Employee Online

User Manual
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1. **ACCESSING THE SYSTEM**

1.1. **Logging In**

1. Access [eo.union.edu](http://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.

Welcome to Union College's Employee Online web site. This site provides a way for you to view and, in some cases, keep your payroll and human resources information up-to-date.

Please feel free to browse your current payroll setup and make changes as needed.

Your next payday will be 2/1/2011. Requests made in Employee Online prior to midnight 1/27/2011 will be considered for the check of 2/1/2011.

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.

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

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 Form](image)

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.

| Emergency Contacts | HEATHER C. QUAINITE
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Relationship</td>
</tr>
<tr>
<td>JOHN HOWARD QUAINITE</td>
<td>SPOUSE</td>
</tr>
</tbody>
</table>

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 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. QUAINITE
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Relationship</td>
</tr>
<tr>
<td>JOHN HOWARD QUAINITE</td>
<td>SPOUSE</td>
</tr>
</tbody>
</table>

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 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.
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:

![Direct Deposit Update](image)

### 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.

![Retirement](image)

### 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.
3.13. **Tax Info**

The “Tax Info” page allows you 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.

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

<table>
<thead>
<tr>
<th>Description</th>
<th>Baseline</th>
<th>What If</th>
<th>Description</th>
<th>Baseline</th>
<th>What If</th>
</tr>
</thead>
<tbody>
<tr>
<td>Earnings</td>
<td>2,291.67</td>
<td></td>
<td>PRETAX DEDS</td>
<td>213.90</td>
<td>213.90</td>
</tr>
<tr>
<td>Medical Employee 3</td>
<td>234.18</td>
<td></td>
<td>TAXABLE EARNINGS</td>
<td>2,260.32</td>
<td>2,260.32</td>
</tr>
<tr>
<td>Dental Employee 3</td>
<td>2.32</td>
<td></td>
<td>FICA EARNINGS</td>
<td>2,260.32</td>
<td>2,260.32</td>
</tr>
<tr>
<td>EO PRETAX DEDUCTION</td>
<td>50.00</td>
<td></td>
<td>FED WITHHOLDING</td>
<td>264.56</td>
<td>264.56</td>
</tr>
<tr>
<td>STATE INCOME TAx Sata</td>
<td>0</td>
<td></td>
<td>FICA WITHHOLDING</td>
<td>943.93</td>
<td>943.93</td>
</tr>
<tr>
<td>STATE INCOME Tax</td>
<td>0</td>
<td></td>
<td>MED WITHHOLDING</td>
<td>32.77</td>
<td>32.77</td>
</tr>
<tr>
<td>STATE INCOME Tax</td>
<td>0</td>
<td></td>
<td>REDUCTION</td>
<td>-39.87</td>
<td>-39.87</td>
</tr>
<tr>
<td>ROTH-FIEdITY</td>
<td>229.14</td>
<td></td>
<td>CHANGE IN NET</td>
<td>1,932.10</td>
<td>1,493.03</td>
</tr>
</tbody>
</table>

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

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.