

Employee HR and Payroll Self Service (ESS) Training Manual 2021

Introduction to Employee Self-Service (ESS)

Employee Self-Service is a web-based portal that provides you with visibility to salary and benefit information contained within the Ellucian Colleague modules. The ability to view human resource and payroll data provides an excellent opportunity for you to ensure that the information is correct and kept up to date. The data visible to you includes current and past earnings statements (pay check advice), current and past W-2's, direct deposit information, leave balances, and more. Additionally, if you are a non-exempt employee, this is where you go to enter your time and where supervisors go to approve time for payment.

One of the major advantages of this system is that the data is real-time data. In other words, when you view your information, the system pulls the most current information directly from the HR/Payroll system. If any of the information that you view within ESS is incorrect or you encounter questions, please contact the HR or Payroll office immediately.

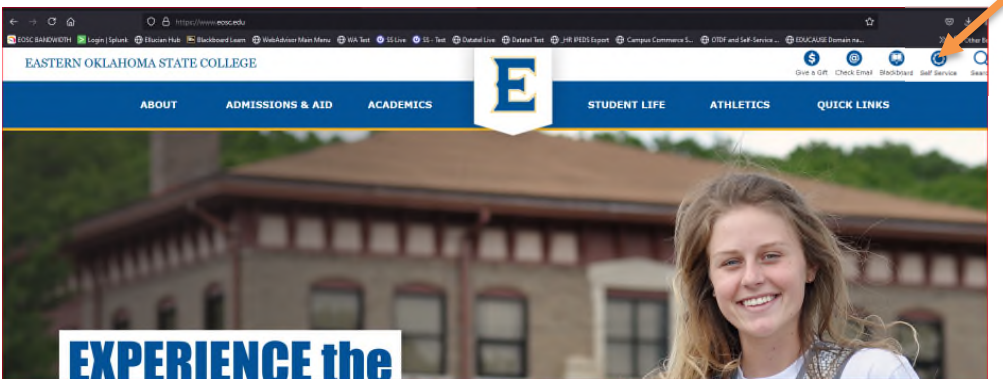
The same login and password that worked for WebAdvisor will work for Self-Service

Table of Contents

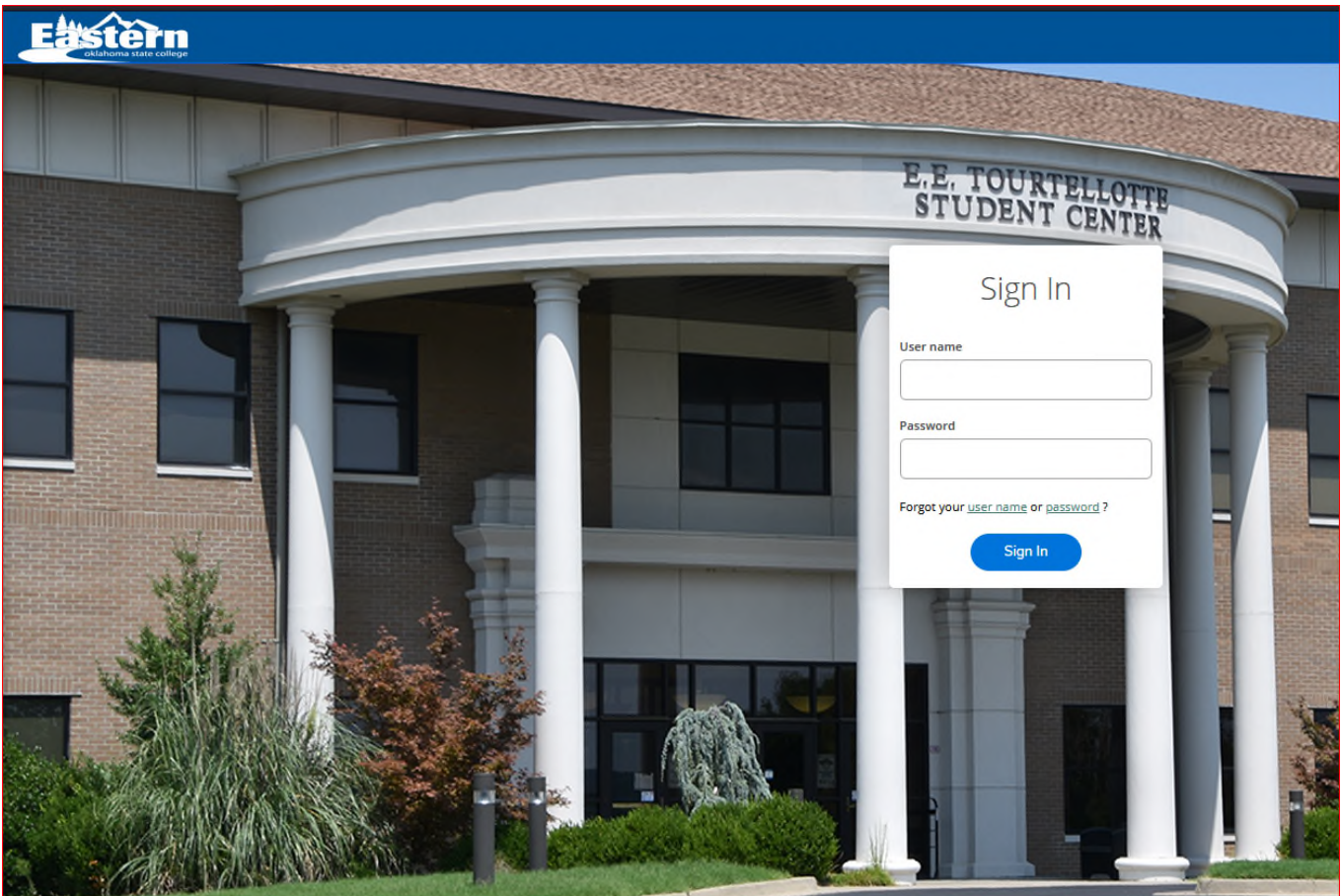
Log In and Basic Layout.....	4
Managing Your User Profile.....	6
Accessing Employee Features within ESS	7
Employee Tax Information – W2’s.....	8
Employee Earning Statements	9
Employee Leave Balances.....	10
Time History for Employee	11
Time Entry and Approval	12
Employee Time Entry	12
Supervisor Time Approval.....	17
Set up a Timecard Proxy Approver	21
Time History for Supervisor	23
Logging Off.....	24
Help and Support	24

Log In and Basic Layout

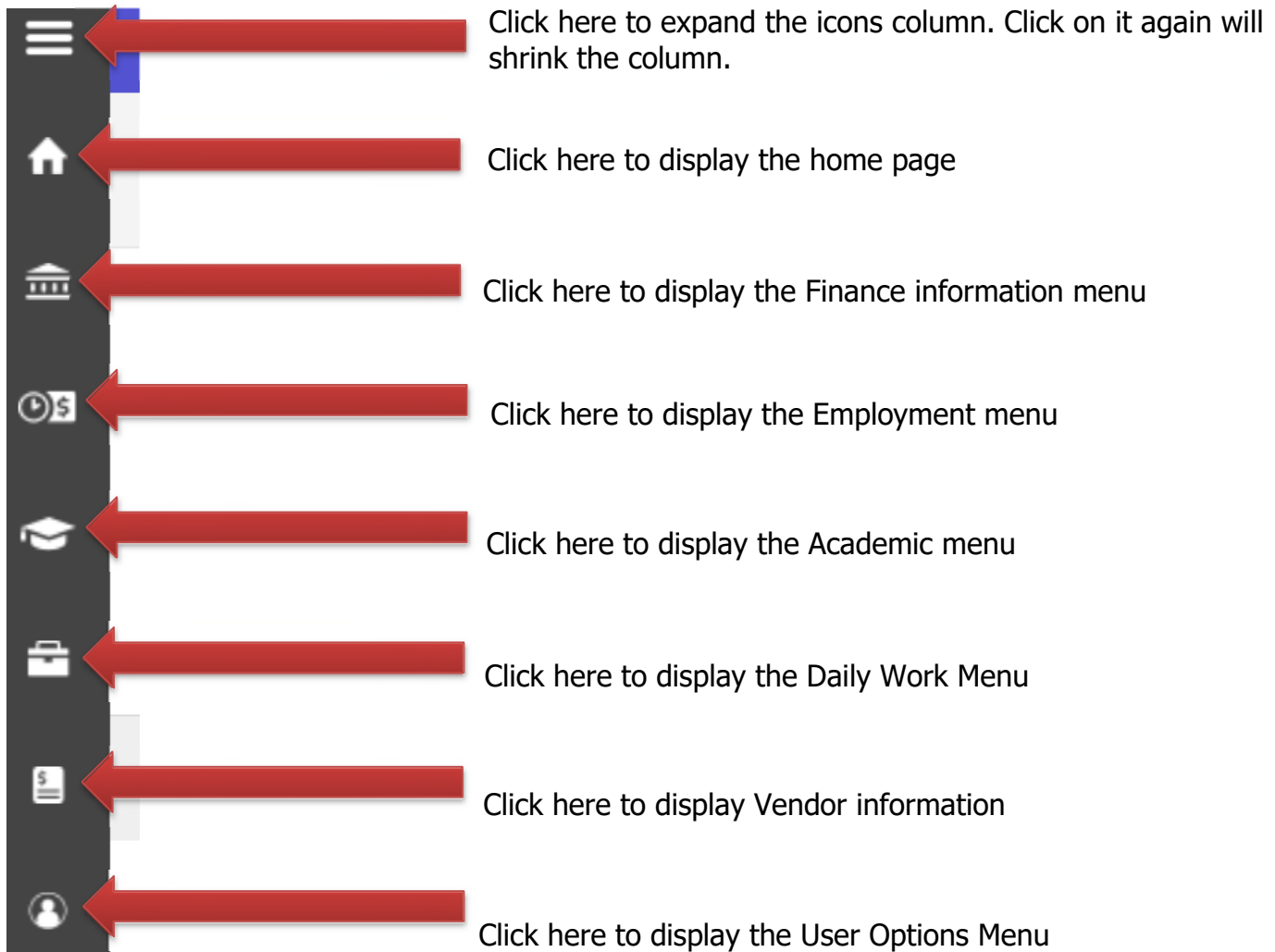
From the EOOSC home page(www.eosc.edu), select "Self Service"



Log in with the same User Name and Password that you use for WebAdvisor.



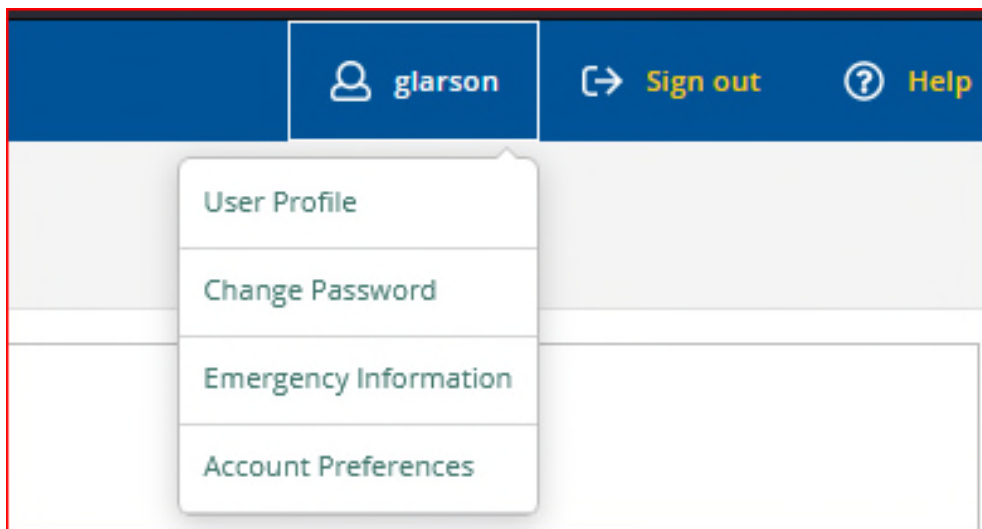
A list of icons appears along the left hand side once you are logged in. You will only see the icons available with permissions for your position.



Managing Your User Profile

To access your user profile, click on your name in the upper right and then select "User Profile". It's very important that you keep the information in your User Profile current. While you can view your address and phone number, you can NOT update these items from here; only your emergency contact information can be edited. To change your address or phone number, please contact Human Resources.

You may change your Emergency Information. It is also where you can enter any health conditions in case of an emergency. This information is stored in the HR module of Colleague and is only accessible by Human Resources and Campus Safety.



Accessing Employee Features within ESS

Click on the tab labeled "Employee".

Eastern Oklahoma State College

Hello, Welcome to Colleague Self-Service!
Choose a category to get started.

- Student Finance**
Here you can view your latest statement and make a payment online.
- Financial Aid**
Here you can access financial aid data, forms, etc.
- Tax Information**
Here you can change your consent for e-delivery of tax information.
- Employee**
Here you can view your tax form consents, earnings statements, banking information, timecards and leave balances.

This is where you will find any and all information related to Taxes, Time Entry, Earning Statements, Leave Balances, Time Approval and Employee Proxy.

Eastern Oklahoma State College

Welcome to Colleague Employee Self-Service!

Employment > Employees > Employee Overview

- Tax Information**
Here you can change your consent for e-delivery of tax information.
- Time Approval**
Here you can approve or reject timecards for the people you supervise.
- Faculty Contracts**
Here you can view your contract assignment details.
- Leave**
Here you can view your leave balances and leave requests.
- Time History**
Here you can view your paid timecards.
- Stipend History**
Here you can view a list of your stipends.
- Current Benefits**
Here you can view all your current benefits.
- Time Entry**
Here you can fill out your timecards.
- Earnings Statements**
Here you can view your earnings statement history.
- Employee Proxy**
Here you can delegate certain types of work tasks to another employee.
- Leave Approval**
Here you can approve or reject leave requests for people you supervise.
- Time History (Supervisor)**
Here you can view paid timecards for the people you supervise.
- Total Compensation Statement**
Here you can view your Total Compensation Statement.

Employee Tax Information – W2’s

To view your Tax information click on the “Tax Information” box.

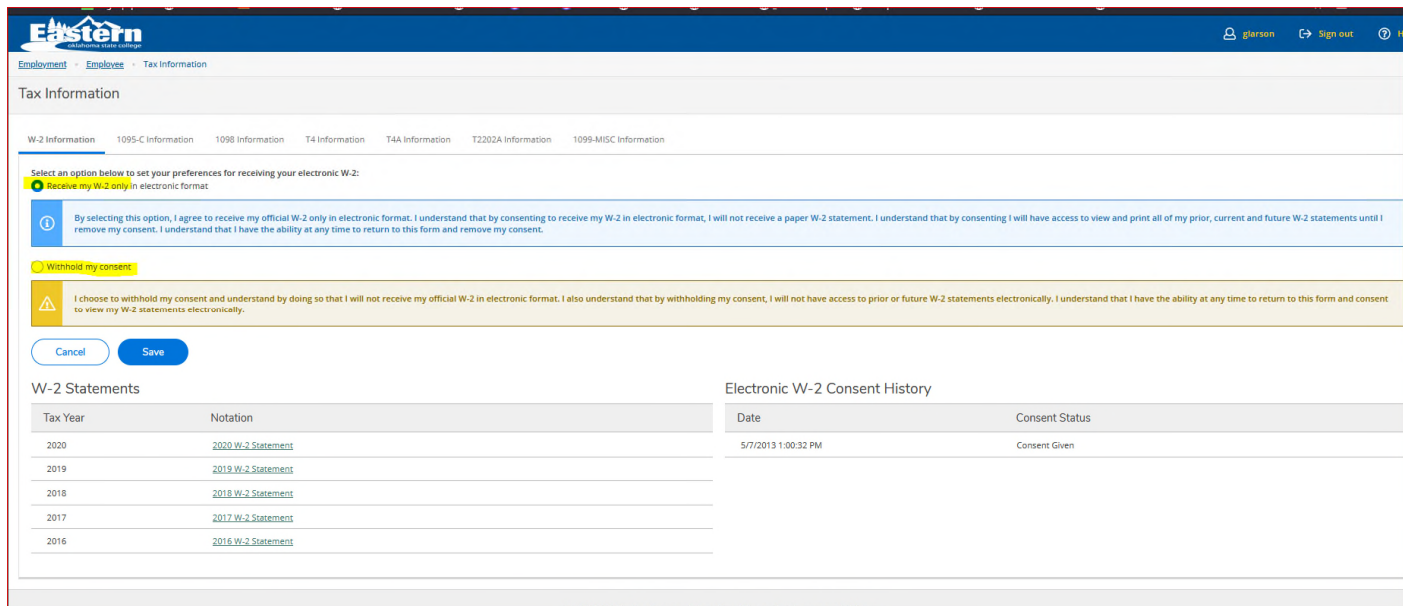


Tax Information

Here you can change your consent for e-delivery of tax information.

In this area you can set your preference for receiving your W-2. If you wish to receive them electronically then you can choose:

- Receive my W-2 only in electronic format or
- Withhold my consent and get your W-2 on paper.



The screenshot shows the 'Tax Information' page in the Eastern University Self-Service portal. The page has a blue header with the Eastern University logo and navigation links for 'Employment', 'Employees', and 'Tax Information'. Below the header, there are tabs for various tax forms: 'W-2 Information', '1095-C Information', '1098 Information', 'T4 Information', 'T4A Information', 'T2202A Information', and '1099-MISC Information'. The 'W-2 Information' tab is selected.

The main content area is titled 'Tax Information' and contains a section for selecting preferences for receiving electronic W-2s. There are two radio button options:


- Receive my W-2 only in electronic format** (selected): A blue box with an information icon contains the text: "By selecting this option, I agree to receive my official W-2 only in electronic format. I understand that by consenting to receive my W-2 in electronic format, I will not receive a paper W-2 statement. I understand that by consenting I will have access to view and print all of my prior, current and future W-2 statements until I remove my consent. I understand that I have the ability at any time to return to this form and remove my consent."
- Withhold my consent**: A yellow box with a warning icon contains the text: "I choose to withhold my consent and understand by doing so that I will not receive my official W-2 in electronic format. I also understand that by withholding my consent, I will not have access to prior or future W-2 statements electronically. I understand that I have the ability at any time to return to this form and consent to view my W-2 statements electronically."

Below the options are 'Cancel' and 'Save' buttons. At the bottom of the page, there are two tables:

W-2 Statements		Electronic W-2 Consent History	
Tax Year	Notation	Date	Consent Status
2020	2020 W-2 Statement	5/7/2013 1:00:32 PM	Consent Given
2019	2019 W-2 Statement		
2018	2018 W-2 Statement		
2017	2017 W-2 Statement		
2016	2016 W-2 Statement		

Employee Earning Statements

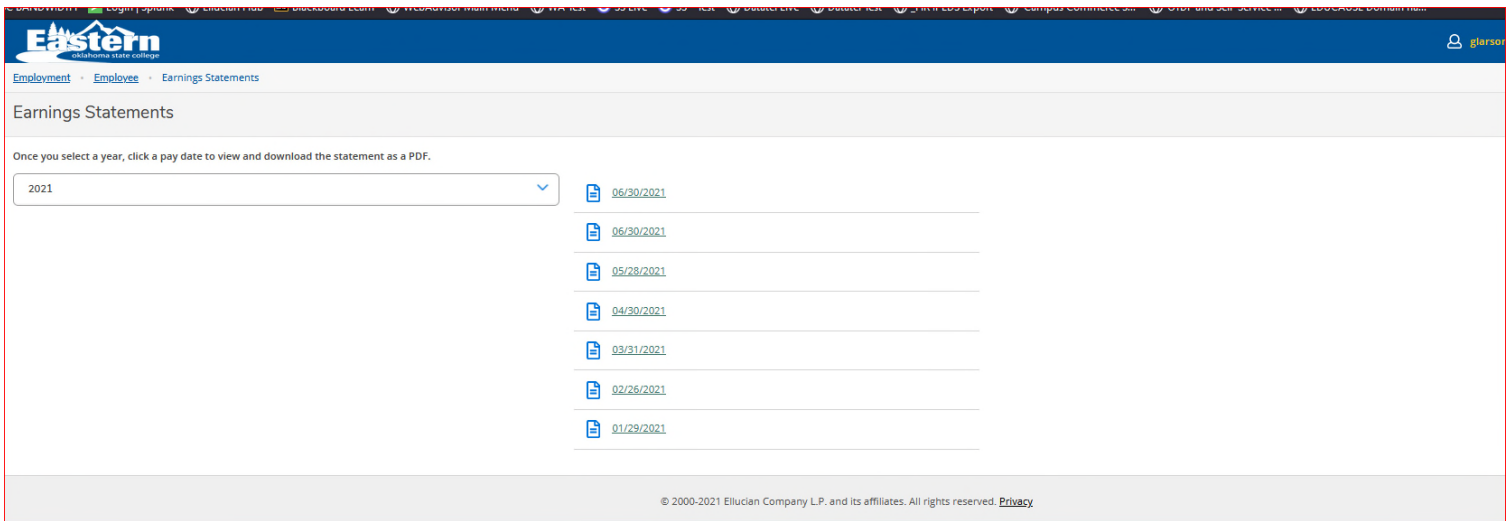
To access your Earning Statements in ESS, click on "Earning Statements"



Earnings Statements

Here you can view your earnings statement history.

On this screen you can view your Earnings Statements, just click on the date of the one you want to view and it will download. You can open to review or print it out.



The screenshot shows the 'Earnings Statements' page in the ESS system. At the top left is the 'Eastern Oklahoma State College' logo. Below the logo is a breadcrumb trail: 'Employment > Employee > Earnings Statements'. The main heading is 'Earnings Statements'. Below this, a instruction reads: 'Once you select a year, click a pay date to view and download the statement as a PDF.' There is a dropdown menu currently set to '2021'. To the right of the dropdown is a list of seven pay dates, each with a document icon to its left: 06/30/2021, 06/30/2021, 05/28/2021, 04/30/2021, 03/31/2021, 02/26/2021, and 01/29/2021. At the bottom of the page, there is a copyright notice: '© 2000-2021 Ellucian Company L.P. and its affiliates. All rights reserved. Privacy'.

Employee Leave Balances


In this area you will be able to view your Vacation and Sick/Personal balances. Click on "Leave".



Leave


Here you can view your leave balances.

Notice you can view what you have used and your overall balance in the graphic at the top of the screen. Details about accrual earnings, usage and adjustments are found below.


Employment > Employee > Leave


Leave

Leave Balance ⓘ



Vacation (Hours)

0.00	240.00
Used	Balance



Sick (Hours)

16.00	925.42
Used	Balance

Leave Requests

ⓘ You have no outstanding leave requests


Leave - As Of 6/28/2021 ⓘ

Description	Starting Balance	Earned	Used	Adjustments	Balance
Compassionate	0.00	0.00	16.00	0.00	-16.00
Workers Compensation Leave	0.00	0.00	0.00	0.00	0.00
Furlough-Unpaid	-16.00	0.00	0.00	0.00	-16.00
Vacation Salary-12 Month	240.00	0.00	0.00	0.00	240.00
Sick Salaried 12 Mo. Admn.	881.42	60.00	16.00	0.00	925.42

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Time History for Employee

Select Time History




Time History

Here you can view your paid timecards.




In this section you can view time sheet history. To change to a previous year, click the blue drop down arrow next to the current year at the top of the screen. Click the blue ">" to navigate between pay periods. Expand the time card by clicking the date range on the right side of the screen.

Time History

Select a Year to view associated Pay Period

2019 

Pay Period

- 07/28/2019 - 08/10/2019** 
Bi-Weekly Payroll
- 07/14/2019 - 07/27/2019 
Bi-Weekly Payroll
- 06/30/2019 - 07/13/2019 
Bi-Weekly Payroll

07/28/2019 - 08/10/2019
Bi-Weekly Payroll

Dates

- 07/28/2019 - 08/03/2019
- 08/04/2019 - 08/10/2019

Time Entry and Approval

Employee Time Entry

In the Time Entry area of ESS you are able to view, enter, make comments, and submit time worked. To start entering your time in ESS click on "Time Entry"



Time Entry

Here you can fill out your timecards.

1. Select the pay period and click the blue arrow on the far right to open the timesheet.

In this example, the person has one job.

10/15/2018 - 10/15/2018 Due by: 10/17/2018 10:00 AM Total: 6.25 Hours	Approved	Human Resources Specialist	>
10/16/2018 - 10/21/2018 Due by: 11/1/2018 10:00 AM Total: 0.00 Hours		Human Resources Specialist	>
10/22/2018 - 10/28/2018 Due by: 11/1/2018 10:00 AM Total: 0.00 Hours		Human Resources Specialist	>

Multiple jobs will look like this; click the blue arrow to expand all timesheets.

Administrative Assistant to the President Admissions Counselor (temporary, Non-Exempt)	>
--	---

- Enter Time Worked. Some positions require detailed time entry, others only summed hours per day. Your time will save automatically. There is a Save button but you don't really need it.

Detailed time entry (In and out time) view

Week 12/03/2018 - 12/09/2018
22.50 Total hours

Saved at 7:48 PM [Save](#) [View Leave Balances](#)

HRPRPTHPN01 • [Part-Time Help \(Non-Student\)](#)
Dotts, Janene M. • Human Resources & Payroll • Athens (01)
22.50

Earn Type	Mon 12/3	Tue 12/4	Wed 12/5	Thu 12/6	Fri 12/7	Sat 12/8	Sun 12/9	Total
Regular Earnings	8:00 AM	8:00 AM	8:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	22.50
	12:00 PM	12:00 PM	12:00 PM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	
	1:00 PM	1:00 PM	1:00 PM					
	4:30 PM	4:30 PM	4:30 PM					
	- +	- +	- +					

Total time per day view

Pay Period 07/14/2019 - 07/27/2019
[All Time Sheets](#)

Week 07/14/2019 - 07/20/2019
37.50 Total hours

Saved just now [Save](#)

35002ADMASST • [Administrative Assistant to the President](#)
Martin, Kathryn E. • Office of the President • Institutional Support
37.50


Earn Type	Sun 7/14	Mon 7/15	Tue 7/16	Wed 7/17	Thu 7/18	Fri 7/19	Sat 7/20	Total
Regular Earnings		7.50	7.50	7.50	7.50	7.50		37.50
+ Additional Time								
Position Total Hours:	0.00	7.50	7.50	7.50	7.50	7.50	0.00	37.50
Comments Submit for Approval								

30020COUNTMP • [Admissions Counselor \(temporary, Non-Exempt\)](#)
Martin, Kathryn E. • Admissions • Student Services
0.00

Weekly Totals

Notice that the arrows toggle back and forth between both weeks in the pay period to allow you to enter time on the correct week.

Pay Period 07/14/2019 - 07/27/2019
[< All Time Sheets](#)

[<](#) Week 07/14/2019 - 07/20/2019 [>](#) 

37.50 Total hours

35002ADMASST • Administrative Assistant to the President
Martin, Kathryn E. • Office of the President • Institutional Support
37.50

3. Submit time for approval at the end of each week, or every Monday no later than 10 a.m. for the previous pay week. If you wish to make comments on your timesheet, you must do it before you "Submit for Approval".

[<](#) Week 12/03/2018 - 12/09/2018 [>](#) Saved at 7:48 PM [Save](#) [View Leave Balances](#)

22.50 Total hours

- + - + - +


Choose Earn Type 0.00

[Remove](#)

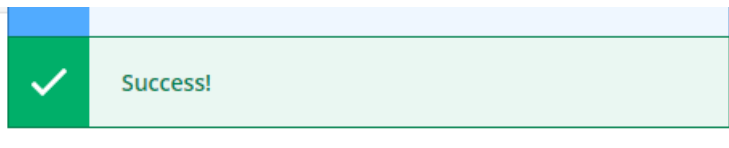
+ Additional Time

Position Total Hours:	7.50	7.50	7.50	0.00	0.00	0.00	0.00	22.50
-----------------------	------	------	------	------	------	------	------	-------

[Comments](#) [Submit for Approval](#)



After clicking "Submit for Approval" you will see this pop up in the upper right corner of your screen. Your Supervisor will get an e-mail that you have submitted your timecard.



If you made a mistake on a timecard and you need to correct it, click "Return Timecard to Edit". Once you've made your changes, resubmit the time. Keep in mind that your Supervisor will get an email for each action that you make to the timecard.

Position Total Hours:	0.00	5.0
-----------------------	------	-----

[Comments](#) [Return Timecard to Edit](#) ←

Entering in Vacation/Sick or other Leave Time

1. From your timecard, Select "+ Additional Time".

35002ADMASST • Administrative Assistant to the President
Martin, Kathryn E. • Office of the President • Institutional Support
37.50

Earn Type	Sun 7/14	Mon 7/15	Tue 7/16	Wed 7/17	Thu 7/18	Fri 7/19	Sat 7/20	Total
Regular Earnings	<input type="text"/>	7.50	7.50	<input type="text"/>	7.50	7.50	<input type="text"/>	37.50

[+ Additional Time](#) ←

Position Total Hours:	0.00	7.50	7.50	7.50	7.50	7.50	0.00	37.50
-----------------------	------	------	------	------	------	------	------	-------

[Comments](#) [Submit for Approval](#)

2. Select the earnings type you wish to enter

Earn Type	Sun
Regular Earnings	<input type="text"/>

Choose Earn Type ^

-
- Sick/Personal
- Vacation
- Jury Duty
- Funeral
- Personal Time
- Holiday/Weather Closing

[Submit for Approval](#)


Enter the number of hours on the day of the week in which you took the leave. For this example, we will select funeral leave. Enter the number of hours. You can add other leave types by clicking “+ Additional Time” and repeating the process. Once you are done, you may exit the timecard (remember your time saves automatically) or you can click Save. If you have finished entering time for the pay week, click “Submit for Approval”.

35002ADMASST • Administrative Assistant to the President
 Martin, Kathryn E. • Office of the President • Institutional Support
 37.50

Earn Type	Sun 7/14	Mon 7/15	Tue 7/16	Wed 7/17	Thu 7/18	Fri 7/19
Regular Earnings	<input type="text"/>	<input type="text" value="7.50"/>	<input type="text" value="7.50"/>	<input type="text" value="3.50"/>	<input type="text" value="7.50"/>	<input type="text" value="7.50"/>
Funeral	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="4.00"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Remove Funeral"/>						
<input type="button" value="+ Additional Time"/>						
Position Total Hours:	0.00	7.50	7.50	7.50	7.50	7.50
<input type="button" value="Comments"/> <input type="button" value="Submit for Approval"/>						

Supervisor Time Approval

To access the time approval screen in ESS, click on "Time Approval"



Time Approval

Here you can approve or reject timecards for the people you supervise

In the Time Approval area of ESS, you will be able to view, approve, reject, make comments and update your employee's time. There are multiple ways to do these functions. Any time you approve, reject, make a change, or unapprove a timecard, the system will send an email to your employee that you have done so. (Terminology Tip: "Reject" is used before you approve a timecard to send it back to the employee for changes. "Unapprove" is used after you have approved the timecard and realize that corrections are needed.)

A few general tips about time approval:

- If you are editing time, please note that supervisor screens do NOT save automatically, unlike employee time entry screens. You must "save" your changes as you go along.
- Be mindful of which week you are approving time for as more than one pay period may be open.

All of the employees that you are a time approver for will show up in one list. Notice this list has a mix of bi-weekly staff and student employees. The tabs differentiate student from staff payrolls.

[Employment](#) · [Employee](#) · [Time Approval](#)

Time Approval

Bi-Weekly Payroll Bi-Weekly Student

Time Sheets	Due By	Status	Total Hours	Regular Hours	Overtime Hours	Additional Hours	
Lester, Kathy F. - 0710817							
✓ 09/22/2019-10/05/2019	10/7/2019 4:30 PM	⊘ No Time Entered	0.00	0.00	0.00	0.00	✓ ⊘ ☰ ... Approve Reject Comments View

Bi-Weekly Payroll **Bi-Weekly Student**

Time Sheets	Due By	Status	Total Hours	Regular Hours	Overtime Hours	Additional Hours	
Ferguson, Matthew L. - 0885178							
✓ 09/29/2019-10/12/2019	10/14/2019 4:30 PM	⊘ No Time Entered	0.00	0.00	0.00	0.00	✓ ⊘ ☰ ... Approve Reject Comments View
✓ 09/15/2019-09/28/2019	9/30/2019 4:30 PM	Approved	0.00	0.00	0.00	0.00	✓ ⊘ ☰ ... Unapprove Reject Comments View

Supervisors have the option to approve, reject, add comments or view. You have several ways to do all of these. Here is where you do it from the main screen.

Employment · Employee · Time Approval

Time Approval

Bi-Weekly Payroll Bi-Weekly Student

Time Sheets	Due By	Status	Total Hours	Regular Hours	Overtime Hours	Additional Hours				
Lester, Kathy F. - 0710817										
✓ 09/22/2019-10/05/2019	10/7/2019 4:30 PM	⊘ No Time Entered	0.00	0.00	0.00	0.00	✓	!	⋮	⋮
							Approve	Reject	Comments	View

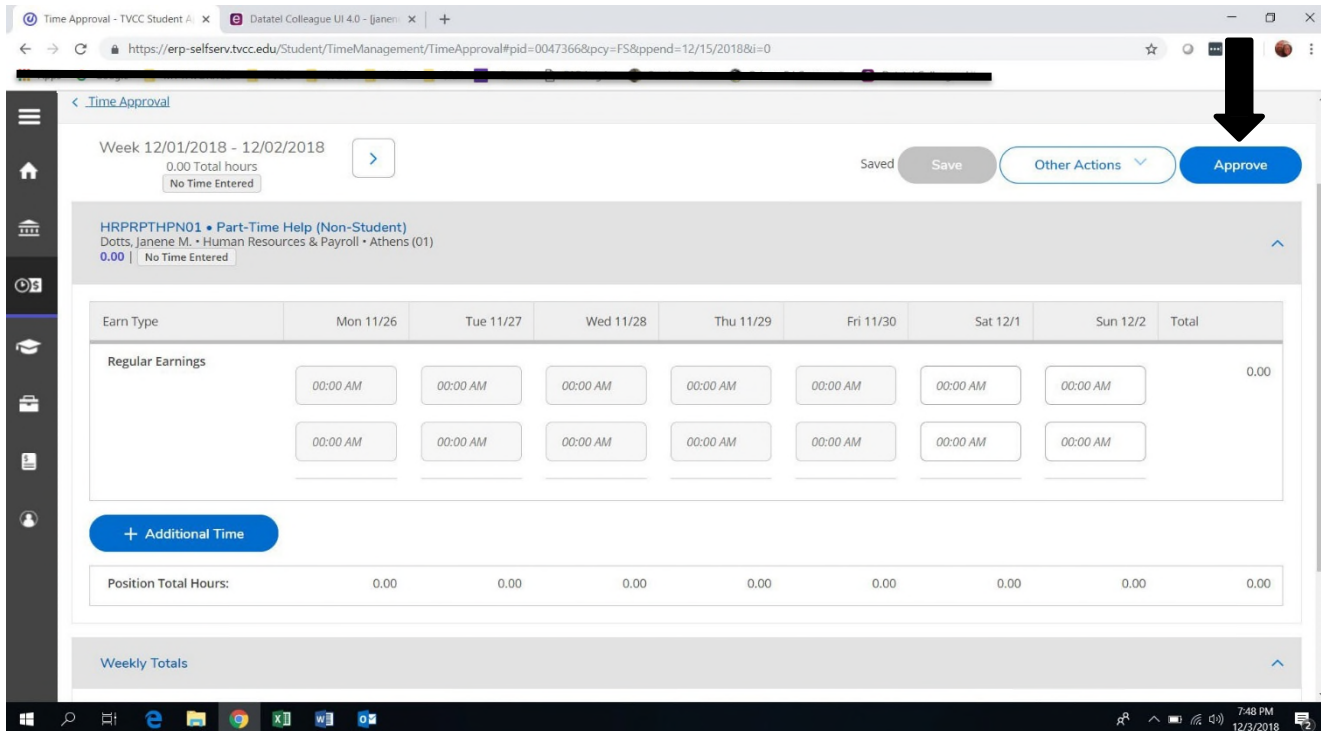
You can click on the “view” to see the timecard detail. It is highly recommended you do this before approving timecards. You can edit the employee’s timecard from here, as well as approve.

Employment · Employee · Time Approval

Time Approval

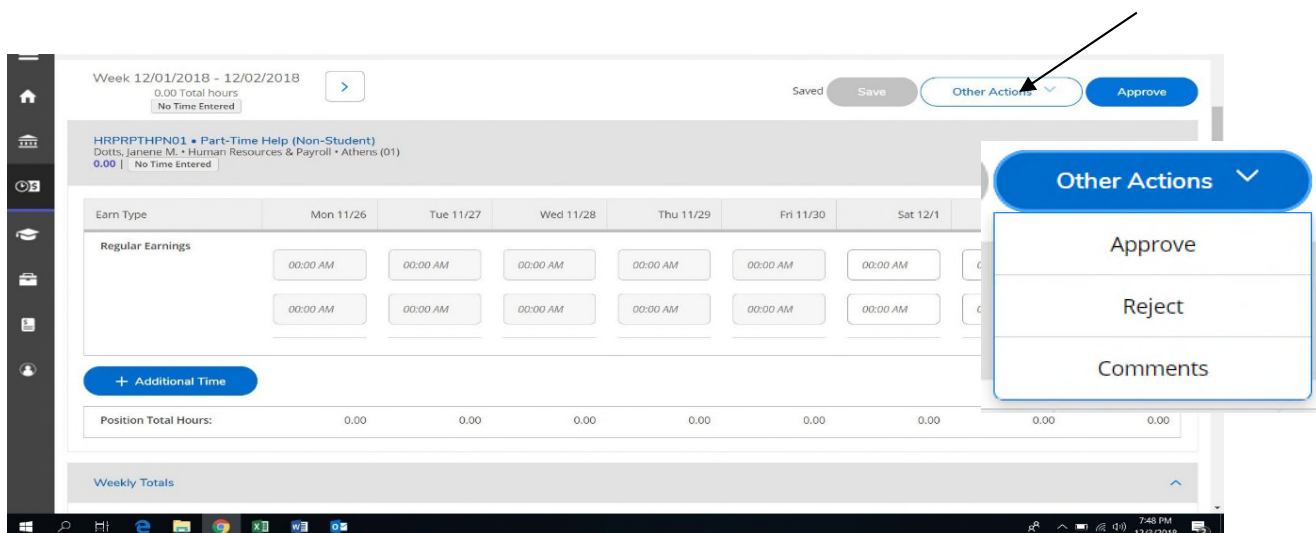
Bi-Weekly Payroll Bi-Weekly Student

Time Sheets	Due By	Status	Total Hours	Regular Hours	Overtime Hours	Additional Hours				
Lester, Kathy F. - 0710817										
✓ 09/22/2019-10/05/2019	10/7/2019 4:30 PM	⊘ No Time Entered	0.00	0.00	0.00	0.00	✓	!	⋮	⋮
							Approve	Reject	Comments	View

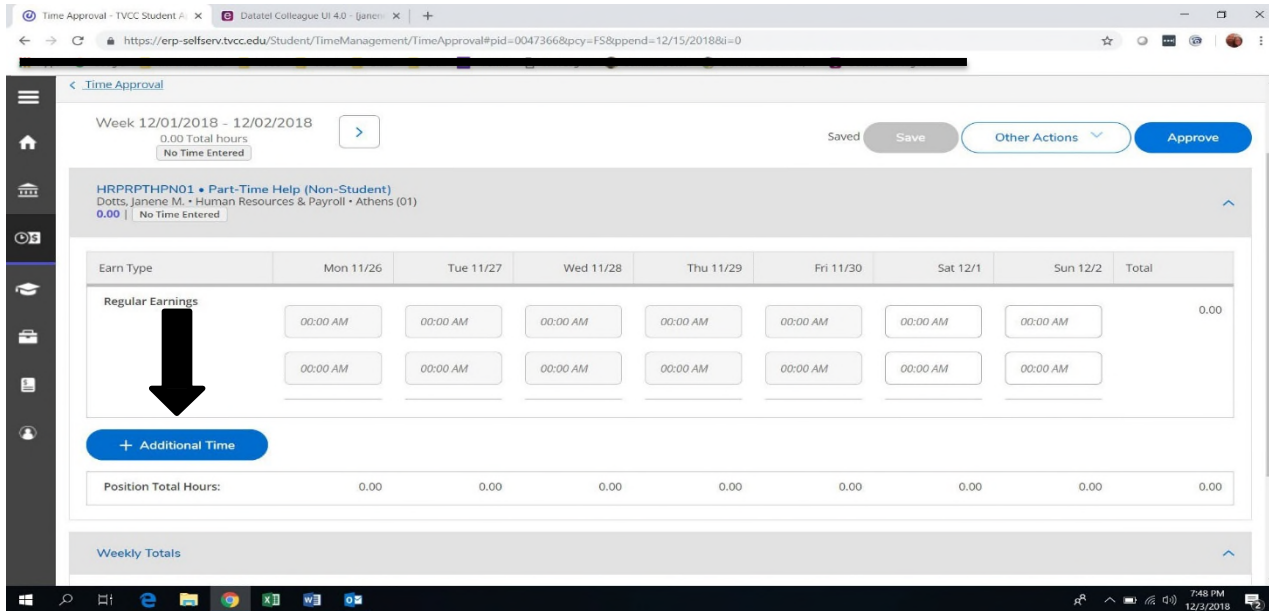


If you wish to add a comment, you must do it BEFORE you approve the timecard. If you forget, you will need to unapprove the timecard, make the comment and approve again. (Note: Your employee will get an e-mail when you unapprove the timecard, and again when you approve it.)

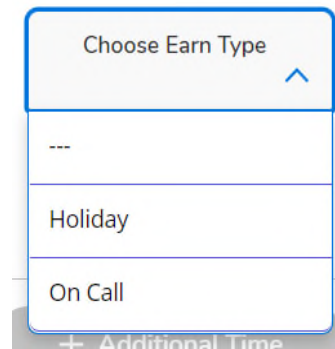
Another option is to click "Other Actions"; you can add comments and approve or reject from here.



If your employee forgot to add leave to their timecard, you can add it for them or reject the timecard, sending it back for them to edit. Click "+ Additional Time" to edit time.



After you click on "+ Additional Time" choose the description that matches the time you need to enter for the employee. Key in the hours on the date the leave was used.



After you add the additional time, if you need to remove it you can click on "Remove".

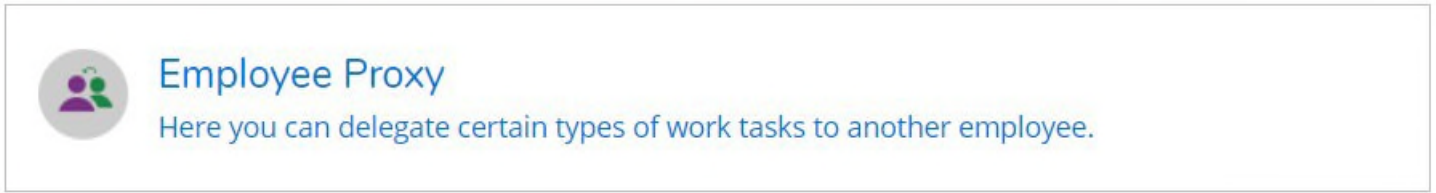


Once you have approved the timecard, green "Approved" boxes will appear and you are done with the employee.



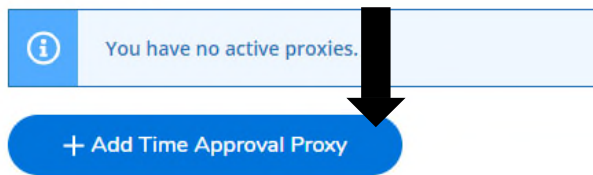
Set up a Timecard Proxy Approver

To access the employee proxy area in ESS, click on "Employee Proxy".

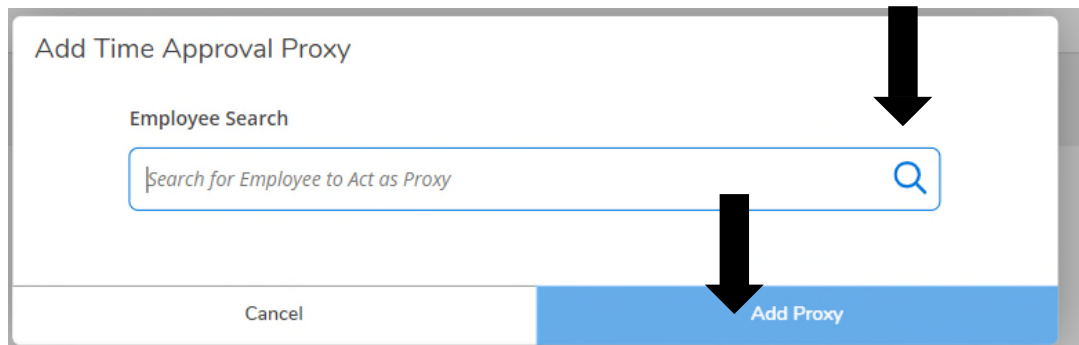


Click "+ Add Time Approval Proxy"

Add Proxy



Enter the name of the person you would like to approve your timecards and select their name from the list that pops up. Once selected click "Add Proxy". The system is not date sensitive. Once you set up a proxy, it goes into effect immediately and stays on until you remove it.

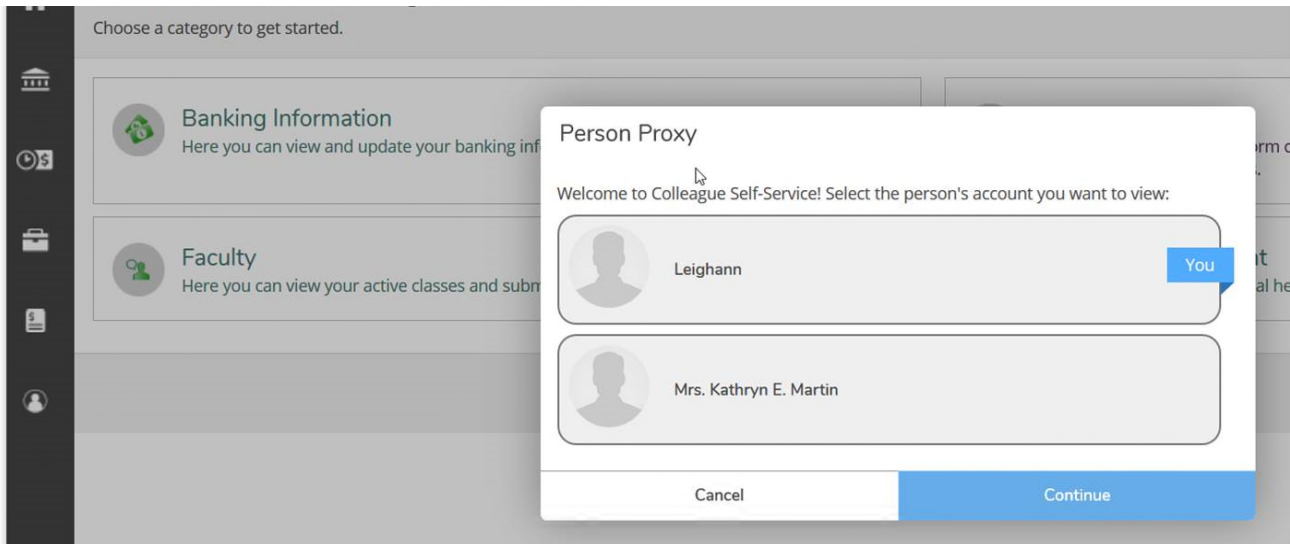


When you are finished, it will look like this. Click the red circled X to remove a proxy.

Add Proxy



If you are the proxy for someone else, this is the screen you will see when you log in. You can toggle back and forth between your own timecards and the person you are filling in for.



Time History for Supervisor



Time History (Supervisor)

Here you can view paid timecards for the people you supervise.

Enter in the name of the employee you would like to view and execute the search.

Time History (Supervisor)

Financial Information

Search for Employee

Employee Name or ID



Once you have found the employee you are looking for, select the pay period and specific dates you wish to view. To change to a previous year, click the blue drop down arrow next to the current year at the top of the screen. Click the blue ">" to navigate between pay periods. Expand the time card by clicking the date range on the right side of the screen.

Select a Year to view associated Pay Period

2019



Pay Period

07/28/2019 - 08/10/2019
Bi-Weekly Payroll



07/14/2019 - 07/27/2019
Bi-Weekly Payroll



06/30/2019 - 07/13/2019
Bi-Weekly Payroll



06/16/2019 - 06/29/2019
Bi-Weekly Payroll



07/28/2019 - 08/10/2019

Bi-Weekly Payroll

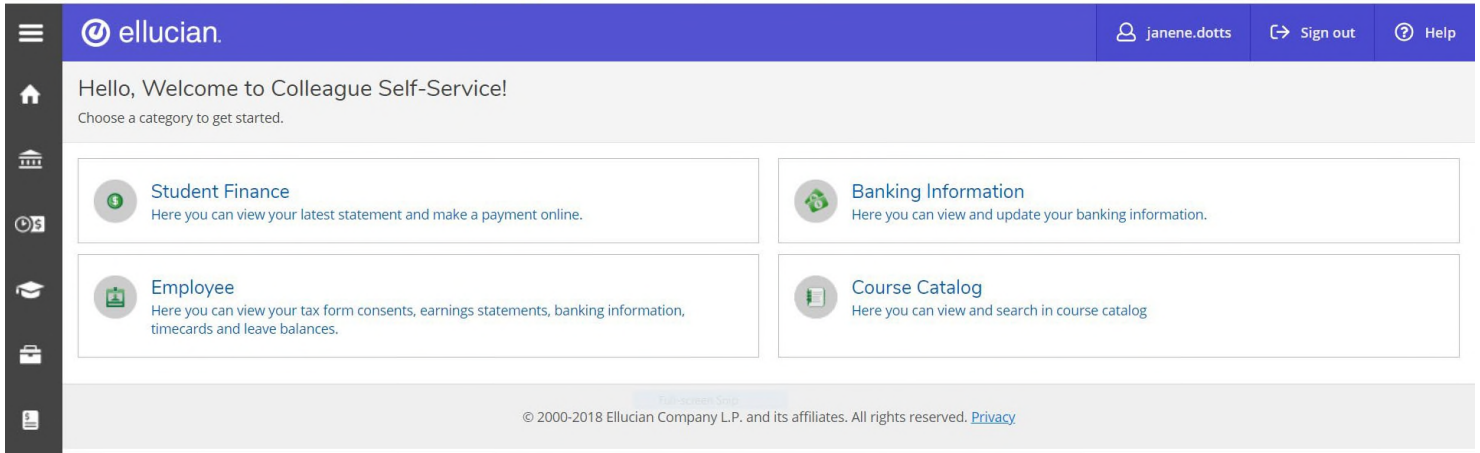
Dates

07/28/2019 - 08/03/2019

08/04/2019 - 08/10/2019

Logging Off

You should always log off of ESS by exiting using the "SIGN-OUT" link as shown below.



The screenshot shows the ellucian self-service portal interface. At the top right, there is a navigation bar with the user's name 'janene.dotts', a 'Sign out' link with an arrow pointing to it, and a 'Help' link. Below the navigation bar, there is a welcome message: 'Hello, Welcome to Colleague Self-Service! Choose a category to get started.' The main content area is divided into four categories: 'Student Finance', 'Banking Information', 'Employee', and 'Course Catalog'. Each category has a brief description of the services available. At the bottom of the page, there is a copyright notice: '© 2000-2018 Ellucian Company L.P. and its affiliates. All rights reserved. Privacy'.

Help and Support

Help will be available to all ESS users by contacting Payroll or Human Resources during the hours of 8:00 AM – 4:30 PM on Monday – Friday.

Mikayla Vandaveer mvandaveer@eosc.edu 918-465-1778	Nicole Mote nmote@eosc.edu 918-465-1760
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