

PeopleSoft

Employee Self-Service (ESS)

Version 4.9 | Updated July 17, 2024



PREPARED BY SDCOE PEOPLESFT SUPPORT

Copyright ©2015-2024, San Diego County Board of Education.

This document may be reproduced internally at the San Diego County Office of Education for the San Diego Board of Education. Except as noted, no part of the publication may be reproduced, transcribed, stored in retrieval systems, or translated into any language in any form by any means without the written permission of the San Diego County Board of Education, 6401 Linda Vista Road, San Diego, CA 92111-7399.

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

Contents

Contents.....	i
About This Guide	1
Homepage	1
Toolbar.....	2
Part I: PeopleSoft Log in and Password Set up.....	4
Logging Into ESS.....	5
Changing Your Password.....	6
Setting Up “I Forgot My Password” – VERY IMPORTANT!	7
Resetting a Forgotten or Expired Password.....	9
Part III: Viewing Paycheck and Compensation	12
Payroll and Compensation.....	13
Viewing Paychecks.....	14
How to Read Your PeopleSoft Paycheck	16
Compensation Split.....	19
Earnings Code Descriptions	22
ESS Withholding Forms: Federal and State.....	24
View W-2 Form	31
ESS Direct Deposit Set up for Employee	32
Part IV: Health and Benefits.....	53
My Health Card.....	54
Part IV: Personal Details	55
Personal Details.....	56
Viewing Benefits Information	75
Part IV: Time and Absence	80
Overview of Absence Requests	81
Part IV: Travel and Expense	92
Entering Travel & Expenses	93
Part IV: Managers Only – Approving Absence Requests.....	94
Approving Leave Requests (Managers Only).....	95

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

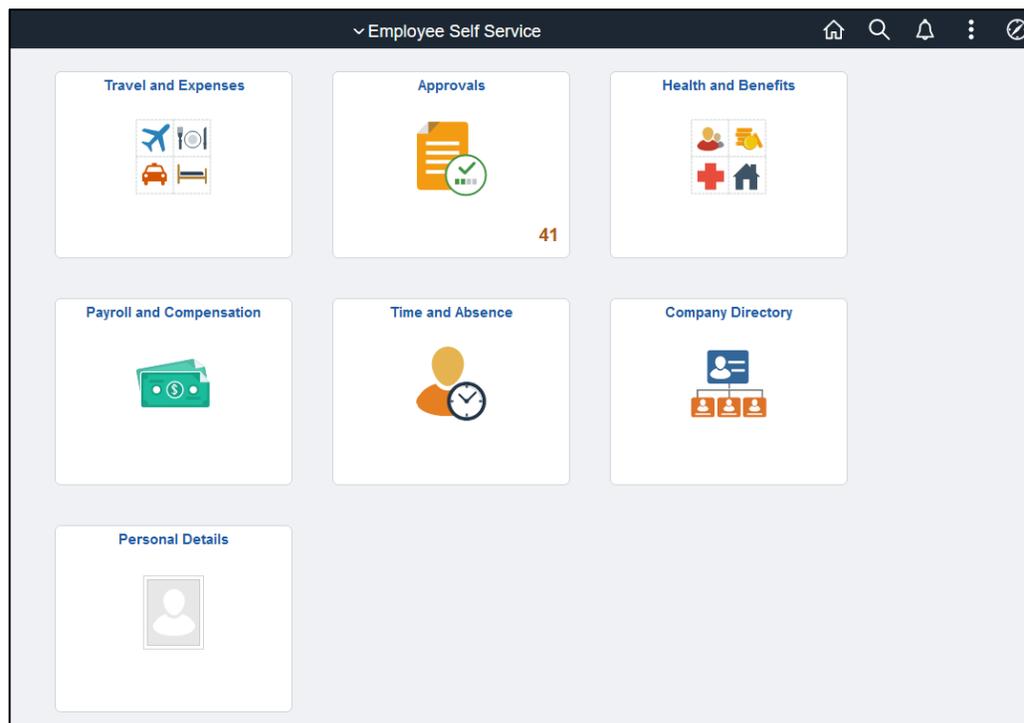
- View your paycheck
- Review and update your personal information
- Update your Peoplesoft profile
- Review your benefits information (*may not apply to all districts*)
- Enter travel requests and expense reports (*may not apply to all districts*)
- Enter absence requests and view absence balances (*may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

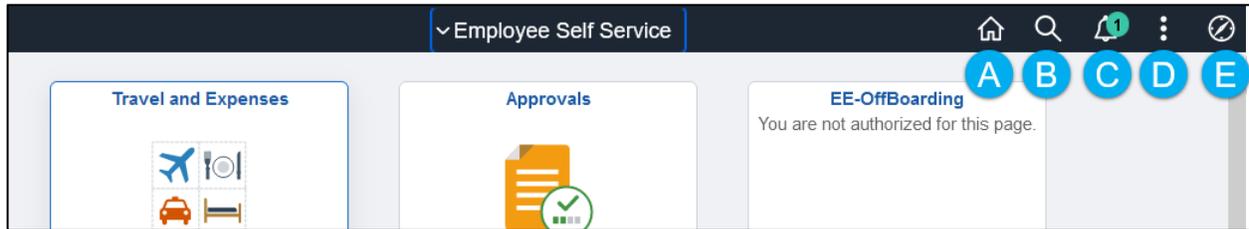
The Home Page is the first screen you see when logging into PeopleSoft Employee Self-Service (ESS). <https://ess.erp.sdcoe.net>

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

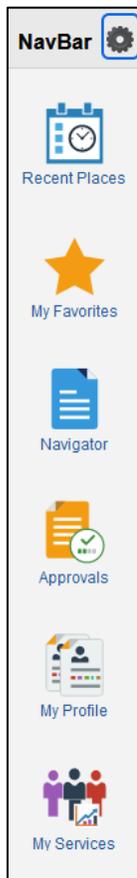


Toolbar

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:

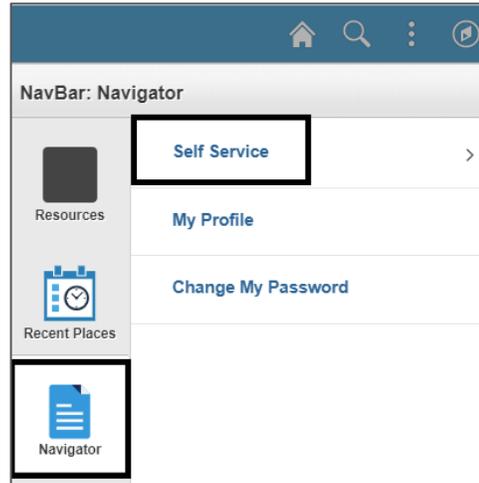
- Links to change password
- Change or set up forgotten password help
- Alternate User setup
- Email setup

My Services: Has links to:

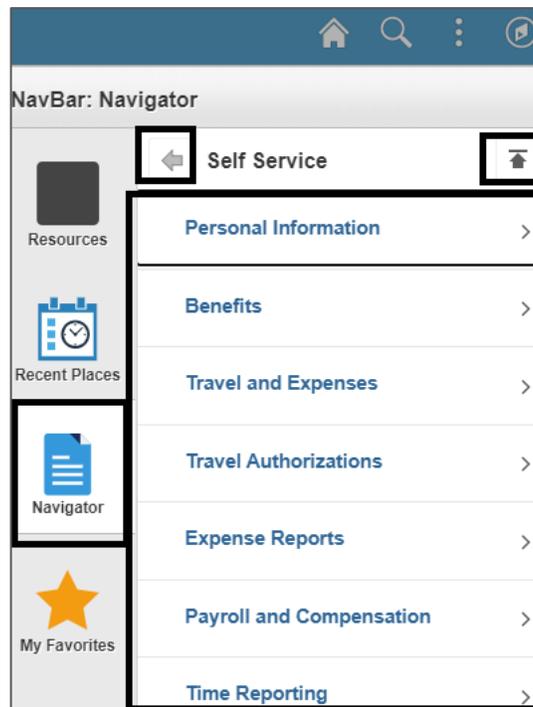
- Announcements
- Guides and Job Aids
- HR Dashboard
- CBO Dashboard
- Support Calendar
- Training and Events webpage
- System Status webpage
- ServiceNow
- Customer Advisory Board webpage.

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.

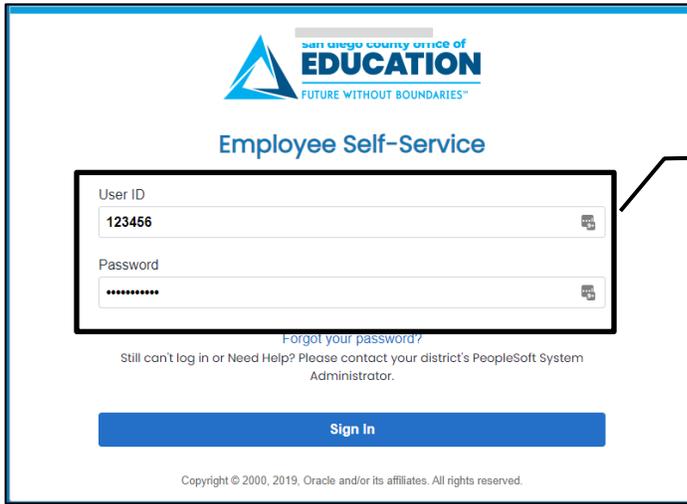
Part I: PeopleSoft Log in and Password Set up

Logging Into ESS

This URL takes you to the [PeopleSoft Employee Self-Service \(ESS\)](https://ess.erp.sdcoe.net) 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.

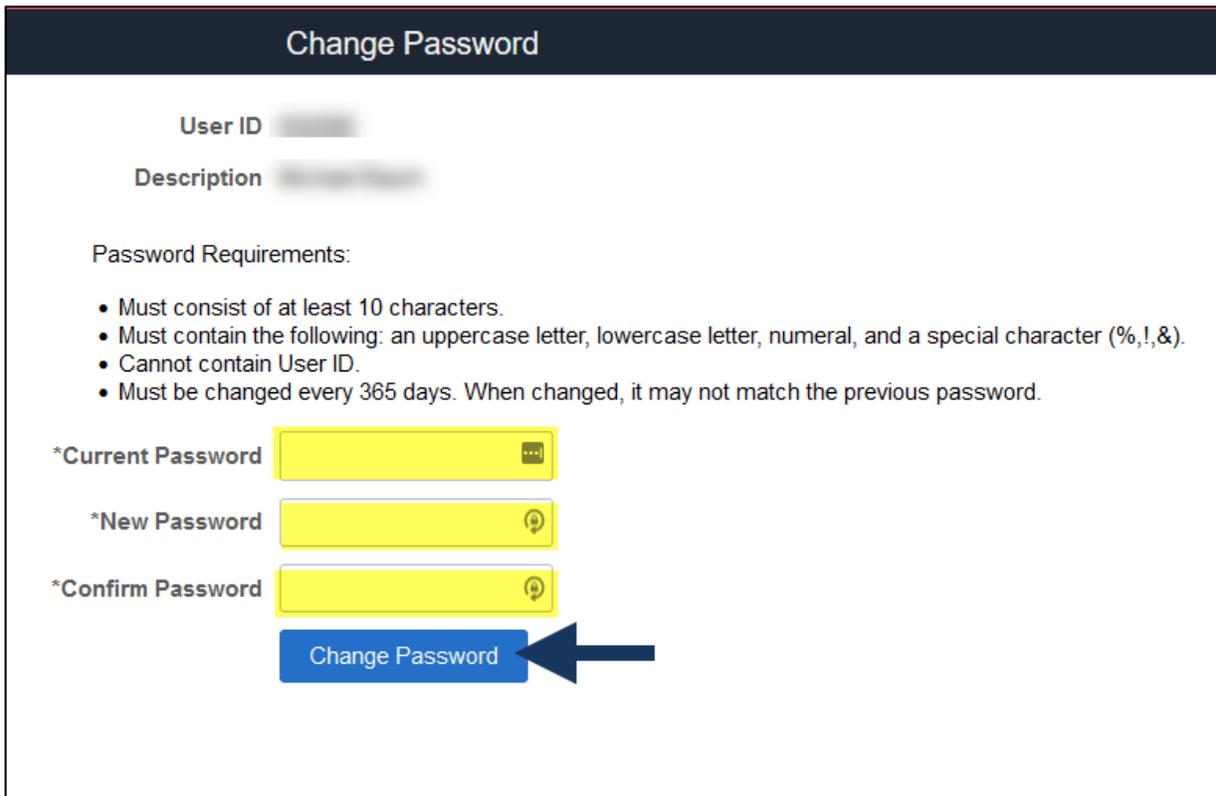
Provide your name, User ID, and a description of the problem. If necessary, the district PeopleSoft contact will work with the SDCOE PeopleSoft Support Team to resolve the issue.

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.



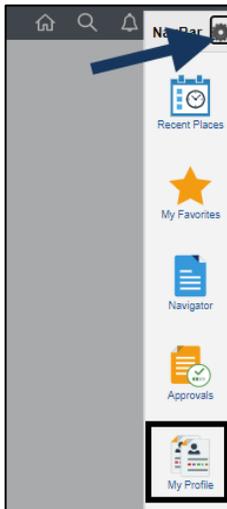
The screenshot shows a web form titled "Change Password". At the top, it displays "User ID" and "Description" with blurred values. Below this, the "Password Requirements" are listed as bullet points: "Must consist of at least 10 characters.", "Must contain the following: an uppercase letter, lowercase letter, numeral, and a special character (%,!,&).", "Cannot contain User ID.", and "Must be changed every 365 days. When changed, it may not match the previous password." The form contains three input fields: "*Current Password" (highlighted in yellow with a visibility icon), "*New Password" (highlighted in yellow with a visibility icon), and "*Confirm Password" (highlighted in yellow with a visibility icon). A blue "Change Password" button is located at the bottom, with a large black arrow pointing to it from the right.

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**.

General Profile Information

Password

[Change password](#)

[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.

Change or set up forgotten password help

If you forget your password, you can have a new password emailed to you.
Enter a question and your response below. These will be used to authenticate you.

Question What is the name of your favorite childhood pet?

Select from the list of questions.

Response Spot

OK Cancel

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

Email

Primary Email Account	Email Type	Email Address		
<input checked="" type="checkbox"/>	Business ▼	jdoe@sdcoe.net 	+	-

IM Information

Protocol	XMPP Domain	UserID	Password		
XMPP	<input type="text"/>	<input type="text"/>	<input type="text"/>	+	-

Save 

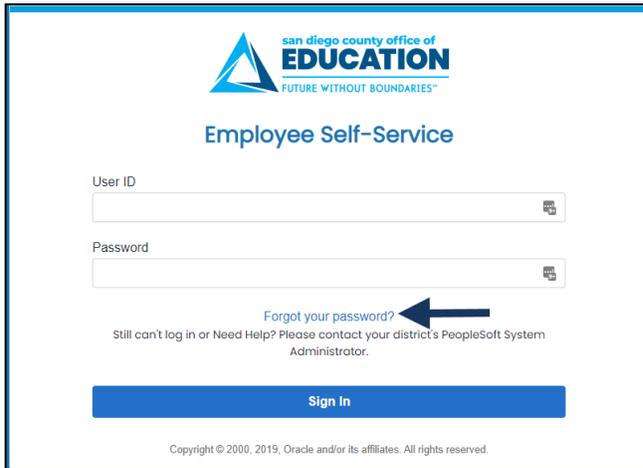
2. Click **Save** to save your changes.
3. If necessary, click **Home** to go to the Home page.

Resetting a Forgotten or Expired Password

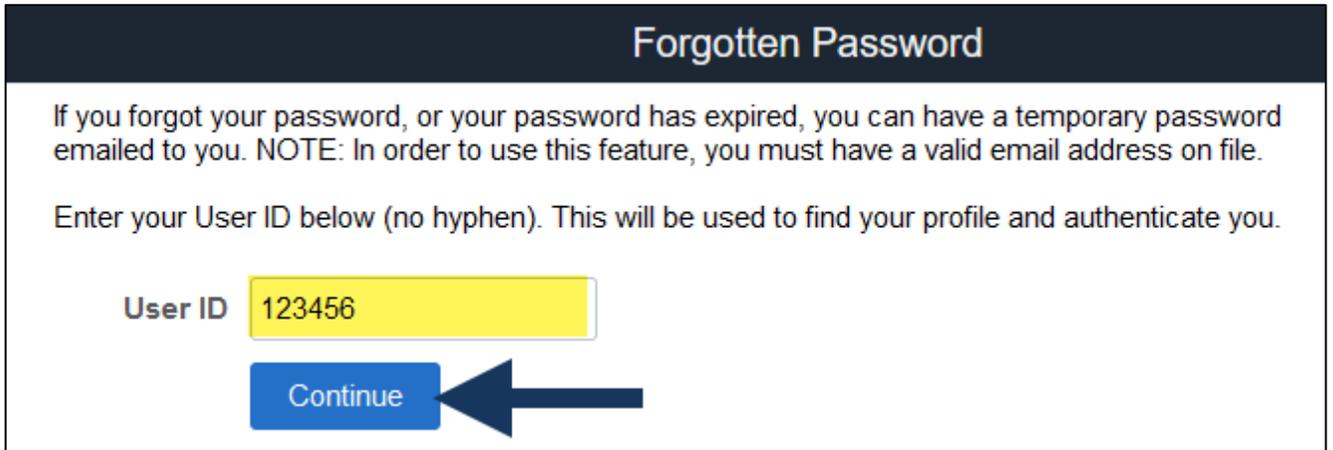
You may follow these directions to reset a forgotten or expired password if you have previously set up “I Forgot My Password” (p.7). If you did not set this up, please contact your district’s PeopleSoft Security Administrator and ask them to reset your password. Be sure to enroll in “I Forgot My Password”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



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

Security Question

User ID 123456

Please answer the following question below for user validation.

Question What is the name of your favorite childhood pet?

Response

←

- The screen will say, "Your password has been emailed." You can now close this window/tab.

Email Confirmation

Your new password has been emailed.

If you do not receive an email in your Primary Email Account please contact your Security Administrator or System Administrator to investigate the cause.

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

! 📧 📎 📧	FROM	SUBJECT
▲ Date: Today	SDPP91@Cherryroad.com	Temporary PeopleSoft Password
Dear PeopleSoft User, Here is your temporary password that you can use to log into PeopleSoft.		

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



Employee Self-Service

User ID

Password

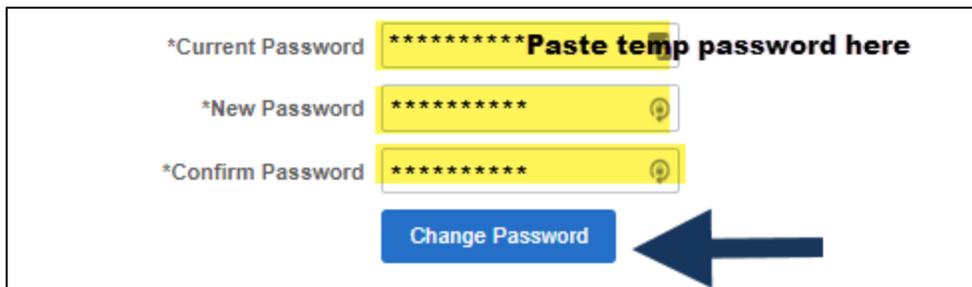
Forgot your password?
Still can't log in or Need Help? Please contact your district's PeopleSoft System Administrator.

Copyright © 2000, 2019, Oracle and/or its affiliates. All rights reserved.

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

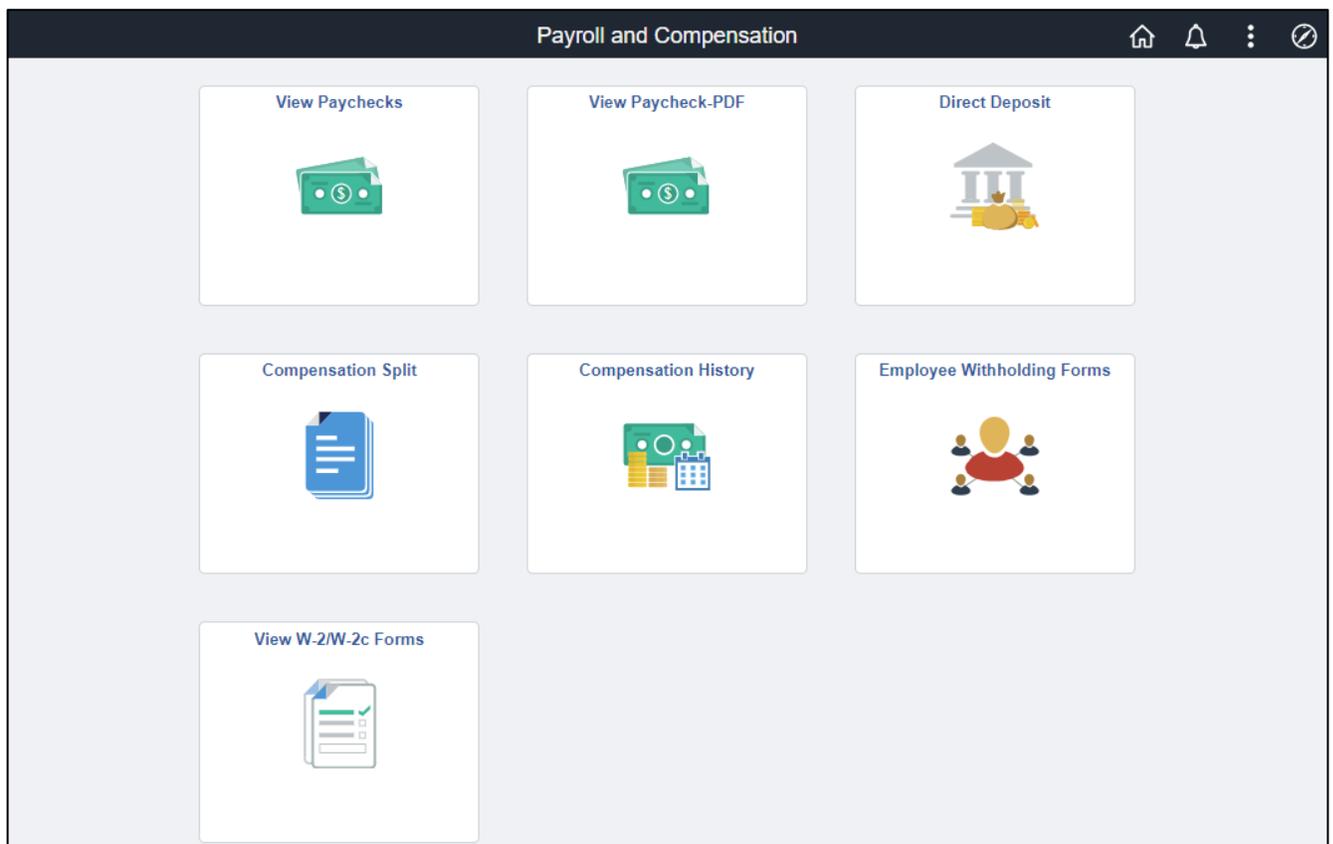
Payroll and Compensation

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.

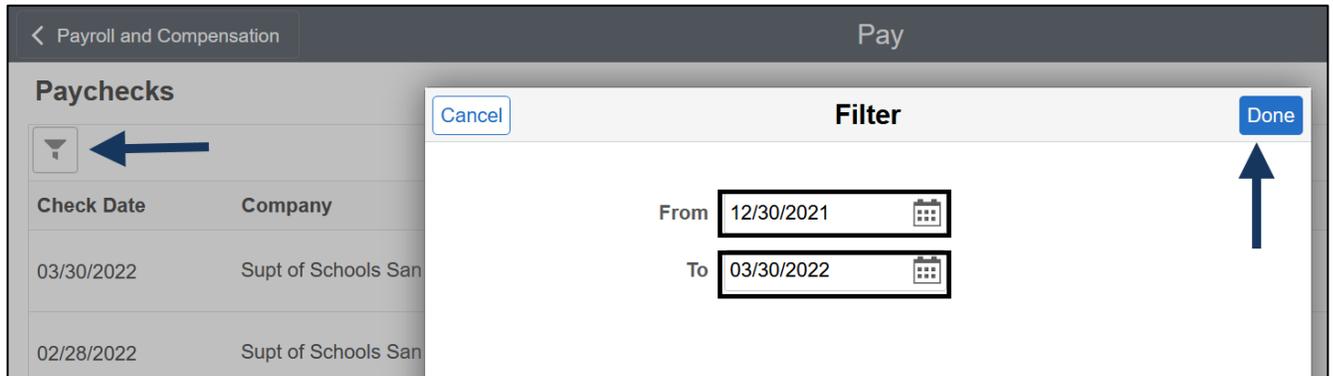
Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number
03/30/2022	Supt of Schools San Diego Co	03/01/2022 03/31/2022	██████	3295692
02/28/2022	Supt of Schools San Diego Co	02/01/2022 02/28/2022	██████	3250586
01/31/2022	Supt of Schools San Diego Co	01/01/2022 01/31/2022	██████	3206098

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

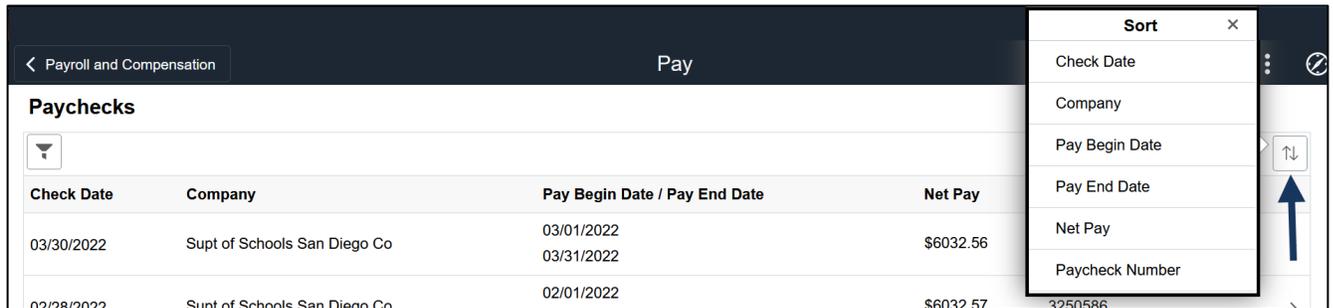
Note: If Paycheck does not open, check that your pop-up blocker is turned off.

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	
		Marital Status: Single		CA State S/M-2 Inc: 0	
		Allowances: N/A		Adtl. Percent: N/A	
		Adtl. Amount:			
HOURS AND EARNINGS			TAXES		
Description	Rate	Current Units	Earnings	Units	Earnings
Regular					
Off Schedule Without PERS					
Retro Regular					
TOTAL:		0.00	10,837.50	0.00	102,797.05
Description	Current	YTD	Description	Current	YTD
Fed Withholding			Fed Withholding		
Fed MED/EE			Fed MED/EE		
Fed GASD/EE			Fed GASD/EE		
CA Withholding			CA Withholding		
TOTAL:			TOTAL:	3,069.52	30,121.65
BEFORE-TAX DEDUCTIONS		AFTER-TAX DEDUCTIONS		EMPLOYER PAID BENEFITS	
Description	Current	YTD	Description	Current	YTD
Medical Deductions Pre-Tax			Medical Deductions Pre-Tax		
PERS Deduction			Dental Deduction After Tax		
Amer Fidelity - Accident - BT			Vision Deduction After Tax		
Amer Fidelity - Cancer - BT			Life Insurance Deduction		
American Fidelity Hlth FSA			Life Insurance Deduction*		
			PERS Deduction		
			SDCOE Workers Comp		
			OPEB % DEDUCTION		
			OPEB AMOUNT DEDUCTION		
TOTAL:	1,107.86	9,376.79	TOTAL:	66.20	473.40
TOTAL GROSS		FED TAXABLE GROSS		TOTAL TAXES	
TOTAL DEDUCTIONS		NET PAY			
Current					
YTD					
Absence Balances		NET PAY DISTRIBUTION			
Vacation Balance		Advice #000000004101139	Account Type	Checking	Deposit Amount
Sick Balance			Checking		
Personal Necessity Balance					
Personal Business Balance					
		TOTAL:			

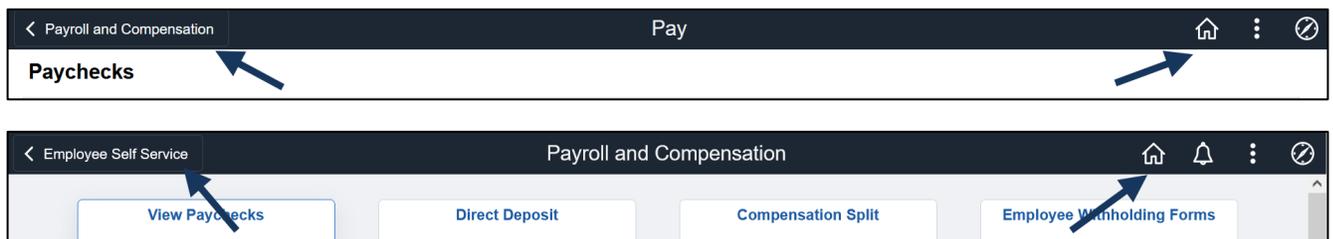
4. **Close paycheck window** to return to Paychecks screen.
5. To see **Paychecks for a specific date range**, use the **filter icon** on the upper left corner of the screen. **Select date range** and **click Done**.



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		Pay Group: 17M-Jamul-Dulzura Union Pay Group Pay Begin Date: 11/01/2014 Pay End Date: 11/30/2014	Business Unit: 01700 Advice #: 000000000002315 Advice Date: 11/26/2014																																																																				
1A		1B	1C																																																																				
John Doe 123 State Street San Diego CA 92103		Employee ID: 123456 Department: 999-District Wide Location: Public School District	TAX DATA: Federal: Married CA State: H-of-H Allowances: 6 Addl. Percent: 3 Addl. Amount:																																																																				
2		3																																																																					
HOURS AND EARNINGS																																																																							
<table border="1"> <thead> <tr> <th rowspan="2">Description</th> <th colspan="2">Prior Period</th> <th colspan="2">Current</th> <th colspan="2">YTD</th> </tr> <tr> <th>Begin Date</th> <th>End Date</th> <th>Rate</th> <th>Hours</th> <th>Earnings</th> <th>Hours</th> </tr> </thead> <tbody> <tr> <td>Regular</td> <td></td> <td></td> <td></td> <td></td> <td>5,260.83</td> <td></td> </tr> <tr> <td>Equ Allow</td> <td></td> <td></td> <td></td> <td></td> <td>50.00</td> <td></td> </tr> <tr> <td>Mileage</td> <td></td> <td></td> <td></td> <td></td> <td>150.00</td> <td></td> </tr> <tr> <td>Cafe Cash</td> <td></td> <td></td> <td></td> <td></td> <td>0.00</td> <td></td> </tr> <tr> <td>TOTAL:</td> <td></td> <td></td> <td>0.00</td> <td>5,460.83</td> <td>0.00</td> <td>58,243.09</td> </tr> </tbody> </table>				Description	Prior Period		Current		YTD		Begin Date	End Date	Rate	Hours	Earnings	Hours	Regular					5,260.83		Equ Allow					50.00		Mileage					150.00		Cafe Cash					0.00		TOTAL:			0.00	5,460.83	0.00	58,243.09																				
Description	Prior Period		Current		YTD																																																																		
	Begin Date	End Date	Rate	Hours	Earnings	Hours																																																																	
Regular					5,260.83																																																																		
Equ Allow					50.00																																																																		
Mileage					150.00																																																																		
Cafe Cash					0.00																																																																		
TOTAL:			0.00	5,460.83	0.00	58,243.09																																																																	
4																																																																							
TAXES																																																																							
<table border="1"> <thead> <tr> <th>Description</th> <th>Current</th> <th>YTD</th> </tr> </thead> <tbody> <tr> <td>Fed Withholding</td> <td>144.05</td> <td>1,944.31</td> </tr> <tr> <td>Fed MED/EE</td> <td>70.13</td> <td>757.55</td> </tr> <tr> <td>Fed OASDI/EE</td> <td>299.84</td> <td>3,239.17</td> </tr> <tr> <td>CA Withholding</td> <td>43.65</td> <td>614.52</td> </tr> <tr> <td>TOTAL:</td> <td>557.67</td> <td>6,555.55</td> </tr> </tbody> </table>				Description	Current	YTD	Fed Withholding	144.05	1,944.31	Fed MED/EE	70.13	757.55	Fed OASDI/EE	299.84	3,239.17	CA Withholding	43.65	614.52	TOTAL:	557.67	6,555.55																																																		
Description	Current	YTD																																																																					
Fed Withholding	144.05	1,944.31																																																																					
Fed MED/EE	70.13	757.55																																																																					
Fed OASDI/EE	299.84	3,239.17																																																																					
CA Withholding	43.65	614.52																																																																					
TOTAL:	557.67	6,555.55																																																																					
5																																																																							
BEFORE-TAX DEDUCTIONS		AFTER-TAX DEDUCTIONS		EMPLOYER PAID BENEFITS																																																																			
<table border="1"> <thead> <tr> <th>Description</th> <th>Current</th> <th>YTD</th> </tr> </thead> <tbody> <tr> <td>Medical Deductions Pre-Tax</td> <td>585.36</td> <td>0.00</td> </tr> <tr> <td>Dental Deductions Pre Tax</td> <td>12.98</td> <td>0.00</td> </tr> <tr> <td>Vision Plan Deduction Pre Tax</td> <td>23.60</td> <td>0.00</td> </tr> <tr> <td>Life Insurance Deduction</td> <td>2.75</td> <td>0.00</td> </tr> <tr> <td>457</td> <td>100.00</td> <td>0.00</td> </tr> <tr> <td>PERS PEPR</td> <td>616.45</td> <td>0.00</td> </tr> <tr> <td>TOTAL:</td> <td>1,341.14</td> <td>0.00</td> </tr> </tbody> </table>		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 PEPR	616.45	0.00	TOTAL:	1,341.14	0.00	<table border="1"> <thead> <tr> <th>Description</th> <th>Current</th> <th>YTD</th> </tr> </thead> <tbody> <tr> <td>Medical Deductions Pre-Tax</td> <td>600.04</td> <td>0.00</td> </tr> <tr> <td>Dental Deductions Pre Tax</td> <td>37.88</td> <td>0.00</td> </tr> <tr> <td>Life Insurance Deduction</td> <td>2.08</td> <td>0.00</td> </tr> <tr> <td>PERS PEPR</td> <td>1,209.37</td> <td>0.00</td> </tr> <tr> <td>Jamul Dulzura Workers' Comp</td> <td>103.21</td> <td>0.00</td> </tr> <tr> <td>TOTAL:</td> <td>0.00</td> <td>0.00</td> </tr> </tbody> </table>		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 PEPR	1,209.37	0.00	Jamul Dulzura Workers' Comp	103.21	0.00	TOTAL:	0.00	0.00	<table border="1"> <thead> <tr> <th>Description</th> <th>Current</th> <th>YTD</th> </tr> </thead> <tbody> <tr> <td>Medical Deductions Pre-Tax</td> <td>600.04</td> <td>0.00</td> </tr> <tr> <td>Dental Deductions Pre Tax</td> <td>37.88</td> <td>0.00</td> </tr> <tr> <td>Life Insurance Deduction</td> <td>2.08</td> <td>0.00</td> </tr> <tr> <td>PERS PEPR</td> <td>1,209.37</td> <td>0.00</td> </tr> <tr> <td>Jamul Dulzura Workers' Comp</td> <td>103.21</td> <td>0.00</td> </tr> <tr> <td>TOTAL:</td> <td>0.00</td> <td>0.00</td> </tr> </tbody> </table>		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 PEPR	1,209.37	0.00	Jamul Dulzura Workers' Comp	103.21	0.00	TOTAL:	0.00	0.00
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 PEPR	616.45	0.00																																																																					
TOTAL:	1,341.14	0.00																																																																					
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 PEPR	1,209.37	0.00																																																																					
Jamul Dulzura Workers' Comp	103.21	0.00																																																																					
TOTAL:	0.00	0.00																																																																					
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 PEPR	1,209.37	0.00																																																																					
Jamul Dulzura Workers' Comp	103.21	0.00																																																																					
TOTAL:	0.00	0.00																																																																					
6A		6B		7																																																																			
TOTAL:		TOTAL:		*TAXABLE																																																																			
<table border="1"> <thead> <tr> <th></th> <th>TOTAL GROSS</th> <th>FED TAXABLE GROSS</th> <th>TOTAL TAXES</th> <th>TOTAL DEDUCTIONS</th> <th>NET PAY</th> </tr> </thead> <tbody> <tr> <td>Current</td> <td>5,460.83</td> <td>4,119.69</td> <td>557.67</td> <td>1,341.14</td> <td>3,562.02</td> </tr> <tr> <td>YTD</td> <td>58,243.09</td> <td>47,805.29</td> <td>6,555.55</td> <td>13,877.40</td> <td>37,810.14</td> </tr> </tbody> </table>			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																																																			
	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																																																																		
<table border="1"> <thead> <tr> <th colspan="2">Absence Balances</th> </tr> </thead> <tbody> <tr> <td>Vacation Balance</td> <td>198.7</td> </tr> <tr> <td>Sick Balance</td> <td>176.0</td> </tr> <tr> <td>Personal Necessity Balance</td> <td>48.0</td> </tr> <tr> <td>Personal Business Balance</td> <td>8.0</td> </tr> </tbody> </table>		Absence Balances		Vacation Balance	198.7	Sick Balance	176.0	Personal Necessity Balance	48.0	Personal Business Balance	8.0	<table border="1"> <thead> <tr> <th colspan="3">NET PAY DISTRIBUTION</th> </tr> <tr> <th>Advice #</th> <th>Account Type</th> <th>Deposit Amount</th> </tr> </thead> <tbody> <tr> <td>#000000000002315</td> <td>Checking</td> <td>3,562.02</td> </tr> <tr> <td>TOTAL:</td> <td></td> <td>3,562.02</td> </tr> </tbody> </table>		NET PAY DISTRIBUTION			Advice #	Account Type	Deposit Amount	#000000000002315	Checking	3,562.02	TOTAL:		3,562.02	10																																													
Absence Balances																																																																							
Vacation Balance	198.7																																																																						
Sick Balance	176.0																																																																						
Personal Necessity Balance	48.0																																																																						
Personal Business Balance	8.0																																																																						
NET PAY DISTRIBUTION																																																																							
Advice #	Account Type	Deposit Amount																																																																					
#000000000002315	Checking	3,562.02																																																																					
TOTAL:		3,562.02																																																																					
9																																																																							

Area	Description	Fields
1	<p>Payroll Information <i>Consists of payroll information.</i></p>	<ul style="list-style-type: none"> ▪ 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	<p>Employee Information <i>Displays employee information.</i></p>	<ul style="list-style-type: none"> ▪ 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	<p>Tax Data <i>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.</i></p>	<ul style="list-style-type: none"> ▪ 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	<p>Hours and Earnings <i>Reports the employee's regular monthly salary and/or how many hours worked in the pay period, including overtime, holiday hours, and vacation hours.</i></p>	<ul style="list-style-type: none"> ▪ 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	<p>Taxes <i>Shows how much is being withheld for taxes.</i></p>	<ul style="list-style-type: none"> ▪ Fed Withholding: Federal income tax withheld ▪ Fed MED/EE: Employee portion of Medicare ▪ Fed OASDI/EE: Employee's portion of Social Security
6	<p>Before and After-Tax Deductions <i>Shows the before and after-tax deductions.</i></p>	<ul style="list-style-type: none"> ▪ 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	<p>Employer Paid Benefits <i>Shows employer paid benefits.</i></p>	<ul style="list-style-type: none"> ▪ If any amounts are included as taxable income, they will be indicated with an asterisk.

Area	Description	Fields
8	<p>Paycheck Summary <i>Displays a breakdown of current and year-to-date earnings, taxes, deductions, and net pay.</i></p>	<ul style="list-style-type: none"> ▪ 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	<p>Absences Balances <i>Shows your absence balances for vacation, sick, personal necessity, and personal business.</i></p>	<ul style="list-style-type: none"> ▪ Balances are displayed in hours.
10	<p>Net Pay Distribution <i>Shows net earnings for the pay period.</i></p>	<ul style="list-style-type: none"> ▪ If you have more than one account set up for direct deposit, each account and the amount of deposit will be shown

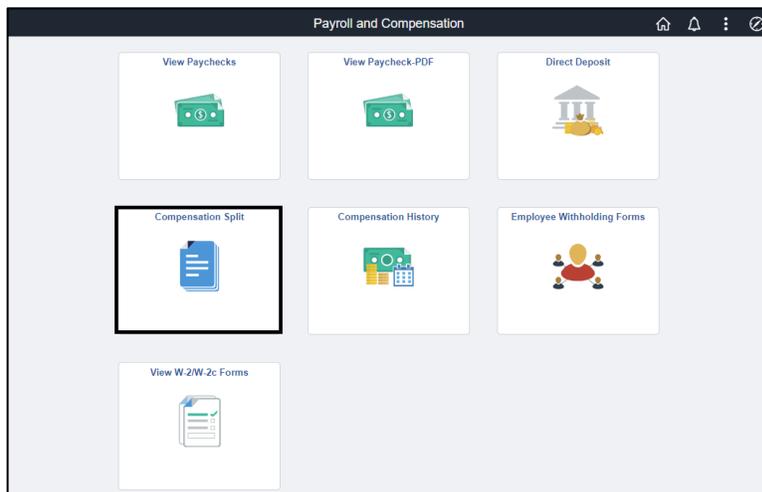
Compensation Split

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.

Compensation Split

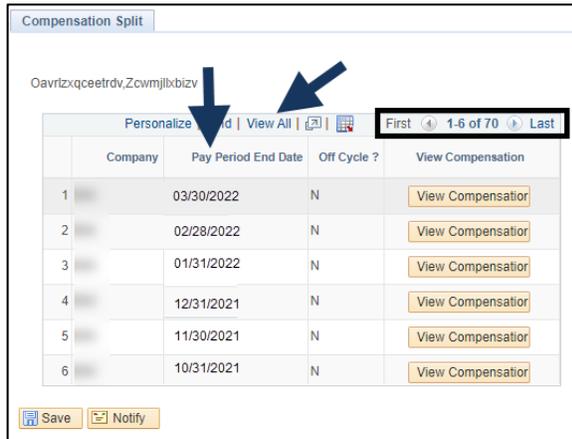
Oavrlzxqceetrdv_Zcwmjlbxbizv

Personalize | Find | View All | 1-6 of 70 | First | Last

	Company	Pay Period End Date	Off Cycle ?	View Compensation
1		03/30/2022		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](#)

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



Compensation Split

Oavrfzqxqceetrdv,Zcwmjlkxbizv

Personalize | Find | View All | [Print] | [Calendar] | First 1-6 of 70 Last

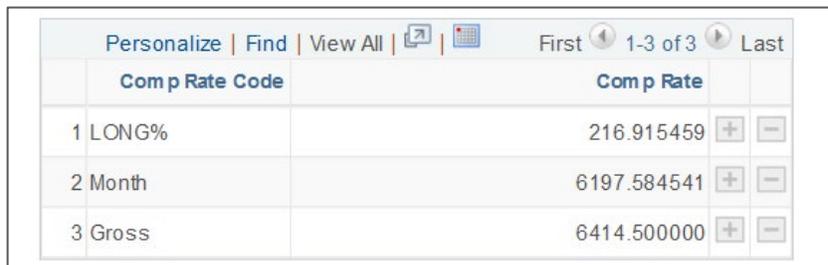
	Company	Pay Period End Date	Off Cycle ?	View Compensation
1		03/30/2022	N	View Compensator
2		02/28/2022	N	View Compensator
3		01/31/2022	N	View Compensator
4		12/31/2021	N	View Compensator
5		11/30/2021	N	View Compensator
6		10/31/2021	N	View Compensator

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)

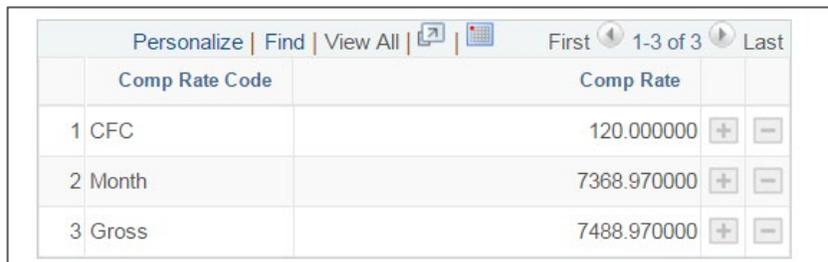


Personalize | Find | View All | [Print] | [Calendar] | First 1-3 of 3 Last

	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)

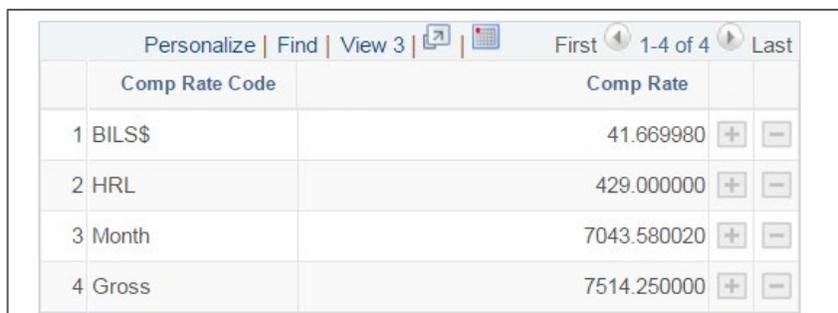


Personalize | Find | View All | [Print] | [Calendar] | First 1-3 of 3 Last

	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 | [Print] | [Calendar] | 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)

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



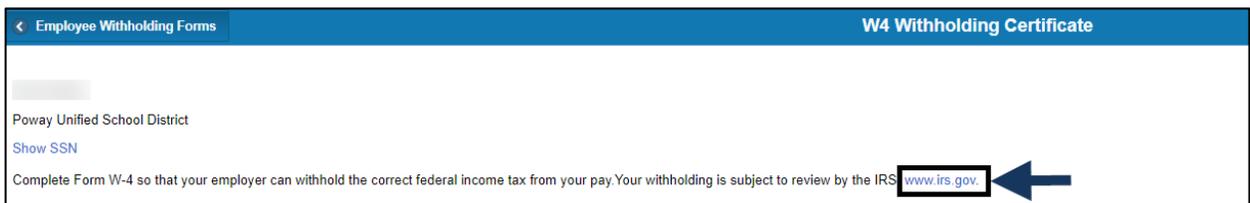
2. Click on Employee Withholding Forms



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

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

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.**

Step 1: Personal Information

Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.

Address

San Diego CA

Filing Status

Single or Married filing separately
 Married filing jointly (or Qualifying widow(er))
 Head of Household (Check only if you are unmarried and pay more than half the cost of keeping up a home for yourself and a qualifying individual).

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/M4App 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.

Claim Exemption from Withholding

I claim exemption from withholding for the year and I certify that I meet BOTH of the following conditions for exemption from withholding:

- Last year I owed no federal income tax.
- This year I expect to owe no federal income tax.

Check this box if you meet both conditions to claim exemption from tax withholding None

Read carefully and Click Submit when finished.

Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

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.

Withholding Updated Successfully. Employee will receive a notification email

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			
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.

Under the penalties of perjury, I certify that the number of withholding allowances claimed on this certificate does not exceed the number to which I am entitled or, if claiming exemption from withholding, that I am entitled to claim the exempt status.

Submit

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.

Withholding Updated Successfully. Employee will receive a notification email

OK

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**.



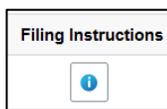
3. Click on **View Form** to view W-2

Form W-2 Wage and Tax Statement 2018		7 Social security tips	1 Wages, tips, other compensation	2 Federal income tax withheld
c Employer's name, address, and ZIP code HIGH SCH DIST		8 Allocated tips	3 Social security wages	4 Social security tax withheld
e Employee's name, address, and ZIP code		9 Verification code	5 Medicare wages and tips	6 Medicare tax withheld
		10 Dependent care benefits	11 Nonqualified plans	12a See instructions for box 12 DD
		13 Statutory employee, Retirement plan, Third party sick pay	14 Other	12b
		b Employer identification number (EIN)		12c
		a Employee's social security number		12d
15 State CA	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.
				19 Local income tax
				20 Locality name

Copy B-To Be Filed With Employee's FEDERAL Tax Return

This information is being furnished to the Internal Revenue Service.
OMB No. 1545-0008

Dept. of the Treasury - IRS
Visit the IRS website at www.irs.gov/efile.



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.

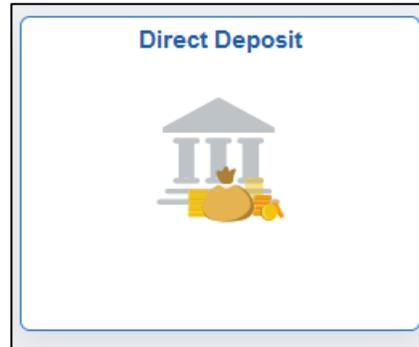
<https://sites.google.com/a/sdcoe.net/crc/resources/ess-and-general-info-training-materials>

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)	<p>Add Account.</p> <p>Row 1:</p> <ul style="list-style-type: none"> ▪ Deposit Type Remaining Balance ▪ Order (Reorder) <i>Remaining Balance</i> should always be LAST or the highest number when listing multiple accounts 	<p>Add multiple accounts. Here is an example:</p> <p>Row 1: 10%</p> <ul style="list-style-type: none"> ▪ Deposit Type = Percent ▪ Amount or Percent = 10 ▪ Order (Reorder) = 1 <p>Row 2: \$300</p> <ul style="list-style-type: none"> ▪ Deposit Type = Amount ▪ Amount or Percent = 300 ▪ Order (Reorder) = 2 <p>Row 3: Balance</p> <ul style="list-style-type: none"> ▪ Deposit Type = Remaining Balance ▪ Order (Reorder) = <i>Remaining Balance</i> should always be LAST or the highest number when listing multiple accounts

Adding Direct Deposit Account

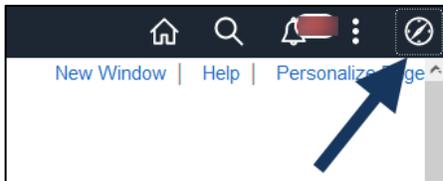
The purpose of this section is to show you how to set up a Direct Deposit Bank Account.

Important:

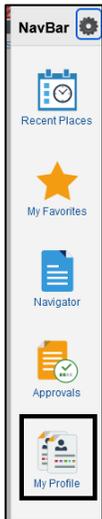
- **For Current Employees:** When there is an add/update to MFA contact phone number, the ESS Direct Deposit set up is locked for 30 days.
- **For New Hires and Rehires:** They will have **10 days** after their hire date to update their MFA contact phone number and not get locked out of ESS direct deposit.

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

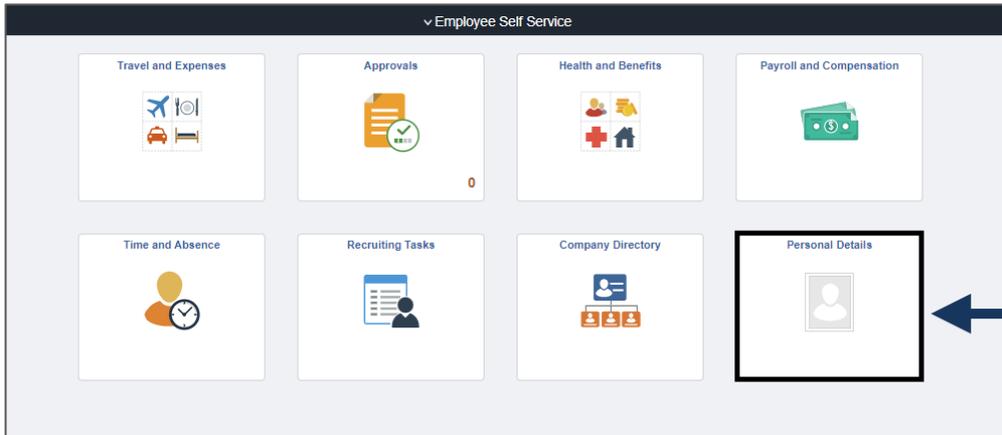


4. Check to see that you have an **email address** on file to receive notifications. Make changes as needed and click **Save**.

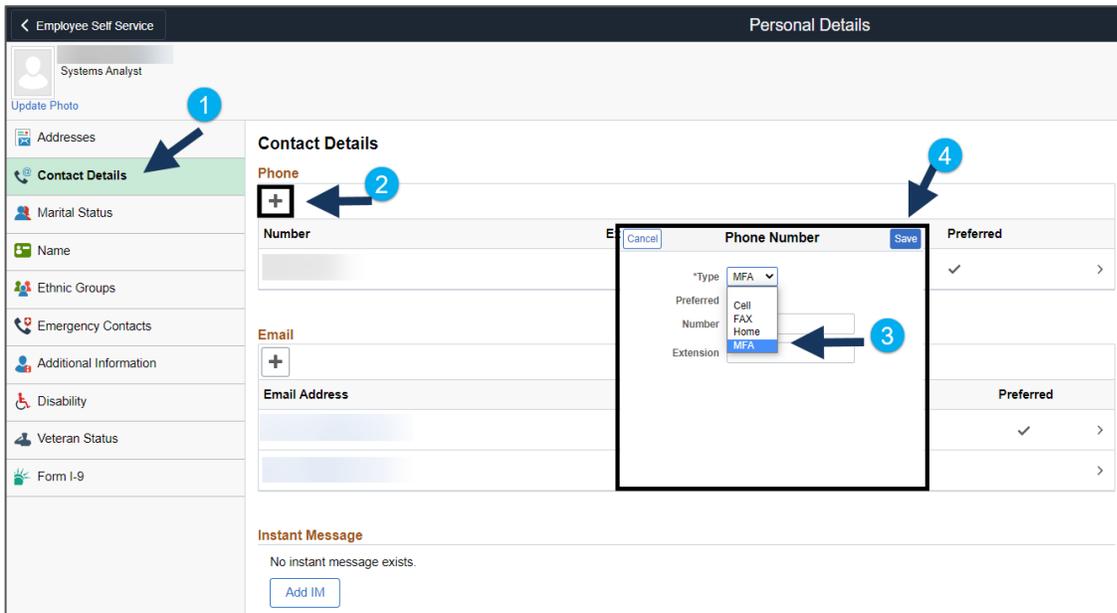
Primary Email Account	Email Type	Email Address
<input checked="" type="checkbox"/>	Business	snoop.dog@sdcoe.net

Protocol	XMPP Domain	UserID	Password
XMPP			

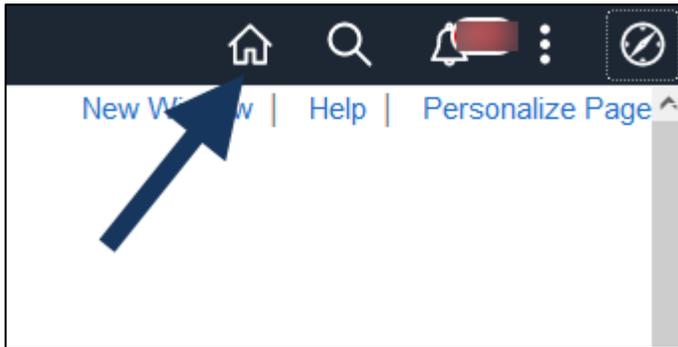
- Navigate back to the **Employee Self Service** Home page, click on the **Personal Details** tile.



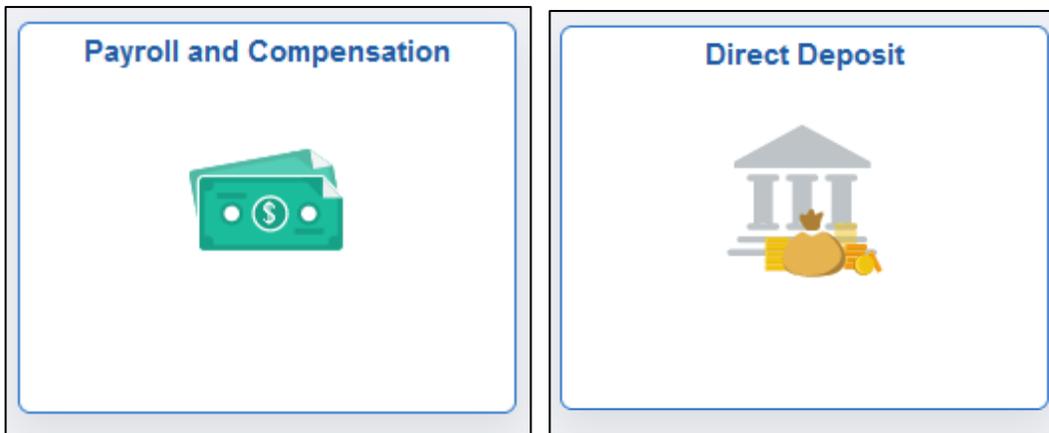
- Click Contact Details.
- Click the + to add MFA phone number.
- Click the dropdown next to *Type and select MFA.
- Enter the phone number.
- Click Save.



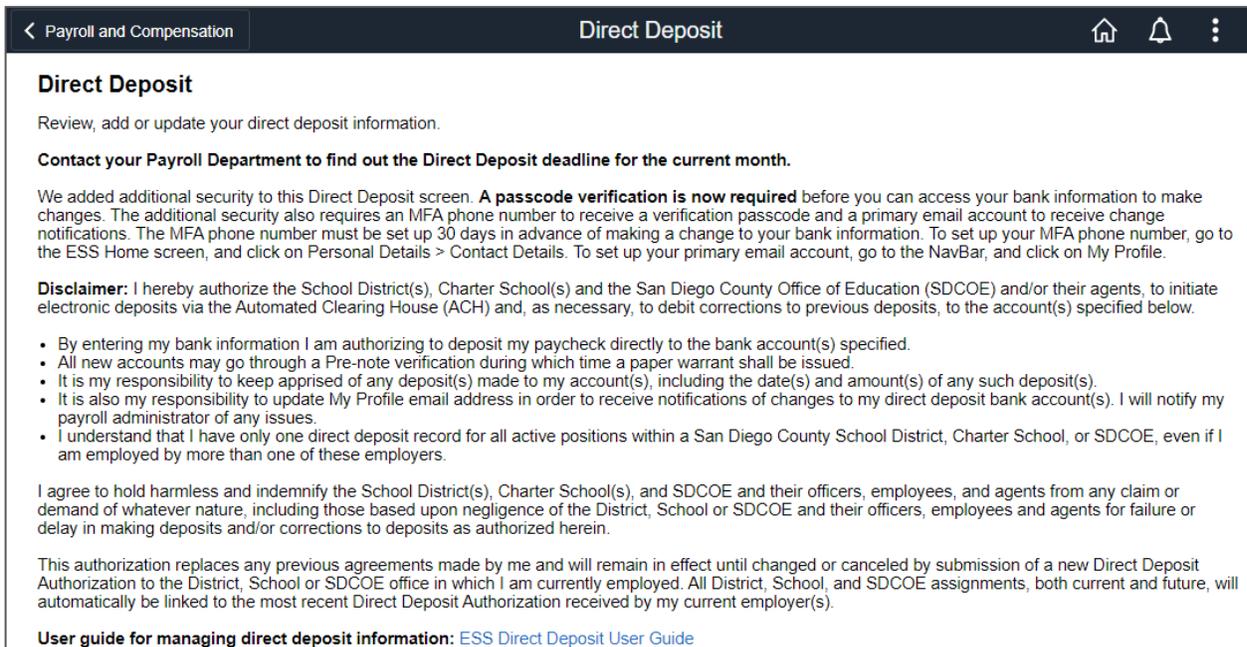
11. Click on the Home icon in the upper right corner.



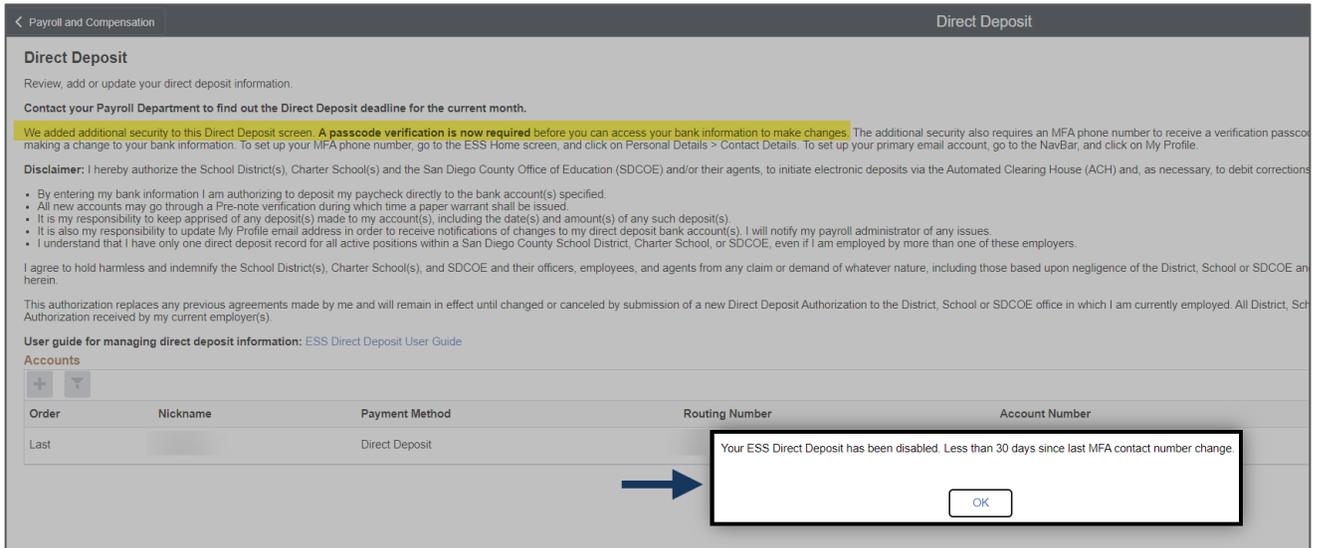
12. Click on the Payroll and Compensation tile then the Direct Deposit tile



13. Read through **Disclaimer**.



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

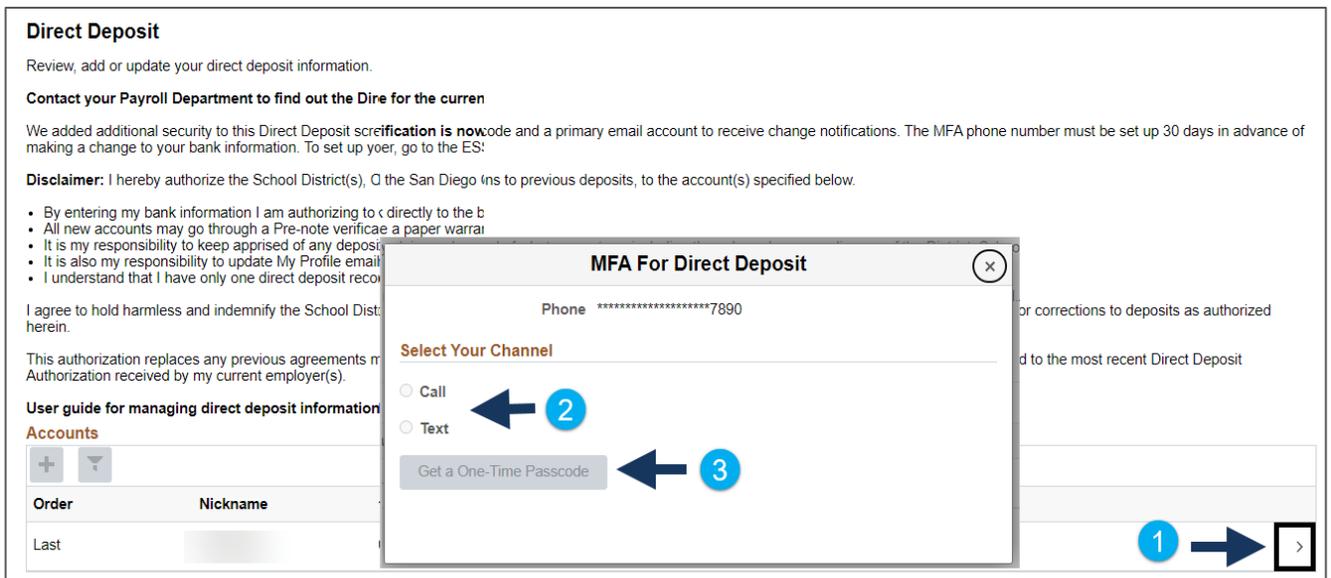


15. Once the 30-day waiting has passed, you will be able to add/change your direct deposit information by requesting and using the verification code. **Note: the code will expire after 15 minutes.**

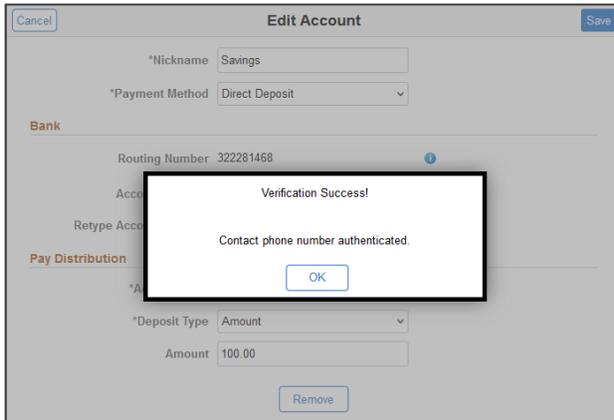
16. Click the arrow > on the Direct Deposit screen.

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

18. Click Get a One-Time Passcode.



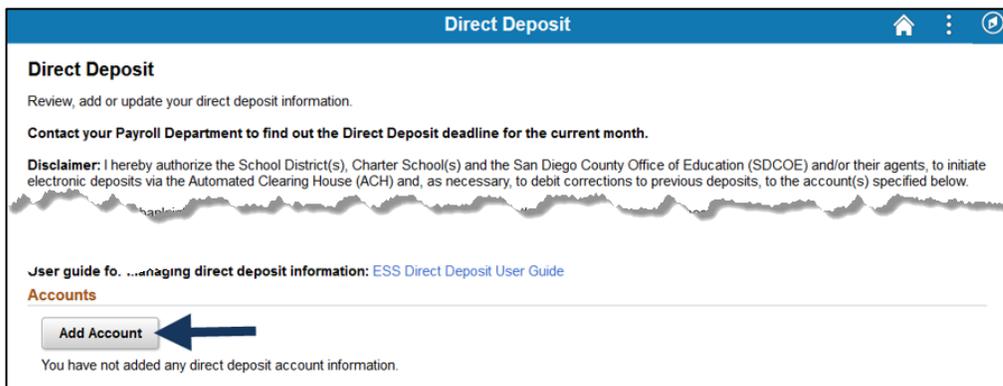
19. Once the verification code has been entered you will receive the following confirmation.



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.

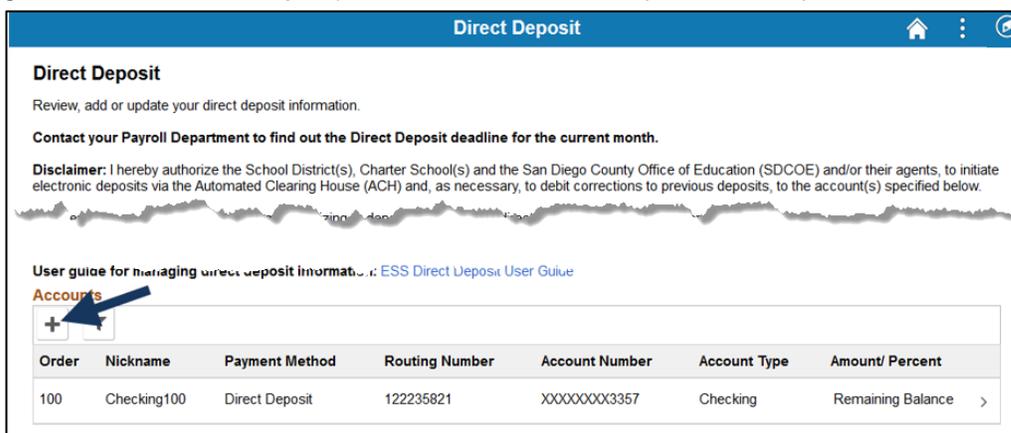
21. To **add an account**, there are 2 ways depending on whether this is first time set up.

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

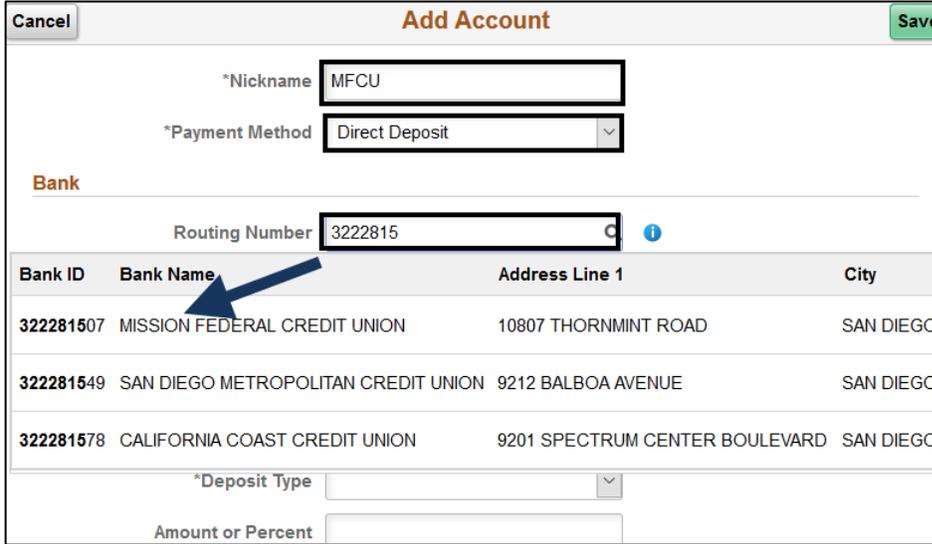


- **Add another account:** click the plus sign (+) under *Accounts*.

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:



Add Account

*Nickname: MFCU

*Payment Method: Direct Deposit

Bank

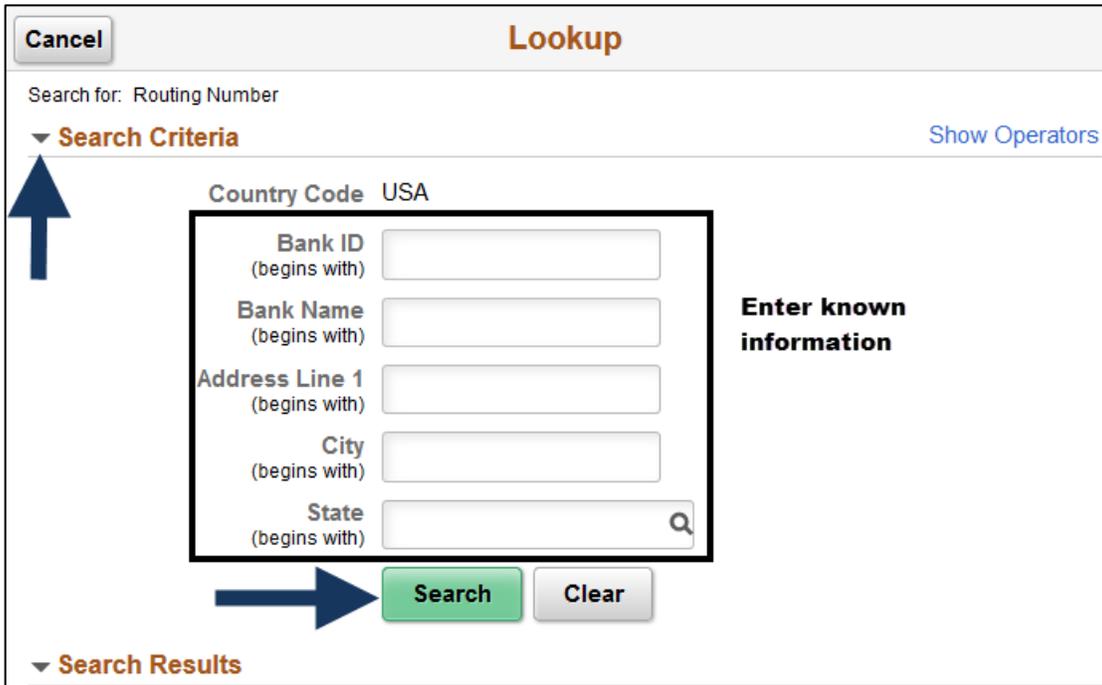
Routing Number: 3222815

Bank ID	Bank Name	Address Line 1	City
322281507	MISSION FEDERAL CREDIT UNION	10807 THORN MINT ROAD	SAN DIEGO
322281549	SAN DIEGO METROPOLITAN CREDIT UNION	9212 BALBOA AVENUE	SAN DIEGO
322281578	CALIFORNIA COAST CREDIT UNION	9201 SPECTRUM CENTER BOULEVARD	SAN DIEGO

*Deposit Type: []

Amount or Percent: []

- ***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.



Lookup

Search for: Routing Number

Search Criteria [Show Operators](#)

Country Code USA

Bank ID (begins with) []

Bank Name (begins with) []

Address Line 1 (begins with) []

City (begins with) []

State (begins with) []

Enter known information

Search Clear

Search Results

Cancel
Add Account
Save

*Nickname

*Payment Method

Bank

Routing Number i

Account Number

Retype Account Number

Pay Distribution

*Account Type

*Deposit Type



- **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.**

Primary email address is required.
Contact your Payroll Administrator for assistance.

OK
Cancel

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.

Accounts

+
▼

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
Last	MFCU	Direct Deposit	322281507	XXXX1234	Checking	Remaining Balance >

Reorder

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: [Redacted]
Date: June 23, 2020 at 8:26:04 AM PDT
To: [Redacted]
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:

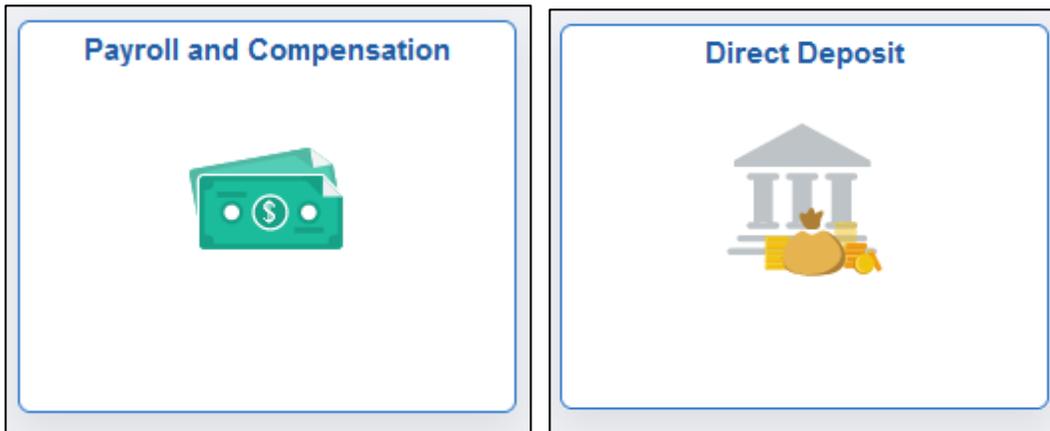
Accounts						
Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
1	SDCCU Checking	Direct Deposit	322281617	XXXX7788	Checking	10.00% >
2	MFCU Savings	Direct Deposit	322281507	XXXX4321	Savings	\$500.00 >
Last	MFCU	Direct Deposit	322281507	XXXX1234	Checking	Remaining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

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.

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	\$500.00 >
Last	MFCU	Direct Deposit		XXXX1234	Checking	Remaining Balance >

Reorder

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

Cancel
Edit Account
Save

*Nickname

*Payment Method

Bank

Routing Number i

Account Number ✎

Retype Account Number

Pay Distribution

*Account Type

*Deposit Type

Amount

Remove

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

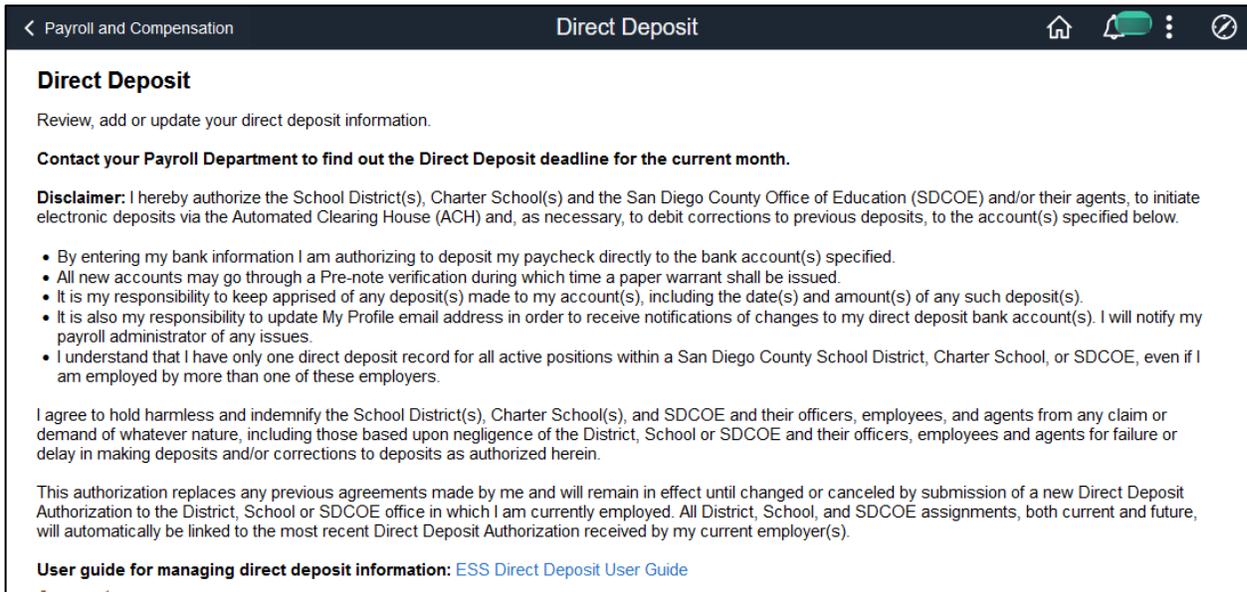
The purpose of this section is to show you how to edit the pay distribution for your Direct Deposit.

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**.



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.

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	\$500.00 >
Last	MFCU	Direct Deposit		XXXX1234	Checking	Remaining Balance >

Reorder

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

Cancel
Edit Account
Save

*Nickname

*Payment Method

Bank

Routing Number

Account Number i

Retype Account Number

Pay Distribution

*Account Type

*Deposit Type

Amount

Remove

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

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.**

Cancel
Edit Account
Save

*Nickname

*Payment Method

Bank

Routing Number 🔍 ⓘ

Account Number

Retype Account Number

Pay Distribution

*Account Type

*Deposit Type

Percent

➡

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

Are you sure you want to remove the account?

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.

If you remove this account, you can't add a new account(s) until tomorrow.

Are you sure you want to remove this account?

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 >

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 >

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	<input type="text" value="1"/>	Checking1	XXXXX3421	Remaining Balance
2	<input type="text" value="2"/>	MFCU Savings	XXXX1234	\$500.00
3	<input type="text" value="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	<input type="text" value="3"/>	Checking1	XXXXX3421	Remaining Balance
2	<input type="text" value="1"/>	MFCU Savings	XXXX1234	\$500.00
3	<input type="text" value="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	<input type="text" value="1"/>	MFCU Savings	XXXX4321	\$500.00
2	<input type="text" value="2"/>	SDCCU Checking	XXXX7788	10.00%
Last		MFCU	XXXX1234	Remaining Balance

Part IV: Health and Benefits

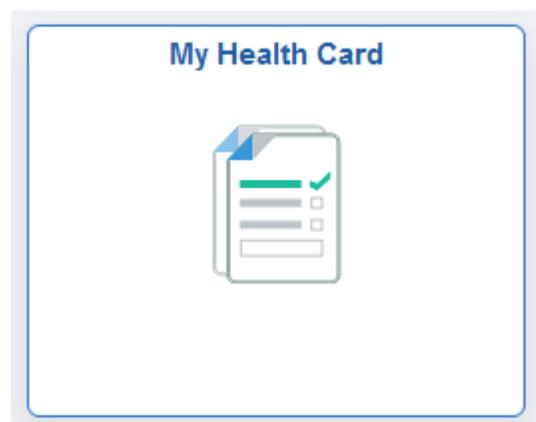
My Health Card

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](http://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:



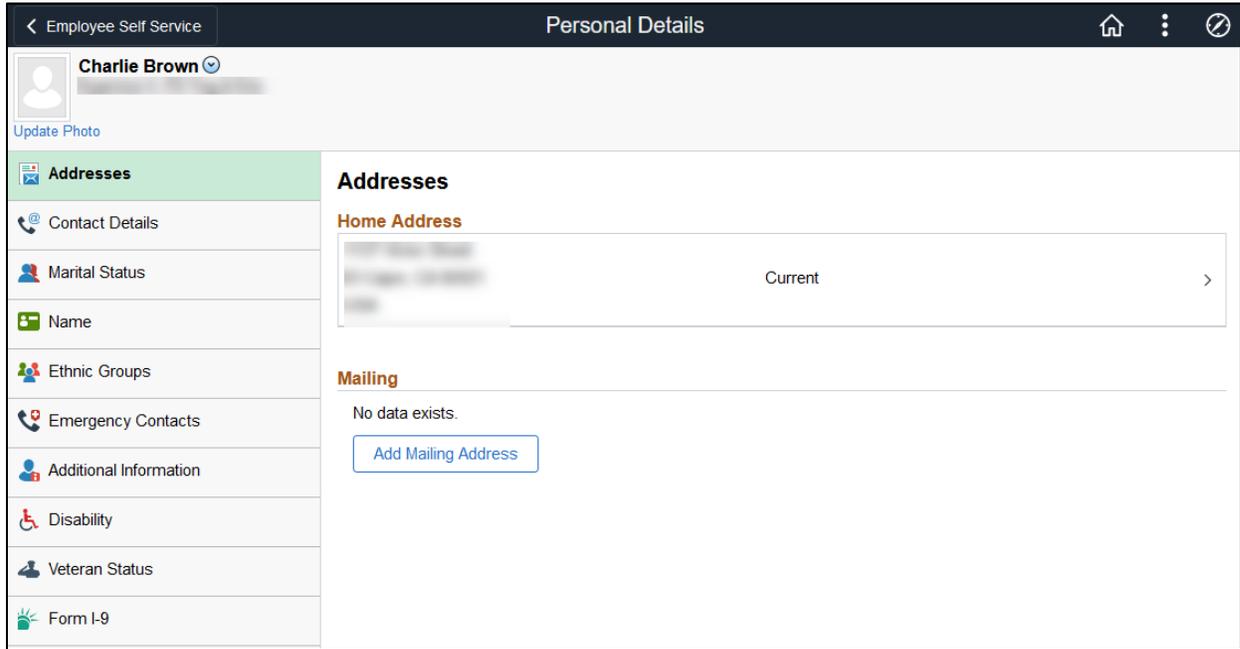
- **Addresses:** Home and mailing address
- **Contact Details:** Phone number and email address
- **Marital Status**
- **Name**
- **Ethnic Groups**
- **Emergency Contacts**
- **Additional Information**
- **Disability**
- **Veteran Status**
- **Form I-9**

Addresses: Updating Home, and Mailing Address

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



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



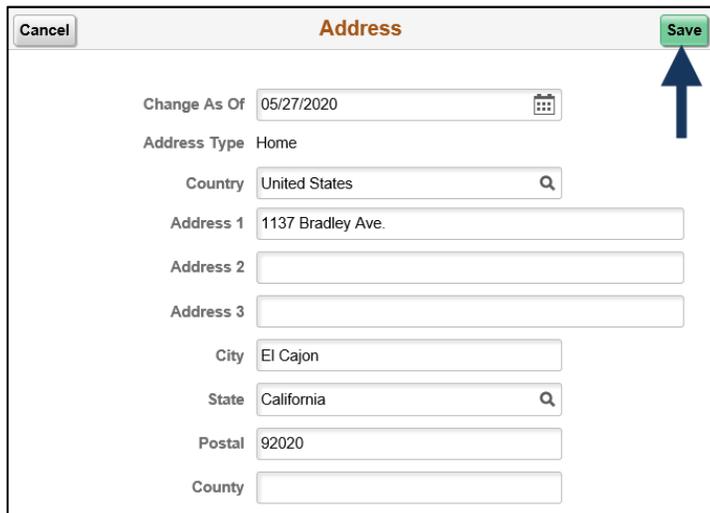
The screenshot shows the 'Personal Details' page for Charlie Brown. On the left is a navigation menu with options: Addresses (highlighted), Contact Details, Marital Status, Name, Ethnic Groups, Emergency Contacts, Additional Information, Disability, Veteran Status, and Form I-9. The main content area shows the 'Addresses' section with a 'Home Address' card containing a blurred address and the status 'Current'. Below this is a 'Mailing' section with the text 'No data exists.' and an 'Add Mailing Address' button.

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



This close-up shows the 'Home Address' card with the address: 1234 West Maple Ave, San Diego, CA 92111, USA. The status is 'Current'. A blue arrow points to a right-pointing chevron (>) button on the right side of the card.

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



The screenshot shows the 'Address' edit form. At the top left is a 'Cancel' button and at the top right is a 'Save' button. The form fields are: 'Change As Of' (05/27/2020), 'Address Type' (Home), 'Country' (United States), 'Address 1' (1137 Bradley Ave.), 'Address 2' (empty), 'Address 3' (empty), 'City' (El Cajon), 'State' (California), 'Postal' (92020), and 'County' (empty). A blue arrow points to the 'Save' button.

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

Addresses	
Home Address	
1137 Bradley Ave El Cajon, CA 92021 USA	Current >

Contact Details: Adding/Updating Phone Number(s)

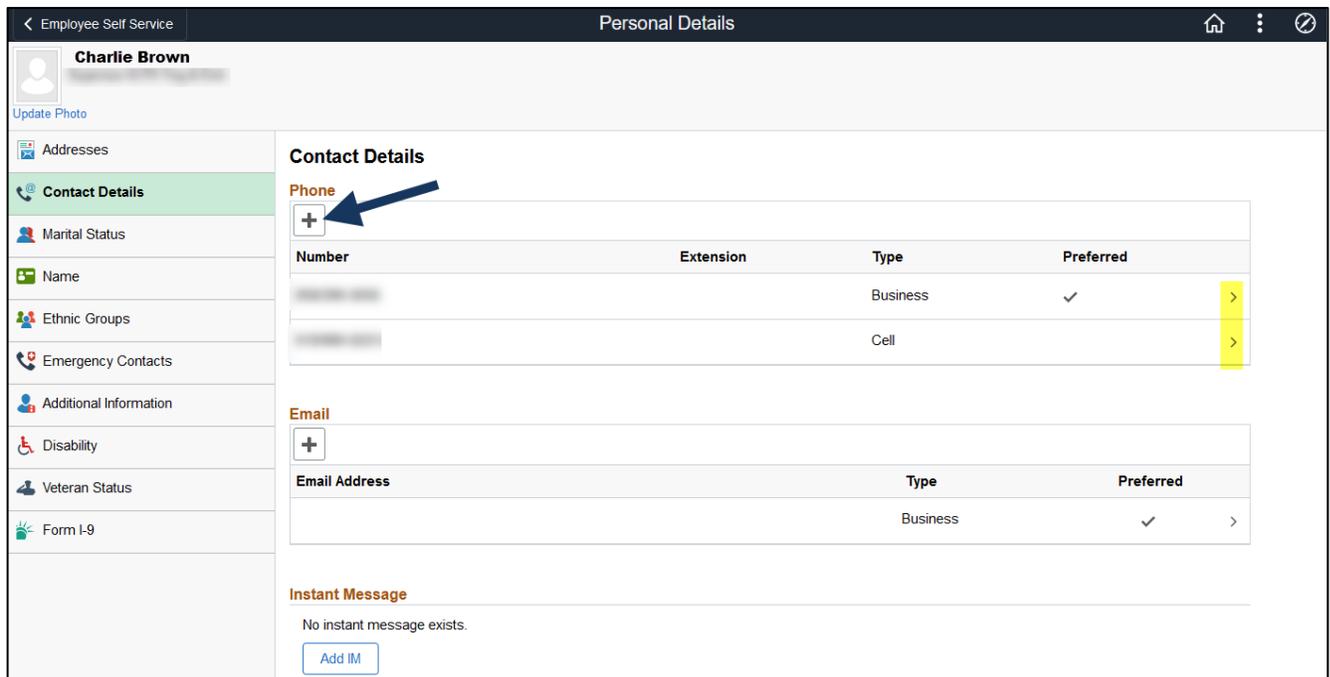
There are several Types of Phone Numbers:

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



Contact Details

Phone

Number	Extension	Type	Preferred
[Redacted]		Business	✓
[Redacted]		Cell	

Email

Email Address	Type	Preferred
[Redacted]	Business	✓

Instant Message

No instant message exists.

[Add IM](#)

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

Contact Details

Phone

+

Number	Extension	Type	Preferred
858/569-5470		Business	✓

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

Phone Number

Cancel Save

Type: Cell ↑

Preferred:

Number: 619/990-0223

Extension:

Delete ←

Phone Number

Cancel Save

*Type: MFA ↑

Preferred:

Number: 619-555-1212

Extension:

5. Click **Save** when finished.

6. New information will be listed

Contact Details

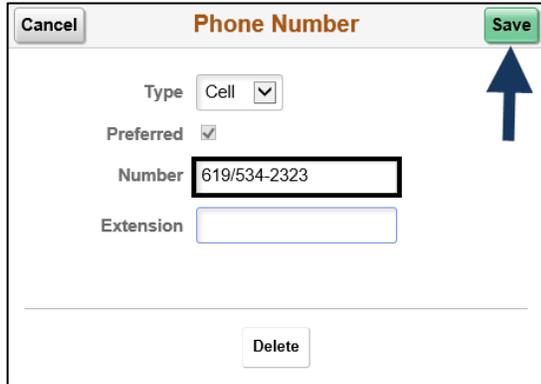
Phone

+

Number	Extension	Type	Preferred
██████████		Business	✓
██████████		Cell	
619/555-1212		MFA	

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.



Cancel Phone Number Save

Type Cell

Preferred

Number 619/534-2323

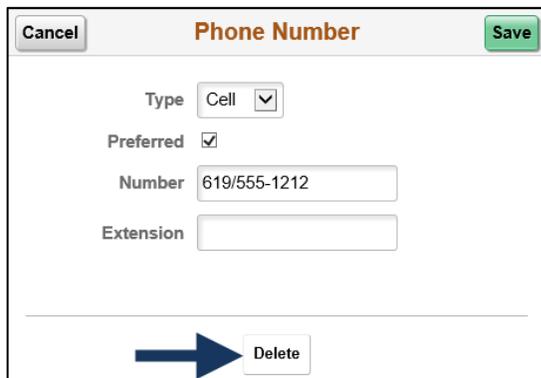
Extension

Delete

8. Change will now be listed.

Phone			
Number	Extension	Type	Preferred
858/569-5470		Business	
619/534-2323		Cell	<input checked="" type="checkbox"/>

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



Cancel Phone Number Save

Type Cell

Preferred

Number 619/555-1212

Extension

Delete

Are you sure you want to delete your "Cell" phone?

Yes No

Contact Details - Adding/Updating Email Address(es)

There are 2 places where your email address is entered:

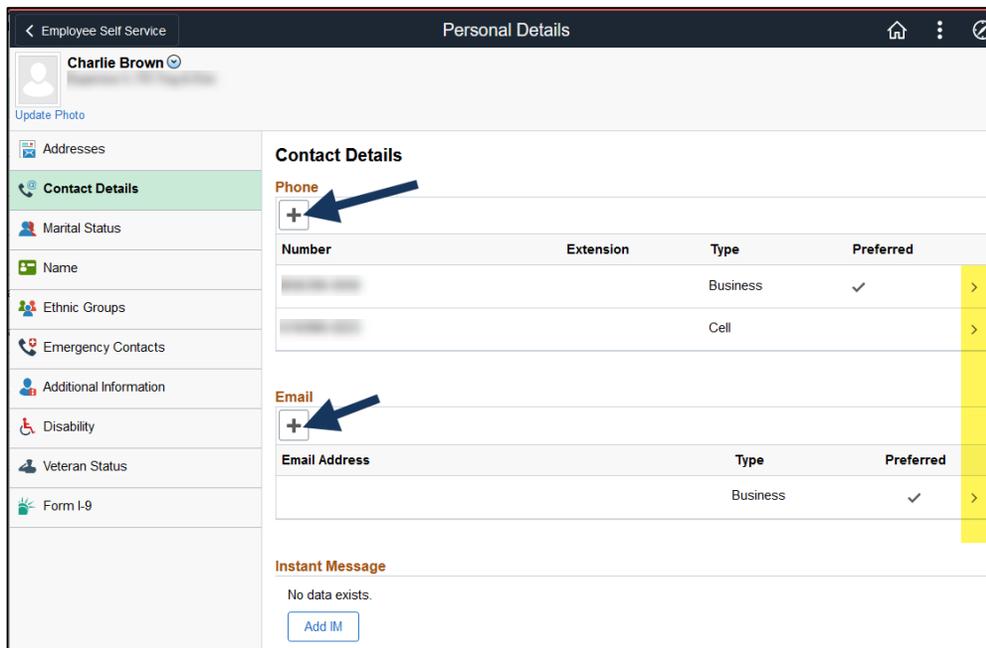
- **Personal Details** > Contact Details > Email
- NavBar > **My Profile** > Email (this email needs to be in place for ESS Direct Deposit change verification)

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

Cancel
Email Address
Save

*Email Type Other ▾

Preferred

Email Address LukeSkywalker@StarWars.com



5. Click **Save** when finished.

6. New information will be listed

Email

+

Email Address	Type	Preferred	
	Business	<input checked="" type="checkbox"/>	>
LukeSkywalker@StarWars.com	Other	<input type="checkbox"/>	>

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.

Cancel
Email Address
Save

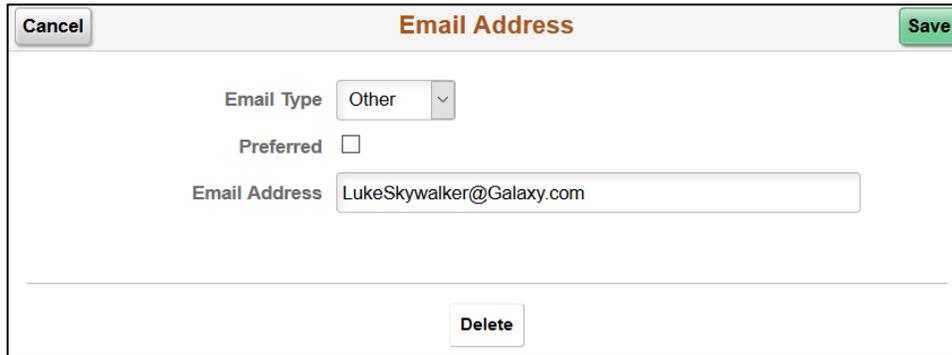
Email Type Other ▾

Preferred

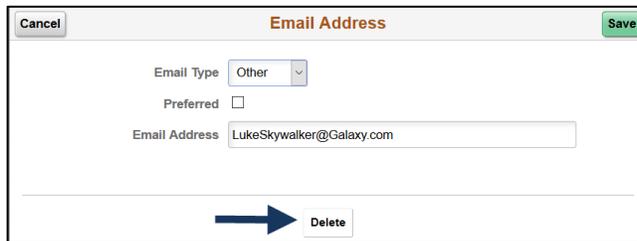
Email Address LukeSkywalker@Galaxy.com

Delete

8. Change will now be listed.

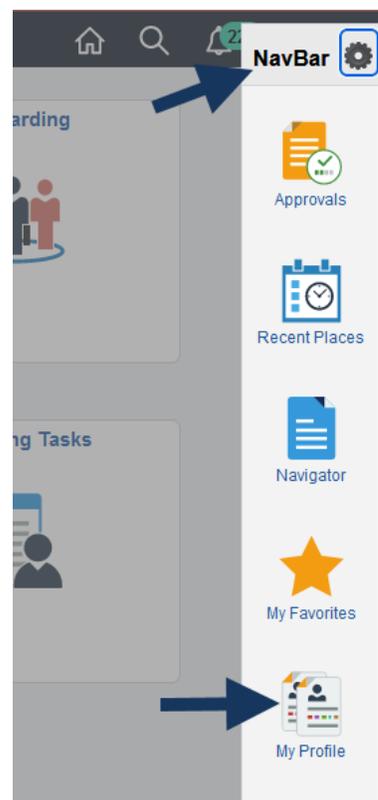
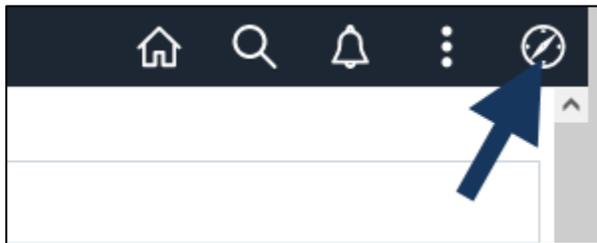


9. To remove an email, **click >** and then **Delete**. Message will appear, select Yes or No.




My Profile

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



- Click enter email information or click Add in the Email area

< View All Notifications
General Profile Information

Password

[Change password](#)
[Change or set up forgotten password help](#)

Personalizations

My preferred language for PIA web pages is: English

My preferred language for reports and email is: English ▼

Currency Code: 🔍

Default Mobile Page: ⋮ 🔍

Alternate User

If you will be temporarily unavailable, you can select an alternate user to receive your routings.

Alternate User ID: 🔍

From Date: 📅 (example: 12/31/2000)

To Date: 📅 (example: 12/31/2000)

Workflow Attributes

Email User Worklist User

Miscellaneous User Links

Email 

📄 🔍
⏪ ⏩ 1-1 of 1 ▼ ⏪ ⏩

Primary Email Account	Email Type	Email Address		
<input type="checkbox"/>	 ▼	 	+	-



- Select Email Type and enter Email Address.

Email

📄 🔍
⏪ ⏩ 1-1 of 1 ▼ ⏪ ⏩

Primary Email Account	Email Type	Email Address		
<input type="checkbox"/>	Business ▼	lukeskywalker@galaxy.com ⋮	+	-

4. Click Save.

Email

Primary Email Account	Email Type	Email Address		
<input type="checkbox"/>	Business	lukeskywalker@galaxy.com	+	-

IM Information

Protocol	XMPP Domain	UserID	Password		
XMPP				+	-

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.

Employee Self Service Personal Details



Charlie Brown

Update Photo

Marital Status

Current Unknown

Change Marital Status

*New Status

*As Of

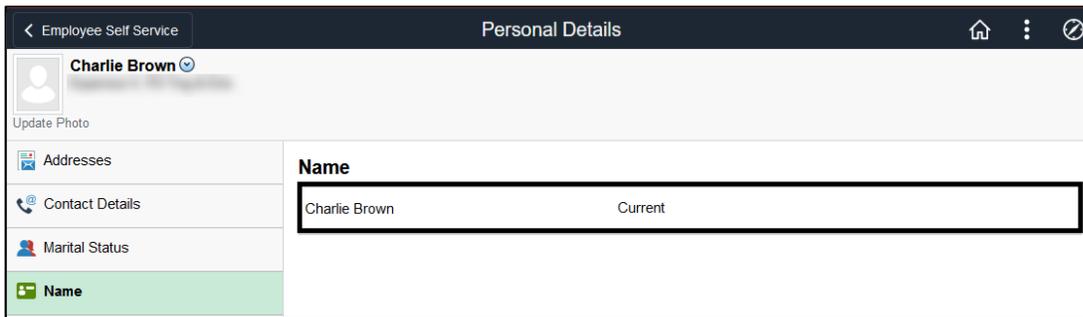
Save

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.

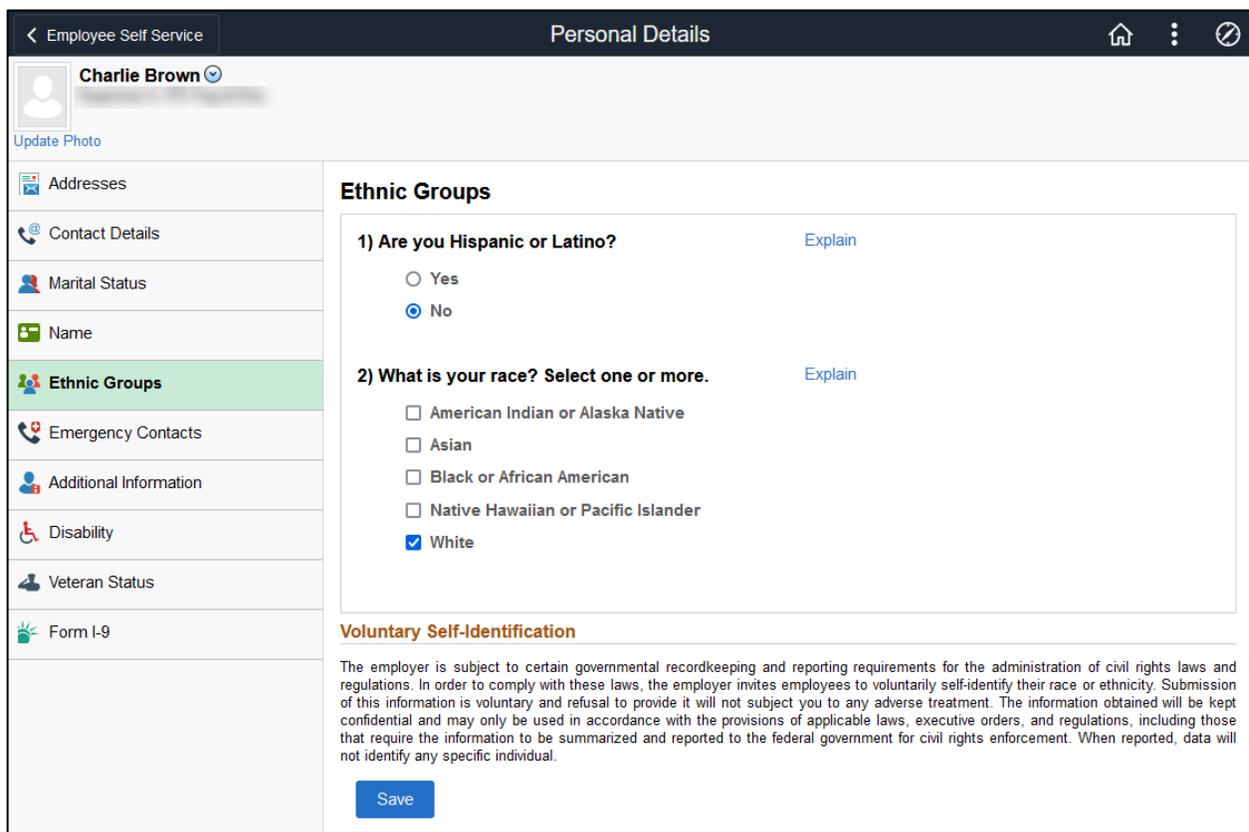


Ethnic Groups

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



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



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

Ethnic Groups

1) Are you Hispanic or Latino? [Explain](#)

Yes

No

2) What is your race? Select one or more. [Explain](#)

American Indian or Alaska Native

Asian

Black or African American

Native Hawaiian or Pacific Islander

White

Voluntary Self-Identification

The employer is subject to certain governmental recordkeeping and reporting requirements for the administration of civil rights laws and regulations. In order to comply with these laws, the employer invites employees to voluntarily self-identify their race or ethnicity. Submission of this information is voluntary and refusal to provide it will not subject you to any adverse treatment. The information obtained will be kept confidential and may only be used in accordance with the provisions of applicable laws, executive orders, and regulations, including those that require the information to be summarized and reported to the federal government for civil rights enforcement. When reported, data will not identify any specific individual.

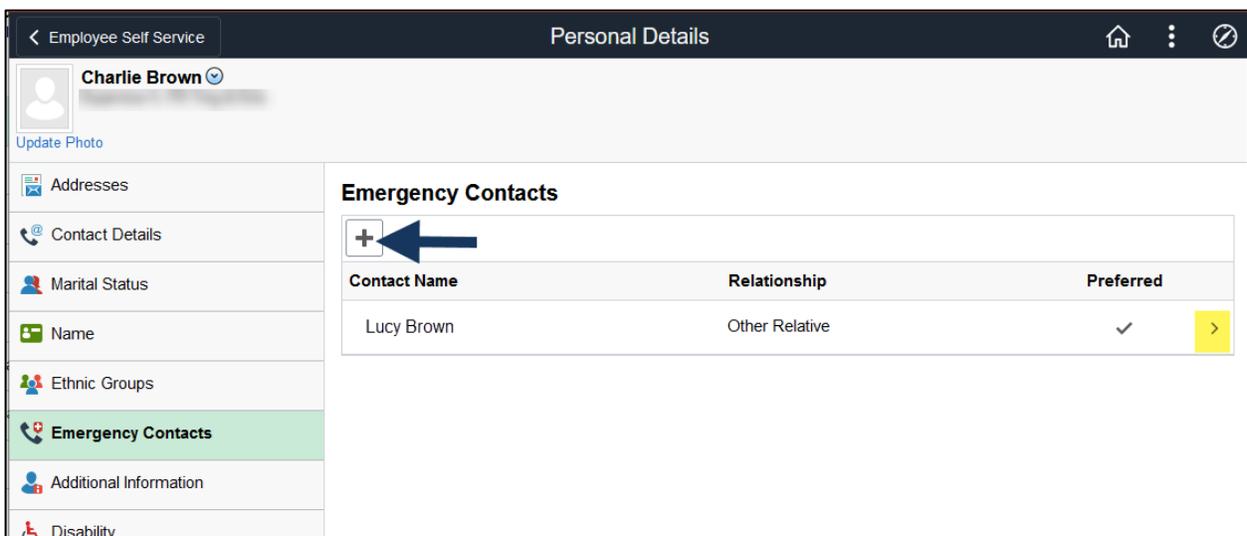
[Save](#)

Emergency Contacts

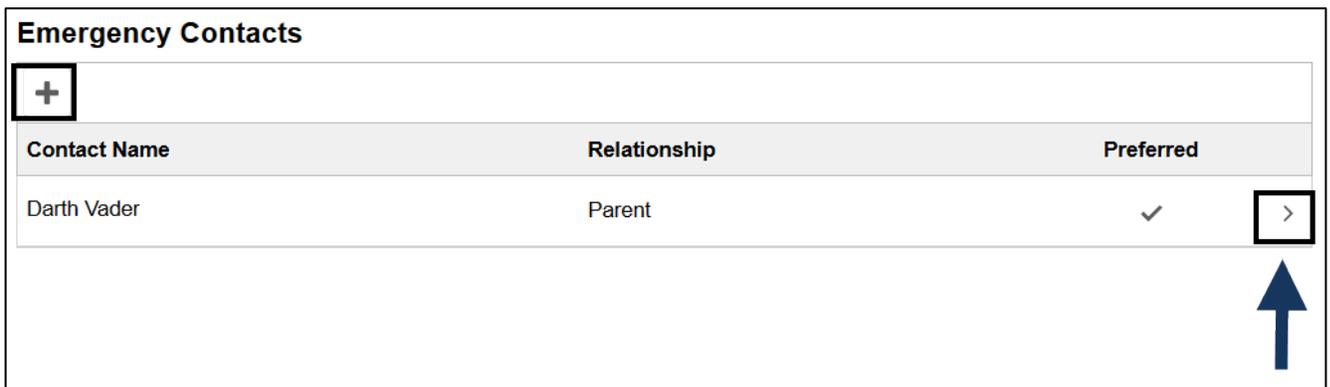
1. On the **Employee Self Service** Home page, click on the **Personal Details** tile.



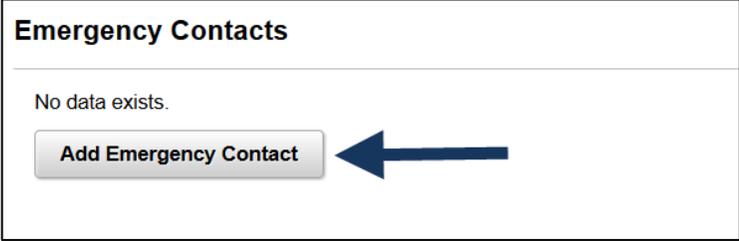
2. Choose **Emergency Contacts** to add or update.



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



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



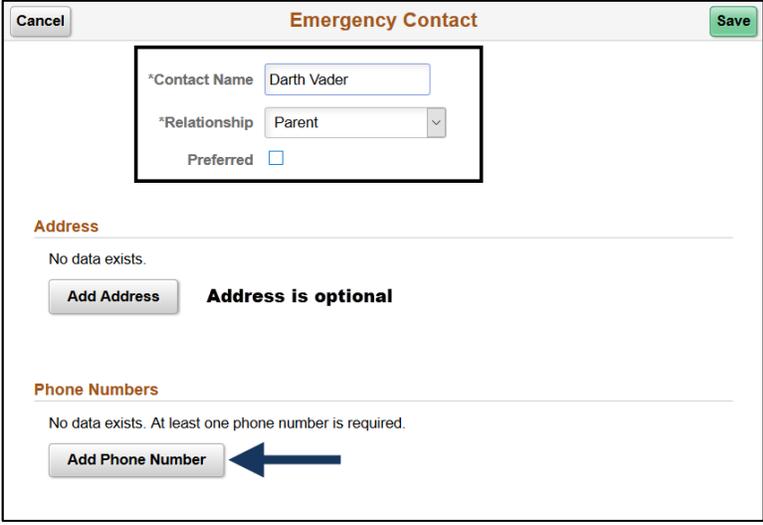
Emergency Contacts

No data exists.

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



Emergency Contact [Cancel] [Save]

*Contact Name:

*Relationship:

Preferred

Address

No data exists.

Add Address **Address is optional**

Phone Numbers

No data exists. At least one phone number is required.

Add Phone Number ←

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



Phone Number [Cancel] [Done]

Same as mine

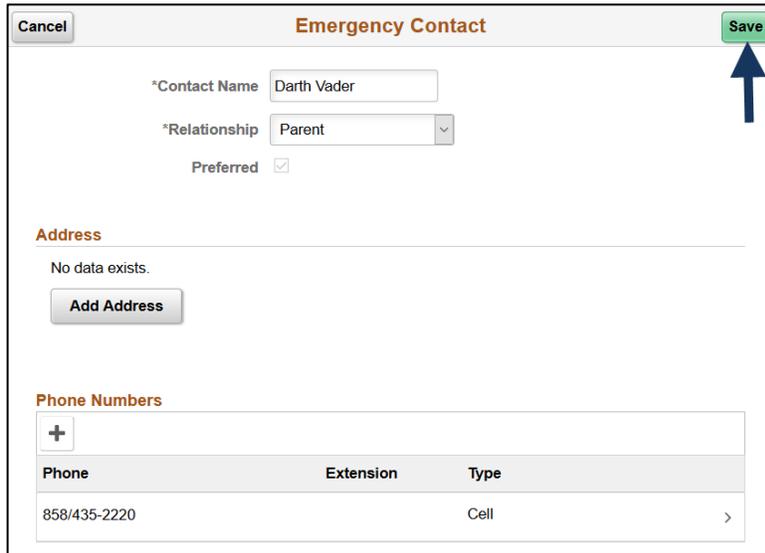
*Type:

*Number:

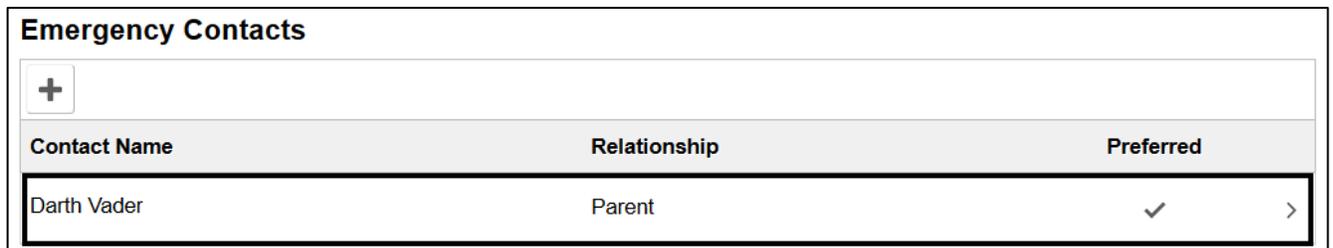
Extension:

6. Click **Done** when finished.

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



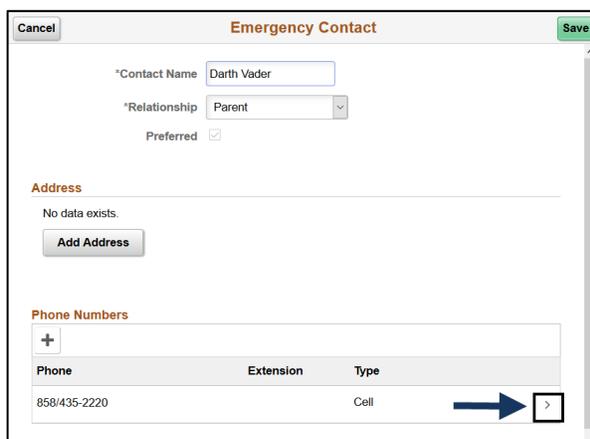
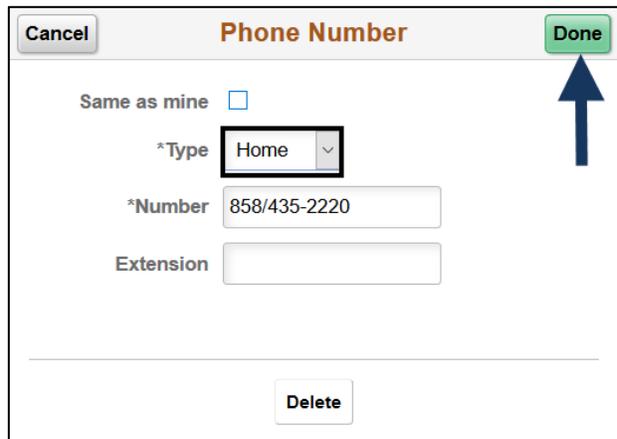
8. New information will be listed



Contact Name	Relationship	Preferred	
Darth Vader	Parent	<input checked="" type="checkbox"/>	>

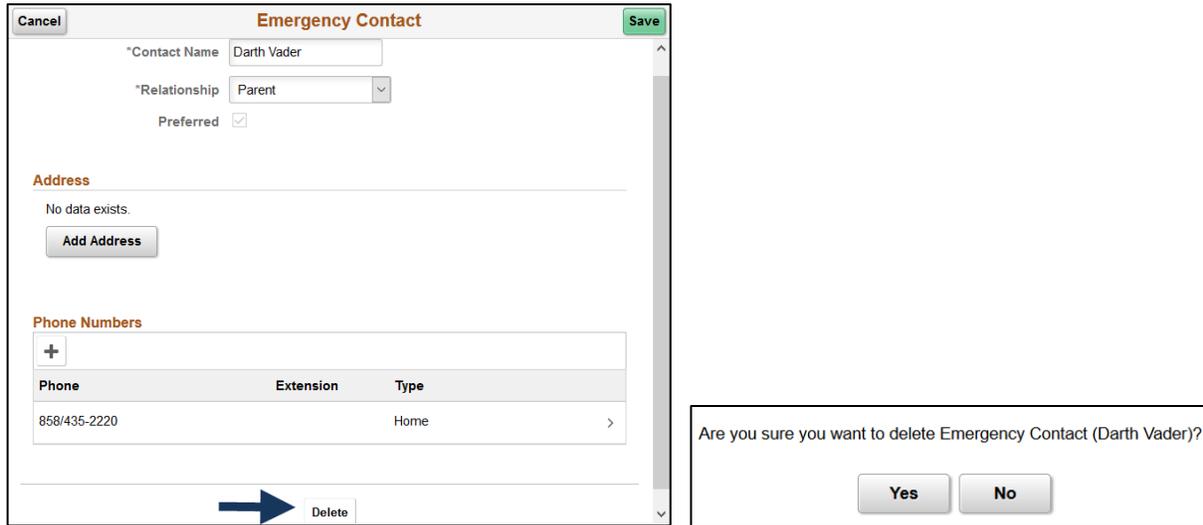
9. To **Edit** emergency contacts, **click >**. Make changes to name. **Click >** by phone number to make changes. Click **Done**. Then click **Save**

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.



The screenshot shows the 'Emergency Contact' form with the following details:

- Contact Name: Darth Vader
- Relationship: Parent
- Preferred:
- Address: No data exists. Add Address button.
- Phone Numbers:

Phone	Extension	Type
858/435-2220		Home

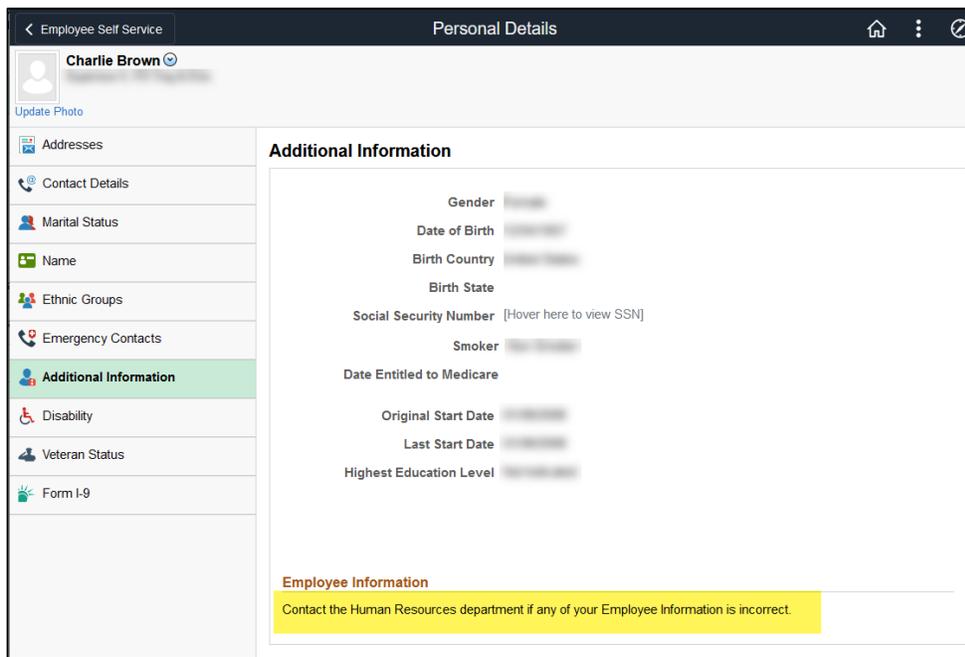
A blue arrow points to the 'Delete' button at the bottom of the form. To the right, a confirmation dialog box asks: 'Are you sure you want to delete Emergency Contact (Darth Vader)?' with 'Yes' and 'No' buttons.

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.



The screenshot shows the 'Personal Details' page for Charlie Brown. The 'Additional Information' section is highlighted and contains the following fields:

- Gender
- Date of Birth
- Birth Country
- Birth State
- Social Security Number [Hover here to view SSN]
- Smoker
- Date Entitled to Medicare
- Original Start Date
- Last Start Date
- Highest Education Level

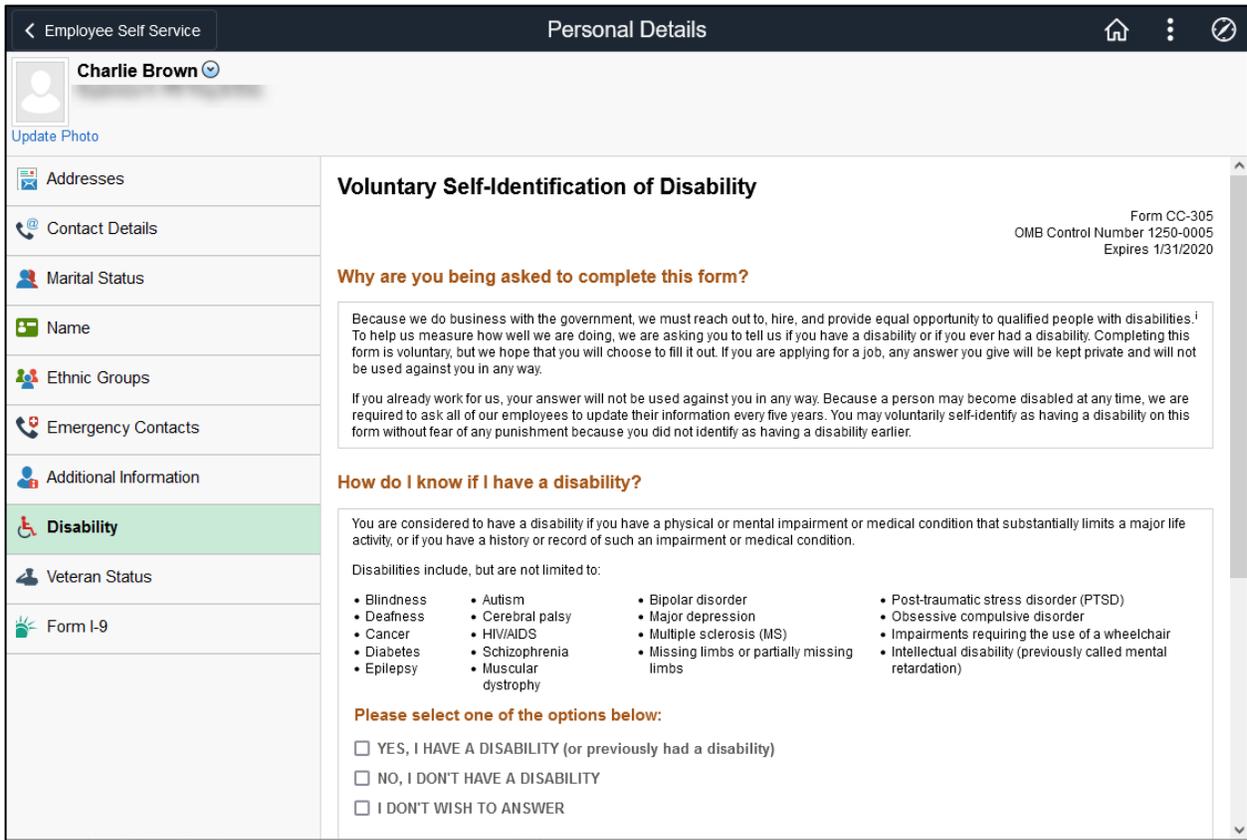
At the bottom, there is a yellow highlighted box with the text: 'Employee Information. Contact the Human Resources department if any of your Employee Information is incorrect.'

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).



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

Voluntary Self-Identification of Disability

Form CC-305
OMB Control Number 1250-0005
Expires 1/31/2020

Why are you being asked to complete this form?

Because we do business with the government, we must reach out to, hire, and provide equal opportunity to qualified people with disabilities.¹ To help us measure how well we are doing, we are asking you to tell us if you have a disability or if you ever had a disability. Completing this form is voluntary, but we hope that you will choose to fill it out. If you are applying for a job, any answer you give will be kept private and will not be used against you in any way.

If you already work for us, your answer will not be used against you in any way. Because a person may become disabled at any time, we are required to ask all of our employees to update their information every five years. You may voluntarily self-identify as having a disability on this form without fear of any punishment because you did not identify as having a disability earlier.

How do I know if I have a disability?

You are considered to have a disability if you have a physical or mental impairment or medical condition that substantially limits a major life activity, or if you have a history or record of such an impairment or medical condition.

Disabilities include, but are not limited to:

- Blindness
- Deafness
- Cancer
- Diabetes
- Epilepsy
- Autism
- Cerebral palsy
- HIV/AIDS
- Schizophrenia
- Muscular dystrophy
- Bipolar disorder
- Major depression
- Multiple sclerosis (MS)
- Missing limbs or partially missing limbs
- Post-traumatic stress disorder (PTSD)
- Obsessive compulsive disorder
- Impairments requiring the use of a wheelchair
- Intellectual disability (previously called mental retardation)

Please select one of the options below:

YES, I HAVE A DISABILITY (or previously had a disability)

NO, I DON'T HAVE A DISABILITY

I DON'T WISH TO ANSWER

Reasonable Accommodation Notice

Federal law requires employers to provide reasonable accommodation to qualified individuals with disabilities. Please tell us if you require a reasonable accommodation to apply for a job or to perform your job. Examples of reasonable accommodation include making a change to the application process or work procedures, providing documents in an alternate format, using a sign language interpreter, or using specialized equipment.

¹Section 503 of the Rehabilitation Act of 1973, as amended. For more information about this form or the equal employment obligations of Federal contractors, visit the U.S. Department of Labor's Office of Federal Contract Compliance Programs (OFCCP) website at www.dol.gov/ofccp.

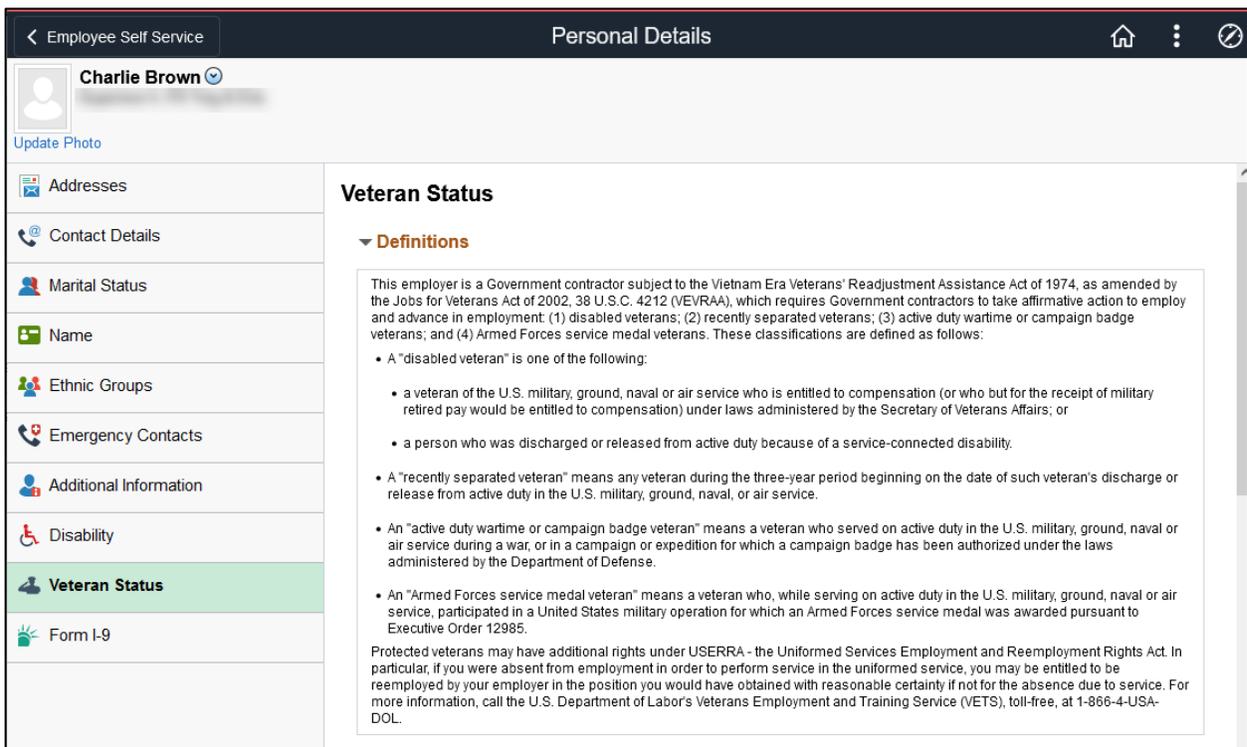
PUBLIC BURDEN STATEMENT: According to the Paperwork Reduction Act of 1995 no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. This survey should take about 5 minutes to complete.

Veteran's Status

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



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



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

Veteran Status

▼ Definitions

This employer is a Government contractor subject to the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended by the Jobs for Veterans Act of 2002, 38 U.S.C. 4212 (VEVRAA), which requires Government contractors to take affirmative action to employ and advance in employment: (1) disabled veterans; (2) recently separated veterans; (3) active duty wartime or campaign badge veterans; and (4) Armed Forces service medal veterans. These classifications are defined as follows:

- A "disabled veteran" is one of the following:
 - a veteran of the U.S. military, ground, naval or air service who is entitled to compensation (or who but for the receipt of military retired pay would be entitled to compensation) under laws administered by the Secretary of Veterans Affairs; or
 - a person who was discharged or released from active duty because of a service-connected disability.
- A "recently separated veteran" means any veteran during the three-year period beginning on the date of such veteran's discharge or release from active duty in the U.S. military, ground, naval, or air service.
- An "active duty wartime or campaign badge veteran" means a veteran who served on active duty in the U.S. military, ground, naval or air service during a war, or in a campaign or expedition for which a campaign badge has been authorized under the laws administered by the Department of Defense.
- An "Armed Forces service medal veteran" means a veteran who, while serving on active duty in the U.S. military, ground, naval or air service, participated in a United States military operation for which an Armed Forces service medal was awarded pursuant to Executive Order 12985.

Protected veterans may have additional rights under USERRA - the Uniformed Services Employment and Reemployment Rights Act. In particular, if you were absent from employment in order to perform service in the uniformed service, you may be entitled to be reemployed by your employer in the position you would have obtained with reasonable certainty if not for the absence due to service. For more information, call the U.S. Department of Labor's Veterans Employment and Training Service (VETS), toll-free, at 1-866-4-USA-DOL.

Self-Identification

As a Government contractor subject to VEVRAA, we are required to submit a report to the United States Department of Labor each year identifying the number of our employees belonging to each specified "protected veteran" category. If you believe you belong to any of the categories of protected veterans listed above, please indicate by selecting the appropriate option below.

I belong to the following classifications of protected veterans (choose all that apply):

- Disabled Veteran
- Recently Separated Veteran
- Active Duty Wartime or Campaign Badge Veteran
- Armed Forces Service Medal Veteran

I am a protected veteran, but I choose not to self-identify the classifications to which I belong.

I am NOT a protected veteran.

I am NOT a veteran.

Military Discharge Date

Reasonable Accommodation Notice

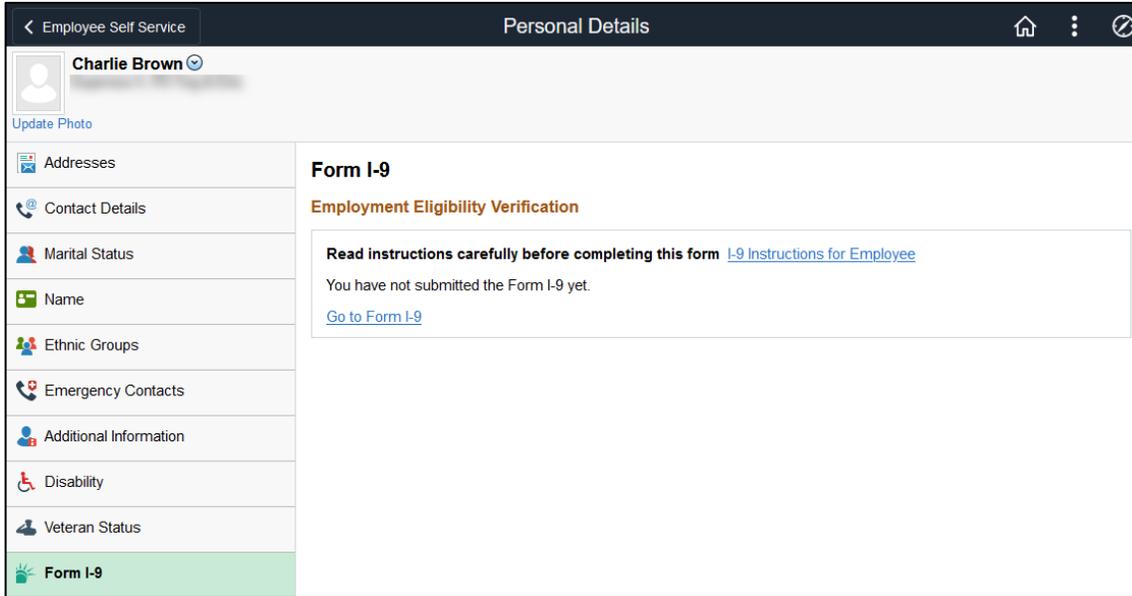
If you are a disabled veteran it would assist us if you tell us whether there are accommodations we could make that would enable you to perform the essential functions of the job, including special equipment, changes in the physical layout of the job, changes in the way the job is customarily performed, 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.



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

< Health and Benefits
Health Care Summary

Health Care Summary

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

07/13/2022 

Benefits Summary

Type of Benefit	Plan Description	Coverage or Participation
Medical	UHC Performance Network 1	Employee Only
Dental	Delta Dental Premiere \$2500 AT	Employee Only
Vision	VSP Veba After Tax	Employee Only

[Health Care Dependent Summary](#)

Health Care Dependent Summary

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

Health and Benefits



Health Care Dependent Summ...



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

< Health and Benefits
Health Care Dependent Summary

Health Care Dependent Summary

Use the link to view your dependents by their name or type of benefit.

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

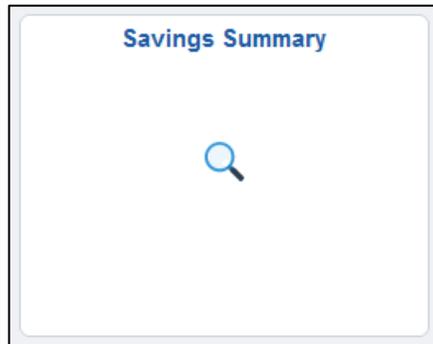
07/13/2022 

[Dependent's Summary by Name](#)

You have no benefit enrollments as of the date entered.

Savings Summary

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



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

< Health and Benefits
 Savings Summary

Savings Summary

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

Benefits Summary

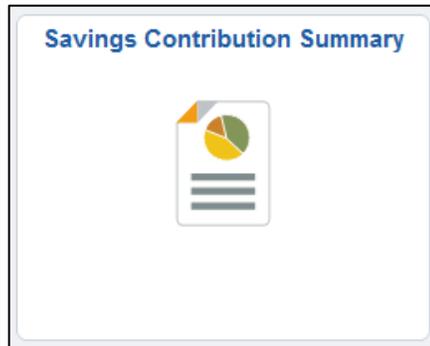
Type of Benefit	Plan Description	Coverage or Participation
403(b) Employee Paid	403(b) Employee Paid TSA	\$500 Before Tax
Section 457		Waived
403(b) Roth		Waived

[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.

< Health and Benefits
Savings Contribution Summary

Savings Contribution Summary

Barbara Thiss

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

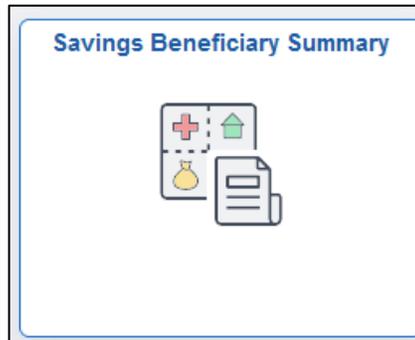
07/13/2022

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.

< Health and Benefits
Savings Beneficiary Summary

Savings Beneficiary Summary

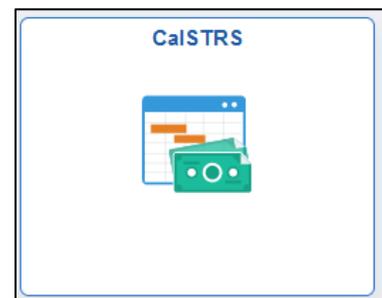
Barbara Thiss

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

No dependent/beneficiary enrollments were found.

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	●	●

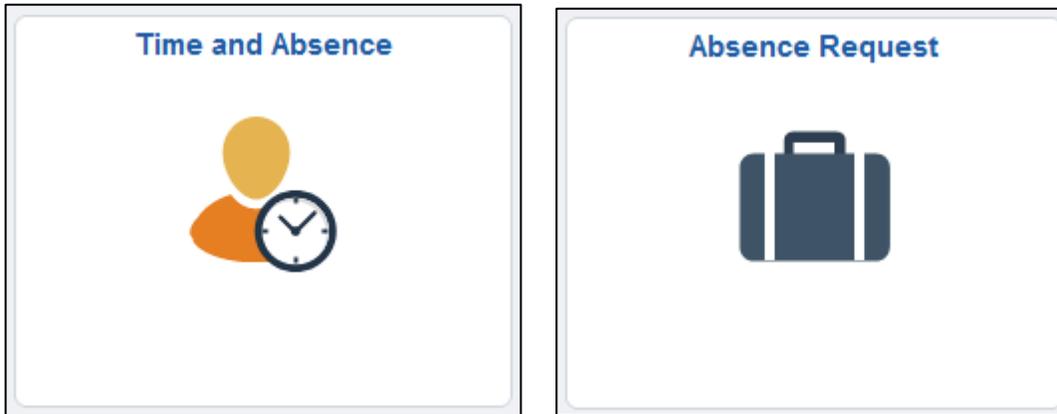
- Edit: You can edit a request when it is saved (both future and past dates) or returned to you by your manager (pushed back or denied, both future and past dates).
- Cancel: You can cancel a request when it is saved (both future and past dates), submitted and not yet approved (future date), submitted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

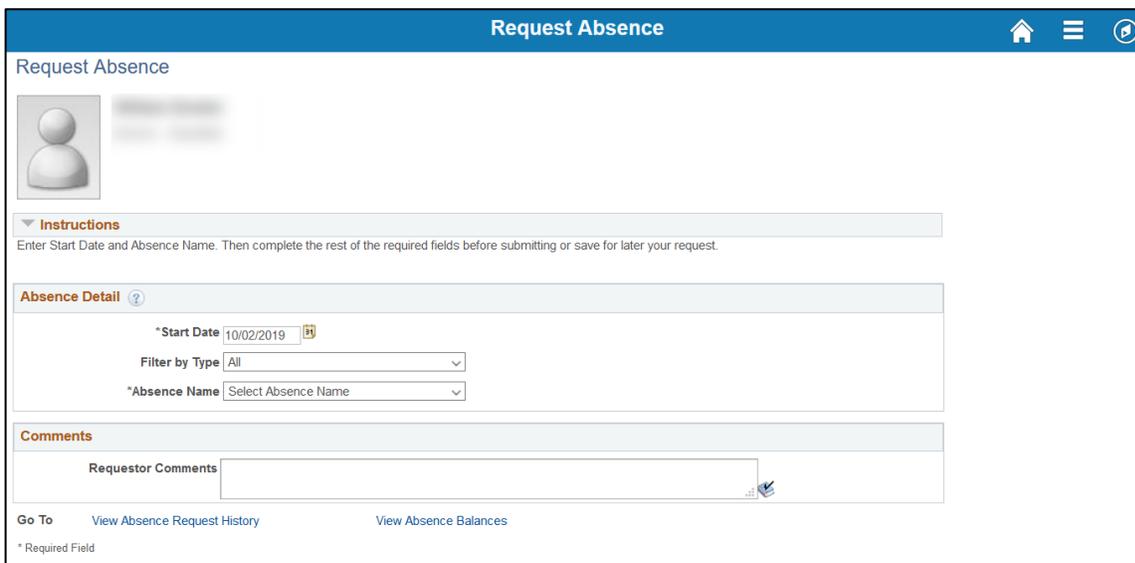
A: Your debited hours will be returned the next day. A nightly process needs to run to update the hours in your absence balances.

Entering Absence Request Screen

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

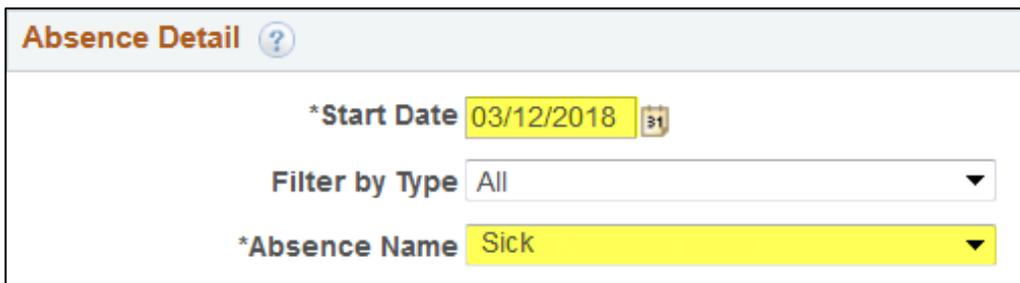


2. *Request Absence* screen opens. To enter your absence, refer to **How to Request Absence** on p. Error! Bookmark not defined..



The screenshot shows the 'Request Absence' web application interface. At the top, there is a blue header with the title 'Request Absence' and navigation icons. Below the header, there is a user profile section with a placeholder image and name. A section titled 'Instructions' provides guidance: 'Enter Start Date and Absence Name. Then complete the rest of the required fields before submitting or save for later your request.' The 'Absence Detail' section contains three required fields: '*Start Date' (with a calendar icon and the value '10/02/2019'), 'Filter by Type' (a dropdown menu set to 'All'), and '*Absence Name' (a dropdown menu set to 'Select Absence Name'). Below this is a 'Comments' section with a text area for 'Requestor Comments'. At the bottom, there are links for 'Go To', 'View Absence Request History', and 'View Absence Balances'. A note at the bottom left indicates '* Required Field'.

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



This close-up screenshot shows the 'Absence Detail' form fields. The '*Start Date' field is highlighted in yellow and contains the value '03/12/2018' with a calendar icon. The 'Filter by Type' dropdown menu is set to 'All'. The '*Absence Name' dropdown menu is highlighted in yellow and set to 'Sick'.

- **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**.

Absence Detail ?

*Start Date 31

End Date 31

Original Start Date 31

Filter by Type ▼

*Absence Name ▼

Reason ▼

Partial Days ▼

Duration X Hours

Current Balance 244.00 Hours**

- **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.

Duration ← Hours **THE DURATION WILL CALCULATE**

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.

Completed Successfully!
Date Time: March 12, 2018 at 10:41 ← **SUCCESS = YOU HAVE ENOUGH OF THAT ABSENCE TYPE AVAILABLE**

[View Forecast Details](#)

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

Comments

Requestor Comments **[OPTIONAL]**

Go To [View Absence Request History](#) [View Absence Balances](#)

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**.

[Request Absence](#)

Submit Confirmation

Are you sure you want to Submit this Absence Request?

9. Click **OK**.

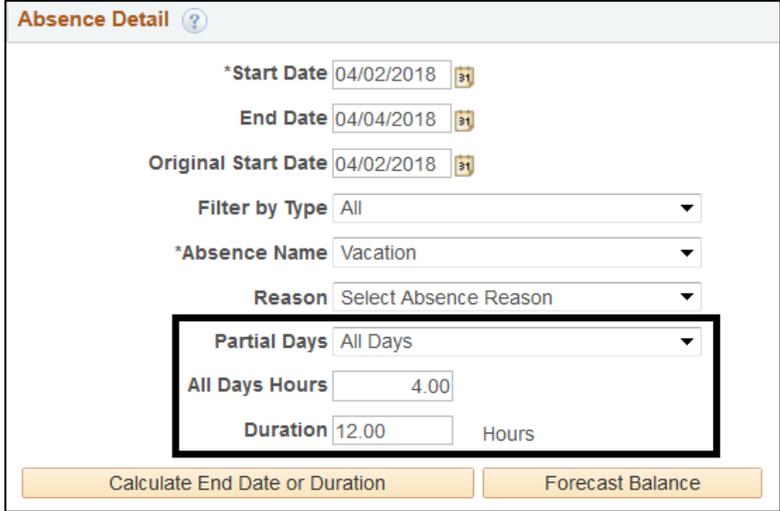
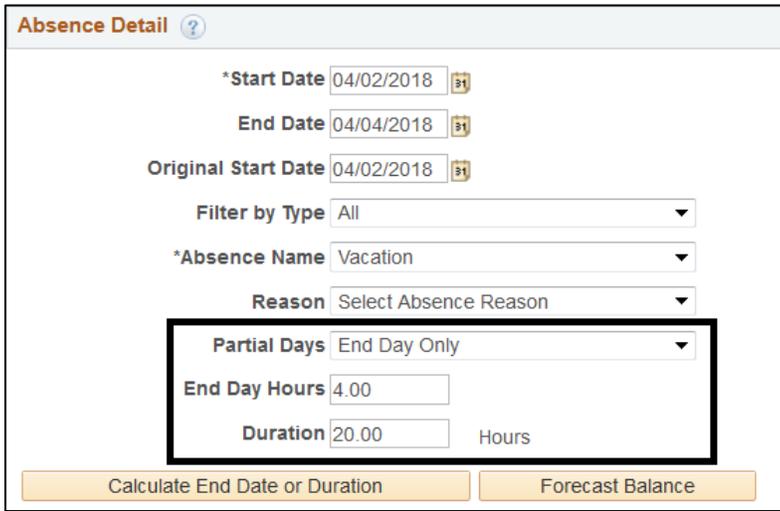
The absence request is now submitted, which sends an email message to your manager and also adds the request to his/her worklist. If desired, click **Home** to return to the home screen

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.

If you need to request...	Enter it like this...
<p>Full days off, no partials (MOST CIRCUMSTANCES)</p> <p><i>Example: Hank's regular work schedule is 8 hours per day. He is taking 3 full days (24 hours) of sick leave.</i></p>	<p>NONE (Default)</p> <div data-bbox="537 520 1284 953" style="border: 1px solid black; padding: 5px;"> <p>Absence Detail ?</p> <p>*Start Date 04/02/2018</p> <p>End Date 04/04/2018</p> <p>Original Start Date 04/02/2018</p> <p>Filter by Type All</p> <p>*Absence Name Sick</p> <p>Reason Select Absence Reason</p> <p>Partial Days None</p> <p>Duration 24.00 Hours</p> <p>Calculate End Date or Duration Forecast Balance</p> </div> <p>F. Partial Days = None (Default)</p> <p>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.</p>
<p>A few hours off during one work day (MANY CIRCUMSTANCES)</p> <p><i>Example: Hank's regular work schedule is 8 hours per day. He is taking 2 hours of personal necessity.</i></p>	<p>ALL DAYS (OR START DAY ONLY)</p> <div data-bbox="537 1155 1284 1612" style="border: 1px solid black; padding: 5px;"> <p>Absence Detail ?</p> <p>*Start Date 04/02/2018</p> <p>End Date 04/02/2018</p> <p>Filter by Type All</p> <p>*Absence Name Personal Necessity</p> <p>Reason Select Absence Reason</p> <p>Partial Days All Days</p> <p>All Days Hours 2.00</p> <p>Duration 2.00 Hours</p> <p>Calculate End Date or Duration Forecast Balance</p> </div> <p>H. Partial Days = All Days (or you can select <i>Start Day Only</i> – when applied to one day, both do the same thing)</p> <p>I. All Days Hours = 2.0</p> <p>J. Duration = Do nothing. It will be calculated by taking the All Days Hours (2) x the number of days taken (1) = 2 hrs.</p>

If you need to request...	Enter it like this...
<p>Consecutive half days off</p> <p><i>Example: Hank's regular work schedule is 8 hours per day. He is taking 3 half-days (12 hours) of vacation.</i></p>	<p>ALL DAYS</p> <div data-bbox="532 352 1312 863">  <p>The screenshot shows the 'Absence Detail' form with the following fields: *Start Date (04/02/2018), End Date (04/04/2018), Original Start Date (04/02/2018), Filter by Type (All), *Absence Name (Vacation), Reason (Select Absence Reason), Partial Days (All Days), All Days Hours (4.00), and Duration (12.00 Hours). The 'Partial Days' dropdown and the 'All Days Hours' and 'Duration' fields are highlighted with a black box.</p> </div> <p>K. Partial Days = <i>All Days</i></p> <p>L. All Days Hours = 4.0</p> <p>M. Duration = Do nothing. It will be calculated by taking the All Days Hours (4) x the number of days taken (3) = 12 hrs.</p>
<p>Partial day at end of leave</p> <p><i>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).</i></p>	<p>END DAY ONLY</p> <div data-bbox="532 1066 1312 1577">  <p>The screenshot shows the 'Absence Detail' form with the following fields: *Start Date (04/02/2018), End Date (04/04/2018), Original Start Date (04/02/2018), Filter by Type (All), *Absence Name (Vacation), Reason (Select Absence Reason), Partial Days (End Day Only), End Day Hours (4.00), and Duration (20.00 Hours). The 'Partial Days' dropdown and the 'End Day Hours' and 'Duration' fields are highlighted with a black box.</p> </div> <p>N. Partial Days = <i>End Day Only</i>. The Partial Hours only apply to the End Date (within a range).</p> <p>O. End Day Hours = 4.0</p> <p>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.</p>

If you need to request...	Enter it like this...
<p>Partial day at beginning of leave</p> <p><i>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).</i></p>	<p>START DAY ONLY</p> <div data-bbox="532 352 1318 871" style="border: 1px solid black; padding: 5px;"> <p>Absence Detail ?</p> <p>*Start Date <input type="text" value="04/02/2018"/> </p> <p>End Date <input type="text" value="04/04/2018"/> </p> <p>Original Start Date <input type="text" value="04/02/2018"/> </p> <p>Filter by Type <input type="text" value="All"/></p> <p>*Absence Name <input type="text" value="Vacation"/></p> <p>Reason <input type="text" value="Select Absence Reason"/></p> <div style="border: 2px solid black; padding: 5px; margin: 5px 0;"> <p>Partial Days <input type="text" value="Start Day Only"/></p> <p>Start Day Hours <input type="text" value="4.00"/></p> <p>Duration <input type="text" value="20.00"/> Hours</p> </div> <p style="text-align: center;"> <input type="button" value="Calculate End Date or Duration"/> <input type="button" value="Forecast Balance"/> </p> </div> <p>Q. Partial Days = Start Day Only. The Partial Hours only apply to the Start Date (within a range).</p> <p>R. Start Day Hours = 4.0</p> <p>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.</p>
<p>Partial day at beginning and end of leave</p> <p><i>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).</i></p>	<p>START AND END DAYS</p> <div data-bbox="532 1144 1193 1354" style="border: 2px solid black; padding: 5px;"> <p>Partial Days <input type="text" value="Start and End Days"/></p> <p>Start Day Hours <input type="text" value="4.00"/></p> <p>End Day Hours <input type="text" value="4.00"/></p> <p>Duration <input type="text" value="16.00"/> Hours</p> </div> <p>T. Partial Days = Start and End Days. The Partial Hours only apply to the Start Date and End Date (within a range).</p> <p>U. Start Day Hours = 4.0</p> <p>V. End Day Hours = 4.0</p> <p>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.</p>

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	31	Through		06/10/2018	31	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		

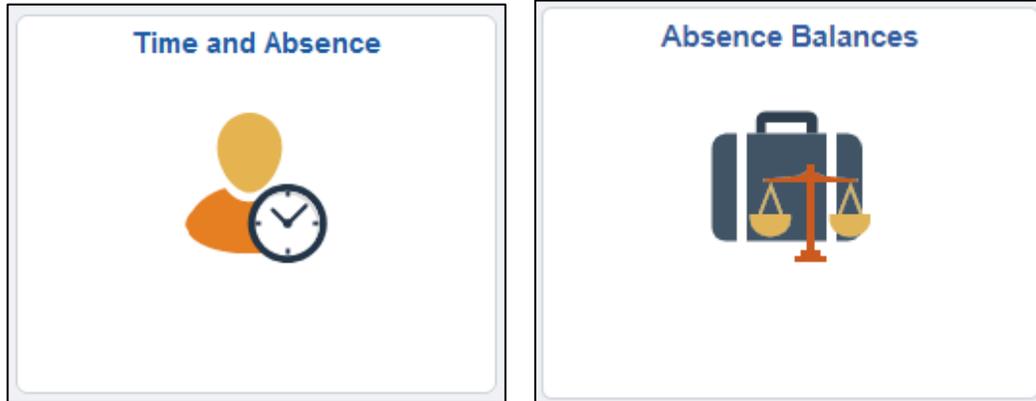
3. Make any necessary changes, then submit for approval.

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.

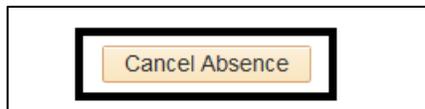
1. Click on the **Time and Absence** tile then the **Absence Request History** tile.



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		Through						Refresh				
12/12/2017		06/10/2018						Refresh				
Absence Request History								Personalize Find View All [Print] [Calendar]		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**.

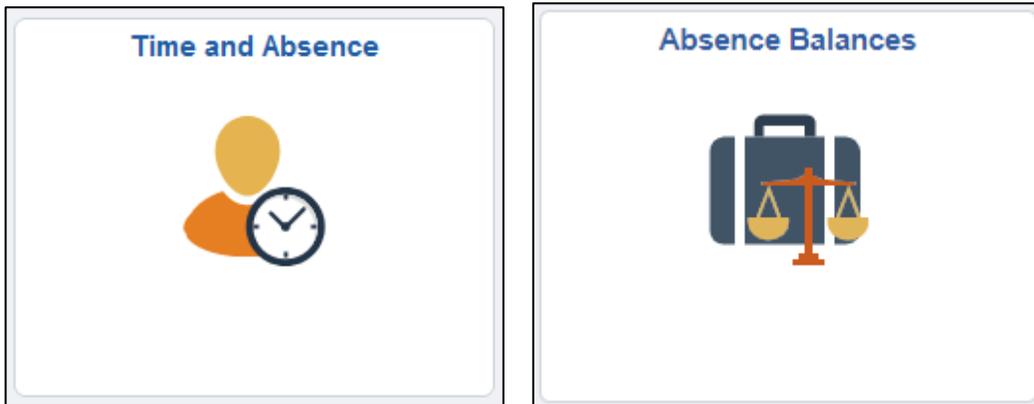


4. You should see a message that says, “Are you sure you want to Cancel this Absence Request?” Click **Yes**. This will cancel the absence request.
5. A confirmation message will appear that says, “The Absence Request was successfully canceled.” Click **OK**.
 - An email message regarding the cancelation 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!

Forecast Balance

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

Forecast Balance Details Personalize |

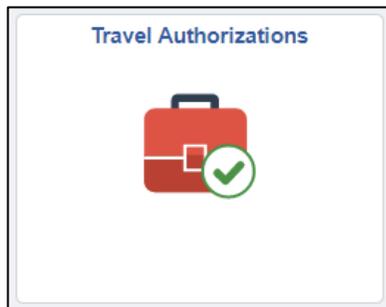
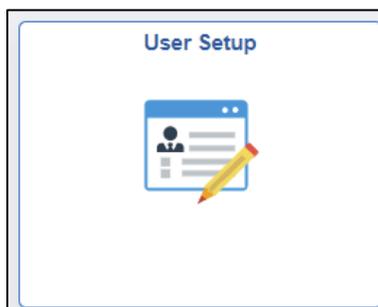
Forecast results appear here

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)

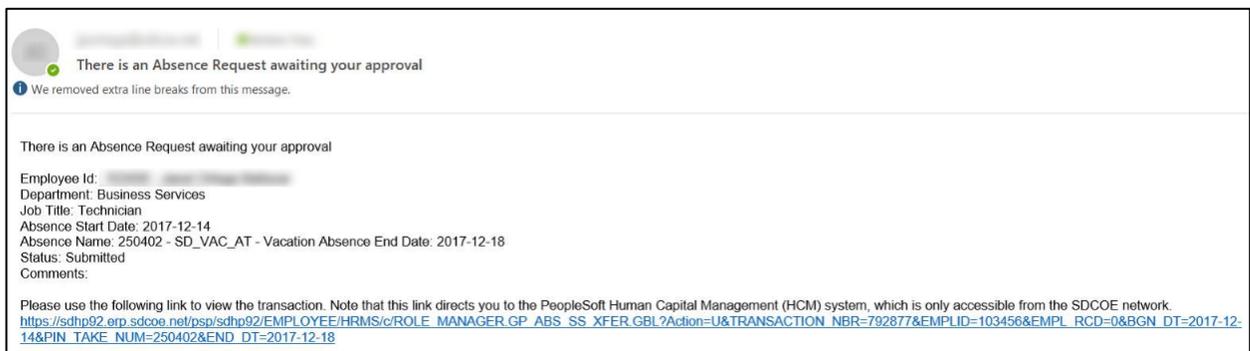
USED BY SDCOE ONLY

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

OPTION 1: Link in Email

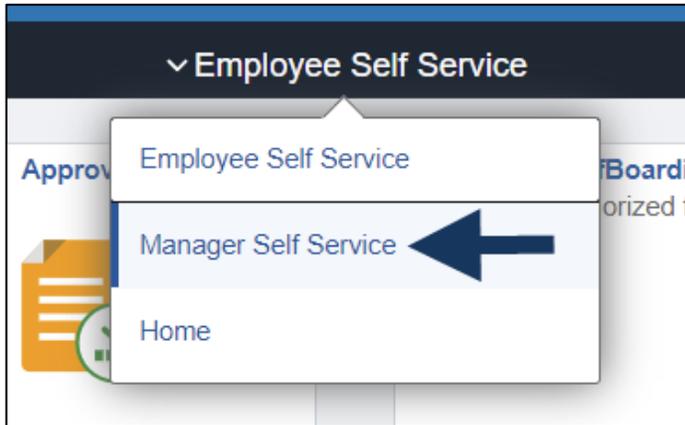
1. You will receive an email message from the employee's email address indicating that there is an absence request to approve. To approve the absence, you have three options:
2. Click the link in the email message.

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.

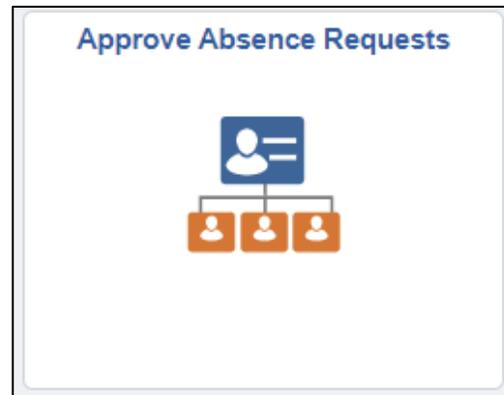


OPTION 2: Approve Absence Request Screen

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

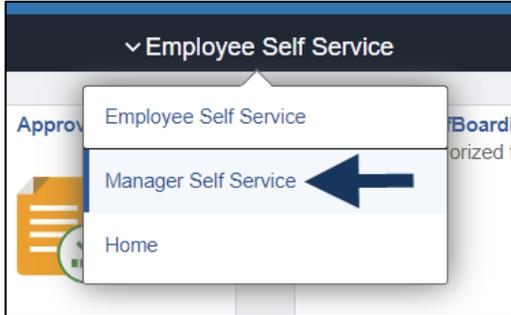


- Click on the **Team Time and Absence** tile then the **Approve Absence Requests** tile. This screen will have a simple interface. You click the employee's name to review the request. From this screen, you can see all Pending, Approved, and Denied requests.

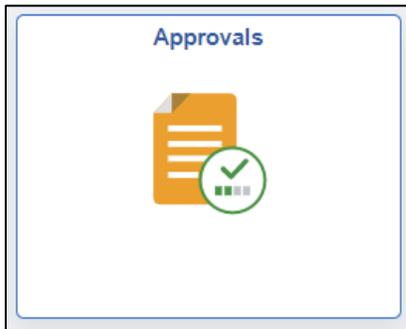


OPTION 3: Pending Approvals Worklist.

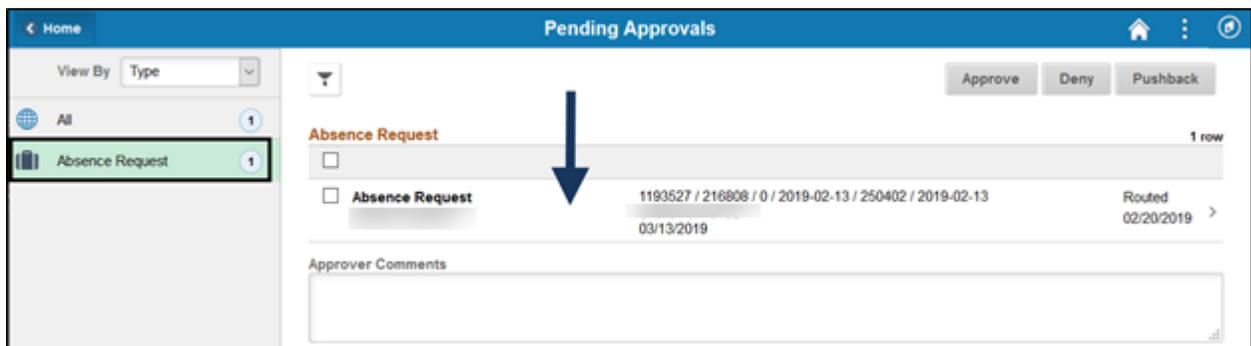
1. From the Home page of ESS, click the drop down in the center and select **Manager Self Service**.



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

Pending Approvals Absence Request

Payroll Clerk Approve Deny Pushback

In Process

Absence Details

Absence Name	Vacation	Reason	
Start Date	03/13/2019	End Date	03/13/2019
Original Start Date	02/13/2019	Duration	2 Hours
Partial Days	Start Day 2 Hours		
Current Balance	195.00 Hours	Disclaimer	Check Eligibility
			View Eligibility Details

Additional Information

Requester Comments

There are no requester comments

Request History

Approver Comments

Approval Chain

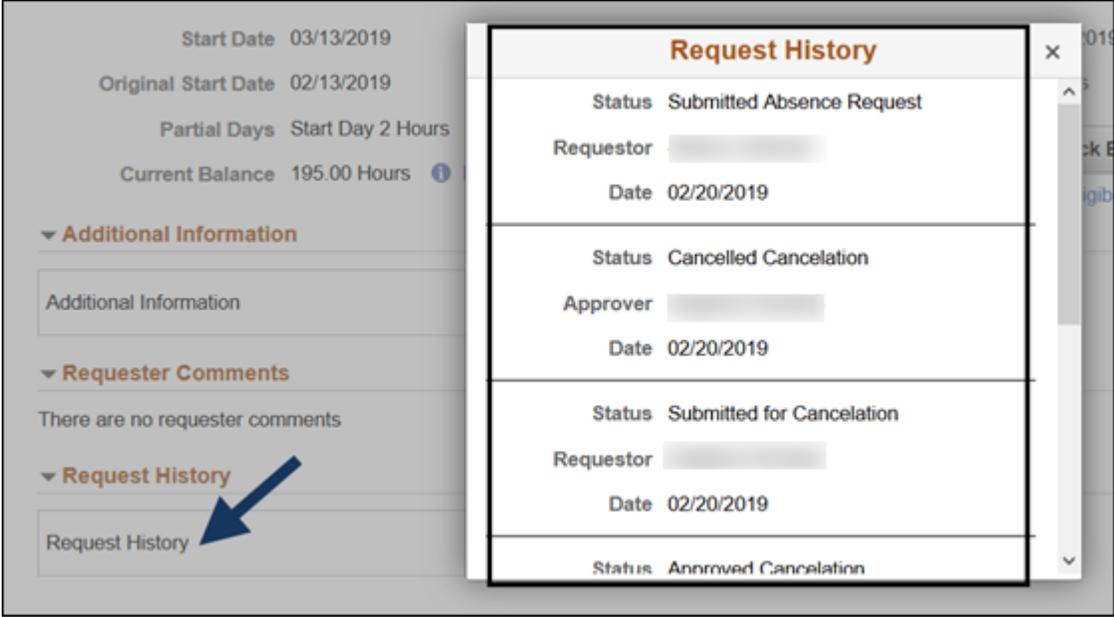
Check Eligibility results

Completed Successfully!
Date Time: July 22,2020 at 10:52:14.

View Eligibility Details

Eligibility Details	
As of Date - Forecasted Available Balance	24.00
07/01/2020 - 06/30/2021	
As of Date - Forecasted Total Takes	24.00
07/01/2020 - 06/30/2021	
Sick Ent Balance	248.60
07/01/2020 - 06/30/2021	
Sick Ent Take	40.00
07/01/2020 - 06/30/2021	
Forecasting	ELIGIBLE
-	
Forecasting Hold Balance	264.60

Request History



Start Date 03/13/2019
Original Start Date 02/13/2019
Partial Days Start Day 2 Hours
Current Balance 195.00 Hours ⓘ

Additional Information

Requester Comments

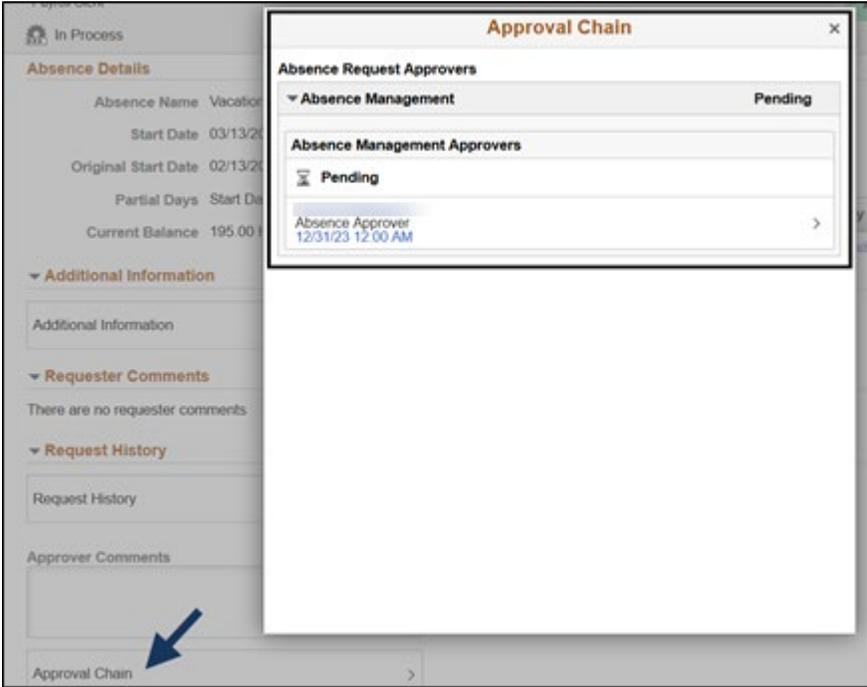
There are no requester comments

Request History

Request History

Request History	
Status	Submitted Absence Request
Requestor	[Redacted]
Date	02/20/2019
Status	Cancelled Cancellation
Approver	[Redacted]
Date	02/20/2019
Status	Submitted for Cancellation
Requestor	[Redacted]
Date	02/20/2019
Status	Approved Cancellation

Approval Chain



In Process

Absence Details

Absence Name Vacation
Start Date 03/13/2019
Original Start Date 02/13/2019
Partial Days Start Day 2 Hours
Current Balance 195.00 Hours ⓘ

Additional Information

Requester Comments

There are no requester comments

Request History

Request History

Approver Comments

Approval Chain

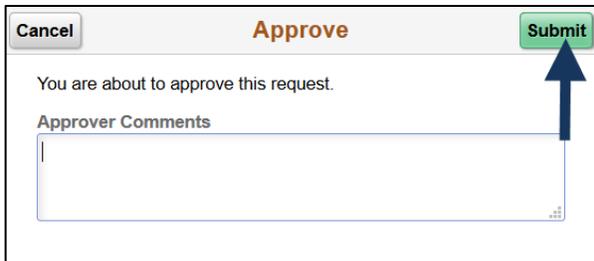
Approval Chain

Approval Chain	
Absence Request Approvers	
<ul style="list-style-type: none"> Absence Management Pending 	
Absence Management Approvers	
<ul style="list-style-type: none"> Pending 	
Absence Approver	[Redacted]
	12/31/23 12:00 AM

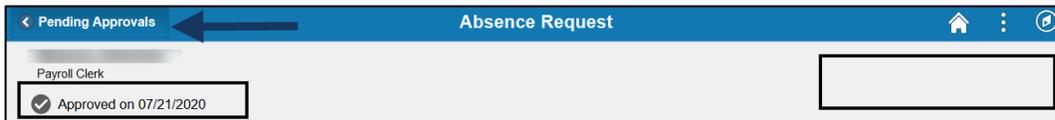
5. Click **Approve, Deny or Pushback**

- **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.