Introduction to Employee Self Service

All SHARE Users
Welcome to the Introduction to the Employee Self Service (ESS) course! I am Eddie Self Service and I will be your guide today. Let us begin with the course agenda.

Course Introduction

Lesson 1: View Timesheets and Enter Time

Lesson 2: Manage Personal Information

Lesson 3: View Paycheck and Compensation

Lesson 4: View Benefits

Course Summary
Course Introduction

This Web-Based Training (WBT) course provides an overview of the Employee Self Service portal and explains its different sections.

This course takes approximately 60 minutes to complete. Make sure you take the final assessment at the end!
Course Introduction

This Web-Based Training (WBT) course provides an overview of the Employee Self Service portal and explains its different sections.

This course provides a high level overview of the Employee Self Service portal and is applicable for all SHARE users.
Course Introduction

This Web-Based Training (WBT) course provides an overview of the Employee Self Service portal and explains its different sections.

Upon completion of this course, you should be able to:

- Provide an overview of Employee Self Service
- View Timesheets and Enter Time
- Manage Personal Information
- View your Paycheck and Compensation
- View Benefits and Dependent/Beneficiary Information
Agenda

Course Introduction

Lesson 1: View Timesheets and Enter Time

Lesson 2: Manage Personal Information

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Lesson 4: View Benefits

Course Summary
View Timesheets and Enter Time

By the end of this lesson, you will be able to:

- Provide an overview of the Employee Self Service (ESS) portal
- Access your timesheet
- Enter your time
- Review your Reported Time
Highlights of This Section

Here are the new and exciting features of Time Reporting!

- **Positive Time Reporting**: employees enter all of their hours worked, vacation, and leave time into SHARE every week.

- **Streamlined timesheets**: your timesheets are now much easier to navigate and will only have the columns you need.

- **Reorganized Time Reporting Codes (TRCs)**: TRCs will now display in order of most to least commonly used to make time reporting easier for you!
Key Terms

Take a moment to familiarize yourself with the key terms used through the course.

- **Reported Time**: Time you enter and submit in your timesheet. The time you submit has to be approved by your supervisor and run through the Time Administration process to turn into Payable Time.
- **Payable Time**: The approved and processed time that is eligible for payment.
- **TRCs**: Time Reporting Criteria, which outline the rules and guidelines for time entry and approval.
- **Time Period**: The specific time frame for which timesheet entries are made, such as a week or a month.
Key Terms

Take a moment to familiarize yourself with the key terms used through the course.

- **Reported Time**: Time that is approved by your supervisor, run through the Time Administration process, and is reflected in your paycheck.
- **Payable Time**: Time that is approved by your supervisor, run through the Time Administration process, and is reflected in your paycheck.
- **TRCs**: Time Periods Reconciliation Codes
- **Time Period**:
Take a moment to familiarize yourself with the key terms used through the course.

**Reported Time**

**Payable Time**

**TRCs**

**Time Period**

Time Reporting Codes (TRCs) are used to identify the type of time you can report, for example, Regular Hours, Extra Hours, Annual Leave, and Sick Leave.
Key Terms

Take a moment to familiarize yourself with the key terms used through the course.

- Reported Time
- Payable Time
- TRCs
- Time Period

Time Period refers to the multiple ways you can view your timesheet. You can view it by day, week or pay period (biweekly).
Key Terms

Take a moment to familiarize yourself with the key terms used through the course.

Calendar Period

A two week time period that includes the hours reflected on your paycheck or pay advice. In your timesheets, Calendar Period is the same as pay period.

Exceptions

Paycheck Modeler

Positive Time Reporting
Key Terms

Take a moment to familiarize yourself with the key terms used through the course.

- Calendar Period
- Exceptions
- Paycheck Modeler
- Positive Time Reporting

Exceptions, or errors, are violations of your predefined schedule. The most common exception is when an employee incorrectly reports Regular Hours Worked (REGHR) during a holiday.
Key Terms

Take a moment to familiarize yourself with the key terms used through the course.

- Calendar Period
- Exceptions
- Paycheck Modeler
- Positive Time Reporting

The Paycheck Modeler is used to simulate paychecks through ESS. You can create your own “What If” scenarios to see what your paycheck will look like if you change your hourly rate, tax deductions, and tax withholdings.
Key Terms

Take a moment to familiarize yourself with the key terms used through the course.

Calendar Period

Exceptions

Paycheck Modeler

Positive Time Reporting

Positive Time Reporting means you submit the actual hours worked and/or taken as leave for approval every week. Managers receive a notification to approve employees’ timesheets and employees will be paid based on the Reported Time on approved timesheets.
The **Employee Self Service (ESS)** portal, previously known as Self Service, provides immediate access to your personal information. You can review and make edits to this information directly in SHARE 9.2. The ESS portal home page is organized in tiles as shown below:

**Timesheet Entry**
- Enter your time here.

**Payroll**
- You can view your pay advices and paycheck information here.

**Personal Details**
- View and update your personal information such as name and address, personal email and emergency contacts.
Access Timesheets

Timesheets enable you to view and report time. You can access your timesheet from the Employee Self Service **Timesheet Entry** tile or from the **NavBar**.

**Lesson 1**

Access your timesheet through the **Timesheet Entry** icon to save time!
Report Time: Submit Timesheet Details

Time reporting tracks your **Scheduled** and **Reported** hours.

1. **Calendar View**
   You can select different timesheet views: **Calendar Period, Day, or Week.**

2. **View by Day**
   - **TIP:** Calendar Period is the same as pay period.
   - **TIP:** Select the desired timesheet view period and click the **Refresh** icon to update the view period.

3. **View by Week**
Report Time : Submit Timesheet Details (Cont.)

Time reporting tracks your **Scheduled** and **Reported** hours.

1. **Specify the Date.**

2. You can view your **Scheduled Hours** and **Reported Hours** for the selected date.

3. **TIP:** Add more rows to report time under two or more different TRC’s.

4. Enter your Time and **TRC** here. Click **Submit** after entering your time. Report your hours under **REGHR TRC** or another **TRC**.

View your: **Reported Time Status**, **Summary**, **Leave/Compensatory Time Details**, **Exceptions**, and **Payable Time**.
Timesheets allow you to add or delete rows to submit your time under two or more TRC’s.

1. Click > Add button icon on your timesheet
2. A new row displays in your timesheet. Enter > Time in hours in the field
3. Select > TRC from the Time Reporting Code drop-down menu for the new time entry
4. Click > Submit to save your time
5. Click > OK on your Timesheet Submit Confirmation page. You have successfully submitted your time for the selected time period
6. Click > Delete button icon to delete a row in your timesheet. Select Yes – Delete on the Delete Confirmation page to delete the row from your timesheet.

Note: After you add or delete a row, click Submit to save your time.
Report Time : Submit Timesheet Details (Cont.)

Time reporting tracks your **Scheduled** and **Reported** hours.

<table>
<thead>
<tr>
<th>Date</th>
<th>Reported Status</th>
<th>Total TRC</th>
<th>Description</th>
<th>Sched Hrs</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/30/2017</td>
<td>Needs Approval</td>
<td>8.00 ANNLV</td>
<td>Annual Leave Taken</td>
<td>8.00</td>
<td></td>
</tr>
</tbody>
</table>

The **Reported Time Status** tab gives you an overview of the time you have reported. If the status requires approval from your manager, the **Reported Status** field displays **Needs Approval**. Other **Reported Status** fields are **Approved** and **Denied** if your manager has approved or rejected the time you submitted.

**TIP**: Click the comment bubble to view any comments your manager made.

**TIP**: If your time is denied, you need to correct and resubmit your timesheet.
Report Time: Submit Timesheet Details (Cont.)

Time reporting tracks your **Scheduled** and **Reported** hours.

The **Summary** tab gives you an overview of your **Paid Leave**, **Total Reported Hours**, and **Total Scheduled Hours** on a weekly basis.
Report Time: Submit Timesheet Details (Cont.)

Time reporting tracks your **Scheduled** and **Reported** hours.

<table>
<thead>
<tr>
<th>Reported Time Status</th>
<th>Summary</th>
<th>Leave / Compensatory Time</th>
<th>Exceptions</th>
<th>Payable Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Reported Status</td>
<td>Total</td>
<td>TRC</td>
<td>Description</td>
</tr>
<tr>
<td>01/30/2017</td>
<td>Needs Approval</td>
<td>8.00</td>
<td>ANNLV</td>
<td>Annual Leave Taken</td>
</tr>
</tbody>
</table>

The **Leave and Compensatory Time** tab provides leave and compensatory time balances to date.

**TIP**: Your maximum amount of personal comp hours varies based on your schedule and by agency.
Report Time : Submit Timesheet Details (Cont.)

Time reporting tracks your **Scheduled** and **Reported** hours.

<table>
<thead>
<tr>
<th>Reported Time Status</th>
<th>Summary</th>
<th>Leave / Compensatory Time</th>
<th>Exceptions</th>
<th>Payable Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Reported Status</td>
<td>Total</td>
<td>TRC</td>
<td>Description</td>
</tr>
<tr>
<td>01/30/2017</td>
<td>Needs Approval</td>
<td>8.00</td>
<td>ANNLV</td>
<td>Annual Leave Taken</td>
</tr>
</tbody>
</table>

The **Exceptions** tab displays violations of your predefined schedule. Exception errors display a clock icon 🕒.

**TIP:** Exceptions, or errors, can impact pay; reach out to your Human Resources Administrator to clear them.
Time reporting tracks your **Scheduled** and **Reported** hours.

The **Payable Time** tab shows the time that has been approved, processed by system rules, and converted to payable time. **Reported Time** does not appear on this tab immediately.

You can view payable time by:

- **Time Reporting Code (TRC) and Status**, also known as payable time summary
- **Time Reporting Code, Status, and Day**
Submit Timesheet Details: Key Points

Following are a list of points you should remember while filling your timesheet:

- **Time Reporting Codes** (TRCs) appear in order of most to least used.

- There are four types of timesheets. We have modeled the most commonly used one. The other three include: combo codes, special rule processing, and project codes. You can view the Timesheets Job Aid to see the other timesheets.

- If your time is denied you can check the comments from your time approver to view why the time was denied. Then, you can change the time entry and resubmit your hours.

- Holidays are automatically populated in the **Payable Time** tab of your timesheet. If, for example, you try to enter regular hours worked during a holiday, you will get a warning message.

- You can add multiple rows to report time, one row per TRC.

- If approved **Reported Time** is changed, you will get an email notification indicating who changed the time. The new reported hours will have to be approved.
View Time

View your **Monthly Schedule, Time, Exceptions, and Payable Time Detail** in this section. Follow the navigation path below to access the **View Time** section:

Click > **NavBar** > **Navigator** > **Self Service** > **Time Reporting** > **View Time**

The information you see here is similar to what you see under the Report Time section we just talked about!
In this lesson we learned:

- How to navigate to the Employee Self Service portal and its specific functions
- How to enter your time using the Time Reporting Codes and submit for approval
- Timesheets give you an overview of Reported Time Status, Summary, Leave/Compensatory Time details, Exceptions and Payable Status
- Timesheets allow you to change the view to Calendar, Day, and Week
- The View Time menu allows you to view your time reported and Payable Time Detail
Course Introduction

Lesson 1: View Timesheets and Enter Time

**Lesson 2: Manage Personal Information**

Lesson 3: View Paycheck and Compensation

Lesson 4: View Benefits

Course Summary
Manage Personal Information

By the end of this lesson, you will be able to:

- Access the Personal Information section
- Modify your personal details: Address, Contact Details, Ethnic Group and Emergency Contacts
- Submit a request to your Human Resources (HR) Administrator to modify your Name and/or Marital Status
Highlights of This Section

Here are the new and exciting features of Personal Information!

- **Quick access to personal information and benefits:** you can view your address, contact information, emergency contact, as well as your benefits and dependents’ information with just one click.

- **Edit personal information:** in SHARE 9.2 you can edit some personal information including your address, contact details, personal email, emergency contact, and more! You can also request a name and marital status change, but need to submit the proper documentation to your HR Administrator.
Access: Personal Information

You can view and modify some of your personal information through SHARE 9.2. You can access your personal details through the **Personal Details** tile or the **Navigator**.

**TIP**: Access your personal details through the icon to save time!

Click > **NavBar** > **Navigator** > **Self Service** > **Personal Information**
Manage Personal Information: Address

Modify your **Home/Mailing** address in the **Home Address** section. You can click to make your updates.

You can click the arrow icon to view the **Address** window.

Update the **Home/Mailing** Address details in the window and click **Save**.

**TIP:** Verify your home and mailing address (if different from home address) are entered correctly.

Note: SHARE 9.2 allows you to modify your **Address**, **Contact Details**, **Ethnic Group**, and **Emergency Contact** details.
Request for Update: Personal Information

Submit a request to modify your **Name** and **Marital Status**. You must provide a copy of your updated Social Security Card to your HR Administrator for approval.

Complete the details on the **Name** change window and click **Save** to submit a request to the HR Administrator. You must show HR your new Social Security Card for your name change to be approved.
Additional Information displays your **Gender**, **Date of Birth**, **Birth Country**, **Birth State**, **Social Security Number**, **Start Date**, and other personal information.

Note: The State of New Mexico does not track employees’ smoker history.
Manage Personal Information Summary

In this lesson we learned:

☑ SHARE 9.2 allows you to modify your Address, Contact Details, Ethnic Group, and Emergency Contact Details

☑ SHARE 9.2 allows you to submit a request for Name change and Marital Status change
Agenda

Course Introduction

Lesson 1: View Timesheets and Enter Time

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Course Summary
View Paycheck and Compensation

By the end of this lesson, you will be able to:

- Access the Payroll and Compensation section
- View your Pay Advice
- Use the Paycheck Modeler
- Manage W-2/W-2c forms
Highlights of This Section

Here are the new and exciting features of Paycheck and Compensation!

- **Paycheck Modeler**: in Employee Self Service (ESS) you can create “What If” scenarios to see what your paycheck would look like if your salary changed or you modified your deductions or tax withholdings.

- **W-2 form**: now you can see your W2 in ESS, request to receive your W-2 form electronically, and ask to reissue your W-2 – with just one click!
Access: Paycheck and Compensation

SHARE 9.2 allows you to view your paycheck and compensation information. You can click the Payroll tile to view your Pay Advice and Tax Withholdings.

You can click the right arrow to view your Pay Advice.
View your Pay Advice

View your Pay Advice in the Pay section. SHARE 9.2 allows you to choose the number of pay advices to view at a time.

You can click the Filter icon and select the desired time period to view your Pay Advice.

<table>
<thead>
<tr>
<th>Check Date</th>
<th>Company</th>
<th>Pay Begin Date / Pay End Date</th>
<th>Net Pay</th>
<th>Paycheck Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/25/2016</td>
<td>State of New Mexico</td>
<td>11/05/2016 / 11/18/2016</td>
<td>$1955.65</td>
<td>5889945</td>
</tr>
<tr>
<td>09/16/2016</td>
<td>State of New Mexico</td>
<td>09/27/2016 / 09/09/2016</td>
<td>$2407.37</td>
<td>5867995</td>
</tr>
<tr>
<td>09/02/2016</td>
<td>State of New Mexico</td>
<td>08/13/2016 / 08/25/2016</td>
<td>$2385.37</td>
<td>5846270</td>
</tr>
</tbody>
</table>
Access: Paycheck and Compensation

SHARE 9.2 allows you to use the **Navbar** to view more information related to your paycheck and compensation.

Click > **Navbar** > **Navigator** > **Self Service** > **Payroll and Compensation**

- View your paycheck related information.
- Use the **Paycheck Modeler** to calculate your earnings with hypothetical values.
- Request a reissue of your W-2 form.
- Access W-2/W-2c forms.
- Submit or withdraw your consent to receive electronic W-2 or W-2c forms.
Use the Paycheck Modeler

Use the Paycheck Modeler to view what your paycheck could be if you changed your earnings, deductions, and/or tax withholding status. The Paycheck Modeler starts with your current paycheck and allows you to perform “What If” scenarios.

The following “What If” scenarios are examples you can create via the Paycheck Modeler:

- You got a promotion and your hourly pay will increase by a certain number of dollars
- You want to add health coverage for a new dependent, which affects your healthcare contribution amounts, taxes, and net pay
- You just got married and want to see the effect of changing your tax withholding status on your net pay

Note: The Paycheck Modeler provides an estimate of your paycheck. It does not represent your actual paycheck.
View W-2/W-2c Forms

SHARE 9.2 allows you to view your year-end W-2/W-2c forms. New W-2 forms will be available on or before January 31st of each year. Follow the navigation path below to access your forms.

Click > NavBar > Navigator > Self Service > Payroll and Compensation > View W-2/W-2c forms

To view the form for a different tax year, select the tax year under View a Different Tax Year.

1. Click > Year End Form to view your form

TIP: Filing Instructions provides the instructions to file your year-end W-2/W-2c forms.

Note: You can find more information on your W-2 forms on the SHARE Collaboration Site link: share.state.nm.us\collaboration_home.html.
Submit Consent to Receive W-2/W-2c Forms

SHARE 9.2 allows you to submit or withdraw your consent to receive electronic W-2 or W-2c forms as well as submit a request to reissue your W-2/W-2c forms.

1. Enter your written agreement to submit or withdraw your consent to receive electronic W-2 or W-2c forms in the space provided

2. Click the check box to indicate your consent to receive electronic W-2 and W-2c forms and Click > Submit

Note: A dialog box appears to submit your consent to receive electronic W2 forms. In the comment box type: “I consent to receive only an electronic copy of my W-2 form(s)”.
Submit Reissue Request for W-2 Form

Request a reissuance of a printed copy of your W-2 form by submitting a reissue request.

Verify your **Home Address** and select where you want the W-2 form to be delivered.

1. Enter a year in **W2 Request for Year** and select > **Mailing Address**

2. Click > **Submit**

Note: You can select **Home Address**, **Mailing Address**, or **Work Location** as an option to get the W-2 form delivered.
View Paycheck and Compensation Summary

In this lesson we learned:

- How to navigate to the Payroll and Compensation section and its components
- Paycheck Modeler allows you to view a hypothetical paycheck with changed earnings, deductions, and/or tax withholding status
- SHARE 9.2 allows you to view your W-2/W-2c forms and submit a request to reissue your W-2 form
Agenda

Course Introduction

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Course Summary
View Benefits

By the end of this lesson, you will be able to:

- Access the Benefits section
- Review Flexible Spending Accounts Activity
- View your Benefits Summary
- View your Dependent/Beneficiary Information
Access: Benefits Section

Follow the navigation path below to access the **Benefits** section.

Click > **NavBar** > **Navigator** > **Self Service** > **Benefits**

- View your **Flexible Spending Accounts** Activity.
- View your **Healthcare Dependent Summary**.
- View your **Benefits**.
- View your **Dependent and Beneficiary Information**.
Benefits Information: Review Flexible Spending Accounts Activity

The **Flexible Spending Accounts (FSAs)** page allows FSA enrolled employees to view detailed information such as your annual pledge, balance, claims detail, and claims payment detail.

Follow the steps below to review your **Flexible Spending Account** status for a specific year.

1. Enter a **Year** and click > **Go**

Flexible Spending Account(s) display.

2. Select the **Spending Account** from the enrolled accounts listed to view your account summary

Note: For more information on your benefits navigate to the following site: [http://www.mybenefitsnm.com/](http://www.mybenefitsnm.com/).
Health Care Dependent Summary: View List of Dependents

View your dependents by **Name** and **Type of Benefit** under the **HealthCare Dependent Summary** section. The **HealthCare Dependent Summary** displays benefits plans and allows you to view your covered dependent details under each plan.

Click > **NavBar** > **Navigator** > **Self Service** > **Benefits** > **Dependents and Beneficiaries** > **Health Care Dependent Summary**

Follow the steps below to view your **Health Care Dependent Summary**:

1. **Select > Date**
2. **Click > Go**

<table>
<thead>
<tr>
<th>Type of Benefit</th>
<th>Description</th>
<th>Name</th>
<th>Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical</td>
<td>Presbyterian Pre-Tax</td>
<td><strong>Leah Hamilton</strong></td>
<td>Child</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Eric Hamilton</strong></td>
<td>Child</td>
</tr>
<tr>
<td>Dental</td>
<td>Delta Dental Pre-Tax</td>
<td><strong>Eric Hamilton</strong></td>
<td>Child</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Leah Hamilton</strong></td>
<td>Child</td>
</tr>
<tr>
<td>Vision</td>
<td>Davis Vision Pre-Tax</td>
<td><strong>Eric Hamilton</strong></td>
<td>Child</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Leah Hamilton</strong></td>
<td>Child</td>
</tr>
</tbody>
</table>
View Benefits Summary

The **Benefit Summary** section provides information on your benefits with **Plan Description** and **Coverage** details.

Click > ** NavBar > Navigator > Self Service > Benefits > Benefits Summary**

This section allows you to view plans you and your dependents/beneficiaries are enrolled in.

Follow the steps below to view your **Benefits Summary**:  

1. **Select > Date**  
2. **Select > Go**
View Dependent/Beneficiary Information

SHARE 9.2 allows you to view your dependents and their benefit plans. Follow the navigation path below to access the Dependent/Beneficiary Information section:

Click > NavBar > Navigator > Self Service > Benefits > Dependent/Beneficiary Information

<table>
<thead>
<tr>
<th>Name</th>
<th>Relationship to Employee</th>
<th>Date of Birth</th>
<th>Marital Status</th>
<th>Student</th>
<th>Disabled</th>
<th>Dependent</th>
<th>Beneficiary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leah Hamilton</td>
<td>Child</td>
<td>06/28/2012</td>
<td>Single</td>
<td>No</td>
<td></td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Eric Hamilton</td>
<td>Child</td>
<td>06/28/2012</td>
<td>Single</td>
<td>No</td>
<td></td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

View your Dependent and Beneficiary Information here. Click a name to display the Dependent/Beneficiary Personal Information.

View your Dependent/Beneficiary personal details.
View Benefits Summary

In this lesson we learned:

✔ How to navigate to the Benefits Section and its components

✔ The Flexible Spending Accounts section allows FSA enrolled employees to view detailed information such as annual pledge, balance, claims detail, and claims payment detail

✔ The HealthCare Dependent Summary displays benefits plans and allows you to view your covered dependent details under each plan

✔ The Benefits Summary section allows you to view plans you and your dependents/beneficiaries are enrolled in
Agenda

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Course Summary

In this course we learned:

✔ Timesheets allows you to enter your time and view Reported Time, Summary, Leave/Compensatory Time, Exceptions, and Payable Time Details

✔ SHARE 9.2 allows you to modify your Address, Contact Details, Ethnic Group, and Emergency Contacts and submit a request to your HR Admin to modify your Name and/or Marital Status

✔ SHARE 9.2 allows you to view your paycheck related information in the Pay section. Paycheck Modeler allows you to perform “What If” scenarios

✔ The Benefit section provides information on your benefits, with Plan Description and Coverage details. SHARE 9.2 allows you to view your FSA and Health Care Dependent Summary
Help is Available!

You have additional resources available for support.

1. Ask your HR Administrator or other SHARE experts in your agency
2. Navigate to the SHARE Collaboration Center Job Aids section
3. Look at the Q&A Forum in the Share Collaboration Center
4. Submit a Helpdesk ticket to EnterpriseSupport Desk@state.nm.us