Employee Online

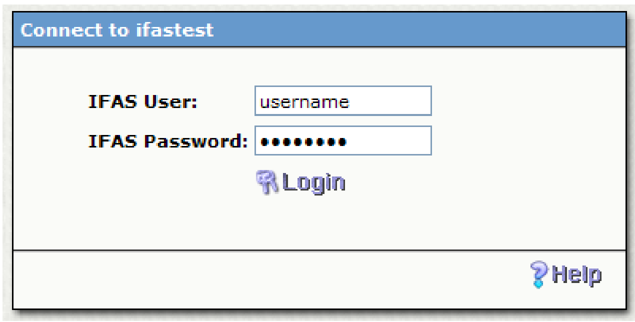
User Manual

Table of Contents

1. Accessing The System

1.1. Logging In

1. Access eo.union.edu using an internet browser such as Google Chrome, 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 the ITS helpdesk.

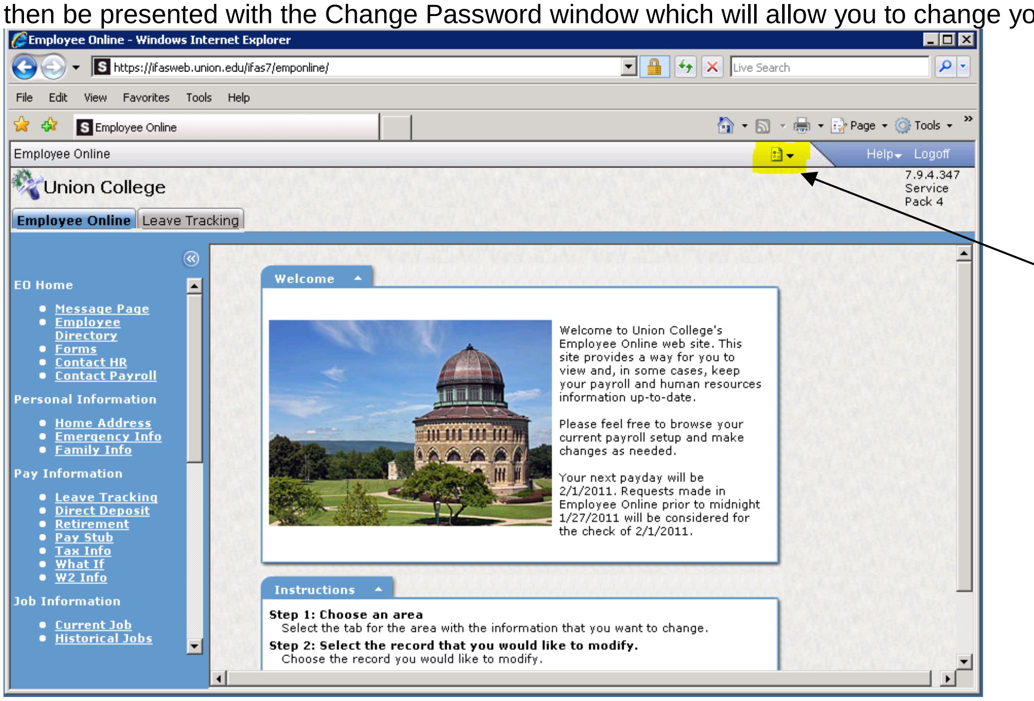


3. Click on Login

1.2. 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.



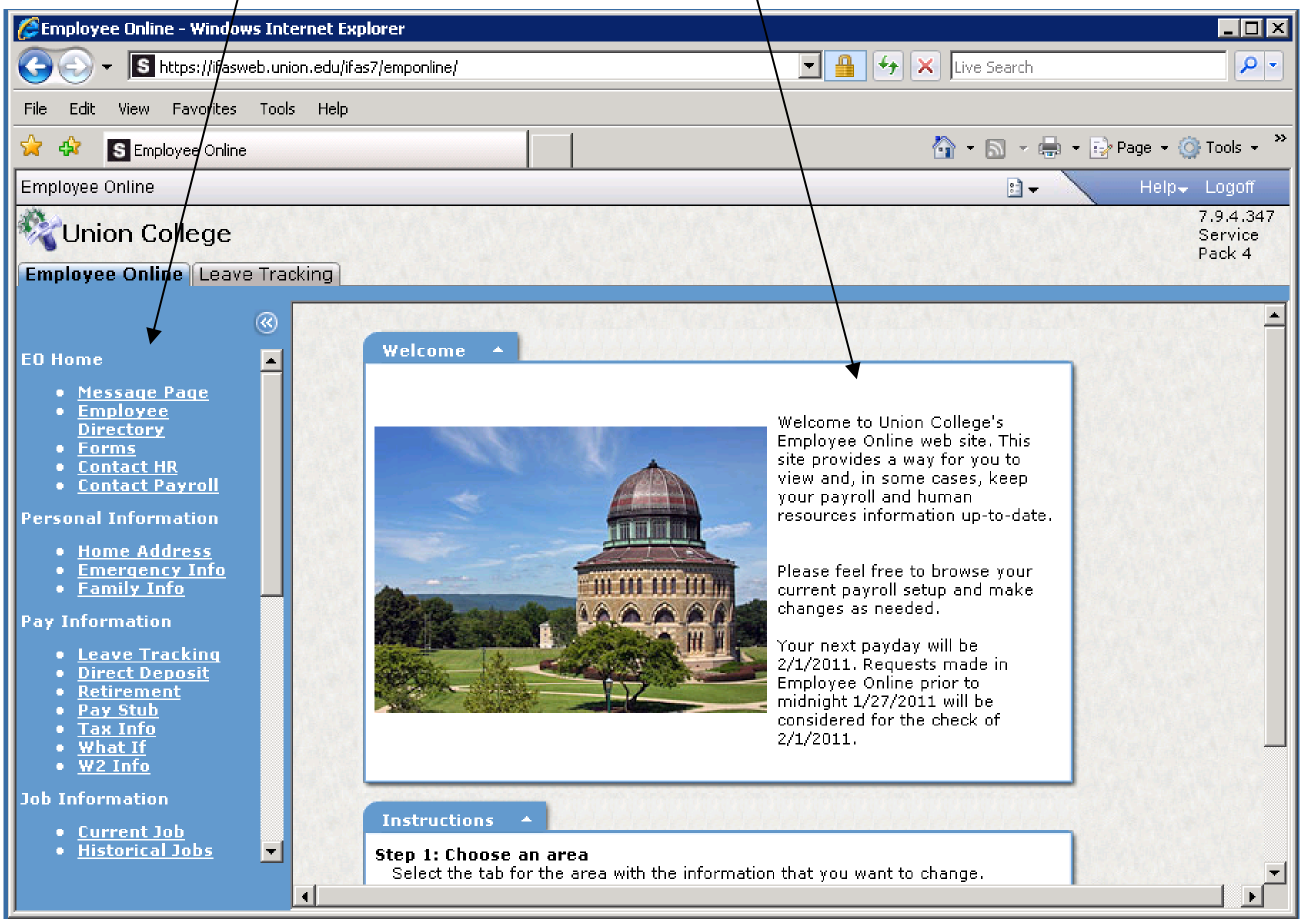
2. Dashboard & Home Page

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

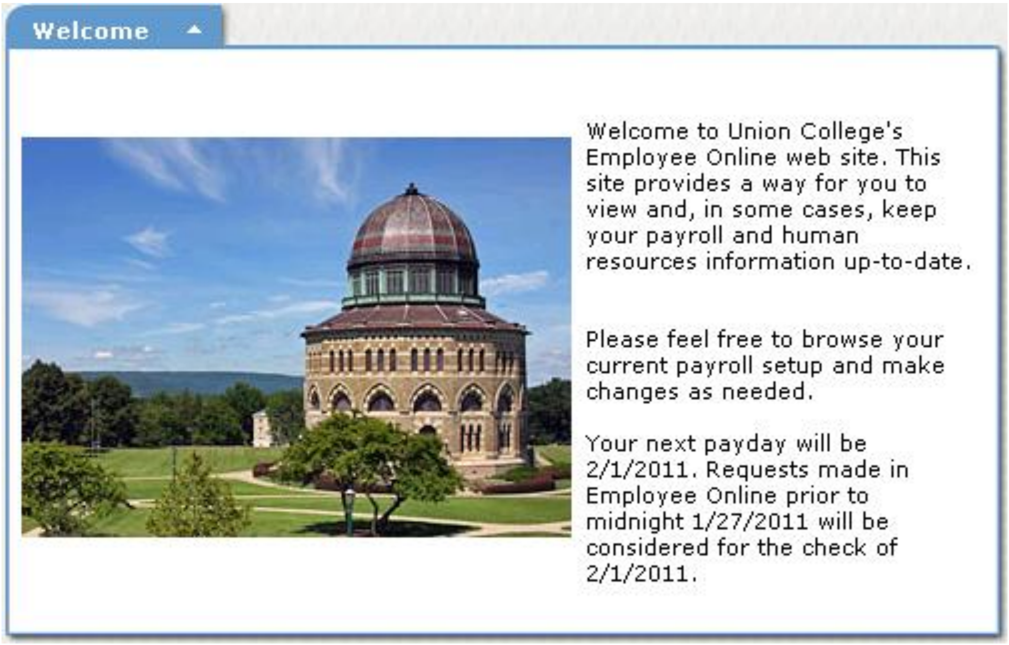
General information is provided in the Welcome section. Your next pay date and deadlines for submitting changes to items such as your direct deposit, tax withholdings, and additional retirement contributions will be available here.



3. Available Options

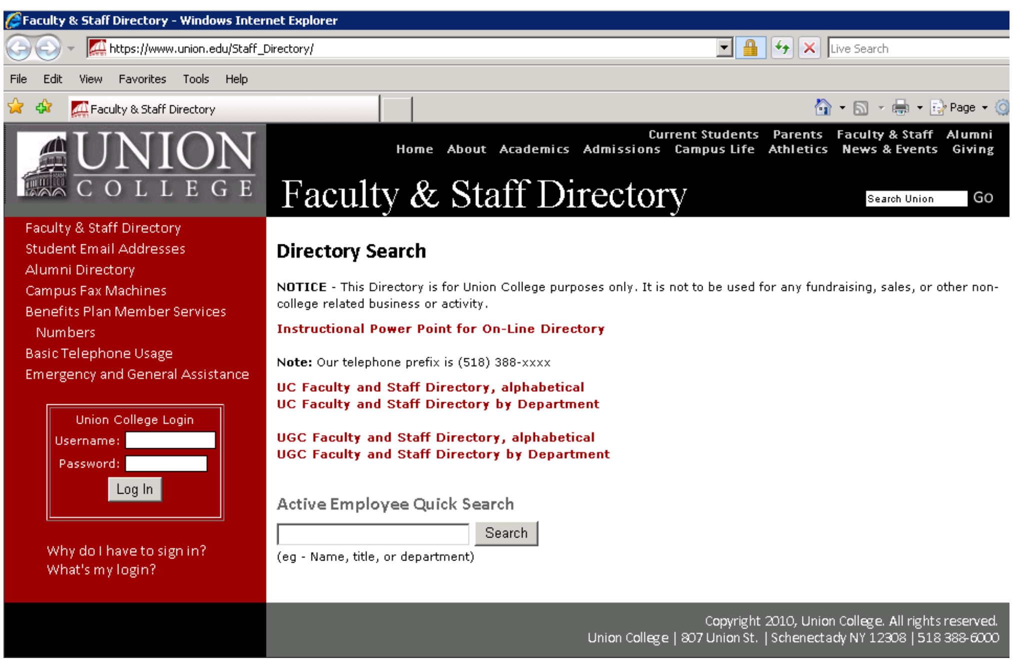
3.1. Message Page

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. QUAINTANCE 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

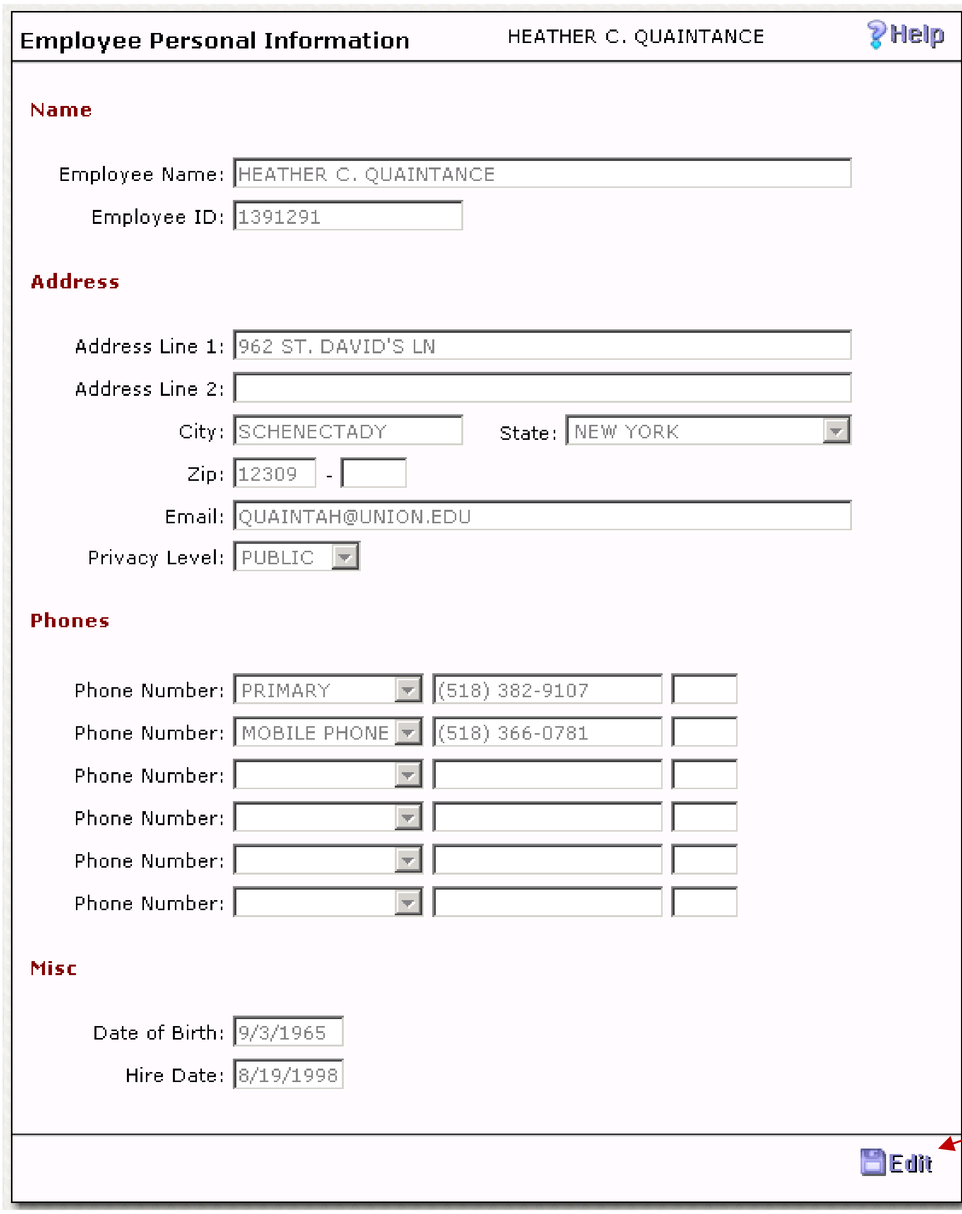
To contact the Human Resources department, click on Contact HR from the EO Menu Bar.

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. QUAINTANCE Help

Name

Employee Name: HEATHER C. QUAINTANCE
Employee ID: 1391291

Address

Address Line 1: 962 ST. DAVID'S LN
Address Line 2:
City: SCHENECTADY State: NEW YORK
Zip: 12309 -
Email: QUAINTAH@UNION.EDU
Privacy Level: PUBLIC

Phones

Phone Number: PRIMARY (518) 382-9107
Phone Number: MOBILE PHONE (518) 366-0781
Phone Number:
Phone Number:
Phone Number:
Phone Number:

Misc

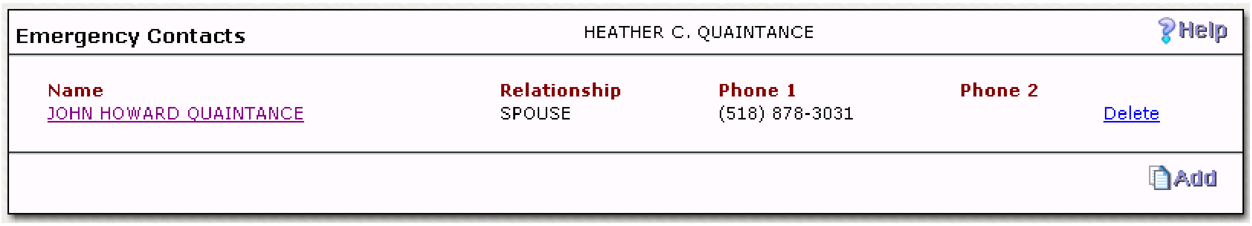
Date of Birth: 9/3/1965
Hire Date: 8/19/1998

Edit

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

3.7. Emergency Info

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

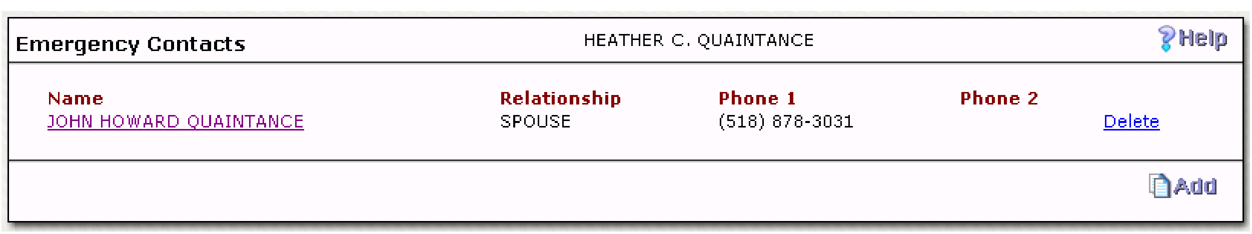


To add an Emergency Contact, click on Add in the lower right-hand corner.

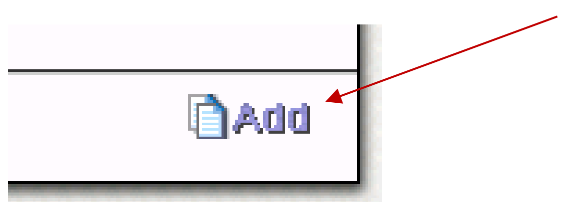
To make a change, click on the contact’s name and click on “Edit” in the lower right-hand corner. After you have made your updates, an option to the save the changes is available in the lower right-hand corner.

3.8. Family Info

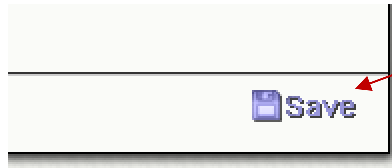
Click on “Family Info” on the EO Menu Bar and your family member information will be displayed as follows. To make a change, click on the family member’s name and click on “Edit” in the lower right-hand corner.



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

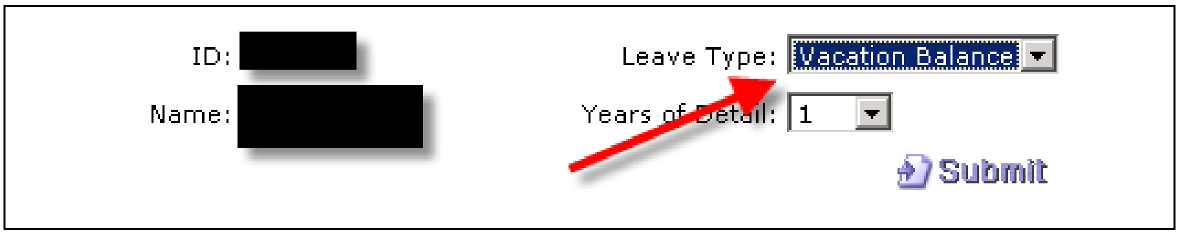


To make a change, click on the contact’s name and click on “Edit” in the lower right-hand corner. After you have made your updates, an option to the save the changes is available in the lower right-hand corner.

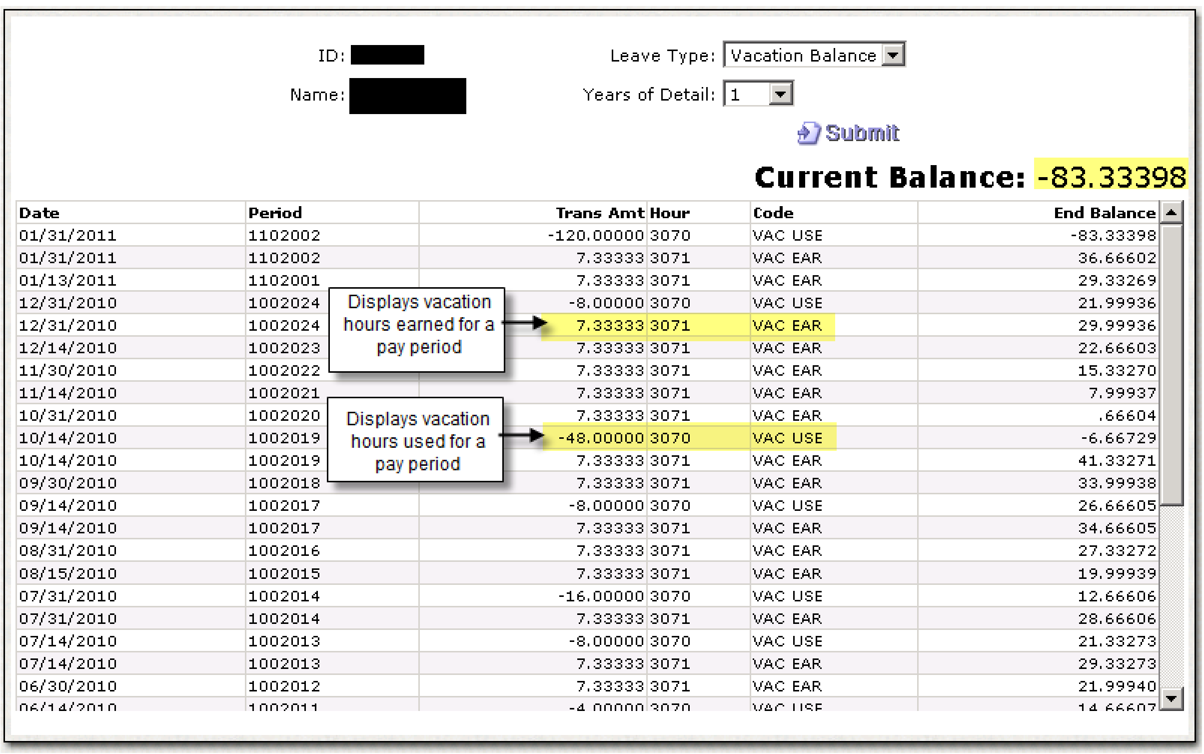


3.9. Vacation Leave Tracking

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.



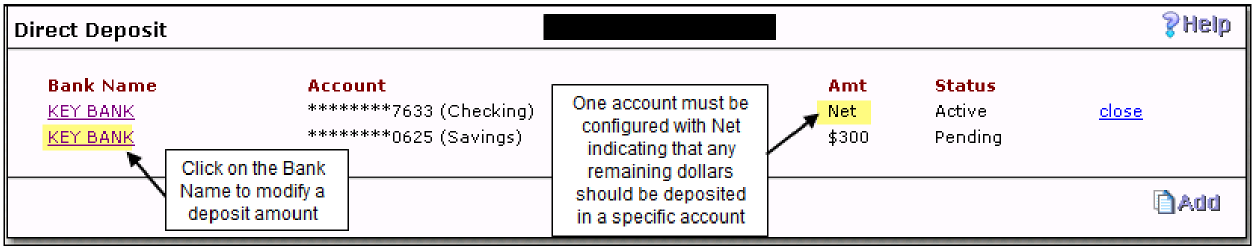
Clicking on Submit will display the following information. Vacation earned will be displayed for every pay period and vacation used will be displayed as processed by the Payroll department.



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

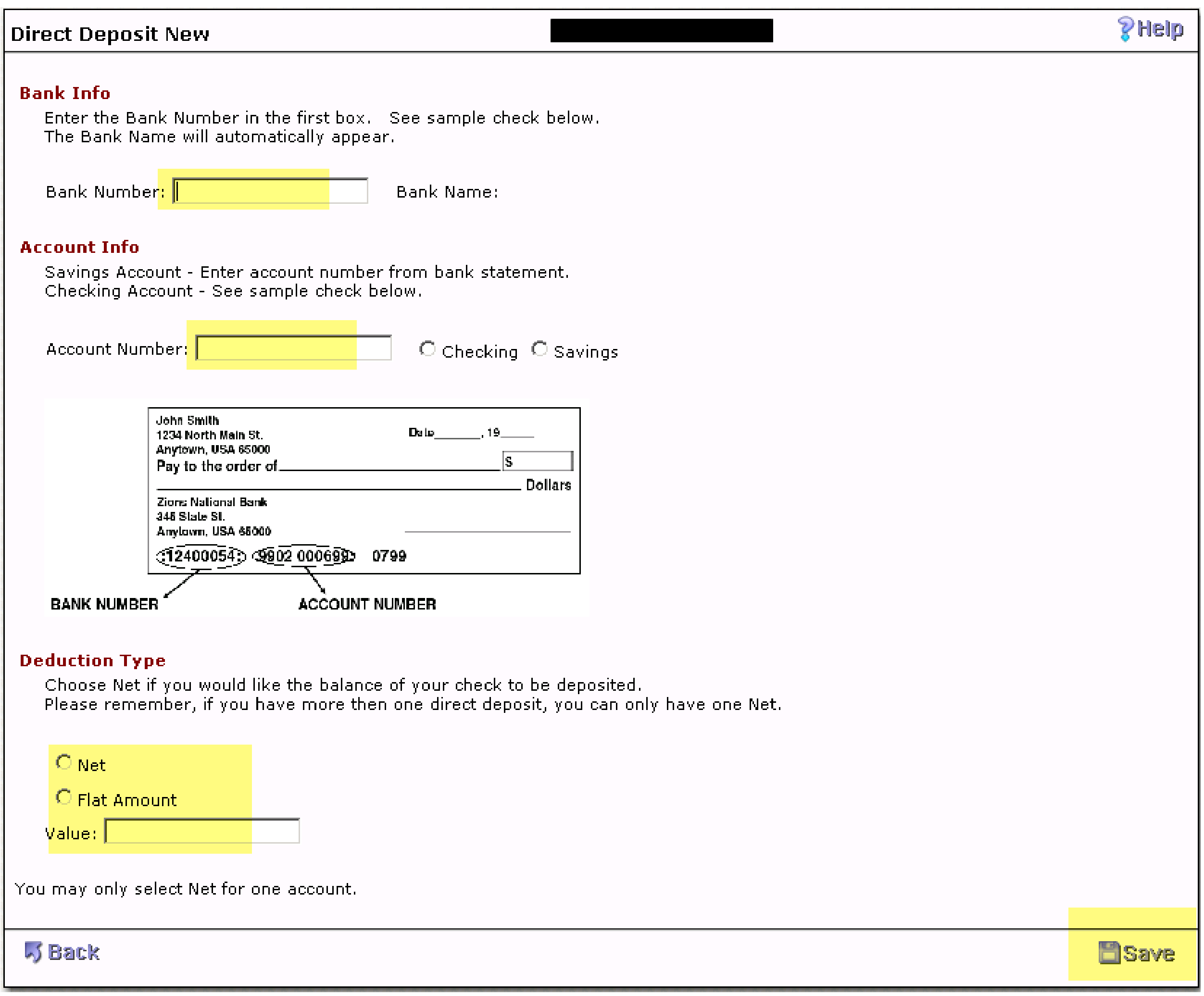
3.10. Direct Deposit

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.



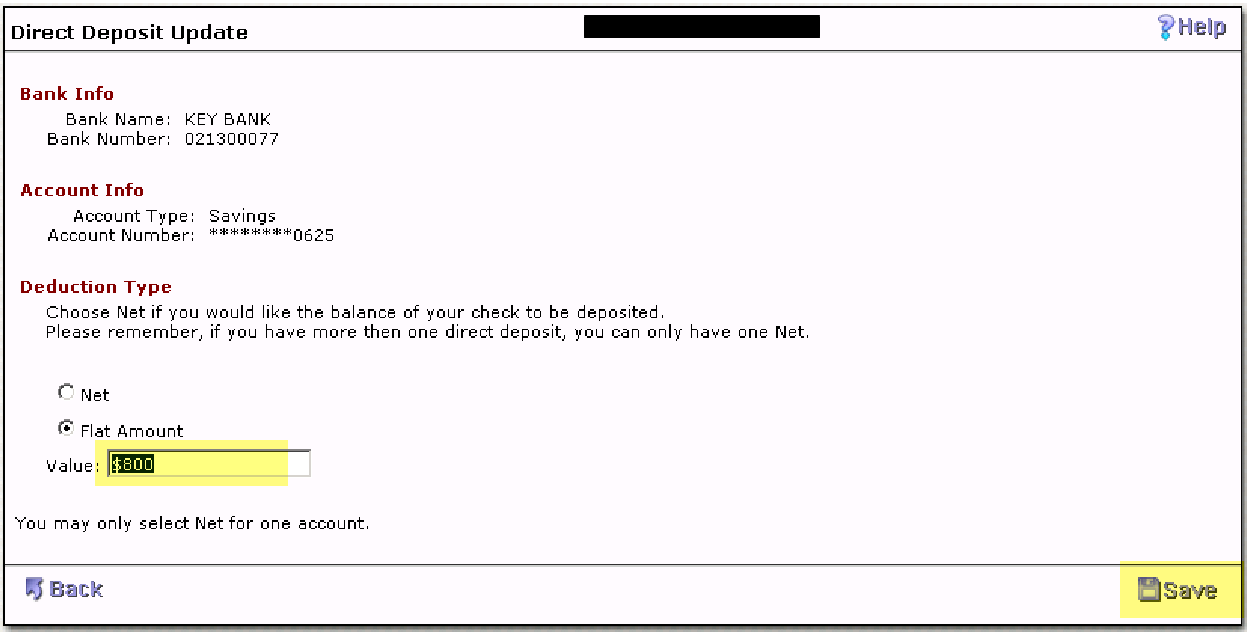
Statuses for bank accounts can be **Active** (indicating the deposit will be made on upcoming paydays), **Pending** (indicating that Payroll must process your change request before affecting your pay), and **Locked, Inactive** (indicating that the bank account is no longer being used)

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.



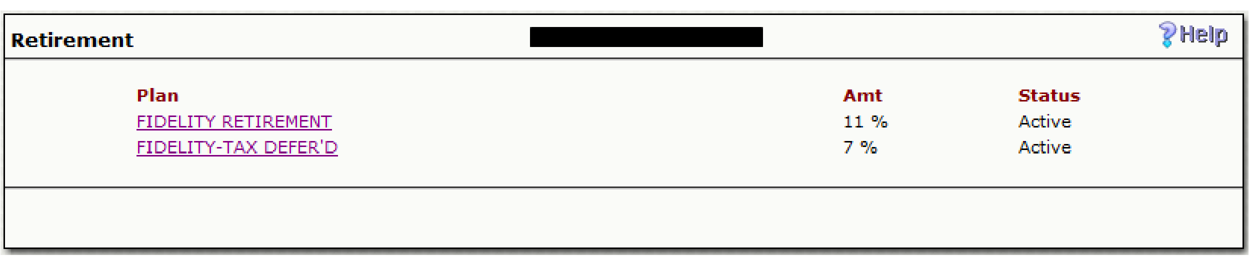
If you no longer wish to deposit your pay into a particular account, you may click on **close** to discontinue the direct deposit.

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:



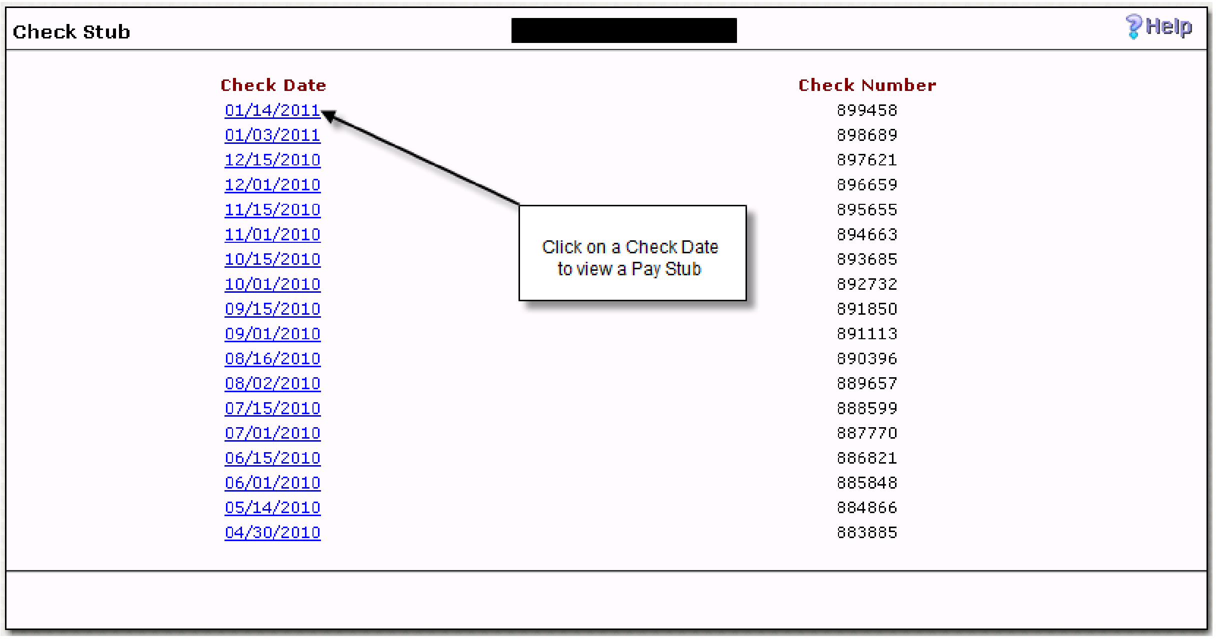
3.11. Retirement

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.



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 [redacted] 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

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 [redacted] Help

Federal Tax Record Status: Active

Filing Status: MARRIED Exemptions: 2

Additional Withholding: $40 IRS Flag:

State Tax Record Status: Active

Filing Status: MARRIED Exemptions: 2

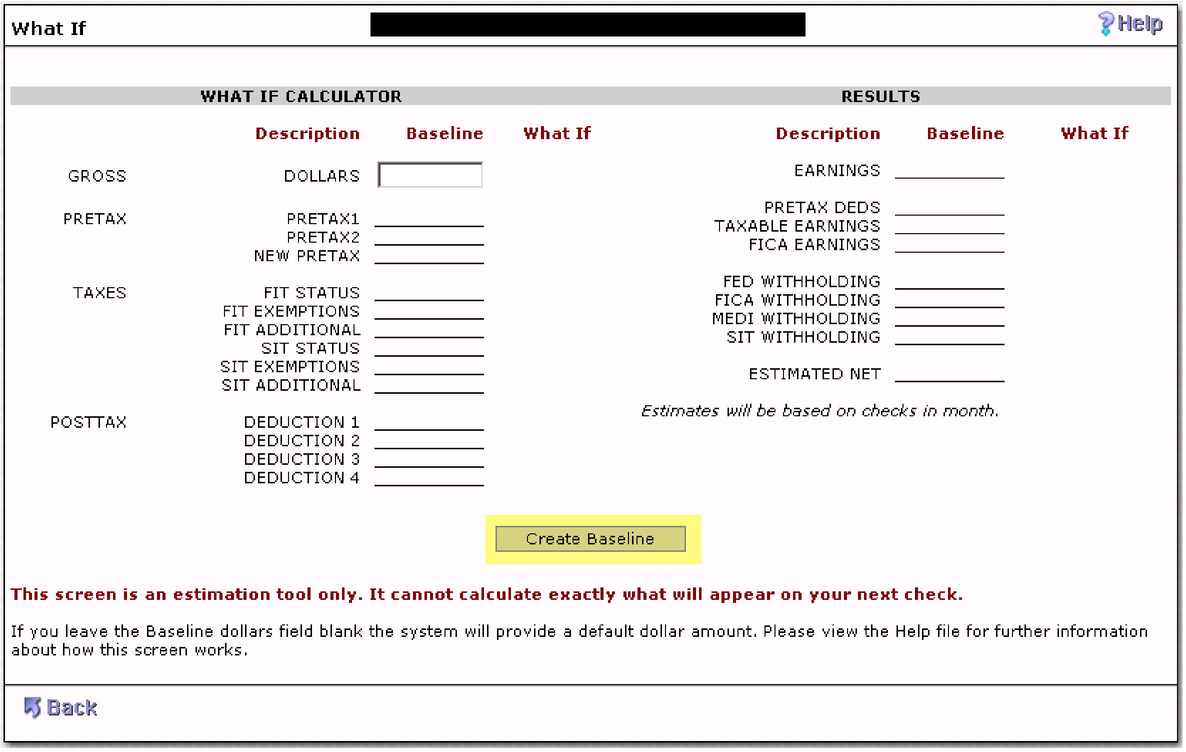
Additional Withholding: $

CLICK HERE TO DOWNLOAD W-4 FORM

Edit

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 [redacted] Help

WHAT IF CALCULATOR				RESULTS		
	Description	Baseline	What If	Description	Baseline	What If
GROSS	DOLLARS			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		
	SIT ADDITIONAL					
POSTTAX	DEDUCTION 1					
	DEDUCTION 2					
	DEDUCTION 3					
	DEDUCTION 4					

Estimates will be based on checks in month.

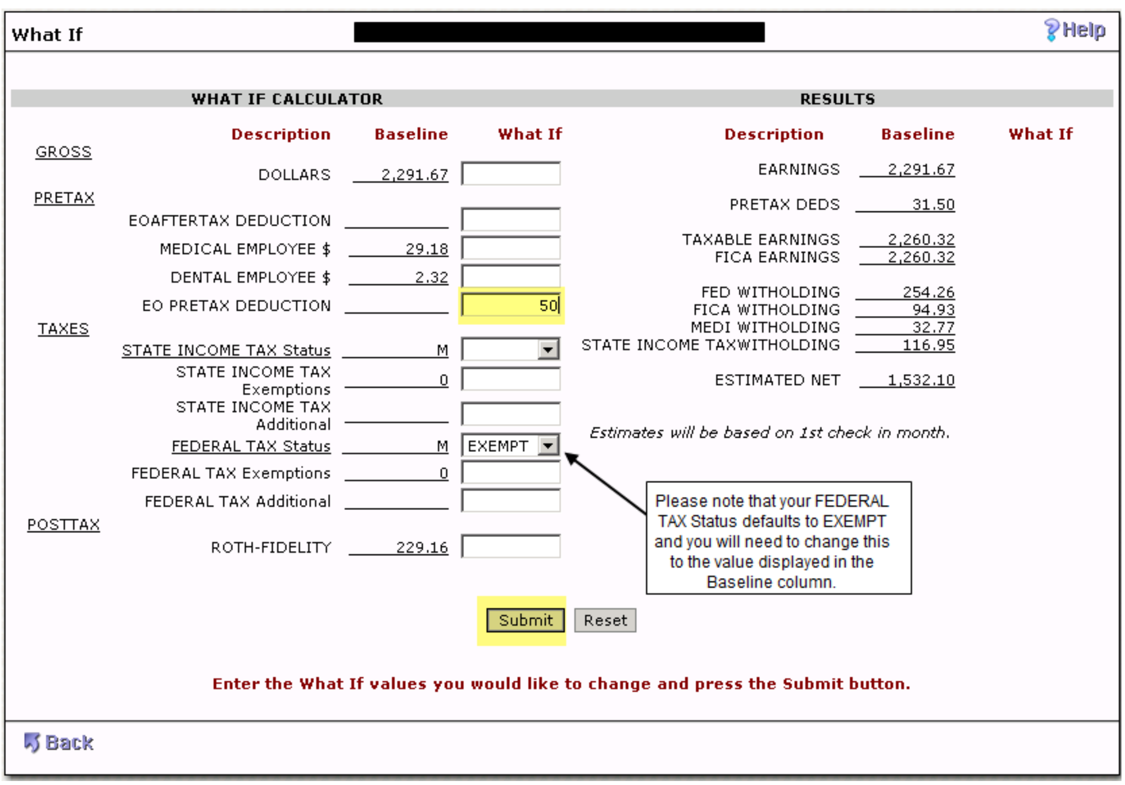
Create Baseline

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 [redacted] Help

WHAT IF CALCULATOR				RESULTS		
	Description	Baseline	What If	Description	Baseline	What If
GROSS	DOLLARS	2,291.67		EARNINGS	2,291.67	
PRETAX	EOAFTERTAX DEDUCTION			PRETAX DEDS	31.50	
	MEDICAL EMPLOYEE $	29.18		TAXABLE EARNINGS	2,260.32	
	DENTAL EMPLOYEE $	2.32		FICA EARNINGS	2,260.32	
	EO PRETAX DEDUCTION		50	FED WITHOLDING	254.26	
TAXES	STATE INCOME TAX Status	M		FICA WITHOLDING	94.93	
	STATE INCOME TAX Exemptions	0		MEDI WITHOLDING	32.77	
	STATE INCOME TAX Additional			STATE INCOME TAXWITHOLDING	116.95	
	FEDERAL TAX Status	M	EXEMPT	ESTIMATED NET	1,532.10	
	FEDERAL TAX Exemptions	0				
	FEDERAL TAX Additional					
POSTTAX	ROTH-FIDELITY	229.16				

Estimates will be based on 1st check in month.

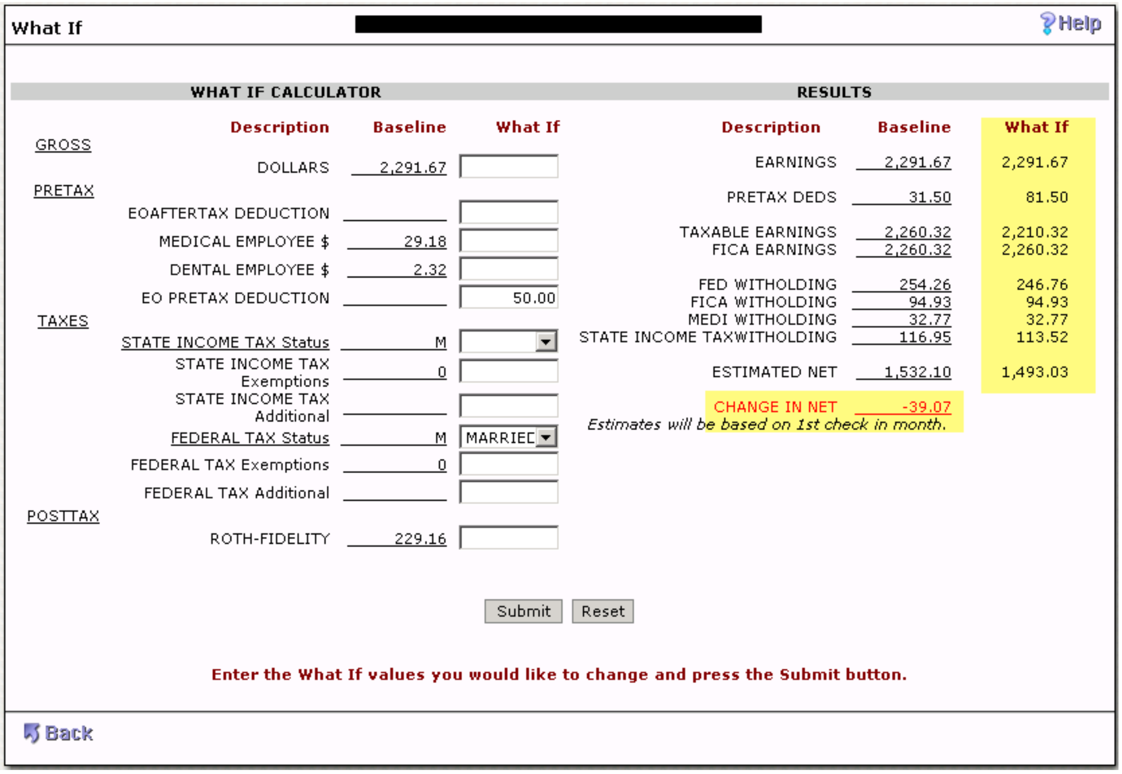
Please note that your FEDERAL TAX Status defaults to EXEMPT and you will need to change this to the value displayed in the Baseline column.

Submit Reset

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

Back

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:



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.

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.