HARRIS

Polk School District

Employee Self Service (ESS)
## Tutorial

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 current and past check information

- Print W2s for past years

Employee Self Service – Register

Registration on Log In screen

https://www2.polk.k12.ga.us/EmployeeSelfService
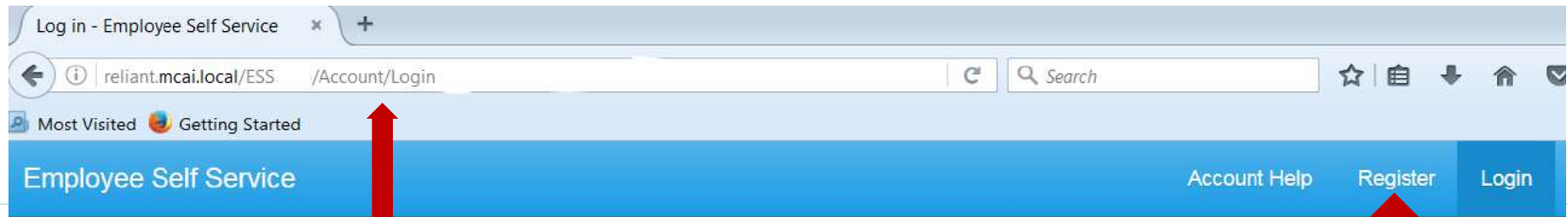
Enter Web Address for ESS into your browser.

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

Register

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.

Employee Self Service - Register

All employees must confirm their new ESS account before being allow access to ESS

An email, with a confirmation link, will be sent to the email address the user provided when creating their account. The email will also include a full confirmation link that can be copied and pasted into your browser. User must use one of the confirmation links in the email to be confirmed as an authorized user for ESS. Once the employee has been confirmed as a user, they can login with their user name and password.

Employee Self Service – Account Help

Account Help allows an employee to recover their password

Employee Self Service   Account Help   Register   Login

Forgot Password

User Name

OR

Employee Number   8467

Recover   Back

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 an email with the new password. The employee can then login with the new password. The password can be changed. The *Forgot Password* will not work if the employee's account has not been confirmed (see previous screen).

Reply   Reply All   Forward   IM

Thu 1/12/2017 1:16 PM

nextgeness@gmail.com

Password Reset Token

To

Please find the Password Reset Token for user name: lamason
Reset Password

Account Help   Register   Login

Message
Success! Your new password is: IAWJPp   ✕

Thu 1/12/2017 1:17 PM

nextgeness@gmail.com

New Ess Password

To   ire

Please find the Password Reset Token
!AWJPp

Employee Self Service – Account Help

Account Help allows an 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 username will be sent to the employee's ESS email address. If the email address entered does not agree with the email address the employee registered 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.

Employee Self Service – Account Help

Account Help allows an 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.*

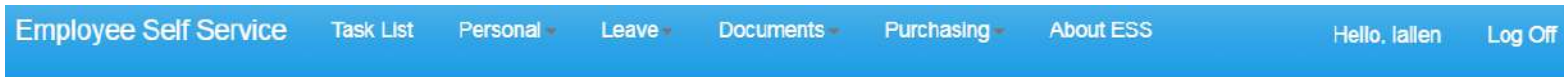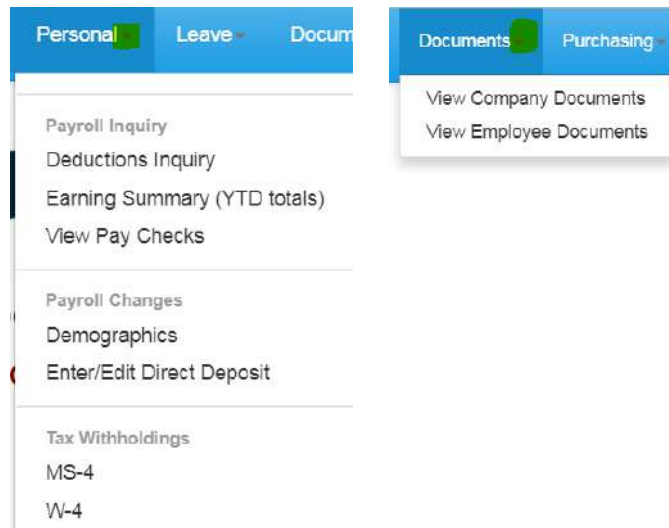# *Employee Self Service – Menu*

The Main screen will display the PSD logo and Welcome Message with the menu options available on the toolbar. Each menu option can be expanded to display transactions available.

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

POLK SCHOOL DISTRICT

Welcome to the Polk School District Employee Self Service website!

Personal   Leave ▾   Docum

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

Employees can view or cancel pending requests and view past requests

Employee Self Service **Task List** Personal ▾ Leave ▾ Documents ▾ Purchasing ▾ About ESS

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	▲ View Details	× Cancel
01/03/2017 01:47:53PM	Demographic	Demographic Change Request for	▲ View Details	× Cancel

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–Personal/Payroll Inquiry

The Personal menu contains the sub-menu for Payroll Inquiry which includes the Inquiries available to an employee
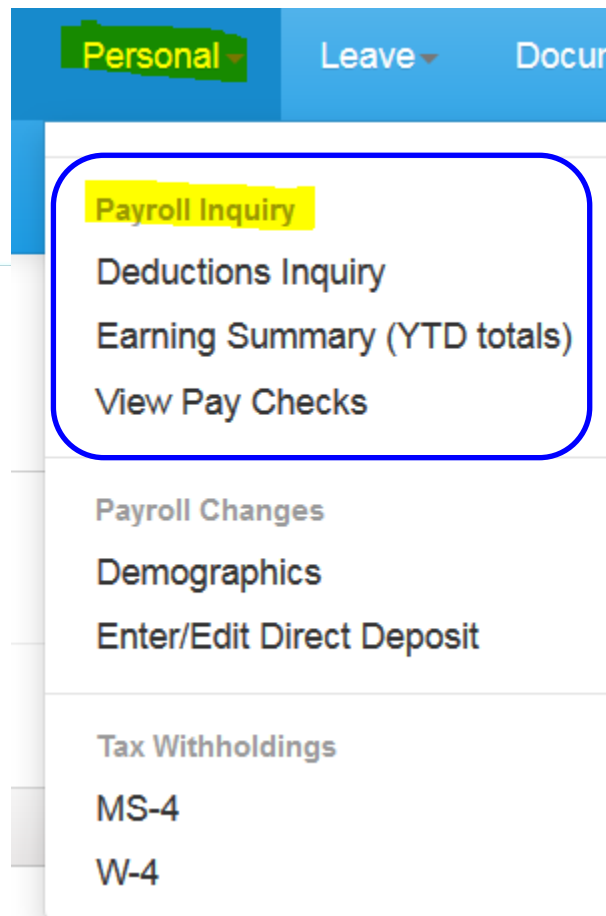
Employee Self Service – Deduction Inquiry

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 exception of a Qualifying Event, such as the birth or adoption of a child, death, divorce, retirement, etc. See your Decision Guide for further explanation of Qualifying Events. Please contact Payroll at (770) 748-3821 should you have any questions.

Back   Print

Deduction	Employee Cost	Employer Cost	
VALIC 457(b) PLAN	5.0000 %	$0.00	
COOSA VALLEY CRED. UNION G.F.	$475.00	$0.00	
HEALTH-CLASS.- GF/SHELTERED	$250.90	$945.00	
Metlife	$64.13	$0.00	
SUPERIOR VISION INSURANCE	$5.93	$0.00	
FLEX SPENDING MEDICAL RMB	$200.00	$0.00	
UNUM BOARD PAID LIFE	$0.59	$1.38	
UNUM VOLUNTARY LIFE	$142.41	$0.00	
EMPLOYEES RETIREMENT SYSTEM	1.5000 %	24.6600 %	

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	2016
Gross Wages	$11,422.90
Federal Wages	$10,366.20
Federal Tax Withheld	$714.83
Social Security Wages	$11,347.90
Social Security Tax Withheld	$703.56
Medicare Wages	$11,347.90
Medicare Tax Withheld	$164.55
State Wages	$11,222.90
State Tax Withheld	$401.14

Employee Self Service-Earnings Summary (W2)

Employees can view and print their W2 for the selected year.   Select the appropriate Earnings Year to see your previous W2.

Employee Self Service – View Pay Checks

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

My Checks

Start Date 1/1/2015

End Date 6/4/2016 [Search]

[Back] [Print]

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 `1/1/2015`

End Date `6/4/2016`   [Search]

[Back] [Print]

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	Adjusts/Sub Details
04/29/2016	133425 - (Check)	04/29/2016	$65.00	$60.03	Adjusts/Sub Details
03/31/2016	133252 - (Check)	03/31/2016	$195.00	$180.08	Adjusts/Sub Details
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
Totals		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

Print button.

Check Information

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

HARRIS School Solutions

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)
Net Pay	$5,165.12	$7,458.96

Earnings

Category	Current	Ytd	Hrs
REGULAR	$7,440.32	$10,841.24	0.00
Total Earnings	$7,440.32	$10,841.24	0.00

Deductions - Mandatory

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

Bank Accounts

Category	Account	Amount
	****1255	$5,165.12
Total Earnings		$5,165.12

Deductions - Other

Category	Current	Ytd
RETIREMENT W/H	$558.02	$813.09
AEA NON CERTIFIED DUES	$11.65	$23.30
NEA NON CERTIFIED DUES	$10.75	$21.50
VALIC ANNUITY WITHHOLDINGS	$30.00	$60.00
Total Deductions - Other	$610.42	$917.89

Employee Self Service – View Pay Checks

The check/statement detail will display as a copy of the original check/statement.
Employees can also print a copy of the displayed check/statement.

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
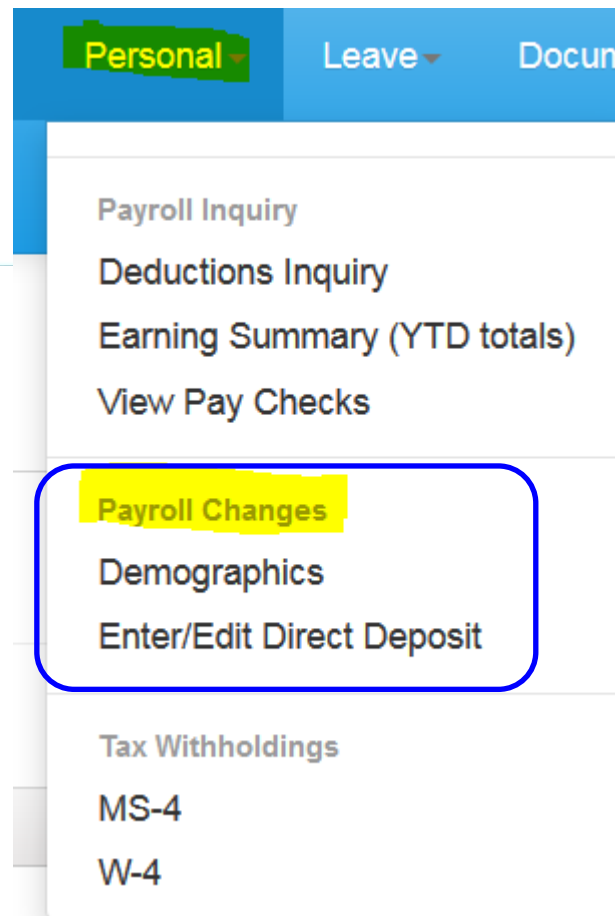
Employee Self Service - Demographics

Employees 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 an employee has a pending request, their demographics will be displayed with the requested changes.

Information can be printed by selecting Print.

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

Demographic Change Request

Pending

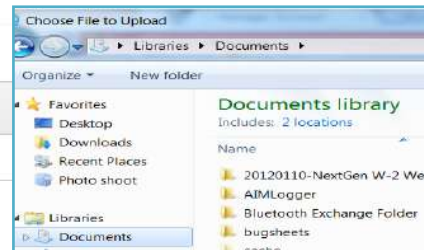Save   Back   Print

User Instructions

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.

Field	Value	Field	Value
First Name	B	Middle Name	
Last Name	ANDY	Birthday	
Email	ANDY_B@HARRISSCHOOL.ORG	Gender	Female
Address 1	P. O. BOX	Address 2	42 STREET
City	BAY SAINT LOU State	MS	Zip Code 39520-1032
Home Phone		Cell Phone	

Attachments

Select files...

Welcome Scan.jpg

Choose File to Upload

Libraries ▸ Documents ▸

Organize ▾   New folder

★ Favorites
  ■ Desktop
  ⬇ Downloads
  ⬚ Recent Places
  ⬚ Photo shoot

▲ Libraries
  ▷ Documents

Documents library
Includes: 2 locations

Name
  ⬚ 20120110-NextGen W-2 Web
  ⬚ AIMLogger
  ⬚ Bluetooth Exchange Folder
  ⬚ bugsheets

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.

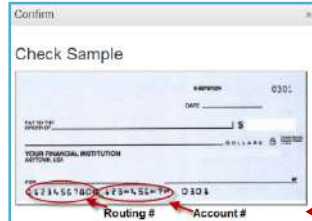# *Employee Self Service-Edit/Enter Direct Deposit*

Employees can submit requests to add, delete, or change direct deposit accounts. All changes must be validated with a PIN that is emailed to the employee's ESS email. Once the valid PIN is submitted, the request for changes will be submitted for approval.

Edit Direct Deposit Account(s)

Bank Name	Account	Routing	Account Type	Primary	Amount	
ALABAMA ONE CREDIT UNION	424:	262277189	Checking	true	$0.00	× Delete
ALABAMA ONE CREDIT UNION 2	521:	262277189	Checking	false	$25.00	× Delete

Enter PIN

Enter Valid PIN

Submit

nextgeness@gmail.con.

[EXTERNAL] Direct Deposit Validation PIN

Your validation PIN

9140

Where do I find bank account and routing numbers?

Save

If changing a routing number, click in the field, make the change and click save.
If adding a new account, click on *Add New Record*, enter the information for the new account and click save. 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 save.

Employee Self Service-Edit/Enter Direct Deposit

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

If an employee has a pending request, their direct deposit information will be displayed with the requested changes. Employees 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
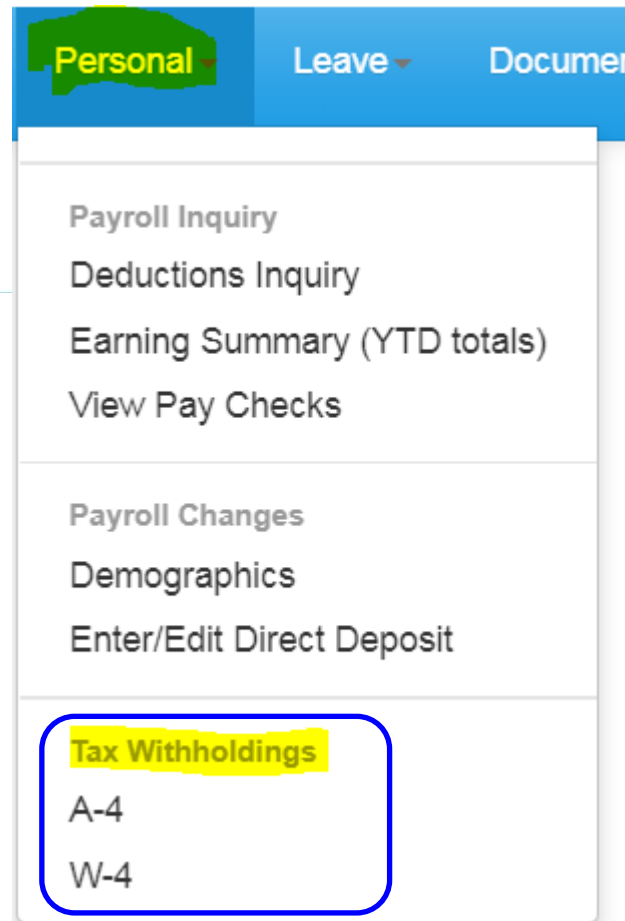
Employee Self Service – G4 (Georgia)

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

Employee's current State withholding information is displayed.

Employees 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 – 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	☐
State	Single	0	0.00	☐

Save   Back

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

Form **W-4**

Department of the Treasury
Internal Revenue Service

Employee's Witholding 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.

www.irs.gov/pub/irs-pdf/fw4.pdf

IRS.GOV W4 WorkSheet Application

OMB No. 1545-0074

2016

IRS instructions and worksheet are accessible from W4 form.

1. Your first name and middle initial   Last Name   2. Your social security number
DEEDEE S   COOKER   XXX-XX-

Home address(number and street or rural route) Address   3   Single ▼

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

City or town, state, and ZIP code   If your last name differs from that shown on your social security card,
WEST BLOCTON, AL 35184   check here. You must call 1-800-772-1213 for a replacement card. ▶ ☐

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

5. Total number of allowances you are claiming (from line H above or from the applicable worksheet on page 2)   5   0

6. Additional amount, if any, you want withheld from each paycheck   6 $ 100.00

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/Adrress
County Board of Education   Office Code(optional)   Employer FEIN
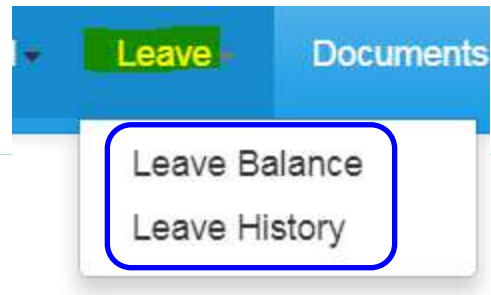
Electronic signature and date must be exactly as displayed – no extra spaces, dashes or periods.

Employee Self Service – Leave

The Leave Menu allows an employee to see their leave history and leave balances

Employee Self Service – Leave Balance

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

Leave Balance Summary - 2019

Back   Print

User Instructions

Please note that the balance listed below does not include the any absences taken during the current pay period. You must have a Sick Leave balance in order to convert Sick Leave to Personal Leave.

Description	Hrs/Days	Accum. Rate	Prior Yr. Bal.	Current Earned	YTD Used	Balance	
1 - SICK LEAVE - 12 MNTH CNTRL OFC CL	D	15	60	6.25	1	65.25	
2 - PERSONAL LEAVE - 12 MNTH CNTRL OFC CL	D	3	0	3	0	3	

Employee Self Service – Leave History

Employees can view and print their detailed leave history for a specific date range. Leave adjustment are displayed with the notes that related to the leave adjustment.

Leave History

Back   Print

Start Date

1/1/2015

End Date

12/10/2019

Date	Hrs/Days	Description	Note	Used
06/16/2...	D	SICK LEAVE		1.00
08/28/2...	D	SICK LEAVE		1.00
09/08/2...	D	PERSONAL LEAVE		0.25
10/02/2...	D	SICK LEAVE		1.00
01/05/2...	D	SICK LEAVE		0.50
03/08/2...	D	SICK LEAVE		0.50
12/13/2...	D	SICK LEAVE		0.50
12/18/2...	D	PERSONAL LEAVE		0.25

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: POLK SCHOOL DISTRICT

Product Version: 2.22.1.27

Accounting System: NextGen

Accounting System Version: 2

If you are having issues or need assistance with the ESS portal, please contact Human Resources at (770) 748-3821or by email at David.Robinson@polk.k12.ga.us or Amy.Brown@polk.k12.ga.us.

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Employee Self Service – Manage Account

Employees can manage their ESS account by clicking on their user name in the toolbar

Hello, rsmith   Log Off

Manage Account.

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

Change account   Back

Employee clicks on their user name to manage their account.

Change password

Current password

New password

Confirm new password

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

Employee Information

Employee Number

User Name   rsmith

First Name   ray

Last Name   Smith

Email   rsmith@harrischools.org

No Alert Emails

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.

Employee Self Service – Manage Account

Any changes made in Manage Account must be validated with a PIN that is emailed to the employee's ESS email. Once the valid PIN is entered and submitted, the changes to the employee's account will be saved.

Employee Self Service

If you have any questions or need assistance, please contact:

David Robinson
Director of Human Resources
david.robinson@polk.k12.ga.us

Amy Brown
Administrative Assistant
amy.brown@polk.k12.ga.us

(770) 748-3821