



**HARRIS**

# Employee Self Service (ESS)

Version 2.21

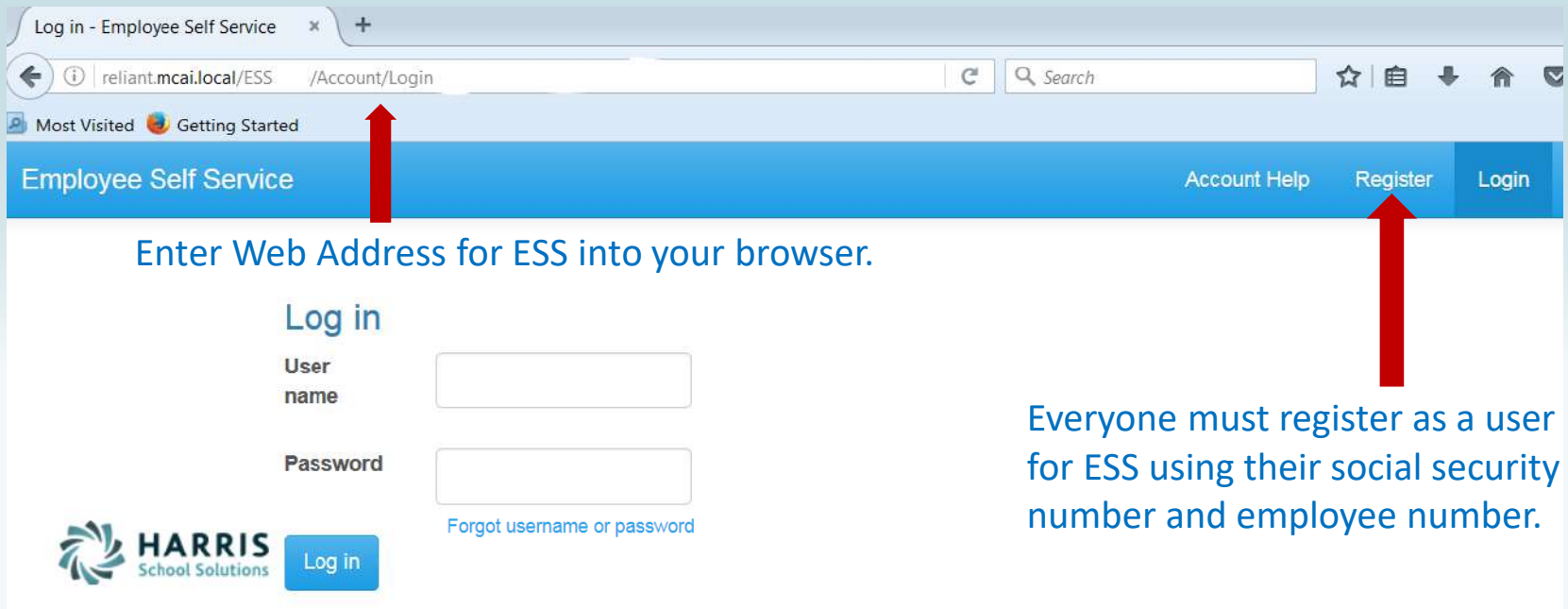
# *Employee Self Service*

Employees can...

- access from any computer.
- view their elected withholding, earnings summary, check history, company documents, leave balances and leave history.
- request changes to their demographics, direct deposits, W4 and state tax withholding forms.
- upload documents for demographic and direct deposit request.
- print past check information.
- print W2s for past years.

# Employee Self Service – Register

## Registration on Log In screen



The screenshot shows a web browser window with the URL `reliant.mcai.local/ESS/Account/Login`. The page header includes "Employee Self Service" on the left and "Account Help", "Register", and "Login" on the right. A red arrow points from the "Register" link to the text "Everyone must register as a user for ESS using their social security number and employee number." Another red arrow points from the "Register" link to the text "Enter Web Address for ESS into your browser." The login form contains fields for "User name" and "Password", a "Log in" button, and a "Forgot username or password" link. The Harris School Solutions logo is in the bottom left corner.


Enter Web Address for ESS into your browser.

Log in

User name

Password

[Forgot username or password](#)

 [Log in](#)

[Account Help](#) [Register](#) [Login](#)

Everyone must register as a user for ESS using their social security number and employee number.

**NOTE: Internet Explorer version 9 and below are not supported in ESS. The Internet Explorer browser must be version 10 or above.**

# Employee Self Service - Register

All employees must create an account in ESS.

ESS

## Create a New Account

Use the form below to create a new account.

Passwords are required to be a minimum of 6 characters in length.

**User name**

**Email**

**First Name**

**Last Name**

**Social Security Number**

**Employee Number**

**Password**

**Confirm password**

**Message**

Thank you for registering. An email has been sent to [redacted]. Please check your email and use the enclosed link to finish registration. If you do not receive an email to confirm your account please contact your System Administrator.

Employee chooses their own User Name and Password. User name should not contain any special characters or spaces.

Social Security Number and Employee Number combination is validated in the payroll system.

Email address will be used to send all notifications from ESS. This does NOT have to be a school district assigned email address. It may be an employee's personal email address.

**Your Employee Self Service account confirmation**

me@me.com

Sent: Fri 5/16/2014 9:50 AM

To: Angela Palmire

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Thank you for signing up with us! Please confirm your registration by clicking the following link:

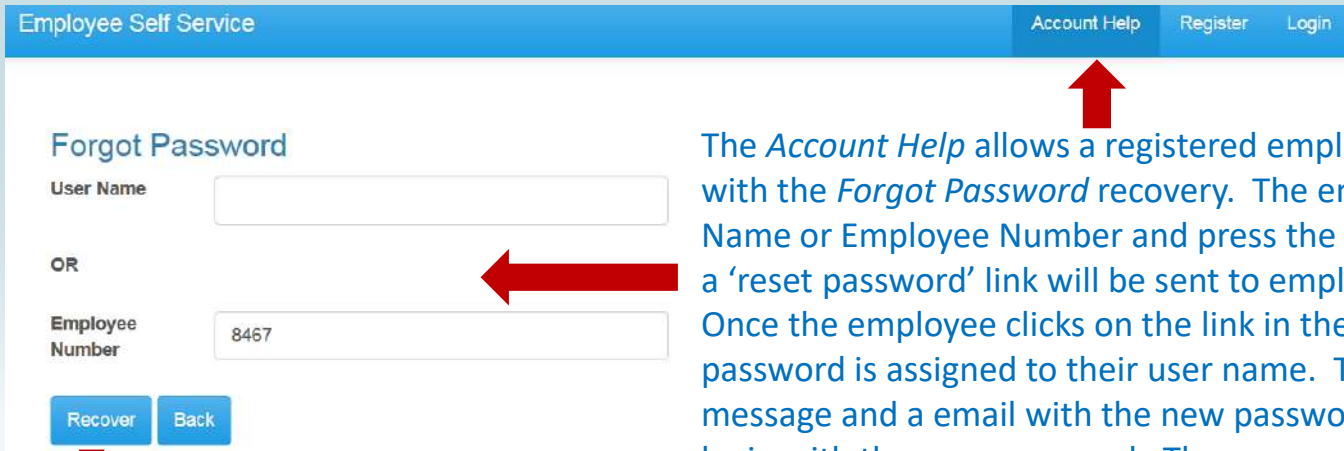
[Confirmation Link](#)

In case you need it, here's the confirmation code: **dIKg0-xx2c3iCLQ8mv\_BQ2**

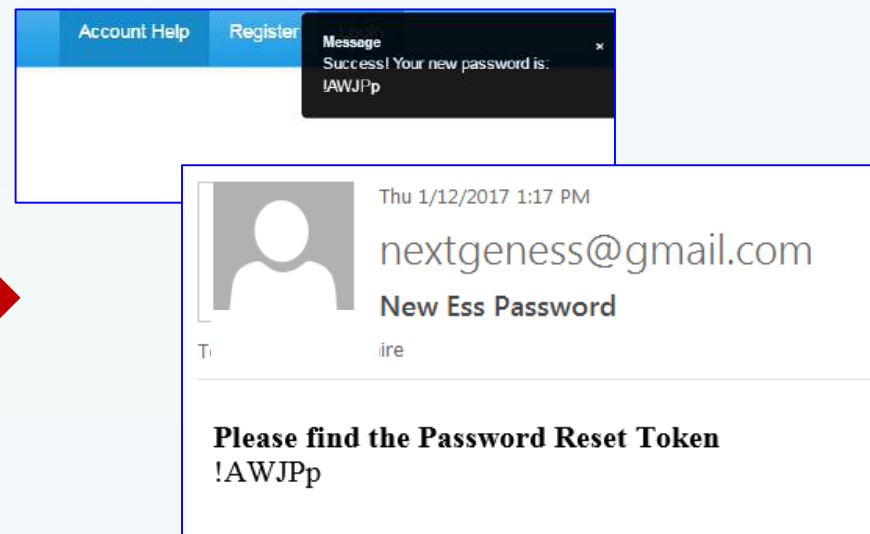
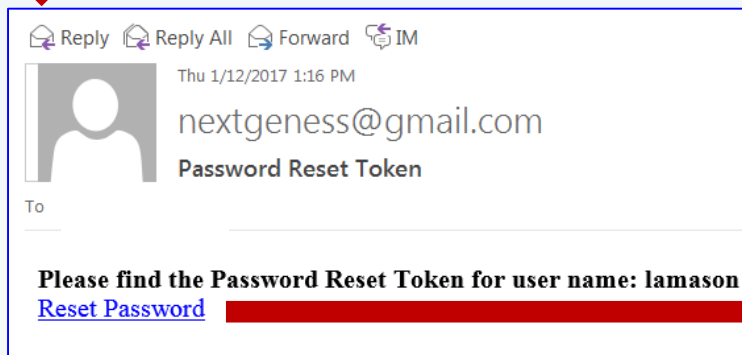
An email, with a confirmation link, will be sent to the email address the user provided when creating their account. User must use the confirmation link in the email to be confirmed as an authorized user for ESS. Once the employee has been confirmed as a user, they can login in with their user name and password.

# Employee Self Service – Account Help

*Account Help* allows the employee to recover their password.

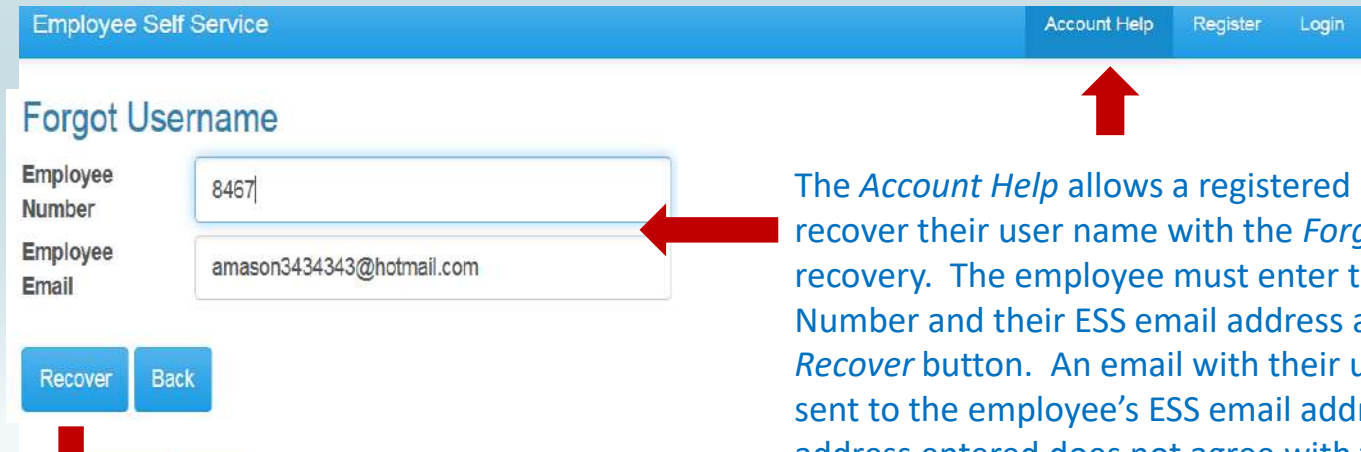


The *Account Help* allows a registered employee to recover their password with the *Forgot Password* recovery. The employee must enter their User Name or Employee Number and press the *Recover* button. An email with a 'reset password' link will be sent to employee's ESS email address. Once the employee clicks on the link in the email, a computer generated password is assigned to their user name. The employee will receive a message and a email with the new password. The employee can then login with the new password. The password can be changed (instructions on page 40). The *Forgot Password* will not work if the employee's account has not been confirmed (see previous screen).

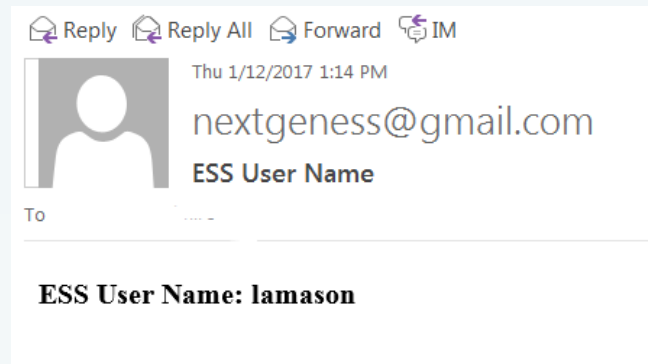


# Employee Self Service – Account Help

*Account Help* allows the employee to recover their user name.



The *Account Help* allows a registered employee to recover their user name with the *Forgot Username* recovery. The employee must enter their Employee Number and their ESS email address and press the *Recover* button. An email with their user name will be sent to the employee's ESS email address. If the email address entered does not agree with the email address the employee register with, a message will be displayed and no email will be sent. The *Forgot Username* will not work if the employee's account has not been confirmed (see page 4).



# Employee Self Service – Account Help

*Account Help* allows the employee to recover their user name.

Employee Self Service Account Help Register Login

Login

User name

Password

[Forgot username or password](#)

Log In

Forgot Password

User Name

OR

Employee Number

Recover Back

Forgot Username

Employee Number

Employee Email

Recover Back


The *Forgot username or password* link on login screen is a fast link to the *Forgot Password and Forgot Username* functionality under the *Account Help*.

# Employee Self Service – Menu

The Main screen will display the Logo and Welcome Message with the menu options available on the toolbar. Each menu options can be expanded to display transactions available. If user is an Administrator for ESS, they will also see Site Administration in their menu options.

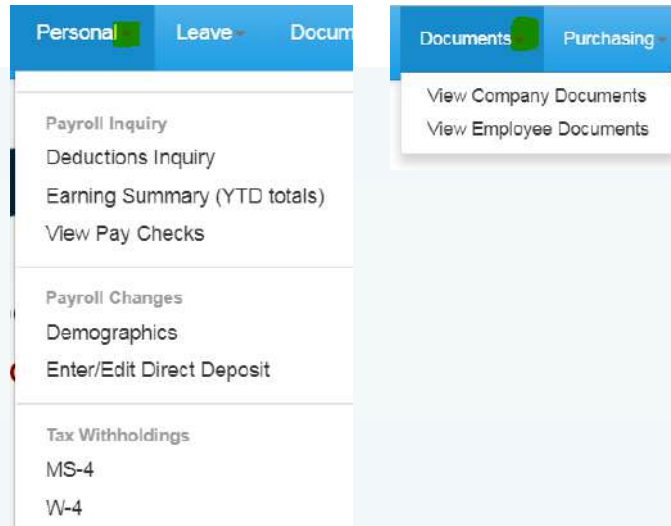


Employee Self Service   Task List   Personal ▾   Leave ▾   Documents ▾   Purchasing ▾   About ESS   Hello, lallen   Log Off



# HARRIS

Welcome to ABC School District's Employee Self Service. We appreciate all our employees and hope you enjoy your experience on Employee Self Service.



Personal ▾   Leave ▾   Documents ▾

- Payroll Inquiry
- Deductions Inquiry
- Earning Summary (YTD totals)
- View Pay Checks
- Payroll Changes
- Demographics
- Enter/Edit Direct Deposit
- Tax Withholdings
- MS-4
- W-4

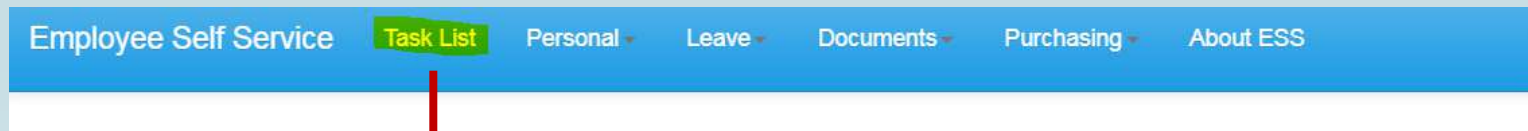
Documents ▾   Purchasing ▾

- View Company Documents
- View Employee Documents



# Employee Self Service - Task List

Employee can view or cancel pending requests and view past requests.



Task List will display a summary of all the employee's pending change requests.

My Pending Requests

Date Submitted	Request Type	Description		
01/03/2017 02:28:30PM	A4	A4 Change Request for	<a href="#">View Details</a>	<a href="#">Cancel</a>
01/03/2017 01:47:53PM	Demographic	Demographic Change Request for	<a href="#">View Details</a>	<a href="#">Cancel</a>

[View My Past/Current Requests](#)

Completed Requests (approved or rejected) can be viewed by the employee with the *View My Past/Current Requests*.

Details for the pending request can be viewed by employee.

Pending requests (unapproved) can be cancelled by employee.

# Employee Self Service – Task List

An employee who is also an Approver will have both their requests and the Approver Tasks displayed on their Tasks menu.



**Approver Tasks**

Date Submitted	Request Type	Approver Role	Description
01/04/2018 11:13:19AM	W4	HrApprover	W4 Change Request for
01/04/2018 02:15:50PM	MS4	HrApprover	MS4 Change Request for
01/05/2018 03:26:38PM	Demographic	HrApprover	Demographic Change Request for

[View Completed Approver Tasks](#)

**My Pending Requests**

Date Submitted	Request Type	Status	Description	View Details	Cancel
01/05/2018 03:26:38PM	Demographic	Submitted	Demographic Change Request for	<input type="button" value="View Details"/>	<input type="button" value="Cancel"/>

[View My Past/Current Requests](#)

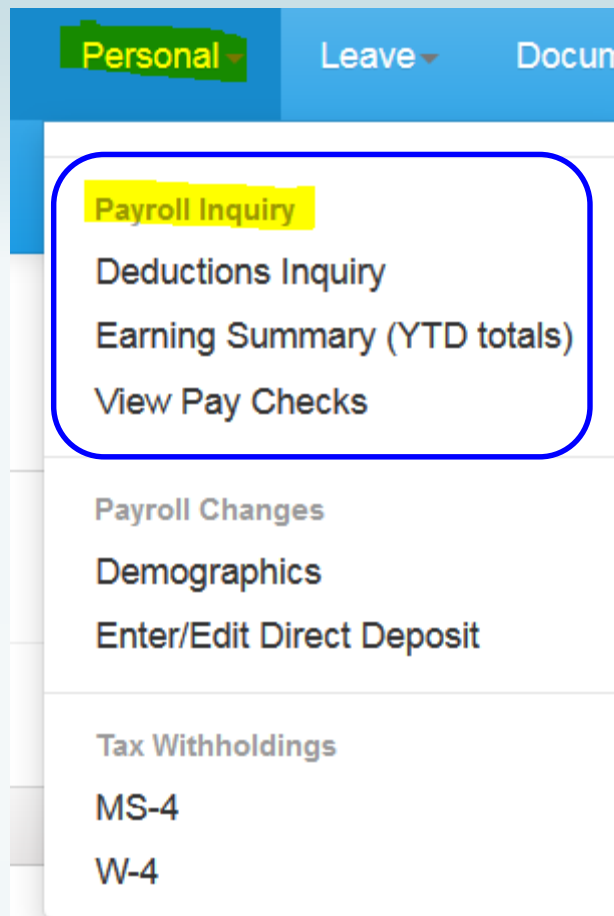
The Approver can approve or reject pending requests from employees on the Task List menu under Approver Task.

Approvers can view request history with the *View Completed Approver Tasks*.

Completed requests (approved or rejected) can be viewed by the employee with the *View My Past/Current Requests*.

# Employee Self Service–Personal/Payroll Inquiry

The Personal menu contains the sub-menu for Payroll Inquiry which includes the Inquiries available for the employee.



# Employee Self Service – Deduction Inquiry

The Deduction Inquiry allows for viewing and printing the employee and employer cost for employee elected deductions.

Payroll Deductions

User Instructions

Insurance elections can only be changed during open enrollment with the exemption of life changing events such as the birth of a child, death, divorce, retirement. See your insurance handbook for further explanation of life changing events.

[Back](#) [Print](#)

Deduction	Employee Cost	Employer Cost	
MAT INSURANCE	\$0.00	\$780.00	▲
RETIREMENT W/H	7.5000 %	11.9400 %	
AlaTrust Credit Union	\$100.00	\$0.00	
AMERICAN FAMILY LIFE INS	\$21.00	\$0.00	
LIBERTY NATIONAL INS	\$224.75	\$0.00	
PRE-PAID LEGAL SERVICES, INC.	\$15.95	\$0.00	
LIFE INS COMPANY OF ALABAMA	\$49.77	\$0.00	
PUBLIC ED EMP HEALTH INS PRO	\$15.00	\$0.00	
LIBERTY NATIONAL INSURANCE	\$0.00	\$0.00	
SECURITY BENEFIT-457	\$25.00	\$0.00	
HEALTHCARE SPENDING ACCT.	\$0.00	\$0.00	

# Employee Self Service – Earnings Summary

Employees can view and print their earnings summary by selecting the year they wish to view.

**Earnings Summary**

[Back](#) [Print](#)

**Earnings Year**

<b>Gross Wages</b>	\$11,422.90
<b>Federal Wages</b>	\$10,366.20
<b>Federal Tax Withheld</b>	\$714.83
<b>Social Security Wages</b>	\$11,347.90
<b>Social Security Tax Withheld</b>	\$703.56
<b>Medicare Wages</b>	\$11,347.90
<b>Medicare Tax Withheld</b>	\$164.55
<b>State Wages</b>	\$11,222.90
<b>State Tax Withheld</b>	\$401.14

# Employee Self Service-Earnings Summary (W2)

If the district uses Harris School Solutions' Document Services product to produce their W2 records, the employee can view and print their W2 for the selected year.

### Earnings Summary

[Back](#)
[Print](#)

Earnings Year: 2013

View W2

Gross Wages	\$22,189.68
Federal Wages	\$18,389.49
Federal Tax Withheld	\$935.71
Social Security Wages	\$20,353.68
Social Security Tax Withheld	\$1,261.90
Medicare Wages	\$20,353.68
Medicare Tax Withheld	\$295.09
State Wages	\$20,053.68
State Tax Withheld	\$646.29

Copy 3-To Be Filed With Employee			38-2095003 OMB No. 1545-0008			Copy 2-To Be Filed With Employee State			38-2095003 OMB No. 1545-0008		
FEDERAL Tax Return						City, or Local Income Tax Return					
a Employee soc. sec. no.	1 Wages, tips, other comp.	2 Federal income tax withheld	a Employee soc. sec. no.	1 Wages, tips, other comp.	2 Federal income tax withheld						
	18,389.49	935.71		18,389.49	935.71						
b Employer ID number (EIN)	3 Social security wages	4 Social security tax withheld	b Employer ID number (EIN)	3 Social security wages	4 Social security tax withheld						
	20,353.68	1,261.90		20,353.68	1,261.90						
	5 Medicare wages and tips	6 Medicare tax withheld		5 Medicare wages and tips	6 Medicare tax withheld						
	20,353.68	295.09		20,353.68	295.09						
c Employer name, address, and ZIP code Bibb County Board of Education						c Employer name, address, and ZIP code					
d Control Number 82						d Control Number 82					
e Employee name, address, and ZIP code						e Employee name, address, and ZIP code					
7 Social security tips	8 Allocated tips	9 Advance EIC payment	7 Social security tips	8 Allocated tips	9 Advance EIC payment						
10 Dependent care benefits	11 Nonqualified plans	12a Code See inst. for box 12 DD	10 Dependent care benefits	11 Nonqualified plans	12a Code See inst. for box 12 DD						
		9,837.24			9,837.24						
13 Statutory Employee	14 Other	12b Code	13 Statutory Employee	14 Other	12b Code						
Retirement plan	CAF 1,636.00	G 300.00	Retirement plan	CAF 1,636.00	G 300.00						
X	414 1,664.15	12c Code	X	414 1,664.15	12c Code						
Third-party sick pay	DUE 273.95	12d Code	Third-party sick pay	DUE 273.95	12d Code						
AL 037615	20,053.68	646.29	AL 037615	20,053.68	646.29						
15 State Employer state ID number	16 State wages, tips, etc.	17 State income tax	15 State Employer state ID number	16 State wages, tips, etc.	17 State income tax						
18 Local wages, tips, etc.	19 Local income tax	20 Locality name	18 Local wages, tips, etc.	19 Local income tax	20 Locality name						


Form W-2 Wage and Tax Statement 2013 Dept. of the Treasury - IRS  
This information is being furnished to the Internal Revenue Service.




# Employee Self Service – View Pay Checks

Employee can view and print check/statement summary for a specific check date range. The employee can view check detail by clicking on a particular check.

**My Checks**

Start Date  

End Date  


Select date range and click Search to list pay records. Select check number from list to view pay record.


Date	Number	Date	Gross	Net	Pay Adj.-Sub Info
05/31/2016	133504 - (Check)	05/31/2016	\$2,248.58	\$1,190.99	
04/29/2016	133350 - (Check)	04/29/2016	\$2,288.58	\$1,217.66	
03/31/2016	133174 - (Check)	03/31/2016	\$2,258.58	\$1,197.66	
02/29/2016	133011 - (Check)	02/29/2016	\$2,298.58	\$1,224.23	
01/31/2016	132855 - (Check)	01/31/2016	\$2,328.58	\$1,244.23	
12/18/2015	132689 - (Check)	12/18/2015	\$2,298.58	\$1,223.44	
11/20/2015	132524 - (Check)	11/20/2015	\$2,308.58	\$1,230.10	
10/30/2015	132369 - (Check)	10/30/2015	\$2,448.58	\$1,323.13	
09/30/2015	132208 - (Check)	09/30/2015	\$2,278.58	\$1,210.20	
08/31/2015	132074 - (Check)	08/31/2015	\$2,468.58	\$1,336.35	
07/31/2015	131943 - (Check)	07/31/2015	\$2,458.58	\$1,329.69	
06/30/2015	131756 - (Check)	06/30/2015	\$2,308.58	\$1,230.10	

# Employee Self Service – View Pay Checks

If an employee has extra pay, pay adjustments or substitute pay for a specific check, they can view detail information about the pay by clicking on *Adjusts/Sub Details* link.


**My Checks**

Start Date  

End Date  

Select date range and click Search to list pay records. Select check number from list to view pay record.

Date	Number	Date	Gross	Net	Pay Adj.-Sub Info
05/31/2016	133579 - (Check)	05/31/2016	\$195.00	\$180.08	<a href="#">Adjusts/Sub Details</a>
04/29/2016	133425 - (Check)	04/29/2016	\$65.00	\$60.03	<a href="#">Adjusts/Sub Details</a>
03/31/2016	133252 - (Check)	03/31/2016	\$195.00	\$180.08	<a href="#">Adjusts/Sub Details</a>
02/29/2016	133089 - (Check)	02/29/2016	\$260.00		
12/18/2015	132769 - (Check)	12/18/2015	\$130.00		
11/20/2015	132602 - (Check)	11/20/2015	\$195.00		
10/30/2015	132437 - (Check)	10/30/2015	\$227.50		

Pay Adj.-Sub Info 

Adjustments to Pay/Substitutes List for:

Subbed For	Date	Day(s)	Pay Rate	Paid
WILLIAMS, ..	4/28/2016	0.50	\$65.00	\$32.50
WILLIAMS, ..	4/26/2016	0.50	\$65.00	\$32.50
SMITH, ..	4/4/2016	0.50	\$65.00	\$32.50
LIGHTSEY, ..	4/26/2016	0.50	\$65.00	\$32.50
CHUC, ..	4/14/2016	0.50	\$65.00	\$32.50
CHUC, ..	4/15/2016	0.50	\$65.00	\$32.50
<b>Totals</b>		3		\$195.00




# Employee Self Service – View Pay Checks


Employee's detail check information can be displayed and printed.

Check Detail  
deedee

xxx-xx-1171  
1ST AVENUE  
WATSON, AL 35181

Check Information  
Check Date: 02/28/2013  
Pay Period Ending: 02/28/2013  
Check Number: 124420  
Note:



Print button. 

### Net Pay

Category	Current	Ytd
Gross Pay	\$7,440.32	\$10,841.24
Total Deductions - Mandatory	(\$1,664.78)	(\$2,464.39)
Total Deductions - Other	(\$610.42)	(\$917.89)
<b>Net Pay</b>	<b>\$5,165.12</b>	<b>\$7,458.96</b>

### Earnings

Category	Current	Ytd	Hrs
REGULAR	\$7,440.32	\$10,841.24	0.00
<b>Total Earnings</b>	<b>\$7,440.32</b>	<b>\$10,841.24</b>	<b>0.00</b>

### Bank Accounts

Category	Account	Amount
-	****1255	\$5,165.12
<b>Total Earnings</b>		<b>\$5,165.12</b>

### Deductions - Mandatory

Category	Current	Ytd
FICA	\$569.18	\$829.35
Federal	\$800.97	\$1,203.66
State	\$294.63	\$431.38
<b>Total Deductions - Mandatory</b>	<b>\$1,664.78</b>	<b>\$2,464.39</b>

### Deductions - Other

Category	Current	Ytd
RETIREMENT W/H	\$558.02	\$813.09
AEA NON CERTIFIED DUES	\$11.66	\$23.30
NEA NON CERTIFIED DUES	\$10.75	\$21.50
VALIC ANNUITY WITHHOLDINGS	\$30.00	\$60.00
<b>Total Deductions - Other</b>	<b>\$610.42</b>	<b>\$917.89</b>

# Employee Self Service – View Pay Checks

If the district is using Harris School Solutions' Document Service product to produce their checks and statements, the check/statement detail will display as a copy of the original check/statement. The employee can also print a copy of the displayed check/statement.

Check Detail

Page: 1 of 1 Automatic Zoom

HARRIS SCHOOL DISTRICT BOE					
EMPLOYEE NAME	EMPLOYEE NUMBER	PAY PERIOD END	DEPOSIT DATE	DEPOSIT NUMBER	
ELIZABETH TAYLOR	999999	10/15/2013	10/31/2013	485664	
DESCRIPTION	CURRENT AMOUNT	DESCRIPTION	CURRENT AMOUNT	YTD AMOUNT	
Regular Pay	5,852.85	FED WH	819.74	5,138.54	
		STATE WH	263.33	2,354.21	
		SS WH	324.20	324.20	
		MC WH	75.82	678.30	
		VALIC - G.	58.53	523.97	
		DOCO - G.F	402.00	3,618.00	
		HEALTH-CAF	401.48	3,613.32	
		VISION-CAF	13.97	125.73	
		FLEX MEDCL	208.33	1,874.97	
		DISABILITY	66.99	602.91	
		UNUM PROD	19.89	179.01	
		TRS RETIRE	351.17	3,143.57	
		FNB POLK	2,847.40	30,216.28	
<b>GROSS PAY</b>	<b>5,852.85</b>				
<b>FRINGE BENEFIT</b>	<b>0.00</b>			<b>0.00</b>	
LEAVE DESCRIPTION	BALANCE	TAKEN			
SICK LEAVE	19.00	0.50			
Open Enrollment - October 21-November 8, 2013			NET DEPOSIT	0.00	

485664

CSI TECHNOLOGY OUTFITTERS  
MOBILE, ALABAMA

DEPOSIT \*\*\*\*VOID\*\*\*VOID\*\*\*\*VOID\*\*\* DIRECT DEPOSIT  
\*\*\*\*VOID\*\*\*VOID\*\*\*VOID\*\*\*\*VOID\*\*\*

DEPOSIT DATE	DEPOSIT NO.	AMOUNT
10/31/2013	485664	0.00

TO THE ELIZABETH TAYLOR  
ORDER 541 EAST MAIN STREET  
OF ROME, GA 30161

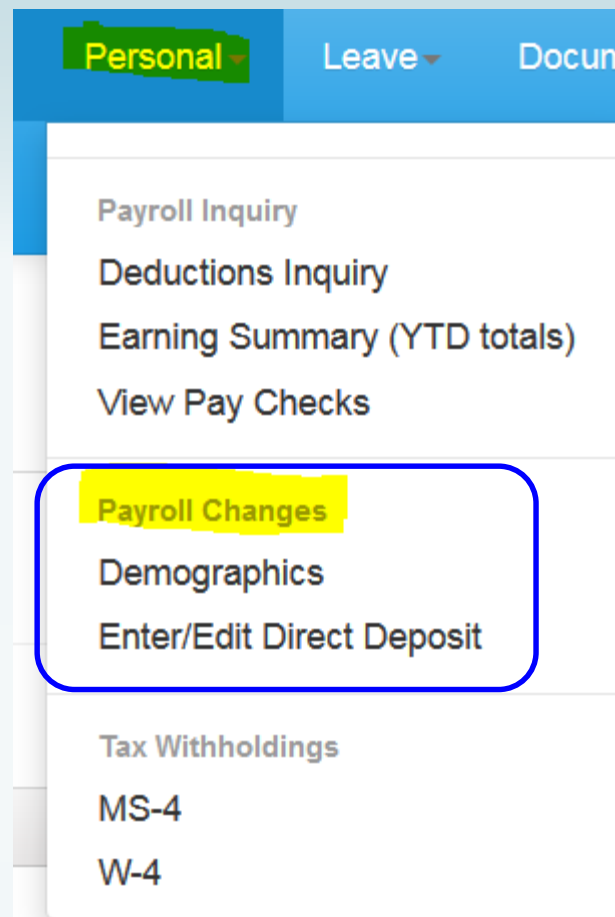
NON-NEGOTIABLE DIRECT DEPOSIT

Print toolbar is at bottom of check display.



# Employee Self Service–Personal/Payroll Changes

The Personal menu contains the sub-menu for Payroll Changes which includes a menu of all change options available to the employee.



# Employee Self Service - Demographics

Employee can request changes to a variety of demographic fields and upload multiple documents to be submitted with their change request. Both the employee and the approver can print the attached documents from the pending or completed request/task.

If employee has a pending request, their demographics will be displayed with the requested changes. The employee can change all demographic data.

The screenshot shows the 'Demographic Change Request' interface. At the top, the status is 'Pending' in red text, with a red arrow pointing to it. Below the status are 'Save', 'Back', and 'Print' buttons. A red arrow points to the 'Print' button with the text 'Information can be printed by selecting Print.' The 'User Instructions' section contains a note: 'All changes to name require a copy of social security card with same name. Please attach copy of social security card or bring your card by the Payroll department.' The form fields include: First Name (B), Last Name (ANDY), Email (ANDY\_B@HARRISSCHOOL.ORG), Address 1 (P. O. BOX), City (BAY SAINT LOU), State (MS), Zip Code (39520-1032), Middle Name, Birthday, Gender (Female), Address 2 (42 STREET), and Cell Phone. The 'Attachments' section has a 'Select files...' button, which is highlighted with a red box and a red arrow. A file upload dialog is open, showing the 'Documents' library with various folders and files.

Multiple files can be selected from multiple directories. Acceptable file formats include .gif, .jpg, .jpeg, .png, .doc, .docx, .xls, .xlsx, .pdf, .txt.

NOTE: A change to the email address on the demographic screen changes the email address in the payroll system which may be used by the school district when corresponding with the employee. It does not change the email address for the ESS notifications which was entered when the employee registered for ESS.

# Employee Self Service-Edit/Enter Direct Deposit

Employees can submit requests to add, delete, or change direct deposit accounts.

Where do I find bank account and routing numbers? →

Bank Name	Account	Routing	Account Type	Primary	Amount	
ALABAMA ONE CREDIT UNION	4242	262277189	Checking	true	\$0.00	<input type="button" value="x Delete"/>
ALABAMA ONE CREDIT UNION 2	5212	262277189	Checking	false	\$25.00	<input type="button" value="x Delete"/>

Buttons: Back, Print, + Add new record, Cancel changes, Save, Back

Confirm dialog: Check Sample

Routing #: 4231456789, Account #: 0301

If changing a routing number or the amount to deposit, click in the field, make the change and click submit.

If adding a new account, click on *Add New Record*, enter the information for the new account and click submit. Note: There can be only one primary account per employee.

If you are trying to delete a direct deposit, click on the *Delete* button beside the account information and then click submit.

# Employee Self Service-Edit/Enter Direct Deposit

Pending changes are displayed and employees can upload files for direct deposit requests.

The screenshot displays the 'Edit Direct Deposit Account(s)' interface. At the top, the status is 'Pending', indicated by a red arrow. Below this are 'Back' and 'Print' buttons. A table lists two direct deposit accounts from 'ALABAMA ONE CREDIT UNION'. The first account has an account number of 4242, routing number 262277189, and a primary status of 'true' with an amount of \$0.00. The second account has an account number of 5212, routing number 262277189, and a primary status of 'false' with an amount of \$25.00. Below the table, there are 'Save' and 'Back' buttons. The 'Attachments' section is highlighted with a red box and contains a 'Select files...' button, which is linked to a 'Choose File to Upload' dialog box. The dialog shows the 'Documents' library with various folders and files. A red arrow points from the 'Select files...' button to the dialog. Below the attachments section, there is an 'Instructions' section with the text: 'Please upload copy of voided check for all new direct deposit records for verification of information.'

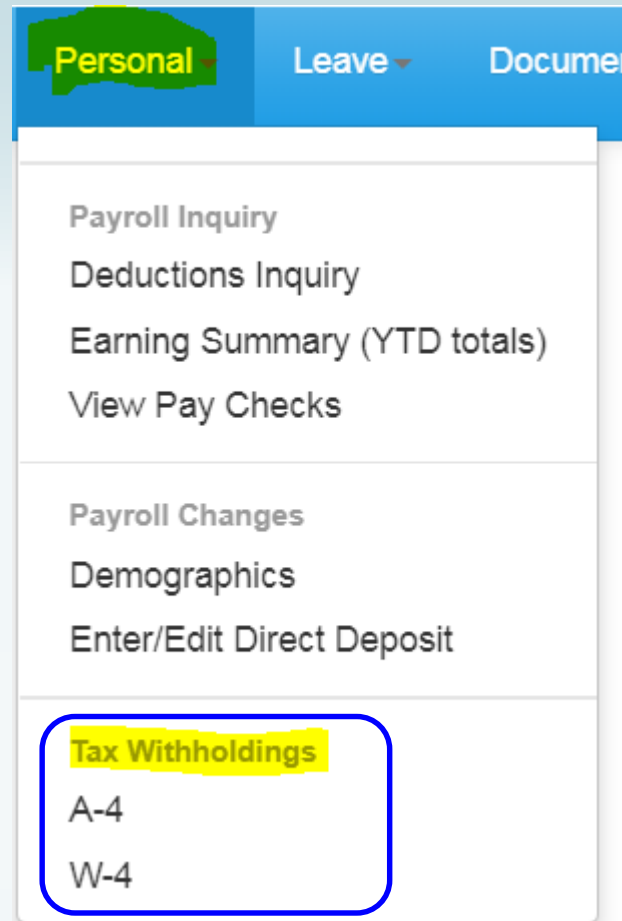
Bank Name	Account	Routing	Account Type	Primary	Amount	
ALABAMA ONE CREDIT UNION	4242	262277189	Checking	true	\$0.00	x Delete
ALABAMA ONE CREDIT UNION	5212	262277189	Checking	false	\$25.00	x Delete

If employee has a pending request, their direct deposit information will be displayed with the requested changes. The employee can change all pending direct deposit data.

Multiple files can be selected from multiple directories. Acceptable file formats include .gif, .jpg, .jpeg, .png, .doc, .docx, .xls, .xlsx, .pdf, .txt.

# Employee Self Service – Tax Withholdings

Tax Withholding under the sub menu Payroll Changes will include your State Withholding and W-4 Withholding Forms.



# Employee Self Service – A4 (Alabama)

Changes can be made to the employee's A4 with an electronic signature.

Current State of Alabama Employee's Withholding Allowances

Withholding Status	Exemptions	Dependents	Addl. Amt	Exempt
Single	1	0	0.00	<input type="checkbox"/>

User Instructions

All employees need to print a copy of new A4 for their records. Please see open task or completed task for the a copy of your new A4.

A4 Instructions

FORM  
**A-4** REV. 3/2014

**ALABAMA DEPARTMENT OF REVENUE**  
**Employee's Withholding Exemption Certificate**

EMPLOYEE'S FULL NAME \_\_\_\_\_ SOCIAL SECURITY NO. XXX-XX-4 \_\_\_\_\_

HOME ADDRESS 62 \_\_\_\_\_ ROAD \_\_\_\_\_ CITY MOUNDVILLE STATE AL ZIP 35474

SIGNATURE \_\_\_\_\_ DATE (6/6/2016) \_\_\_\_\_

Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

**HOW TO CLAIM YOUR WITHHOLDING EXEMPTIONS**

1. If you claim no personal exemption for yourself, write the figure "0", sign and date Form A-4 and file it with your employer.
2. If you are SINGLE or MARRIED FILING SEPARATELY a \$1,500 personal exemption is allowed. Write the letter "S" if claiming the SINGLE exemption or "MS" if claiming the MARRIED FILING SEPARATELY exemption. (Choose S or MS)
3. If you are MARRIED or SINGLE CLAIMING HEAD OF FAMILY, a \$3000 personal exemption is allowed. Write the letter "M" if you are claiming an exemption for both yourself and your spouse or "H" if you are single with qualifying dependents and are claiming HEAD OF FAMILY exemption. (Choose M or H)
4. Number of dependents (other than spouse) that you will provide more than one-half of the support for during the year. See instructions for dependent qualifications.
5. Additional amount, if any, you want deducted each pay period.
6. **This line to be completed by your employer:** Total exemptions (example: employee claims "M" on line 3 and "2" on line 4. Employer should use column M-2 (married with 2 dependents) in the withholding tables).

EMPLOYER NAME Board of Education FEIN \_\_\_\_\_ EMPLOYER STATE ID \_\_\_\_\_

Employee's current State withholding information is displayed.

Employee can view additional instructions for the A4 by clicking the *A4 Instructions* button.

Electronic signature and date must be exactly as displayed – no extra spaces, dashes or periods.

If requesting a change for A4, the employee must enter **ALL** information on the A4 form, not just the change.



# Employee Self Service – G4 (Georgia)

Changes can be made to the employee's G4 with an electronic signature.

The screenshot shows the 'Current State of Georgia Employee's Withholding Allowances' form. At the top, a table displays the current state: MARRIED - FILING JOINT (B), 2 dependents, 0 Emp./Spouse, 0 Addl. Allowances, 0 Addl. Amt, and 0.00 Exempt. Below this is the 'G4 Instructions' section with 'Save' and 'Back' buttons. The main form is titled 'STATE OF GEORGIA EMPLOYEE'S WITHHOLDING ALLOWANCE CERTIFICATE'. It includes sections for: 1a. YOUR FULL NAME, 1b. YOUR SOCIAL SECURITY NUMBER, 2a. HOME ADDRESS, 2b. CITY, STATE AND ZIP CODE, 3. MARITAL STATUS (with options A-E), 4. DEPENDENT ALLOWANCES, 5. ADDITIONAL ALLOWANCES, and 6. ADDITIONAL WITHHOLDING. A 'WORKSHEET FOR CALCULATING ADDITIONAL ALLOWANCES' section follows, with fields for 'Yourself', 'Spouse', and 'Blind' (Age 65 or over), and a 'Number of boxes checked' field. Below the worksheet is the 'Update Line 5' button. The bottom section includes '7. Letter Used' and '8. EXEMPT' options, and a signature line at the very bottom with a date field.

Employee's current State withholding information is displayed.

Employee can view instructions for the G4 by clicking the *G4 Instructions* button.

If requesting a change for G4, the employee must enter **ALL** information on the G4 form, not just the change.

Line 5 - Additional Allowances is updated from the worksheet entries and the *Update Line 5* button.

Electronic signature and date must be exactly as displayed – no extra spaces, dashes or periods.

# Employee Self Service – MS4 (Mississippi)

Changes can be made to the employee's MS4 with an electronic signature.

The screenshot shows the 'Current State of Mississippi Employee's Withholding' page. At the top, a table displays the following data:

Withholding Status	Dependents	Emp./Spouse	Add. Allowances	Add. Amt	Total Exempt Amt	Exempt
Both Spouses Working	0	0	0	0.00	3000.00	

Below the table is the 'User Instructions' section with a 'MS4 Instructions' button. A red arrow points to this button. The main form is titled 'MISSISSIPPI EMPLOYEE'S WITHHOLDING EXEMPTION CERTIFICATE' and contains the following sections:

- Employee's Name** and **SSN** fields.
- Employee's Residence Address** fields: Number and Street, GULFPORT City or Town, MS State, 39507 Zip.
- Single** status: Enter \$6,000 as exemption. Amount Claimed: 0.
- Marital Status (Check One)**: (a) Spouse NOT employed: Enter \$12,000. Amount Claimed: 0. (b) Spouse IS employed: Enter that part of \$12,000 claimed by you in multiples of \$500. See instructions 2(b) below. Amount Claimed: 0.
- Head of Family**: Enter \$9,500 as exemption. To qualify as head of family, you must be single and have a dependent living in the home with you. See instructions 2(c) and 2(d) below. Amount Claimed: 0.
- Dependents**: 0. You may claim \$1,500 for each dependent\*, other than for taxpayer and spouse, who receives chief support from you and who qualifies as a dependent for Federal income tax purposes. \* A head of family may claim \$1,500 for each dependent EXCLUDING the one which qualifies you as head of family. Multiply number of dependents claimed by you by \$1,500. Amount Claimed: 0.
- Age and Blindness**: Includes checkboxes for Age 65 or older and Blind, and radio buttons for Husband, Wife, and Single. Amount Claimed: 0.
- TOTAL AMOUNT OF EXEMPTION CLAIMED**: 0. A red arrow points to this field.
- Additional dollar amount of withholding per pay period if agreed to by your employer**: 0.
- SCRA**: If you meet the conditions set forth under the Service Member Civil Relief Act, as amended by the Military Spouses Residency Relief Act, and have no Mississippi tax liability, write "Exempt" on Line 6. You must attach a copy of the Federal Form DD-2058 and a copy of your Military Spouse ID Card to this form so your employer can validate the exemption claim.

At the bottom, there is a declaration: 'I declare under the penalties imposed for filing false reports that the amount of exemption claimed on this certificate does not exceed the amount to which I am entitled or I am entitled to claim exempt status.' Below this are fields for 'Employee Signature' and 'Date: 6/7/2016'. Red arrows point to these fields.

Employee's current State withholding information is displayed.

Employee can view instructions for the MS4 by clicking the *MS4 Instructions* button.

If requesting a change for MS4, the employee must enter **ALL** information on the MS4 form, not just the change.

The *Total Amount of Exemption Claimed* will be the total of selected status amount, dependent amount and additional allowances.

Electronic signature and date must be exactly as displayed – no extra spaces, dashes or periods.

# Employee Self Service – W4

Changes can be made to the employee's W4 with an electronic signature.

Current Withholding Allowances

Type	Tax Status	Allowances	Addl. Amt	Exempt
Federal	Single	0	100.00	<input type="checkbox"/>
State	Single	0	0.00	<input type="checkbox"/>

Form **W-4** **Employee's Withholding Allowance Certificate** OMB No. 1545-0074  
Department of the Treasury **2016**  
Internal Revenue Service

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.  
[www.irs.gov/pub/irs-pdf/fw4.pdf](http://www.irs.gov/pub/irs-pdf/fw4.pdf)  
[IRS.GOV W4 WorkSheet Application](#)

1. Your first name and middle initial  
DEEDEE S

Last Name  
COOKER

2. Your social security number  
XXX-XX-

Home address(number and street or rural route) Address 3   
Note. If married, but legally separated, or spouse is a nonresident alien, check the "Single" box.

City or town, state, and ZIP code  
WEST BLOCTON, AL 35184

If your last name differs from that shown on your social security card, check here. You must call 1-800-772-1213 for a replacement card.

5. Total number of allowances you are claiming (from line H above or from the applicable worksheet on page 2) 5

6. Additional amount, if any, you want withheld from each paycheck 6

7. I claim exemption from withholding for 2016, and I certify that I meet both of the following conditions for exemption.  
• Last year I had a right to a refund of all federal income tax withheld because I had no tax liability and  
• This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.  
If you meet both conditions, write "Exempt" here 7

Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

Employee's signature (this form is not valid unless you sign it.) DEEDEE S COOKER  Date(m/d/yyyy) 6/7/2016

Employer Name/Address  
County Board of Education

Office Code(optional)  Employer FEIN

Employee's current Federal and State withholding information is displayed.

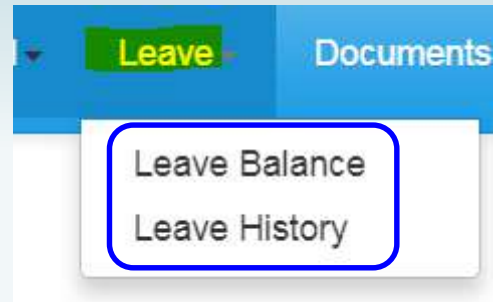
IRS instructions and worksheet are accessible from W4 form.

If requesting a change for W4, the employee must enter **ALL** information on the W4 form, not just the change.

Electronic signature and date must be exactly as displayed – no extra spaces, dashes or periods.

# *Employee Self Service – Leave*

Leave Menu allows the employee to see their leave history and leave balances.



# Employee Self Service – Leave Balance

Employee can view and print their current leave balances. The leave earned and used are reflective of the last completed payroll.

## Leave Balance Summary - 2016

[Back](#)[Print](#)

### User Instructions

Leave balances are reflective of the last payroll processed and updated. Please review your leave balances after you receive your check or statement.

Description	Hrs/Days	Accum. Rate	Prior Yr. Bal.	Current Earned	YTD Used	Balance
1 - SICK - CENTRAL OFFICE	D	12	264	11	17	258
2 - PERSONAL - CENTRAL OFFICE	D	5	0	5	0	5
3 - VACATION - CENTRAL OFFICE	D	10	18.5	10	5.5	23
SB - SICK BANK - CENTRAL OFFICE	D	999	5	0	0	5

# Employee Self Service – Leave History

Employee can view and print their detail leave history for a specific date range.

Leave History

[Back](#) [Print](#)

Start Date  End Date

Payroll Date	Hrs/Days	Description	Used
01/12/2015	D	PROFESSIONAL	1.00
01/16/2015	D	SICK	1.00
03/05/2015	D	SICK	1.00
03/20/2015	D	SICK	1.00
03/26/2015	D	SICK	1.00
04/20/2015	D	SICK	0.50
04/23/2015	D	SICK	1.00
05/07/2015	D	PERSONAL	1.00
05/08/2015	D	PERSONAL	1.00
05/15/2015	D	VACATION	1.00
05/21/2015	D	SICK	0.50
05/22/2015	D	SICK	1.00
06/05/2015	D	VACATION	1.00

1 - 13 of 13 items

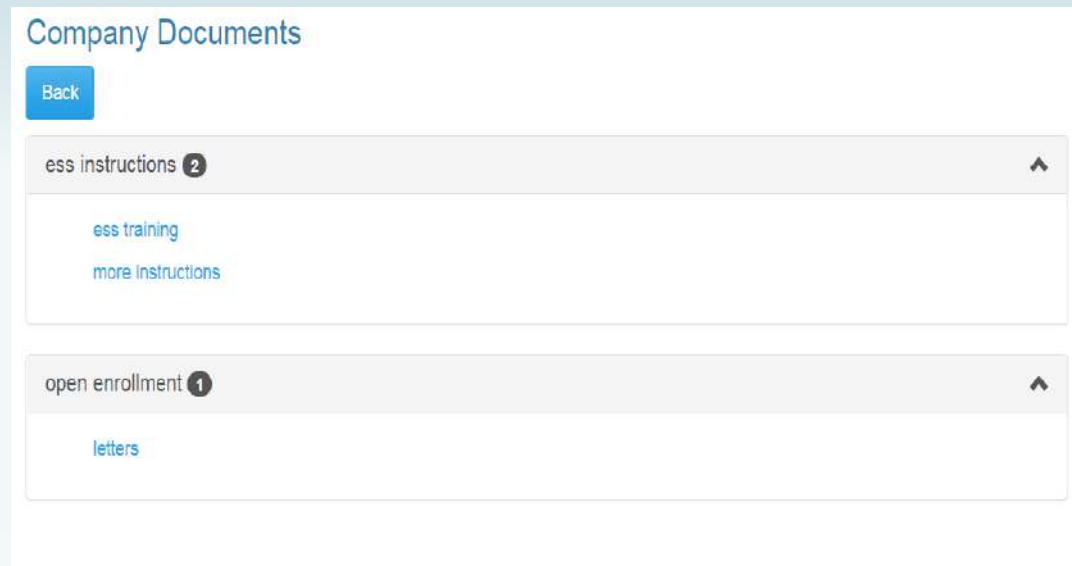
# Employee Self Service–Documents

Documents menu allows the employee to view company documents or the employee's personal documents. The Electronic Forms Agreement will be available in the menu IF your district is using this option.



# Employee Self Service–View Company Documents

View Company Documents allows employees view and print any documents uploaded by the Document Administrator. This is a great way to give employee access to Policy and Procedure Manuals, retirement documents, and Open Enrollment documents.





# Employee Self Service–View Company Documents

Employee can view and print documents that their District has placed in Company Documents by clicking the category and selecting the document.

The screenshot displays the 'Company Documents' interface. At the top left, there is a 'Back' button. Below it is a list of document categories, each with a '1' icon indicating one document is available. The categories are: 'EmployeeHirePackage', 'EmployeeNewHirePackage', 'new employee', 'new policy', and 'retirement information'. The 'Policy Manual' document under the 'EmployeeHirePackage' category is highlighted with a red box, and a red arrow points from it to a preview window. The preview window shows the title page of the 'Employee Policy and Procedures Handbook' with the 'HARRIS' logo at the top and a toolbar at the bottom.

Company Documents

Back

EmployeeHirePackage 1

Policy Manual

EmployeeNewHirePackage 1

new employee 1

new policy 1

retirement information 1

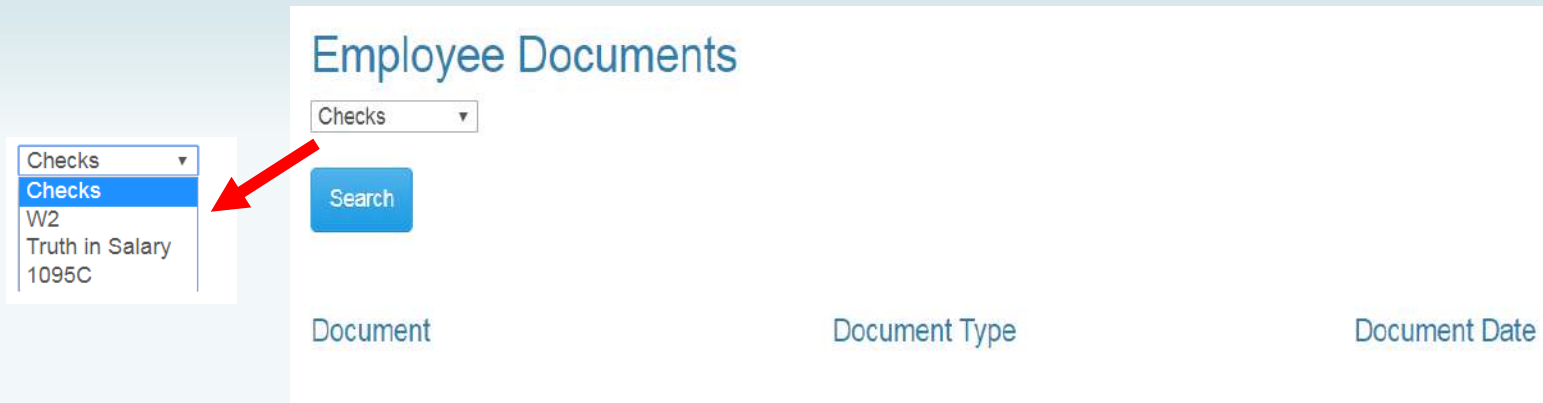
**HARRIS**

**Employee Policy and Procedures Handbook**

100%

# Employee Self Service–View Employee Documents

Employee can view and print their detail check, W2, Truth In Salary or 1095C forms if these documents are available.



The screenshot displays the 'Employee Documents' interface. At the top, the title 'Employee Documents' is shown in blue. Below the title is a dropdown menu currently set to 'Checks'. A red arrow points from this dropdown to a larger, expanded view of the dropdown menu on the left. The expanded menu lists four options: 'Checks' (highlighted in blue), 'W2', 'Truth in Salary', and '1095C'. Below the dropdown menu is a blue 'Search' button. At the bottom of the interface, there are three column headers: 'Document', 'Document Type', and 'Document Date'.

Document	Document Type	Document Date
----------	---------------	---------------

# Employee Self Service–View Employee Documents

Employee can view and print their detail check information by selecting checks from drop down and pressing the search button. A list of all the employee check/statements will be displayed. Employee will then click on the check/statement to view and the check will open in a separate browser tab. The check/statement can then be printed or saved. Each tab that is opened with detail records must be closed manually when logging out of ESS.

The screenshot displays the 'Employee Documents' interface. At the top, there is a dropdown menu set to 'Checks' and a blue 'Search' button. Below this is a list of document numbers: 127566, 128078, 128591, 283, 648, 1016, 1386, 1756, 2132 (highlighted with a red arrow), 2508, and 2883. To the right of the list, there are columns for 'Document Type' and 'Document Date'. The 'Document Type' for all items is 'Check', and the 'Document Date' ranges from 8/27/2013 to 1/27/2014.

Below the list is a detailed pay stub for document 2132. The pay stub includes the following information:

EMPLOYEE NAME	EMPLOYEE NUMBER	PAY PERIOD END	CHECK DATE	CHECK NUMBER
INSTRUCTION - TEACHER	4,336.00	04/30/2014	04/30/2014	2132
DESCRIPTION	CURRENT AMOUNT	DESCRIPTION	CURRENT AMOUNT	YTD AMOUNT
1	U.S. W/HEAL	253.18	1,012.72	
3	FMT	253.76	1,320.04	
4	SNR	154.16	616.64	
11	RETIREMENT	303.20	1,300.80	
20	AVOIDACTIV	3.60	14.40	
21	NSA DED	49.20	71.80	
27	AMER FAM L	71.50	206.00	
38	NSA C DEDS	24.00	96.00	
83	N/C W/HEAL	59.22	230.84	
424	FRFR13	222.00	880.00	
427	AMER FAM L	30.42	321.68	
909	FIRST STAT	2,800.71	11,260.08	
<b>CREDIT PAY</b>	<b>4,336.00</b>	<b>17,344.00</b>		
<b>PRIME BENEFIT</b>	<b>0.00</b>	<b>0.00</b>		
<b>LEAVE DEDUCTION</b>	<b>BALANCE</b>	<b>DRAWN</b>		
SICK	10.00	6.00		
PERSONAL	4.00	1.00		
SICK BANK	5.00	0.00		
				<b>NET PAY 0.00</b>

At the bottom of the pay stub, it says 'Board of Education Payroll Account 2132'. There is also a small table with the following data:

CHECK DATE	CHECK NO.	AMOUNT
04/30/2014	2132	0.00

# Employee Self Service–View Employee Documents

Employee can view and print their W2 records by selecting W2 from drop down and pressing the search button. A list of all the employee W2s by year will be displayed. Employee will click on the W2 to view the detail record. The document will open in a separate browser tab. The W2 can then be printed or saved. Each tab that is opened with detail records must be closed manually when logging out of ESS.

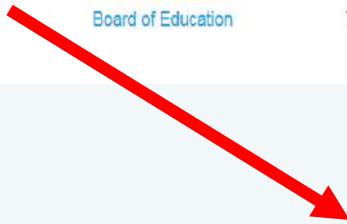
**Employee Documents**

W2

Search

Document	Document Type	Document Date
2013 W2 <sub>1</sub>	W2	2/6/2014 9:52:35 AM
2014 W2 <sub>1</sub>	W2	1/19/2015 12:27:50 PM

Board of Education  
Board of Education



Copy 2-To Be Filled With Employee			30-2099503 FEDERAL Tax Return OMB No. 1545-0048			Copy 2-To Be Filled With Employee State			30-2099503 City of Local Income Tax Return OMB No. 1545-0038		
a Employee soc. sec. no.		1 Wages, tips, other comp.		2 Federal income tax withheld		a Employee soc. sec. no.		1 Wages, tips, other comp.		2 Federal income tax withheld	
		16,089.45		935.71				15,389.45		955.71	
b Employer ID number (EIN)		3 Social security wages		4 Social security tax withheld		b Employer ID number (EIN)		3 Social security wages		4 Social security tax withheld	
20-153-68		20,353.68		1,251.30		20-153-68		20,353.68		1,245.94	
c Medicare wages and tips		5 Medicare wages and tips		6 Medicare tax withheld		c Medicare wages and tips		5 Medicare wages and tips		6 Medicare tax withheld	
20,153.68		20,153.68		295.09		20,153.68		20,153.68		256.09	
c Employer name, address, and ZIP code 8800 Coventry Board of Education						c Employer name, address, and ZIP code					
d Control Number 62						d Control Number 62					
e Employee name, address, and ZIP code						e Employee name, address, and ZIP code					
7 Social security tips		8 Allocated tips		9 Advance EIC payment		7 Social security tips		8 Allocated tips		9 Advance EIC payment	
10 Dependent care benefits		11 Nonqualified plans		12a Code See inst. for box 12		10 Dependent care benefits		11 Nonqualified plans		12a Code See inst. for box 12	
				DD 9,837.24						DD 9,837.24	
13 Statutory Employee		14 Other		12b Code		13 Statutory Employee		14 Other		12b Code	
Retirement plan		CAF 1,856.06		G 309.00		Retirement plan		CAF 1,856.06		G 309.00	
X		414 1,654.15		12c Code		X		414 1,654.15		12c Code	
Third-party sick pay		DUE 273.95		12d Code		Third-party sick pay		DUE 273.95		12d Code	
AL 037616		20,063.68		646.29		AL 037616		20,063.68		646.29	
15 State Employer state ID number		16 State wages, tips, etc.		17 State income tax		15 State Employer state ID number		16 State wages, tips, etc.		17 State income tax	
19 Local wages, tips, etc.		18 Local income tax		20 Locality name		19 Local wages, tips, etc.		18 Local income tax		20 Locality name	
Form W-2 Wage and Tax Statement 2013 Dept. of the Treasury - IRD This information is being furnished to the Internal Revenue Service						Form W-2 Wage and Tax Statement 2013 Dept. of the Treasury - IRD					

# Employee Self Service–View Employee Documents

Employee can view and print their Truth In Salary documents by selecting Truth In Salary from drop down and pressing the search button. A list of all the employee's document by year will be displayed. Employee will click on the document to view the detail. The document will open in a separate browser tab. The document can then be printed or saved. Each tab that is opened with a detail record must be closed manually when logging out of ESS.

**Employee Documents**

Truth in Salary ▾

Search

Document	Document Type	Document Date
<a href="#">2015 Truth</a>	Truth in Salary	6/3/2016 10:30:34 AM
<a href="#">2016 Truth</a>	Truth in Salary	1/10/2017 8:52:11 AM

**TRRS/PEEHIP Truth in Salary Act Information for Active Education Employees  
Fiscal Year 2016**

Rpt Loc: 0095 - -  
Pers Id:

Total Gross Wages for the Fiscal Year:	\$34,688.00
Total Social Security Benefits for Fiscal Year:	\$2,011.69
Total Medicare Benefits for Fiscal Year:	\$470.45
Total Retirement Benefits for Fiscal Year:	\$4,141.76
Total Health Insurance Benefits for Fiscal Year:	\$6,240.00
Total SUI Benefits for Fiscal Year:	\$3.44
Total Misc. Benefits (ex- Life Ins) for Fiscal Year:	\$0.00
<b>Grand Total of Benefits for Fiscal Year:</b>	<b>\$47,955.34</b>

Total Leave Units Accrued for the Leave Year: 14.00  
Total Comp Time Units Accrued for the Leave Year: 0.00  
11-Month Employees, Eligible for Holidays, Accrued: 0  
12-Month Employees, Eligible for Holidays, Accrued: 0

Average Annual Employer Subsidy for PEEHIP Coverage:  
Active Single: \$4,585.80  
Active Family: \$10,231.68

Total Amount of Employer Contributions to TRS: \$737,664,554  
Percentage of TRS Employer Contributions:  
Compared to the Total Amount of the Education Trust Fund Appropriations: 5.04%  
The Funded Ratio of TRS as of Fiscal Year 2014: 67.5%



# Employee Self Service - Electronic Form Agreement

Employee can change their choice for tax form delivery by selecting the option and save. Districts can also require that the Agreement be signed by all employees on initial login to ESS. This option may not be used by all districts.

## Electronic Form Agreement - Please select one of the following for form delivery.

Harris school system is please to offer electronic delivery of all your forms beginning January, 2018. Your W2, and Pay Forms will be available for viewing and downloading in PDF format through your Employee Self Service account. In order to receive your forms electronically instead of paper copy, you need to give your consent before December 10, 2017. Your electronic W2 forms will be available for viewing by January, 2018. For more information on electronic consent, see Company Documents – Electronic Form Consent.

Example Text Only

- I consent to receive all my tax forms (W2, 1095, Alabama Truth in Salary) electronically each year. I understand I will NOT receive any paper copies of forms.
- I want to receive paper forms for all my tax forms (W2, 1095, Alabama Truth in Salary).

Save

# Employee Self Service – About ESS

The *About ESS* Menu option identifies the Product Version and the District. The District's contact information for Employee Self Service can also be displayed here.



## About Employee Self Service

[Back](#) [Print](#)

Customer:	COUNTY BOARD OF EDUCATION
Product Version:	2.20.2.99
Accounting System:	NextGen
Accounting System Version:	2

Please contact Alice Wonderland for any problems related to ESS for ABC County Board of Education.

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# Employee Self Service – Manage Account

An employee can manage their ESS account by clicking on their user name in the toolbar.

Manage Account.

You're logged in as **rsmith**.

[Change account](#) [Back](#)

Change password

Current password

New password

Confirm new password

Employee Information

Employee Number

User Name

First Name

Last Name

Email

No Alert Emails

Employee clicks on their user name to manage their account.

The employee can change their password by entering their current password and the new password.

The employee can change the name and email address associated with their ESS account.

The employee can choose not to receive email alerts for requests and approvals in ESS.