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# Introduction

In order for you to be able to access the Admin Module, you should first register yourself on Employee Self Service (or have your ReadyPay contact set up a non-employee Admin login for you through ReadyPay Online). Next, access ReadyPay Online. If you do not have access, your ReadyPay contact can access the ESS User Administration area for you. Your name should be found in the list of employees and 'Employee Role' will be showing next to it. Click on the role and select 'Admin' from the pull-down menu that appears. Then click the disk button to save. You will then be able to log back into Self Service to see the Admin module.

## System Navigation

**Pay-Net Solutions Inc (9000) ▾**

<b>HOME</b>	<b>PERSONAL</b>	<b>TIME OFF</b>	<b>TIME CARDS</b>	<b>PAY HISTORY</b>	<b>CHANGES</b>	<b>MANAGEMENT</b>	<b>APPROVAL</b>	<b>ADMIN</b>	<b>ONBOARDING</b>
<b>DEMOGRAPHICS</b>	<b>DEPT/POSITION</b>	<b>DEPENDENTS</b>	<b>EMERGENCY CONTACTS</b>	<b>TAXES</b>	<b>DIRECT DEPOSITS</b>	<b>DEDUCTIONS</b>	<b>PAY RATES</b>		

---

<b>Name</b> Last Name <input type="text" value="Johnson"/> First Name <input type="text" value="Hank"/> Middle Initial <input type="text" value="Williams"/> Salutation <input type="text" value="Mr"/> Nickname <input type="text"/> Prior Last Name <input type="text"/>	<b>Personal Information</b> SSN <input type="text" value="458-63-4795"/> Birth Date <input type="text" value="06/25/1975"/> Gender <input type="text" value="Male"/> Ethnicity <input type="text" value="White"/> Marital Status <input type="text" value="Single"/> Disability <input type="text"/> Veteran Status <input type="text"/>
<b>Address</b> Address 1 <input type="text" value="9863 Cider Rd"/> Address 2 <input type="text" value="#A02"/> City <input type="text" value="Atlanta"/> State <input type="text" value="Georgia"/> Zip <input type="text" value="30318"/> County <input type="text"/> Country <input type="text"/>	<b>Contact Info</b> Home Phone <input type="text" value="(858) 695-4214"/> Work Phone <input type="text"/> Ext <input type="text"/> Cell Phone <input type="text" value="(858) 268-4515"/> Work Email <input type="text"/> Personal Email <input type="text" value="hlee@pay-net.net"/>

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Kiosk © 2016 All rights Reserved 1.3.10255.0 Remember Location

<Figure I.A>

Navigating through system is accomplished through the use of icons along the top of the screen for each module of the application.

### Icons

	<b>View :</b> Opens the chosen entry for display on the screen		<b>Save :</b> Saves entries made on page
	<b>Run (Preview) Report :</b> Processes selected report and will display on the screen for printing or saving		<b>Add :</b> Opens a new line entry on the page for further coding
	<b>Edit :</b> Opens an entry for editing/updating		<b>Undo :</b> Reverts a page back to its last saved entries
	<b>Document :</b> Opens the selected document or link		<b>Delete :</b> Removes an entry from a page
	<b>Important Document :</b> Opens the selected document deemed important by the company		<b>Document :</b> Opens the selected document or link
	<b>Search :</b> Opens the selected document or link		<b>Information Alert :</b> Notifies the user of information about the field; opens the selected document or link

## 1: Home

---

Upon entering the system, you are brought to the Home module. This area houses check information, helpful websites provided by your employer and access to update your user settings/account.

## 1.1 Last Check

Your most recent check will be highlighted in the listing and details about the check show in the lower portion of the screen. Each check date, your paycheck information will update providing you the means to see the details behind the calculation of your check as well as the option to print the statement/voucher as well.

**Pay-Net Solutions Inc (9000) ▾**

HOME PERSONAL TIME OFF TIME CARDS PAY HISTORY CHANGES MANAGEMENT APPROVAL ADMIN ONBOARDING

LAST CHECK LINKS & DOCUMENTS ACCOUNT SETTINGS MOBILE ACCESS SETUP CUSTOM DATA

Show all checks for: 2016 | 2015 | 2014 | 2013 | 2012 | 2011 | 2010 | 2009 | 2008 | 2007 | 2006 | 2005 | 2004 | 2003

Print	View	Check Date	Pay Type	Hours	Gross	Dir Dep	Net Pay	Check No/Voucher
		01/15/2016	Regular	0.00	400.00	1172.66	1172.66	

**Check Information**

Check Number:  Period Begin: 12/28/2015 Net Pay: 1172.66  
 Paid On: 01/15/2016 Period End: 01/10/2016 Net Check: 0.00

Earnings				Deductions		
Earning	Description	Hours	Amount	Deduction	Description	Amount
Auto	Auto Allowance	0.00	400.00	05	Expense Reimbursement	-1000.00
<b>Totals</b>		<b>0.00</b>	<b>400.00</b>	102	test	10.00
				30	125 Medical Blue Cross HMO	150.00
				31	125 Medical Kaiser	23.33
				32	125 Dental Nationwide	5.00
				Aflac - Hospital	Aflac - Hospital	2.22
				<b>Totals</b>		<b>-809.45</b>

Employee Taxes				Employer Taxes			
Tax	Description	Taxable	Amount	Tax	Description	Taxable	Capped
CA	California SITW	219.45	0.00	CASUI	California SUI	219.45	219.45
FITW	Federal Income Tax	219.45	20.00				
MED	Medicare	219.45	3.18				
MED-HI	Medicare - Additional	219.45	0.00				
SS	OASDI	219.45	13.61				
<b>Totals</b>			<b>36.79</b>				

Direct Deposits	
Account	Amount
122000496 - XXXXXX2198	1172.66
091300010 - XXXXXX5850	50.00
	1172.66

<Figure 1.1.A>

**Year** Located above the checks listing will be multiple years (based on how much pay history has processed for you in the system). By clicking on a year, the checks paid to you for that year will display in the listing.

**Viewing Details** To see the details of a specific check, simply click on the VIEW button.

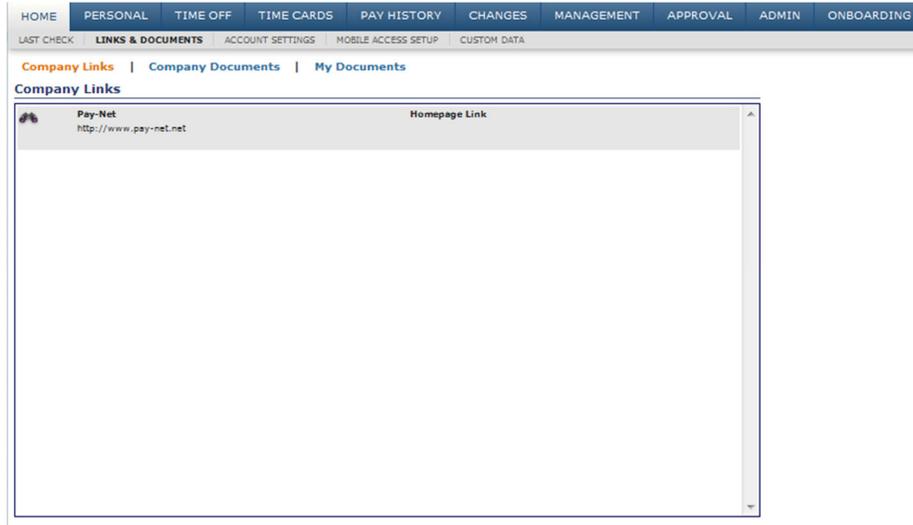
**Printing a Voucher** Click the RUN REPORT button to display a copy of the selected check stub which can either be saved to disk/computer or printed.

## 1.2 Links & Documents

Information may be provided to you and your employees (by a payroll-system contact) with specific websites that you may find useful and documents relevant to your employment.

**Links** Each Link shown on the screen is an external website you may click (on the icon) to see. Examples might be to look up a doctor who takes your insurance or to see other software applications you may need to use such as a timekeeping system.

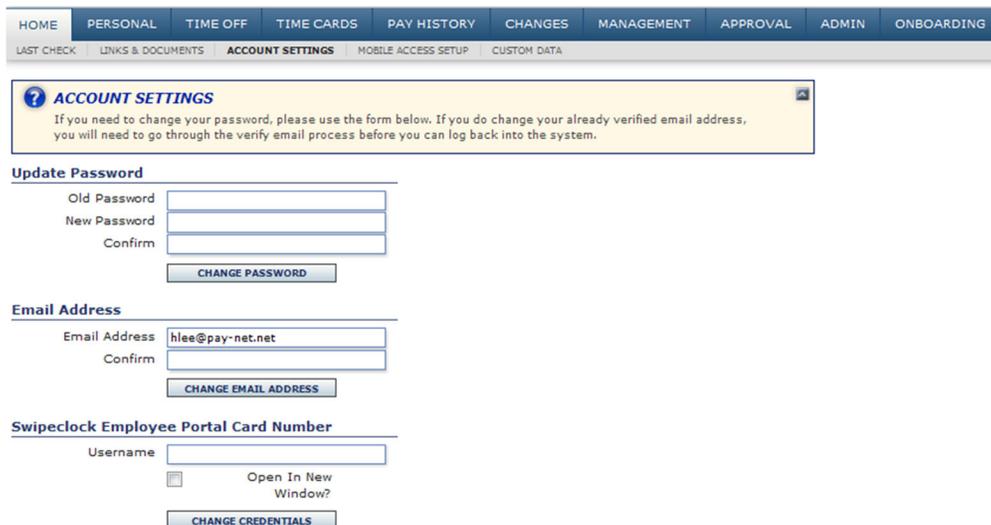
**Documents** Change forms, direct deposit forms, employee handbooks or other employee-relevant information may be displayed here.



<Figure 1.2.A>

### 1.3 Account Settings

At any time, you may update your Self Service password and email address (if email address was required during registration). If your employer has provided you with access to other payroll-related software, you may enter your logins for those here also to allow for single sign-on. Single sign-on allows you to toggle between Self Service and that specified product by clicking any available icons for Benefits or Time and Attendance.



<Figure 1.3.A>

# 2: Personal

The Personal Module allows you to view information your company has stored for you in the payroll system, not all of which affects payroll directly. Here you can view things like your address, pay rates, deductions, taxes and direct deposits.

## 2.1 Demographics

Home of the most basic employee information, housed here are your legal name, address, contact information and other personal data.

The screenshot displays a web-based interface for the Personal Module. At the top, there is a navigation bar with tabs: HOME, PERSONAL (selected), TIME OFF, TIME CARDS, PAY HISTORY, CHANGES, MANAGEMENT, APPROVAL, ADMIN, and ONBOARDING. Below this is a secondary navigation bar with tabs: DEMOGRAPHICS (selected), DEPT/POSITION, DEPENDENTS, EMERGENCY CONTACTS, TAXES, DIRECT DEPOSITS, DEDUCTIONS, and PAY RATES.

The main content area is divided into several sections:

- Cost Centers:** A table with columns: Level, Cost Center, Supervisor?, Default Supervisor, and Override Supervisor. The rows show Dept (100 - Oceanside), Bus Unit (100 - Administration), and Class (002 - Supervisor). There are checkboxes for Supervisor? and Default Supervisor, and dropdown menus for Override Supervisor.
- Pay:** Fields for Pay Group (N/A), Clock / Badge #, and Tipped (Not Tipped).
- Transfers:** Fields for Change Date and Change Reason.
- Position:** Fields for Position, Supervisor, Title, EEO Class (N/A), Work Comp (8810 - Office / Clerical), Benefit Class, OT Exempt, and Officer.
- Union:** Fields for Union, Application Date, Initiation Collected?, and Dues Collected?.

At the bottom left, there is a **SAVE** button, and at the bottom right, there is an **UNDO** button.

<Figure 2.1.A>

## 2.2 Dept/Position

The information housed on this screen is primarily used by your employer to track information about the job you are assigned to do and who you report to.

The screenshot shows the 'DEPT/POSITION' screen with the following sections:

- Cost Centers:** Includes fields for Level (Dept, Bus Unit, Class), Cost Center (dropdown), Supervisor? (checkbox), Default Supervisor (text), and Override Supervisor (dropdown).
- Pay:** Includes Pay Group (dropdown), Clock / Badge # (text), Tipped (dropdown), Change Date (text), and Change Reason (text).
- Position:** Includes Position (dropdown), Supervisor (dropdown), Title (text), EEO Class (dropdown), Work Comp (dropdown), Benefit Class (dropdown), OT Exempt (checkbox), and Officer (checkbox).
- Union:** Includes Union (dropdown), Application Date (text), Initiation Collected? (checkbox), and Dues Collected? (checkbox).

Buttons at the bottom include 'SAVE' and 'UNDO'.

<Figure 2.2.A>

## 2.3 Dependents

Typically specified when enrolling in insurance and benefits, the dependents you specify may be stored in the system by your employer for reporting purposes. They would be stored here.

The screenshot shows the 'DEPENDENTS' screen with the following sections:

- Table:** A table with columns: Last Name, First Name, DOB, Relationship, Phone. The table is currently empty with the text 'No records to display.'
- Dependents Form:** Includes fields for First Name, Middle Name, Last Name, Relationship (dropdown), Gender (dropdown), Address 1, Address 2, City, State (dropdown), Zip, Country, SSN, Birth Date, Smoker (checkbox), and Telephone.

Buttons at the bottom include 'SAVE', 'ADD', 'UNDO', and 'DELETE'.

<Figure 2.3.A>

## 2.4 Emergency Contacts

It may be necessary for your employer to contact someone in case you are injured or sick on the job. Your employer may choose to store this information on this tab.

Contact Name	Relationship	Home Phone	Work Phone
Jane Doe	Mother	8581231234	

**Emergency Contact Information**

Name: Jane Doe  
 Relationship: Mother  
 Home Phone: 8581231234  
 Work Phone:

Address 1:   
 Address 2:   
 City:   
 State:  Zip:   
 Country:

SAVE ADD UNDO DELETE

<Figure 2.4.A>

## 2.5 Taxes

Anytime you update your W4 (tax elections), your employer will update the payroll system so your most recent elections are displayed here. From this screen, you can pull up a “dummy” copy of your existing W4 based on the information that is displayed. To do this, simply click on the RUN REPORT button next to the tax code.

If you need to change your elections, you may click on the EDIT button and a W4 will be displayed with your demographic information already filled in. You can then print the form, fill out the remainder and return it to your employer.

If your employer has stored tax changes as history (by using begin and end dates) you can see the history by marking the box to ‘Include Inactive Tax Records’ above the tax code listing.

Include Inactive Tax Records

Tax Code	Description	Filing Status	Exemptions	Tax Information	Is Active
CA	California SITW	M	2.00		True
FITW	Federal Income Tax	M	2.00		True

**Tax Information**

Tax Type: State Withholding Tax  
 Filing Status: M - Married  
 Start Date: 01/07/2011  
 End Date: 12/31/2100

Primary Exemptions: 2  
 Additional Exemptions: 0  
 Additional Amount: 0.00  
 Percent of Gross: 0.00

SAVE UNDO DELETE

<Figure 2.5.A>

## 2.6 Direct Deposits

As you change bank accounts or add one, your employer will update the payroll system so your most recent direct deposit accounts and elections are displayed here. From this screen, you can pull up a “dummy” copy of your direct deposit election form based on the information that is displayed. To do this, simply click on the RUN REPORT button next to the account.

If your employer has stored direct deposit changes as history (by using begin and end dates) you can see the history by marking the box to ‘Include Inactive Direct Deposits’ above the accounts listing.

The screenshot shows the 'DIRECT DEPOSIT' section of a web application. At the top, there is a navigation bar with tabs for HOME, PERSONAL, TIME OFF, TIME CARDS, PAY HISTORY, CHANGES, MANAGEMENT, APPROVAL, ADMIN, and ONBOARDING. Below this is a sub-navigation bar with tabs for EMPLOYEE SEARCH, EMPLOYEE PERSONAL, EMPLOYEE TIME OFF, TIME OFF MANAGEMENT, APPLICATIONS, ACA AVG HOURS, ACA HOURS, and ACA PROJECTION. The main content area is for employee 'Robertson, Thomas R.' and includes a search bar and a checkbox for 'Active Employees Only?'. A 'DIRECT DEPOSIT' information box contains a link to a 'Direct Deposit Authorization Form'. Below this is a checkbox for 'Include Inactive Direct Deposits' and a table with columns: Priority, Routing, Account, Type, Amount, and Is Active. The table currently shows 'No records to display.' At the bottom, there is a 'Direct Deposit' form with fields for Priority (99), Routing No., Bank Name, Account No., Re-enter Acct No., Account Type (Checking), Start Date (02/25/2016), and End Date (12/31/2100). There are also radio buttons for 'Do you want your entire check deposited to this account?' (Yes/No) and a 'Flat Amount' field set to 0.00.

<Figure 2.6.A>

To sign up for electronic vouchers (i.e. paperless pay stubs), read through and acknowledge the Direct Deposit Authorization.

The screenshot shows the 'Direct Deposit Authorization' form. It includes a 'Direct Deposit' section with fields for Priority (99), Routing No., Bank Name, Account No., Re-enter Acct No., Account Type (Checking), Start Date (02/25/2016), and End Date (12/31/2100). There are also radio buttons for 'Do you want your entire check deposited to this account?' (Yes/No) and a 'Flat Amount' field set to 0.00. Below this is a 'Direct Deposit Authorization' section with the following text: 'I hereby authorize Pay-Net Solutions Inc to provide for direct deposit any salary or wages due me, less any mandatory or authorized withholding or deductions therefrom, in the above designated account. If at any time the amount of salary or wages so deposited exceeds the amount of salary or wages actually due and payable to me, I hereby authorize Pay-Net Solutions Inc to either: a. Withhold a sum equal to the overpayment from future salary or wages; or b. Recover such overpayment from the above-designated account. If Pay-Net Solutions Inc is legally obligated to withhold any part of my wage or salary payment for any reason, or if I no longer meet eligibility requirements for the Direct Deposit program, I understand Pay-Net Solutions Inc may terminate my enrollment in the program. If any action taken by me results in nonacceptance of a direct deposit by the designated financial institution, I understand Pay-Net Solutions Inc assumes no responsibility for processing a supplemental salary or wage payment until the amount of the nonacceptance deposit is returned to Pay-Net Solutions Inc by the financial institution.' At the bottom, there is a checkbox for 'I agree to the Direct Deposit Authorization agreement above' and buttons for SAVE, ADD, UNDO, and DELETE.

<Figure 2.6.B>

## 2.7 Deductions

The amounts being taken from your paycheck to cover items such as insurance, loans, and retirement funds will be listed here. You can see the amount being withheld, the last time it was taken, the amount withheld year-to-date (YTD) and any goal that may be set to stop the deduction.

If your employer has stored deduction changes as history (by using begin and end dates) you can see the history by marking the box to 'Include Inactive Deductions' above the deduction code listing.

<Figure 2.7.A>

## 2.8 Pay Rates

The amount being paid to you either per hour or as a salary can be found on this tab. If you get paid differing amounts based on specific work you do, you may see more than one rate listed. With each one, you can see if the rate is applied when working a specific job or in a specific department. Also listed under the Employee Pay Settings is your pay/tax frequency and hours associated with your salary, if applicable.

If your employer has stored rate changes as history (by using begin and end dates) you can see the history by marking the box to 'Include Inactive Rates' above the rates listing.

<Figure 2.8.A>

# 3: Time Off

## Time Off Balance

Displayed here are your balances of paid time off such as sick or vacation time, if your employer is tracking that information through the payroll system. On top of seeing your available time off balance, you can see the time used and any probation time if you are a new employee and cannot use your balance right away.

The screenshot shows a web application interface for viewing time off balances. At the top, there is a navigation menu with tabs: HOME, PERSONAL, TIME OFF (selected), TIME CARDS, PAY HISTORY, CHANGES, MANAGEMENT, APPROVAL, ADMIN, and ONBOARDING. Below the navigation, there are sub-tabs: TIME OFF REQUESTS, TIME OFF HISTORY, and TIME OFF BALANCE (selected). The main content area features a table with the following data:

PTO Class	Description	Avail Hours	Hours Used	Last Accrued
PTO	Personal Time Off	80.00	0.00	02/12/2016
Vac	Vacation	55.44	0.00	02/12/2016

Below the table, there is a section titled "PTO" with a dropdown menu for "PTO Class" set to "Personal Time Off" and a "Last Accrue Date" field set to "02/12/2016". To the right, a "Balance" section displays a summary table:

	Hours	Dollars
Available	80.00	0.00
Used	0.00	0.00
Total	80.00	0.00
Probation	0.00	

<Figure 3.1.A>

## Time Off Requests

Self Service has functionality that allows you to request time off through the system. This typically is used by employers who do not have the request process built into their timekeeping systems.

To request time off, access the Time Off Module and you will see the Time Off History tab. Click on the type of request you would like to make and complete the request in the box that appears. Then click SAVE to submit for approval. You can stop a request by clicking the DELETE button so long as the request hasn't been acted upon by an approver. If you used an email address during Self Service registration, you will receive an email letting you know if your request was approved or declined.

The screenshot displays the 'TIME OFF REQUESTS' section of a web application. At the top, there is a navigation bar with tabs: HOME, PERSONAL, TIME OFF, TIME CARDS, PAY HISTORY, CHANGES, MANAGEMENT, APPROVAL, ADMIN, and ONBOARDING. Below this, there are sub-tabs: TIME OFF REQUESTS, TIME OFF HISTORY, and TIME OFF BALANCE. Three buttons are visible: 'Request Partial Day Off' (blue border), 'Request Day Off' (green border), and 'Request Vacation' (yellow border). Below these buttons is a table titled 'Time Off Requests' with columns: Status, Request, Dates, and Comments. The table contains two rows of pending requests. Three arrows point from the buttons to three separate request forms below. The first form (blue border) is for 'Request Partial Day Off', the second (green border) is for 'Request Day Off', and the third (yellow border) is for 'Request Vacation'. Each form includes fields for Date, Amount of Time, Personal Time, and Notes, along with SAVE and CANCEL buttons. The 'Request Vacation' form also includes a calendar for selecting dates.

Status	Request	Dates	Comments
<span style="color: red;">✘</span> <span style="color: yellow;">●</span> PENDING	PTO 8.00	02/22/16	Request Created by Hank Adams Jr
<span style="color: red;">✘</span> <span style="color: yellow;">●</span> PENDING	PTO 24.00	02/22/16 - 02/24/16	

<Figure 3.1.B>

## Time Off History

Displayed here is your time off history. You can review past requests, time off used, etc. You can narrow the results displayed by time off type and/or certain date ranges.

**TIME OFF HISTORY**  
Use the drop downs to filter your results

PTO Class  Year  From  To

PTO Class	Date	Earned (Hrs)	Used (Hrs)	Balance (Hrs)	Earned (\$)	Used (\$)	Balance (\$)
PTO	02/12/2016	0.00	0.00	80.00	NA	NA	NA
Vac	02/12/2016	4.62	0.00	55.44	NA	NA	NA
PTO	01/29/2016	0.00	0.00	80.00	NA	NA	NA
Vac	01/29/2016	4.62	0.00	50.82	NA	NA	NA
Vac	01/25/2016	0.00	0.00	46.20	NA	NA	NA
PTO	01/15/2016	0.00	0.00	80.00	NA	NA	NA

**Details**

PTO Class	Date	Type	Used (Hrs)	Balance (Hrs)	Used (\$)	Balance (\$)
Vac	02/12/2016	Pre-Clearing Usage	0.00	50.82	NA	NA
Vac	02/12/2016	Earn	4.62	55.44	NA	NA

<Figure 3.1.C>

# 4: Pay History

## Check History

As your paychecks become available online, they are placed into this area for viewing and for printing stubs (just as you can in the Home > Last Check screen). From this screen, you can look at YTD amounts and be able to print a report based on the totals.

View	Check Date	Pay Type	Hours	Gross	Dir Dep	Net Pay	Check / Voucher #	Totals
	02/12/2016	Reg	80.00	2080.00	0.00	1691.42	7912	Hours: 240.00 Gross: 6240.00 Net Pay: 5090.32 Direct Deposits: 0.00 Deductions: 0.00 Taxes: 1149.68
	01/29/2016	Reg	80.00	2080.00	0.00	1691.42	7894	
	01/15/2016	Regular	80.00	2080.00	0.00	1707.48	7872	

Earnings		Deductions				
Earning	Description	Hours	Amount	Deduction	Description	Amount
O1	Regular	240.00	6240.00			
<b>Totals</b>		<b>240.00</b>	<b>6240.00</b>			

Employee Taxes				Employer Taxes			
Tax	Description	Taxable	Amount	Tax	Description	Taxable	Capped
CA	California SITW	6240.00	86.33	CAETT	CA Edu & Training	6240.00	6240.00
CASDI-E	CA SDI - Employee	6240.00	56.16	CASUI	California SUI	6240.00	6240.00
FITW	Federal Income Tax	6240.00	\$29.83	FUTA	Fed Unemployment	6240.00	6240.00
MED	Medicare	6240.00	90.48	MED-R	Medicare - Employer	6240.00	6240.00
MED-HI	Medicare - Additional	6240.00	0.00	SS-R	OASDI - Employer	6240.00	6240.00
SS	OASDI	6240.00	386.88				
<b>Totals</b>			<b>1149.68</b>				

Direct Deposits	
Account	Amount

<Figure 4.1.A>

**Year** Located to the right of the checks listing will be multiple years (based on how much pay history has processed for you in the system). By selecting a year in the drop-down menu, the checks paid to you for that year will display in the listing and be totaled at the bottom of the page.

**Printing a Voucher** Click the RUN REPORT button next to the specific check date to display a copy of the check stub which can either be saved to disk/computer or printed.

**Printing Details** Click the RUN REPORT button under the Totals section to display a Compensation Detail report which can either be saved to disk/computer or printed. This report provides per check information and totals by each quarter of the selected year.

Compensation Detail													Onepoint Solutions		Company (9000)		Page 1						
<b>Johnson, Hank W</b>													Id		7		Pay Freq	B		Fed Tax Status		M-2 +\$20.00	
9863 Cider Rd													SSN		458-63-4795		Salary		2,307.69 (02/12/2016)		State Tax Status		CA S-1
Atlanta, GA 30318													Loc		100-300-003		Hire		05/15/98		SUI State		CA
Check Date	Hours			Earnings			Taxes			Deductions	Net Pay												
	Reg	OT	Other	Reg	OT	Other	Gross	FITW	FICA			State	Other										
<b>Reporting Year: 2016</b>																							
01/15/2016	0.00	0.00	0.00	0.00	400.00	400.00	20.00	16.79	0.00	0.00	-809.45	1,172.66											
01/25/2016	0.00	0.00	2.00	0.00	20.00	20.00	18.47	1.53	0.00	0.00	0.00	0.00											
01/29/2016	0.00	0.00	80.00	0.00	2,400.00	2,400.00	221.19	169.78	36.61	0.00	1,190.55	781.87											
02/12/2016	0.00	0.00	80.00	0.00	2,707.69	2,707.69	267.34	193.33	50.15	0.00	1,190.55	1,006.32											
02/25/2016	0.00	0.00	80.00	0.00	2,307.69	2,307.69	230.92	174.75	39.47	0.00	23.33	1,839.22											
02/26/2016	0.00	0.00	80.00	0.00	2,707.69	2,707.69	267.34	193.33	50.15	0.00	1,190.55	1,006.32											
03/11/2016	0.00	0.00	80.00	0.00	2,707.69	2,707.69	267.34	193.33	50.15	0.00	1,190.55	1,006.32											
03/25/2016	0.00	0.00	80.00	0.00	2,758.63	2,758.63	287.34	196.89	131.24	0.00	1,194.99	948.17											
<b>1st Qtr 16</b>	<b>0.00</b>	<b>0.00</b>	<b>482.00</b>	<b>0.00</b>	<b>16,009.39</b>	<b>16,009.39</b>	<b>1,579.94</b>	<b>1,139.73</b>	<b>357.77</b>	<b>0.00</b>	<b>5,171.07</b>	<b>7,760.88</b>											
<b>Totals</b>	<b>0.00</b>	<b>0.00</b>	<b>482.00</b>	<b>0.00</b>	<b>16,009.39</b>	<b>16,009.39</b>	<b>1,579.94</b>	<b>1,139.73</b>	<b>357.77</b>	<b>0.00</b>	<b>5,171.07</b>	<b>7,760.88</b>											

<Figure 4.1.A>

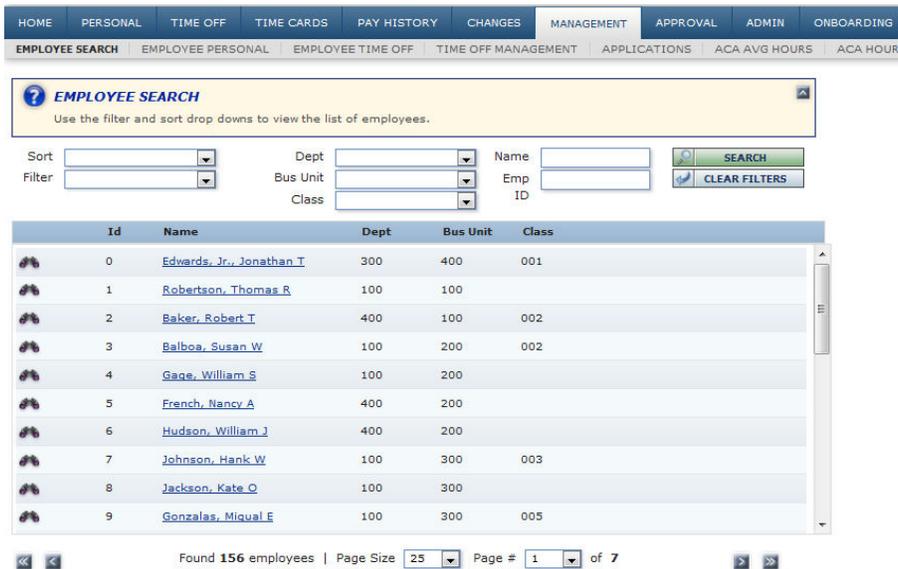
\*\* There may be an additional tab in this Module that you can access. Please see details in section '6: Additional Features' of this document. \*\*

# 5: Management

For each area an employee can change, you as an administrator can change the same fields on their records as well. Along with those rights, you may also grant yourself access to issue pay rate changes and to approve time off requests as well.

## 5.1 Employee Search

You can search for an employee by filtering for certain information. You can create an on-screen view of employee lists based on specified criteria.



<Figure 5.1.A>

The following criteria can be used to filter your employee list:

**Sort** You can list the employees in a specific order. By default, all employees will be in alphabetical order. The list of preset sorts includes employee ID, department, social security number, and employee status.

**Filter** Used in conjunction with the Sort function, the Filter allows you to select a specific group of employees. For instance, in Sort, you can select 'Name.' In Filter, you can limit the employee list to only 'Active Employees'. The returned list of employees will be all active employees in alphabetical order. All Filters are customizable.

**Cost Center** You can limit your employee list to include only the employees in a cost center, based on your selections in the Branch and Department dropdown lists (level of department structure). Keep in mind, a company can have five levels of cost center structure and each would be selectable here.

**Name** You can search your available employees for a specific name(s) by typing the full or portion of the name. Your employee list will then reflect anyone meeting your search term.

**Emp ID** You may search your available employees for a specific employee identification number by typing it in the Emp ID field. Any employee whose ID contains your search term will be displayed in the search results.

## 5.2 Employee Personal

You have access to change fields on your employees' records through this area. The fields they have access to change in Self Service are the same fields you can access as well. You'll have access to Demographics, Dependents, Emergency Contact, Taxes, Direct Deposit, and Pay Rates (which cannot be changed by the employee). Just above the tab listing is an employee search function to jump to another employee. Simply begin typing the employee's name in the box or click on the down blue arrow to pull down a list of your employees.

The screenshot shows the 'Employee Personal' record for Hank Williams Johnson. The interface includes a navigation bar with tabs like HOME, PERSONAL, TIME OFF, etc. Below the navigation is a search bar for employees and a list of tabs: Demographics, Dept/Position, Dependents, Emergency Contacts, Taxes, Direct Deposit, Deductions, and Pay Rates. The 'Personal Information' section contains fields for Last Name (Johnson), First Name (Hank), Middle Initial (Williams), Salutation (Mr), and Nickname. It also includes fields for SSN (458-63-4795), Birth Date (06/25/1975), Gender (Male), Ethnicity (White), Marital Status (Single), Disability, and Veteran Status. The 'Address' section includes Address 1 (9863 Cider Rd), Address 2 (#A02), City (Atlanta), State (Georgia), and Zip (30318). The 'Contact Info' section includes Home Phone ((858) 695-4214), Work Phone, Cell Phone ((858) 268-4515), Work Email, and Personal Email (hlee@pay-net.net). There are 'SAVE' and 'UNDO' buttons at the bottom.

<Figure 5.2.A>

To perform a pay increase on an employee (if given the access); click on the PAY RAISE button at the bottom of the Pay Rates area. In the pop-up box, select the Pay Raise Type, Effective date of the raise, the Raise Amount (based on the Type elected), and then click APPLY RAISE. You will then be able to set any allocations on the main Pay Rates screen. Be sure to click SAVE when complete.

The screenshot shows the 'Pay Rates' area for Robert T Baker. The main interface displays a table of rate codes and their corresponding rates. A 'PAY RAISE' pop-up box is open, showing the 'Current Rate/Salary' for Rate Code 2 (Rate 10.00, Salary 0.00). The 'Pay Raise Type' is selected as 'Select Pay Raise Type'. The 'Pay Raise Amount' section includes an 'Effective' date of 4/4/2016, a 'Raise Amount' field, and a 'Raise %' field. There are 'APPLY RAISE' and 'CANCEL' buttons at the bottom of the pop-up. The background shows the 'PAY RATES' and 'EMPLOYEE PAY SETTINGS' tabs, with the 'PAY RATES' tab active, displaying a table of rate codes and their details.

<Figure 5.2.B>

### 5.3 Employee Time Off

Displayed under Time Off Balance are your selected employee's balances of paid time off such as sick or vacation time, if your employer is tracking that information through the payroll system. On top of seeing their available time off balance, you can see the time used and any probation time if they are a new employee and cannot use their balance right away.

PTO Class	Description	Avail Hours	Hours Used	Last Accrued
PTO	Personal Time Off	80.00	0.00	03/25/2016
Vac	Vacation	36.96	0.00	03/25/2016

PTO		Balance	
PTO Class	Last Accrue Date	Hours	Dollars
Personal Time Off	03/25/2016	Available: 80.00	0.00
		Used: 0.00	0.00
		Total: 80.00	0.00
		Probation: 0.00	

<Figure 5.3.A>

You may request time off on behalf of the selected employee in the Time Off Request area, if you've set up the access. Please see section 9.3 in this document for instructions.

Request Partial Day Off   Request Day Off   Request Vacation

Status	Request	Dates	Comments
No records to display.			

<Figure 5.3.B>

## 5.4 Time Off Management

Identifying employees who were scheduled for time off is made possible in this area. On top of seeing employees who have had time approved, you can also see the employees whose have pending requests. After the date passes, you can mark if the employee actually took the time off (Yes, No, Not Sure) and if they took a different number of hours (Adjusted Hours). This information will allow you to maintain their correct time off balance. *\*\* The data located in this section can be imported into ReadyPay by running an export file through ReadyPay Online Reporting. Please see additional information sheet for instructions on this process. \*\**

The screenshot shows the 'TIME OFF MANAGEMENT' section of a web application. At the top, there is a navigation bar with tabs: HOME, PERSONAL, TIME OFF, TIME CARDS, PAY HISTORY, CHANGES, MANAGEMENT, APPROVAL, and ADMIN. Below this is a sub-navigation bar with options: EMPLOYEE SEARCH, EMPLOYEE PERSONAL, EMPLOYEE TIME OFF, TIME OFF MANAGEMENT (selected), APPLICATIONS, ACA AVG HOURS, ACA HOURS, and ACA PROJECTION. The main content area has a header 'TIME OFF MANAGEMENT' with a help icon. Below the header, there are filters for 'Pay Periods' (03/21/2016 - 04/03/2016) and 'Filter from' (03/21/2016 to 04/03/2016), along with a 'REFRESH' button. A checkbox 'Include Pending Requests' is checked. The main data is presented in a table with the following columns: Employee Name, Type, PTO Type, From, To, Did employee take Time Off?, Requested Hours, and Adjusted Hours. The table contains one row for 'Johnson, Hank' with 'Full Day' Type, 'Sick' PTO Type, '04/01/16' From, and '8.00' Requested Hours. The 'Did employee take Time Off?' column has radio buttons for 'Yes', 'No', and 'Not Sure', with 'Not Sure' selected. Below the table are 'SAVE' and 'UNDO' buttons.

Employee Name	Type	PTO Type	From	To	Did employee take Time Off?	Requested Hours	Adjusted Hours
Johnson, Hank	Full Day	Sick	04/01/16		<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Not Sure	8.00	

<Figure 5.4.A>

## 6: Changes

### Pending/Approved Changes

This area will typically not display any data unless your employer elects to allow you to make changes to your personal information as described in section 9 of this guide.

The screenshot shows the 'PENDING APPROVALS' section of a web application. At the top, there is a navigation bar with tabs: HOME, PERSONAL, TIME OFF, TIME CARDS, PAY HISTORY, CHANGES (selected), MANAGEMENT, APPROVAL, and ADMIN. Below this is a sub-navigation bar with options: PENDING CHANGES (selected) and APPROVED CHANGES. The main content area has a header 'PENDING APPROVALS' with an information icon. Below the header, there are two tabs: 'My Pending Changes' (selected) and 'My Submitted Changes'. The main data is presented in a list of pending approvals. The first entry is 'Updated Time Off (01-Apr-2016 at 12:51)' with a red 'X' icon. Below this entry is a list of details: 'added Amount of Time 8.00', 'added Benefit Type Sick', 'added Request Date 01-Apr-2016', 'added Start Date 01-Apr-2016', and 'added Time Off Type FullDay'.

<Figure 6.A>

# 7: Approval

When a request is made by an employee and it is your turn to approve the item, you will not only see an orange bar across the top of Self Service signaling the requests, but you will also have the changes shown in your Approval Module. You may click on the requests in the orange header to be taken to the Approval Module. Changes you make to your own Personal information can also show up to be approved as well.

## 7.1 Pending Approval

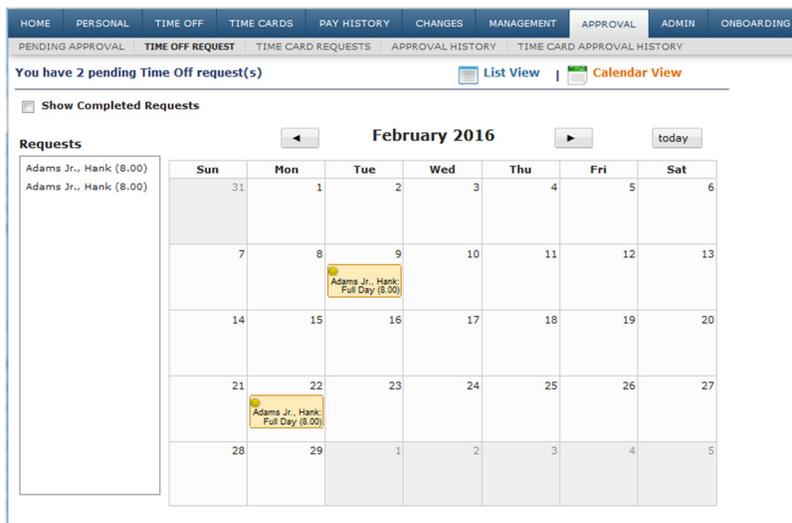
All employee record changes to be approved by you will show in this area. Each request may be made up of several fields and you have the ability to pick and choose what you want to approve and what you need to decline. By clicking a RED X button, you are declining the item. By clicking a GREEN CHECK button, you are approving. For each item you decline, you will be asked to provide a reason for your action which we be displayed for the employee in their Self Service.



<Figure 7.1.A>

## 7.2 Time Off Requests

To review the request, click on the VIEW button next to the employee's name. You may click on the Calendar View to see all employees' time off requests. In the Calendar View, there is a checkbox in the upper left-hand corner of the screen to Show Completed Requests so you may get a good view of everyone who is off on a particular day. You may click on a request (yellow item) to review the details.



<Figure 7.2.A>

Once the request is open, you will be able to review the type of request, the number of hours and dates being requested off, and what the employee's accrual balance would be should the request be approved. Any transactions regarding that particular policy will be displayed to the right of the balance information. The bottom of the screen provides a look at the days of the week the request affects.

**TIME OFF MANAGEMENT**  
 List below shows employees that have requested and have been approved to take Time Off. Please confirm whether employee *indeed* took requested Time Off and adjust number of hours taken if necessary, otherwise employee provided hours will be used when processing payroll.

Pay Periods: 03/21/2016 - 04/03/2016 Filter from 03/21/2016 to 04/03/2016 **REFRESH**

Include Pending Requests

Employee Name	Type	PTO Type	From	To	Did employee take Time Off?			Requested Hours	Adjusted Hours
					Yes	No	Not Sure		
Johnson, Hank	Full Day	Sick	04/01/16		<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	8.00	

<Figure 7.2.B>

### 7.3 Approval History

All requests that have either been approved or declined by you will be displayed in this section with the most recent being first.

**Approval History** [Show Employee Only Requests](#)

[All Types](#) | [Certifications](#) | [Covered Dependents](#) | [Demographics](#) | [Dependents](#) | [Dept/Position](#) | [Direct Deposits](#) | [Education](#) | [Emergency Contacts](#) | [Employee Insurance](#) | [Events](#) | [Licenses](#) | [Pay Rate](#) | [Skills](#) | [Taxes](#) | [Time Off](#) | [Training](#)

Prev **1** Next

Updated Adams Jr., Hank William » Time Off (09-Feb-2016) <span style="float: right;">APPROVED</span>		
Field Name	Old Value	New Value
Amount of Time		8.00
Benefit Type		Sick
Notes		family vacation
Request Date		09-Feb-2016
Start Date		09-Feb-2016
Time Off Type		FullDay

<Figure 7.2.C>

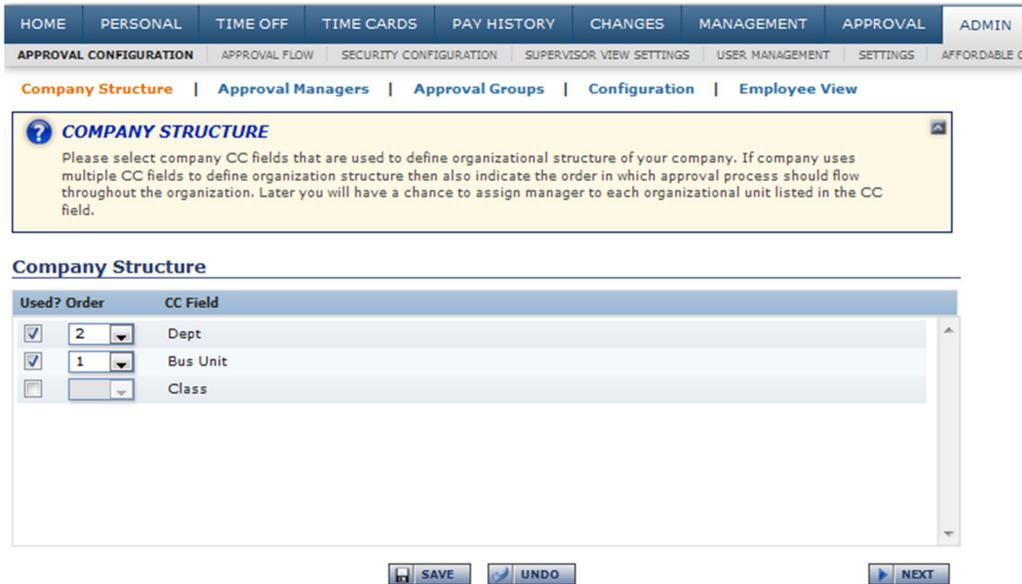
# 8: Admin

Allowing your employees to change their own information in Employee Self Service is completely defined by your role as Administrator. To allow changes, you must set up an approval process to ensure someone verifies the information being changed.

## 8.1 Approval Configuration

### Company Structure

To set up change approvals based on your company's existing cost center (department) structure, you must first select which levels are to be used in the approval process (Used?) and in what order these levels will do the approvals. It is not necessary to have managers of each level do approvals. For instance, if your top tier of structure is Division and your lowest is Department, you'd probably want changes to reach the Department managers first so they would be '1' in Order and they may be the only level to approve changes.



<Figure 8.1.A>

*\*\* If only you will be doing the approvals or your criteria for setting up a change approver isn't by your existing department structure, then you may skip this step. \*\**

## Approval Managers

If using Organization Structure, the Approval Managers area will open up for you to select the manager(s) for each cost center code. The managers must first be set up as supervisors in ReadyPay. If they are tied to the cost center in ReadyPay, they will already be displayed next to their codes in Self Service.

Code	Name
0100	0100
100	Oceanside
1601	arlanza
300	Example
400	San Diego

Supervisor	Supervisor Name	Notify?
<input type="checkbox"/>	Adams Jr., Hank	<input type="checkbox"/>
<input type="checkbox"/>	Balboa, Susan	<input type="checkbox"/>
<input type="checkbox"/>	Baxter, Reginald	<input type="checkbox"/>
<input type="checkbox"/>	Ben, Big	<input type="checkbox"/>
<input type="checkbox"/>	Gufbahlt, Iman	<input type="checkbox"/>
<input type="checkbox"/>	Jen, Normal	<input type="checkbox"/>
<input type="checkbox"/>	Woopwoop, Bark	<input type="checkbox"/>

<Figure 8.1.B>

Select the Management level pull-down menu at the top of the screen to set up the approving managers for each level of company structure. For each cost center code, mark the 'Supervisor' check box for each approving manager of that code and whether or not they should receive alerts of employee requests to be approved by marking the 'Notify?' check box. These settings allow for multiple managers to perform the approval process for a single cost center code.

## Approval Groups

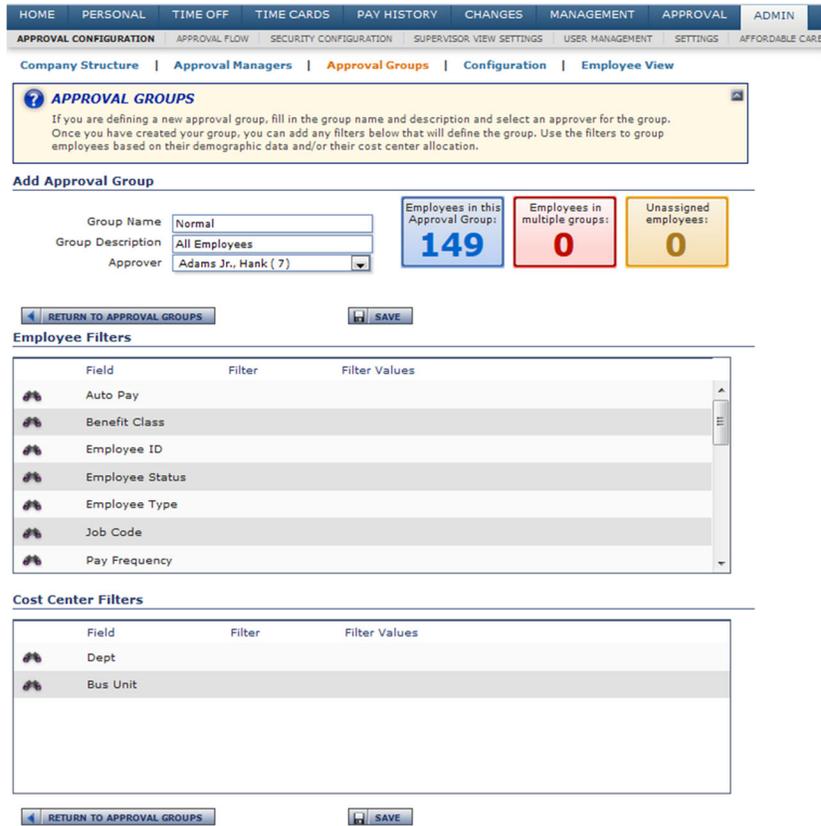
To set up change approvals based on other factors such as employee status, employee type, auto-pay type and user defined options, you should first click the ADD button to set up the new Approval Group. Enter a Name and Description for your Group. If you want someone other than an Administrator (or before the Administrator) approve changes from the group, select an Approver from the pull-down menu (list of employees in your company).

Group Name	Description	Approver
Normal	All Employees	Adams Jr., Hank

<Figure 8.1.C>

To filter your employees for the group, first select the Employee Filter. For instance, if you want to create a group for active employees, you would click on the VIEW button next to Employee Status. Your filtering options are:

- One Of** Select from available codes to form a grouping of applicable criteria
- Not One Of** Select from available codes to from a grouping of codes that do not meet your requirement
- Starts With** Allows criteria to be set using the first few characters of a field selection (ex. Using 'Sa' for Salary)
- Contains** Allows criteria to be set using any string of characters of a field selection (ex. Using 'alar' for Salary)
- Equal** Available codes used in ReadyPay will be shown to select your exact criteria



<Figure 8.1.D>

Once your group is saved, you will be able to see how many employees belong to the group, how many employees are in more than one group, and how many are not assigned in the group.



<Figure 8.1.E>

*It is possible to see Cost Center codes in the Approval Groups area as well. You may have a second person that needs to approve changes for a cost center or perhaps you do not want to set up the Approval Managers so you can include further filtering. Those approvers can be set up through Approval Groups.*

## Configuration

As a default, all screens and fields are read-only to your employees. In this tab, you are able to “open up” tabs/fields for editing by employees and secure those you don’t want them to change. There are five Personal tabs available for editing by employees; Demographics, Dependents, Direct Deposits, Emergency Contacts and Taxes. You also can allow for Time Off requests and Pay Rates changes (for managers/administrators only). To allow access for changing a tab, you should mark the check box for ‘Enable field level approval configuration’. You should also set the approval process by choosing which of the following approvals should be made in the process:

**Approval Not Required** Changes made to the tab by employees do not have to be approved

**Read Only?** No access to change fields on the tab by the employee (read further to see overrides)

**Cost Center** A cost center Approval Manager should approve the requests for the tab (will display if the Organization Structure area is in use)

**Group Admin** An Approval Group approver should approve the requests for the tab

**Admin** Any Administrator in Self Service should approve the requests for the tab

The screenshot displays the 'Configuration' page in a web application. The top navigation bar includes tabs for HOME, PERSONAL, TIME OFF, TIME CARDS, PAY HISTORY, CHANGES, MANAGEMENT, APPROVAL, ADMIN, and ONBOARDING. Below this, a secondary navigation bar lists various configuration areas: APPROVAL CONFIGURATION, APPROVAL FLOW, SECURITY CONFIGURATION, SUPERVISOR VIEW SETTINGS, USER MANAGEMENT, SETTINGS, AFFORDABLE CARE ACT, and LINKS & DOCUMENTS. The main content area is titled 'CONFIGURATION' and features a grid of buttons for different entities: CERTIFICATIONS, COVERED DEPENDENTS, DEMOGRAPHICS, DEPENDENTS, DEPT/POSITION, DIRECT DEPOSITS, EDUCATION, EMERGENCY CONTACTS, EMPLOYEE INSURANCE, EMPLOYEE TIME CARDS, EVENTS, LICENSES, PAY RATE, SKILLS, TAXES, TIME OFF, and TRAINING. Below this grid is a section for 'Enable field level approval configuration' with a checkbox and a warning icon. A table below shows the configuration for 'Taxes' with columns for Name, Override Approval?, Approval Not Required, Read Only?, Dept, Bus Unit, Group Admin, and Admin. The 'Taxes' row has a small white triangle next to its name and a checked box in the 'Admin' column. Below the table is a list of 'Approval Groups' including 'Normal' and several 'Attempt' entries. At the bottom are buttons for PREVIOUS, SAVE, UNDO, and NEXT.

<Figure 8.1.F>

Next to the tab name will be a small white triangle you can click on to expand the tab selection. Underneath you will find an area for Approval Groups and Fields where you can override the tab approval. The Approval Groups area allows you to route the approval process through different channels than just your main approver. Under Fields, you can change the approval method for a specific field by marking the check box for ‘Override Approval?’ and selecting a different approval process.

In the below example, the Administrator receives all edits for changes made to the tab by employees, but the SSN field has been checked in the 'Read Only?' column, locking that field from any edits. The Cell Phone number requires no approval, meaning the employee can edit that field at any time. The Personal Email field, however, does require approval, and will go to the Department ("Dept") manager for approval only.

Name	Override Approval?	Approval Not Required	Read Only?	Bus Unit	Dept	Group Admin	Admin
Demographics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Approval Groups							
Fields							
Address 1	<input type="checkbox"/>						
Address 2	<input type="checkbox"/>						
Birth Date	<input type="checkbox"/>						
Cell Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
City	<input type="checkbox"/>						
Country	<input type="checkbox"/>						
County	<input type="checkbox"/>						
Disability	<input type="checkbox"/>						
Ethnicity	<input type="checkbox"/>						
First Name	<input type="checkbox"/>						
Gender	<input type="checkbox"/>						
Home Phone	<input type="checkbox"/>						
Last Name	<input type="checkbox"/>						
Marital Status	<input type="checkbox"/>						
Middle Name	<input type="checkbox"/>						
Nickname	<input type="checkbox"/>						
Personal Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prior Last Name	<input type="checkbox"/>						
Salutation	<input type="checkbox"/>						
SSN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
State	<input type="checkbox"/>						
Veteran Status	<input type="checkbox"/>						
Work Phone	<input type="checkbox"/>						
Work Phone Ext	<input type="checkbox"/>						
Zip	<input type="checkbox"/>						

<Figure 8.1.G>

## Employee View

To get a snapshot of the rights you have provided your employees for making changes, you may search for an employee by entering their name or selecting them from a list. The screen will show you each tab they can see and what approvals are set for them.

**Employee Approval Configuration**

SEARCH BY NAME    SELECT FROM LIST

Please select Employee from the list below

Bond, James

**+ Employee Approval Groups (1):**

Name	Approval Not Required	Read Only?	Bus Unit	Dept	Group Admin	Admin
<b>Certifications</b>						
Certification Code (Default)		✓				
Certification Number (Default)		✓				
Description (Default)		✓				
EE Paid (Default)		✓				
ER Paid (Default)		✓				
Expires (Default)		✓				
Notes (Default)		✓				
Reimbursed (Default)		✓				
Start Date (Default)		✓				
Covered Dependents						
Demographics						
Dependents						
Dept/Position						
Direct Deposits						
Education						
Emergency Contacts						
Employee Insurance						
Employee Time Cards						
Events						
Licenses						
Pay Rate						
Skills						
Taxes						
Time Off						
Training						

PREVIOUS

<Figure 8.1.H>

## 8.2 Approval Flow

As an Administrator, you can see any approvals that have been requested by employees regardless of who is next in line to approve them. Here, you can see anything Pending, Unassigned (not in an Approval Group), Completed, and you are also given the ability to search for a transaction (historical) in Approval Search.

An Administrator can Approve or Decline a change from the Pending screen even if the change is waiting to be approved by a lower-tier manager. In other words, the Administrator has final say/complete authority.

The screenshot displays the 'Approval Flow' section of a web application. The top navigation bar includes 'HOME', 'PERSONAL', 'TIME OFF', 'TIME CARDS', 'PAY HISTORY', 'CHANGES', 'MANAGEMENT', 'APPROVAL', 'ADMIN', and 'ONBOARDING'. Below this, a sub-navigation bar shows 'APPROVAL CONFIGURATION', 'APPROVAL FLOW', 'SECURITY CONFIGURATION', 'SUPERVISOR VIEW SETTINGS', 'USER MANAGEMENT', and 'SETTINGS'. The main content area is titled 'Pending' and shows two time off requests. The first request is for 'Adams Jr., Hank William' on 2/22/2016 at 3:01:30 PM, with a 'DECLINE' button and an 'APPROVE' button. It shows a flow of approvals: 'BUS UNIT "300"' (APPROVED), 'CLASS "003"' (APPROVED), and 'ADMINISTRATOR' (WAITING...). Below this is a table with columns 'Field Name', 'Old Value', and 'New Value'. The second request is for 'Brown, Jake Bailey' on 2/22/2016 at 3:03:34 PM, also with 'DECLINE' and 'APPROVE' buttons, and shows a flow of 'WAITING...' for 'CLASS "002"', 'BUS UNIT "100"', and 'ADMINISTRATOR'. The page is submitted by 'Hank Adams Jr.' on 2/22/2016 at 3:03:34 PM.

Field Name	Old Value	New Value
Amount of Time		8.00
Benefit Type		Sick
Request Date		22-Feb-2016
Start Date		22-Feb-2016
Time Off Type		FullDay

<Figure 8.2.A>

## 8.3 Security Configuration

### General Info

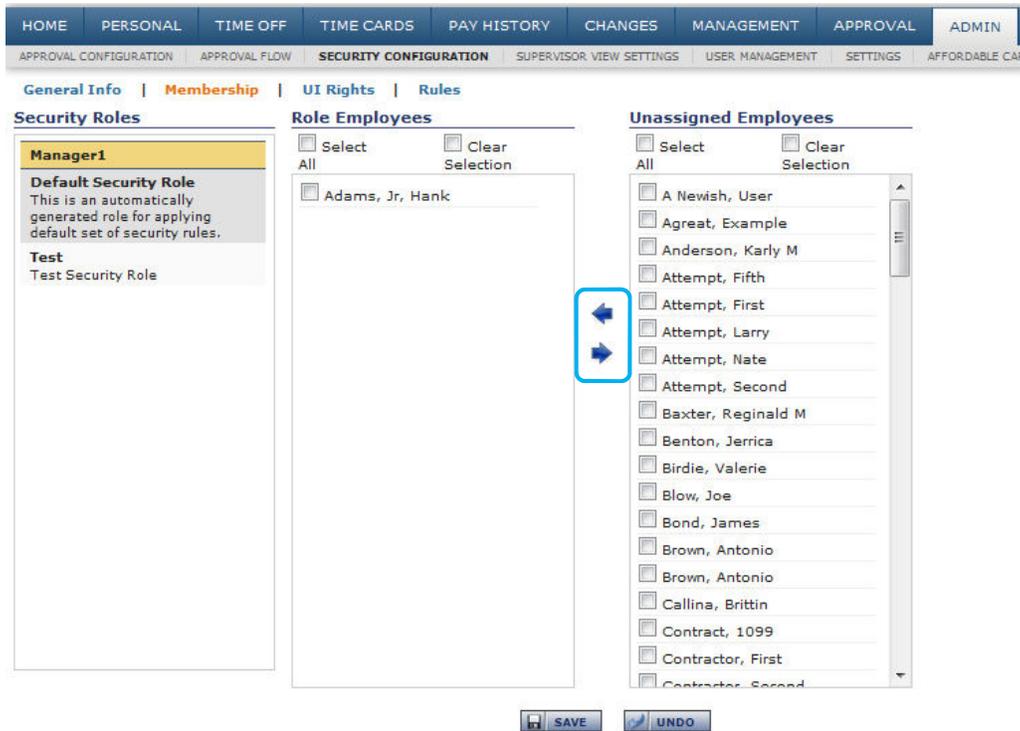
Security Configuration allows an Administrator to create user roles to assign to their users of self service. A security role here would allow you to block certain tabs or information on tabs the employee sees. First, set up the General Info of the role to include the Role Code (role identifier), and a Description. If the role should be used as default for each user, the 'Default Role?' box should be marked. All roles in the system will appear in the Security Roles box on the left-hand side of the screen. Selecting a role will open the details for the role.

The screenshot shows the 'Security Configuration' section of the web application. The top navigation bar includes 'HOME', 'PERSONAL', 'TIME OFF', 'TIME CARDS', 'PAY HISTORY', 'CHANGES', 'MANAGEMENT', 'APPROVAL', 'ADMIN', and 'AFFORDABLE CA'. Below this, a sub-navigation bar shows 'APPROVAL CONFIGURATION', 'APPROVAL FLOW', 'SECURITY CONFIGURATION', 'SUPERVISOR VIEW SETTINGS', 'USER MANAGEMENT', 'SETTINGS', and 'AFFORDABLE CA'. The main content area is titled 'Security Roles' and shows details for a role named 'Manager1'. The 'Role Code' is 'Manager1', and the 'Default Role?' checkbox is checked. The 'Description' field is empty. There are buttons for 'SAVE', 'ADD', 'UNDO', and 'DELETE'.

<Figure 8.3.A>

## Membership

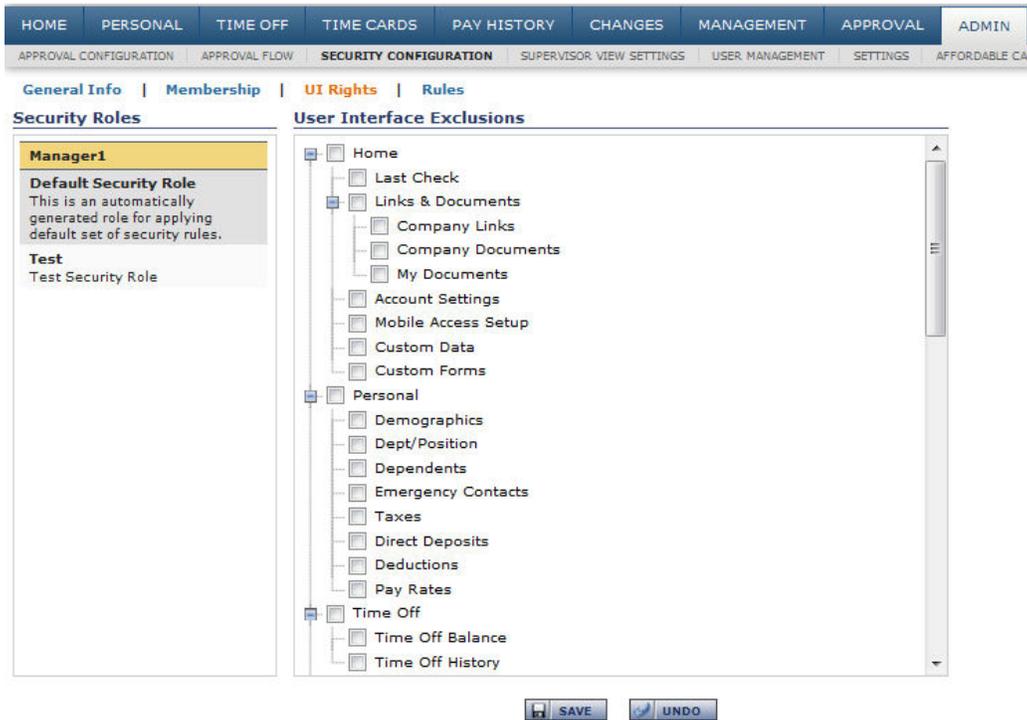
The Membership page of the tab allows the administrator to choose which employees within their company should have the role assigned to them. The option to Select All at the top of the employee listings moves all employees to/from the role. If you marked the 'Default Role?' option on the preceding page, it is unnecessary to select all employees and assign them manually to the role. Once done marking the employees, use the left-facing arrow to move the employees into the Role Employees box, thus assigning them the role. The right-facing arrow moves the employees from the role when selected under Role Employees.



<Figure 8.3.B>

## UI Rights

An administrator can block entire pages of self service from being accessed by the Role Employees. Checkboxes can be marked to block entire modules (Home, Personal, Time Off, Pay History, Changes) or individual screens within the modules. While the employee cannot see certain areas like Management or Approval, it is not necessary to block those pages on the UI Rights because of their role as an Employee on their Self Service account.



<Figure 8.3.C>

## Rules

**General Information** As an administrator, you may configure security down to the individual field-level of each screen. Begin by selecting the screen containing the field to block in Data to Secure and then how the Rule Applies When different user types (manager or employee) access the information. While you may want managers to see data for their employees, you may not want them to change any information. In previous versions of the application, managers had access to change anything an employee could. This curbs that access. Next, choose whether the Role Employees should be denied access for Adding, Editing or Deleting from the selected screen. This option comes into play when you have some employees that you want to follow the normal Configuration (setting tabs and fields for approval) and you have some that shouldn't. The Rule Description automatically populates as the Security Rule is built.

Secured Data	Description
Demographics	When viewing own data

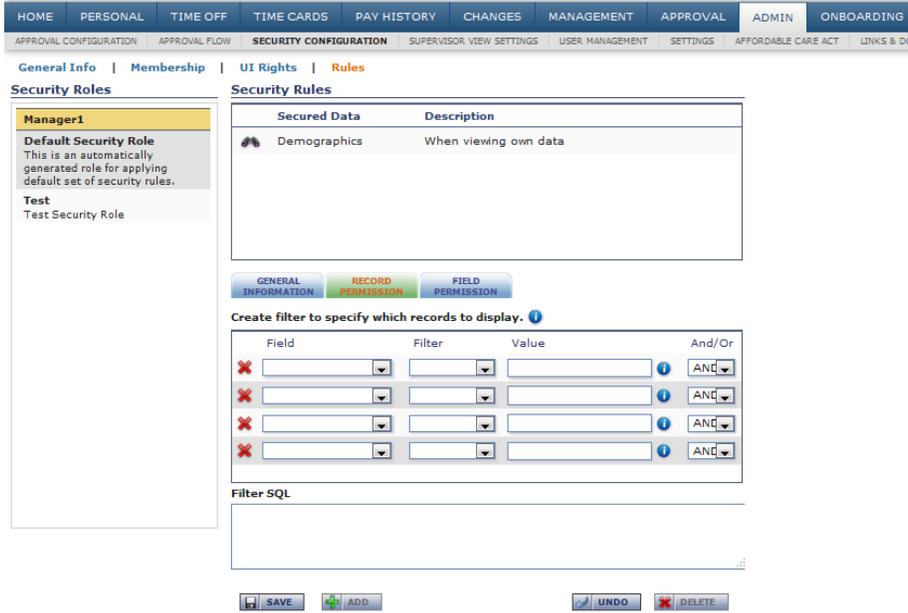
**GENERAL INFORMATION** | RECORD PERMISSION | FIELD PERMISSION

Data to Secure: Demographics  
Rule Applies When: viewing own data  
Deny Adding:   
Deny Editing:   
Deny Deleting:   
Rule Description: When viewing own data

SAVE | ADD | UNDO | DELETE

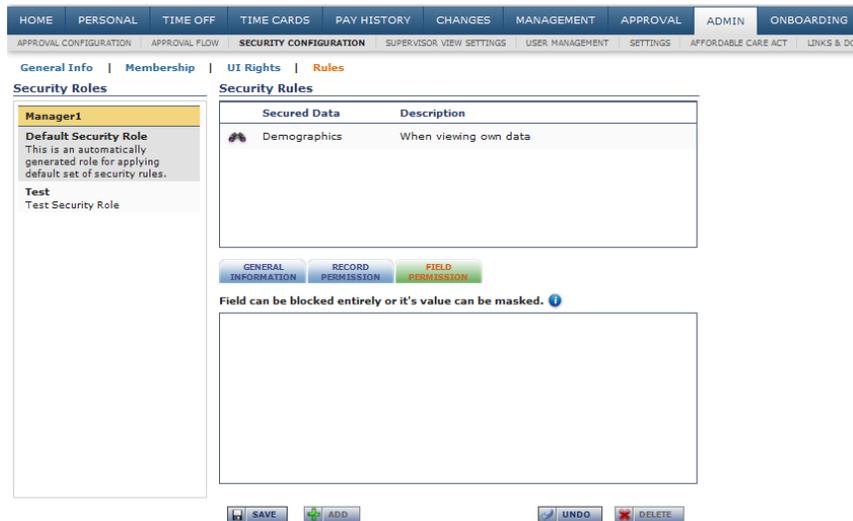
<Figure 8.3.C>

**Record Permission** Next, certain information can be blocked from viewing on a screen by setting Record Permissions. Choose a field on the screen and a Filter option. In the Value field, either type in the value to be secured (with commas in between codes) or click on the information button to see a list of available codes. Click Update Values when done. And/OR may be used to join multiple record permissions together. Keep in mind 'And' statements should come before 'Or' statements. To delete permissions, click the Delete button.



<Figure 8.3.E>

**Field Permission** Fields may be completely blocked (shown with no data to the role user) by clicking the 'Block?' box next to the appropriate Field name. Certain fields can also be masked so not all data shows. Typically this occurs with fields like SSN and direct deposit account. An example of masking is by entering 'XXX-XX-????' to mask SSN 123-45-6789. The result to the role user would be shown as 'XXX'XX'6789'. Any character, other than '?' will replace the character value it is in place of. The '?' uses the character as it is on the employee.



<Figure 8.3.F>

## 8.4 User Management

A listing of all employees in the company and the Self Service accounts that have been set up for each are displayed in User Management. An Administrator has the ability to disable or enable a user's account in the Account Information section, mark the employee's email address as verified in Email Settings (if the employee never received the email; for Full Service Kiosk), change the user account password under Password, and set a user account to Administrator or Employee role in Security.

The screenshot displays the 'USER MANAGEMENT' section of a web application. At the top, there is a navigation menu with tabs for HOME, PERSONAL, TIME OFF, TIME CARDS, PAY HISTORY, CHANGES, MANAGEMENT, APPROVAL, ADMIN, and ONBOARDING. Below this, a sub-menu includes APPROVAL CONFIGURATION, APPROVAL FLOW, SECURITY CONFIGURATION, SUPERVISOR VIEW SETTINGS, **USER MANAGEMENT**, SETTINGS, AFFORDABLE CARE ACT, and LINKS & DOCUMENTS.

On the left side, there are filter options: Sort (dropdown), Filter (All Employees), Name (text input), and Emp ID (text input). On the right side, there are checkboxes for Admin Users, Employee Users, Non Employee Users, and Employees Not Setup, along with SEARCH and CLEAR FILTERS buttons.

The main area contains a table with the following columns: Emp ID, Name, User Name, Role, and (Verified?) Ess Email. The table lists several users, including MR-38 A Newish, User; 19096 Adams, Jr. Hank; 19110 A great, Example; MR-1 Anderson, Karly; 19103 Attempt, Fifth; 19087 Attempt, First; 19106 Attempt, Larry; and MR-20 Attempt, Nate. Each row has a status icon (a person with a red X) and a verified status icon (a checkmark).

Below the table, there are four sections for user details:
 

- Account Information:** User Name (UA Newish9000), Account Description, Created (3/18/2016 9:19:26 AM), Last Login (3/18/2016 9:19:01 AM), Password Changed (3/18/2016 9:19:26 AM), and Account is Enabled (with a DISABLE button).
- Password:** A note stating 'Password must be at least 6 characters long, and contain at least one special character (ex: !@=#%) or one digit (0-9)', followed by New Password and Confirm Password input fields, and a checkbox for 'User must change password at next login?' (checked). A CHANGE PASSWORD button is at the bottom.
- Email Settings:** Email Verified? (checked), Email (hlee@pay-net.net), and a SAVE EMAIL button.
- Security:** Security Role (Employee) and a CHANGE ROLE button.

At the bottom of the table, there is a pagination bar showing 'Page size: 25' and '156 items in 7 pages'.

<Figure 8.4.A>

For an employee without an account, an Administrator can click VIEW to create the user account from the screen.

The screenshot shows the 'USER MANAGEMENT' section of the application. At the top, there are navigation tabs: HOME, PERSONAL, TIME OFF, TIME CARDS, PAY HISTORY, CHANGES, MANAGEMENT, APPROVAL, and ADMIN. Below these are sub-tabs: APPROVAL CONFIGURATION, APPROVAL FLOW, SECURITY CONFIGURATION, SUPERVISOR VIEW SETTINGS, USER MANAGEMENT (selected), SETTINGS, and AFFORDABLE CARE. The main area contains a search and filter section with fields for Name and Emp ID, and checkboxes for Admin Users, Employee Users, Non Employee Users, and Employees Not Setup. A table lists employees with columns for Emp ID, Name, User Name, Role, (Verified?) Ess Email, and a status icon. The employee 'Anderson, Karly' (Emp ID MR-1) is highlighted. Below the table is a 'Create Account' form with fields for Account Type (Employee Account), Employee (Anderson, Karly), User Name, Password, Confirm Password, Security Role (Employee), and Email. There are also checkboxes for 'User must change password?' and 'Email Verified?'. To the right of the form is an 'Invitation to Register' section with a message and a 'Work Email' / 'Personal Email' section.

<Figure 8.4.B>

## 8.5 Settings

The Settings tab allows an Administrator to change the Company Logo that appears at the top of the screen. Logos need to be 200X50 pixels or less and should be of type .bmp, .gif, .jpg, or .png. Choose Browse to select the file and UPLOAD to set it. The logo can be RESET at any time to the service bureau's logo. To set the Landing Page for users so they do not see their Last Check information as the default, simply click on the page to set and confirm. Click the RESET LANDING PAGE button to set to the system default, Last Check.

The screenshot shows the 'SETTINGS' section of the application. At the top, there are navigation tabs: HOME, PERSONAL, TIME OFF, TIME CARDS, PAY HISTORY, CHANGES, MANAGEMENT, APPROVAL, and ADMIN. Below these are sub-tabs: APPROVAL CONFIGURATION, APPROVAL FLOW, SECURITY CONFIGURATION, SUPERVISOR VIEW SETTINGS, USER MANAGEMENT, SETTINGS (selected), and AFFORDABLE CARE. The main area contains a 'Company Logo' section with a message: 'The following file extensions are allowed: .bmp,.gif,.jpg,.png. Image logo file should have the following dimensions: width = 200px; height = 50px'. There is a 'Browse...' button, a text field showing 'No file selected.', an 'UPLOAD' button, and a 'RESET LOGO' button.

<Figure 8.5.A>

# 9: Additional Features

There are several features of the system that are employer-elected and may be set up by you for your use as well as for your employees. The features are described in this section.

## 9.1 Statements & Notifications

One of the key features of the system is your ability to receive your pay stubs in an electronic format. Enrolling in Electronic Direct Deposit Vouchers will stop the printing of paper stubs for you. Simply **CLICK TO ENROLL**. If you used an email address when registering your account on Self Service, you will also be enrolled to receive Email Notifications when your stub is available online on your check date. You can un-enroll/unsubscribe at any time. \*\* It is not necessary to enroll to receive your stub online. This simply turns off paper printing. \*\*

**Online Payroll Statements**

**IMPORTANT DISCLOSURES**

**PLEASE MAKE SURE YOU READ AND UNDERSTAND THESE DISCLOSURES PRIOR TO COMPLETING THE OPT IN PROCESS.**

**What is a Direct Deposit Voucher/Statement?** Each pay period you are paid, you receive a document outlining the wages and benefits paid. This document is either a paycheck or a voucher, if any of your net pay is paid via check, then it is considered a check, otherwise it is a voucher.

**Physical Check** You will always receive a physical check anytime your paycheck is not 100% Direct Deposit.

**Hardware and Software Requirements** In order to access and print your pay stubs you will need a computer with a connected printer and with access to the internet. You will also need the Adobe Acrobat Reader software (v 5.0 or higher).

**Restrictions / Limitations** The only requirement for you to eligible is: 100% of your paycheck must be direct deposited into one or more of your bank accounts. If you do enroll and your paycheck is not allocated 100% to direct deposit, you will continue to receive a physical check.

**Additional Information** If you elect to make any changes to your enrollment status, we will send confirmation via email. If you do not receive the email, you can verify that the box is checked below. Any modifications to your election status will take place on the 4/8/2016 check date.

**Instructions** Use the button below to update your election status for electronic voucher's as well as receiving email notifications when your statement is available.

**Electronic Direct Deposit Vouchers:** use the button below to enroll or withdraw from the program.

Currently Enrolled  [CLICK TO WITHDRAW CONSENT](#)

**Email Notifications:** as an additional option, you can receive an email notification whenever your paycheck is available.

Subscribed  [CLICK TO UNSUBSCRIBE](#) [VIEW MY PAY STUBS](#)

<Figure 9.1.A>

## 9.2 W-2 / 1099

Your W-2/1099 may be issued electronically and made available to you in Self Service. If available, the screen will appear in the Pay History Module and you'll need to read the Disclosure and then CLICK TO ENROLL if you agree. You can un-enroll at any time.

The screenshot shows a web interface with a navigation bar at the top containing: HOME, PERSONAL, TIME OFF, TIME CARDS, PAY HISTORY (selected), CHANGES, MANAGEMENT, and APPROVAL. Below the navigation bar is a sub-menu with: CHECK HISTORY, TAX FORMS (selected), and STATEMENTS / NOTIFICATIONS.

The main content area is titled "Online Tax Form Enrollment" with a green exclamation mark icon. Below the title is the heading "IMPORTANT DISCLOSURES".

**PLEASE MAKE SURE YOU READ AND UNDERSTAND THESE DISCLOSURES PRIOR TO COMPLETING THE OPT IN PROCESS.**

**Paper Statement** You are under no obligation to receive your tax form electronically. If you decide not to opt in to this program you will still receive your paper copies. Participation in electronic delivery is not mandatory.

**Requesting a Paper Copy** Once you opt into receiving your tax forms electronically, you will need to do the following if you need to obtain a paper copy. Email HankTestGuy Adams at hollis@staticircus.com. Requesting a paper copy in the manner described above will not be treated as a withdrawal of consent, you will continue to receive your forms electronically until you withdraw from the program or a termination event occurs.

**Scope and Duration of Consent** By opting in, you will receive your tax forms electronically for any year(s) that have been published online for your company. You will continue to receive your tax forms electronically until you withdraw from the program or an event outlined in the notice of termination. Your withdrawal of consent will be effective immediately following your clicking the 'Click To Withdraw Consent' button on this enrollment screen. Withdrawal of consent affects only future documents and does not apply to previously issued forms.

**Notice of Termination** You will no longer receive your tax forms electronically if your employment with Pay-Net Solutions Inc is terminated, or if Pay-Net Solutions Inc terminates its relationship with myReadyPay Kiosk or cancels subscription to myReadyPay Kiosk.

**Updating Information** You are responsible for keeping your employer informed of any changes in your contact information. You can update your employer using the procedures outlined below. If your company allows you to request changes to your profile via myReadyPay Kiosk then you will need to request updates via the website, otherwise we recommend following your outlined company policies to update your employee demographic data.

**Hardware and Software Requirements** In order to access and print your tax forms you will need access to the internet and ability to view PDF files. We recommend using Adobe Acrobat Reader (version 5.0 or higher). You can download the software for free by going to [www.adobe.com/products/acrobat/readstep.html](http://www.adobe.com/products/acrobat/readstep.html).

**Note** If you are not enrolled in this program you will continue to receive a paper copy of your tax form.

If you elect to make any changes to your enrollment status, we will send confirmation via email. If you do not receive the email, you can verify that the box is checked above.

**Instructions** If you wish to stop receiving your tax forms online, click the button below.

Currently Enrolled   [CLICK TO WITHDRAW CONSENT](#) [VIEW TAX FORMS](#)

<Figure 9.2.A>