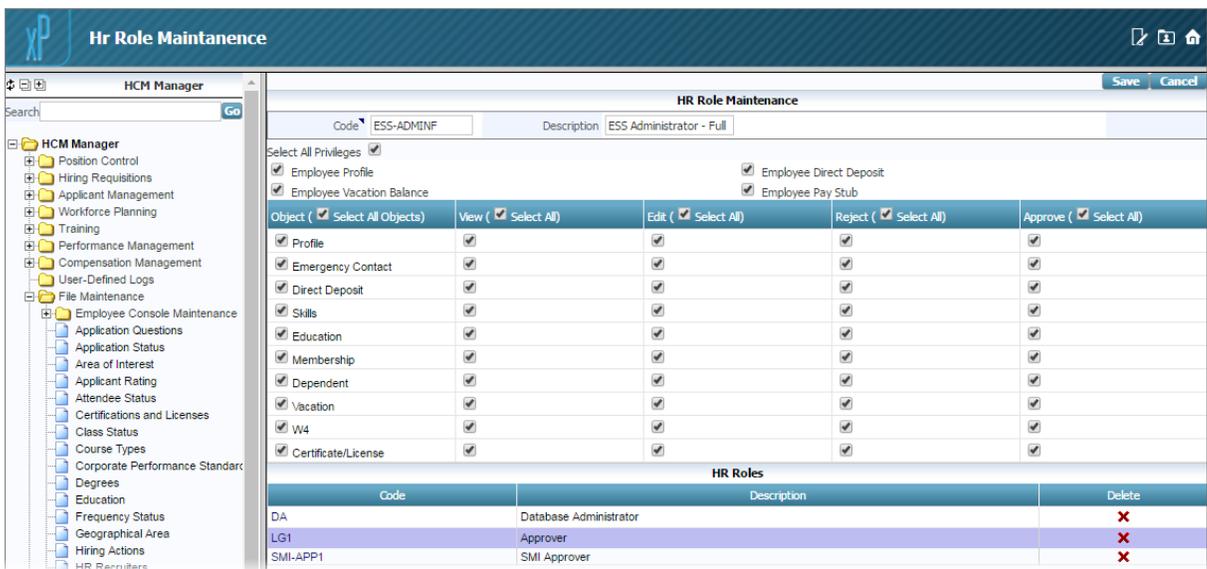
HR Security Roles (HR Roles for short) are created and used to grant approval privileges for ESS Administrators, to set what Change Requests (e.g. requests to change dependent information, or benefit/deduction enrollments) ESS Administrators are allowed to approve.

HR Roles are assigned to ESS Administrators via their Contact records, using the Partners screen in the PM JSP module (Partners screen must be used, as only it has the **HR Role** field required to assign an HR Role to a Contact record). For details, refer to the following subsection: *Step 1: HR Security Role Assignment*.

## Create HR Security Role for ESS Administrators

To create an HR Security Role for ESS Administrators, click the **[Add]** button on the HR Roles Maintenance screen, framed in the previous screenshot.

In the next screen, shown below, use the **Code** field to enter a code for the HR Role, and the **Description** field to enter its description:



Next, check the employee information for which the ESS Administrators assigned this HR Role will be able to perform approval operations. Click [Save] when finished.

---

**NOTE:** Currently the **Employee Profile**, **Employee Vacation Balance**, **Employee Direct Deposit**, and **Employee Pay Stub** checkboxes along the top of the screen are not used.

---

## Employee Self-Service Control



Sample of Employee Self-Service Control screen; standard Treeview path: **HCM > File Maintenance > Employee Self-Service Control**.

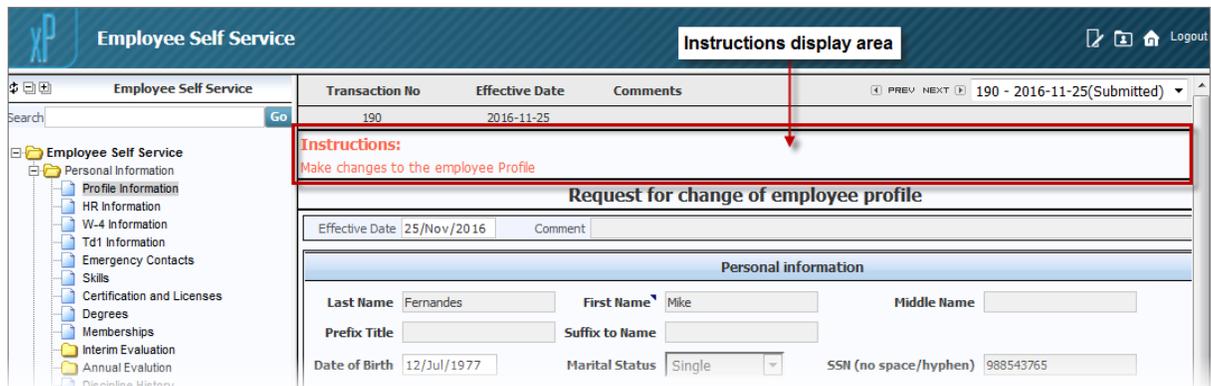
This screen is used to enable/disable Approval Workflows for changes to an Employee's Personal Information, and to set whether or not changes to an Employee's Skills, Certificate/License, Education, and Membership information are to be automatically approved (Employee's Profile gets updated without approvals).

---

**NOTE:** These settings are also available in the Self Service Control Setup screen of the ESS system (**ESS > Manager Self Service > Self Service Control Setup**).

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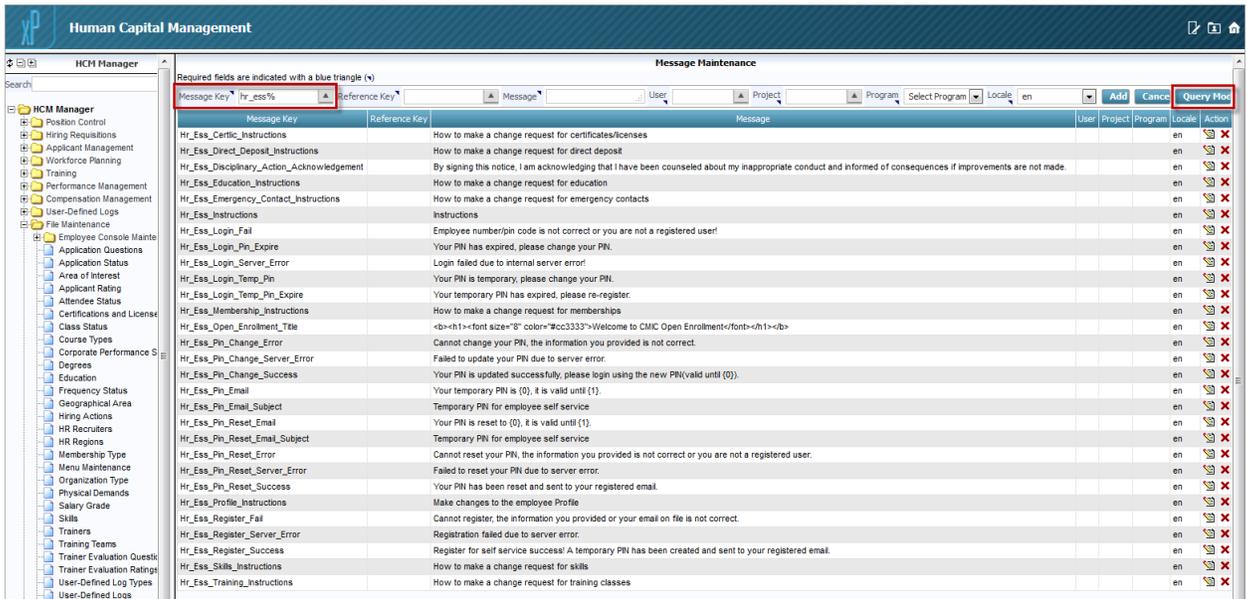
## Instructions Maintenance (Prompt Maintenance)



Sample of Instructions display area at top of ESS screens.

The instructions displayed in the Instructions (prompts) area of ESS screens, shown above, can be customized.

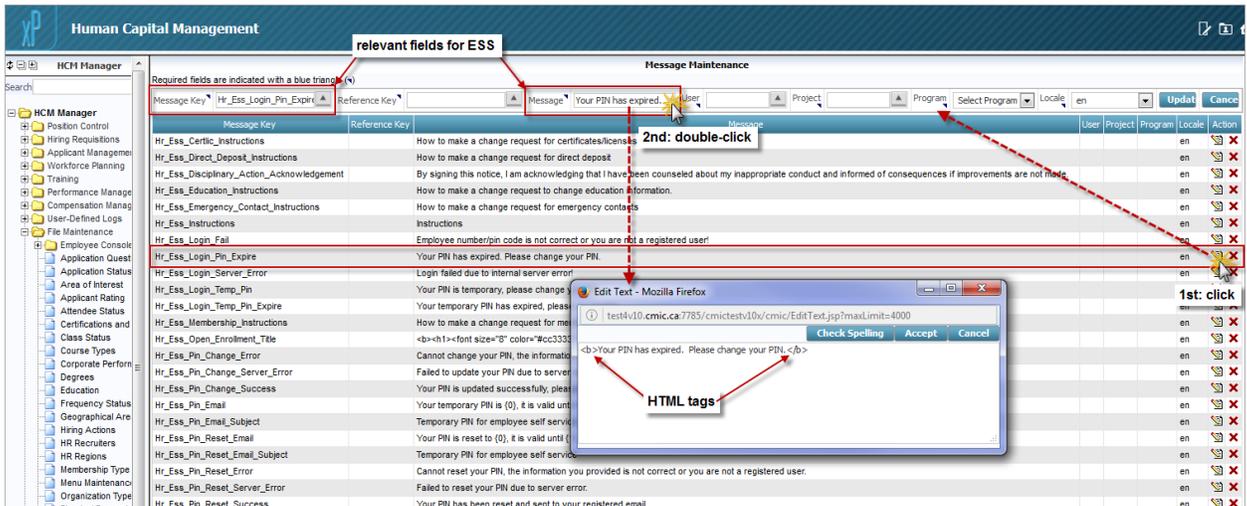
To customize the Instructions, use the Prompt Maintenance screen in the HCM module (standard Treeview path: **HCM > File Maintenance > Prompt Maintenance**).



Sample of Prompt Maintenance screen.

To list the prompts relevant to the ESS system in the Prompt Maintenance screen, click the **[Query Mode]** button on the top-right of the screen, enter **“hr\_ess%”** (without quotes) in the **Message Key** field, then click the **[Execute Query]** button, which was the **[Query Mode]** button when the screen was not in Query Mode.

To edit a prompt, click its corresponding Edit icon under the **Action** column, then double-click the **Message** field to bring up an editor popup, as shown below:



Use the editor to change the prompt, and click **[Accept]** when finished. Note that prompts can be formatted using HTML. On the main screen, click the **[Update]** button to save the changes.

In the Prompt Maintenance screen, the only fields that are relevant to the ESS module are: **Message key**, and **Message**. The other fields are used by the PM JSP module.

# Appendix

## Launching HCM Module

There are two main ways in which the HCM module can be launched.

### Method 1: CMiC Launch Page

The **HR Self-Service** option under the **Software V10** section of the CMiC launch page, as shown below, can be used to launch the HCM module.

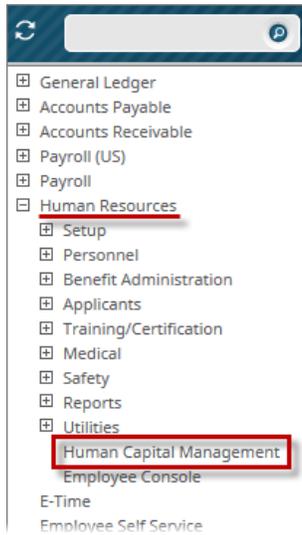
The screenshot displays the CMiC launch page interface. At the top left is the CMiC logo. Below it, the page is divided into two main sections: 'DEVELOPMENT TOOLS' and 'SOFTWARE V10'. Each section has a 'CHOOSE A TOOL:' or 'CHOOSE AN ENVIRONMENT:' dropdown menu. Under 'SOFTWARE V10', there is a 'CHOOSE A PRODUCT:' dropdown menu. The 'HR Self-Service' option is highlighted with a red box. At the bottom right, there is a 'Logout' link.

DEVELOPMENT TOOLS		SOFTWARE V10	
<b>CHOOSE A TOOL:</b>	<b>CHOOSE AN ENVIRONMENT:</b>	<b>CHOOSE A PRODUCT:</b>	<b>CHOOSE AN ENVIRONMENT:</b>
<ul style="list-style-type: none"><li>• Treeview Builder</li><li>• Query Builder</li><li>• Process Builder</li><li>• Workflow Monitor</li><li>• Form Letter Definition</li><li>• Jasper Server / Analytics</li><li>• Program Builder</li><li>• Simple Menu</li><li>• Report Parameters</li><li>• Oracle Report Queue</li><li>• Server Logs</li><li>• Latest Server Log</li></ul>	<ul style="list-style-type: none"><li>• testv10x</li><li>• pretestv10x</li></ul>	<ul style="list-style-type: none"><li>• Enterprise Console</li><li>• Enterprise Classic</li><li>• Classic without treeview</li><li>• Project Management</li><li>• Timesheet Entry</li><li>• <b>HR Self-Service</b></li><li>• Opportunity Management</li><li>• Subcontractor Prequalification</li></ul>	<ul style="list-style-type: none"><li>• testv10x</li><li>• pretestv10x</li></ul>
<a href="#">RUN DevTools »</a>		<a href="#">RUN Software »</a>	
<a href="#">Logout</a>			

## Method 2: Default Forms Treeview

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The **Human Capital Management** link in the default Forms Treeview (Menu Type: **v10 Menu**, Menu Description: **v10 Menu Default Menu**) can also be used to launch the HCM module.



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