Employee Access User Guide

## Overview

This document will:
- Provide steps on how to log in to the Employee Access software, and what steps to take if there are difficulties in logging in.
- Provide instructions on how to navigate the Employee Access software.
- Describe the processes for changing or updating select areas of your employee information within the software.

Document Contents

- Logging in to the Employee Access software
- Employee Access dashboard overview
- How do I change demographic information (address, phone, emergency contacts, etc.)?
- How do I change my taxes or add/change direct deposit?
- Resources Drop Down (overview of additional resources)

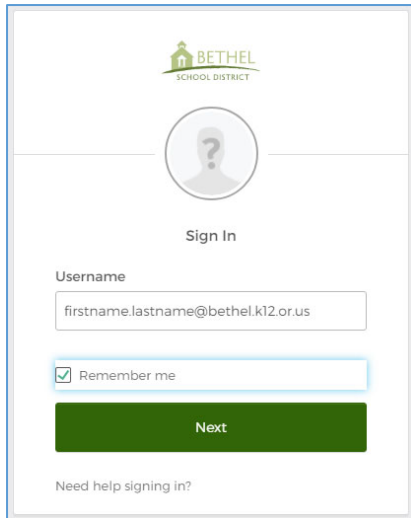## Logging in to the Employee Access software

- **Step 1** – Access Bethel's homepage (www.bethel.k12.or.us) from your internet browser (Chrome is recommended). From there, click on the "Staff Portal" button in the upper right hand corner:
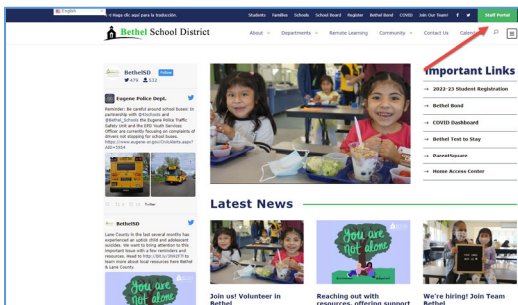
A new screen will appear. Click on "Employee Access":
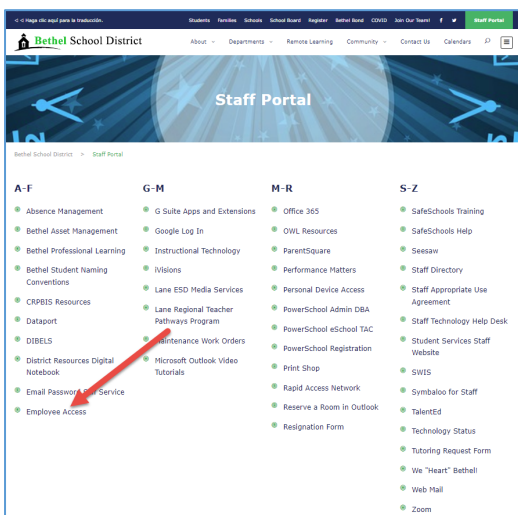
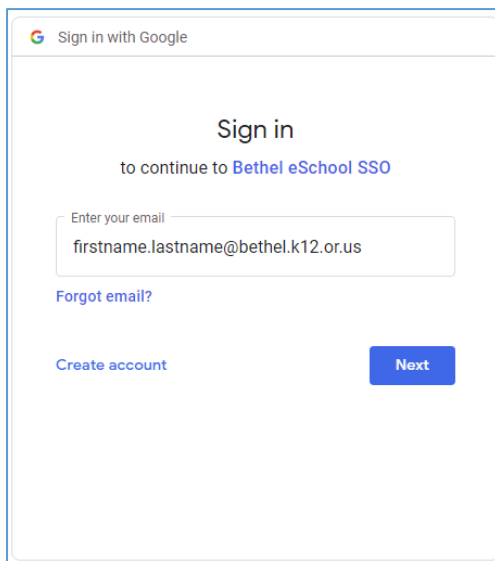- **Step 2** – An initial login screen will appear:

Username: firstname.lastname@bethel.k12.or.us (*the same firstname.lastname you'd use for logging in to your District computer with the @bethel.k12.or.us at the end*)

Remember me: check this box and upon your next login your username should automatically appear and you won't have to retype it.

Click the green "Next" button to continue to the next screen.

- **Step 3** – The Google SSO (single sign on) login screen will appear:

Username: firstname.lastname@bethel.k12.or.us (*the same firstname.lastname you'd use for logging in to your District computer with the @bethel.k12.or.us at the end*)

Click the blue "Next" button to continue to the next screen.

Password: this is the same password you'd use for logging in to your District computer

Click the blue "Next" button to continue to the next screen.

- **Step 4** – If this is the first time you have logged in to Employee Access, there are a couple extra steps to verify your identity for security purposes. The following screen will appear. Subsequent logins after this should not ask you for this information (however there are occasions where this *will* happen again, for example: after a browser cache clearing, from a different computer, from a different web browser, etc.).
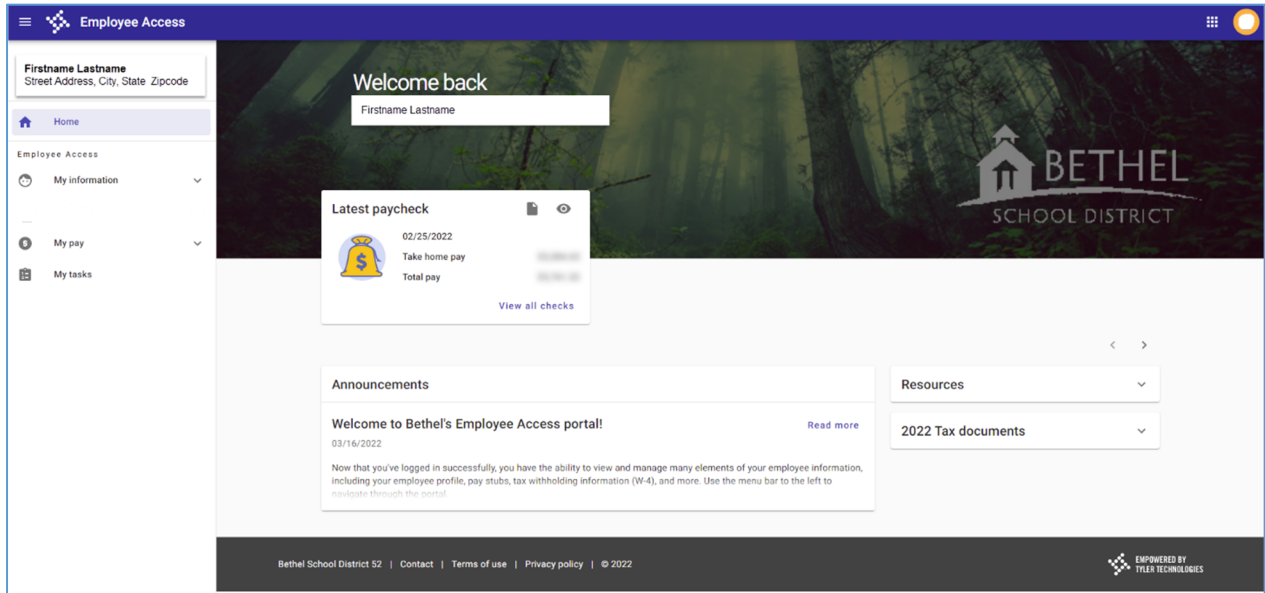

Email Address: Enter your full Bethel email address.
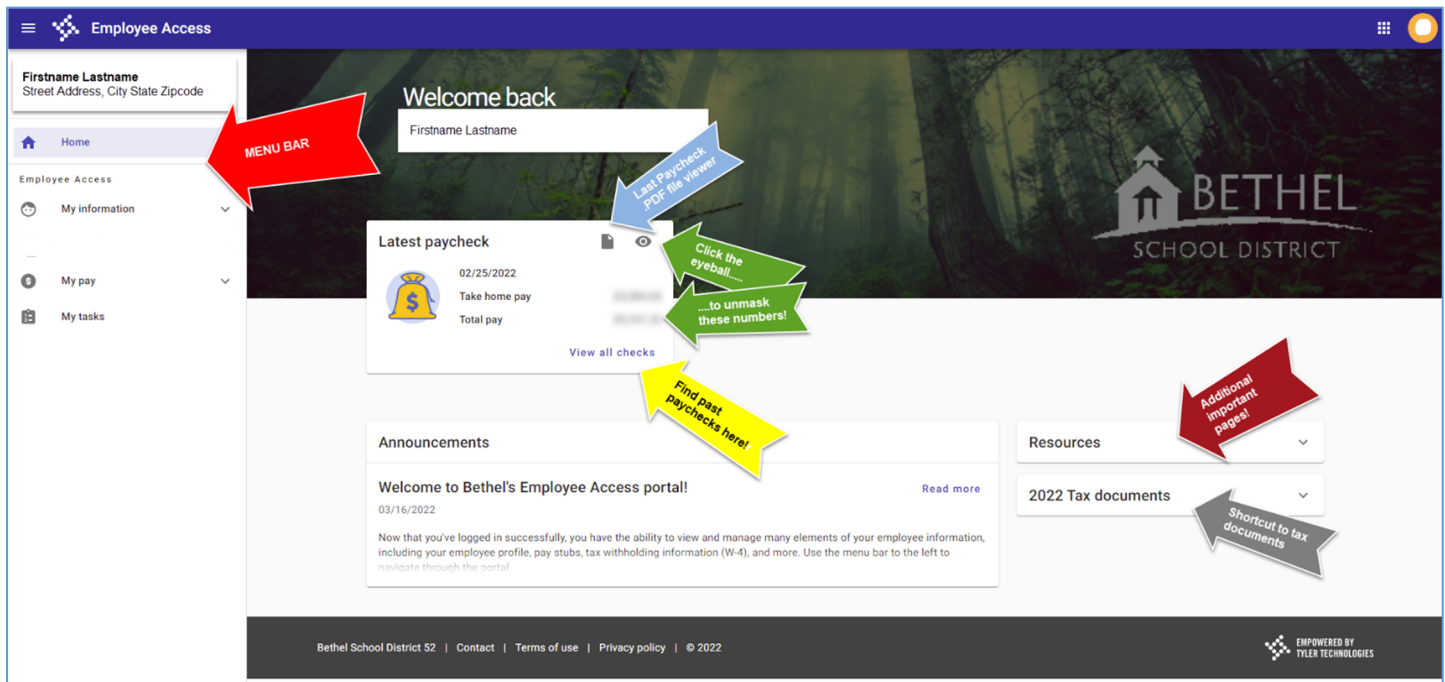**Last four of SSN:** Enter the last four digits of your social security number.
Birthdate: If not pre-populated, enter in the following format: mm/dd/yyyy
Zip Code: This is your home address, 5-digit zip code.

Click the Submit button when complete and a new screen will appear – the Employee Access dashboard:

Employee Access Dashboard Overview


- **Menu Bar**
  - *Home:* Returns to the Employee Access dashboard
  - *My Information:*
    - Profile – Defaults to the "<u>My info</u>" sub-page – a new page that reflects demographic information.
      - <u>Emergency Contacts</u> – if known, emergency names/phone numbers displayed here.
      - <u>*Dependents*</u> – *if this option is visible, it is not used by the District at this time and no information will be present.*
      - <u>Achievements</u> – Education, Certificates and Endorsements information displayed here.
  - *My Pay:*
    - Pay & tax information – Defaults to the "<u>Overview</u>" sub-page – a new page that reflects paycheck info, tax info & documents, position info, paycheck simulators and historical paycheck information.
      - <u>Year-to-date pay</u> – Pie chart visual representation of total pay and deductions.
      - <u>Compensation statement</u> – These pie chart visuals include Employer Paid Benefits and estimated value of leaves (typically, this reflects vacation pay only for those employees who <u>accrue</u> vacation leave) among other views. The pull-down menu allows you to drill down to more specific areas that update the pie-chart.
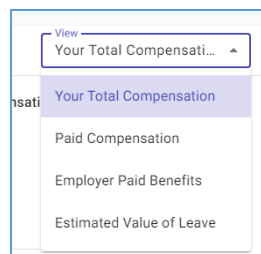
- o *My Tasks:*
    - Defaults to the "Documents" sub-page - a new page where any documents saved to the employee's record are stored (paychecks, tax documents, certificates, fillable forms, etc.).
        - Action Items – if this menu item displays, there is a form or contract or other actionable item requiring attention. The system may also default to this page initially.
        - Forms – User Defined Forms used by Bethel School District. More fillable electronic forms will be added here.

- **Latest Paycheck** – this area allows a snapshot from the most recent posted paycheck. Click the file icon to bring up a .pdf file of the most recent paystub. Click the 'eyeball-looking' icon to unmask "take home pay" and "total pay" values. "View all checks" link will re-route to the paycheck history page, making access to historical paychecks a breeze!

- **Resources** – a drop down menu with additional pages.
    - o **School ERP Pro** – formerly known as "iVisions Workflow". If **not** an authorized workflow user, logins will be restricted to this system.
    - o **Link to Bethel School District Homepage** – click to be taken to the district homepage.
    - o **Absence Management Login** – click to be taken directly to the Absence Management login page.
    - o **The Forms Library** – click to be taken to the Forms Library dashboard. District forms, required workplace postings, important employment links and other information is housed here.
    - o **Safety Committee Page** – Bethel School District's Safety Committee homepage. Committee member contact info, links, forms, meeting minutes and upcoming agendas.

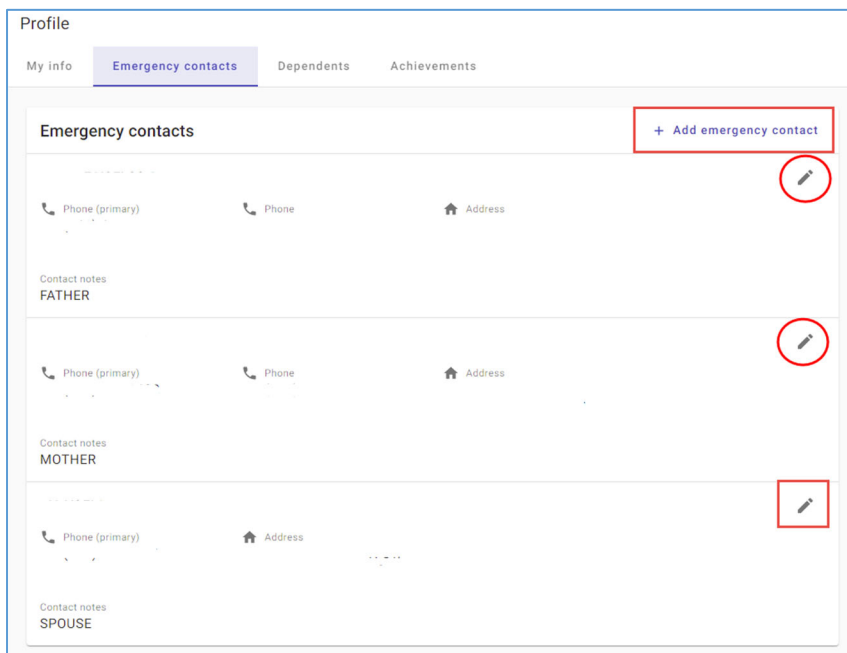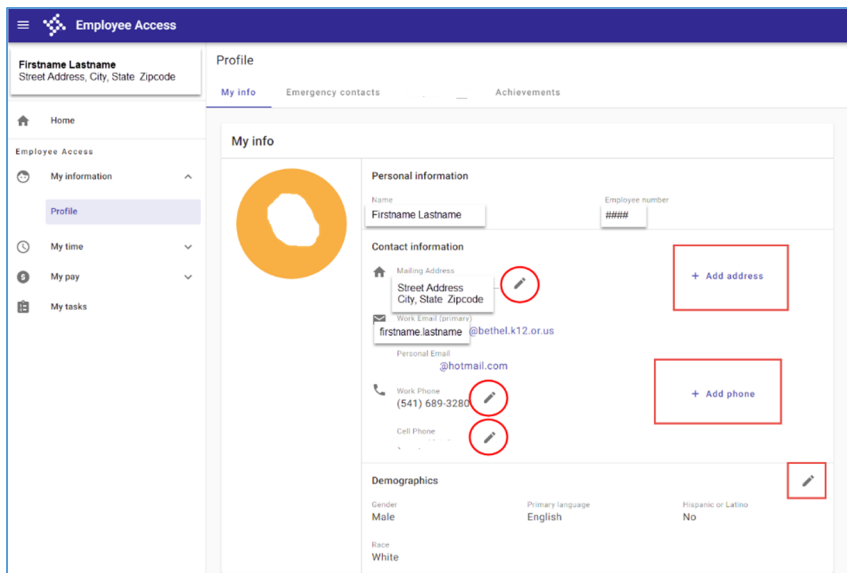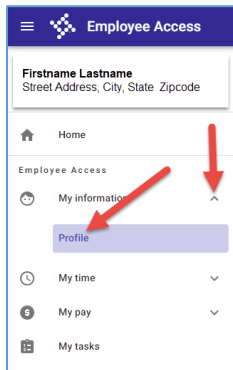- **20xx Tax Documents** – **Current** year tax documents would be quickly accessed here.
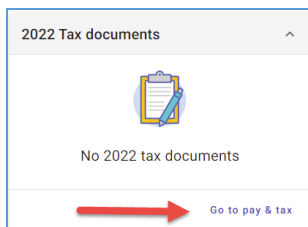
For *previous* tax year documents, click the "Go to Pay & Tax" link and then use the pulldown in the "Tax Documents" module to select the appropriate calendar year.
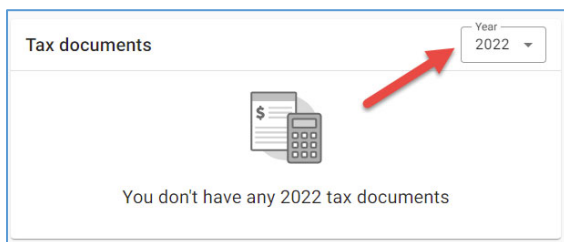
Changing Demographic Information

Path: Menu item "My Information" then select "Profile"

Anything with a "pencil" may be modified, and any area indicated with a "+ Add …" can be updated. For example, if a mailing address needs to be added to the residence address record, click on the "+ Add address" to enter the information.

Please Note – this isn't entirely an immediate process – many areas are subject to overnight processing.

- **Achievements tab/information:** Certifications and Education cannot be modified within the software by the end-user. The data shown here is a reflection of the information received by the district.
  - **Certifications:** Most commonly used to show licensed staff's TSPC license and endorsement information. May also contain items like: first aid/CPR certification, CDL licenses, or other professional licenses, certifications or documents.
  - **Education:** Transcripts or degree information is listed here. For licensed staff, submit official transcripts to update this area. For classified staff (typically for "Highly Qualified" reporting purposes), copies of a degree, copies of transcripts or even official transcripts are used to update this area.

Changing Taxes or Direct Deposit

Path: Menu item "My Pay" then select "Pay & tax information"
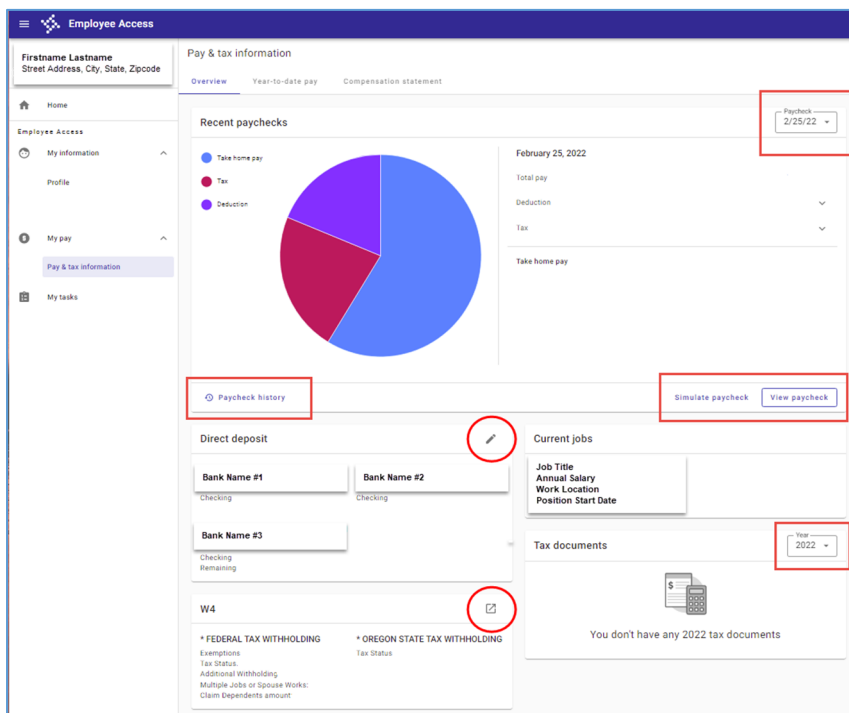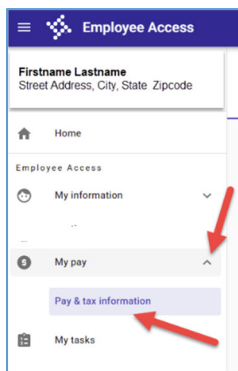
- Click the pencil icon in the Direct Deposit box to change or add direct deposit information. Bethel allows up to 5 bank accounts. For new direct deposits or account changes, "proof" will be required before the request is processed (as a safety precaution). The official bank documentation can be submitted in paper form to the business office or by attaching an image to the record in Employee Access.

- For W-4 changes, **Step 1** is to click the icon in the upper right corner of the W-4 box. A new browser window will open:

Select "guide me" to allow the system to walk you through both Federal and State forms. A new screen will appear:

This page will default the selections to "Help me determine which withholding forms apply to me". Leave those as-is and click the "continue" button.

- **Step 2** – At this point in the process, the system will walk you through a number of questions and tax setups based on your filing wishes. While it is not possible to adequately cover each and every scenario in this help document, pay special attention to the instructions and buttons on each page.

  After walking through all the appropriate screens, you will have a chance to review your document prior to submitting. The screen will look something like this:

Click the box, "Under penalties of perjury, I declare…" enter the last four digits of your social security number, and click the "submit form" button when complete. You may also choose to print these completed documents at this time for your records.

A confirmation page will appear. Click the "continue" button and you'll be taken to a new page.
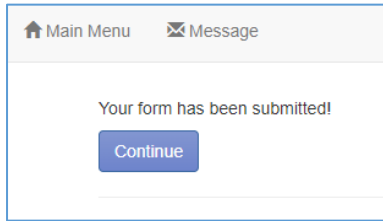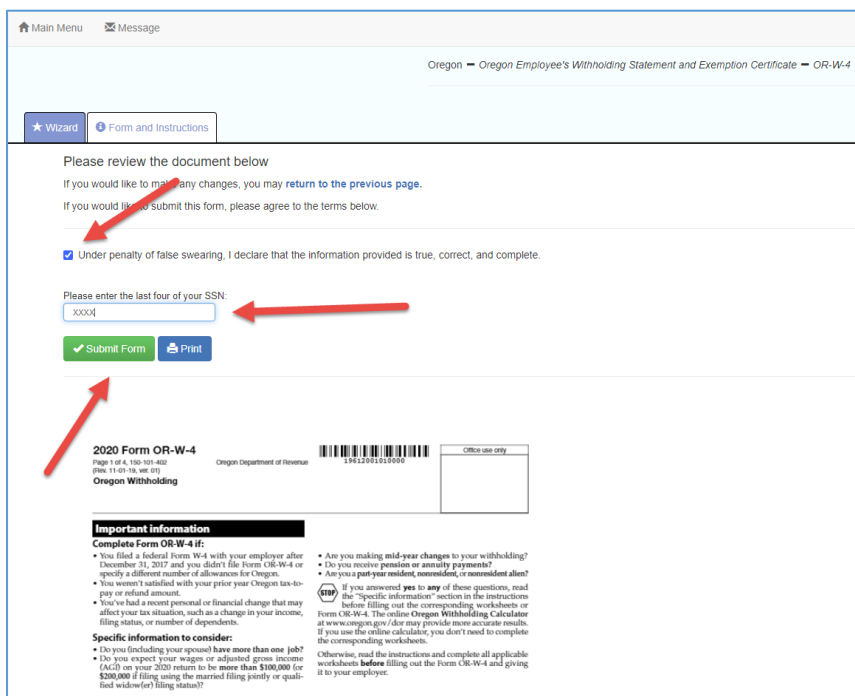

- **Step 3** – Change State W-4. This process will be very similar to changing the Federal tax withholdings.
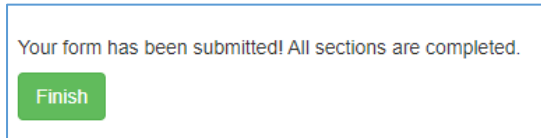

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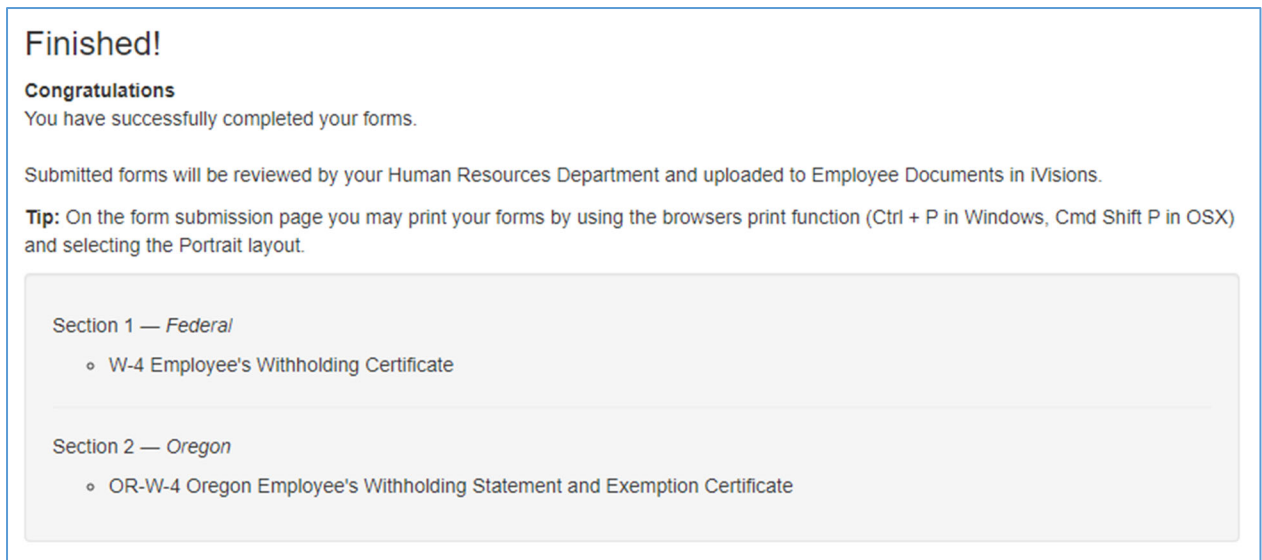
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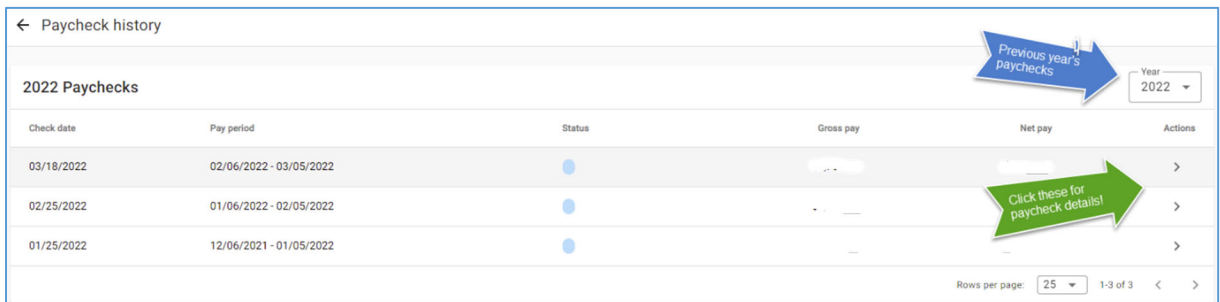
A confirmation page will appear.

Click the "Finish" button and you'll be taken to a new page.


To exit, close the browser page.

- Other functionality on the "overview" page:
  - Recent Paychecks pie-chart – select previous paychecks to update the pie chart.
 - Paycheck history – retrieve previous year's paystub copies.

  - Simulate Paycheck – this area provides the option to change settings within your paycheck and simulate results of those changes. Increase/decrease a voluntary contribution and see what your net take-home looks like? Change tax settings? Adjust insurance costs? Those answers can be discovered here.
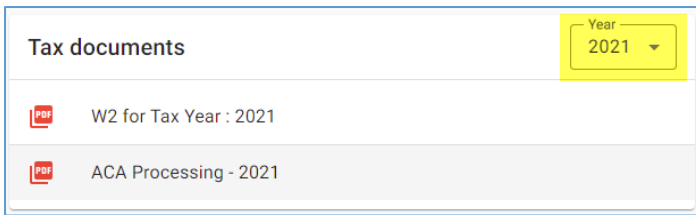
o View Paycheck – this option will open a new window with your most current paycheck in .pdf format. Downloading or printing the image are also available options.
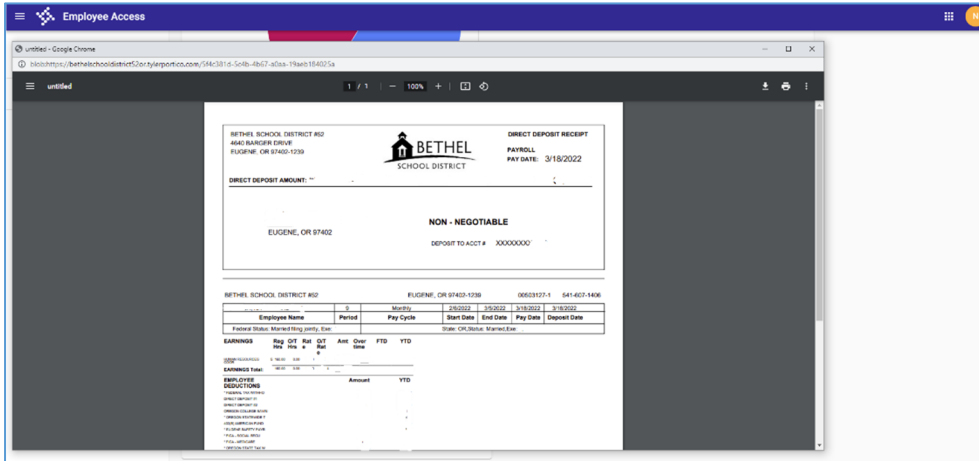
o Tax Documents module:
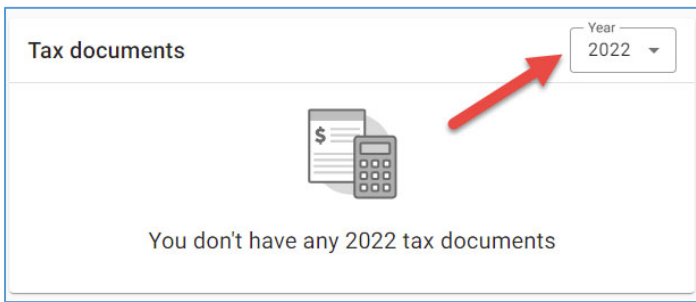
Defaults to the **current** calendar year view. For *previous* year's tax documents (W-2's, W-4's, 1095's, etc.), use the dropdown to select the appropriate year. Example:

Select a document to view it in a new window. Download and print options will be available within this new window.

Conclusion

If there are any questions that this document does not answer for you, do not hesitate to send an email to:

BSD-IV-DoNotReply@bethel.k12.or.us

to request assistance.

This document will be updated as new options and resources become available!