PeopleSoft

Employee Self-Service (ESS)

Version 4.9 | Updated July 17, 2024

san diego county office of
EDUCATION
FUTURE WITHOUT BOUNDARIES℠

PREPARED BY SDCOE PEOPLESOFT SUPPORT

For additional information about this publication, please contact PeopleSoft Services and Solutions Team at 858-298-2203 or submit a Service Portal ticket.

Contents

About This Guide

This guide was created by the PeopleSoft Support Team to introduce users to PeopleSoft Employee Self-Service (ESS) at https://ess.erp.sdcoe.net.

This is a web-based system that allows you to

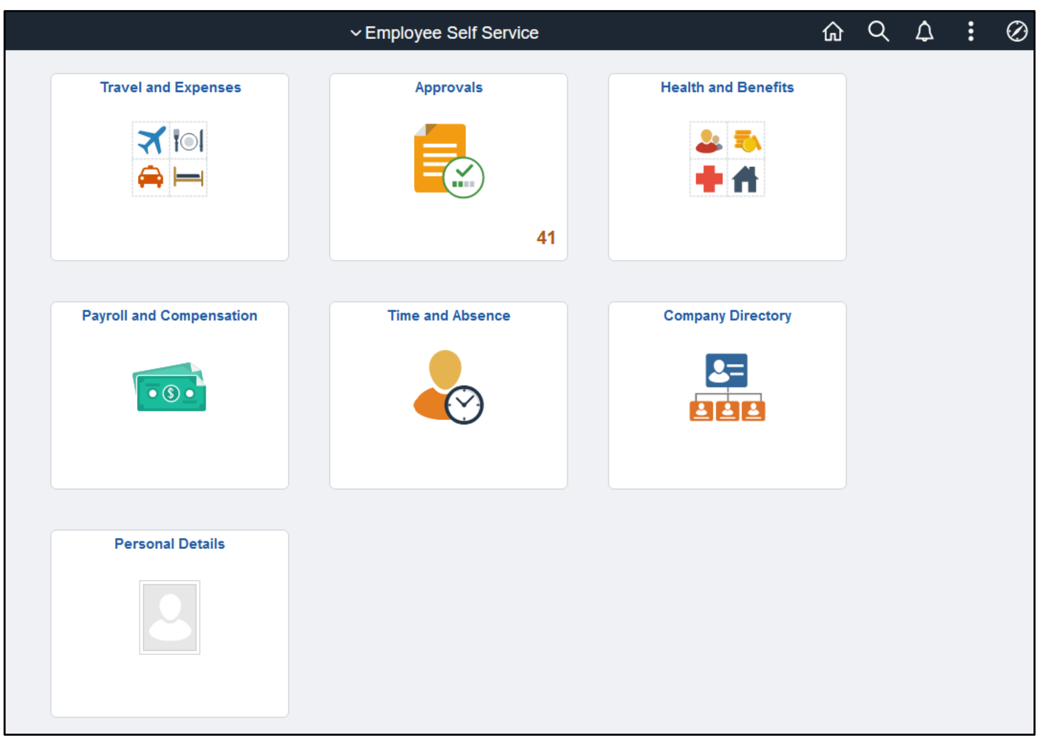
- View your paycheck
- Review and update your personal information
- Update your Peoplesoft profile
- Review your benefits information *(may not apply to all districts)*
- Enter travel requests and expense reports *(may not apply to all districts)*
- Enter absence requests and view absence balances *(may not apply to all districts)*
- Approve absence requests and transactions (managers only) *(may not apply to all districts)*

For additional copies of this guide, please go to https://crc.sdcoe.net/resources/ess-and-general-info-training-materials

Homepage

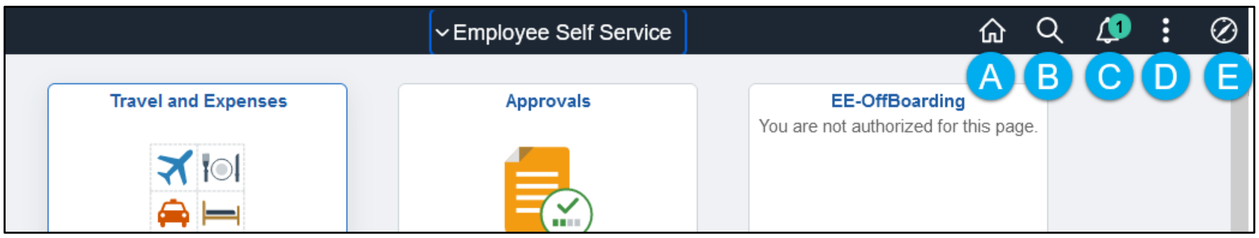
The Home Page is the first screen you see when logging into PeopleSoft Employee Self-Service (ESS). https://ess.erp.sdcoe.net

The tiles you see will be based on functionality for your district. The sections in the guide correspond to the tiles.



Toolbar

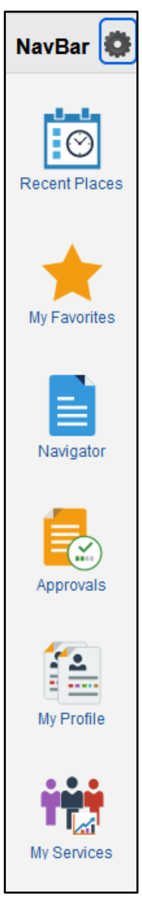
At the top of each page is the toolbar with several useful tools.



A. **Home Icon:** Allows the user to return to the home page from whatever page they are currently viewing.
B. Global Search Icon: This feature has been enhanced so you can easily search for things in ESS like your paycheck or W-2.
C. Notifications:
D. Action List Icon (three vertical dots menu):

- Add to Favorites – allows the user to add frequently used items to the Favorites page
- My Preferences – sets user preferences such as date/time format, navigation personalization, and pop-up notification
- Sign Out – signs the user out of PeopleSoft

E. NavBar Icon: Allows users to access Resources, Recent Places, Navigator and My Favorite pages.



Recent Places: Users can access recently viewed pages.

My Favorites: Users can add, delete, and edit favorite pages.

Approvals: Provides access to your approval list same as the tile on the homepage.

My Profile:

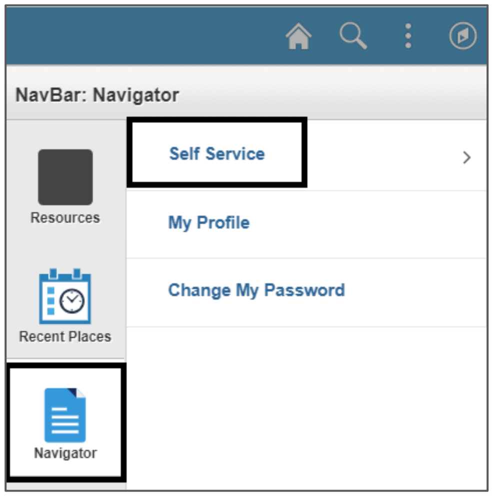
- Links to change password
- Change or set up forgotten password help
- Alternate User setup
- Email setup

My Services: Has links to:

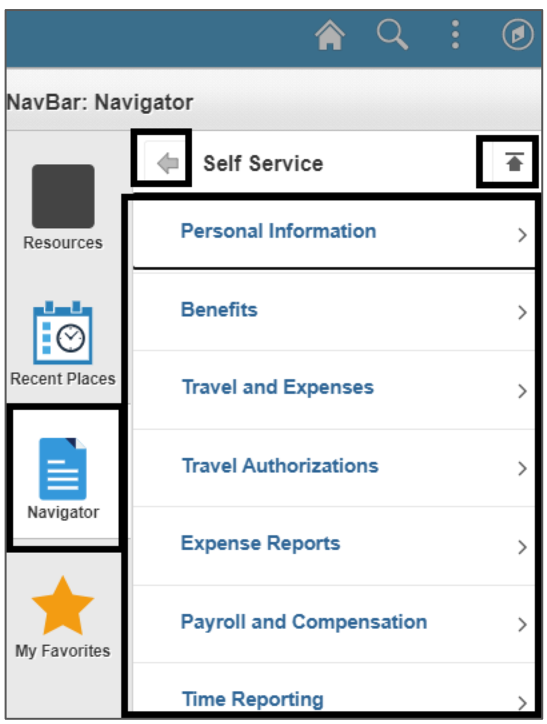
- Announcements
- Guides and Job Aids
- HR Dashboard
- CBO Dashboard
- Support Calendar
- Training and Events webpage
- System Status webpage
- ServiceNow
- Customer Advisory Board webpage.

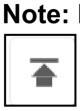
Navigator: Provides another way to access different PeopleSoft components depending on user security/roles. This is helpful since not all components are available under Quick Links.

Click on Self Service to access Self Service module. This is just like using breadcrumbs in the previous PeopleSoft version.



Click on the module to access



Note: Back arrow  that will take you back one level in the navigation. Up arrow  will take you back to the main menu with Self Service.

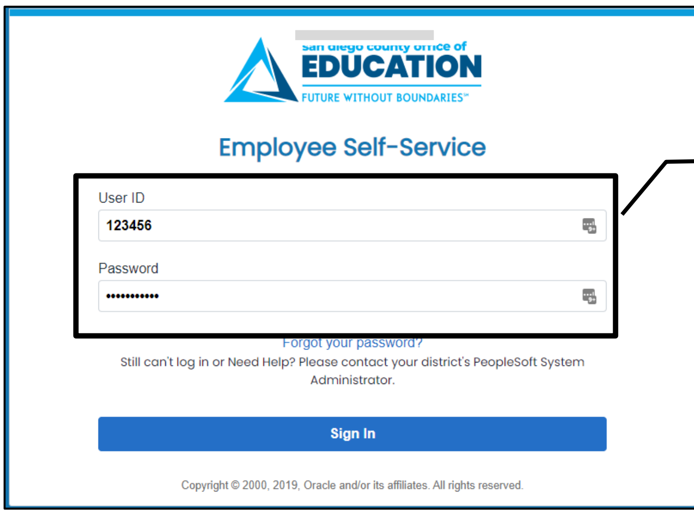
Part I: PeopleSoft Log in and Password Set up

Logging Into ESS

This URL takes you to the PeopleSoft Employee Self-Service (ESS) homepage. It can be accessed from any **computer or mobile device.** https://ess.erp.sdcoe.net

1. Go to https://ess.erp.sdcoe.net. This is the URL for PeopleSoft Employee Self-Service (ESS).
2. Log in with your PeopleSoft User ID and password.
   - If **you are a new user**, you will be forced to change your temporary password the first time you log in. See next page for instructions (p.6).

NOTE: If you have already used PeopleSoft Finance or HCM, continue to use your existing password.



USER ID:
- User ID = Your employee ID without hyphens.
- *Example: 123456*

PASSWORD:
- *You will be given a TEMPORARY password by your district's IT department.*
- *You will be prompted to reset the password.*

System will lock you out after 5 attempts. Contact your district to get it unlocked.

HOW TO GET HELP

If you cannot log in or are experiencing issues, please contact your district's PeopleSoft contact.

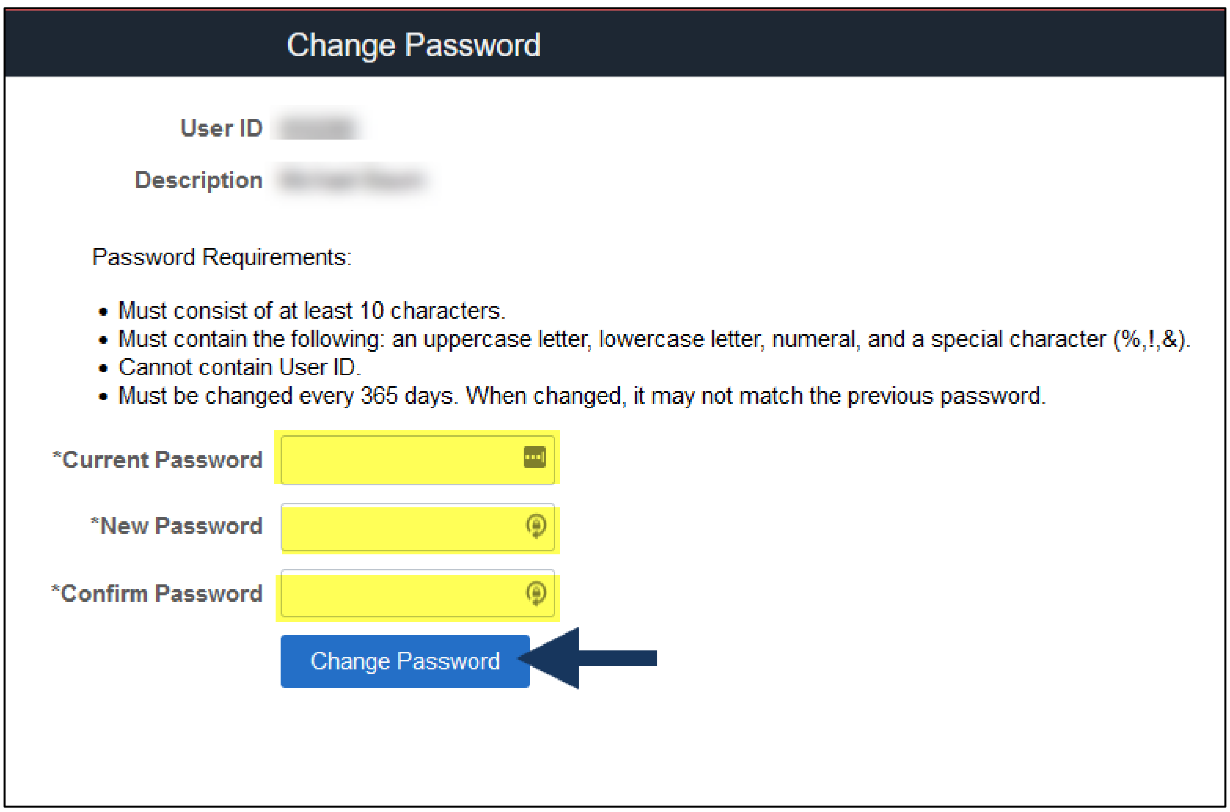
Provide your name, User ID, and a description of the problem. If necessary, the district PeopleSoft contact will work with the SDCOE PeopleSoft Support Team to resolve the issue.

Changing Your Password

First Login

On your first login, you will be prompted to change your temporary password. You will need to change your password every 365 days.

1. When prompted, enter your current password.
2. Type a new password twice following the password requirements:
   - Must consist of at least 10 characters
   - Must contain the following: an upper-case letter, a lowercase letter, numeral and a special character (%, &)
3. Click **Change Password**. Remember, your password is case sensitive.

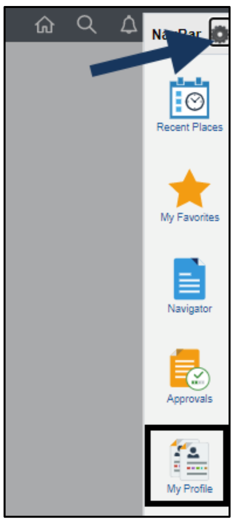


4. Upon changing your password, please enroll in “I Forgot My Password” (p.7) so you can easily reset a forgotten or expired password on your own.

Setting Up "I Forgot My Password" – VERY IMPORTANT!

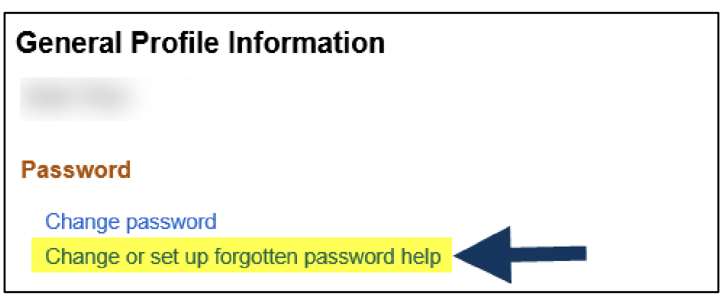
Select a ***security question and verify your email address****. It is very important that you set this up! It will save you time in the future in the case that you forget your password or if it expires.*

Directions: Go to **NavBar and click on My Profile icon**. The General Profile Information page opens. Be sure to complete Parts 1 & 2.

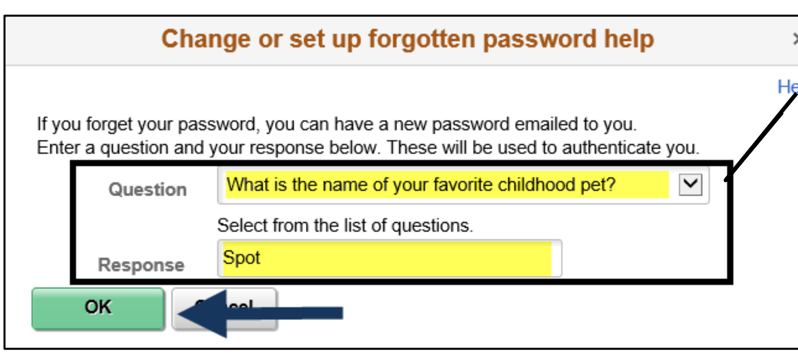


PART 1: SECURITY QUESTION:

1. Click the link that says **Change or set up forgotten password help.**



2. Select a **security question** and enter a **response**, then click **OK**. Your response is *not* case sensitive.



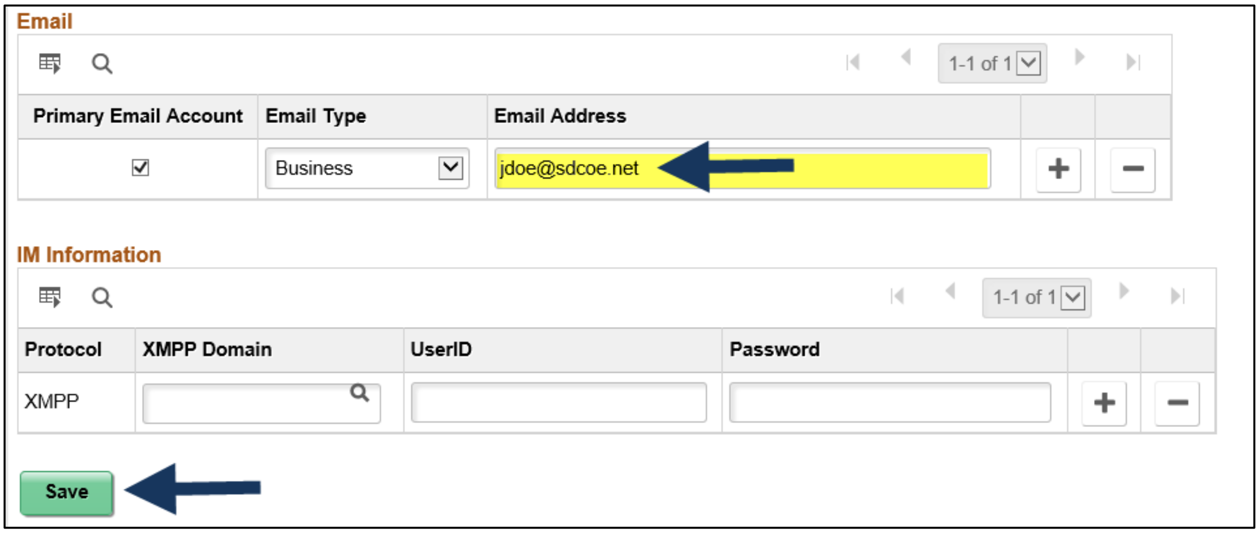
SELECT A QUESTION:

- What is the name of your childhood best friend?
- What is the name of your favorite actor?
- What is the name of your favorite childhood pet?
- What is your favorite food?
- What is your favorite hobby?
- What is your favorite vacation spot?
- What street did you grow up on?
- Who is your favorite cartoon character?
- Who is your favorite childhood hero?

TYPE A RESPONSE:
Enter a response you will remember later!
What you type is not case sensitive, so don't worry about upper/lowercase letters. (Your PeopleSoft password, however, *is* case sensitive).

PART 2: EMAIL ADDRESS:

1. In the Email section, **verify/enter your email address**. This will be the address that a temporary password is sent to in the case that you forget your password. This is also the address that is used for absence request email notifications sent to and from your manager.
    a. Make changes in the email address box
    b. Check box to the left of the email address that will be your **Primary Email Account**
    c. Additional emails can be added for informational purposes



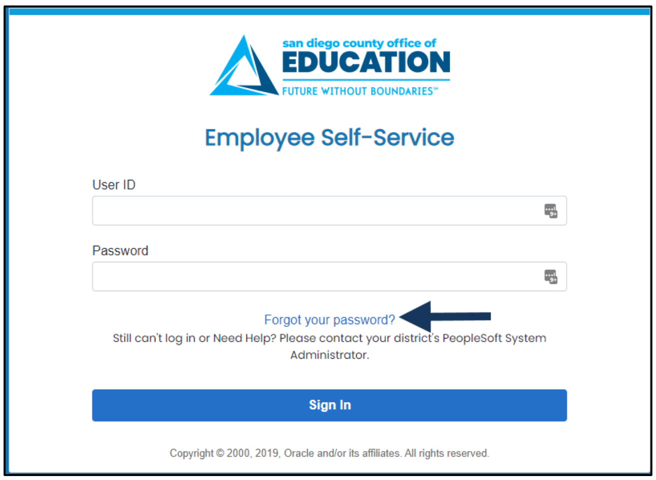
2. Click **Save** to save your changes.
3. If necessary, click **Home** to go to the Home page.

Resetting a Forgotten or Expired Password

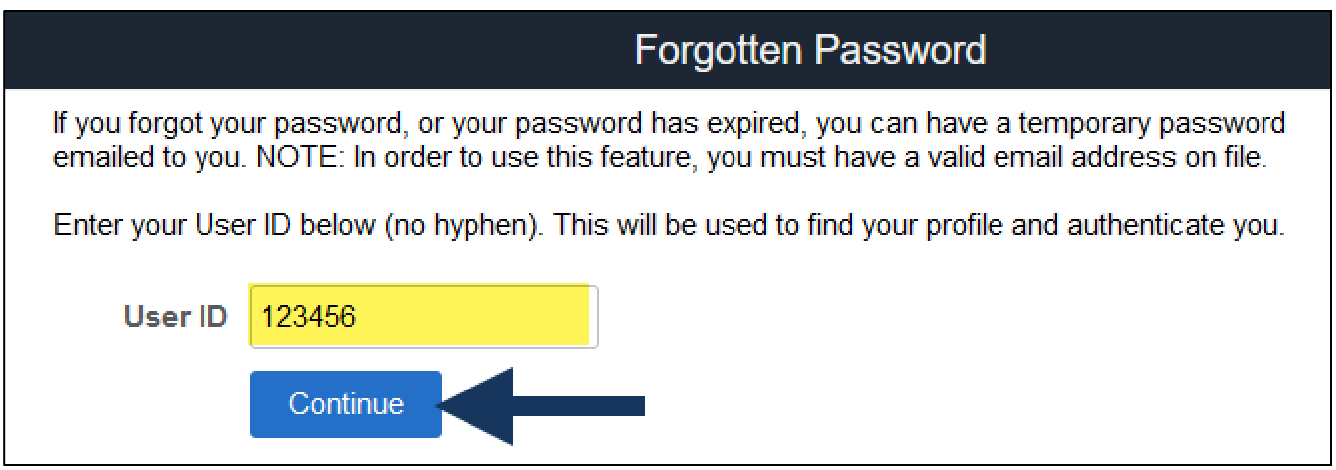
You may follow these directions to reset a forgotten or expired password if you have previously set up "I Forgot My Password" (p.7). If you did not set this up, please contact your district's PeopleSoft Security Administrator and ask them to reset your password. Be sure to enroll in "I Forgot My Password" for future use!

Directions:

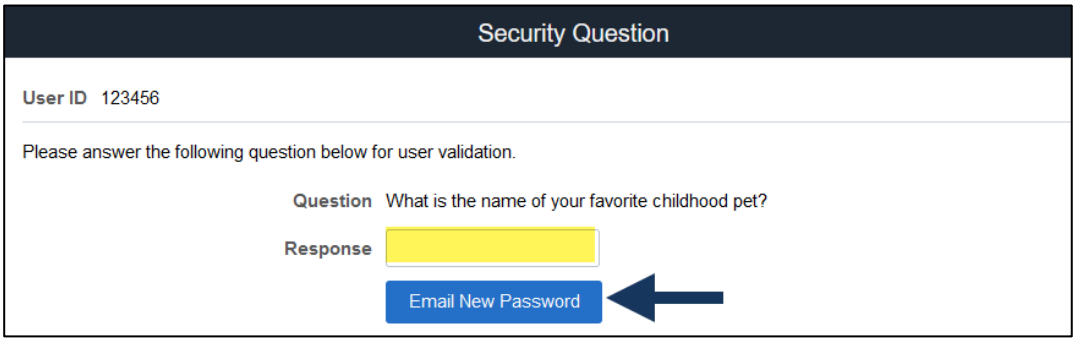
1. Go to https://ess.erp.sdcoe.net. This is the URL for PeopleSoft Employee Self-Service (ESS).
2. Click **Forgot My Password**.



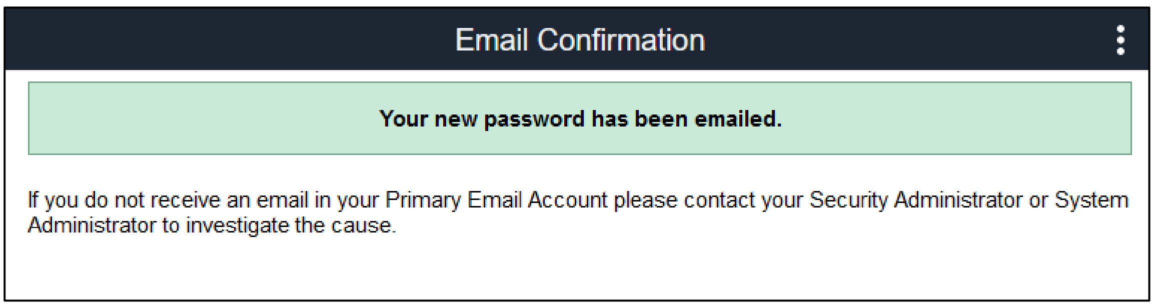
3. Enter your six-digit User ID (no hyphen). Click **Continue**.



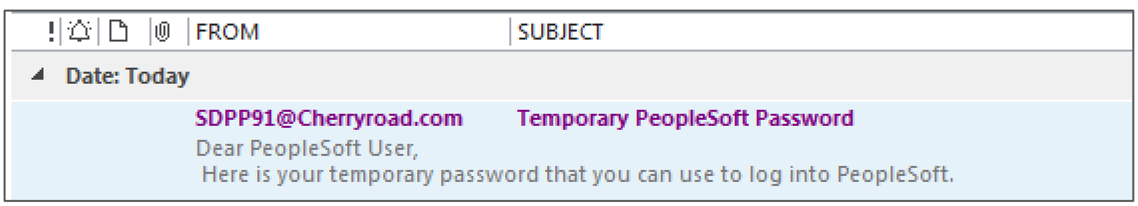
4. Type the answer to your security question (not case sensitive). Click **Email New Password**.



5. The screen will say, “Your password has been emailed.” You can now close this window/tab.

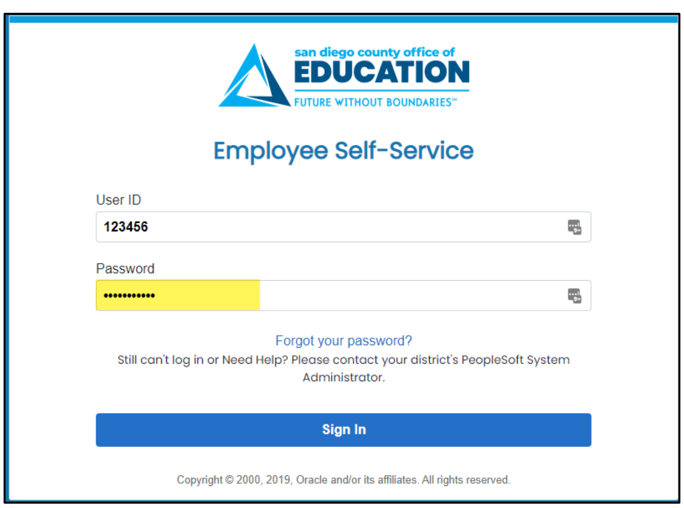


6. **Check your email account** associated with your PeopleSoft user. Open the message titled *Temporary PeopleSoft Password*. It will contain a temporary password.

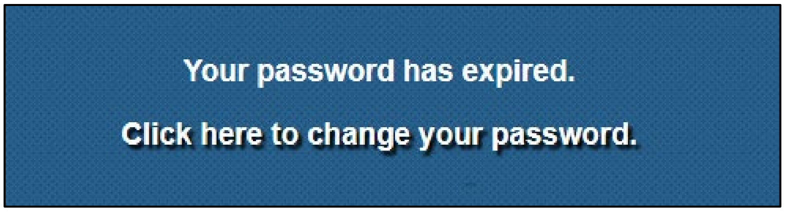


7. Use Ctrl+C to **copy the temporary password** (like *eBDu]2pW*, for example) found in the email message.

8. Go back to the login page at https://ess.erp.sdcoe.net. **Enter your User ID** (six-digit employee ID) and **temporary password.** For ease, use Ctrl+V to paste your temporary password. Click **Sign In**.

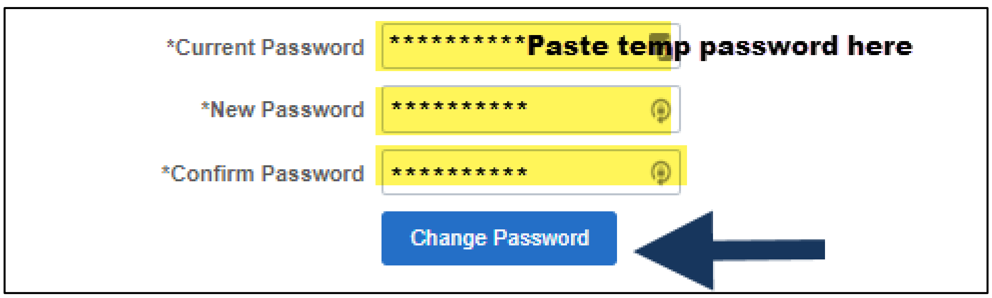


9. You will see a message that says, “Your password has expired. Click here to change your password.” Click the link.



10. For **Current Password paste in the temporary password.**

11. Create a New Password that matches the password requirements and enter it twice.
    - Must consist of at least 10 characters
    - Must contain the following: an upper-case letter, a lowercase letter, numeral and a special character (%, &)

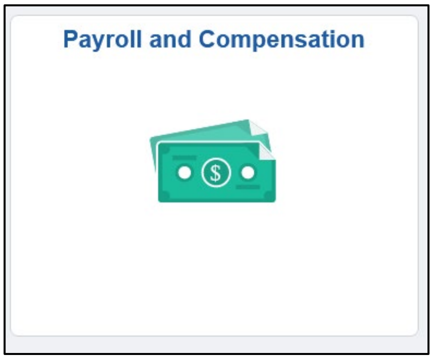


12. Click **Change Password.**

Part III: Viewing Paycheck and Compensation

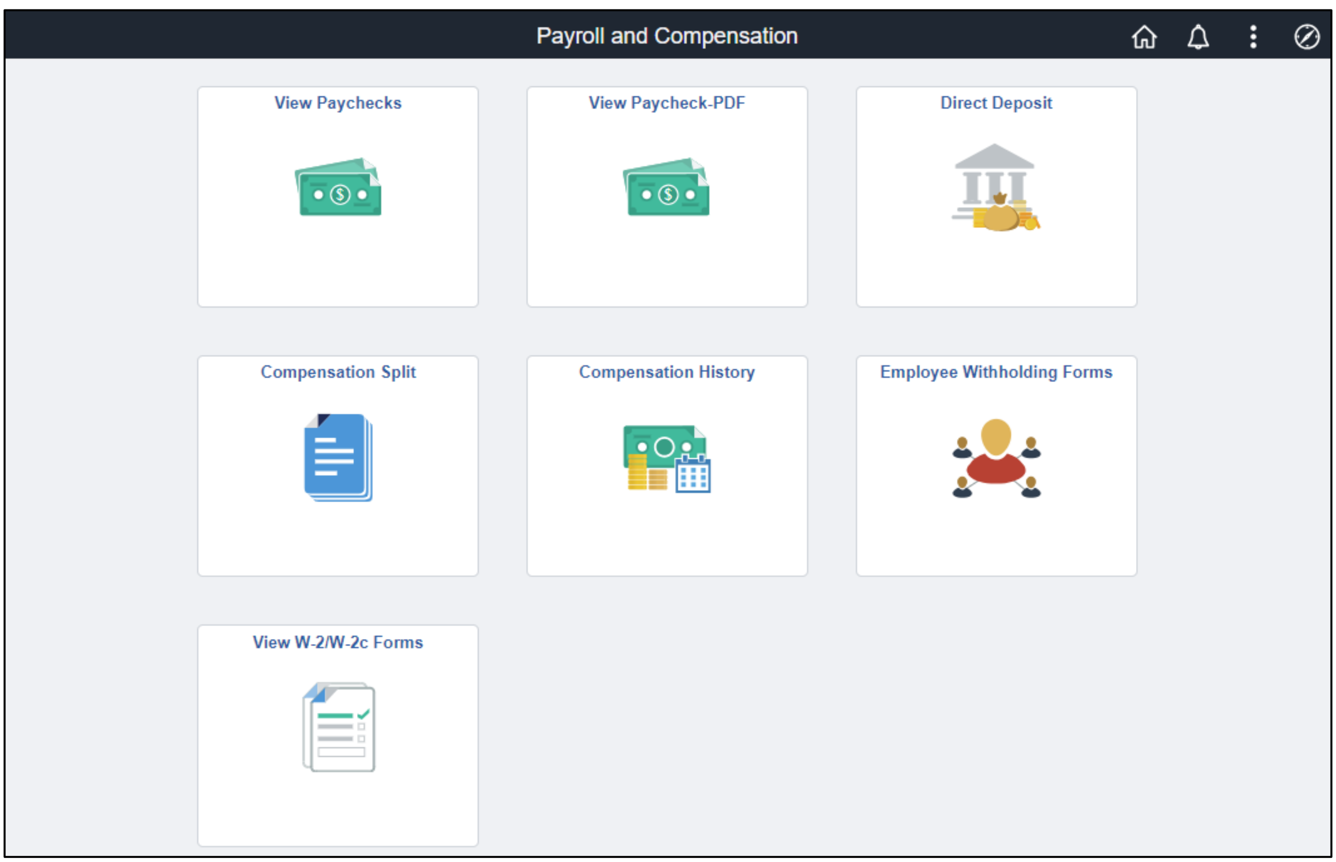
Payroll and Compensation

1. **Click on Payroll and Compensation** to review:



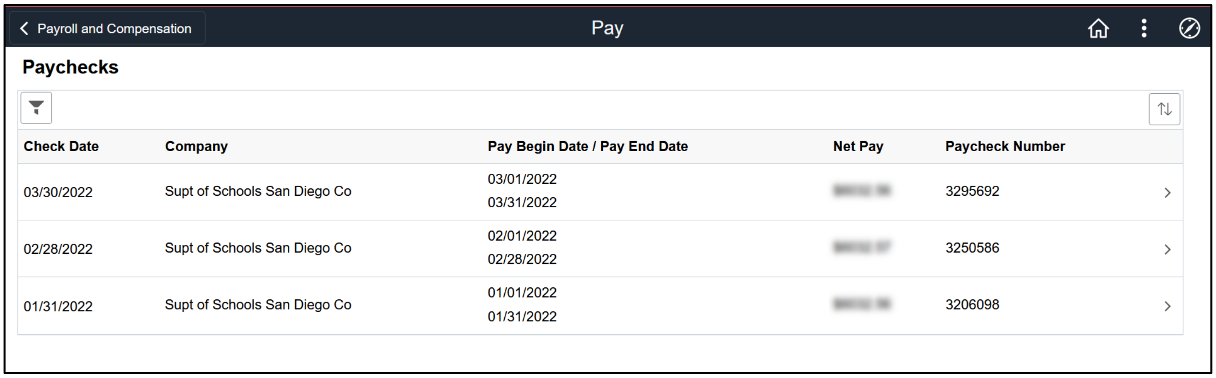
2. You will see tiles that will take you to additional pages, which we will review in separate sections:

   - View Paychecks
   - View Paychecks-PDF
   - Direct Deposit
   - Compensation Split
   - Compensation History
   - Employee Withholding Forms
   - View W-2/W-2c Forms



Viewing Paychecks

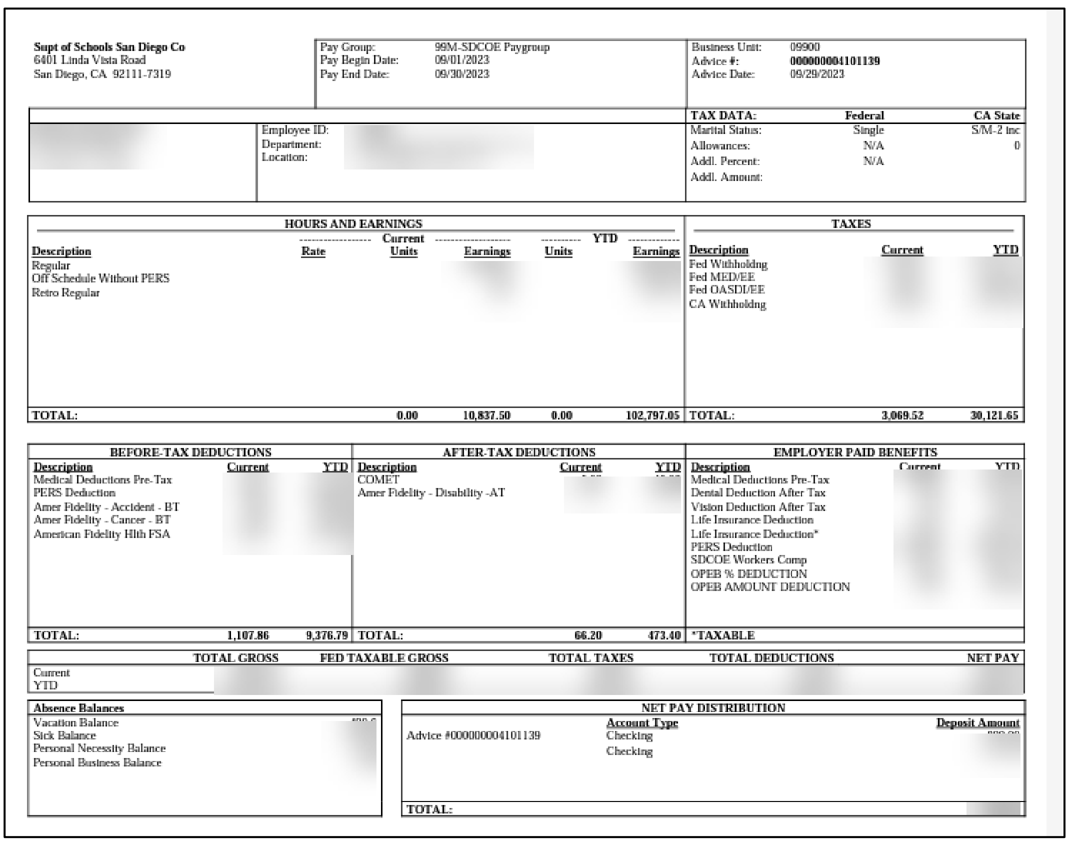
1. **Click on Payroll and Compensation** to review:
2. **Click on View Paycheck** to see most recent Paychecks.



Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number
03/30/2022	Supt of Schools San Diego Co	03/01/2022 03/31/2022	[illegible]	3295692
02/28/2022	Supt of Schools San Diego Co	02/01/2022 02/28/2022	[illegible]	3250586
01/31/2022	Supt of Schools San Diego Co	01/01/2022 01/31/2022	[illegible]	3206098

3. **Click on any component** to see PDF of Paycheck details.

   Note: If Paycheck does not open, check that your pop-up blocker is turned off.



Supt of Schools San Diego Co
6401 Linda Vista Road
San Diego, CA 92111-7319

Pay Group: 99M-SDCOE Paygroup
Pay Begin Date: 09/01/2023
Pay End Date: 09/30/2023

Business Unit: 09900
Advice #: 000000004101139
Advice Date: 09/29/2023

Employee ID:
Department:
Location:

TAX DATA:	Federal	CA State
Marital Status:	Single	S/M-2 Inc
Allowances:	N/A	0
Addl. Percent:	N/A	
Addl. Amount:		

HOURS AND EARNINGS

Description	Rate	Current Units	Current Earnings	YTD Units	YTD Earnings
Regular					
Off Schedule Without PERS					
Retro Regular					
TOTAL:		0.00	10,837.50	0.00	102,797.05

TAXES

Description	Current	YTD
Fed Withholdng		
Fed MED/EE		
Fed OASDI/EE		
CA Withholdng		
TOTAL:	3,069.52	30,121.65

BEFORE-TAX DEDUCTIONS

Description	Current	YTD
Medical Deductions Pre-Tax		
PERS Deduction		
Amer Fidelity - Accident - BT		
Amer Fidelity - Cancer - BT		
American Fidelity Hlth FSA		
TOTAL:	1,107.86	9,376.79

AFTER-TAX DEDUCTIONS

Description	Current	YTD
COMET		
Amer Fidelity - Disability -AT		
TOTAL:	66.20	473.40

EMPLOYER PAID BENEFITS

Description	Current	YTD
Medical Deductions Pre-Tax		
Dental Deduction After Tax		
Vision Deduction After Tax		
Life Insurance Deduction		
Life Insurance Deduction*		
PERS Deduction		
SDCOE Workers Comp		
OPEB % DEDUCTION		
OPEB AMOUNT DEDUCTION		
*TAXABLE		

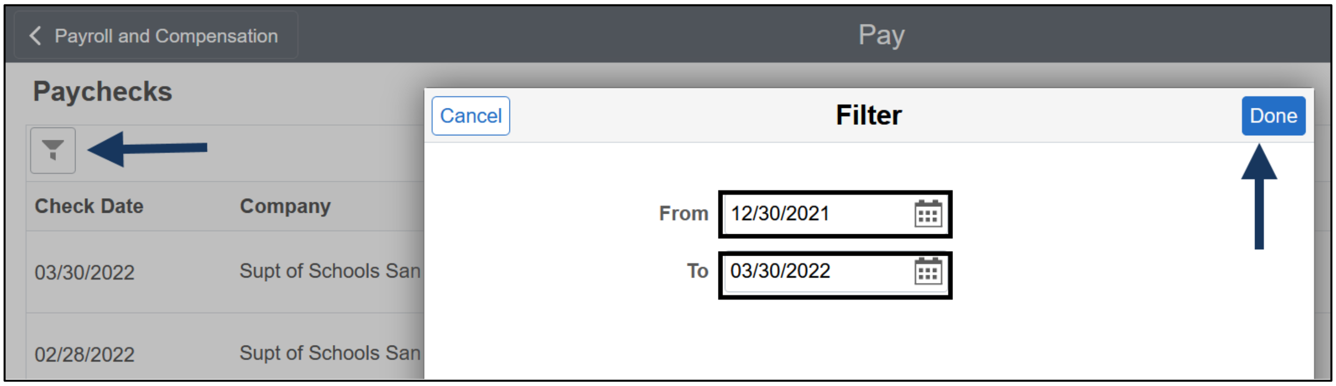
	TOTAL GROSS	FED TAXABLE GROSS	TOTAL TAXES	TOTAL DEDUCTIONS	NET PAY
Current					
YTD					

Absence Balances
Vacation Balance
Sick Balance
Personal Necessity Balance
Personal Business Balance

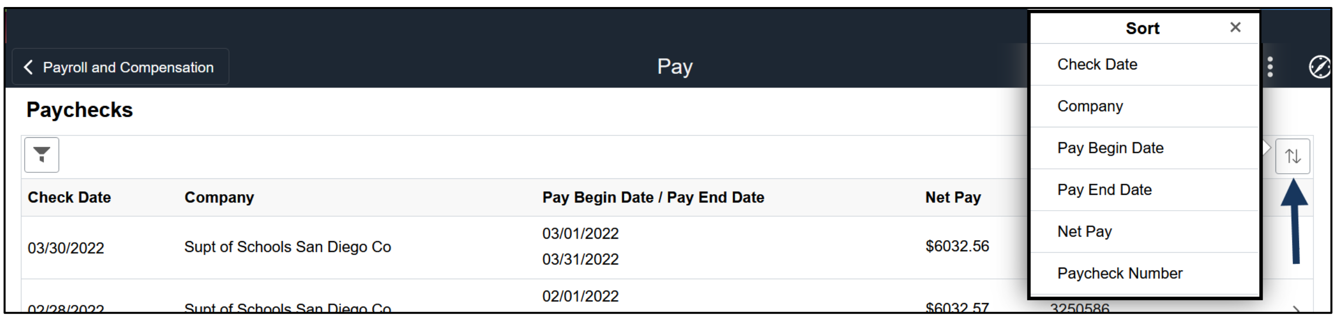
NET PAY DISTRIBUTION

	Account Type	Deposit Amount
Advice #000000004101139	Checking	
	Checking	
TOTAL:		

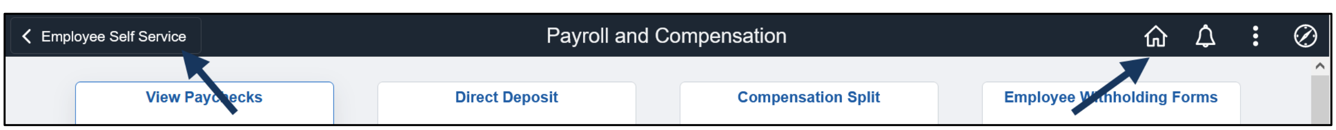
4. **Close paycheck window** to return to Paychecks screen.
5. To see **Paychecks for a specific date range, use the filter icon** on the upper left corner of the screen. **Select date range** and **click Done.**



6. Click on the up and down arrows on the right side of screen to sort Paychecks.



7. Refer to **How to Read Your PeopleSoft Paycheck** (p.16) for additional details.
8. To return to homepage, click on Payroll Compensation > Employee Self-Service in upper left or Home icon in the upper right.

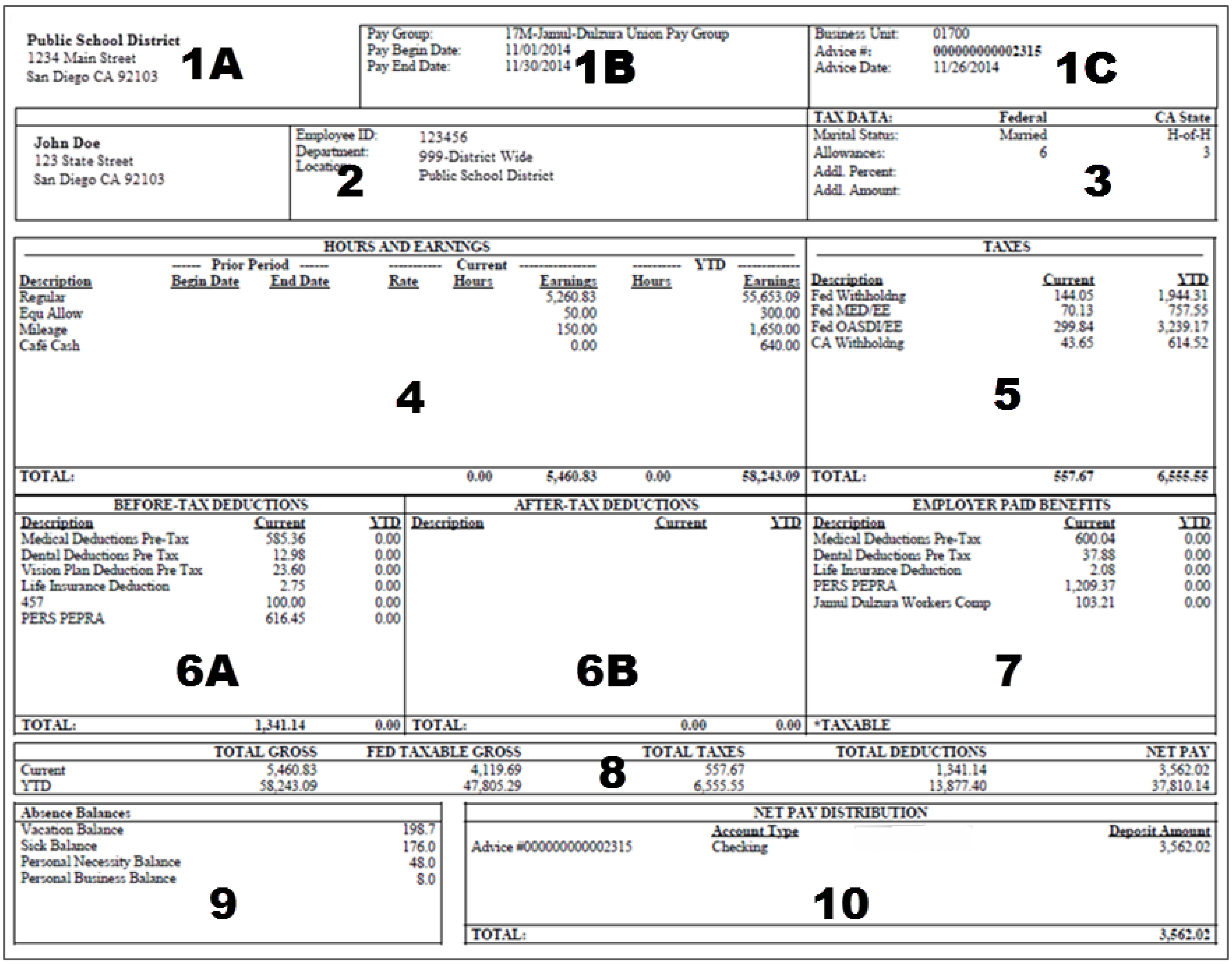


How to Read Your PeopleSoft Paycheck

Version 1.0 | January 27, 2015

Sample Paycheck

Here is a sample PeopleSoft paycheck stub. Descriptions of each area begin on the next page.



Public School District
1234 Main Street
San Diego CA 92103
1A

Pay Group:	17M-Jamul-Dulzura Union Pay Group
Pay Begin Date:	11/01/2014
Pay End Date:	11/30/2014

1B

Business Unit:	01700
Advice #:	000000000002315
Advice Date:	11/26/2014

1C

John Doe
123 State Street
San Diego CA 92103

Employee ID:	123456
Department:	999-District Wide
Location:	Public School District

2

TAX DATA:	Federal	CA State
Marital Status:	Married	H-of-H
Allowances:	6	3
Addl. Percent:		
Addl. Amount:		

3

HOURS AND EARNINGS

Description	Prior Period Begin Date	Prior Period End Date	Current Rate	Current Hours	Current Earnings	YTD Hours	YTD Earnings
Regular					5,260.83		55,653.09
Equ Allow					50.00		300.00
Mileage					150.00		1,650.00
Café Cash					0.00		640.00
TOTAL:				0.00	5,460.83	0.00	58,243.09

4

TAXES

Description	Current	YTD
Fed Withholdng	144.05	1,944.31
Fed MED/EE	70.13	757.55
Fed OASDI/EE	299.84	3,239.17
CA Withholdng	43.65	614.52
TOTAL:	557.67	6,555.55

5

BEFORE-TAX DEDUCTIONS

Description	Current	YTD
Medical Deductions Pre-Tax	585.36	0.00
Dental Deductions Pre Tax	12.98	0.00
Vision Plan Deduction Pre Tax	23.60	0.00
Life Insurance Deduction	2.75	0.00
457	100.00	0.00
PERS PEPRA	616.45	0.00
TOTAL:	1,341.14	0.00

6A

AFTER-TAX DEDUCTIONS

Description	Current	YTD
TOTAL:	0.00	0.00

6B

EMPLOYER PAID BENEFITS

Description	Current	YTD
Medical Deductions Pre-Tax	600.04	0.00
Dental Deductions Pre Tax	37.88	0.00
Life Insurance Deduction	2.08	0.00
PERS PEPRA	1,209.37	0.00
Jamul Dulzura Workers Comp	103.21	0.00
*TAXABLE		

7

	TOTAL GROSS	FED TAXABLE GROSS	TOTAL TAXES	TOTAL DEDUCTIONS	NET PAY
Current	5,460.83	4,119.69	557.67	1,341.14	3,562.02
YTD	58,243.09	47,805.29	6,555.55	13,877.40	37,810.14

8

Absence Balances	
Vacation Balance	198.7
Sick Balance	176.0
Personal Necessity Balance	48.0
Personal Business Balance	8.0

9

NET PAY DISTRIBUTION

	Account Type	Deposit Amount
Advice #000000000002315	Checking	3,562.02
TOTAL:		3,562.02

10

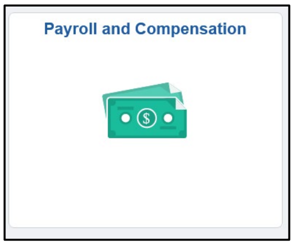
Area	Description	Fields
1	**Payroll Information** *Consists of payroll information.*	▪ Employer name and business address ▪ **Pay Group:** M (Salaried Employee), P (Hourly Employee) R (Retired Employee) ▪ **Pay Begin Date and Pay End Date**: The current monthly payroll cycle ▪ **Business Unit**: The school district's identifier within San Diego County ▪ **Advice Number:** The number assigned to the employee's pay advice, similar to a check number ▪ **Advice Date: The** date the funds are available
2	**Employee Information** *Displays employee information.*	▪ **Employee Name**: The name of the employee ▪ **Employee Address:** The address of the employee ▪ **Employee ID**: The employee's issued employee identification number ▪ **Department:** The employee's primary department ▪ **Location:** The employee's primary location
3	**Tax Data** *Shows what the employee has designated for federal and state taxes, which determines how much Federal and California state taxes are withheld from a paycheck.*	▪ **Marital Status:** Marital status of the employee for tax withholding purposes ▪ **Allowances**: Withholding allowances selected for Federal and State ▪ **Addl Percent and Addl Amount:** Additional withholdings
4	**Hours and Earnings** *Reports the employee's regular monthly salary and/or how many hours worked in the pay period, including overtime, holiday hours, and vacation hours.*	▪ **Regular monthly base salary:** Includes base pay and any extra pay for bilingual stipends, master and doctoral stipends, longevity, credential stipends, etc. ▪ **Additional Pays:** Allowances such as auto allowance, insurance buy-out, equipment allowance or uniform allowance, etc., are individually identified and listed separately ▪ -**See Compensation Split (p.19) for examples** ▪ -**See Earnings Code Descriptions (p. 22) for explanation of abbreviations.**
5	**Taxes** *Shows how much is being withheld for taxes.*	▪ **Fed Withholding:** Federal income tax withheld ▪ **Fed MED/EE:** Employee portion of Medicare ▪ **Fed OASDI/EE**: Employee's portion of Social Security
6	**Before and After-Tax Deductions** *Shows the before and after-tax deductions.*	▪ **Before Tax Deductions**: Items listed in this box are taken from the employee's gross wages before taxes, these deductions reduce the Federal taxable wages and therefore the employee's tax withholding ▪ **After Tax Deductions:** Items listed in this box are deducted from the employee's gross wages and have no effect on the taxable wages
7	**Employer Paid Benefits** *Shows employer paid benefits.*	▪ If any amounts are included as taxable income, they will be indicated with an asterisk.

Area	Description	Fields
8	**Paycheck Summary** *Displays a breakdown of current and year-to-date earnings, taxes, deductions, and net pay.*	▪ The **Current row** refers to gross pay less current deductions. The YTD row refers to the total gross received for the calendar year and includes the current amount. ▪ **Total Gross:** The gross pay received ▪ **Fed Taxable Gross:** Gross pay minus any pre-pay deductions ▪ **Total Taxes:** The total of Federal and State withholdings ▪ **Total Deductions**: The total of the before tax and after-tax deductions ▪ **Net Pay:** The gross pay less deductions and tax withholdings paid to the employee
9	**Absences Balances** *Shows your absence balances for vacation, sick, personal necessity, and personal business.*	▪ **Balances** are displayed in hours.
10	**Net Pay Distribution** *Shows net earnings for the pay period.*	▪ If you have more than one account set up for direct deposit, each account and the amount of deposit will be shown

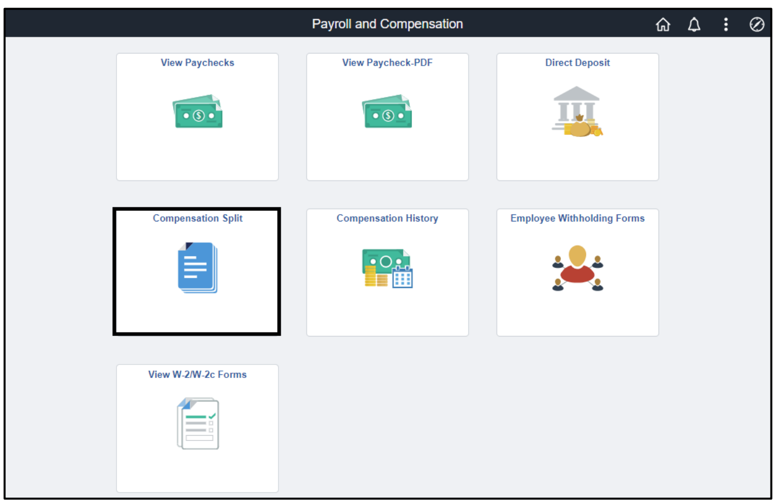
Compensation Split

After a paycheck is available, use the Compensation Split page to view your earnings in greater detail. Multiple Components of Pay (MCOPs), additional pays, stipends, payroll earnings, and items which add to the total gross are listed as line items with corresponding values.

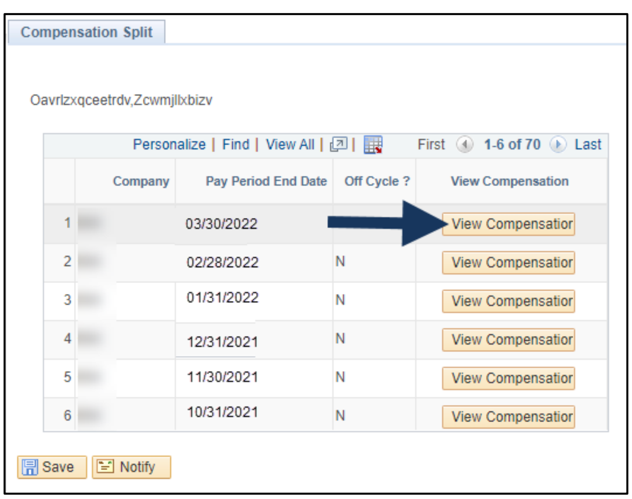
1. In Employee Self Service, click the Payroll and Compensation tile



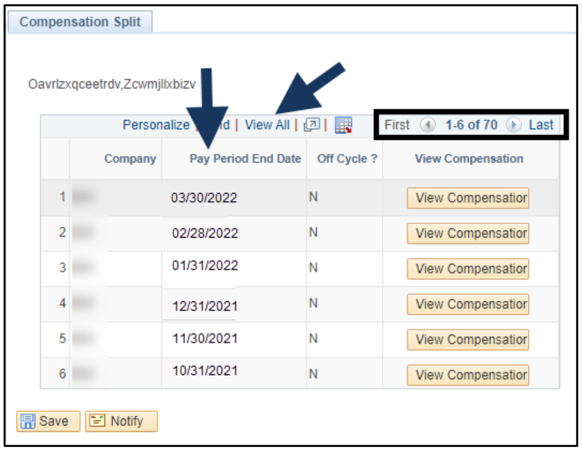
2. Click on Compensation Split tile.



3. Click **View Compensation** for the Pay Period you want to review.



4. Click **Pay Period End Date** to sort in reverse order or click View All to see all checks.



	Company	Pay Period End Date	Off Cycle ?	View Compensation
1		03/30/2022	N	View Compensation
2		02/28/2022	N	View Compensation
3		01/31/2022	N	View Compensation
4		12/31/2021	N	View Compensation
5		11/30/2021	N	View Compensation
6		10/31/2021	N	View Compensation

Save Notify

5. **Multiple compensation information** screen displays your earnings in greater details.

Example 1: LONG% (Longevity)

Line 1 (LONG%) + Line 2 (Month) = Line 3 (Gross)

Personalize | Find | View All | First 1-3 of 3 Last

	Comp Rate Code	Comp Rate
1	LONG%	216.915459
2	Month	6197.584541
3	Gross	6414.500000

Example 2: CFC (Cafe-Plan Cash)

Line 1 (CFC) + Line 2 (Month) = Line 3 (Gross)

Personalize | Find | View All | First 1-3 of 3 Last

	Comp Rate Code	Comp Rate
1	CFC	120.000000
2	Month	7368.970000
3	Gross	7488.970000

Example 3: BILS$ (Bilingual Stipend) & HRL (Payroll Hourly Earnings Code)

Line 1 (BILS$) + Line 2 (HRL) + Line 3 (Month) = Line 4 (Gross)

Personalize | Find | View 3 | First 1-4 of 4 Last

	Comp Rate Code	Comp Rate
1	BILS$	41.669980
2	HRL	429.000000
3	Month	7043.580020
4	Gross	7514.250000

Example 4: No multiple compensation information

Line 1 (Month) = Line 2 (Gross)

	Comp Rate Code	Comp Rate
1	Month	4152.920000
2	Gross	4152.920000

Notes: A paycheck must be present to view data pertaining to the processed pay period.

Earnings Code Descriptions

Version 3.0 | March 4, 2021

This list shows the descriptions for earnings codes that may appear on employees' paychecks. NOTE: Not all organizations use all of these codes. Please contact your organization's Payroll Department for more information.

1. ATO – Auto Allowance
2. BIL – Bilingual Stipend
3. BIN – Bil Stipend-No Credible STRS
4. BND – Band
5. BNI - Benefit Incentive
6. BNR - BTSA-Without Release
7. BPA - Back Pay Award
8. BUS - School Bus Driver
9. BWR - BTSA-With Release
10. C15 – COMP TIME 1.5
11. CBS - Certificated Bonus-DBS
12. CF2 - Café-Plan Cash 2
13. CF3 - Discretionary Funds
14. CF4 - District Paid Benefit
15. CFC - Café-Plan Cash
16. CMP - Comp Time
17. CNC - Confidential Classified
18. COT - Coaching Overtime
19. CP2 – COMP TIME 2.0
20. CPO - Comp Pay Off
21. CPW – Water Certification Premium
22. CST - Credential Stipend
23. CV2 – FFCRA COVID Rptbl $200 Cap
24. CV5 – FFCRA COVID Rptbl $511 Cap
25. DBW - STRS Defined Benefit Wages
26. DLY - Daily
27. DPB - District Paid Benefits
28. DRT - Driver Training
29. DST - Doctorial Stipend
30. DTS – Difficult to Staff - Cert
31. EAP - Educational Assistance Plan
32. EAW - Employee Award
33. ECP – Ed Code Payout
34. EDS - Extended Day STRS
35. EFL – Emergency Family Leave
36. EIP - Educational Incentive-PERS
37. ENR – Earnings No Retirement
38. EQA - Equipment Allowance
39. EXA - Expense Allowance
40. FRX - Friday Rate
41. FXC - Flex Credit Earnings
42. GLM - Massage License
43. GLN - Nursing License
44. H1 - Holiday/1.0
45. H15 – Holiday/1.5
46. H2 - Holiday/Double
47. H25 - Holiday/2.5
48. HNR - Dept Head Without Release
49. HPP - Holiday Pay-PERS
50. HRE - Exception Hourly
51. HRL - Hourly
52. HSA - Housing Allowance
53. HWR - Dept Head With Release
54. HZP - Hazard Premium
55. IBO - Insurance Buy Out
56. INS - Inservice Workshop
57. JDA - Jury Duty Allowance
58. JDO - Jury Duty Offset
59. L10 - Exception Houly Longevity 10%
60. L12 - Exception Hrly Longevity 12.5%
61. L25 - Exception Hrly Longevity 2.5%
62. L50 - Exception Hrly Longevity 5.0%
63. L75 - Exception Hrly Longevity 7.50%
64. LEE – Ldrshp Effctv Ed Prg (LEEP)
65. LIC - LRT/Internet Class
66. LNG - Longevity
67. LTR - Lead Teacher
68. LWH - Leave without Pay Hourly
69. LWP - Leave Without Pay
70. MEC - Mechanical Premium
71. MIL - Mileage Allowance
72. MPP - Military Pay PERS
73. MSS - Master Stipend
74. MTE – Master Teacher Stipend
75. MTS - Math Stipend
76. O25 - Overtime 2.5
77. OC5 - Exception Hrly Out of Class 5%
78. ODS - OTH Degree Stipend
79. OFN - Off Schedule Without PERS
80. OLC - Overload-C.C.
81. ONS - Overnight Stipend
82. OOC - Out of Class
83. OSP - Off Schedule Pay PERS
84. OSS - Off Schedule Pay STRS-DBS
85. OT1 - Overtime/Straight
86. OT2 - Overtime/Double
87. OT5 - Overtime/One and Half
88. PEW - PERS EPMC Subject Wages
89. PNR - PAR-Without Release
90. PPD - Performance Pay-DBS
91. PPS - Performance Pay-STRS
92. PPW - PERS-PEPRA Subject Wages
93. PSW - PERS Subject Wages
94. PUA - PERS Only Uniform Allowance
95. PWR - PAR-With Release
96. RAP – Retro Applicator's Differential
97. RBD – Retro Band
98. RBI – Retro Bilingual Stipend
99. RBN – Retro BTSA-Without Release
100. RBU – Retro School Bus Driver
101. RBW – Retro BTSA-With Release
102. RCN – Retro Confidential Classified
103. RCO – Retro Coaching Overtime
104. RCP – Retro Water Certification Prem
105. RCS – Retro Credential Stipend
106. RDL – Retro Daily

107. RDN – Retro 01/01/1901
108. RDR – Retro Doctorial Stipend
109. RDS – Reading Stipend
110. RDT – Retro Driving Stipend
111. RDW – Retro Dept Head With Release
112. REG – Regular
113. REI – Retro Education Incentive-PER
114. REO – Retro Exception Hrly Out of Cl
115. REX – Retro Extended Day STRS
116. RFR – Retro Friday Rate
117. RH1 – Retro Holiday/1.0
118. RH2 – Retro Holiday/2.5
119. RH5 – Retro Holiday/1.5
120. RHD – Retro Holiday/Double
121. RHE – Retro Exception Hourly
122. RHN – Retro Dept Head Without Release
123. RHP – Retro Holiday Pay-PERS
124. RHR – Retro Hourly
125. RHZ – Retro Hazard Premium
126. RIC – Retro LRT/Internet Class
127. RIN – Retro Inservice Workshop
128. RLC – Retro Overload-C.C.
129. RLN – Retro Longevity
130. RLT – Retro Lead Teacher
131. RML – Retro Massage License
132. RMP – Retro Mechanical Premium
133. RMS – Retro Master Stipend
134. RMT – Retro Math Stipend
135. RNC - Retirement Incentive
136. RNL – Retro Nursing License
137. RNS – Retro Not Subject to Retirement
138. RO2 – Retro Overtime 2.5
139. ROD – Retro OTH Degree Stipend
140. RON – Retro Overnight Stipend
141. ROO – Retro Out of Class
142. RPN – Retro PAR-Without Release
143. RPW - PERS Retiree Subject Wages
144. RRD – Retro Reading Stipend
145. RRG Retro Regular
146. RRP - Retro Pay
147. RSD – Retro Shift Differential Lump
148. RSP – Retro Severely Disables Prem
149. RST – Retro Site Pay
150. RSW - STRS Retiree Subject Wage
151. RT1 – Retro Overtime/Straight
152. RT2 – Retro Overtime/Double
153. RT5 – Retro Overtime/One and Half
154. RTB - Retiree with ER Benefits
155. RTM – Retro Master Teacher Stipend
156. RTP – Retro Temporary Upgrade
157. RTS – Retro Teacher Staff Development
158. RTT – Retro Teacher TR-#STDNT
159. RTU – Retro Teacher TR-Uniform
160. RUA – Retro Uniform AL-PERS
161. RUN – Retro Unit Stipend $
162. RXC – Retro Xtra Curr Activity-Class
163. RXR – Retro Xtra Curr Activity-Cert
164. SAP – St Match CSE Summer Asst Prog
165. SCP – School Closure Premium
166. SCW - STRS Cash Balance Sub Wages
167. SDL - Shift Differential Lump Sum
168. SDP – Severely Disabled Premium
169. SKD - Sick Differential
170. SLA - Negative Sick Leave Adjustment
171. SLH - Neg Sick Adjustment - Hourly
172. SLP - SICKLVINC PERS
173. SLS - SICKLVINC STRS
174. SPC - Special Programs-Certificated
175. SPO - Sick Leave Pay Off
176. SPW - STRS-PEPRA Subject Wages
177. SRP - Salary Repayment
178. SRW - STRS Red Workload Subject Wage
179. SSW - STRS Subject Wages
180. STP - Site Pay
181. TBN - Term'd w Benefits-Dedn Offset
182. TIM – Time Administration Only
183. TMP - Termination Pay
184. TSD - Teacher Staff Development
185. TTS - Teacher TR-#STDNT
186. TTU - Teacher TR-Uniform
187. TUP – Temporary Upgrade Pay
188. TWP - Term With Pay
189. UAP - Uniform AL-PERS
190. UAS - Uniform AL-STRS
191. UNT - Unit Stipend $
192. VPO - Vacation Pay Off
193. VPS - Vacation Pay Off, Suppl Tax
194. XAC - Xtra Curr Activity-Classified
195. XAR - Xtra Curr Activity-Cert
196. YRE - Y-Rated Earnings
197. ZER - Zero Earnings for AM

ESS Withholding Forms: Federal and State

Version 1.1 | July 15, 2022

This job aid provides instructions for adding and updating Employee Federal (Form W4) and State (Form DE 4) Withholdings on the Employee Self-Service (ESS) page, https://ess.erp.sdcoe.net. The ESS pages for Federal and State are replicates of the forms themselves. You will be able to view the actual W4 and DE 4 forms on each page.

ESS Withholding Forms: Federal

Disclaimer about the Federal Tax Withholding Form:

DISCLAIMER: Please note that, when you update your W-4 information and save your changes, the changes you make will supersede any settings you previously had in place. Settings you had in place previously will NOT be carried over into changes you make on this form, so it is critical that you complete the form by including ALL deductions and necessary changes.

Please also note that the changes you make will take effect on the day that you make them. Because of this, please be aware of the dates on which payroll runs. If you need for changes to take effect as of a certain payroll, please contact your Payroll Department to find out the W-4 deadline for the current month.

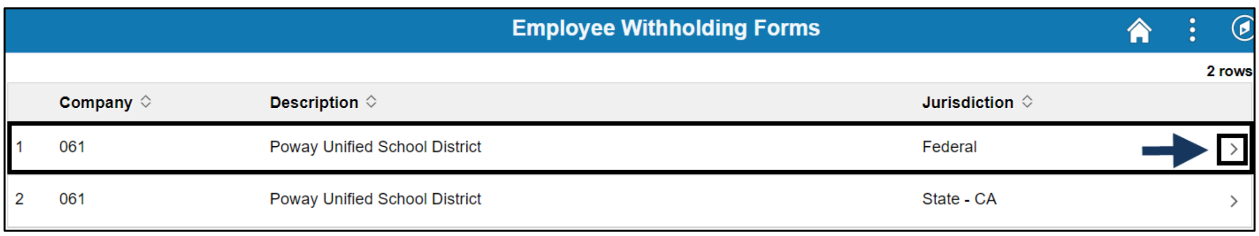
I agree to hold harmless and indemnify the School District(s), Charter School(s) and SDCOE and their officers, employees and agents from any claim or demand of whatever nature, including those based upon negligence of the District, School or SDCOE and their officers, employees and agents for failure or delay in making changes requested on the W-4.

This authorization replaces any previous agreements made by me and will remain in effect until changed or cancelled by submission of a new W-4 form to the District, School or SDCOE office in which I am currently employed. All District, School and SDCOE assignments, both current and future will automatically be linked to the most recent W-4 form received by my current employer(s).

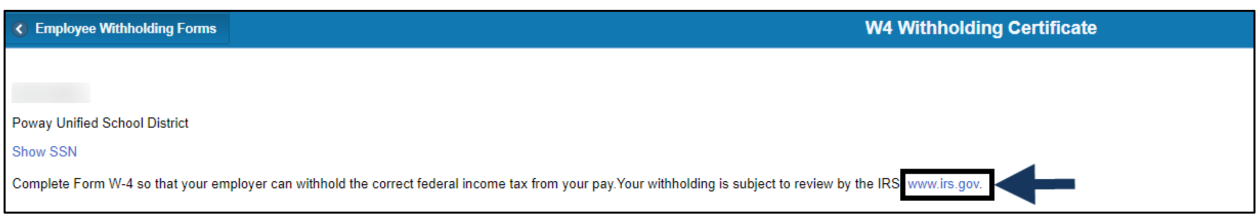
1. To access Withholding Forms, in **Employee Self Service**, click the **Payroll and Compensation** tile

2. Click on Employee Withholding Forms

3. Click **>** to edit your **Federal** withholding.

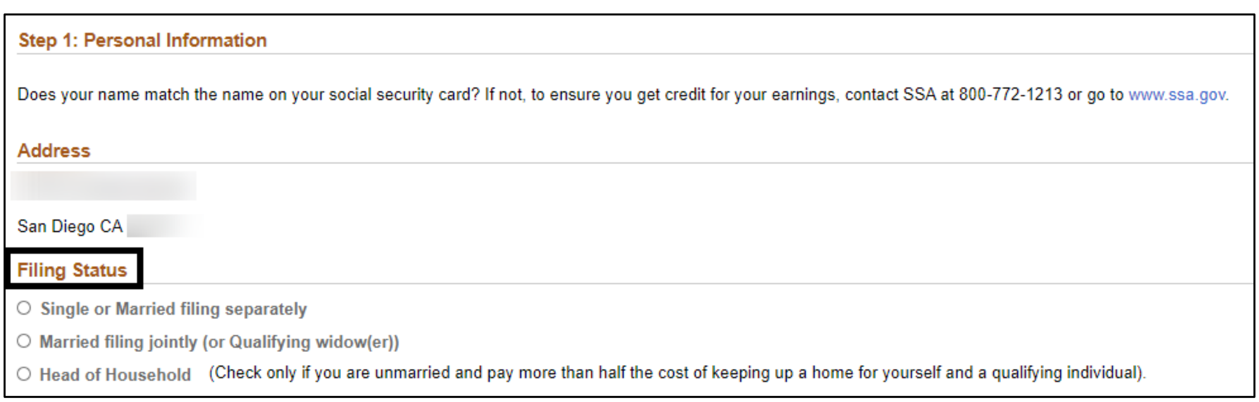


4. Click the www.irs.gov link to view the W4 Form. This opens in a new tab. You may want to leave it open for reference as you complete the W-4 form in ESS.



Step 1: Personal Information:

- **Address** – If address needs updating, refer to the Personal Information section of ESS
- **Filing status**.



Only Complete Steps 2 – 4 if they apply to you.

Exemption Form is after Step 4: To see if you are exempt from withholding or you have concerns about your privacy, see instructions for Form W-4 on the IRS website.

Step 2: Multiple Jobs or Spouse Works: **Read this section carefully**. Click **View Instructions** to determine if you qualify.

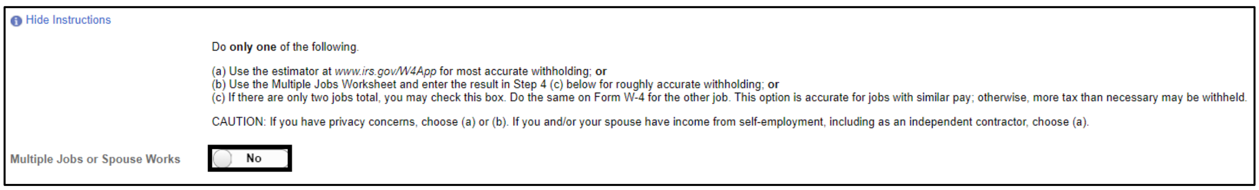

Step 2: Multiple Jobs or Spouse Works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all these jobs.

View Instructions

Multiple Jobs or Spouse Works No

Step 2 con't: Read the instructions carefully. **Multiple Jobs or Spouse Works:** Click the box if you meet the criteria.

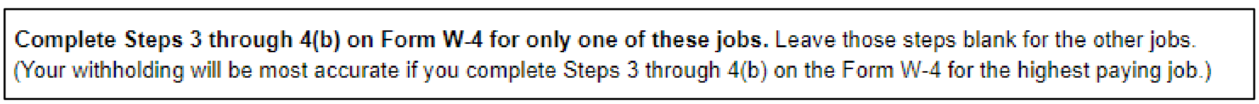

Hide Instructions

Do **only one** of the following.

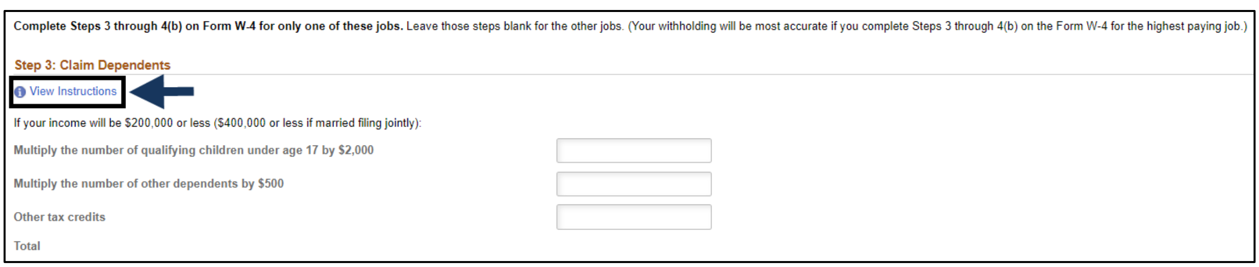
(a) Use the estimator at *www.irs.gov/W4App* for most accurate withholding; **or**
(b) Use the Multiple Jobs Worksheet and enter the result in Step 4 (c) below for roughly accurate withholding; **or**
(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld.

CAUTION: If you have privacy concerns, choose (a) or (b). If you and/or your spouse have income from self-employment, including as an independent contractor, choose (a).

Multiple Jobs or Spouse Works No


Complete Steps 3 through 4(b) on Form W-4 for only one of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3 through 4(b) on the Form W-4 for the highest paying job.)

Step 3: Claim Dependents: **Read this section carefully**. Click **View Instructions** for further details.


Complete Steps 3 through 4(b) on Form W-4 for only one of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3 through 4(b) on the Form W-4 for the highest paying job.)

Step 3: Claim Dependents

View Instructions

If your income will be $200,000 or less ($400,000 or less if married filing jointly):

Multiply the number of qualifying children under age 17 by $2,000

Multiply the number of other dependents by $500

Other tax credits

Total

Step 4: Other Adjustments: Click **View Instructions** for further details.


Step 4: Other Adjustments

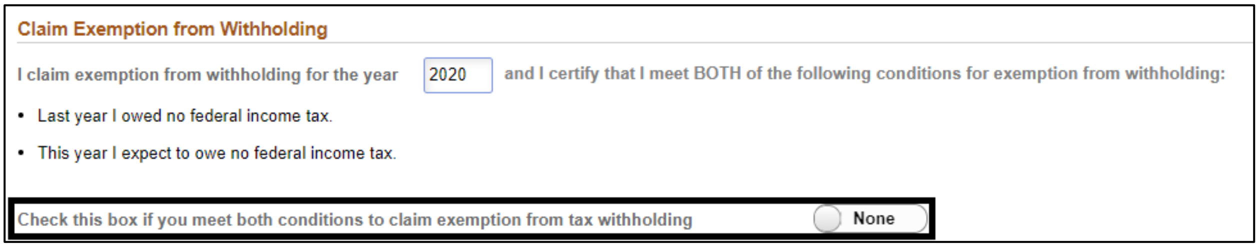
View Instructions

(a) Other Income

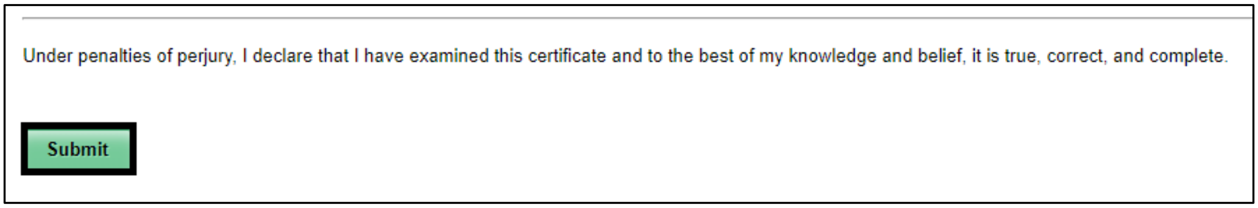
(b) Deductions

(c) Extra Withholding

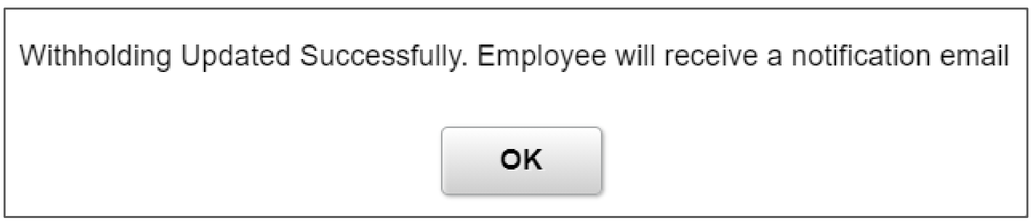
Claim Exemption from Withholding: Read carefully and check if you meet both conditions.



Read carefully and Click Submit when finished.



Email notification will be sent to alert you that a change was made to your information. If you did not make the change, please contact your payroll administration team at your district.



ESS Withholding Forms: State (DE 4)

Disclaimer about the State Tax Withholding Form:

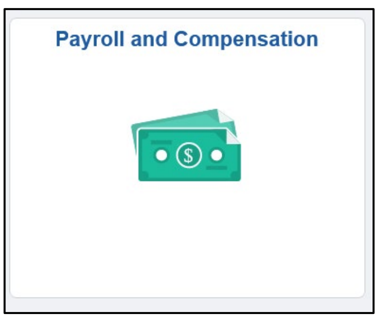
DISCLAIMER: Please note that, when you update your DE 4 information and save your changes, the changes you make will supersede any settings you previously had in place. Settings you had in place previously will NOT be carried over into changes you make on this form, so it is critical that you complete the form by including ALL deductions and necessary changes.

Please also note that the changes you make will take effect on the day that you make them. Because of this, please be aware of the dates on which payroll runs. If you need for changes to take effect as of a certain payroll, please contact your Payroll Department to find out the DE 4 deadline for the current month.

I agree to hold harmless and indemnify the School District(s), Charter School(s) and SDCOE and their officers, employees and agents from any claim or demand of whatever nature, including those based upon negligence of the District, School or SDCOE and their officers, employees and agents for failure or delay in making changes requested on the DE 4.

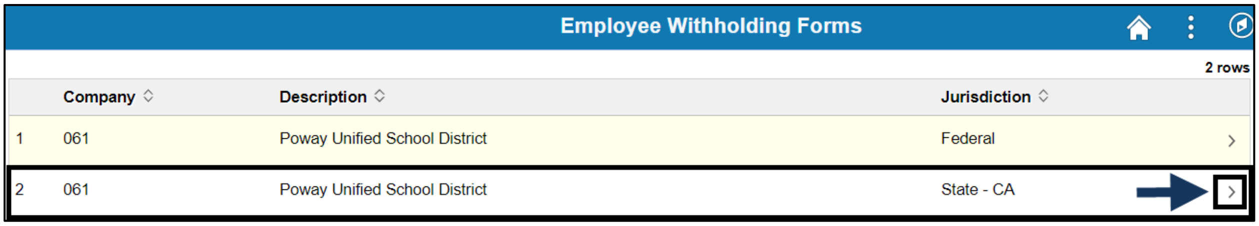
This authorization replaces any previous agreements made by me and will remain in effect until changed or cancelled by submission of a new DE 4 form to the District, School or SDCOE office in which I am currently employed. All District, School and SDCOE assignments, both current and future will automatically be linked to the most recent DE 4 form received by my current employer(s).

1. To access Withholding Forms, in **Employee Self Service**, click the **Payroll and Compensation** tile



2. Click on **Employee Withholding Forms**

3. Click **>** to edit your State withholding.


Employee Withholding Forms

2 rows

	Company	Description	Jurisdiction	
1	061	Poway Unified School District	Federal	>
2	061	Poway Unified School District	State - CA	>

4. **Personal Information:** Click the **Official State Tax Form** link to view the DE 4 Form.
   - **Address** – If address needs updating, refer to the Personal Information section of ESS


Personal Information:

Poway Unified School District

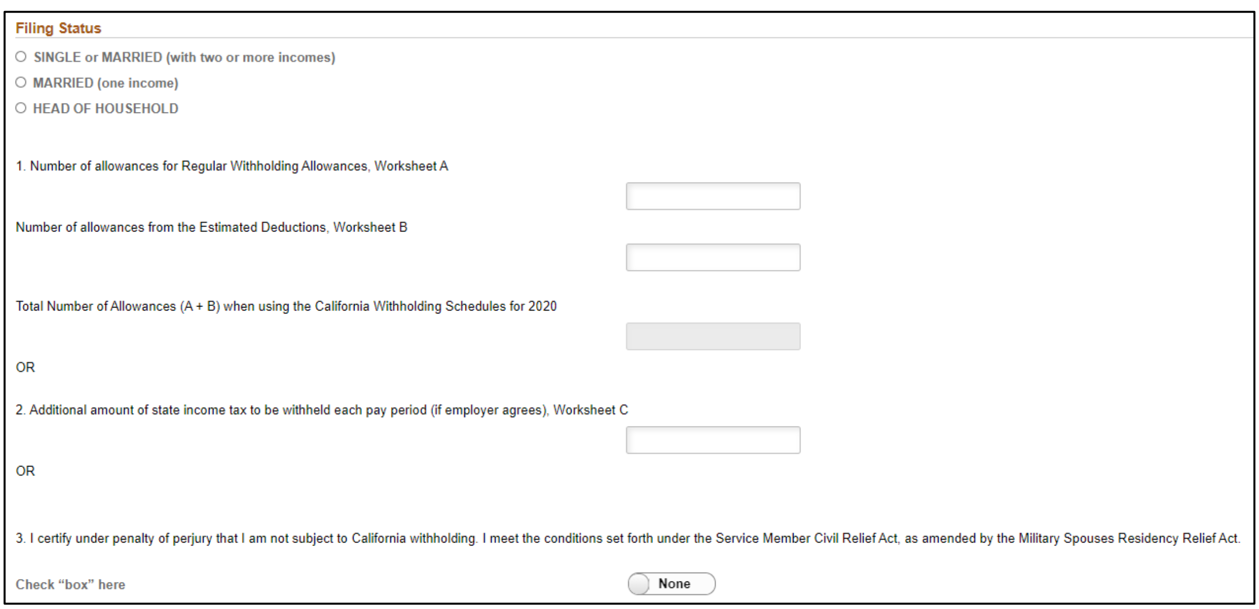
Show SSN

Official State Tax Form

Address

San Diego CA

5. **Filing Status:** Read carefully and fill out the form as desire


Filing Status

- SINGLE or MARRIED (with two or more incomes)
- MARRIED (one income)
- HEAD OF HOUSEHOLD

1. Number of allowances for Regular Withholding Allowances, Worksheet A

Number of allowances from the Estimated Deductions, Worksheet B

Total Number of Allowances (A + B) when using the California Withholding Schedules for 2020

OR

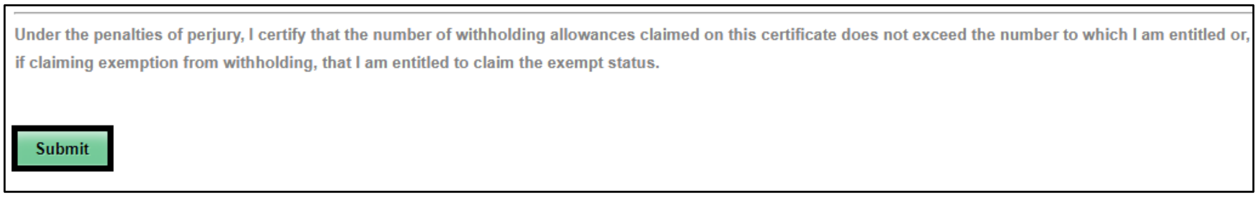
2. Additional amount of state income tax to be withheld each pay period (if employer agrees), Worksheet C

OR

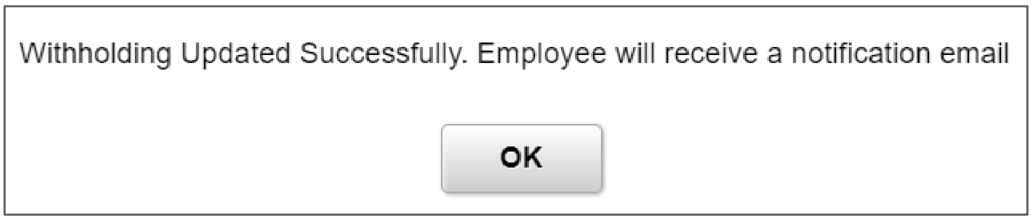
3. I certify under penalty of perjury that I am not subject to California withholding. I meet the conditions set forth under the Service Member Civil Relief Act, as amended by the Military Spouses Residency Relief Act.

Check “box” here None

6. **Read carefully and Click Submit when finished.**



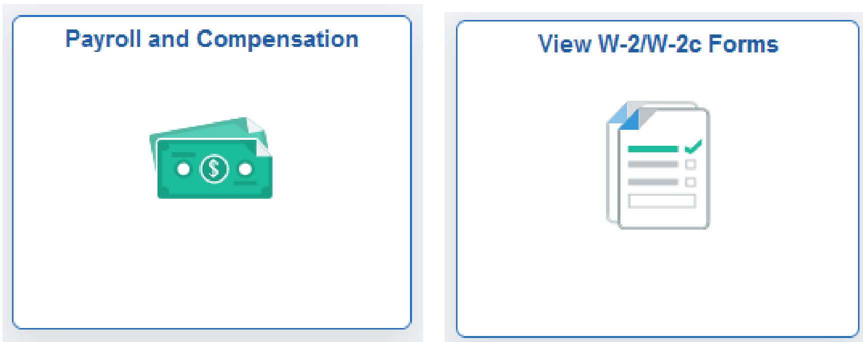
Email notification will be sent to alert you that a change was made to your information. If you did not make the change, please contact your payroll administration team at your district.



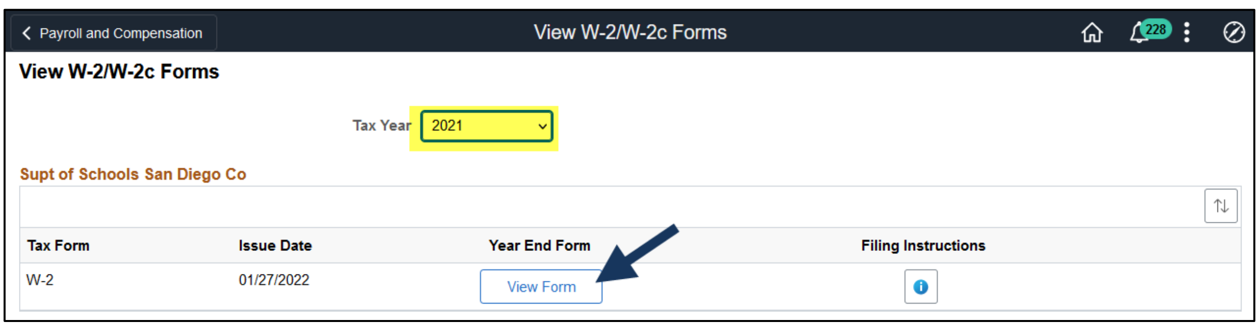
View W-2 Form

This link takes you to the View W-2/W2c Forms

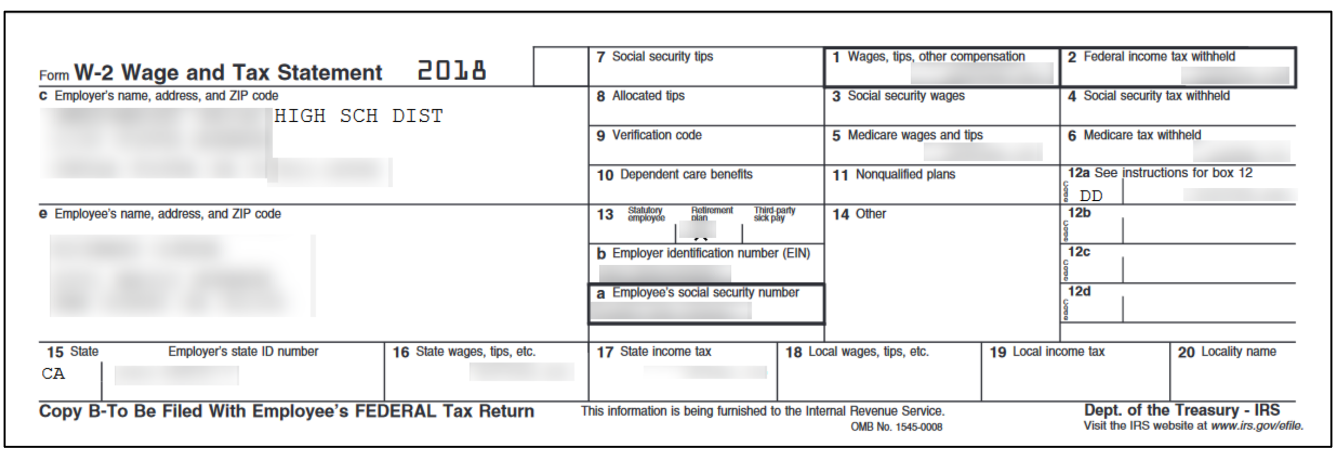
1. In Employee Self Service, click Payroll and Compensation tile, then View W-2/W2c Forms

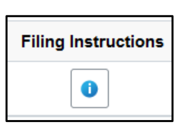


2. Screen displays View W-2/W2c Forms. Select the **Tax Year.**



3. Click on **View Form** to view W-2





4. Click icon for Filing Instructions
5. Click Home icon to return to Home page

ESS Direct Deposit Set up for Employee

Version 1.6 | September 8, 2023

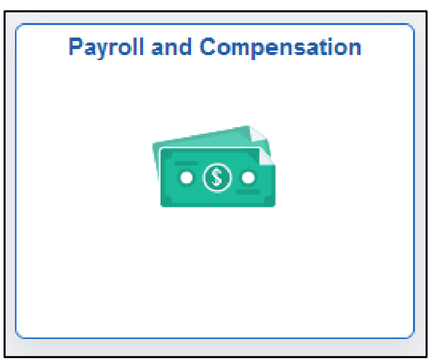
This job aid explains the Employee Self-Service (ESS) Direct Deposit Set up for Employee Payroll. =
*The **ESS Direct Deposit Setup for Employee Portal Video is available** on PeopleSoft Support website > Resources > ESS and General Info Training Materials in ESS section.*
https://sites.google.com/a/sdcoe.net/crc/resources/ess-and-general-info-training-materials

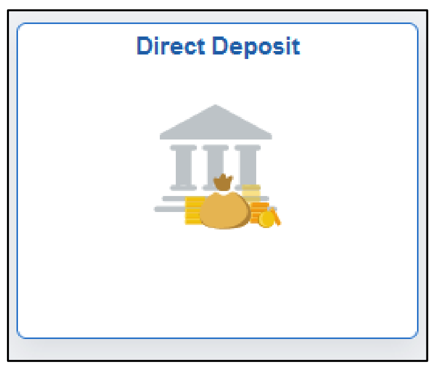
This job aid includes:

- Portal Page
- Disclaimer about Direct Deposit Process
- Deciding How You Want Your Direct Deposit Set up
- Adding Direct Deposit Account
- Editing an Existing Direct Deposit Amount, Percentage, or Remaining Balance
- Removing an Existing Direct Deposit
- IMPORTANT Check Order of Accounts

Portal Page

Employees can now set up their Employee Payroll Direct Deposit from Employee Self-Service (ESS).





The employee's direct deposit information is global and applies to all San Diego County School Districts an employee is employed by.

Multiple banking institutions for deposits may be selected. The distribution of amounts for each banking institution is applied in the same manner for all employers.

When you add a new row to change a direct deposit there is no need to re-enter the additional deposits. All prior row information is carried forward to the new row. If you need to stop one bank account, just delete it from the new row. You do not need to first inactivate the old direct deposit.

Disclaimer about Direct Deposit Process

This disclaimer is on the main Direct Deposit screen. Please READ.

Contact your Payroll Department to find out the Direct Deposit deadline for the current month.

We added additional security to this Direct Deposit screen. **A passcode verification is now required** before you can access your bank information to make changes. The additional security also requires an MFA phone number to receive a verification passcode and a primary email account to receive change notifications. The MFA phone number must be set up 30 days in advance of making a change to your bank information. To set up your MFA phone number, go to the ESS Home screen, and click on Personal Details > Contact Details. To set up your primary email account, go to the NavBar, and click on My Profile.

Disclaimer: I hereby authorize the School District(s), Charter School(s) and the San Diego County Office of Education (SDCOE) and/or their agents, to initiate electronic deposits via the Automated Clearing House (ACH) and, as necessary, to debit corrections to previous deposits, to the account(s) specified below.

- By entering my bank information I am authorizing to deposit my paycheck directly to the bank account(s) specified.
- All new accounts may go through a Pre-note verification during which time a paper warrant shall be issued.
- It is my responsibility to keep apprised of any deposit(s) made to my account(s), including the date(s) and amount(s) of any such deposit(s).
- It is also my responsibility to update My Profile email address in order to receive notifications of changes to my direct deposit bank account(s). I will notify my payroll administrator of any issues.
- I understand that I have only one direct deposit record for all active positions within a San Diego County School District, Charter School, or SDCOE, even if I am employed by more than one of these employers.

I agree to hold harmless and indemnify the School District(s), Charter School(s), and SDCOE and their officers, employees, and agents from any claim or demand of whatever nature, including those based upon negligence of the District, School or SDCOE and their officers, employees and agents for failure or delay in making deposits and/or corrections to deposits as authorized herein.

This authorization replaces any previous agreements made by me and will remain in effect until changed or canceled by submission of a new Direct Deposit Authorization to the District, School or SDCOE office in which I am currently employed. All District, School, and SDCOE assignments, both current and future, will automatically be linked to the most recent Direct Deposit Authorization received by my current employer(s).

User guide for managing direct deposit information: ESS Direct Deposit User Guide

Deciding How You Want Your Direct Deposit Set Up

The table below explains how you will enter information in Employee Self-Service (ESS).

	Most employees	Some employees
What the employee wants	"Put all of my paycheck into Account XYZ."	"Put 10% of my check in Account ABC. Then put $300 in Account DEF. Then put the remaining amount in Account XYZ."
How you enter this in Employee Self-Service (ESS)	Add Account. Row 1: ▪ **Deposit Type** Remaining Balance ▪ **Order (Reorder)** *Remaining Balance* should always be LAST or the highest number when listing multiple accounts	Add multiple accounts. Here is an example: Row 1: 10% ▪ **Deposit Type** = Percent ▪ **Amount or Percent** = 10 ▪ **Order (Reorder)** = 1 Row 2: $300 ▪ **Deposit Type** = Amount ▪ **Amount or Percent** = 300 ▪ **Order (Reorder)** = 2 Row 3: Balance ▪ **Deposit Type** = Remaining Balance ▪ **Order (Reorder)** = *Remaining Balance* should always be LAST or the highest number when listing multiple accounts

Adding Direct Deposit Account

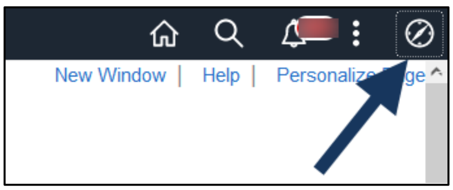
The purpose of this section is to show you how to set up a Direct Deposit Bank Account.

Important:

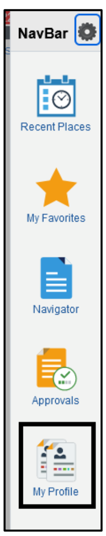
- **For Current Employees:** When there is an add/update to MFA contact phone number, the ESS Direct Deposit set up is locked for 30 days.
- **For New Hires and Rehires:** They will have **10 days** after their hire date to update their MFA contact phone number and not get locked out of ESS direct deposit.

Contact your Payroll Department to find out the Direct Deposit deadline for the current month.

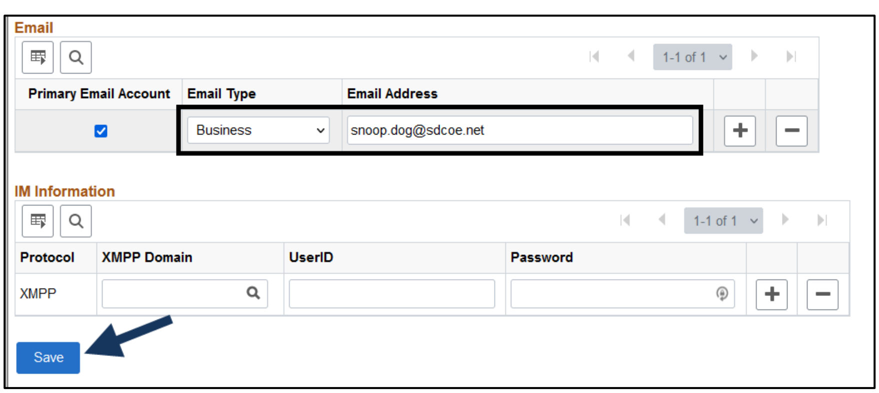
1. Log into [PeopleSoft Employee Self-Service (ESS)](https://ess.erp.sdcoe.net) *https://ess.erp.sdcoe.net*
2. Click on **NavBar icon** in upper right corner.



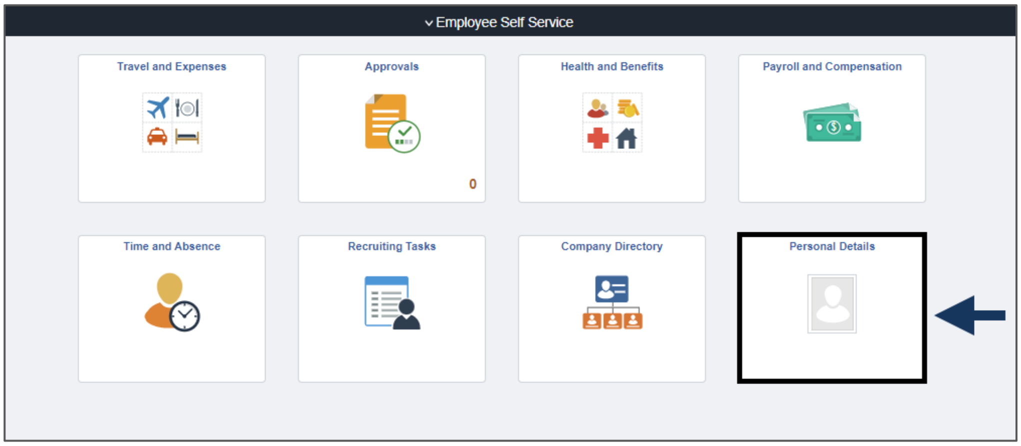
3. Click on My Profile



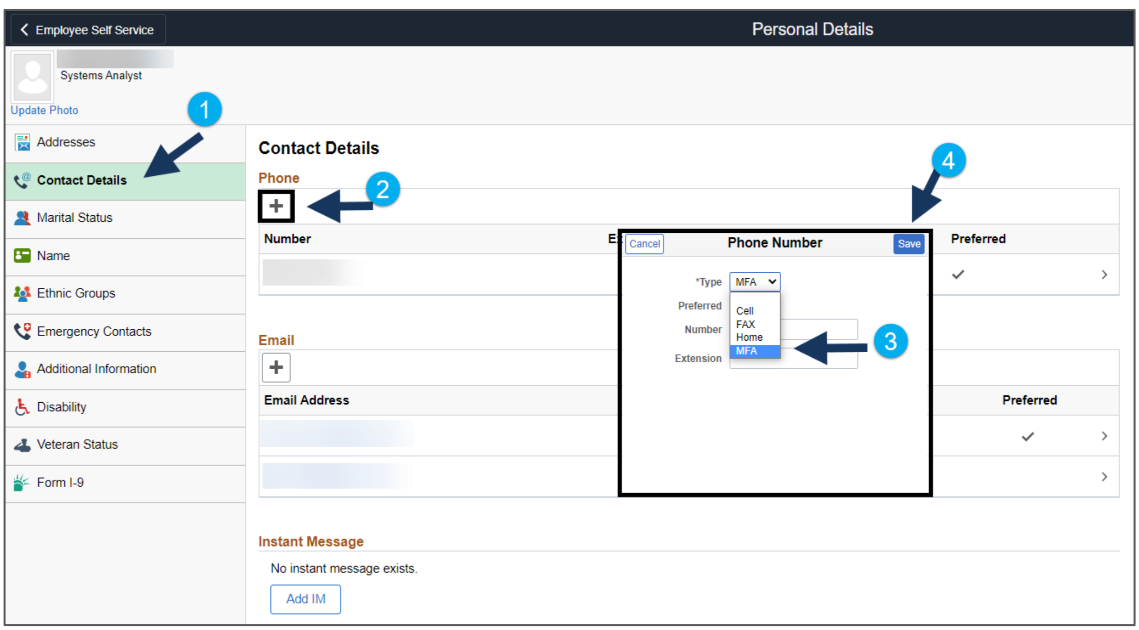
4. Check to see that you have an **email address** on file to receive notifications. Make changes as needed and click **Save.**



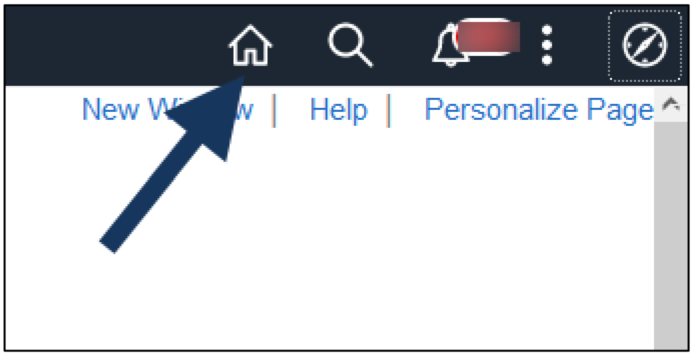
5. Navigate back to the **Employee Self Service** Home page, click on the **Personal Details** tile.



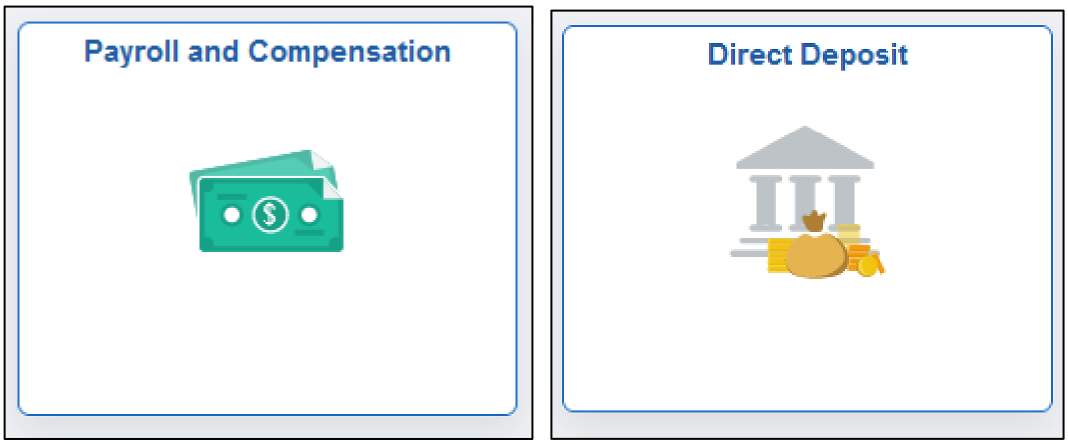
6. Click Contact Details.
7. Click the + to add MFA phone number.
8. Click the dropdown next to *Type and select MFA.
9. Enter the phone number.
10. Click Save.



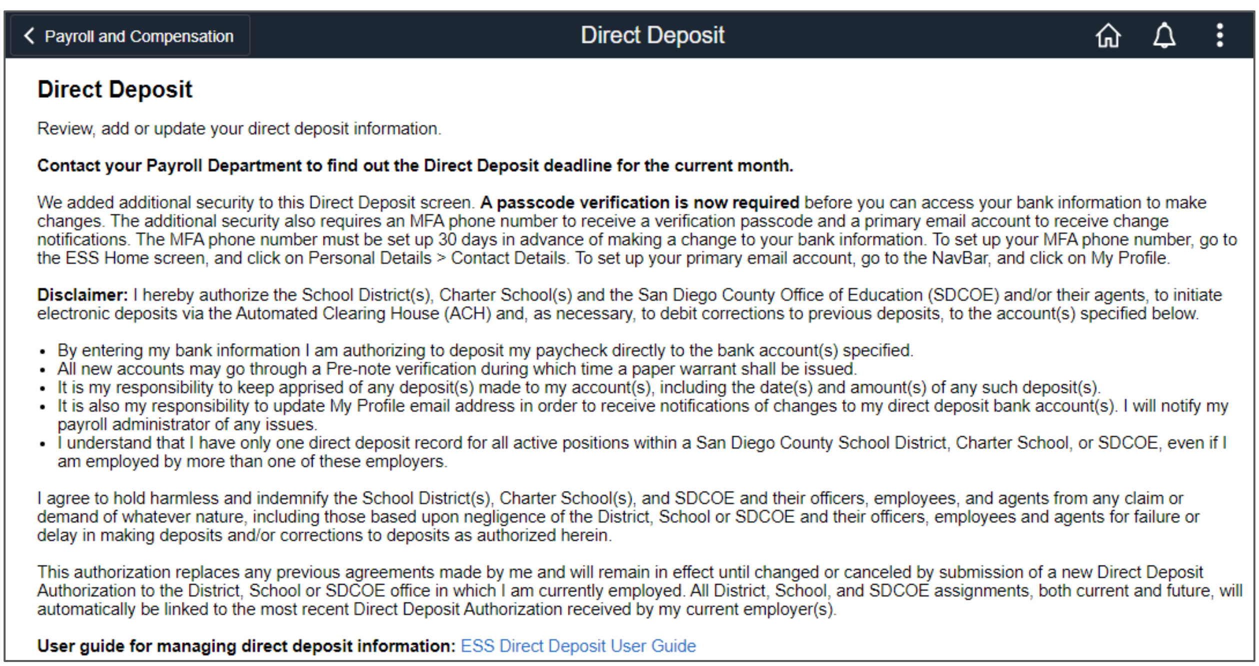
11. Click on the Home icon in the upper right corner.



12. Click on the Payroll and Compensation tile then the Direct Deposit tile



13. Read through **Disclaimer**.



Payroll and Compensation | Direct Deposit

Direct Deposit

Review, add or update your direct deposit information.

Contact your Payroll Department to find out the Direct Deposit deadline for the current month.

We added additional security to this Direct Deposit screen. **A passcode verification is now required** before you can access your bank information to make changes. The additional security also requires an MFA phone number to receive a verification passcode and a primary email account to receive change notifications. The MFA phone number must be set up 30 days in advance of making a change to your bank information. To set up your MFA phone number, go to the ESS Home screen, and click on Personal Details > Contact Details. To set up your primary email account, go to the NavBar, and click on My Profile.

Disclaimer: I hereby authorize the School District(s), Charter School(s) and the San Diego County Office of Education (SDCOE) and/or their agents, to initiate electronic deposits via the Automated Clearing House (ACH) and, as necessary, to debit corrections to previous deposits, to the account(s) specified below.

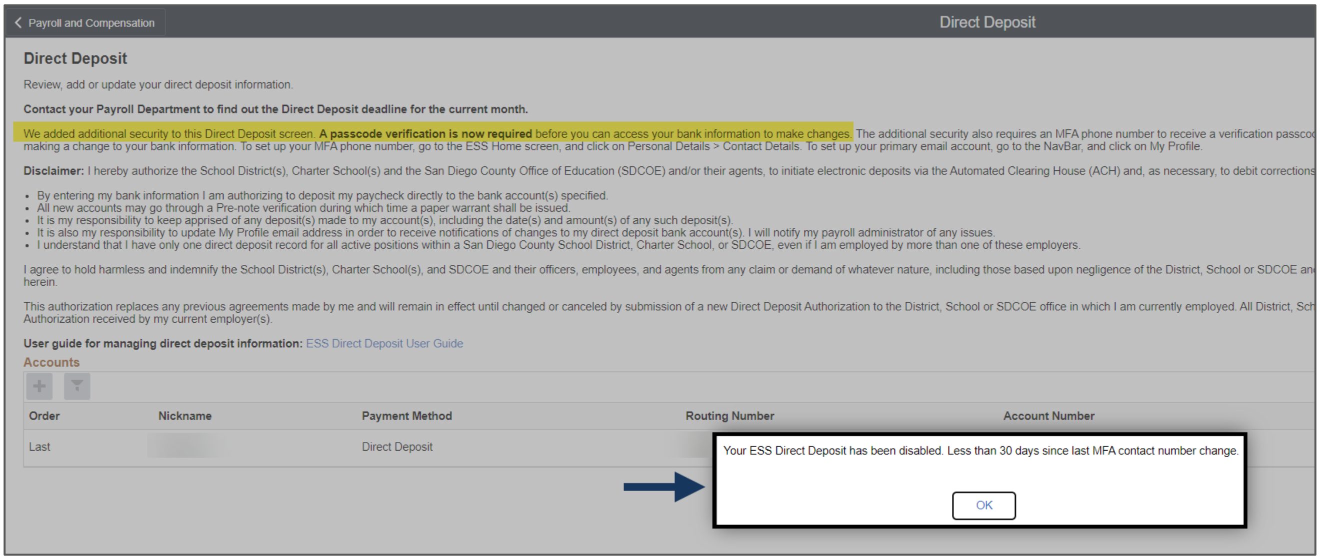
- By entering my bank information I am authorizing to deposit my paycheck directly to the bank account(s) specified.
- All new accounts may go through a Pre-note verification during which time a paper warrant shall be issued.
- It is my responsibility to keep apprised of any deposit(s) made to my account(s), including the date(s) and amount(s) of any such deposit(s).
- It is also my responsibility to update My Profile email address in order to receive notifications of changes to my direct deposit bank account(s). I will notify my payroll administrator of any issues.
- I understand that I have only one direct deposit record for all active positions within a San Diego County School District, Charter School, or SDCOE, even if I am employed by more than one of these employers.

I agree to hold harmless and indemnify the School District(s), Charter School(s), and SDCOE and their officers, employees, and agents from any claim or demand of whatever nature, including those based upon negligence of the District, School or SDCOE and their officers, employees and agents for failure or delay in making deposits and/or corrections to deposits as authorized herein.

This authorization replaces any previous agreements made by me and will remain in effect until changed or canceled by submission of a new Direct Deposit Authorization to the District, School or SDCOE office in which I am currently employed. All District, School, and SDCOE assignments, both current and future, will automatically be linked to the most recent Direct Deposit Authorization received by my current employer(s).

User guide for managing direct deposit information: ESS Direct Deposit User Guide

14. A notice will appear if the 30-day waiting period has not been met.

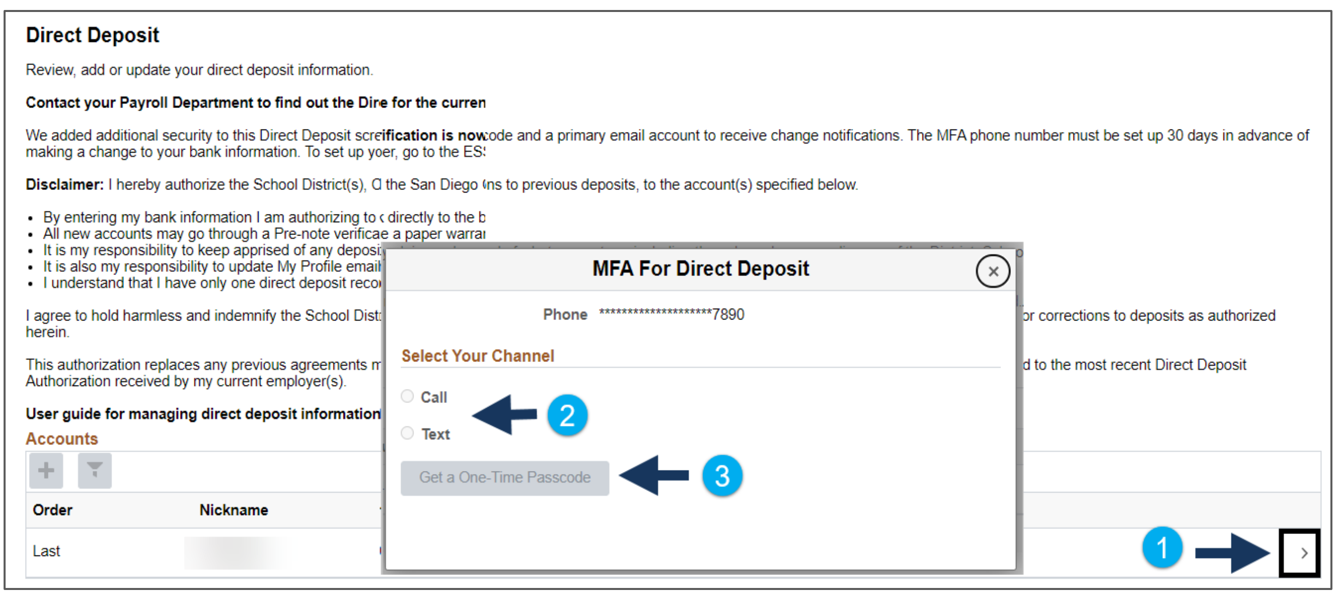


15. Once the 30-day waiting has passed, you will be able to add/change your direct deposit information by requesting and using the verification code. **Note: the code will expire after 15 minutes.**

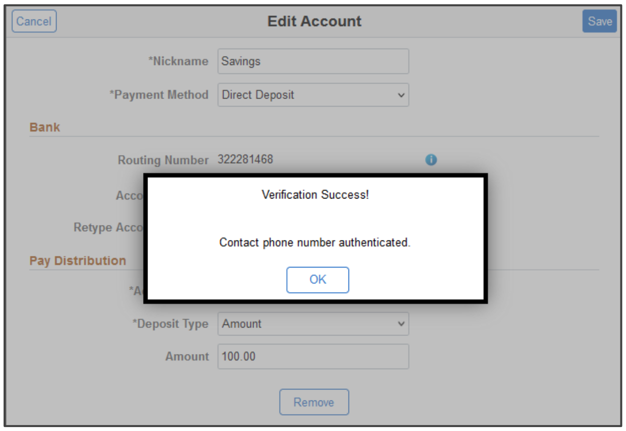
16. Click the arrow > on the Direct Deposit screen.

17. Click Call or Text to receive the One-Time Passcode

18. Click Get a One-Time Passcode.



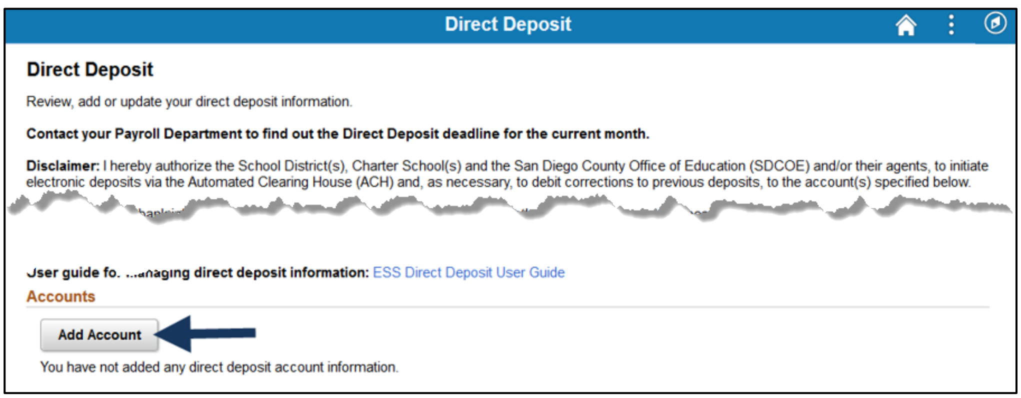
19. Once the verification code has been entered you will receive the following confirmation.



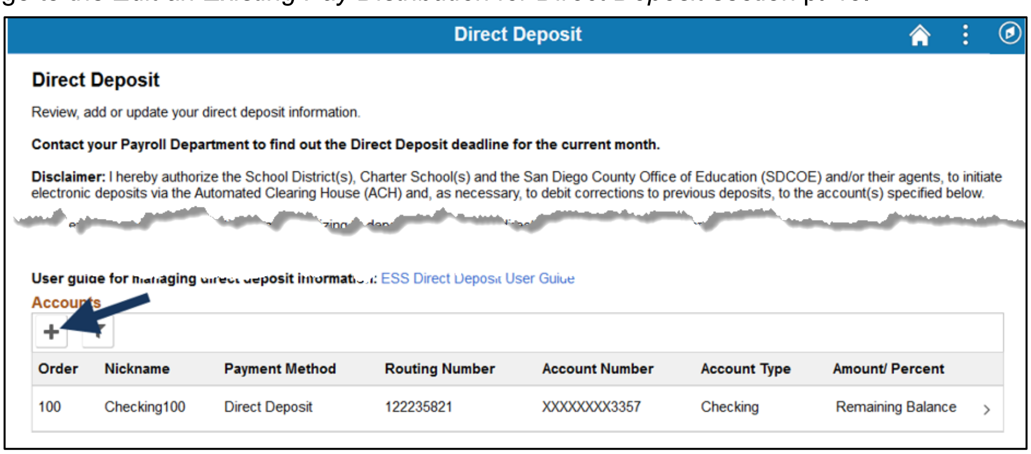
20. The code will expire after 15 minutes. **Note:** If you create a new session or navigate to ESS direct deposit in a new window within the same session, you will have to re-authenticate even if you are within the 15 mins of the previous authentication time.

21. To **add an account**, there are 2 ways depending on whether this is first time set up.

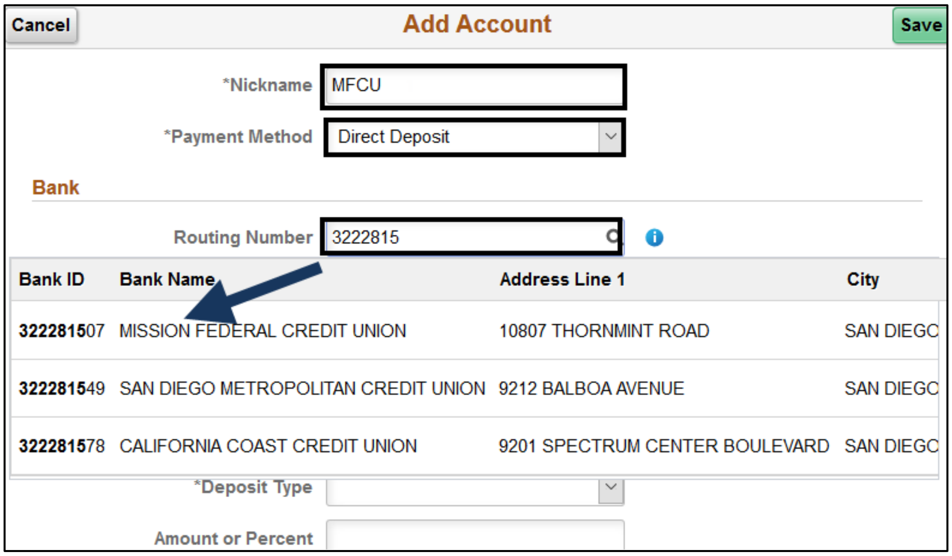
- **First Time setup**: **click Add account** under the Disclaimer



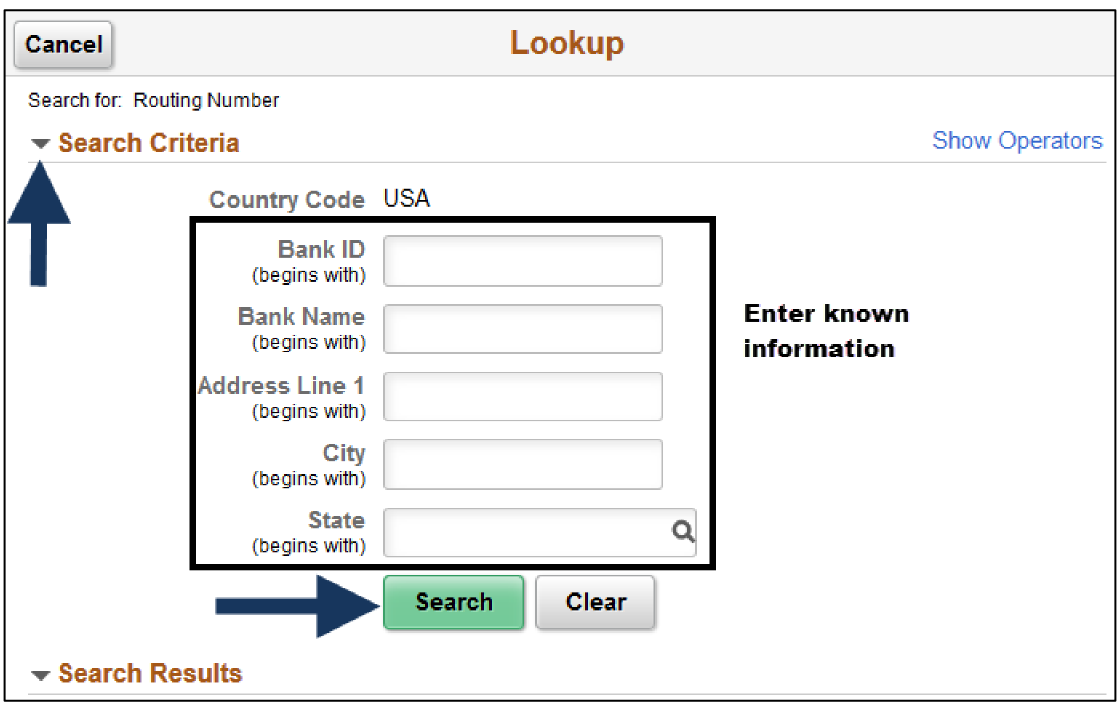
- **Add another account:** click the plus sign (+) under *Accounts.*
  If you already have an account listed and need to make changes to the distribution of funds, go to the *Edit an Existing Pay Distribution for Direct Deposit* section p. 46.

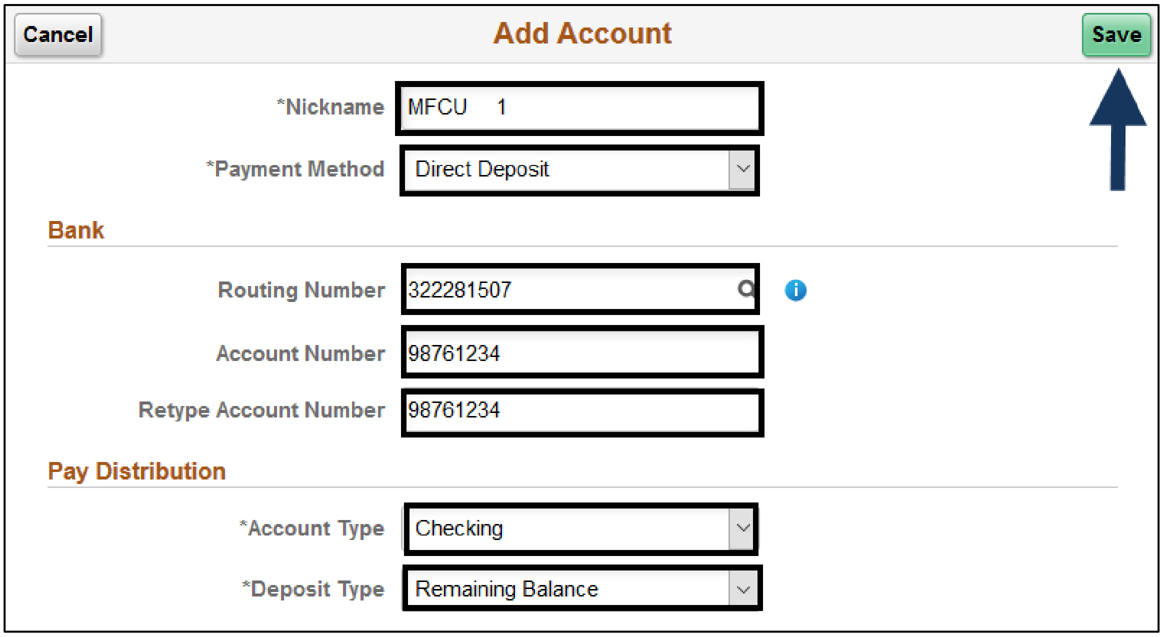


22. Enter all information on the **Add Direct Deposit** screen, asterisk items (*) are required:



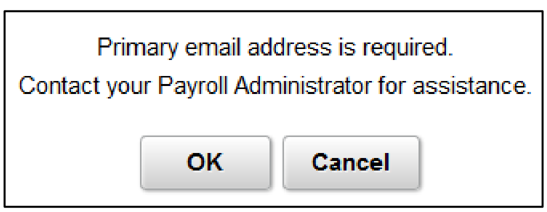
- ***Nickname:** Choose any name you want for this account
- ***Payment Method:** Choose Direct Deposit
- ***Routing Number:** Begin typing routing number and dropdown list appears. Or you can use the magnifying glass to do a look up.



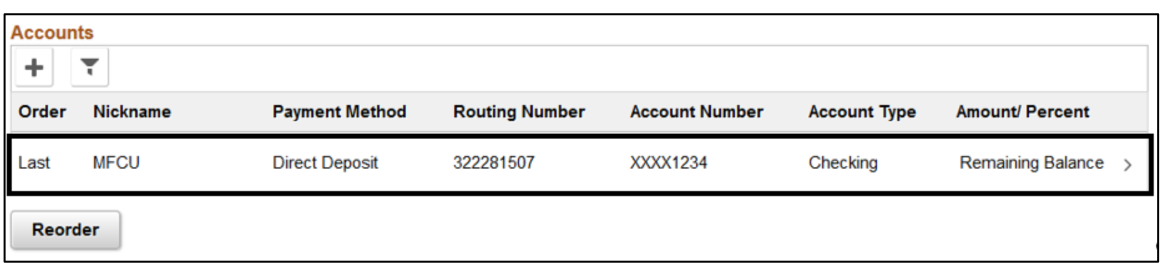


- **Account Number:**
- ***Account Type:** Checking, Issue Check or Savings
- ***Deposit Type:** Amount, Percent, Remaining Balance
- **Amount or Percent:** Based on what was selected for Deposit Type
  - **Amount:** Enter the flat dollar amount to be deposited. *Example: 300*
  - **Percent:** Enter the percent of pay to be deposited. *Example: 10*

23. **Click Save.** Message comes up reminding you that a Primary email address is required. **Click OK.**



24. **Account will now be listed** depending on whether this is the first account you are adding or if you have added an additional account.



IMPORTANT: Verify the Order of Accounts: Determines the order in which multiple direct deposit accounts are processed, Refer to Order of Accounts p, 41

25. **Verify that information is correct.** If changes need to be made go to *Edit an Existing Pay Distribution Direct Deposit* section p. 46.
26. **Email notification** will be sent to alert you that a change was made to your account. If you did not make the change, please contact your payroll administration team at your district.

> **From:**
> **Date:** June 23, 2020 at 8:26:04 AM PDT
> **To:**
> **Subject: Your direct deposit request has been submitted.**
>
> Your direct deposit request on 2020-06-23 08.26.03.000000 has been successfully submitted.
>
> However, due to the timing, your direct deposit change may not be reflected on the next paycheck.
>
> If you did not change your direct deposit data, please contact your payroll administrator immediately.
>
> This is a system-generated email. Do not reply to this email.

27. **Next step:**
    a. If you need to **add another account,** click on plus sign (+) below Account and go back to step 6.
    b. If you are **done**, click on the 3 dots in the upper right and click on Sign Out.

Example of Direct Deposit with multiple accounts

Reminder: Verify the Order of Accounts:

Accounts

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
1	SDCCU Checking	Direct Deposit	322281617	XXXX7788	Checking	10.00%
2	MFCU Savings	Direct Deposit	322281507	XXXX4321	Savings	$500.00
Last	MFCU	Direct Deposit	322281507	XXXX1234	Checking	Remaining Balance

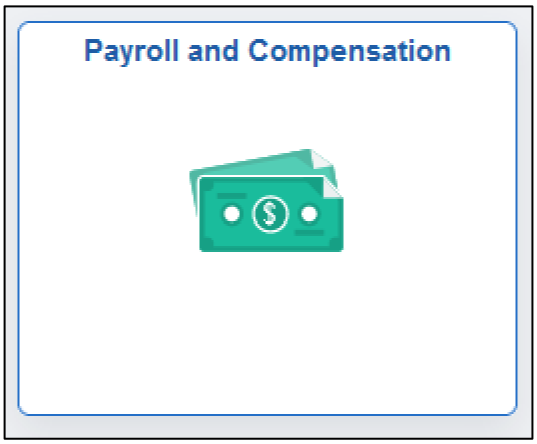
Reorder

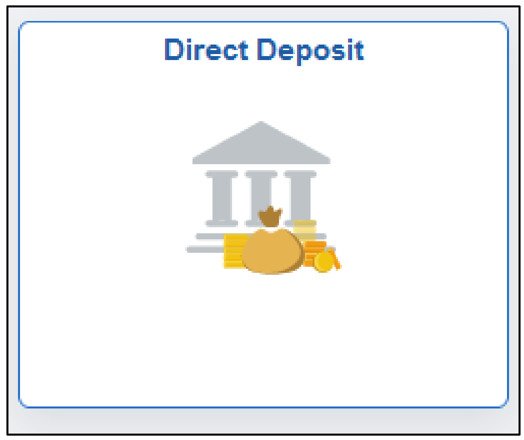
Editing an Existing Pay Distribution for Direct Deposit

The purpose of this section is to show you how to edit the pay distribution for your Direct Deposit.

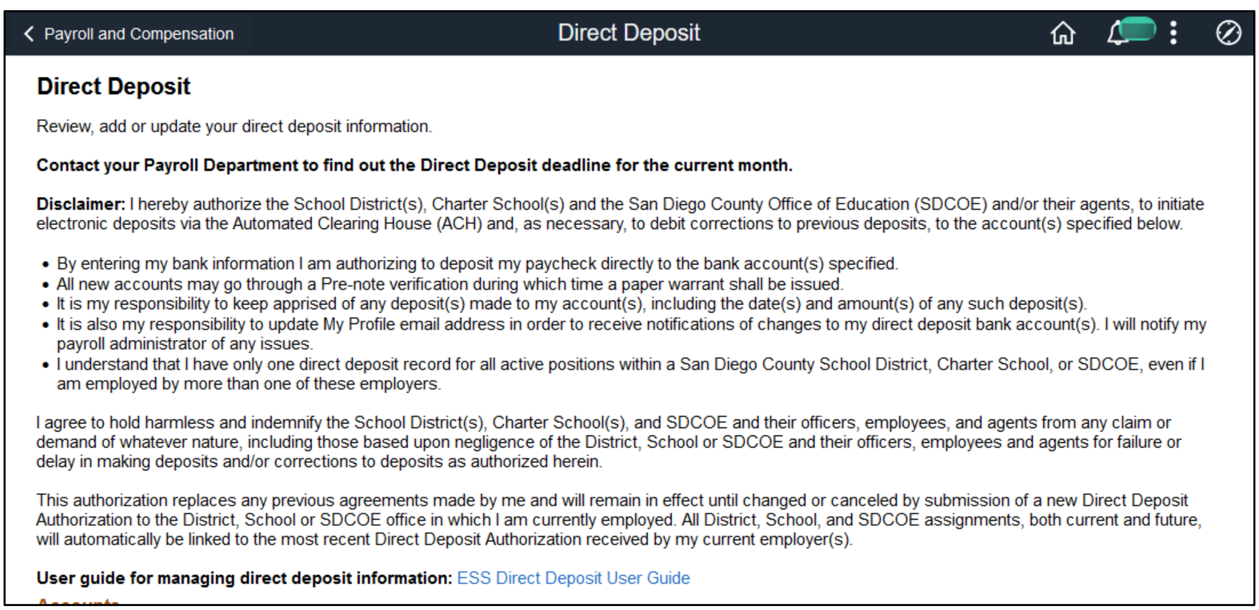
NOTE: Changes to the Routing and Accounts Numbers cannot be made. A new account will need to be created so it triggers the process to verify the account with the bank before an actual check is processed.

1. Log into PeopleSoft Employee Self-Service (ESS) *https://ess.erp.sdcoe.net*
2. Click on the **Payroll and Compensation** tile then the **Direct Deposit** tile





3. Read through **Disclaimer**.


Payroll and Compensation

Direct Deposit

Direct Deposit

Review, add or update your direct deposit information.

Contact your Payroll Department to find out the Direct Deposit deadline for the current month.

Disclaimer: I hereby authorize the School District(s), Charter School(s) and the San Diego County Office of Education (SDCOE) and/or their agents, to initiate electronic deposits via the Automated Clearing House (ACH) and, as necessary, to debit corrections to previous deposits, to the account(s) specified below.

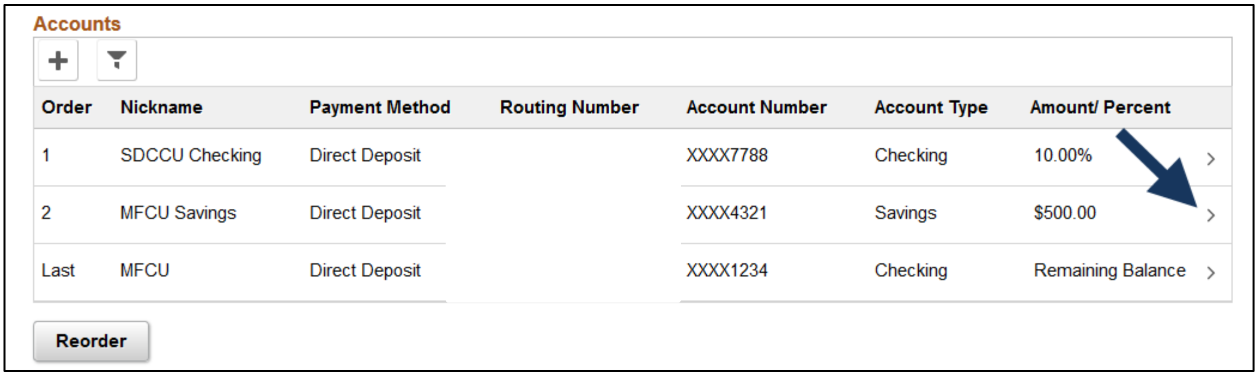
- By entering my bank information I am authorizing to deposit my paycheck directly to the bank account(s) specified.
- All new accounts may go through a Pre-note verification during which time a paper warrant shall be issued.
- It is my responsibility to keep apprised of any deposit(s) made to my account(s), including the date(s) and amount(s) of any such deposit(s).
- It is also my responsibility to update My Profile email address in order to receive notifications of changes to my direct deposit bank account(s). I will notify my payroll administrator of any issues.
- I understand that I have only one direct deposit record for all active positions within a San Diego County School District, Charter School, or SDCOE, even if I am employed by more than one of these employers.

I agree to hold harmless and indemnify the School District(s), Charter School(s), and SDCOE and their officers, employees, and agents from any claim or demand of whatever nature, including those based upon negligence of the District, School or SDCOE and their officers, employees and agents for failure or delay in making deposits and/or corrections to deposits as authorized herein.

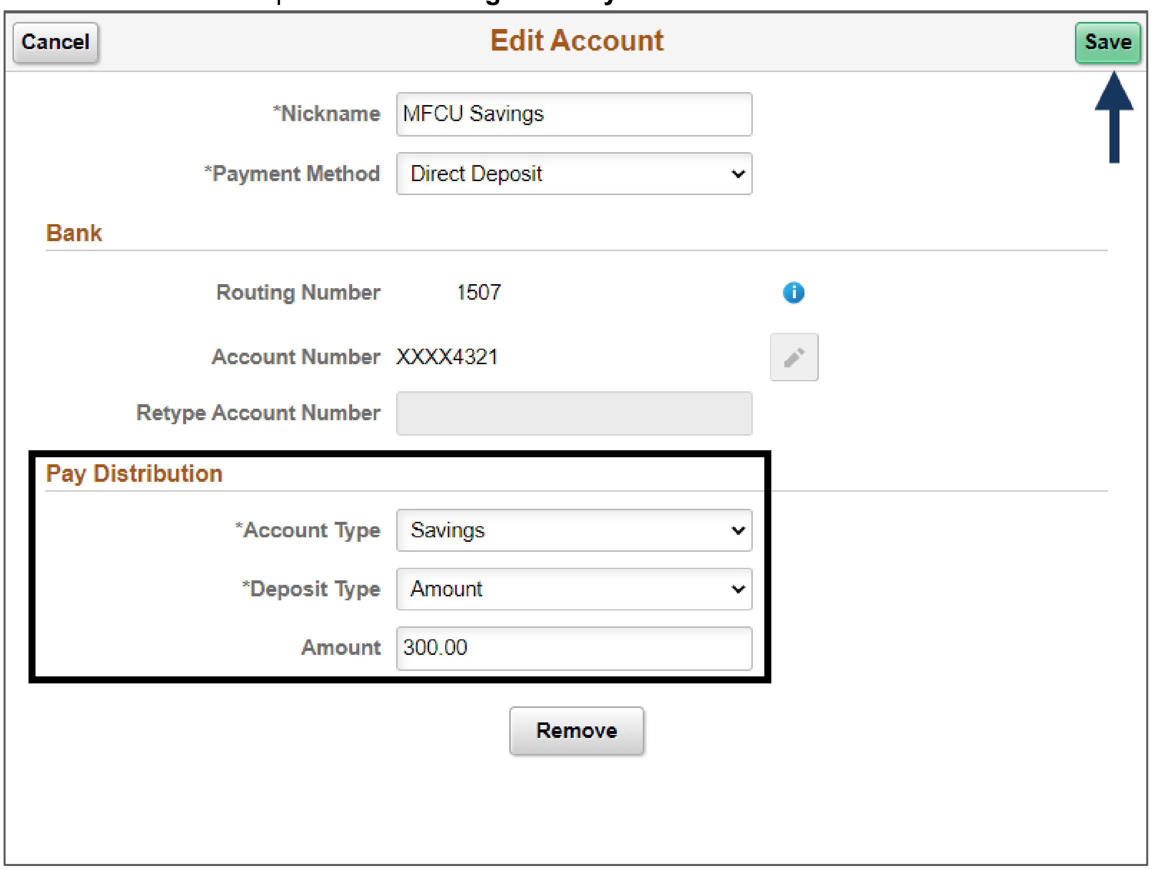
This authorization replaces any previous agreements made by me and will remain in effect until changed or canceled by submission of a new Direct Deposit Authorization to the District, School or SDCOE office in which I am currently employed. All District, School, and SDCOE assignments, both current and future, will automatically be linked to the most recent Direct Deposit Authorization received by my current employer(s).

User guide for managing direct deposit information: ESS Direct Deposit User Guide

4. Accounts you have set up will be listed. To Edit the Amount, Percentage, or Remaining Balance, **click on the greater than sign (>)** on the right to Edit.

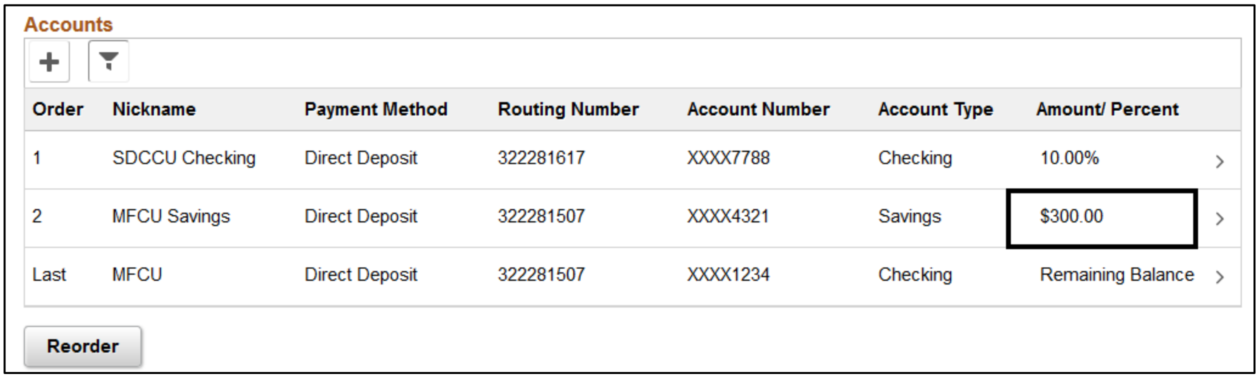


5. **Edit Account** screen opens. **Make changes to Pay Distribution information. Click Save.**



6. 3 Options from this screen:
    a. Click **Save** when done.
    b. Click **Remove** to remove the account.
    c. Click **Cancel** if no changes need to be made.

7. Review **Accounts**. Notice that your change has been made.



Accounts

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
1	SDCCU Checking	Direct Deposit	322281617	XXXX7788	Checking	10.00%
2	MFCU Savings	Direct Deposit	322281507	XXXX4321	Savings	$300.00
Last	MFCU	Direct Deposit	322281507	XXXX1234	Checking	Remaining Balance

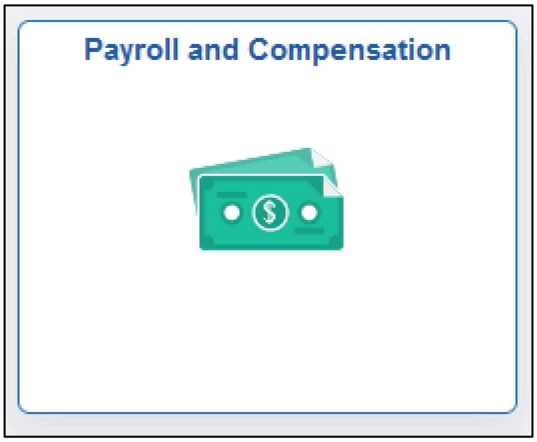
Reorder

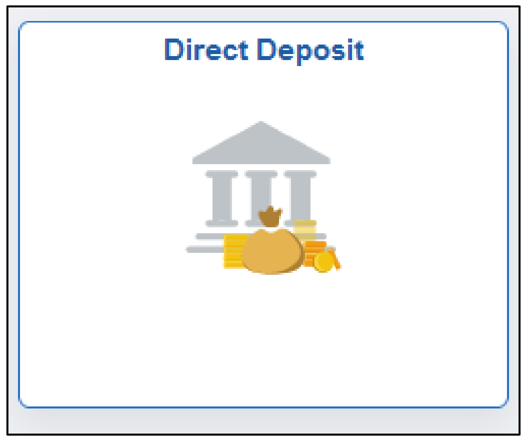
Editing an Existing Pay Distribution for Direct Deposit

The purpose of this section is to show you how to edit the pay distribution for your Direct Deposit.

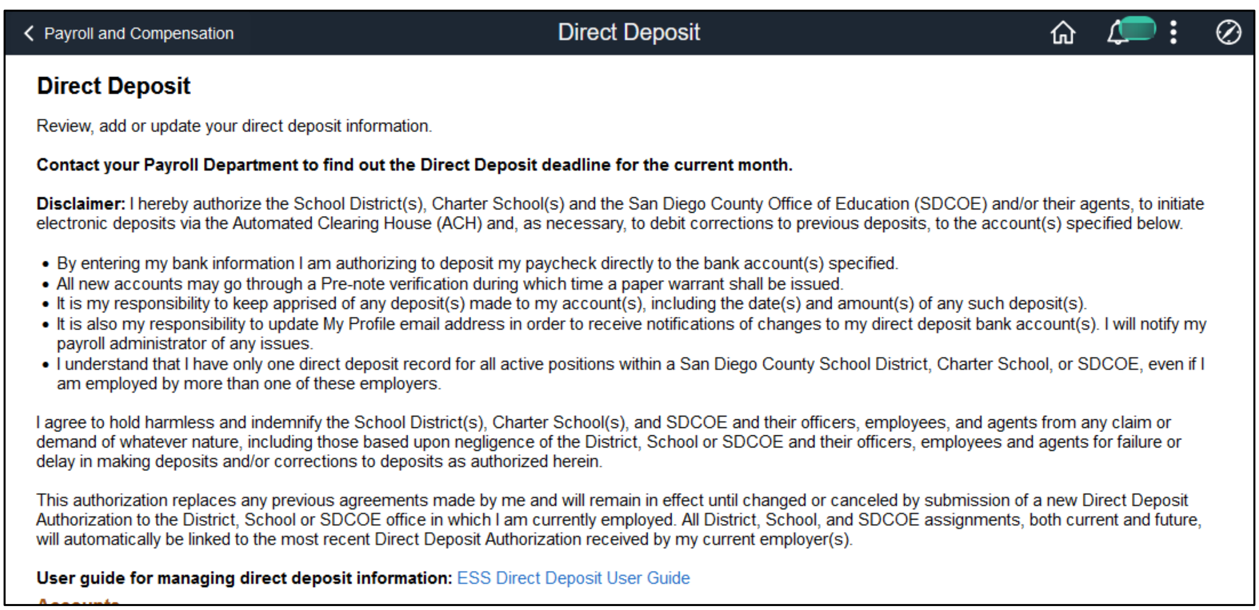
NOTE: Changes to the Routing and Accounts Numbers cannot be made. A new account will need to be created so it triggers the process to verify the account with the bank before an actual check is processed.

1. Log into [PeopleSoft Employee Self-Service (ESS)](https://ess.erp.sdcoe.net) *https://ess.erp.sdcoe.net*
2. Click on the **Payroll and Compensation** tile then the **Direct Deposit** tile





3. Read through **Disclaimer**.



< Payroll and Compensation   Direct Deposit

Direct Deposit

Review, add or update your direct deposit information.

Contact your Payroll Department to find out the Direct Deposit deadline for the current month.

Disclaimer: I hereby authorize the School District(s), Charter School(s) and the San Diego County Office of Education (SDCOE) and/or their agents, to initiate electronic deposits via the Automated Clearing House (ACH) and, as necessary, to debit corrections to previous deposits, to the account(s) specified below.

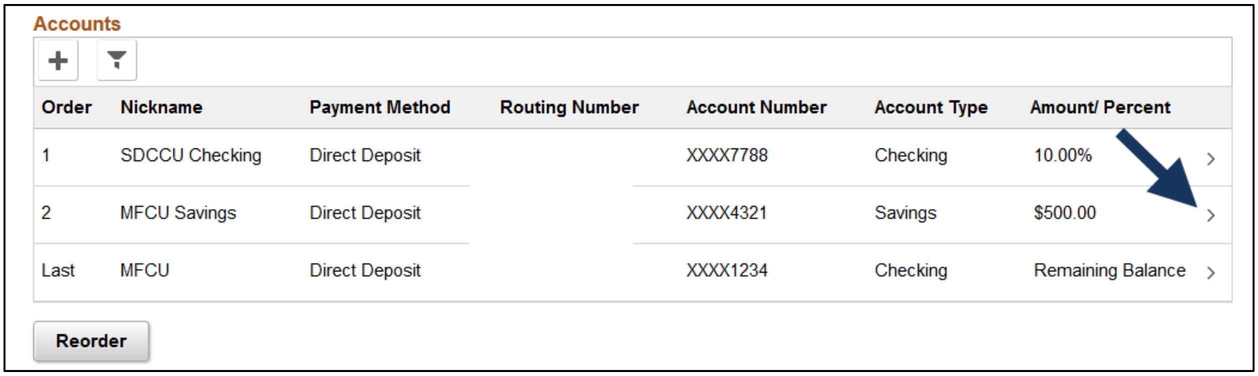
- By entering my bank information I am authorizing to deposit my paycheck directly to the bank account(s) specified.
- All new accounts may go through a Pre-note verification during which time a paper warrant shall be issued.
- It is my responsibility to keep apprised of any deposit(s) made to my account(s), including the date(s) and amount(s) of any such deposit(s).
- It is also my responsibility to update My Profile email address in order to receive notifications of changes to my direct deposit bank account(s). I will notify my payroll administrator of any issues.
- I understand that I have only one direct deposit record for all active positions within a San Diego County School District, Charter School, or SDCOE, even if I am employed by more than one of these employers.

I agree to hold harmless and indemnify the School District(s), Charter School(s), and SDCOE and their officers, employees, and agents from any claim or demand of whatever nature, including those based upon negligence of the District, School or SDCOE and their officers, employees and agents for failure or delay in making deposits and/or corrections to deposits as authorized herein.

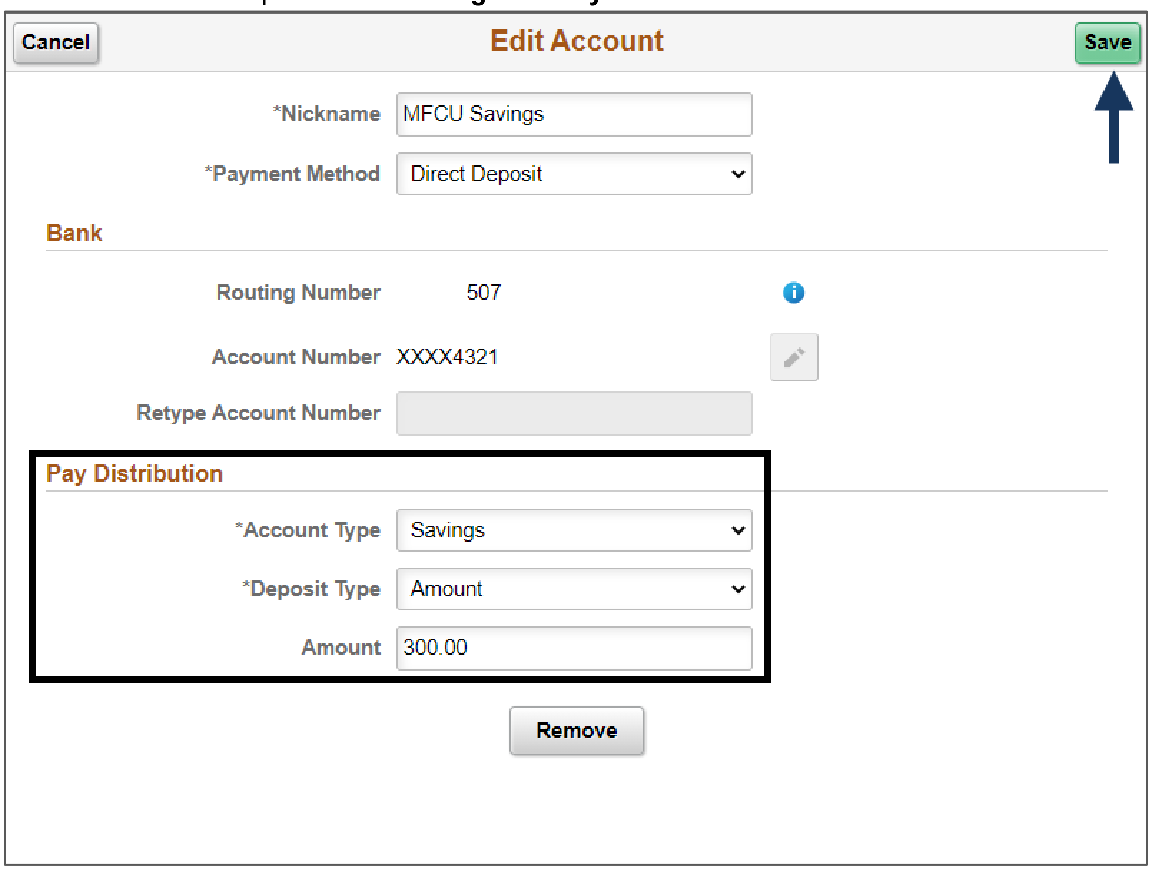
This authorization replaces any previous agreements made by me and will remain in effect until changed or canceled by submission of a new Direct Deposit Authorization to the District, School or SDCOE office in which I am currently employed. All District, School, and SDCOE assignments, both current and future, will automatically be linked to the most recent Direct Deposit Authorization received by my current employer(s).

User guide for managing direct deposit information: ESS Direct Deposit User Guide

4. Accounts you have set up will be listed. To Edit the Amount, Percentage, or Remaining Balance, **click on the greater than sign (>)** on the right to Edit.



5. Edit Account screen opens. **Make changes to Pay Distribution information**. Click **Save.**



6. 3 Options from this screen:
   a. Click **Save** when done.
   b. Click **Remove** to remove the account.
   c. Click **Cancel** if no changes need to be made.

7. Review **Accounts**. Notice that your change has been made.

Accounts

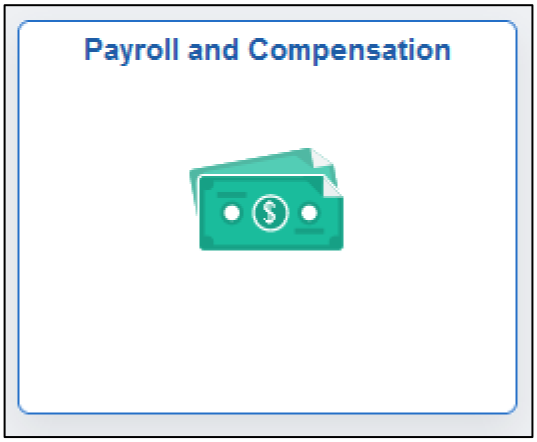
Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
1	SDCCU Checking	Direct Deposit	322281617	XXXX7788	Checking	10.00%
2	MFCU Savings	Direct Deposit	322281507	XXXX4321	Savings	$\boxed{\$300.00}$
Last	MFCU	Direct Deposit	322281507	XXXX1234	Checking	Remaining Balance

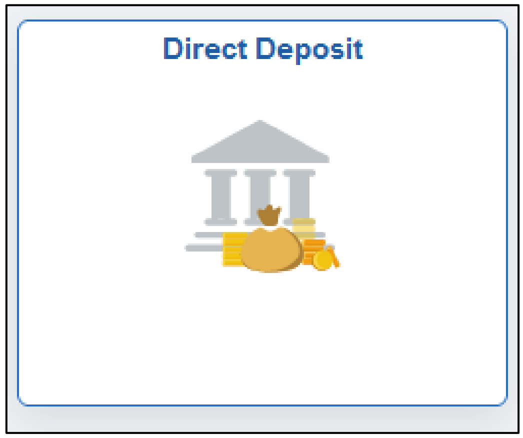
Reorder

Removing an Existing Direct Deposit

The purpose of this section is to show you how to remove a line on your Direct Deposit setup.

1. Log into [PeopleSoft Employee Self-Service (ESS)](https://ess.erp.sdcoe.net) *https://ess.erp.sdcoe.net*
2. Click on the **Payroll and Compensation** tile then the **Direct Deposit** tile





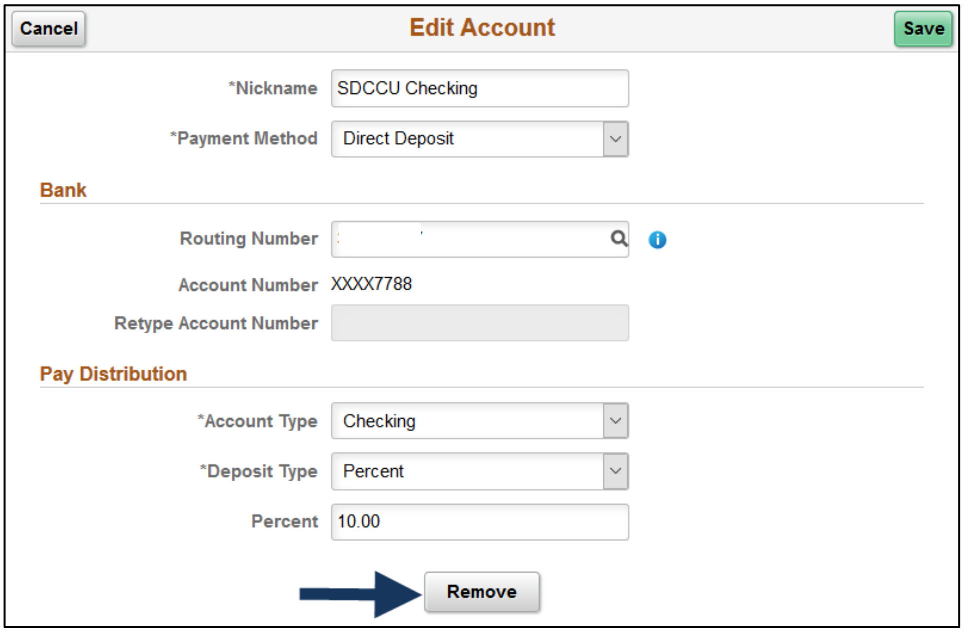
3. Accounts you have set up will be listed. Click **the greater than sign (>)** on the right side of account you want removed.

Accounts

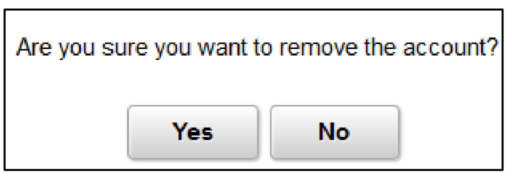
Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent	
1	SDCCU Checking	Direct Deposit	322281617	XXXX7788	Checking	10.00%	>
2	MFCU Savings	Direct Deposit	322281507	XXXX4321	Savings	$300.00	>
Last	MFCU	Direct Deposit	322281507	XXXX1234	Checking	Remaining Balance	>

Reorder

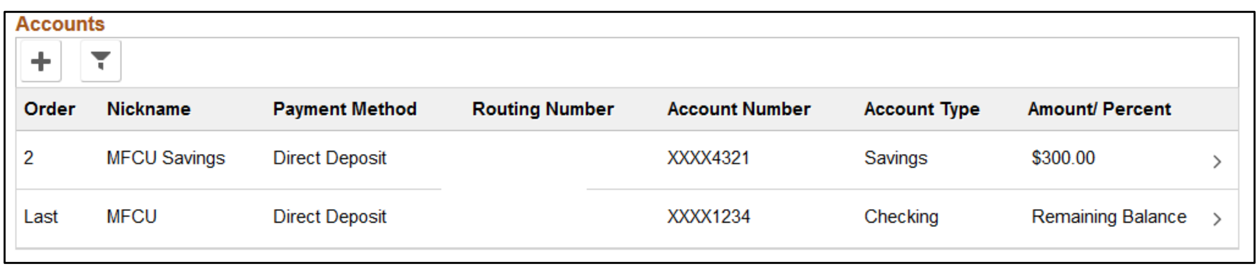
4. Edit Account screen opens. **Click Remove.**



5. Message pops up asking, “Are you sure you want to remove the account?” Click Yes or No.

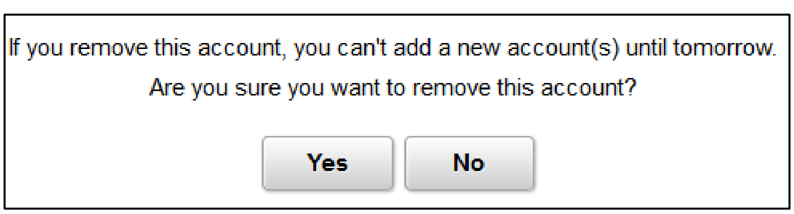


6. You can now see that the **line has been removed**.


Accounts

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
2	MFCU Savings	Direct Deposit		XXXX4321	Savings	$300.00
Last	MFCU	Direct Deposit		XXXX1234	Checking	Remaining Balance

7. If you remove all accounts, you will get this message.



IMPORTANT: Order of Accounts

Always check the Order numbers to be sure accounts are coming out in the correct order. This is what tells the system what to do when for distributing your paycheck.

***Remaining Balance* should always be LAST or the highest number when listing multiple accounts**

Incorrect Order set up:

- Order #99 will take 10% to Savings1
- Order #100 will take Remaining Balance to Checking100
- Order #101 can NOT take $500 for US Bank 1 because all the money was taken in Order #100

Accounts

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
99	Savings 1	Direct Deposit		XXXX8899	Savings	10.00%
100	Checking100	Direct Deposit		XXXXXXXX3357	Checking	Remaining Balance
101	US Bank 1	Direct Deposit		XXXX0737	Savings	$500.00

Reorder

Correct Order set up

- Order #1 will take 10% to SDCCU Checking
- Order #2 will take $300 to MFCU Savings
- Order # LAST will take Remaining Balance to MFCU

Accounts

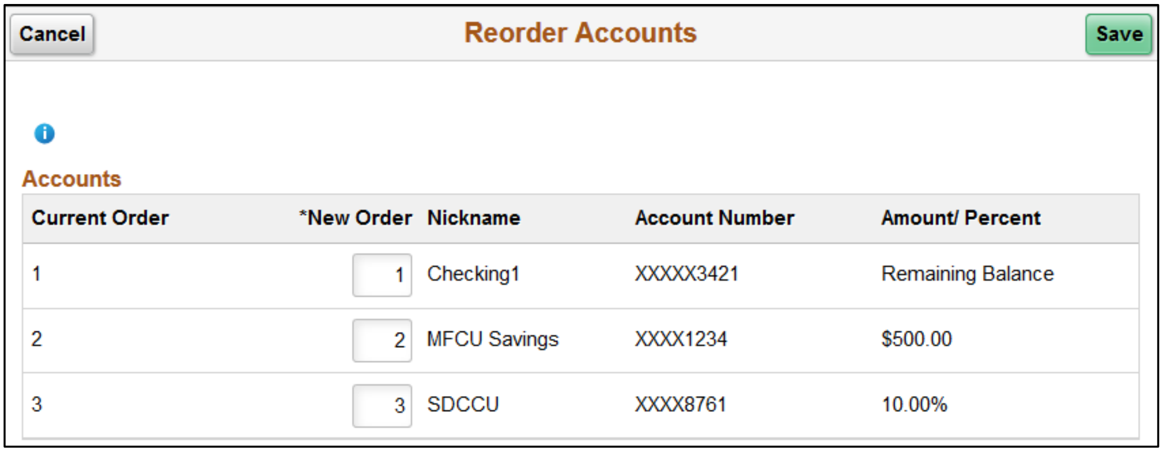
Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
1	SDCCU Checking	Direct Deposit		XXXX7788	Checking	10.00%
2	MFCU Savings	Direct Deposit		XXXX4321	Savings	$300.00
Last	MFCU	Direct Deposit		XXXX1234	Checking	Remaining Balance

Reorder

Things to note due to change in the Direct Deposit process:

- Remaining Balance or Balance of Net Pay **may not be LAST** or the highest number. When adding a new account, it will change to “Last”, or you can change the Order number.
- Entries prior to July 6, 2020, **numbering could be random** and not sequential.
- When reordering, **system may only allow you to use the number you currently have**. In this case, change the numbers to correct sequence.

8. Click on **Reorder** button to change order. In this scenario, Remaining Balance account was already in the system (Order #1). Two additional accounts were added that became Order #2 and Order #3.

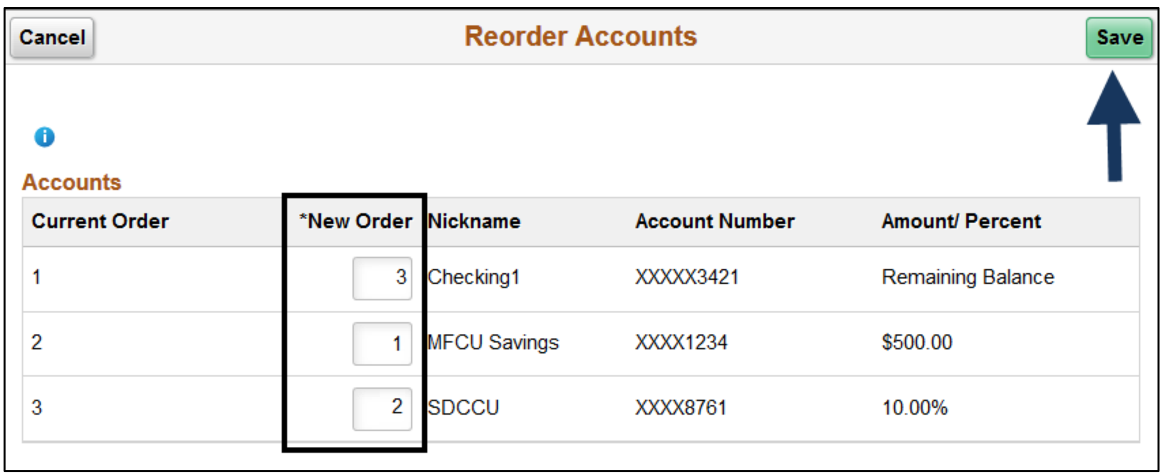


Cancel **Reorder Accounts** Save

Accounts

Current Order	*New Order	Nickname	Account Number	Amount/ Percent
1	1	Checking1	XXXXX3421	Remaining Balance
2	2	MFCU Savings	XXXX1234	$500.00
3	3	SDCCU	XXXX8761	10.00%

9. Since Remaining Balance account needs to be last, we would enter the correct numbers under **New Order** then click **Save.**

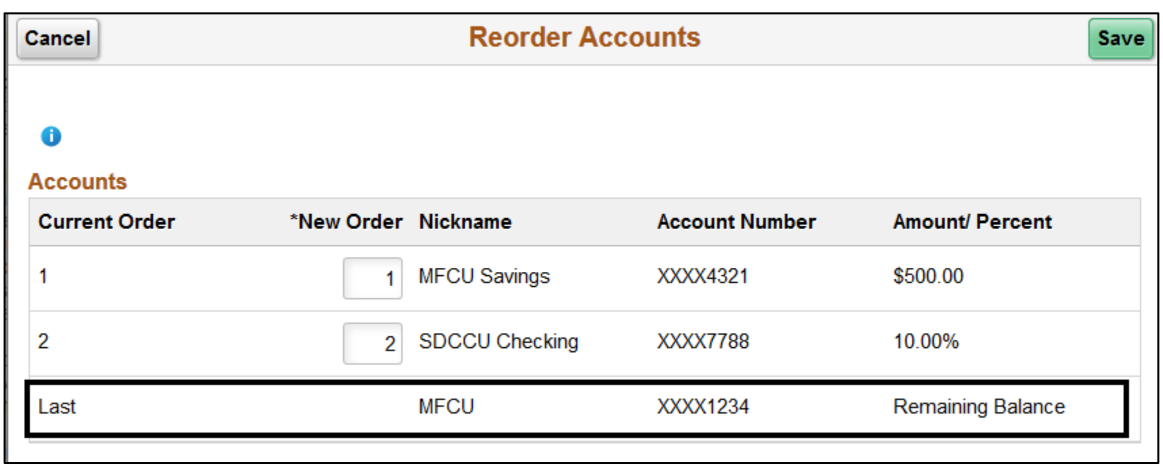


Cancel **Reorder Accounts** Save

Accounts

Current Order	*New Order	Nickname	Account Number	Amount/ Percent
1	3	Checking1	XXXXX3421	Remaining Balance
2	1	MFCU Savings	XXXX1234	$500.00
3	2	SDCCU	XXXX8761	10.00%

10. You see the new order and the Remaining Balance account is now “Last”.



Cancel **Reorder Accounts** Save

Accounts

Current Order	*New Order	Nickname	Account Number	Amount/ Percent
1	1	MFCU Savings	XXXX4321	$500.00
2	2	SDCCU Checking	XXXX7788	10.00%
Last		MFCU	XXXX1234	Remaining Balance

Part IV: Health and Benefits

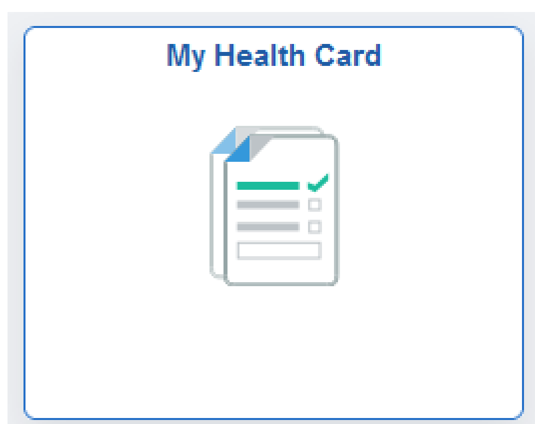
My Health Card

My Health Card tracks your information for TB tests, COVID-19 vaccinations and COVID-19 testing.

- **TB Information**
  - Must be updated by your Human Resources Department at your district.
  - You view only access if you district uses PeopleSoft for tracking.
- **COVID-19 vaccination and testing**
  - You can enter your own vaccination tracking and testing. For issues contact your district's HR department.
  - Here are links to **COVID-19 Vaccination and Testing guides**
    - COVID-19 Immunization Tracking: My Health Card Guide**.** (04/27/22, v1.7)
    - COVID-19 Testing Tracking: My Health Card Guide. (04/27/22 v1.1)
  - Here are links to **COVID-19 Vaccination and Testing Videos**
    - Entering COVID-19 Vaccination Information in ESS Video. (Sept. 2021)
    - Entering COVID-19 Testing Information in ESS Video. (Sept. 2021)
  - **Or you can access instructions by going** to the PeopleSoft Support website at crc.sdcoe.net > Resources > ESS and General Information. Scroll down to the COVID-19 Vaccination Testing and Tracking section. There are Guides and Videos.

To view your TB and COVID-19 information

1. Log into Employee Self Service
2. Click on the Health and Benefits tile, then the My Health Card tile.



Part IV: Personal Details

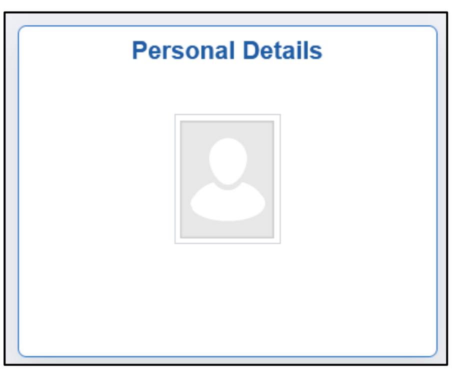
Personal Details

Click on Personal Details to see links associated with this section:

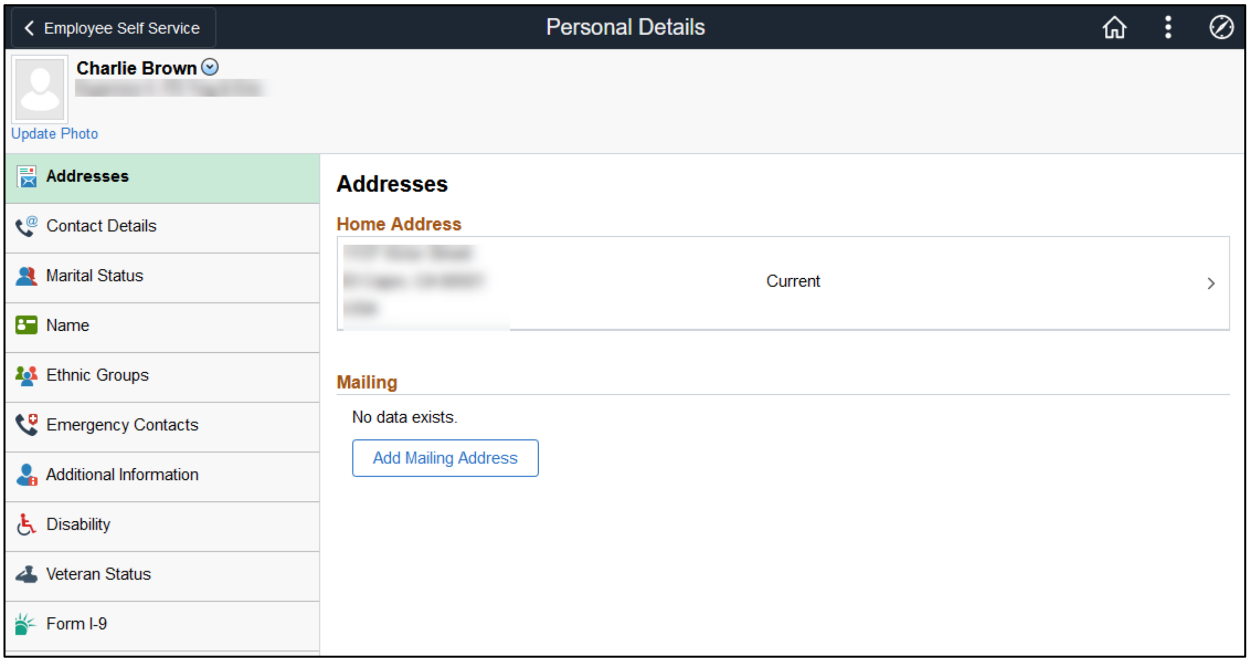
- **Addresses:** Home and mailing address
- **Contact Details:** Phone number and email address
- **Marital Status**
- **Name**
- **Ethnic Groups**
- **Emergency Contacts**
- **Additional Information**
- **Disability**
- **Veteran Status**
- **Form I-9**

Addresses: Updating Home, and Mailing Address

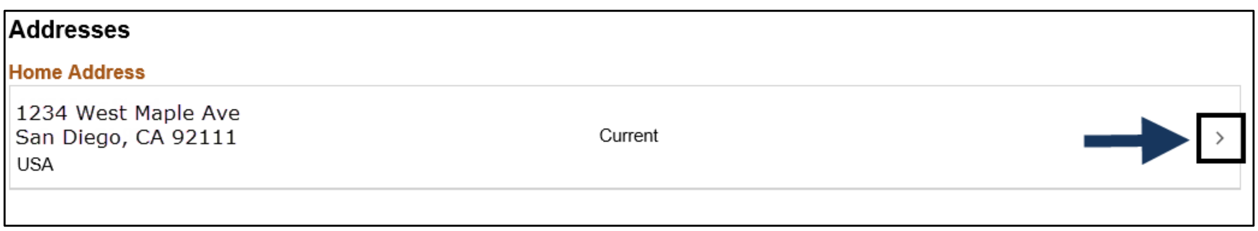
1. On the **Employee Self Service** Home page, click on the **Personal Details** tile.



2. Choose **Addresses** to update your address information.

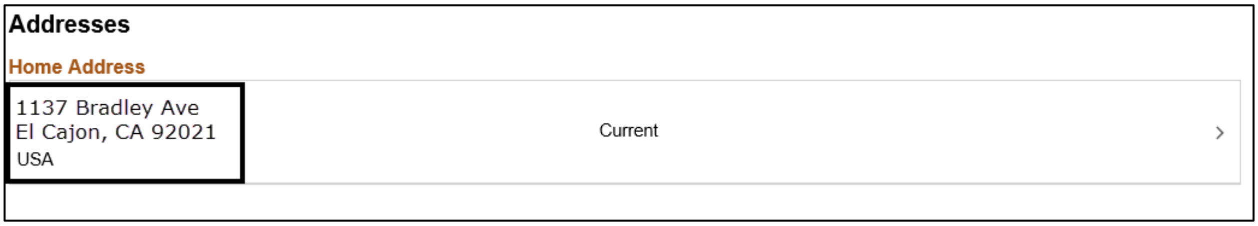


3. Click **>** to edit your **Current** address.



4. Enter **Change As Of** date and update Address field(s).

5. Click **Save** when finished. New address will be displayed.

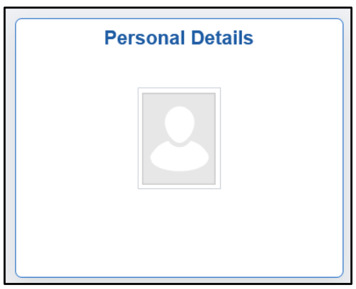


Contact Details: Adding/Updating Phone Number(s)

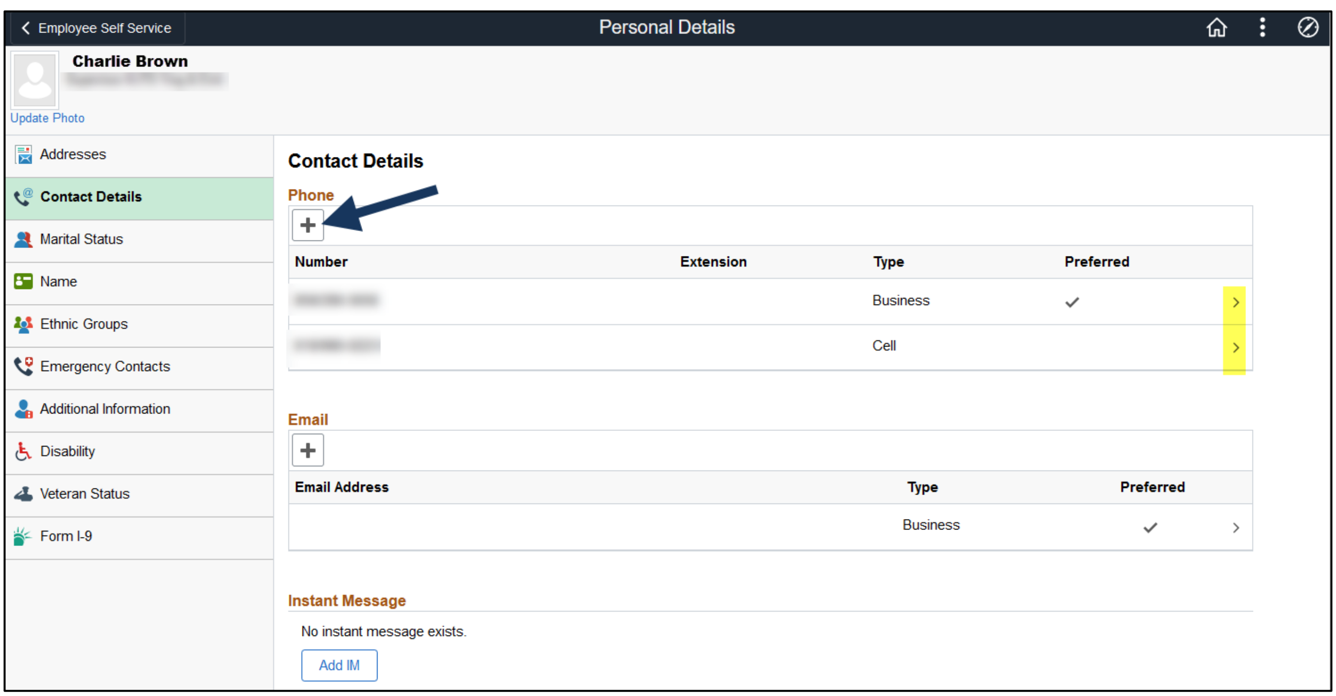
There are several Types of Phone Numbers:

- **Business** -populates from your HR department.
- **Optional Home or Cell** - can be used for additional contact.
- **Required MFA** – used for security verification when adding/updating ESS Direct Deposit information.

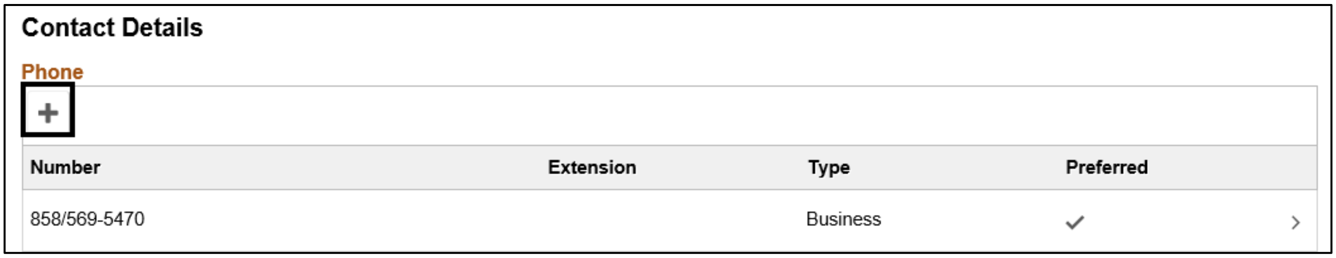
1. On the **Employee Self Service** Home page, click on the **Personal Details** tile.



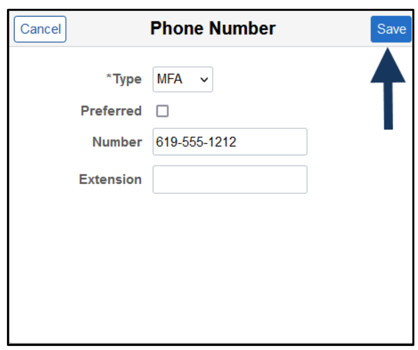
2. Choose **Contact Details** to add/update your phone number(s).



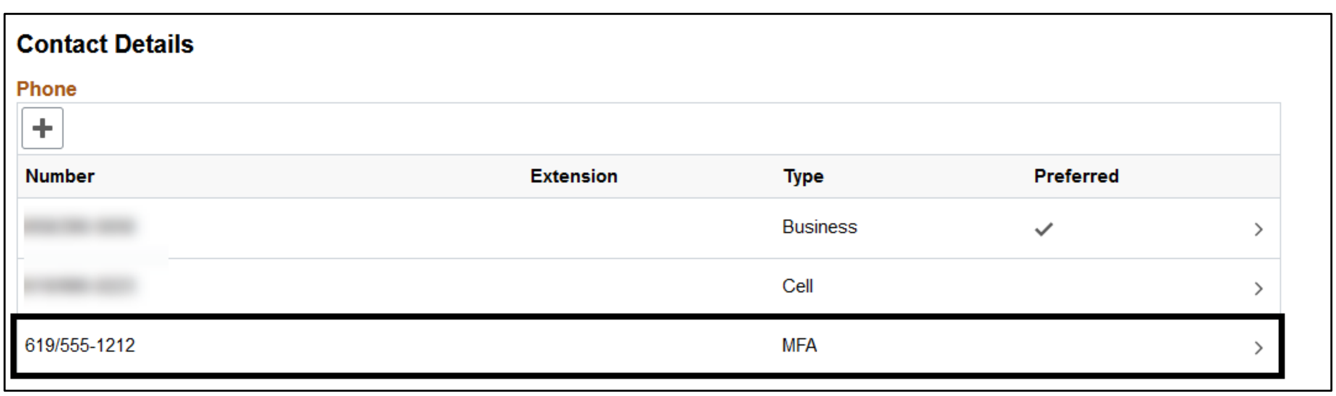
3. **Click +** to **Add** a new phone number



4. Add information:
   - **Type:** Cell, FAX, Home, MFA* (Business cannot be entered by employee)
     ***NOTE:** MFA is required to add or make changes to your Direct Deposit in ESS.
   - **Preferred**: Check box if this is your preferred form of contact
   - **Phone Number:** Enter number including area code. Number will format when you save
   - **Extension**: Enter if applicable
   - **Delete:** is available when editing the phone number

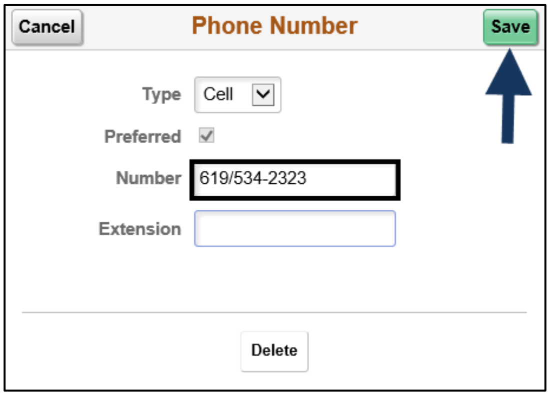


5. Click **Save** when finished.
6. New information will be listed

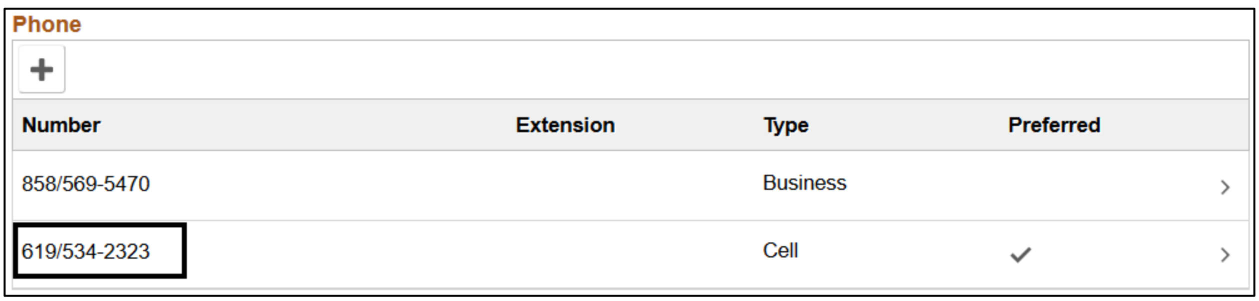


7. To **Edit** a phone number, **click >**. Make changes, click **Save.**

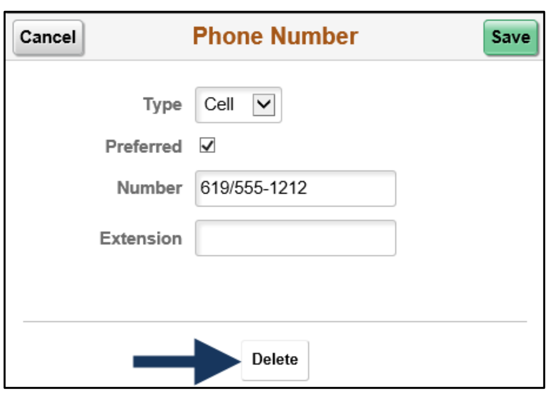
NOTE: You cannot remove Preferred checkmark. You need to designate another number as Preferred. This will remove Preferred from the other phone number.

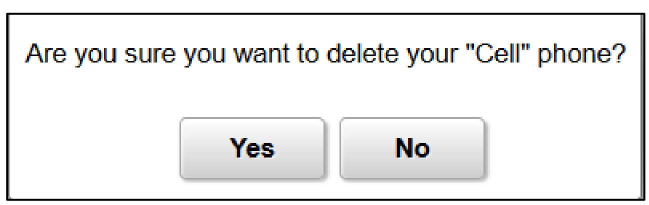


8. Change will now be listed.



9. To remove a phone number, **click >** and then **Delete**. Message will appear, select Yes or No.





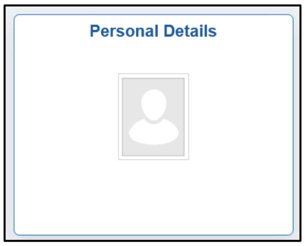
Contact Details - Adding/Updating Email Address(es)

There are 2 places where your email address is entered:

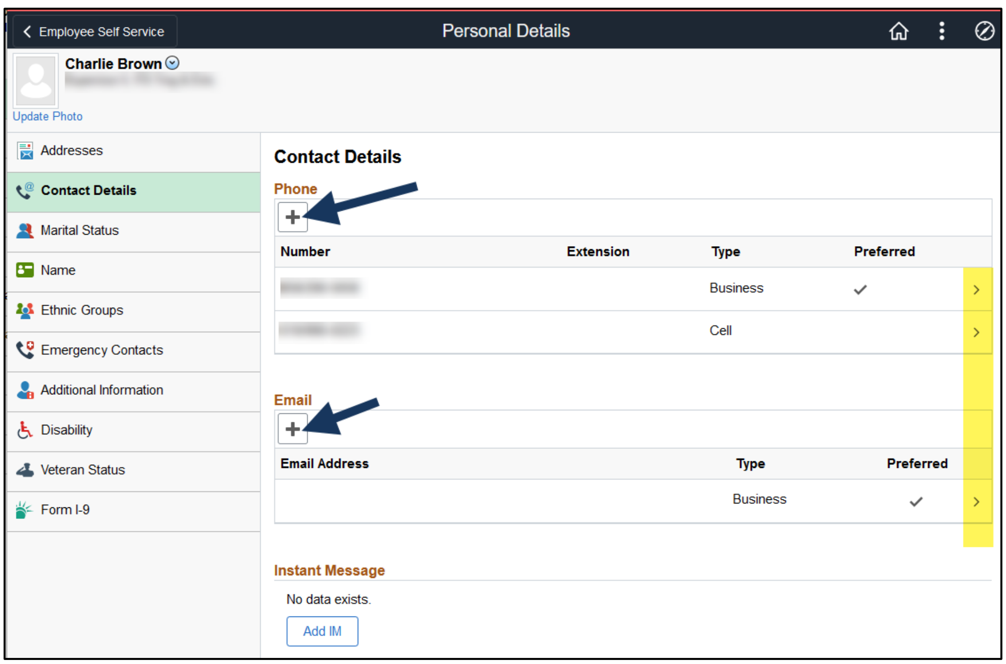
- **Personal Details** > Contact Details > Email
- NavBar > **My Profile** > Email (this email needs to be in place for ESS Direct Deposit change verification)

Personal Details

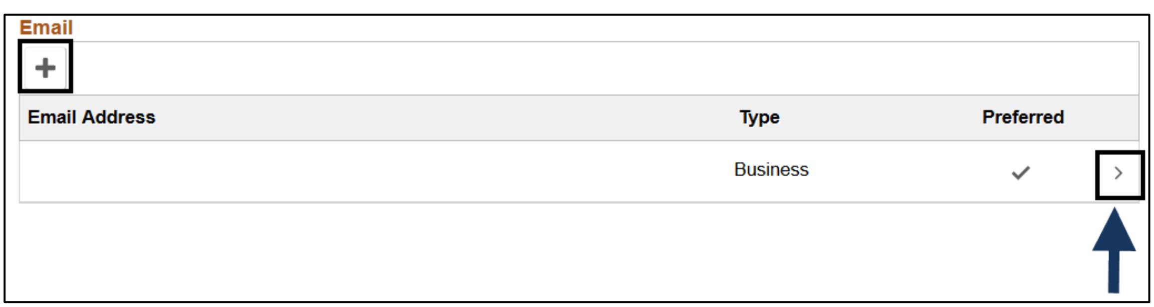
1. On the **Employee Self Service** Home page, click on the **Personal Details** tile.



2. Choose **Contact Details** to update your phone number(s).

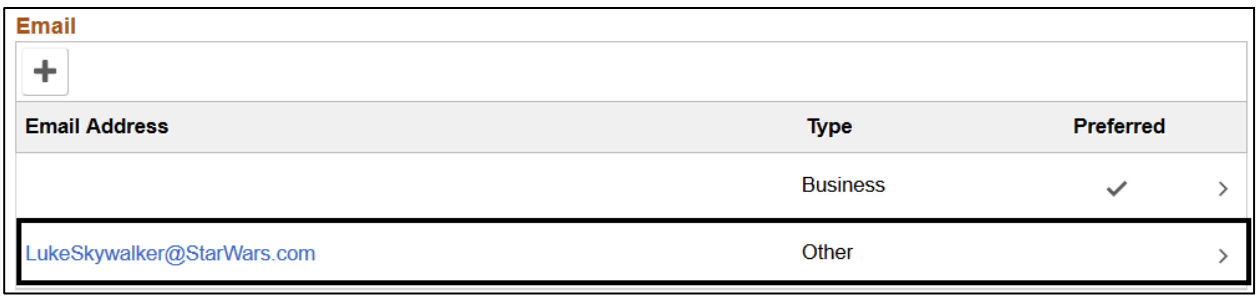


3. **Click + to Add** a new Email Address



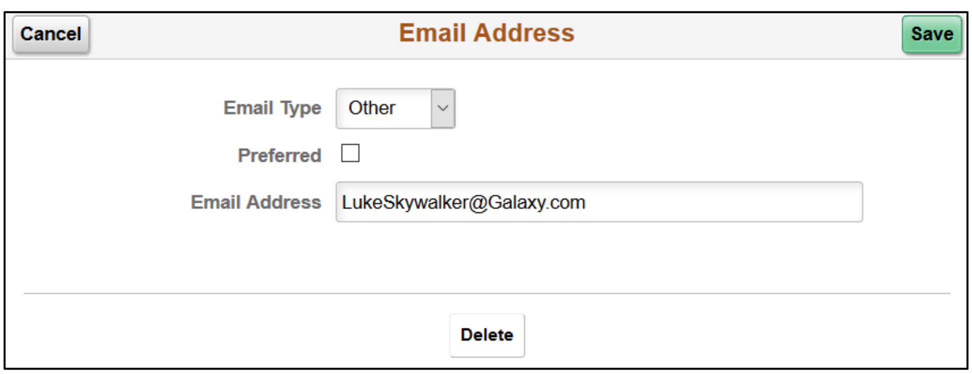
4. Add information:
   - **Email Type:** Campus, Dormitory, Home, Other (Business cannot be entered by employee)
   - **Preferred**: Check box if this is your preferred form of contact
   - **Email Address:** Enter email address

5. Click **Save** when finished.
6. New information will be listed

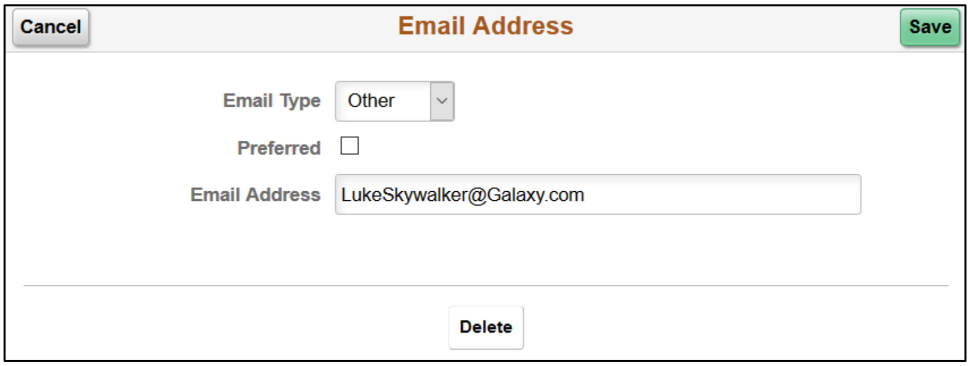


7. To **Edit** an email address, **click >**. Make changes, click **Save.**

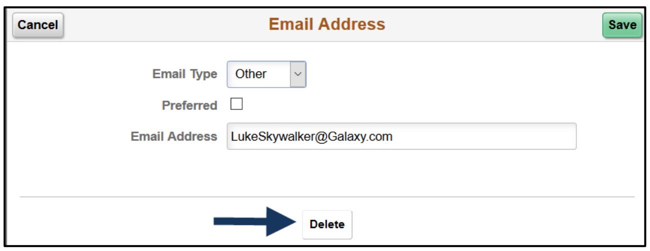
   NOTE: You cannot remove Preferred checkmark. You need to designate another email as Preferred. This will remove Preferred from the other email.

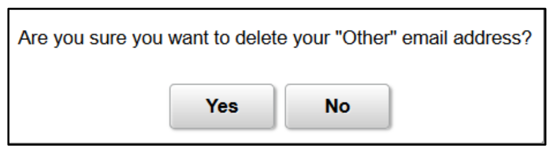


8. Change will now be listed.



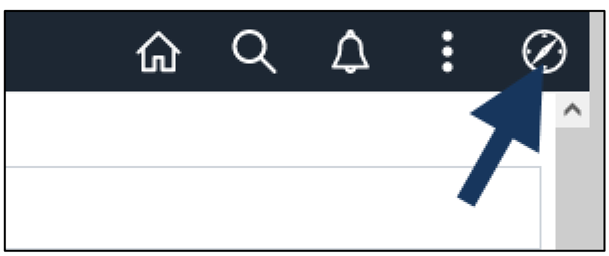
9. To remove an email, **click >** and then **Delete**. Message will appear, select Yes or No.

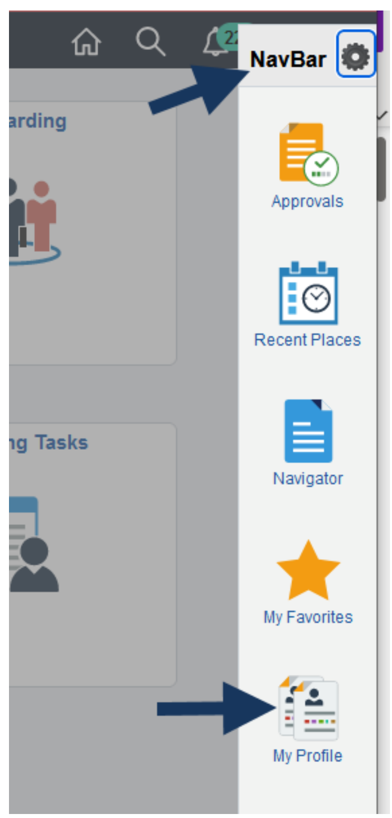




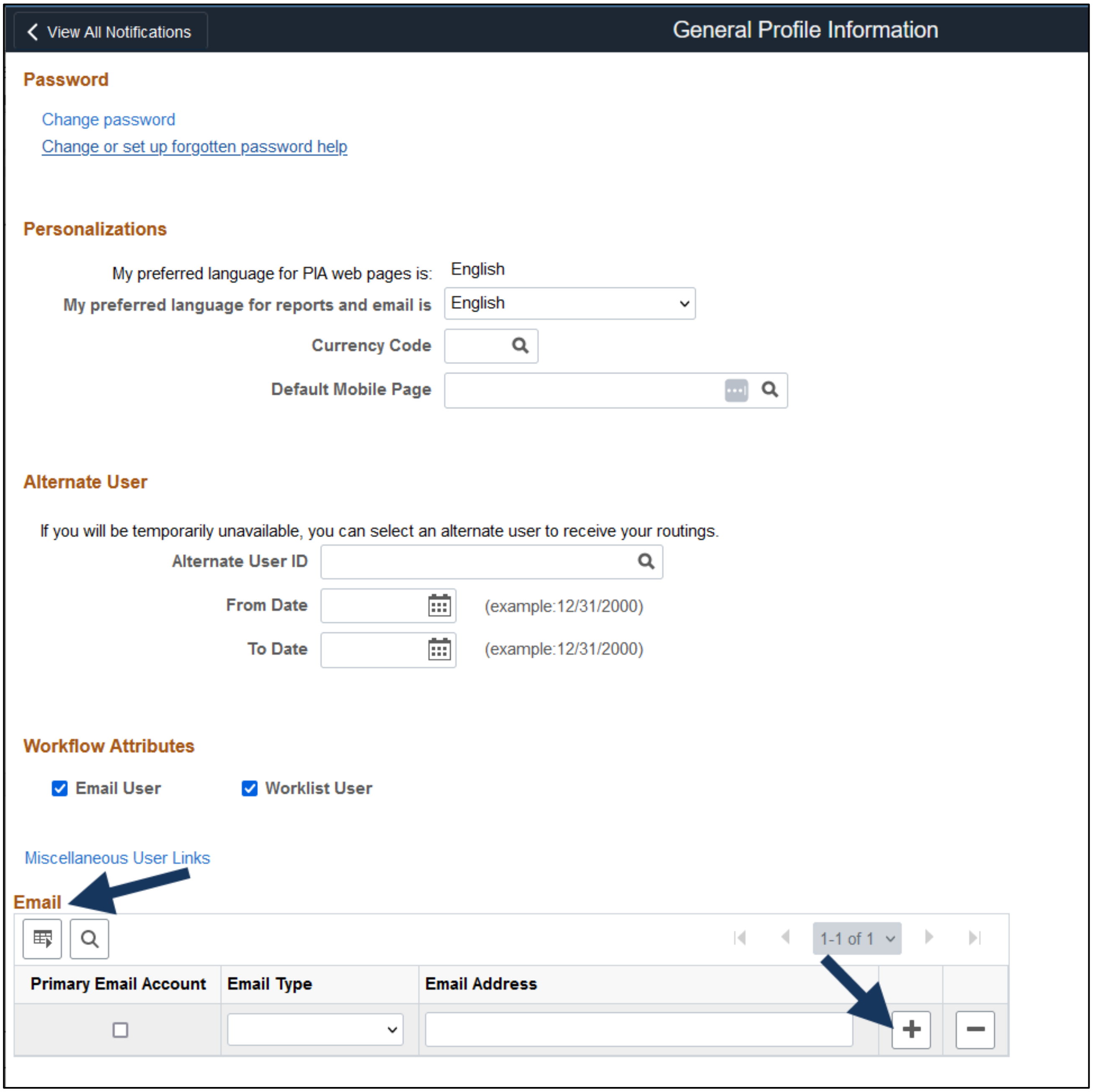
My Profile

1. Navigate to My Profile: NavBar > My Profile > Email

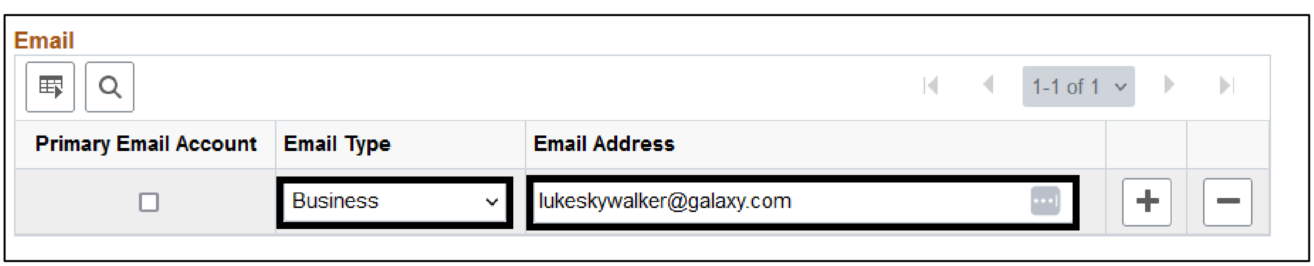




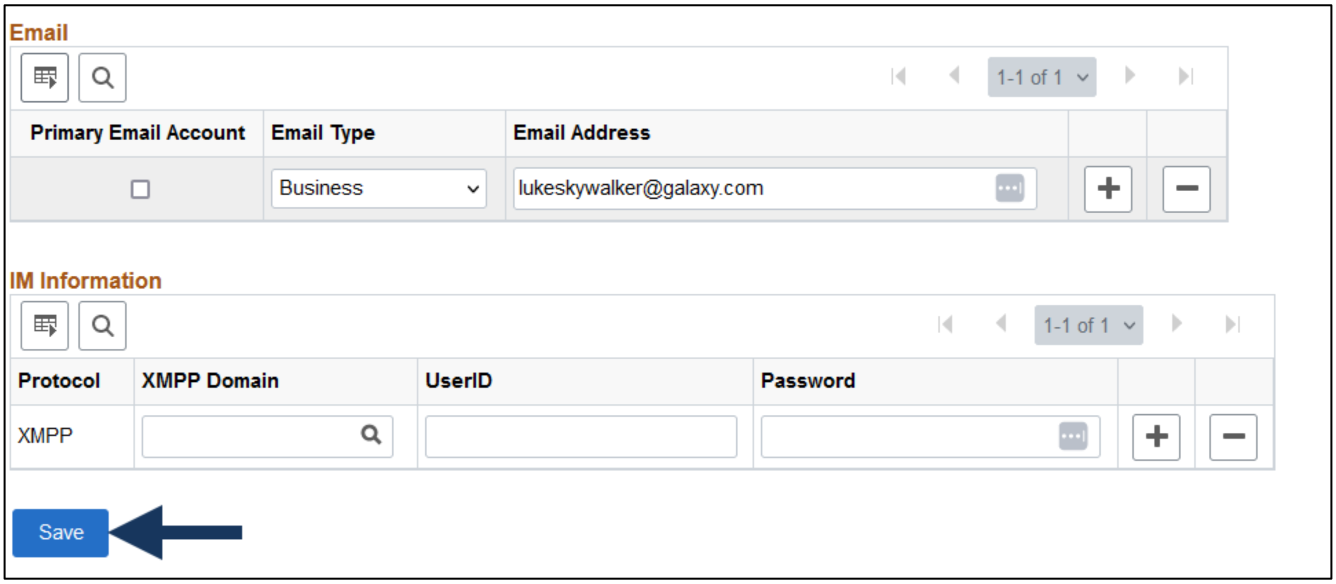
2. Click enter email information or click Add in the Email area



3. Select Email Type and enter Email Address.

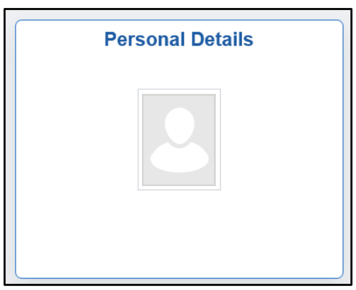


4. Click Save.

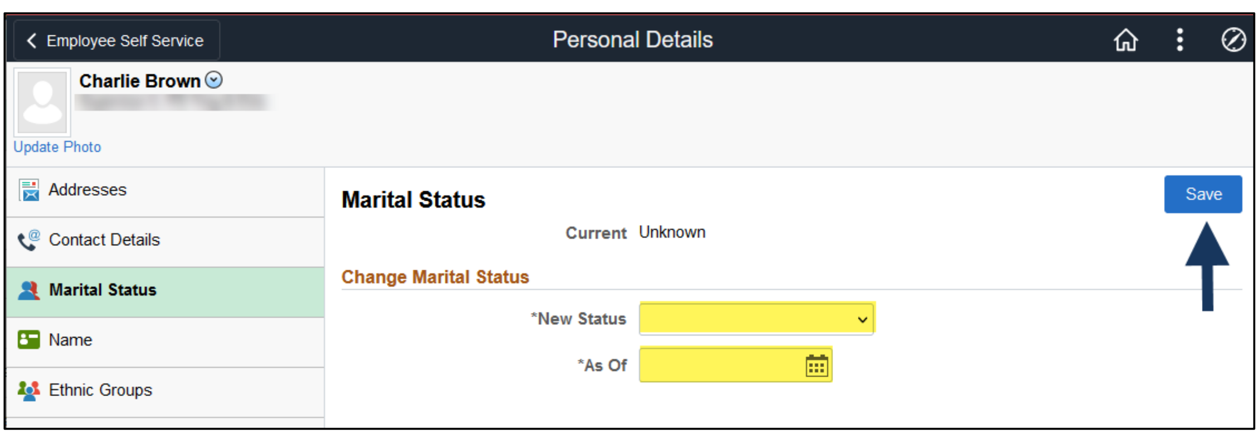


Marital Status

1. On the **Employee Self Service** Home page, click on the **Personal Details** tile.

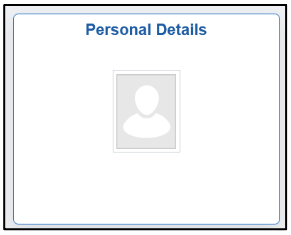


2. Choose **Marital Status** to update your Marital Status. Click **Save** when done.

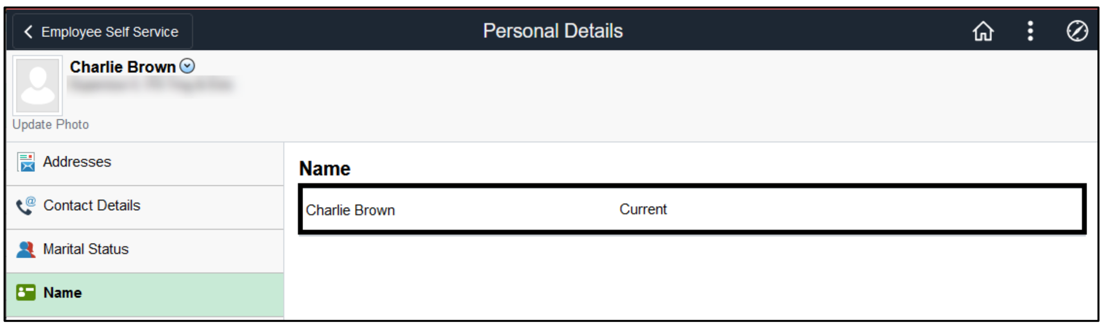


Name

1. On the **Employee Self Service** Home page, click on the **Personal Details** tile.

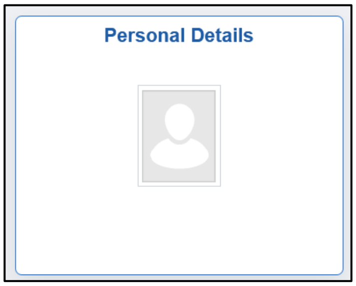


2. Choose **Name** see your name. No updates can be made. Contact your HR Department to make changes.

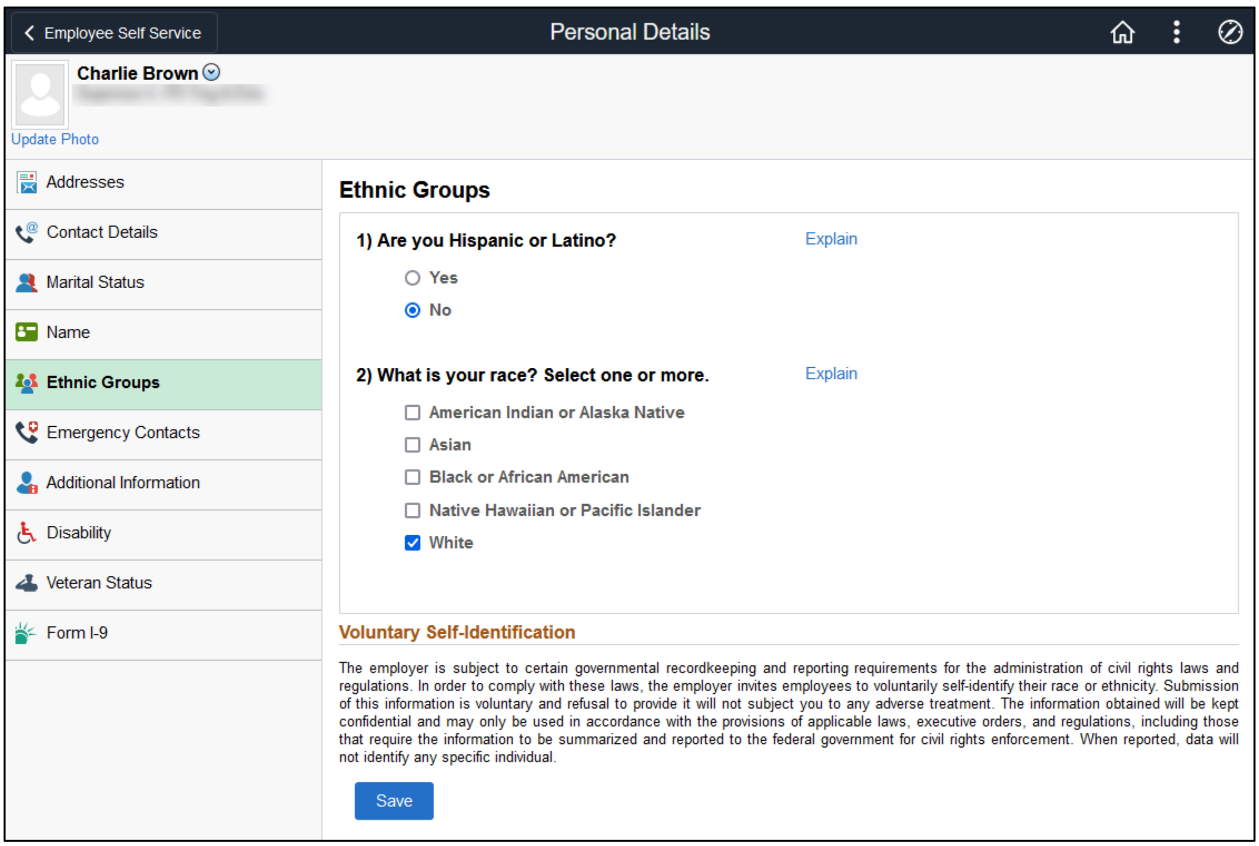


Ethnic Groups

1. On the **Employee Self Service** Home page, click on the **Personal Details** tile.

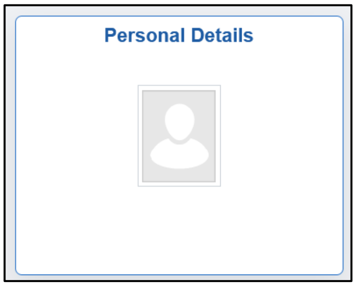


2. Choose **Ethnic Groups** to update ethnicity information.

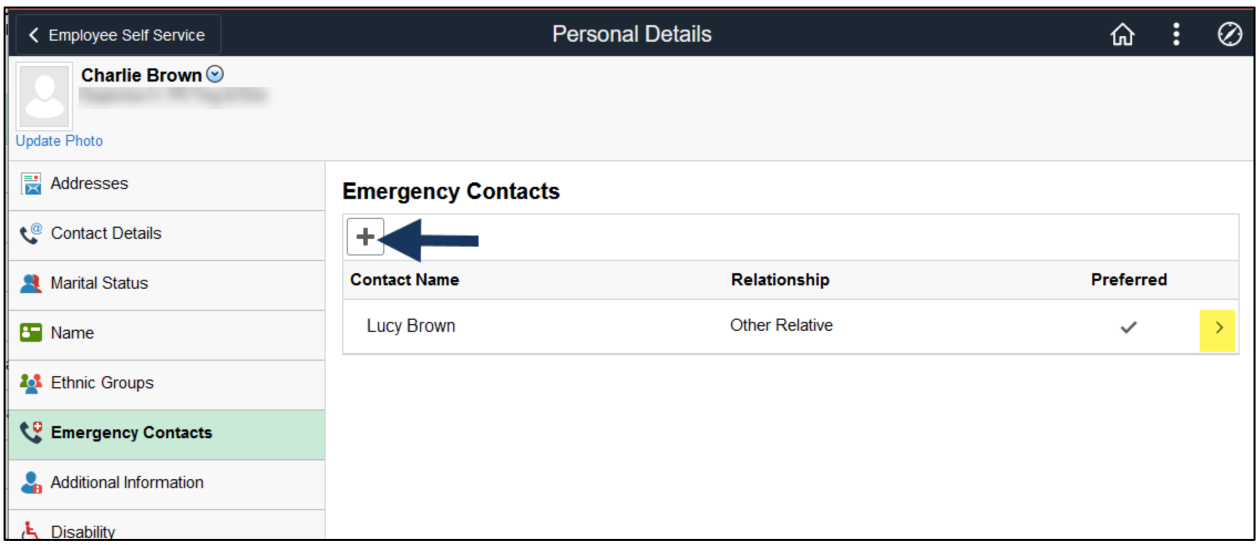


Emergency Contacts

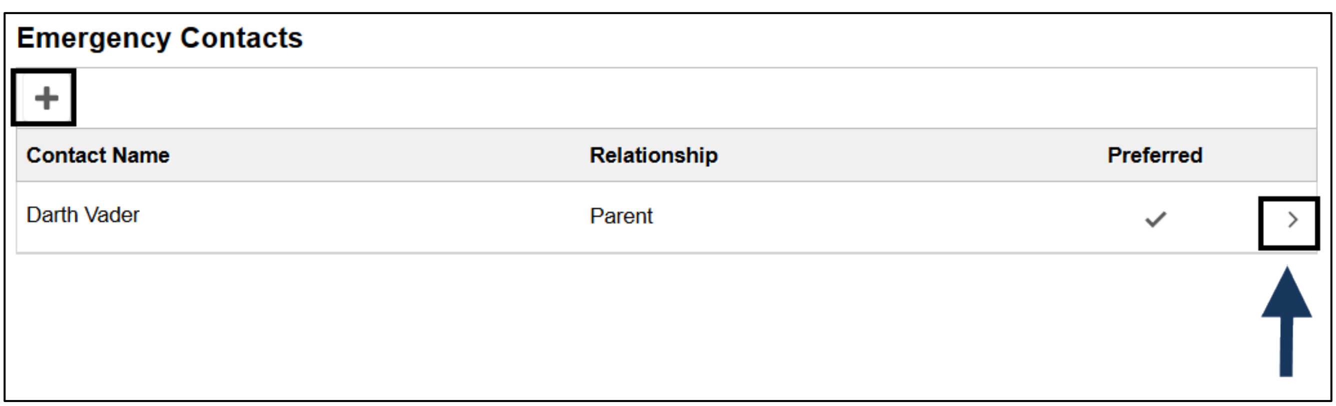
1. On the **Employee Self Service** Home page, click on the **Personal Details** tile.



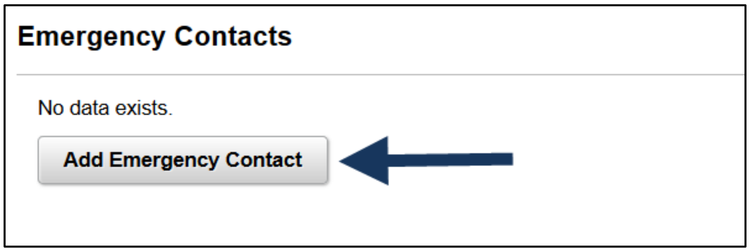
2. Choose **Emergency Contacts** to add or update.



3. **Click +** to **Add** a new emergency contact



- If no Emergency Contact is listed, click Add Emergency Contact.

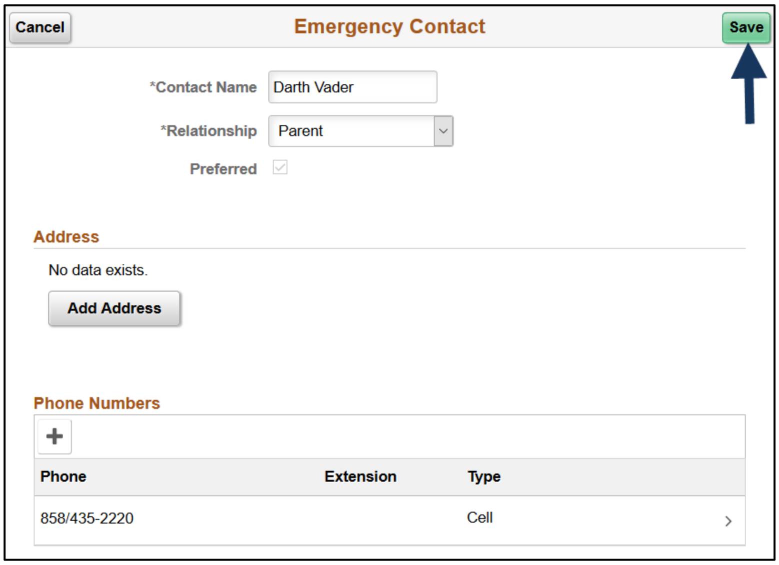


4. Add Contact Name and Relationship information:
   - **Contact Name:**
   - **Relationship:** There are multiple options for Relationship. Scroll down to see additional ones

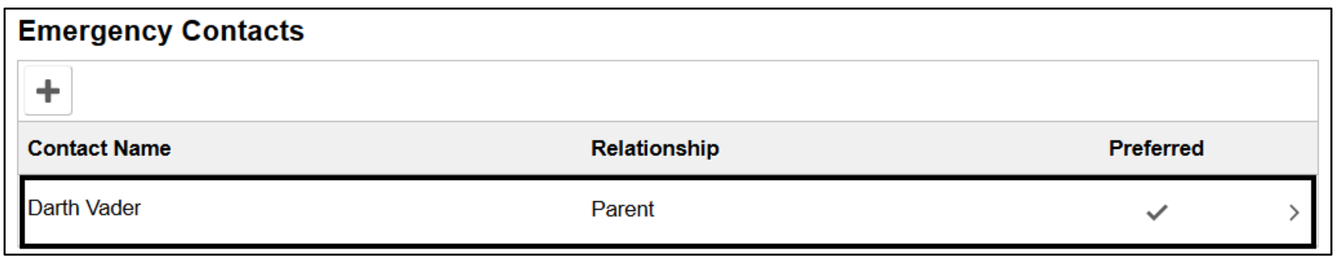
5. Click **Add Phone Number.** There is an option to check "Same as mine".

6. Click **Done** when finished.

7. Verify information. Click **Save.**

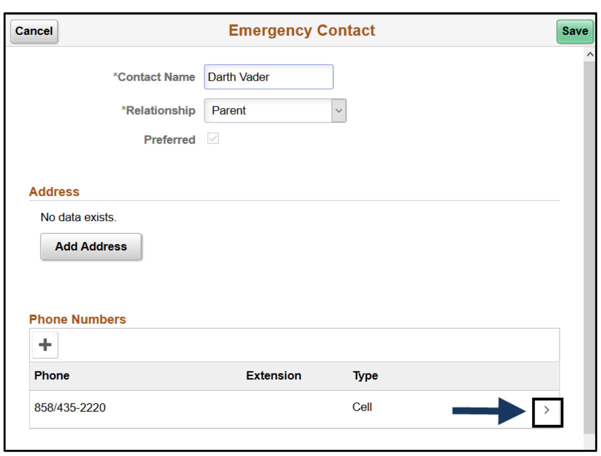


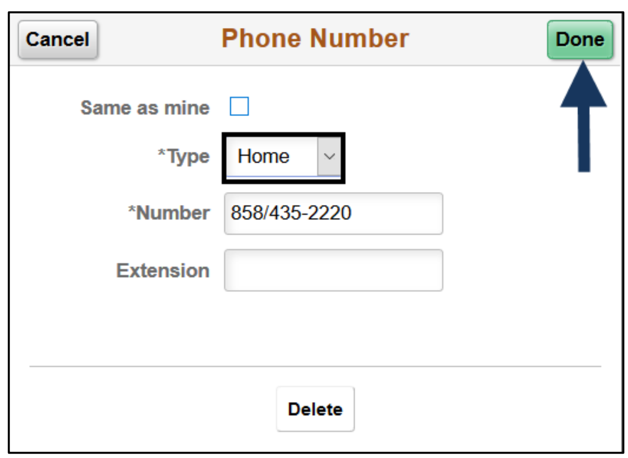
8. New information will be listed



9. To **Edit** emergency contacts, **click >**. Make changes to name. **Click >** by phone number to make changes**.** Click **Done.** Then click **Save**

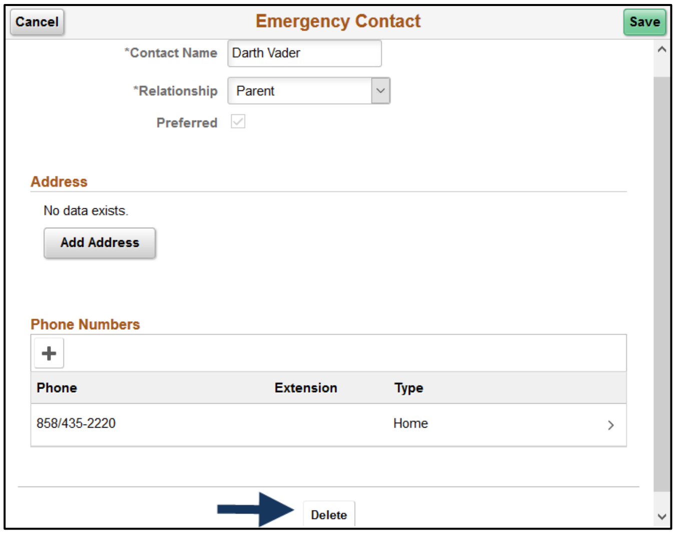
NOTE: You cannot remove Preferred checkmark. You need to designate another contact as Preferred. This will remove Preferred from the other contact.

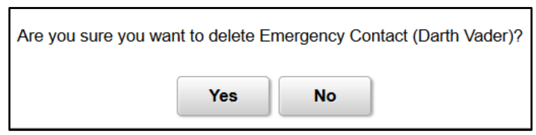




10. Change will now be listed.

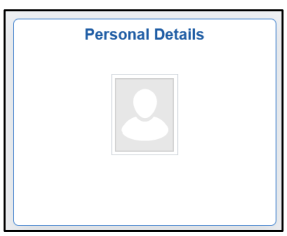
11. To remove an emergency contact, **click >** and then **Delete**. Message will appear, select Yes or No.



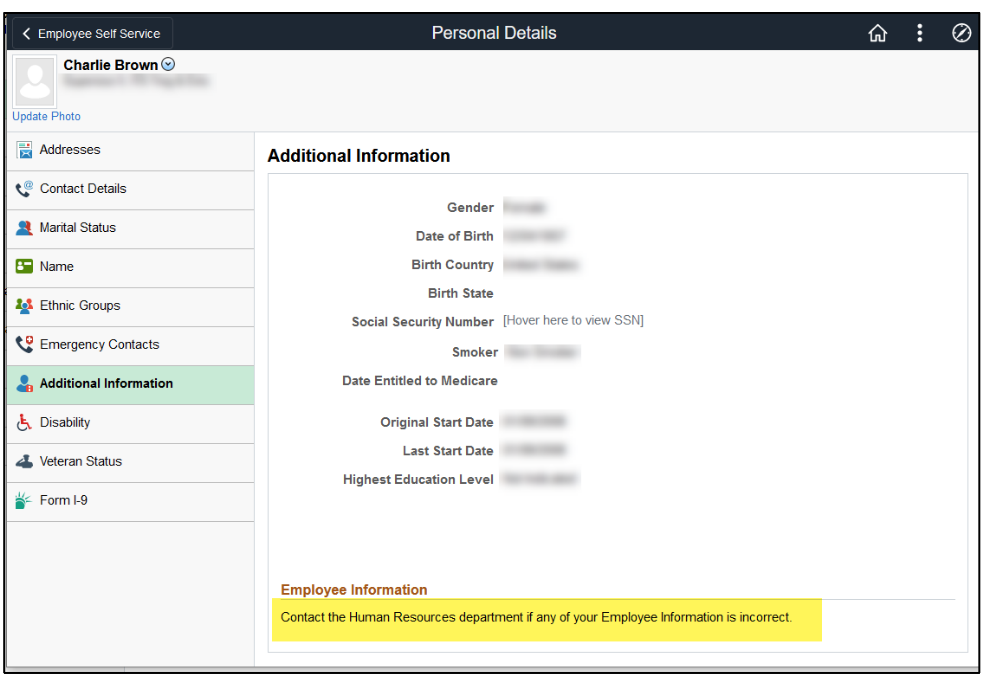


Additional Information

1. On the **Employee Self Service** Home page, click on the **Personal Details** tile.

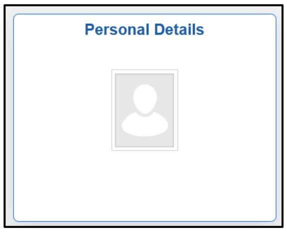


2. Choose **Additional Information** to review.. Contact your Human Resources Dept if corrects are needed.

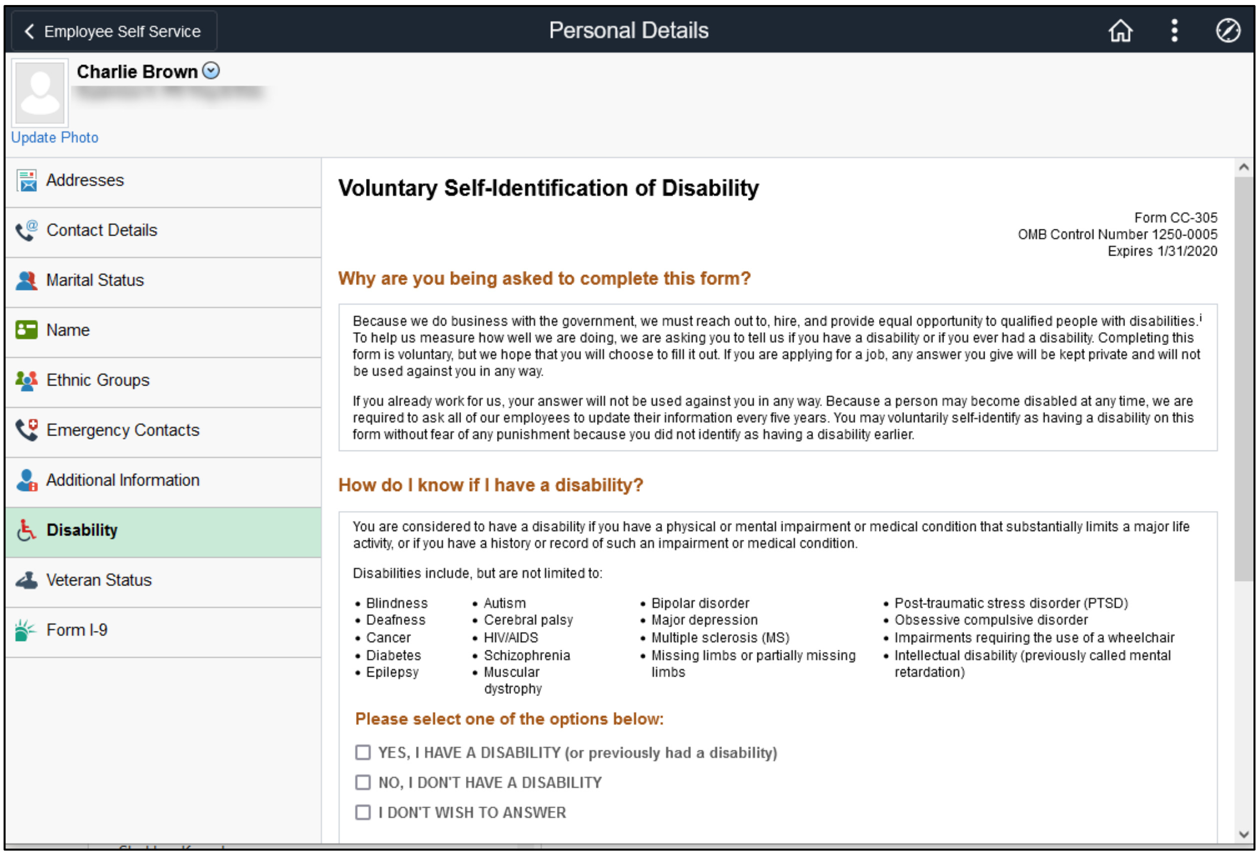


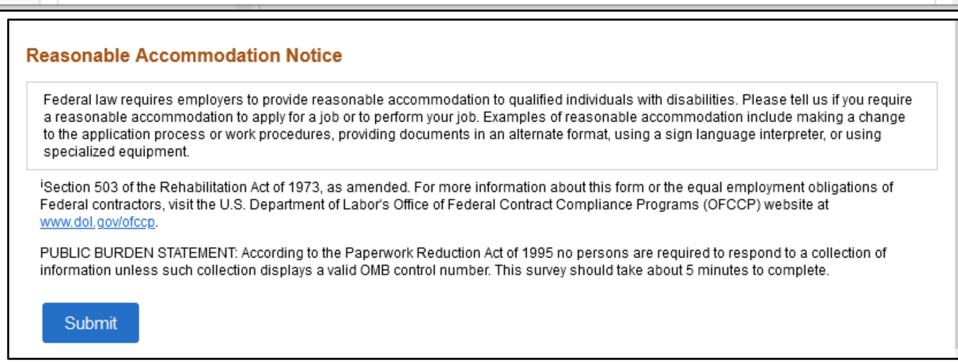
Disability

1. On the **Employee Self Service** Home page, click on the **Personal Details** tile.



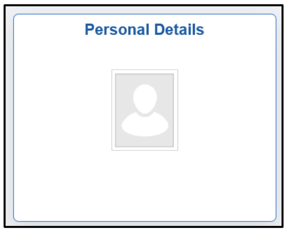
2. Choose **Disability** to enter Voluntary Self-Identification of Disability (page is optional).



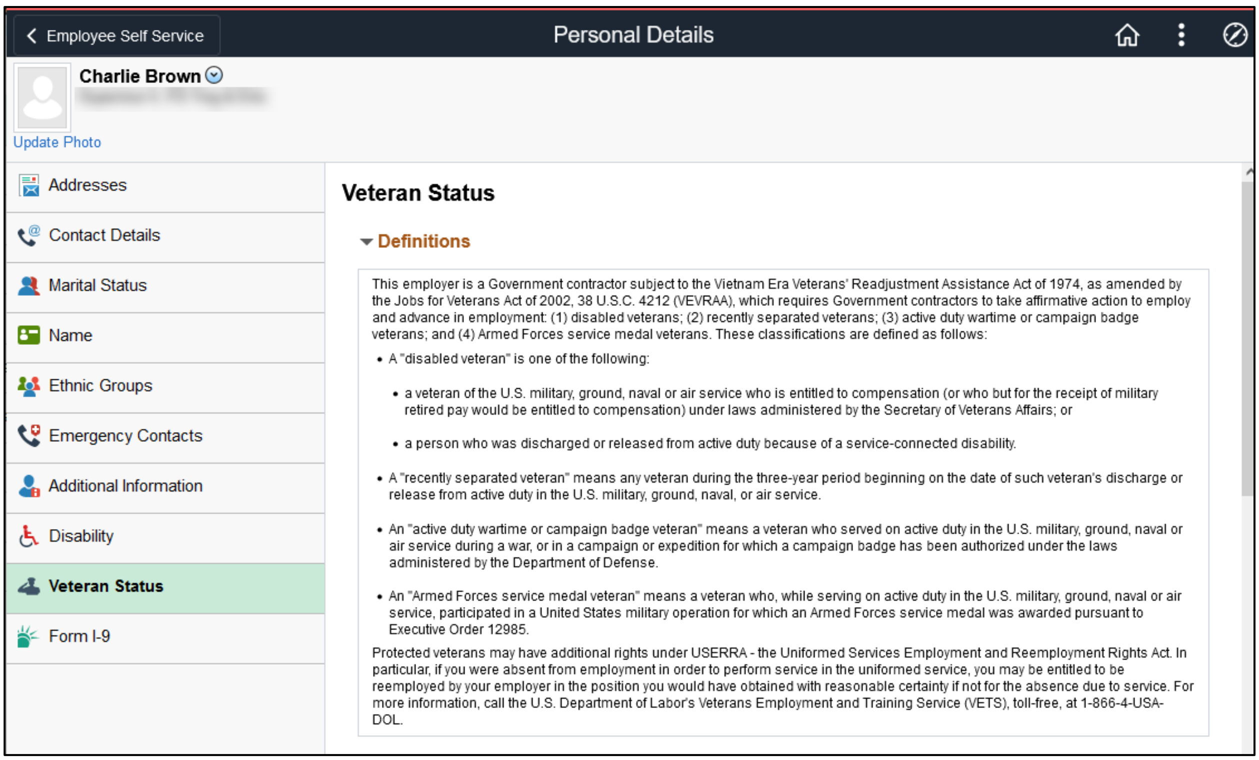


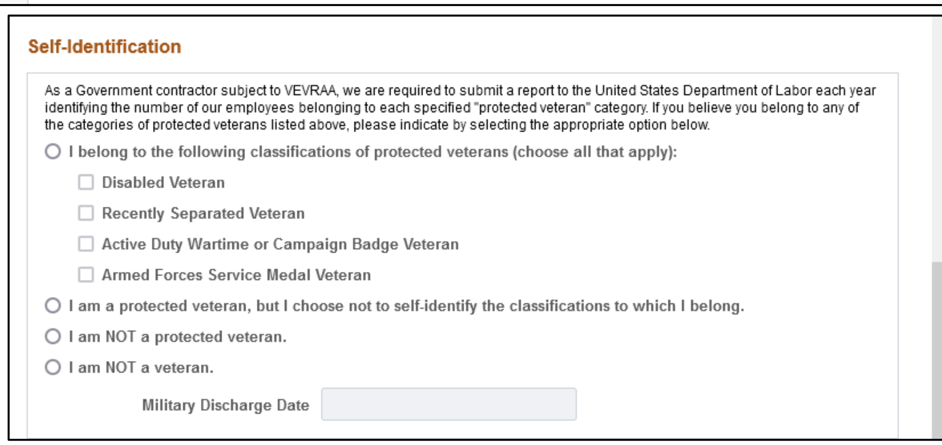
Veteran's Status

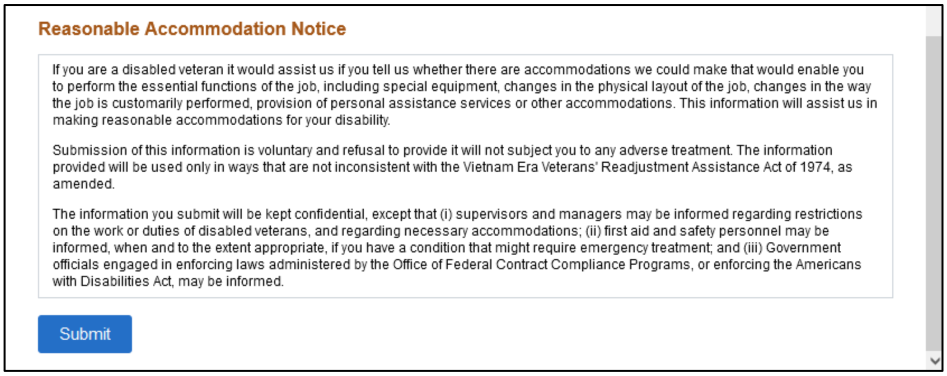
1. On the **Employee Self Service** Home page, click on the **Personal Details** tile.



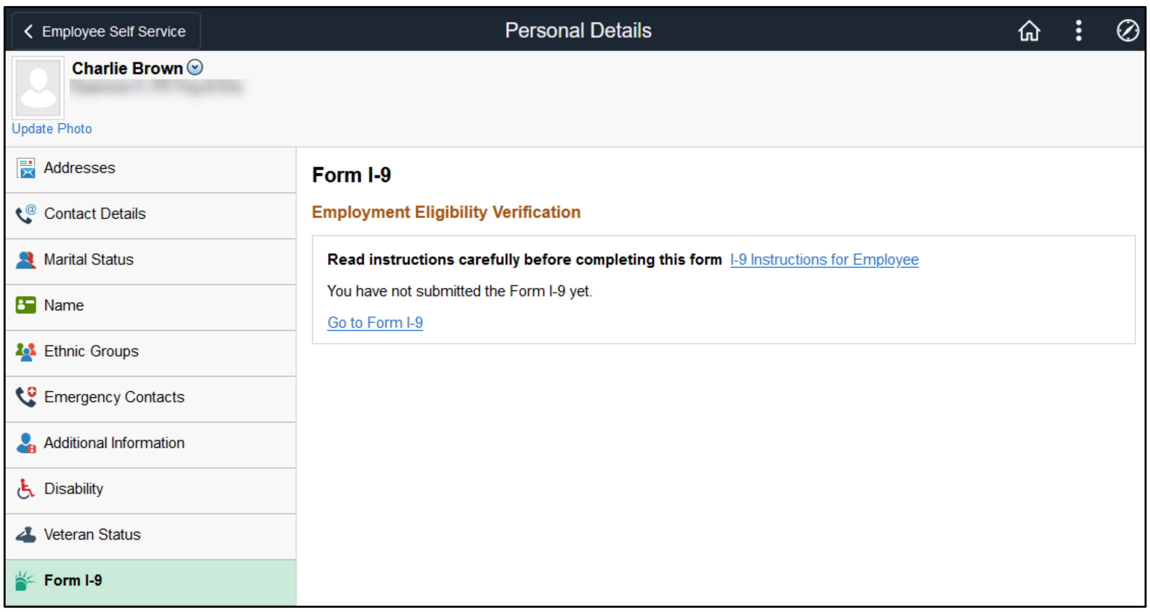
2. Choose **Veteran Status** to enter information.






Reasonable Accommodation Notice
If you are a disabled veteran it would assist us if you tell us whether there are accommodations we could make that would enable you to perform the essential functions of the job, including special equipment, changes in the physical layout of the job, changes in the way the job is customarily performed, provision of personal assistance services or other accommodations. This information will assist us in making reasonable accommodations for your disability.
Submission of this information is voluntary and refusal to provide it will not subject you to any adverse treatment. The information provided will be used only in ways that are not inconsistent with the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended.
The information you submit will be kept confidential, except that (i) supervisors and managers may be informed regarding restrictions on the work or duties of disabled veterans, and regarding necessary accommodations; (ii) first aid and safety personnel may be informed, when and to the extent appropriate, if you have a condition that might require emergency treatment; and (iii) Government officials engaged in enforcing laws administered by the Office of Federal Contract Compliance Programs, or enforcing the Americans with Disabilities Act, may be informed.
Submit

Form I-9


Employee Self Service
Personal Details
Charlie Brown
Update Photo
Addresses
Contact Details
Marital Status
Name
Ethnic Groups
Emergency Contacts
Additional Information
Disability
Veteran Status
Form I-9
Form I-9
Employment Eligibility Verification
Read instructions carefully before completing this form I-9 Instructions for Employee
You have not submitted the Form I-9 yet.
Go to Form I-9

Viewing Benefits Information

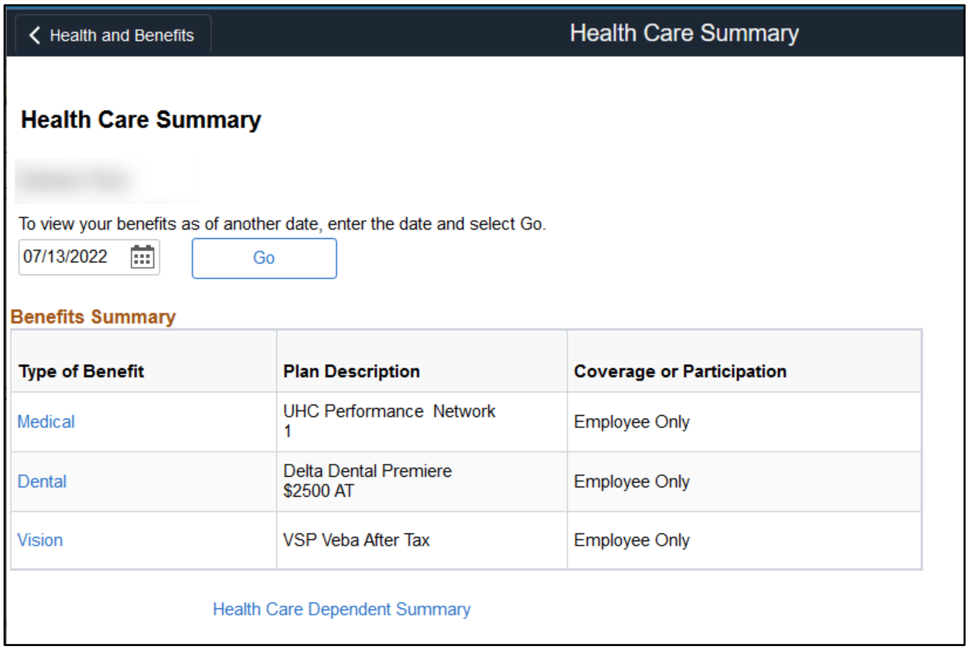
If your district tracks benefits in PeopleSoft, you can use these tiles to access your information. You cannot make changes from these tiles.

- **Health Care Summary:** View your benefits. This page includes the type of benefit (like Medical, Dental, Vision, for example), the plan description, and coverage or participation. You can click the benefit type for additional information, including the plan name, plan provider, and covered dependents.
- **Savings Summary:** View the plans available and your monthly contribution for each plan if you are enrolled in more than one plan.
- **Savings Contribution Summary**: View the type of benefit and whether the contributions are flat amounts or percentages.
- **Savings Beneficiary Summary:**
- **CalPERS and CalSTRS**: Links are provided to their websites

Health Care Summary

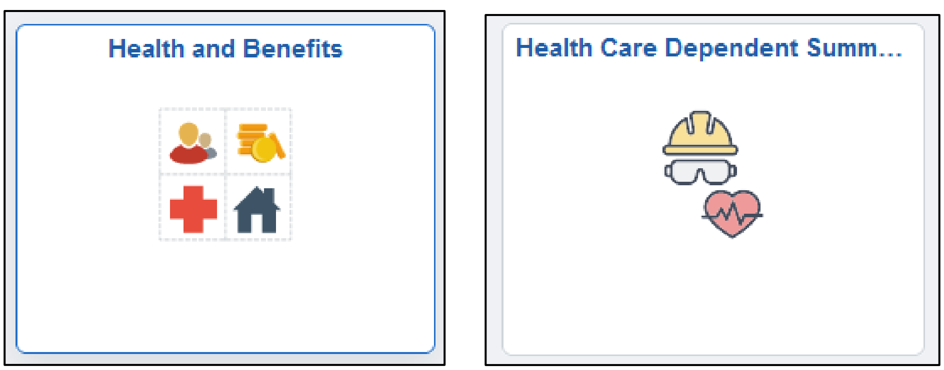
1. Click on **Health and Benefits** tile then **HealthCare Summary** tile.

2. Your Benefits will be listed as of date you select.

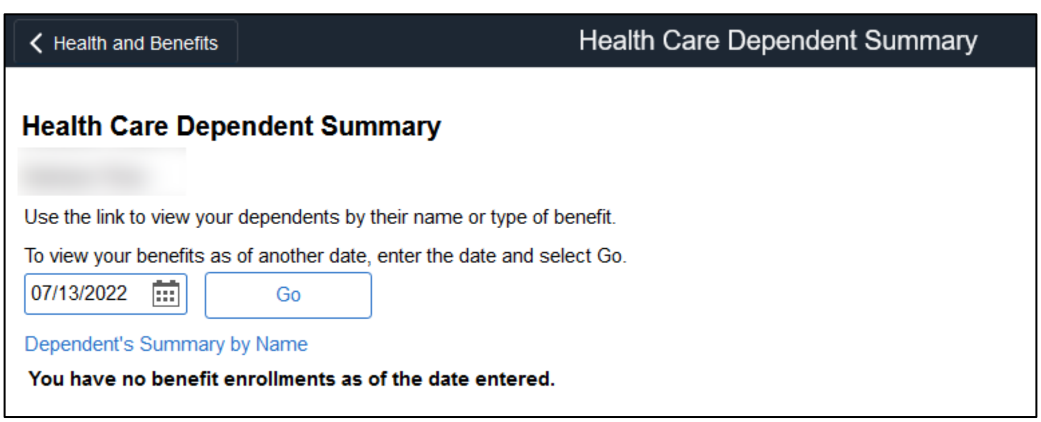


Health Care Dependent Summary

1. Click on **Health and Benefits** tile then **HealthCare Dependent Summary** tile.



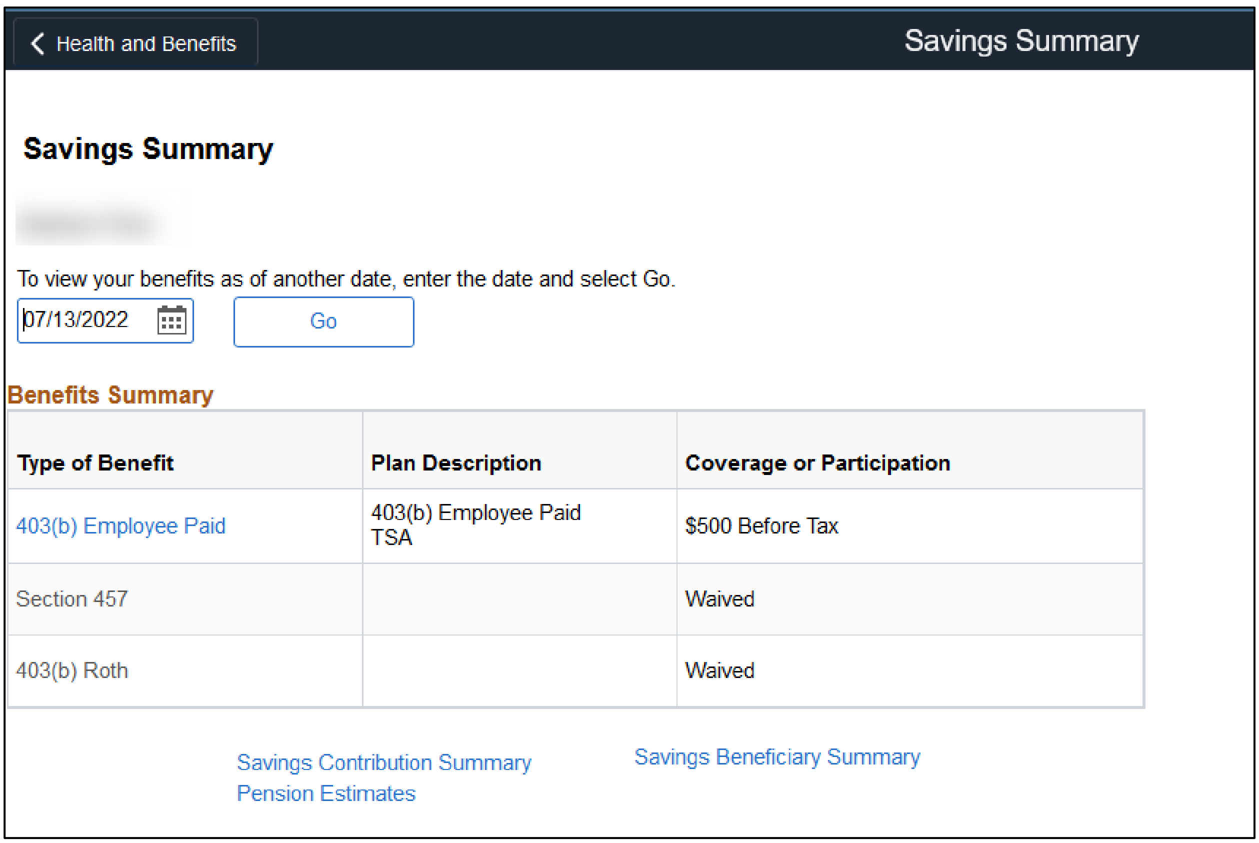
2. Your Dependents will be listed as of date you select. If you have none it will be blank.



Savings Summary

1. Click on **Health and Benefits** tile then **Savings Summary** tile.

2. Your Savings Plans will be listed as of date you select. If you have none it will be blank.



Savings Summary

To view your benefits as of another date, enter the date and select Go.

07/13/2022 Go

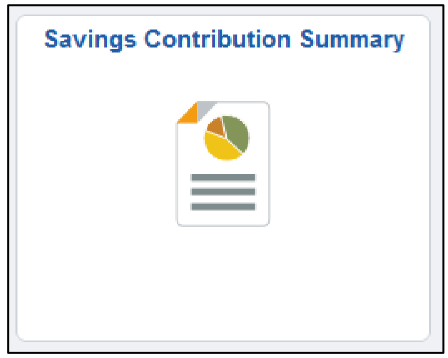
Benefits Summary

Type of Benefit	Plan Description	Coverage or Participation
403(b) Employee Paid	403(b) Employee Paid TSA	$500 Before Tax
Section 457		Waived
403(b) Roth		Waived

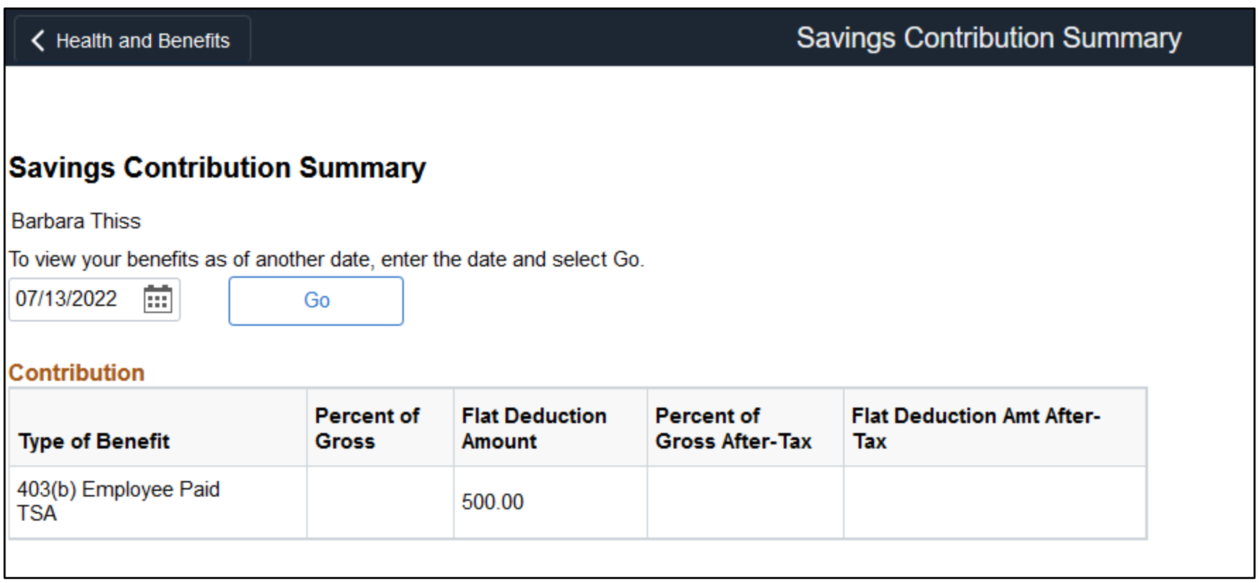
Savings Contribution Summary
Pension Estimates
Savings Beneficiary Summary

Savings Contribution Summary

1. Click on **Health and Benefits** tile then **Savings Contribution Summary** tile.



2. Savings Contribution details will be listed as of date you select. If you have none it will be blank.



Savings Contribution Summary

Barbara Thiss

To view your benefits as of another date, enter the date and select Go.

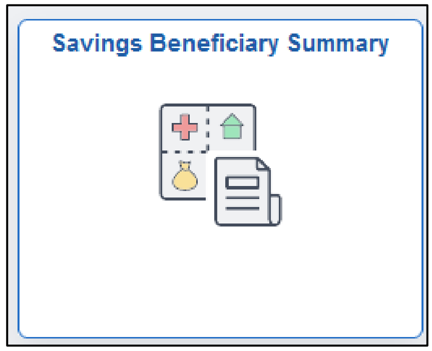
07/13/2022 Go

Contribution

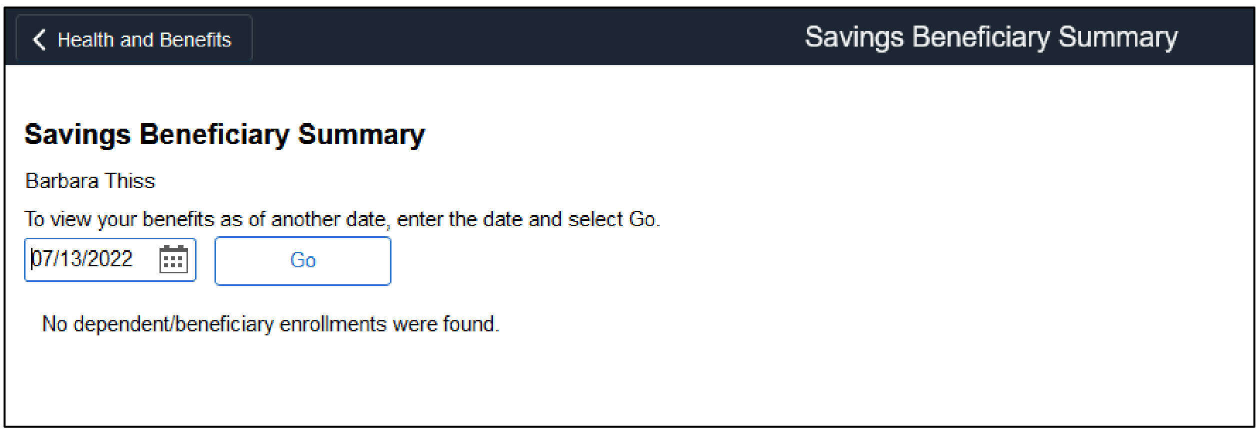
Type of Benefit	Percent of Gross	Flat Deduction Amount	Percent of Gross After-Tax	Flat Deduction Amt After-Tax
403(b) Employee Paid TSA		500.00		

Savings Beneficiary Summary

1. Click on **Health and Benefits** tile then **Savings Beneficiary Summary** tile.



2. Savings Beneficiary details will be listed as of date you select. If you have none, it will be blank.



CalPERS and CalSTRS links to their websites

1. Click on **Health and Benefits** tile then either CalPERS or CalSTRS tile.

2. These tiles will take you to their websites where you can set up access and log in.

Part IV: Time and Absence

Overview of Absence Requests

This section is for districts that are set up to have their employees enter their own absences.

Screens

There are three Absence screens you can use:

Screen	Enter an Absence Request	Edit a Saved Absence Request	Cancel an Absence Request	View Absence History	Forecast/ View Balances
1. Absence Request Screen	●				●
2. Absence Request History Screen		●	●	●	
3. Absence Balances Screen					●

FAQs

Q: How do I submit an absence request?
A: For full directions with screenshots, see the directions that begin on p.58.

Q: How far into the future can I submit an absence request?
A: You can submit absence requests through the end of this fiscal year.

Q: What drives the Absence Names (Bereavement, Jury Duty, Vacation, etc.) that I can select?
A: The pay group you are in, set up by your HR Department, drives the absence names you see on the screen.

Q: How does my manager know when to approve my absence request? How do I know when it was approved?
A: When you submit your absence request, an email message is sent to your manager to let him/her know that a request needs approval. When your manager takes action on your request—by either approving, denying, or pushing back—you will receive an email message.

Q: Can I view my up-to-date leave balances (not payroll by payroll)?
A: Yes. The current balance is as of last payroll. The current balances do not reflect absence requests not processed by payroll. If you want to see your up-to-date balance, forecast using today's date (or another future date).

Q: Will absence balances display on the PeopleSoft paystub?
A: Yes. You will see absence balances on the bottom-left of the paystub.

Q: How do you cancel an absence request?
A: Go to the **Absence Request History** screen. Click the **Cancel** button next to the request that you want to cancel. The request will open. Scroll to the bottom and click **Cancel Absence**.

Q: When does the system allow me to *edit* or *cancel* a request?

A: This grid shows the scenarios when you can and cannot edit or cancel a request.

Scenario	Can Edit	Can Cancel
Saved, future date	●	●
Saved, past date	●	●
Submitted but not approved yet, future date		●
Submitted but not approved yet, past date		
Submitted and approved, future date		●
Submitted and approved, past date		
Pushed back or denied, future date	●	●
Pushed back or denied, past date	●	●

- Edit: You can edit a request when it is saved (both future and past dates) or returned to you by your manager (pushed back or denied, both future and past dates).
- Cancel: You can cancel a request when it is saved (both future and past dates), submitted and not yet approved (future date), submitted and approved (future date), or returned to you by your manager (pushed back or denied, both future and past dates).

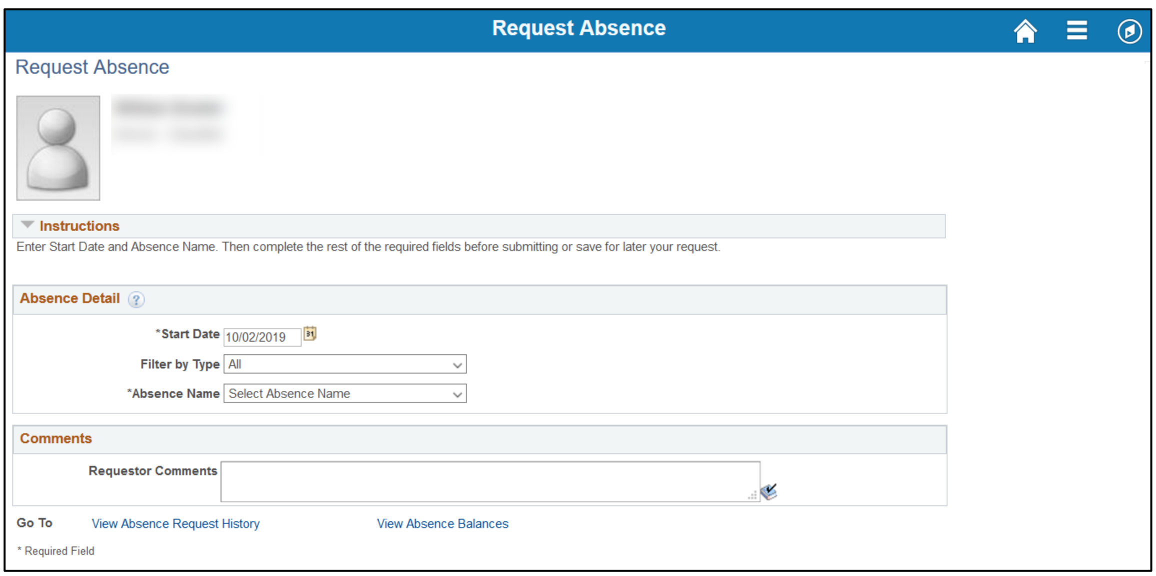
Q: If I cancel an absence request, when will the debited hours (those taken away because of the request) be returned to my balance?

A: Your debited hours will be returned the next day. A nightly process needs to run to update the hours `in your absence balances.

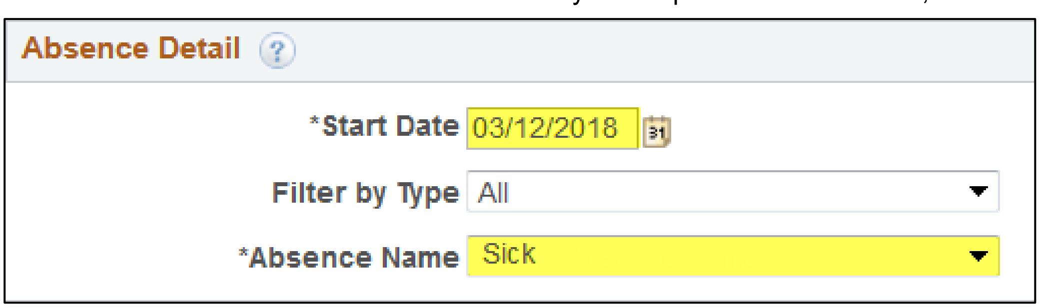
Entering Absence Request Screen

1. Click on the **Time and Absence** tile, then the **Absence Request** tile.

2. *Request Absence* screen opens. To enter your absence, **refer to How to Request Absence on p.** Error! Bookmark not defined.**.**

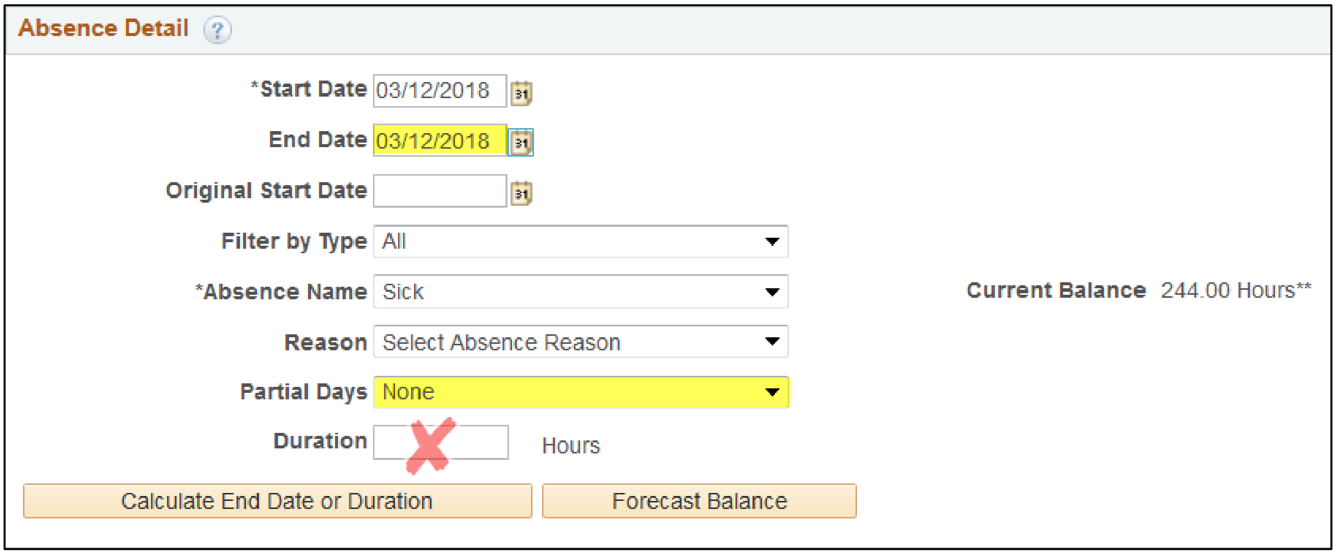


3. Enter the **Start Date** and **Absence Name**. After you complete these two fields, additional fields will appear.



- **Start Date**: Enter the first day of the absence. Example: 03/12/2018.
- **Absence Name**: Select the type of absence. The options available for selection are tied to the way your position is set up in HR. Examples: Sick, Vacation, Personal Business, Personal Necessity, Jury Duty.

4. Enter the **End Date**. If necessary, enter **Reason** and **Partial Days**.



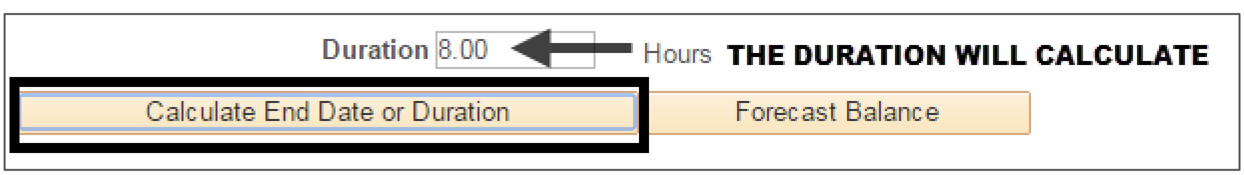
- **End Date**: Enter the last day of the absence. If this is one day only, this should be the same as the Start Date. Examples: 03/12/2018 - 03/12/2018 (one day), 03/12/2018 - 03/13/2018 (two days)

IMPORTANT NOTE REGARDING START AND END DATES

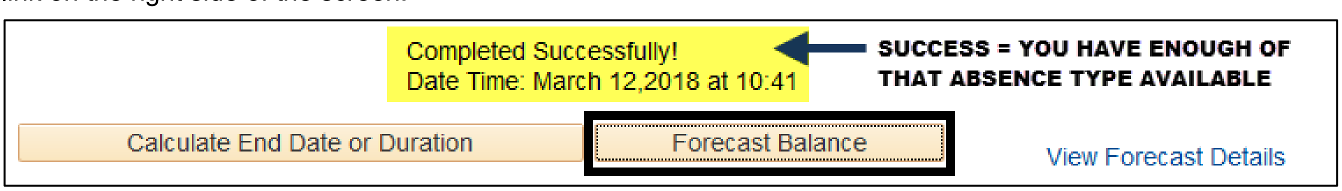
Do ***NOT*** enter an absence request with a Start Date and End Date that cross over months or fiscal years. For example, a sick absence for 3/30 - 4/3 will need 2 entries, one for 3/30 – 3/31 and one for 4/1 - 4/3. A vacation absence for 6/29 - 7/3 will need to be entered as 6/29 - 6/30 and 7/1 - 7/3.

- **Reason**: If necessary and/or required by your district, select a Reason.
- Partial Days: Partial days are used when you are not taking a full day (like 2 hours or 4 hours, for example). See samples on p.14 for use of partial days.
- Duration: Don't enter the duration. This is automatically calculated in Step 5.
- **Current Balance:** Your current balance will be displayed on the right side of the screen. The current balances do not reflect absence requests not processed by payroll. This is why you forecast in Step 5.

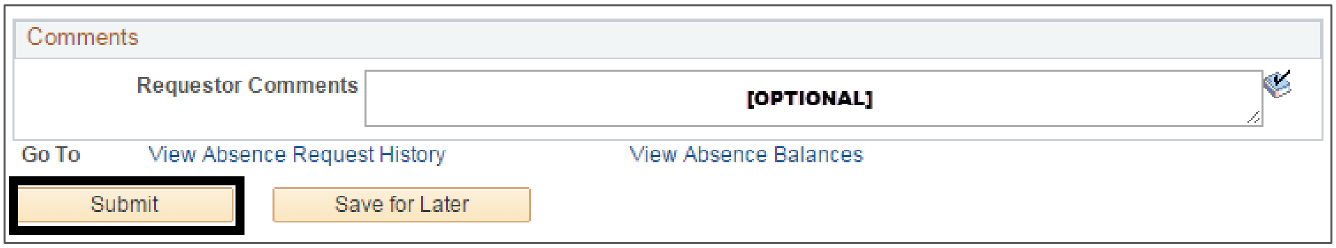
5. Click **Calculate End Date or Duration** (orange button). This populates the **Duration** in hours.
NOTE: If the duration appears incorrect, contact HR to fix your job data record.



6. Click **Forecast Balance** (orange button). You should see a message that says, "*Completed Successfully!*" If not, you do not have enough of that absence type available. For details, click the **View Forecast Details** link on the right side of the screen.

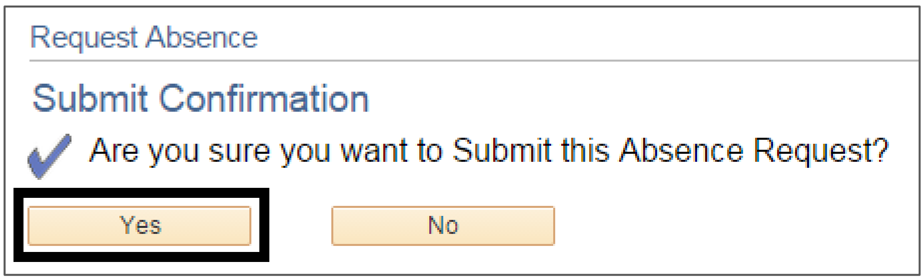


7. If desired, enter comments. Click **Submit**.



NOTE: If you click **Save for Later** it doesn't go anywhere until you submit it; if you save you will need to edit and submit it from the Absence Request History screen.

8. A confirmation window will appear. Click **Yes**.



9. Click **OK**.

The absence request is now submitted, which sends an email message to your manager and also adds the request to his/her worklist. If desired, click **Home** to return to the home screen

IMPORTANT! There are rules for when you can edit and/or cancel an absence request. See *FAQs* in the *Overview of Absence Requests* section for more information. See *Edit a Saved, Denied, or Pushed Back Absence Request* and *Cancel an Absence Request* in the *Overview of Absence Requests* section for directions.

Partial Days

PeopleSoft allows you to enter absences requests in partial days. If you need to request a partial day(s) for an absence, you will use the **Partial Days** dropdown menu and the **Hours** field.

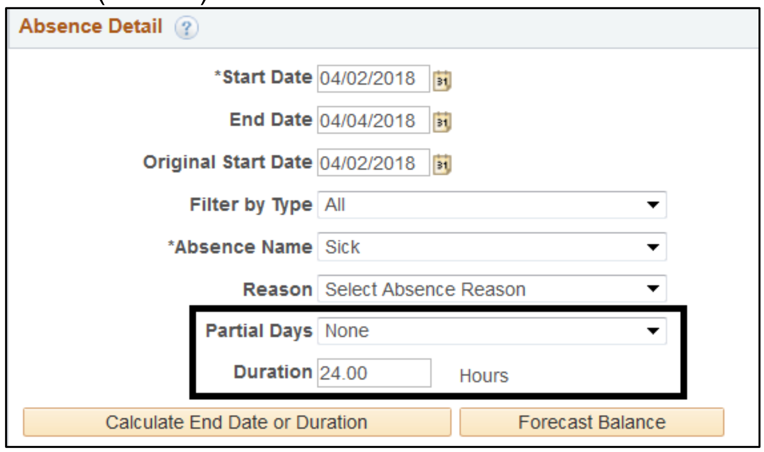
<table>
<tr><th>If you need to request…</th><th>Enter it like this…</th></tr>
<tr><td>

Full days off, no partials (MOST CIRCUMSTANCES)

Example: Hank's regular work schedule is 8 hours per day. He is taking 3 full days (24 hours) of sick leave.

</td><td>

NONE (Default)



F. **Partial Days** = *None* (Default)

G. **Duration** = Do nothing. It will be calculated by multiplying the employee's work schedule (8) x the number of days taken (3) = 24 hrs.

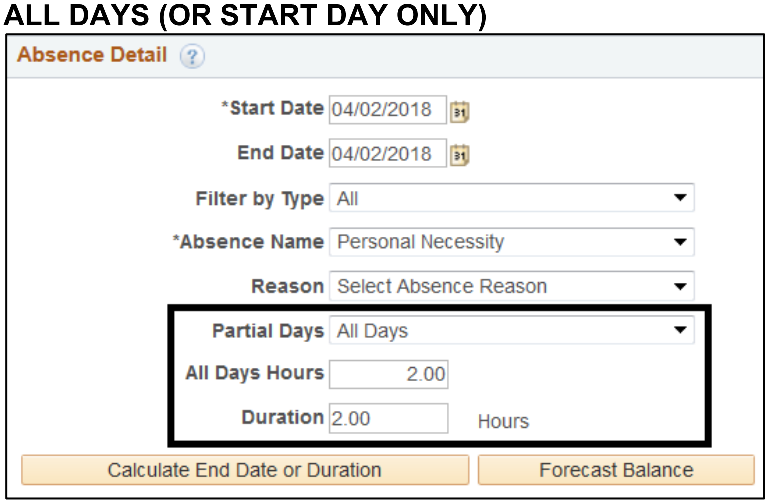
</td></tr>
<tr><td>

A few hours off during one work day (MANY CIRCUMSTANCES)

Example: Hank's regular work schedule is 8 hours per day. He is taking 2 hours of personal necessity.

</td><td>

ALL DAYS (OR START DAY ONLY)

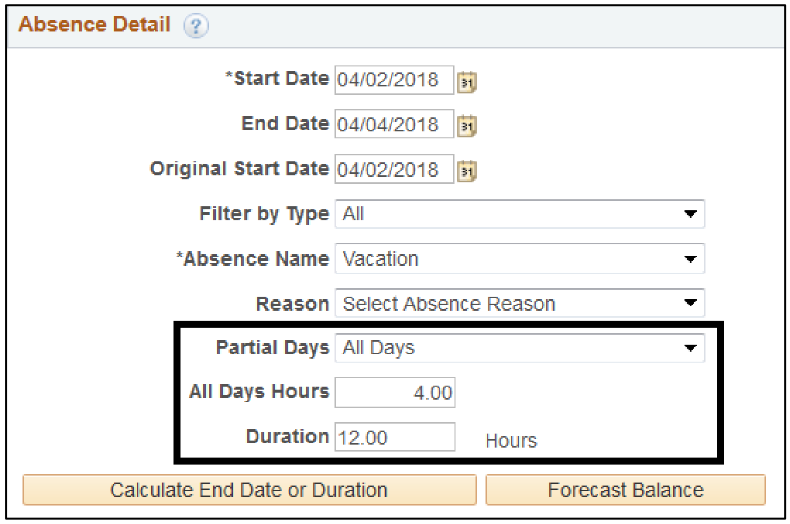
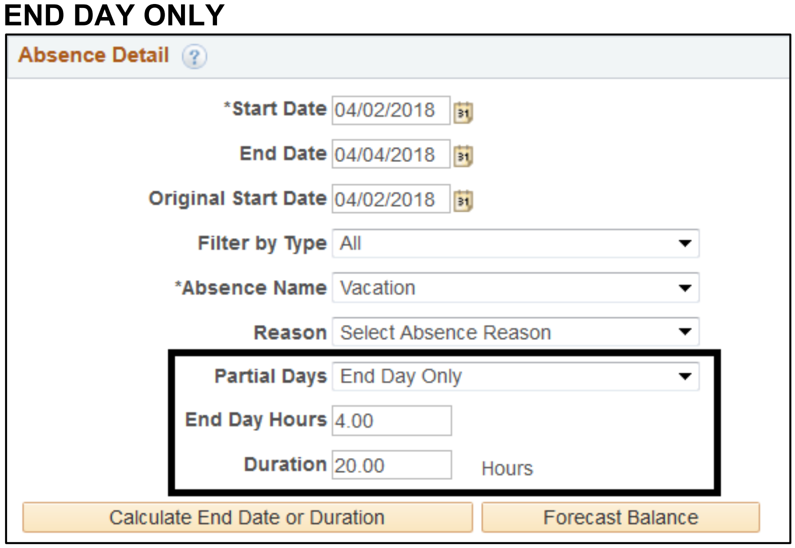


H. **Partial Days** = *All Days* (or you can select *Start Day Only* – when applied to one day, both do the same thing)

I. All Days Hours = 2.0

J. **Duration** = Do nothing. It will be calculated by taking the All Days Hours (2) x the number of days taken (1) = 2 hrs.

</td></tr>
</table>

If you need to request…	Enter it like this…
Consecutive half days off *Example: Hank's regular work schedule is 8 hours per day. He is taking 3 half-days (12 hours) of vacation.*	**ALL DAYS**  K. Partial Days = *All Days* L. All Days Hours = 4.0 M. **Duration** = Do nothing. It will be calculated by taking the All Days Hours (4) x the number of days taken (3) = 12 hrs.
Partial day at end of leave *Example: Hank's regular work schedule is 8 hours per day. He is taking 3 days of vacation. The first two days will be full days of vacation and the third will be a half-day (20 hours).*	**END DAY ONLY**  N. **Partial Days** = *End Day Only*. The Partial Hours only apply to the End Date (within a range). O. End Day Hours = 4.0 P. **Duration:** Do nothing. It will be calculated by taking his work schedule (8) x the number of full days taken (2) = 16 hrs. + the 4 hrs. taken on the half-day = 20 hrs.

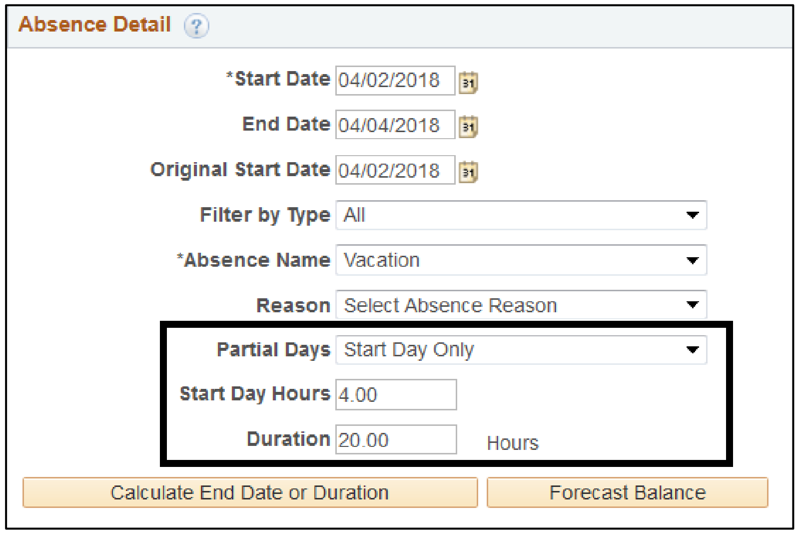
<table>
<tr><th>If you need to request…</th><th>Enter it like this…</th></tr>
<tr><td>

Partial day at beginning of leave

Example: Hank's regular work schedule is 8 hours per day. He is taking 3 days of vacation. The first day will be a half-day of vacation and the second and third day will be full days (20 hours).

</td><td>

START DAY ONLY



Q. **Partial Days** = Start Day Only. The Partial Hours only apply to the Start Date (within a range).
R. Start Day Hours = 4.0
S. **Duration:** Do nothing. It will be calculated by taking his work schedule (8) x the number of full days taken (2) = 16 hrs. + the 4 hrs. taken on the half-day = 20 hrs.

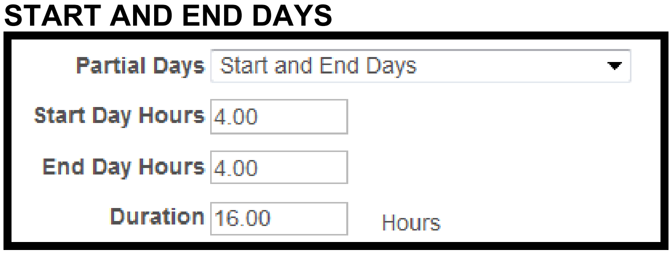
</td></tr>
<tr><td>

Partial day at beginning and end of leave

Example: Hank's regular work schedule is 8 hours per day. He is taking 3 days of vacation. The first day will be a half-day, the second day will be a full day, and the last day will be a half-day (16 hours).

</td><td>

START AND END DAYS



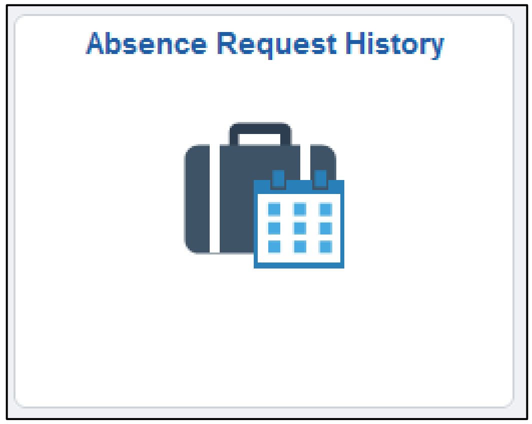
T. **Partial Days** = Start and End Days. The Partial Hours only apply to the Start Date and End Date (within a range).
U. Start Day Hours = 4.0
V. End Day Hours = 4.0
W. **Duration:** Do nothing. It will be calculated by taking his work schedule (8) x the number of full days taken (1) = 8 hrs. + the hours taken on the 2 half-days (4 hrs.) + (4 hrs.) = 16 hrs.

</td></tr>
</table>

Edit a Saved, Denied, or Pushed Back Absence Request

To edit a saved, denied, or pushed back absence request, use the Absence Request History screen. Absences must be in the future in order to edit.

1. Click on the **Time and Absence** tile then the **Absence Request** History tile.



2. In the list of absences, look for the saved, denied, or pushed back absence request. If necessary, set the date range and click **Refresh**. Click **Edit**.

From 12/12/2017 **Through** 06/10/2018 Refresh

Absence Request History Personalize | Find | View All | | First 1-7 of 7 Last

Absence Name	Status	Start Date	End Date	Duration	Requested By	Edit	Cancel
Personal Necessity	Cancel In Progress	03/26/2018	03/26/2018	4 Hours	Employee Absence Request	Edit	Cancel
Vacation	Approved	03/19/2018	03/21/2018	20 Hours	Employee Absence Request	Edit	Cancel
Personal Business	Saved	03/12/2018	03/12/2018	8 Hours	Employee Absence Request	Edit	Cancel
Personal Necessity	Denied	03/06/2018	03/06/2018	4 Hours	Employee Absence Request	Edit	Cancel
Vacation	Push Back	02/28/2018	03/05/2018	28 Hours	Employee Absence Request	Edit	Cancel
Jury Duty / Judicial	Submitted	02/27/2018	02/27/2018	8 Hours	Employee Absence Request	Edit	Cancel
Sick	Approved	02/26/2018	02/26/2018	8 Hours	Employee Absence Request	Edit	Cancel

3. Make any necessary changes, then submit for approval.

   NOTE ABOUT DENIED REQUESTS: If your manager denied the request, you may not resubmit it with the exact same date(s), absence name, or comments; you must change the request in some way.

Cancel an Absence Request

To cancel a future absence request, use the Absence Request History screen. You can do this even if your manager has already approved the request. Canceling a request will send a notification email message to your manager (the employee listed as your "Reports To" on your Job Data record). You can only cancel a future dated request. If they are in the past, you will need to contact your Payroll Department and have them edit.

1. Click on the **Time and Absence** tile then the **Absence Request** History tile.

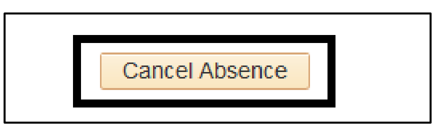
2. In the list of absences, look for the absence request that you want to cancel. If necessary, set the date range and click **Refresh**. Click **Cancel**.

From 12/12/2017 **Through** 06/10/2018 Refresh

Absence Request History — Personalize | Find | View All | First 1-7 of 7 Last

Absence Name	Status	Start Date	End Date	Duration	Requested By	Edit	Cancel
Personal Necessity	Cancel In Progress	03/26/2018	03/26/2018	4 Hours	Employee Absence Request	Edit	Cancel
Vacation	Approved	03/19/2018	03/21/2018	20 Hours	Employee Absence Request	Edit	Cancel
Personal Business	Saved	03/12/2018	03/12/2018	8 Hours	Employee Absence Request	Edit	Cancel

3. Scroll to the bottom of the page. Click **Cancel Absence**.



4. You should see a message that says, "*Are you sure you want to Cancel this Absence Request?*" Click **Yes**. This will cancel the absence request.

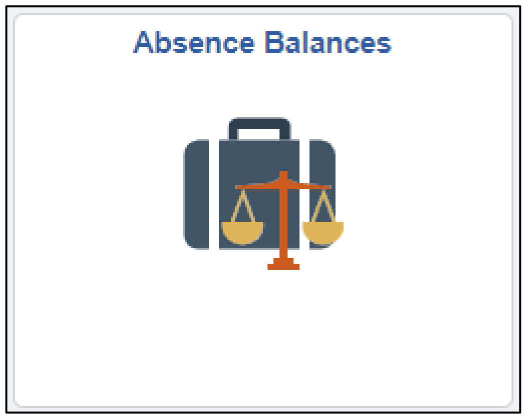
5. A confirmation message will appear that says, "*The Absence Request was successfully canceled.*" Click **OK**.

   - An email message regarding the cancelation will be sent to your manager.
   - You (employee) will receive an email notification indicating that the request was canceled. The exception is if your manager had denied or pushed back your request; in that case you will not receive an email notification when you cancel.
   - Your debited hours will be returned the next day. A nightly process needs to run to update the hours in your absence balances.

View Current Balances and Forecast

To view current balances and forecast, use the Absence Balances screen. For the Current Balance, PeopleSoft always looks at the finalized absence period. After payroll runs each month, you will see the balances from the previous finalized absence period.

1. Click on the **Time and Absence** tile then the **Absence Request** History tile.



2. This screen shows your current balances. The current balances do not reflect absence requests not processed by payroll. NOTE: When your district first starts using PeopleSoft and the first payroll has not yet run, no current balances exist; the screen will say “There are no current balances to display” and you will have 0.00 hours. You must forecast in Step 3 to see your balances.

Absence Entitlement Balances Personalize |

Current Balances

Entitlement Name	Balance as of 01/31/2018	From	To	Accrual Period
Personal Business Ent Balance	64.00 Hours	07/01/2017	06/30/2018	Year to Date
Personal Necessity Ent Balance	112.00 Hours	07/01/2017	06/30/2018	Year to Date
Sick Ent Balance	244.00 Hours	07/01/2017	06/30/2018	Year to Date
Vacation Ent Balance	528.00 Hours	07/01/2017	06/30/2018	Year to Date

Go To Forecast Balance

3. You can forecast balances to see if you have enough sick leave, vacation, and so on, as of a certain date. To do this, click the **Forecast Balance** link (found at the bottom of the screen). This will take you to a different screen.

4. Enter the **As of Date** and **Absence Name**. Click **Forecast Balance**. Review the forecasted balance details.

Forecast Balance

As of Date 03/12/2018

Filter by Type All

*Absence Name Vacation

Current Balance 528.00 Hours**

Completed Successfully!

The Current Balance is the balance from the previous finalized absence period.

Forecast Balance

Forecast Balance Details **Forecast results appear here** Personalize |

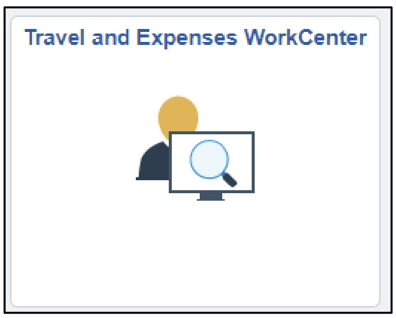
Forecast Results Accumulator Results

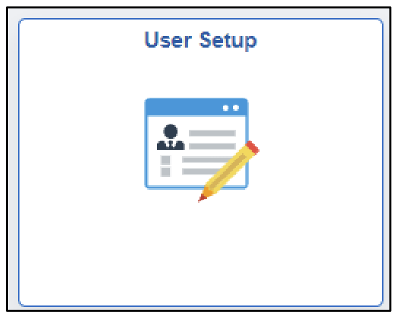
Absence Name	Forecast Element	Value
Vacation	As of Date - Forecasted Available Balance	500.00
Vacation	As of Date - Forecasted Total Takes	60.00

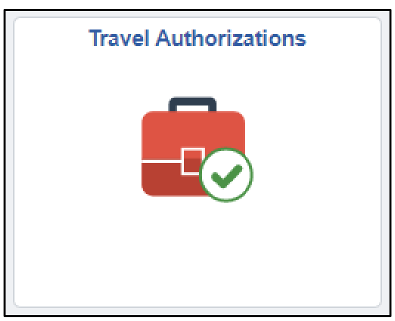
Part IV: Travel and Expense

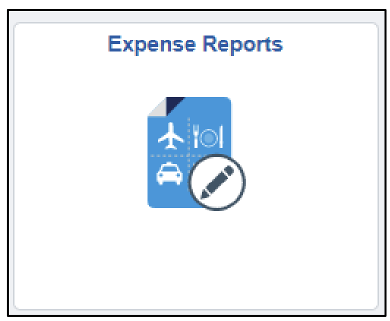
Entering Travel & Expenses

These tiles provide easy access to Travel and Expense, Travel Authorizations and Expense Reports.









Refer to the Travel & Expenses Guide at https://crc.sdcoe.net/resources/finance-training-materials for information on creating travel authorizations and expense reports.

Part IV: Managers Only – Approving Absence Requests

Approving Leave Requests (Managers Only)

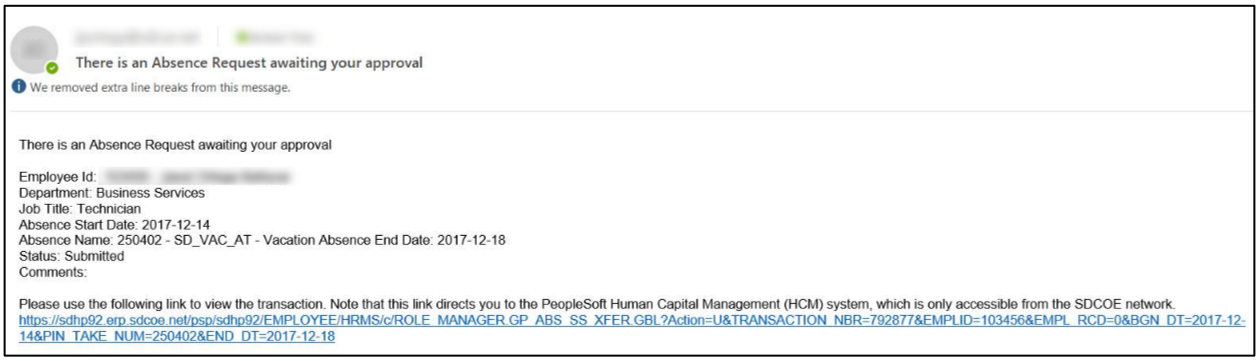
USED BY SDCOE ONLY

Managers can approve, deny, or push back absence requests.

OPTION 1: Link in Email

1. You will receive an email message from the employee's email address indicating that there is an absence request to approve. To approve the absence, you have three options:
2. Click the link in the email message.

   NOTE: When you click this link, it takes you to PeopleSoft HCM (not ESS); this may not work if you are doing this from home. In this circumstance, use Options 2 or 3.



There is an Absence Request awaiting your approval

We removed extra line breaks from this message.

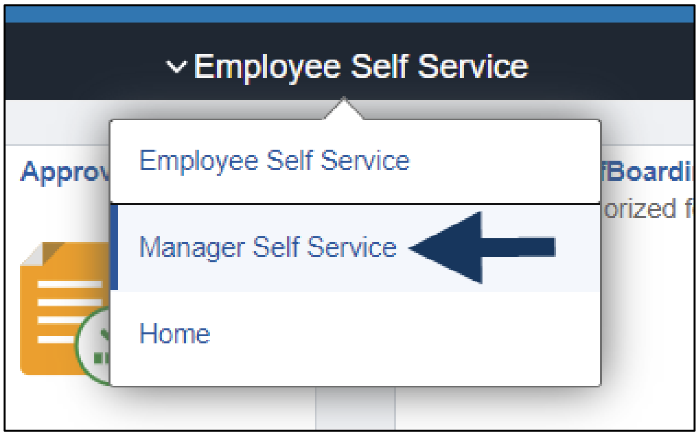
There is an Absence Request awaiting your approval

Employee Id:
Department: Business Services
Job Title: Technician
Absence Start Date: 2017-12-14
Absence Name: 250402 - SD_VAC_AT - Vacation Absence End Date: 2017-12-18
Status: Submitted
Comments:

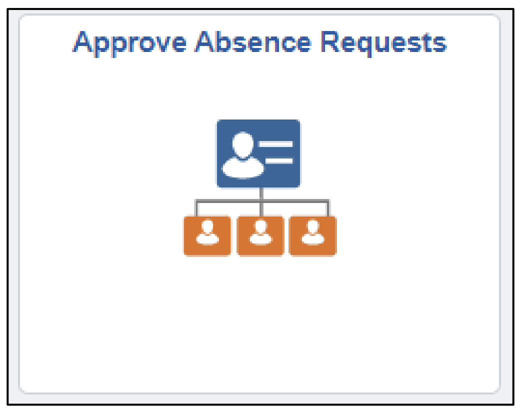
Please use the following link to view the transaction. Note that this link directs you to the PeopleSoft Human Capital Management (HCM) system, which is only accessible from the SDCOE network.
https://sdhp92.erp.sdcoe.net/psp/sdhp92/EMPLOYEE/HRMS/c/ROLE_MANAGER.GP_ABS_SS_XFER.GBL?Action=U&TRANSACTION_NBR=792877&EMPLID=103456&EMPL_RCD=0&BGN_DT=2017-12-14&PIN_TAKE_NUM=250402&END_DT=2017-12-18

OPTION 2: Approve Absence Request Screen

1. From the Home page of ESS, click the drop down in the center and select **Manager Self Service**.

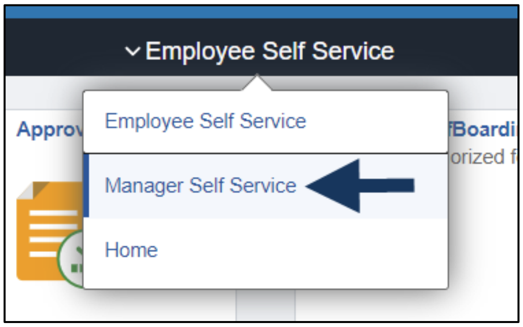


2. Click on the **Team Time and Absence** tile then the **Approve Absence Requests tile**. This screen will have a simple interface. You click the employee's name to review the request. From this screen, you can see all Pending, Approved, and Denied requests.

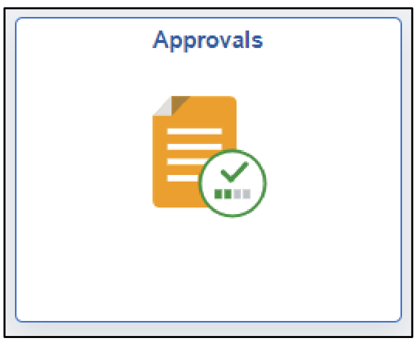


OPTION 3: Pending Approvals Worklist.

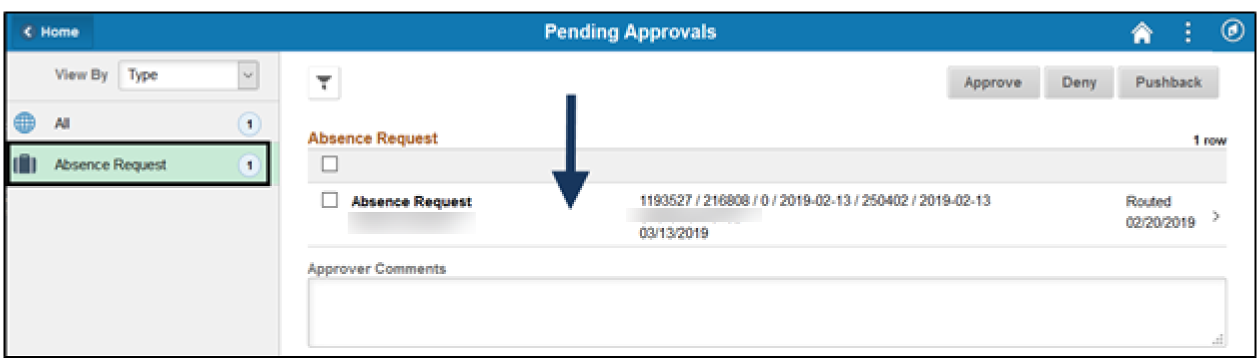
1. From the Home page of ESS, click the drop down in the center and select **Manager Self Service**.



2. Click on the Approvals tile to go to see Pending Approvals. The worklist shows items pending approval. You click the link next to the employee's name to review the request.

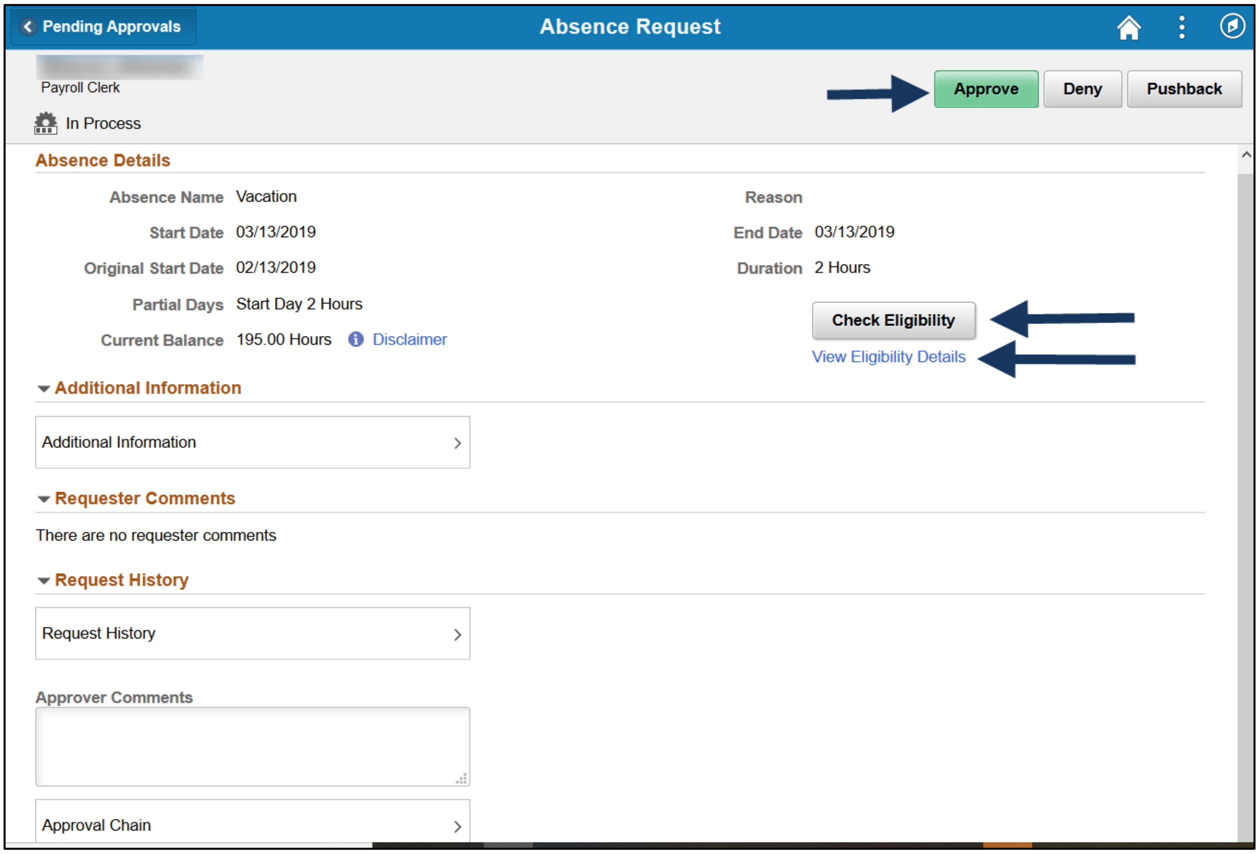


3. **Select Absence Request** from the *View By* > *Type* screen. Click on transaction to review.

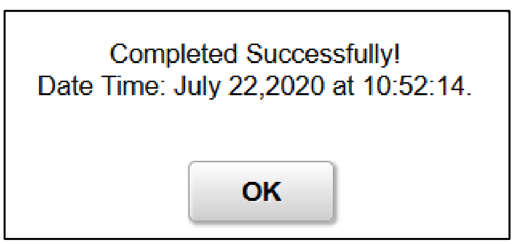


4. There are several items you can **review** before approving the transaction or you can just **click Approve.**

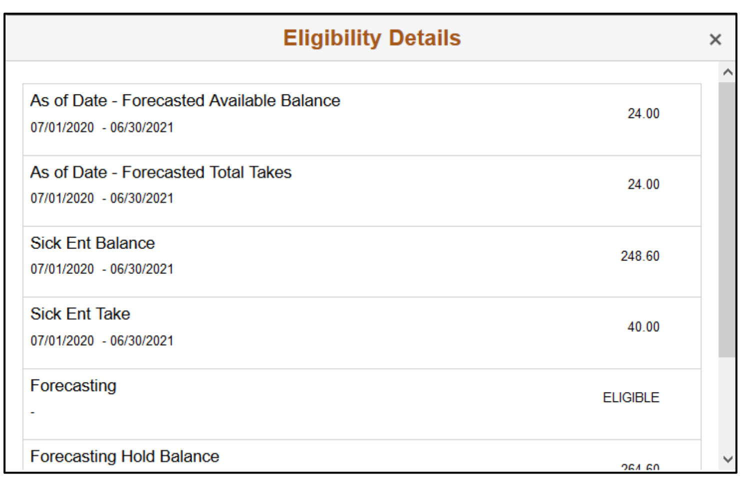
   - Check Eligibility
   - View Eligibility Details
   - Additional Information
   - Request History
   - Approval Chain



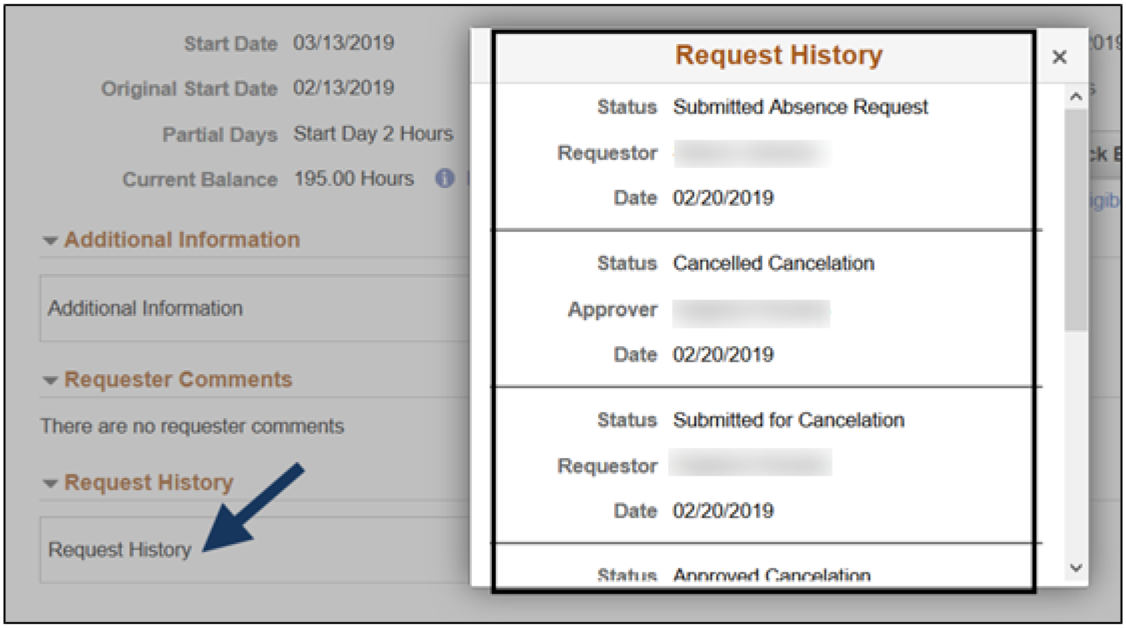
Check Eligibility results



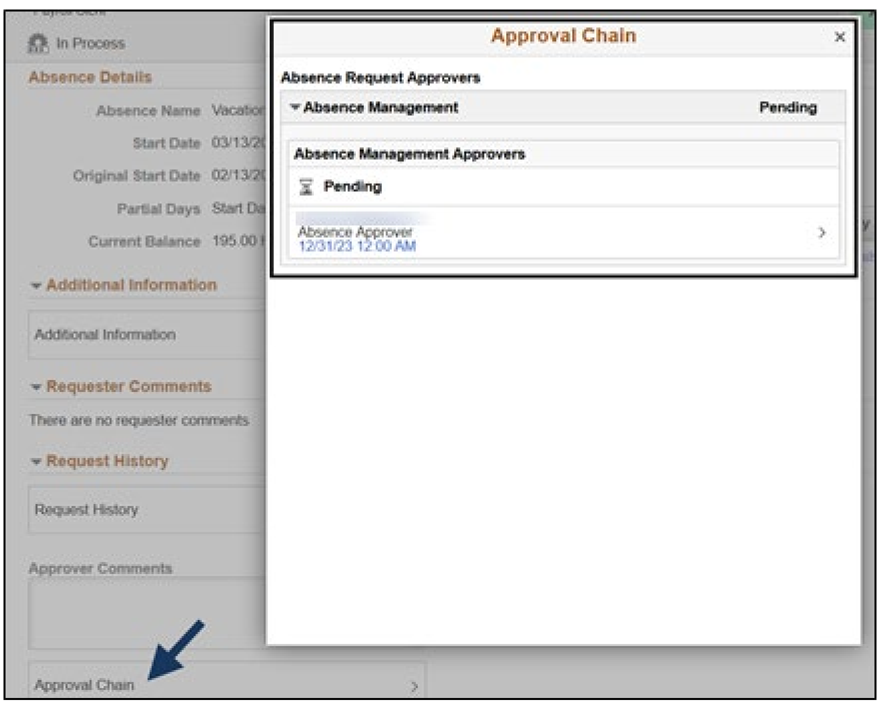
View Eligibility Details



Request History

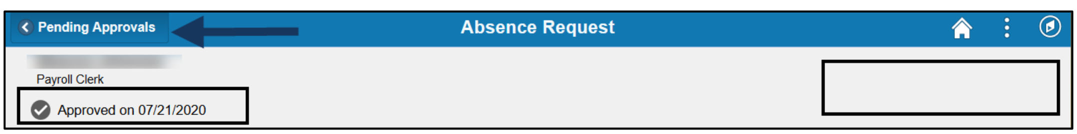


Approval Chain

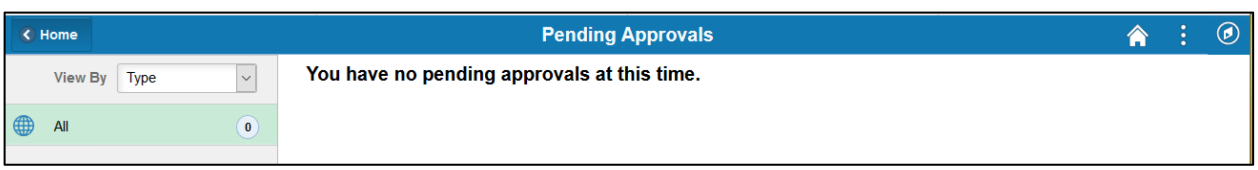


5. Click **Approve, Deny or Pushback**
   - **Approve = You approve the request.**
     After you click Approve, neither you nor the employee can edit the request. If changes need to be made, contact the department in your district that handles Absence Management.
   - **Deny = You deny the request** and are sending it back to the employee.
     The employee may edit the request and resubmit it. In most cases, you will want to enter a reason why the request is denied. If the employee resubmits the request, he or she must change the absence request in some way (dates, absence name) prior to submitting.
   - **Push Back** = The request requires rework and is pushed back to the previous approver (or in many cases, the employee, if no previous approver).
     The request can be edited and resubmitted.
6. Add Comments if you want, then click **Submit.**

7. Once Approved, Transaction will show **Approved** on the left. If there are additional approvers, it will show “In Process” and the name of the next approver. Options on the right will be gone.



8. Click on **Pending Approvals** to return to Pending Approvals page. In this case there were no other approval on the list.



9. Click **Home button on the left** to return to the home screen. Click on the next absence to approve.