

Employee Online

User Manual

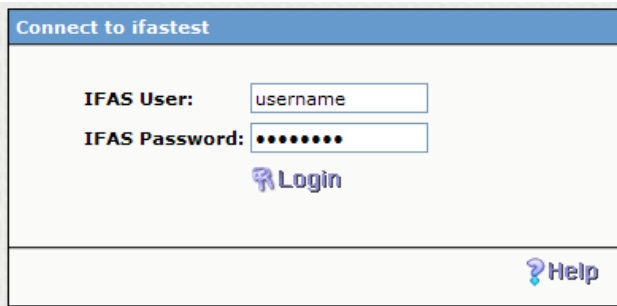
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1. ACCESSING THE SYSTEM

1.1. Logging In

1. Access <http://www.union.edu/employee> using an internet browser such as Internet Explorer or Firefox.
2. Enter your username and password in the appropriate fields. Your password is the same password you use to log into your office computer. If you do not have a Union login, contact Heather Quaintance by sending an email message to quaintah@union.edu for more information.

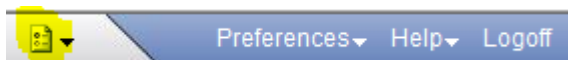


3. Click on Login

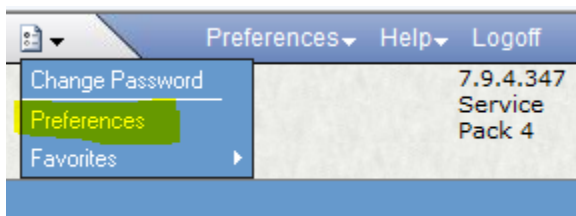
1.2. Adding the Employee Online Tab to your IFAS Dashboard

If you are an IFAS User, you can also do the following to create a separate tab to access Employee Online from the IFAS Dashboard:

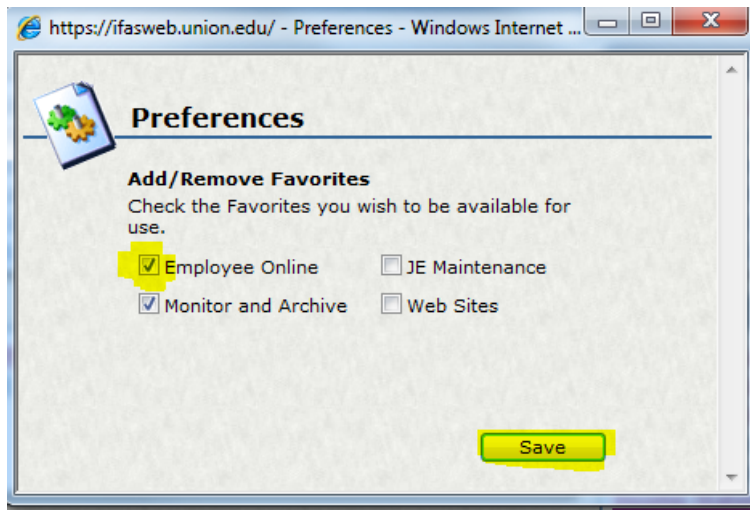
1. Login to IFAS and click on the icon highlighted below. It is in the upper right-hand corner of your IFAS Dashboard.



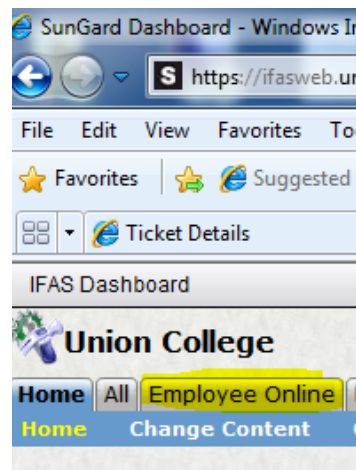
2. Select "Preferences" from the dropdown menu.



3. Check the box next to "Employee Online" and click on Save to add the Employee Online tab as a favorite.



4. Upon saving this preference, you will be returned to the IFAS Dashboard with an additional Tab for Employee Online as shown below:

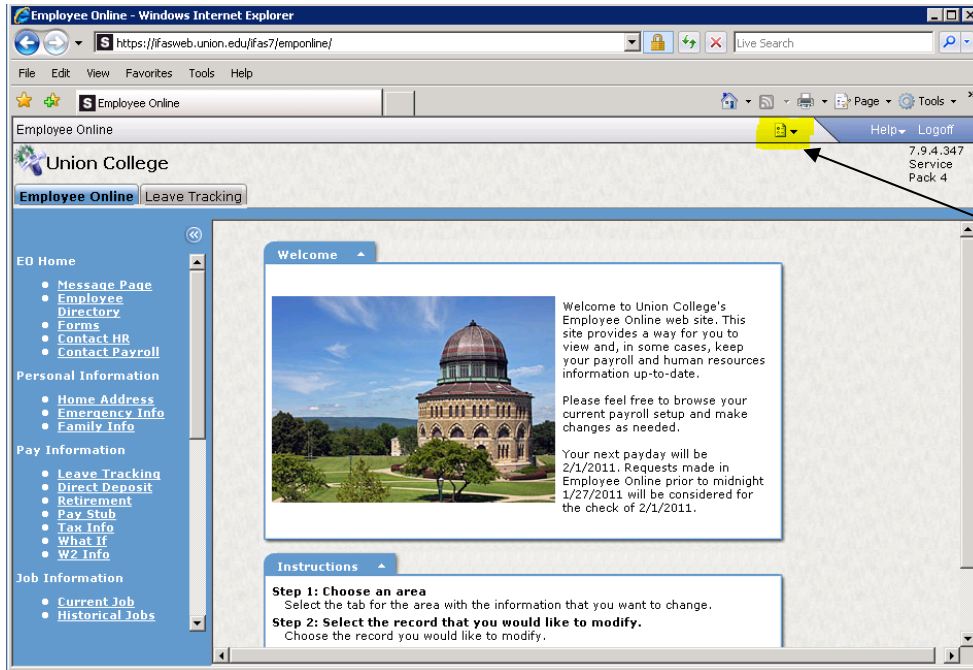


5. Click on the Employee Online tab to view the Employee Online menu.

1.3. Changing Your Password

If you have a Windows domain/Union username and password, there is **no need** to change your Employee Online password. When you change your Union password, your Employee Online password will be updated as well.

If you do not have a standard Union username and password, you can change your password by logging into Employee Online and clicking on the Options button displayed below and selecting Change Password. You will then be presented with the Change Password window which will allow you to change your password.



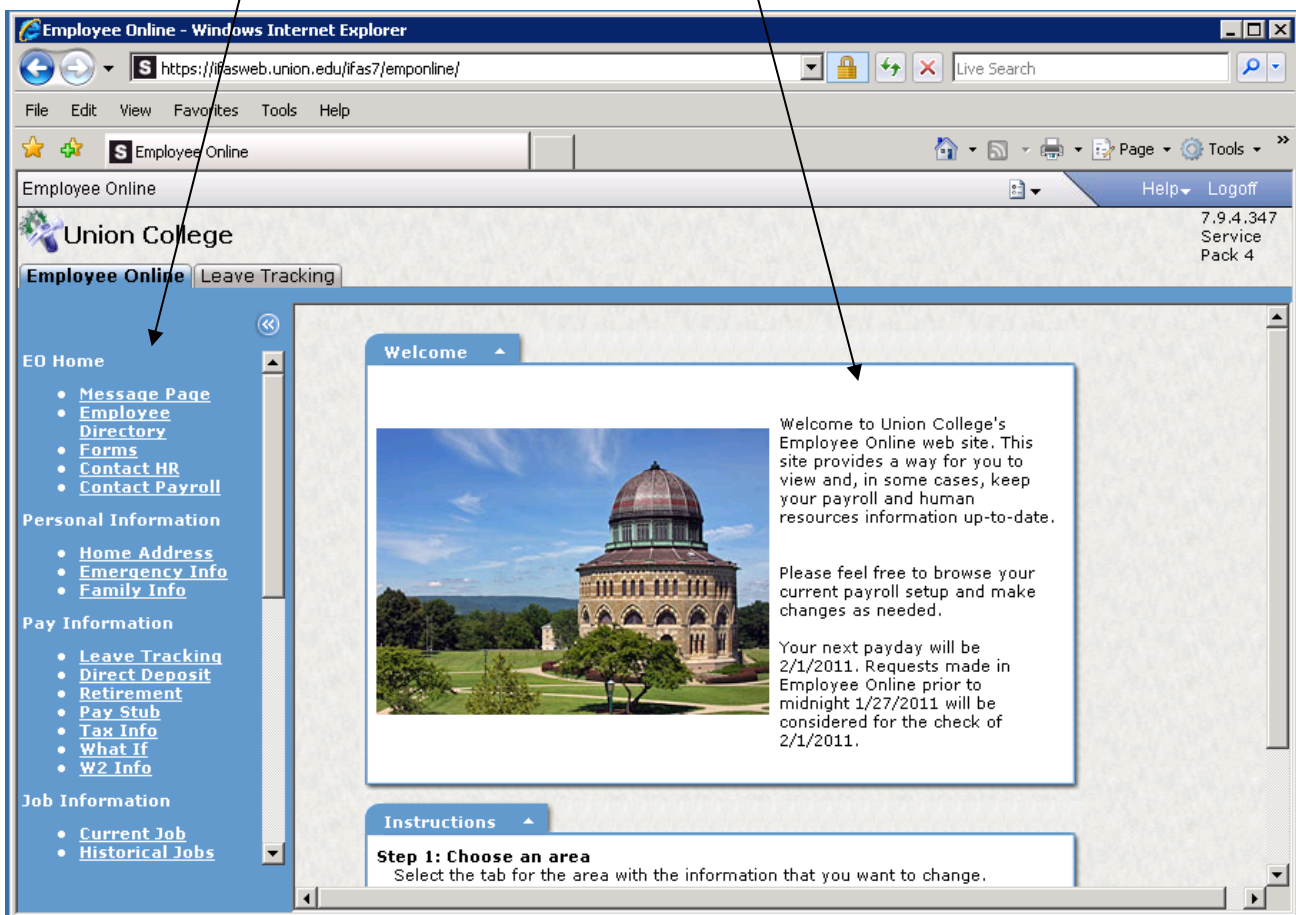
2. DASHBOARD & HOME PAGE

2.1. Home Page

The Home Page is the main page when you log in and contains many of the Employee Online activities that are common to employees across the entire College.

Menu Bar:
Provides a listing of all the Employee Online options

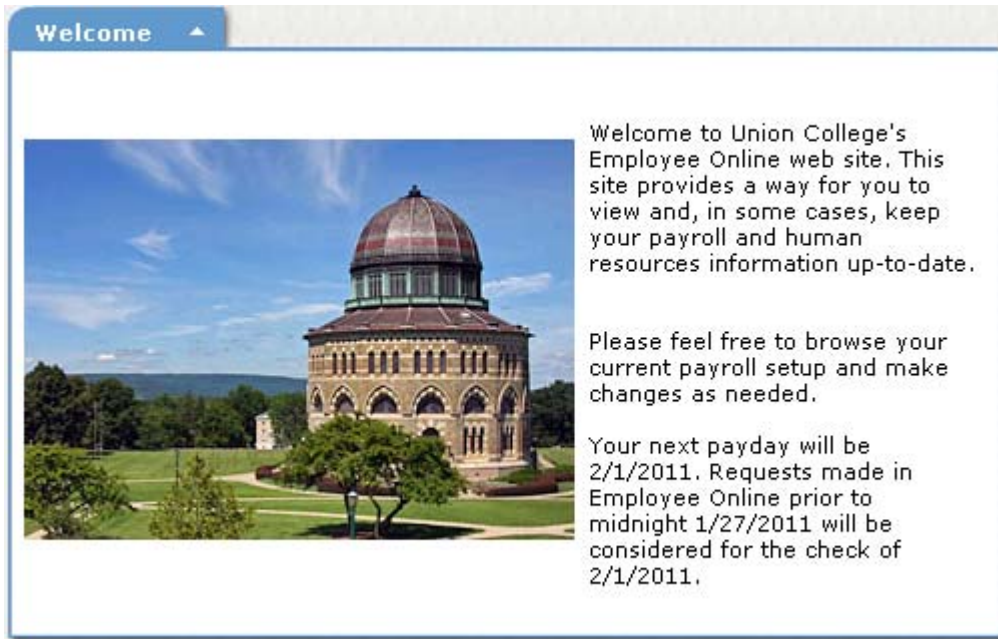
General information is provided in the Welcome section. Your next pay date and deadlines for submitting changes to items such as your direct deposit, tax withholdings, and additional retirement contributions will be available here.



3. AVAILABLE OPTIONS

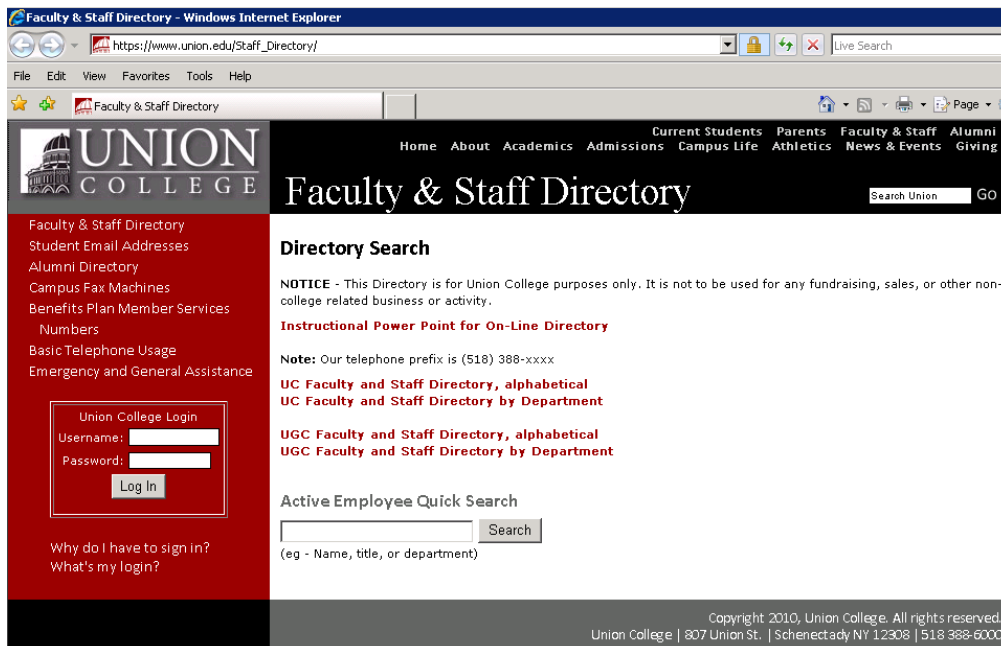
3.1. Message Page

The Message Page provides information about pay dates and deadlines for submitting any changes.



3.2. Employee Directory

The Employee Directory option will take you directly to the directory available on Union College's website.



3.3. Forms

The following forms are available from the Forms option on the EO Menu Bar.

Forms to Download		HEATHER C. QUAINANCE	 Help
Form Name	Description		
CDPHP-HMO & UCPOS Claim Form	Used to...		
CVS Caremark Order Form	Used to order prescriptions.		
Delta Dental Form	Used for submitting claims to Delta Dental.		
Direct Deposit	Used to change or add direct deposit.		
Employee Scholarship Policy and Request/Approval Form	Used to request funding for professional development.		
Employee Information Sheet	Used to collect employee information.		
Exit Interview Questions	Used to collect information when an employee is leaving the college.		
EYEMED Out of Network Claim Form	Used to submit a claim form to EYEMED.		
Flexible Spending Account Enrollment Form	Used to set up flexible spending account.		
Flexible Spending Reimbursement Claim Form	Used to submit flex spending receipts for reimbursement.		
I-9 Employment Eligibility Verification Form	Used to document that employee is authorized to work in the United States.		
IT2104 - NYS Withholding Allowances	Used to specify state income tax withholdings.		
Retirement - Investment Election Form	Used to specify an employee's retirement contributions.		
Retirement - Roth IRA Form	Used to set up a Roth IRA.		
Student Payroll Form	Required for hiring student employees.		
Time and Effort Report	Used for grant-funded work completed.		
Timesheet - Bi-Weekly Staff			
Timesheet - Student			
Vacation Request Form	Used by administrators and librarians to request vacation time.		
W-4 Form - Withholding Allowances	Used to specify federal income tax withholdings.		

3.4. Contact HR

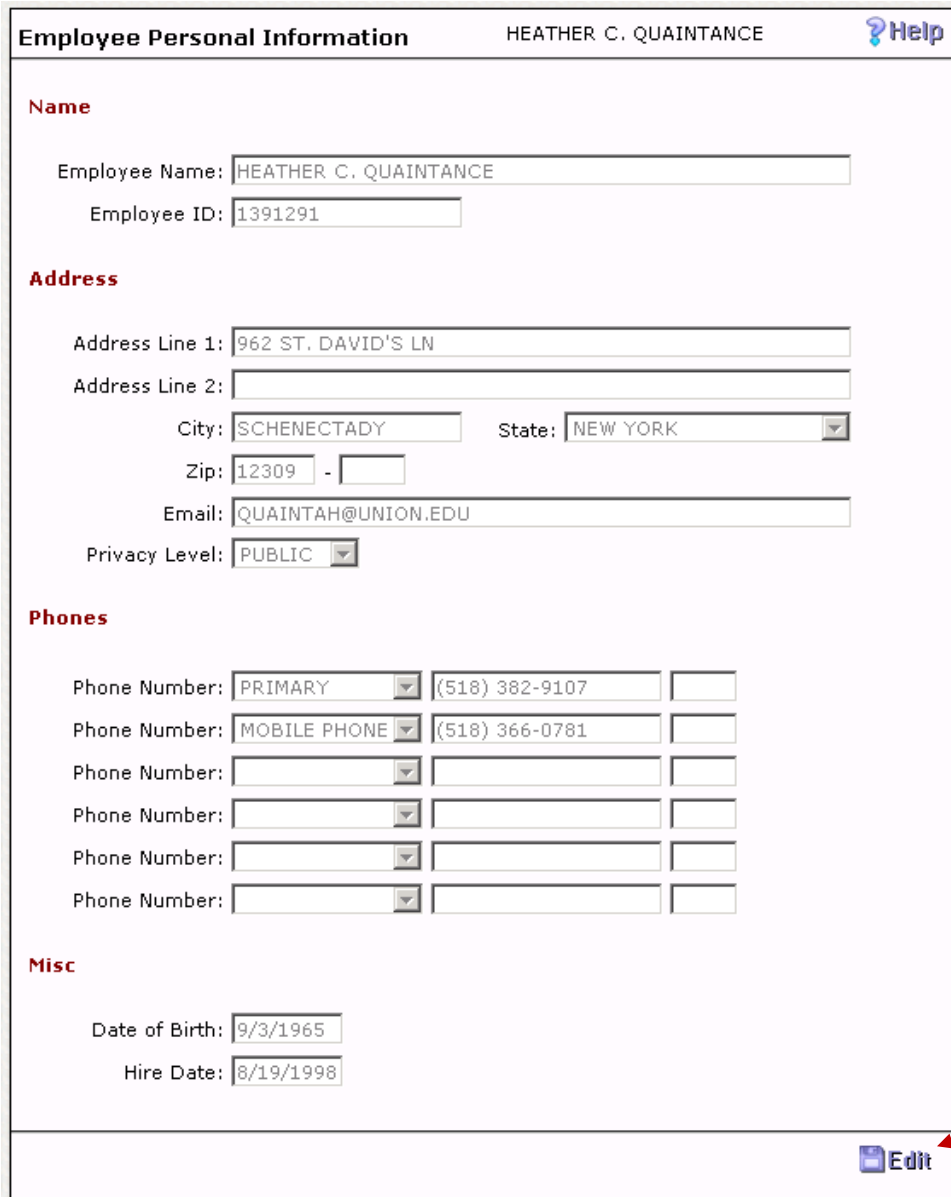
To contact the Human Resources department, click on Contact HR from the EO Menu Bar.

3.5. Contact Payroll

To contact the Human Resources department, click on Contact HR from the EO Menu Bar.

3.6. Home Address

Your home address, email address, and phone data will be displayed as follows. To make a change, click on "Edit" in the lower right-hand corner.



Employee Personal Information HEATHER C. QUAINANCE [Help](#)

Name

Employee Name:

Employee ID:

Address

Address Line 1:

Address Line 2:

City: State:

Zip: -

Email:

Privacy Level:

Phones

Phone Number: (518) 382-9107

Phone Number: (518) 366-0781

Phone Number:

Phone Number:

Phone Number:

Phone Number:

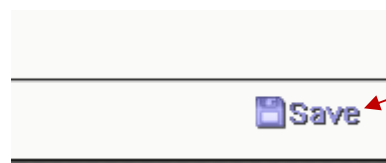
Misc

Date of Birth:

Hire Date:

[Edit](#)

After you have made your updates, an option to save the changes is available in the lower right-hand corner.



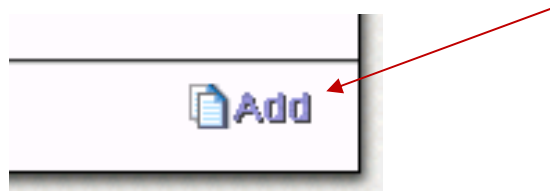
[Save](#)

3.7. Emergency Info

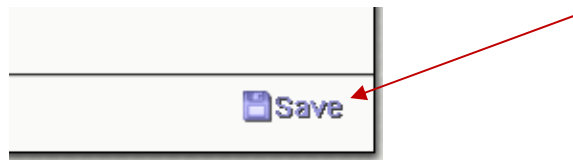
Click on “Emergency Info” on the EO Menu Bar and your emergency information will be displayed as follows.

Emergency Contacts		HEATHER C. QUAINANCE		? Help
Name	Relationship	Phone 1	Phone 2	
JOHN HOWARD QUAINANCE	SPOUSE	(518) 878-3031		Delete
				Add

To add an Emergency Contact, click on Add in the lower right-hand corner.



To make a change, click on the contact’s name and click on “Edit” in the lower right-hand corner. After you have made your updates, an option to the save the changes is available in the lower right-hand corner.

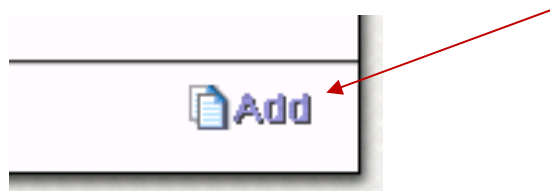


3.8. Family Info

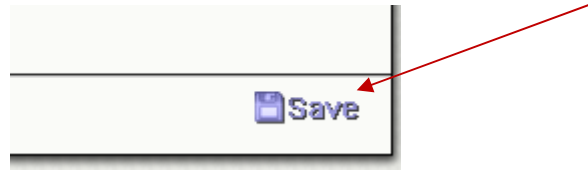
Click on “Family Info” on the EO Menu Bar and your family member information will be displayed as follows. To make a change, click on the family member’s name and click on “Edit” in the lower right-hand corner.

Emergency Contacts		HEATHER C. QUAINANCE		? Help
Name	Relationship	Phone 1	Phone 2	
JOHN HOWARD QUAINANCE	SPOUSE	(518) 878-3031		Delete
				Add

To add an Emergency Contact, click on Add in the lower right-hand corner.



To make a change, click on the contact’s name and click on “Edit” in the lower right-hand corner. After you have made your updates, an option to the save the changes is available in the lower right-hand corner.



3.9. Vacation Leave Tracking

To view your vacation leave, click on Leave Tracking on the EO Menu Bar. Using the dropdown arrow, change the Leave Type field shown below to "Vacation Balance" and click on Submit.

ID: [Redacted] Leave Type: **Vacation Balance** ▼
 Name: [Redacted] Years of Detail: 1 ▼
 Submit

Clicking on Submit will display the following information. Vacation earned will be displayed for every pay period and vacation used will be displayed as processed by the Payroll department.

ID: [Redacted] Leave Type: **Vacation Balance** ▼
 Name: [Redacted] Years of Detail: 1 ▼
 Submit

Current Balance: -83.33398

Date	Period	Trans Amt	Hour	Code	End Balance
01/31/2011	1102002	-120.00000	3070	VAC USE	-83.33398
01/31/2011	1102002	7.33333	3071	VAC EAR	36.66602
01/13/2011	1102001	7.33333	3071	VAC EAR	29.33269
12/31/2010	1002024	-8.00000	3070	VAC USE	21.99936
12/31/2010	1002024	7.33333	3071	VAC EAR	29.99936
12/14/2010	1002023	7.33333	3071	VAC EAR	22.66603
11/30/2010	1002022	7.33333	3071	VAC EAR	15.33270
11/14/2010	1002021	7.33333	3071	VAC EAR	7.99937
10/31/2010	1002020	7.33333	3071	VAC EAR	.66604
10/14/2010	1002019	-48.00000	3070	VAC USE	-6.66729
10/14/2010	1002019	7.33333	3071	VAC EAR	41.33271
09/30/2010	1002018	7.33333	3071	VAC EAR	33.99938
09/14/2010	1002017	-8.00000	3070	VAC USE	26.66605
09/14/2010	1002017	7.33333	3071	VAC EAR	34.66605
08/31/2010	1002016	7.33333	3071	VAC EAR	27.33272
08/15/2010	1002015	7.33333	3071	VAC EAR	19.99939
07/31/2010	1002014	-16.00000	3070	VAC USE	12.66606
07/31/2010	1002014	7.33333	3071	VAC EAR	28.66606
07/14/2010	1002013	-8.00000	3070	VAC USE	21.33273
07/14/2010	1002013	7.33333	3071	VAC EAR	29.33273
06/30/2010	1002012	7.33333	3071	VAC EAR	21.99940
06/14/2010	1002011	-4.00000	3070	VAC USE	14.66607

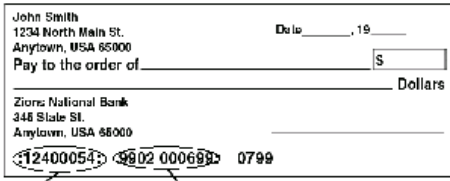
3.10. Direct Deposit

Click on Direct Deposit on the EO Menu Bar to view or modify your direct deposit information. On this screen you can add or change the bank accounts into which your pay is being deposited.

Direct Deposit				Help	
Bank Name KEY BANK KEY BANK	Account *****7633 (Checking) *****0625 (Savings)	One account must be configured with Net indicating that any remaining dollars should be deposited in a specific account	Amt Net \$300	Status Active Pending	close
Click on the Bank Name to modify a deposit amount					Add

Statuses for bank accounts can be **Active** (indicating the deposit will be made on upcoming paydays), **Pending** (indicating that Payroll must process your change request before affecting your pay), and **Locked, Inactive** (indicating that the bank account is no longer being used)

Click on Add to add a new bank account for direct deposit. You will need to know your bank number, account number and the amount you would like to deposit into the bank account. When you have entered all required information highlighted below, click on Save in the lower right-hand corner to submit your direct deposit request.

Direct Deposit New				Help	
Bank Info					
Enter the Bank Number in the first box. See sample check below. The Bank Name will automatically appear.					
Bank Number:	<input type="text"/>	Bank Name:			
Account Info					
Savings Account - Enter account number from bank statement. Checking Account - See sample check below.					
Account Number:	<input type="text"/>	<input type="radio"/> Checking	<input type="radio"/> Savings		
					
BANK NUMBER		ACCOUNT NUMBER			
Deduction Type					
Choose Net if you would like the balance of your check to be deposited. Please remember, if you have more than one direct deposit, you can only have one Net.					
<input type="radio"/> Net <input type="radio"/> Flat Amount Value: <input type="text"/>					
You may only select Net for one account.					
Back				Save	

If you no longer wish to deposit your pay into a particular account, you may click on **close** to discontinue the direct deposit.

To make a change to a dollar amount currently being deposited, click on the Bank Name associated with the account and change the dollar amount in the highlighted field shown below:

Direct Deposit Update ? Help

Bank Info
 Bank Name: KEY BANK
 Bank Number: 021300077

Account Info
 Account Type: Savings
 Account Number: *****0625

Deduction Type
 Choose Net if you would like the balance of your check to be deposited.
 Please remember, if you have more then one direct deposit, you can only have one Net.

Net
 Flat Amount

Value:

You may only select Net for one account.

[Back](#) [Save](#)

3.11. Retirement

Click on Retirement on the EO Menu Bar to access your current retirement information. On this screen, you will see a listing of retirement plans including the 11% that Union College contributes to your retirement and, if you are contributing additional funds to your retirement, this will be displayed as well. Select your Employee Contribution Plan and submit a request to change the dollar amount or percent. If you are not contributing any additional funds at this time, you must contact Human Resources to set it up.

Plan	Amt	Status
FIDELITY RETIREMENT	11 %	Active
FIDELITY-TAX DEFER'D	7 %	Active

3.12. Pay Stub


Click on Pay Stub on the EO Menu Bar and you will be presented with an option to view and print up to 2 years of your pay stubs.

Check Stub		? Help
Check Date	Check Number	
01/14/2011	899458	
01/03/2011	898689	
12/15/2010	897621	
12/01/2010	896659	
11/15/2010	895655	
11/01/2010	894663	
10/15/2010	893685	
10/01/2010	892732	
09/15/2010	891850	
09/01/2010	891113	
08/16/2010	890396	
08/02/2010	889657	
07/15/2010	888599	
07/01/2010	887770	
06/15/2010	886821	
06/01/2010	885848	
05/14/2010	884866	
04/30/2010	883885	

Click on a Check Date
to view a Pay Stub

3.13. Tax Info

The "Tax Info" page allow to view State and Federal Tax related information. Click on the Edit button in the lower right corner to modify this information and submit your request via the system. If you would prefer to fill out the W4, click on the "CLICK HERE TO DOWNLOAD W-4 FORM" link and submit the form to the Payroll department.

Tax Information		? Help
Federal Tax	Record Status: Active	
Filing Status: <input type="text" value="MARRIED"/>	Exemptions: <input type="text" value="2"/>	
Additional Withholding: <input type="text" value="\$40"/>	IRS Flag:	
State Tax	Record Status: Active	
Filing Status: <input type="text" value="MARRIED"/>	Exemptions: <input type="text" value="2"/>	
Additional Withholding: <input type="text" value="\$"/>		
CLICK HERE TO DOWNLOAD W-4 FORM		
		

3.14. What If

The "What If" page allows you to try out different payroll scenarios. It cannot provide you with an exact replica of what your check will be. It can however, give you an idea of how a change might affect your taxes and take home pay. Click on the Create Baseline button to create a gross baseline dollar amount.

What If
? Help

WHAT IF CALCULATOR				RESULTS		
	Description	Baseline	What If	Description	Baseline	What If
GROSS	DOLLARS	<input type="text"/>		EARNINGS	_____	
PRETAX	PRETAX1	_____		PRETAX DEDS	_____	
	PRETAX2	_____		TAXABLE EARNINGS	_____	
	NEW PRETAX	_____		FICA EARNINGS	_____	
TAXES	FIT STATUS	_____		FED WITHHOLDING	_____	
	FIT EXEMPTIONS	_____		FICA WITHHOLDING	_____	
	FIT ADDITIONAL	_____		MEDI WITHHOLDING	_____	
	SIT STATUS	_____		SIT WITHHOLDING	_____	
	SIT EXEMPTIONS	_____		ESTIMATED NET	_____	
POSTTAX	DEDUCTION 1	_____		<i>Estimates will be based on checks in month.</i>		
	DEDUCTION 2	_____				
	DEDUCTION 3	_____				
	DEDUCTION 4	_____				

This screen is an estimation tool only. It cannot calculate exactly what will appear on your next check.

If you leave the Baseline dollars field blank the system will provide a default dollar amount. Please view the Help file for further information about how this screen works.

? Back

After creating a baseline, your current pay with contributions, deductions, and tax information will be displayed

What If
? Help

WHAT IF CALCULATOR				RESULTS		
	Description	Baseline	What If	Description	Baseline	What If
<u>GROSS</u>	DOLLARS	2,291.67	<input type="text"/>	EARNINGS	2,291.67	
<u>PRETAX</u>	EOAFTERTAX DEDUCTION	_____	<input type="text"/>	PRETAX DEDS	31.50	
	MEDICAL EMPLOYEE \$	29.18	<input type="text"/>	TAXABLE EARNINGS	2,260.32	
	DENTAL EMPLOYEE \$	2.32	<input type="text"/>	FICA EARNINGS	2,260.32	
<u>TAXES</u>	EO PRETAX DEDUCTION	_____	50	FED WITHHOLDING	254.26	
	STATE INCOME TAX Status	M	<input type="text"/>	FICA WITHHOLDING	94.93	
	STATE INCOME TAX Exemptions	0	<input type="text"/>	MEDI WITHHOLDING	32.77	
	STATE INCOME TAX Additional	_____	<input type="text"/>	STATE INCOME TAXWITHOLDING	116.95	
	FEDERAL TAX Status	M	EXEMPT	ESTIMATED NET	1,532.10	
<u>POSTTAX</u>	FEDERAL TAX Exemptions	0	<input type="text"/>	<i>Estimates will be based on 1st check in month.</i>		
	FEDERAL TAX Additional	_____	<input type="text"/>			
	ROTH-FIDELITY	229.16	<input type="text"/>			

Please note that your FEDERAL TAX Status defaults to EXEMPT and you will need to change this to the value displayed in the Baseline column.

Enter the What If values you would like to change and press the Submit button.

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In the example below, adding a pre-tax deduction of \$50 and clicking on Submit will display the difference in your net pay as shown below:

WHAT IF CALCULATOR				RESULTS		
	Description	Baseline	What If	Description	Baseline	What If
GROSS	DOLLARS	2,291.67	<input type="text"/>	EARNINGS	2,291.67	2,291.67
PRETAX	EOAFTERTAX DEDUCTION	<input type="text"/>	<input type="text"/>	PRETAX DEDS	31.50	81.50
	MEDICAL EMPLOYEE \$	29.18	<input type="text"/>	TAXABLE EARNINGS	2,260.32	2,210.32
	DENTAL EMPLOYEE \$	2.32	<input type="text"/>	FICA EARNINGS	2,260.32	2,260.32
	EO PRETAX DEDUCTION	<input type="text"/>	50.00	FED WITHHOLDING	254.26	246.76
TAXES	STATE INCOME TAX Status	M	<input type="text"/>	FICA WITHHOLDING	94.93	94.93
	STATE INCOME TAX Exemptions	0	<input type="text"/>	MEDI WITHHOLDING	32.77	32.77
	STATE INCOME TAX Additional	<input type="text"/>	<input type="text"/>	STATE INCOME TAX WITHHOLDING	116.95	113.52
	FEDERAL TAX Status	M	MARRIEC	ESTIMATED NET	1,532.10	1,493.03
	FEDERAL TAX Exemptions	0	<input type="text"/>	CHANGE IN NET	-39.07	
	FEDERAL TAX Additional	<input type="text"/>	<input type="text"/>	<i>Estimates will be based on 1st check in month.</i>		
POSTTAX	ROTH-FIDELITY	229.16	<input type="text"/>			

Enter the What If values you would like to change and press the Submit button.

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3.15. W2 Info

The "W2 Info" page displays your W2 documents. W2s from 2009 and forward will be available for viewing and printing.

3.16. Current Job

The "Current Job" page displays information related to your current and active job positions.

3.17. Historical Jobs

The "Historical Jobs" page lists past job history. This information may or may not be available depending on how your previous

3.18. Benefits

In the Benefits section of Employee Online, you can review your currently selected Insurance, Reimbursement and Additional Retirement benefits. At this time, changes can only be made on an annual basis in the November/December timeframe.