

# The Employee Portal - User Guide for Employees

The Employee Portal is a Web-based portal offering employees access to their payroll information via the Internet. Through the portal, employees can

- View and print payroll vouchers and W-2s
- Access their demographic data
- Request time off, and
- View paid time-off balances.

The Employee Portal can be used on tablets and mobile devices.

## Initial Login

There are 2 methods that may be used for initial login using the employee portal.

- **Assigned Username and Password:** This is used when your HR administrator has already assigned a username and password for you. They will give that information to you and then you may sign in. See instructions on Page 2.
- **New User Registration:** This is used when the administrators do not assign a username and password. Use your first Pay Stub to register and log into the Employee Portal. See instructions on Page 3.

## Initial Login to the Employee Portal - Assigned Username and Password

If you have received a Username and Password from your HR administrator, please use the method below to log into the Employee Portal.

1. Open a Web browser and enter the URL provided for access to the Employee Portal.

**Result:** The Login screen opens to the Secure User Login tab.

2. Enter the Username and Password assigned by the Administrator.
3. Click **Sign In**.

**Result:** The Settings screen opens, on which are Security Questions the user must set up for future login.

## Initial Login to the Employee Portal - New User Registration

If you have not been assigned a Username and Password and have been instructed to use the information from your first Pay Check Stub, use the method below for initial login into the Employee Portal

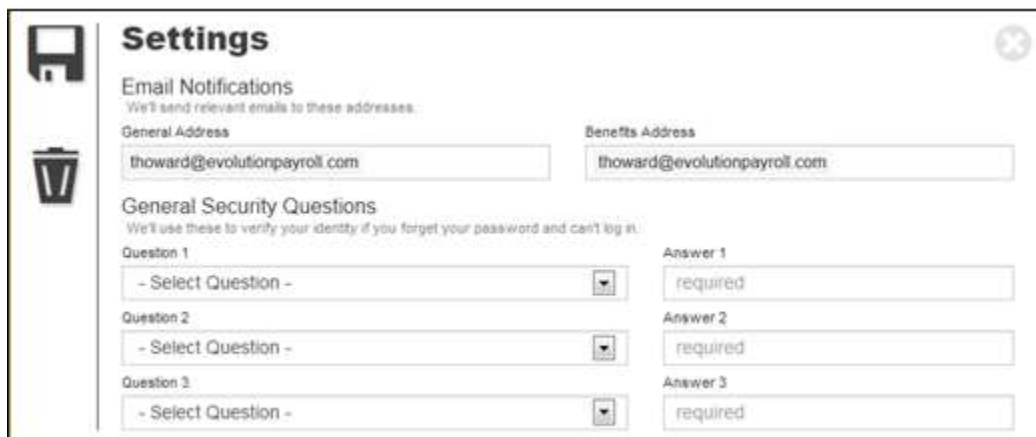
1. Open a Web browser and enter the URL provided for access to the Employee Portal.
2. Click on the New User Registration.

The screenshot shows the 'New User Registration' page. At the top, there are three tabs: 'Secure User Login', 'New User Registration' (which is active), and 'Forgot Password'. The page is divided into two main sections: 'Setup Your Credentials' and 'Provide Pay Information'.  
Under 'Setup Your Credentials', there are three input fields: 'Login Name' (containing 'Kandy'), 'Password' (masked with asterisks), and 'Confirm Password' (also masked). A red asterisk note below the password field states: '\*Minimum length must not be less than 5 characters'. A 'Register Me' button is located at the bottom left of this section.  
Under 'Provide Pay Information', there are four input fields: 'Company Code' (containing 'WEB300-1'), 'SSN' (containing '999-99-9999'), 'Check Number' (containing '1758'), and 'Current Total Earnings' (containing '1280.00').


3. Choose and Enter a username and password. Repeat the password in the confirm password box.
4. Enter the Company Code, SSN, Check Number and Gross Earnings from your **most current** pay stub.
5. Click on **Register Me**

**Result:** The Settings screen opens, on which are Security Questions the user must set up for future login.

## Security Questions



The screenshot shows a 'Settings' page with a sidebar containing a save icon and a trash icon. The main content area is divided into two sections: 'Email Notifications' and 'General Security Questions'. The 'Email Notifications' section includes a sub-header 'Email Notifications' and a note 'We'll send relevant emails to these addresses:'. Below this are two text input fields: 'General Address' and 'Benefits Address', both containing the email 'thoward@evolutionpayroll.com'. The 'General Security Questions' section includes a sub-header 'General Security Questions' and a note 'We'll use these to verify your identity if you forget your password and can't log in.'. Below this are three rows, each with a 'Question' dropdown menu and an 'Answer' text input field. The dropdown menus are currently set to '- Select Question -' and the answer fields contain the word 'required'.

1. Select three General Security Questions from the dropdown lists and enter the answers on the right.
2. Select two Extra Security Questions from the dropdown lists and enter the answers on the right.
3. Click the **Save**  button.

**Result:** the Employee Portal Dashboard opens.

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**Note:** The next time the user logs in, two of the pre-selected security questions will be displayed, that the user will need to answer.

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# Dashboard

## Employee Identification

The employees' first and last name displays in the header when logged into the portal.

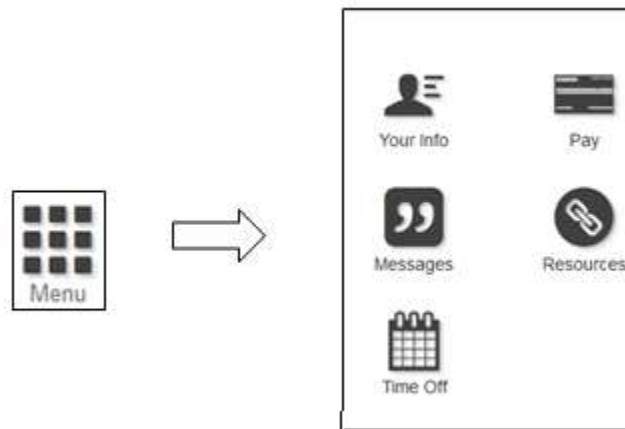
## Navigation Buttons

There are several buttons in the upper right corner of the Dashboard used to navigate the application.



**Home Button**

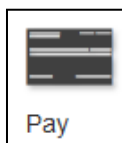
1. Click the **Home** button from anywhere in the application to be brought back to the Dashboard.



2. Click the **Menu** button to access additional menu buttons to the screens on which to enter information to be displayed on the Dashboard.



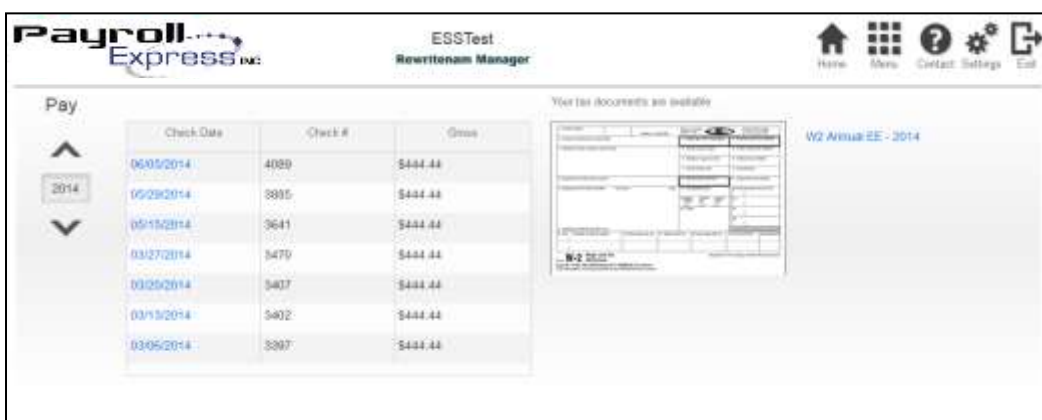
3. Click the **Your Info** button to view the information displayed in the Your Info section on the Dashboard from wherever you are in the application. The information on this screen can only be edited by the manager.



- Click the **Pay** button to view the information displayed in the Pay section on the Dashboard, from wherever you are in the application.



- Select the year if applicable, to see previous years' checks.



- The most recent W-2 and 1099 forms are also available and can be clicked to view.
- Click the **check date** to view the check stub for that payment date.

**Preview**

**Janis Lewis**

Company: WEB300 - 1    Period Begin: 12/16/2013    Division

Division: 4    Period End: 12/22/2013    Branch

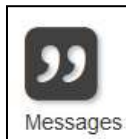
Social Security #: XXX-XX-3448    Check Date: 12/22/2013    Department

Base Date: 10/22/2012    Check Number: 1731    Title

**Sweetarts (ESS/WebClient)**    812 Hestrey Lane  
Hestrey PA 16813 800-288-1872

Vacation 38.000000-0.000000-0.000000 100%

Earnings				Deductions				
Description	Location / Job	Rate	Hours	Pay/Calendar	Year To Date	Description	Current	Year To Date
Regular		17.50	48.00	798.00	-4200.00	Fed (M2) (650.00)	34.84	267.24
		0.00				OKSDI (650.00)	48.30	244.90
		0.00				Medicare (650.00)	9.43	57.29
		0.00				PA (SM2) (650.00)	19.96	121.28
		0.00				PA-EE SUN(700.00)	8.49	2.84
		0.00				SPRUCE CREEK TWIF Res(650.00)	11.00	67.15
		0.00				Health	50.00	250.00
<b>Total Earnings</b>				48.00	798.00	<b>Total Deductions</b>	165.27	1010.80
<b>NET PAY</b>		534.73	<b>Total Direct Deposits</b>		0.00	<b>Check Amount</b>	534.73	3189.20

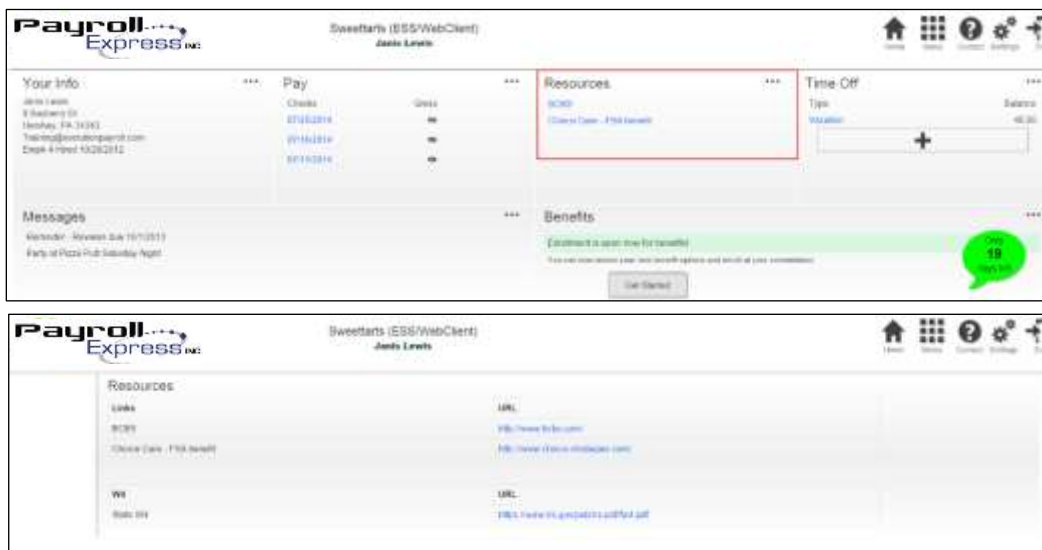


- Click the **Messages** button to view messages displayed in that section on the Dashboard, sent to the user by the Group Manager. The messages are displayed as links that direct the user to the item where action is required.

Messages are displayed on the Dashboard, and also viewed by clicking the **Messages** button above. The screen below has fields in which managers may have entered text. This page is read only for users who are not managers.



- Click the **Resources** button to view links displayed in the Resources section on the Dashboard. These links are pre-defined by the Group Manager.




- Click the **Time Off** button to view time off balances also displayed in the Time Off section on the Dashboard.

### Submitting a Time off Request

To submit a Time off Request

- Click the large **Plus** sign at the bottom of the Time Off section on the Dashboard.  
The Time off Request screen opens:
- Select the type of Time off Request being submitted (Personal time, Sick time, etc.)
- Select the **Start Date** and **End Date** of the time period.

Once the dates are entered, the days are listed in the list on the right, where the hours can be edited as needed. Each date is listed on a separate line and totaled at the bottom.

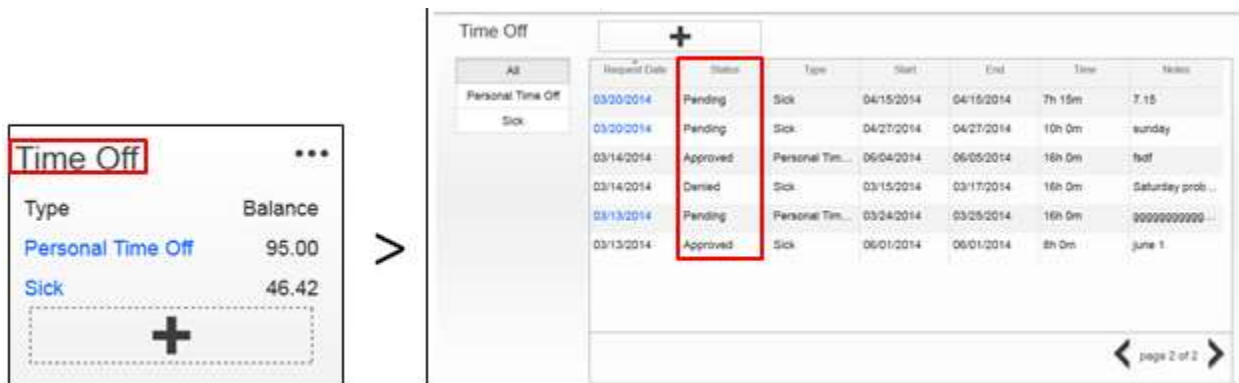
- Enter the **Hours per Day** requested.
- Select the **Include weekends** checkbox if the time request includes weekend days that would normally be worked.
- Enter any notes if applicable (optional).
- Edit hours on the right side of the screen, if applicable.
- Click the **Save**  button to submit for approval.

**Result:** The manager receives a message, or your request is added to the total number of requests awaiting approval.

To view the status of Time off Requests,



### Click Time Off on the Dashboard



**Note:** Employees can modify previously-submitted Time off Request, as long as they are still in “Pending” status. To modify, click the Request date and make the changes. Click **Save**. Once they have been approved, the employee cannot make changes.