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Office of the Chief Financial Officer
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EmpowHR
Section 8 - Employee Self Service

PUBLICATIONS CATEGORY
HR and Payroll Processing

PROCEDURE MANUAL
EmpowHR

SECTION 8
Employee Self Service

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Employee Self Service

EmpowHR Employee Self Service (ESS) is a Web application offering employees direct online access to Human Resources (HR) information such as benefits and compensation data. ESS reduces the number of phone calls and paperwork in and out of the HR office. ESS provides the ability to initiate an online training request or other requests (e.g., address, email, emergency contact information, phone number, leave without pay (LWOP), change in work schedule). The requests are electronically submitted for approval to the appropriate individual(s). This allows the employee to take responsibility for data entry and accuracy of personal information.

ESS – Tasks

This section includes the following topics:

Career Plan

Note: This option is no longer used.

Exit Interview

To Enter Data for an Exit Interview:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.

3. Select the ***Exit Interview*** component. The Exit Interview page is displayed.

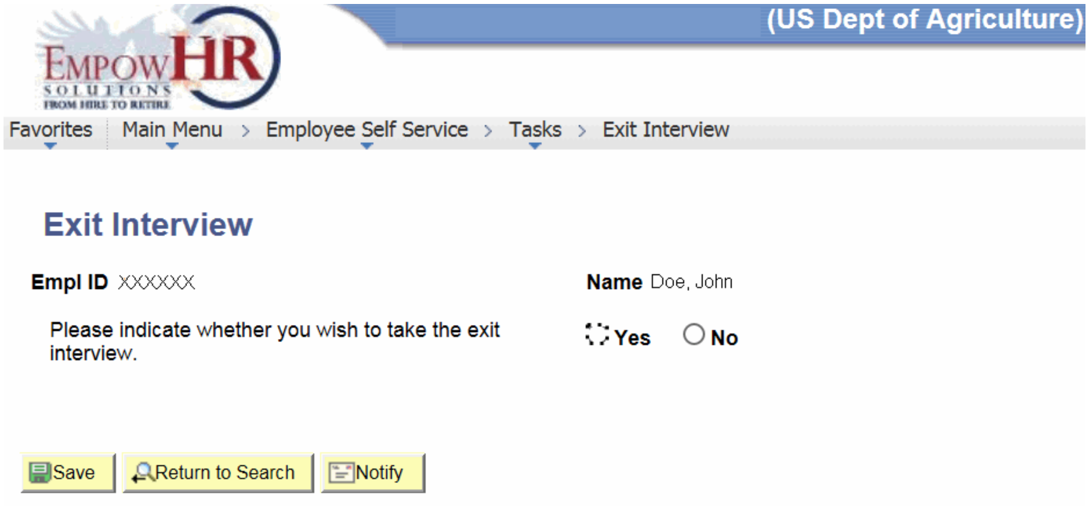


Figure 1: Exit Interview Page

4. Complete the fields as follows:

Field	Description/Instruction
Empl ID	Populated when the employee signs on to ESS.
Name	Populated when the employee signs on to ESS.
Please indicate whether you wish to take the exit interview.	Click the applicable radio button to indicate whether or not you want to take the exit interview.

5. Click **Yes** to take the exit interview. The Exit Interview is displayed.

6. Complete the question fields.

Note: On the Exit Interview, there are 103 questions that require selecting an option or completing a narrative. Answer all of the questions.

7. After answering all of the questions, complete the Date Completed field as follows:

Field	Description/Instruction
Date Completed	Enter the date the exit interview is completed or select a date from the calendar icon.

8. Click **Save**.

Job Classification Request

The ***Job Classification*** component allows the user to request the reclassification of an existing position. An employee can request their position to be reclassified or a manager can initiate a reclassification of a subordinate's position. This section provides the steps to request a job reclassification.

To Add or Update an Existing Job Classification Request:

1. Select the ***Employee Self Service*** menu group.

2. Select the ***Tasks*** menu.

3. Select the ***Job Classification Request*** component. The Classification Request page - Find an Existing Value tab is displayed.

Figure 2: Classification Request Page - Find an Existing Value Tab

4. Complete the fields as follows:

Field	Description/Instruction
Job Requisition	Enter the job requisition number or select data by clicking the search icon.
Requisition Status	Enter the applicable status or select data by clicking the search icon.

Field	Description/Instruction
Department	Enter the Department code or select data by clicking the down arrow.
Position Number	Enter the position number or select data by clicking the search icon.

5. Click **Search**. The Job Classification Request page is displayed.

   OR

   Click **Clear** to clear the entry.

   OR

   Select the ***Add a New Value*** tab. The Classification Request page - Add a New Value tab is displayed.

Figure 3: Classification Request Page - Add a New Value Tab

6. Complete the field as follows:

Field	Description/Instruction
Job Requisition	Enter the number of the job requisition to be added.

7. Click **Add**. The Job Classification Request page is displayed.

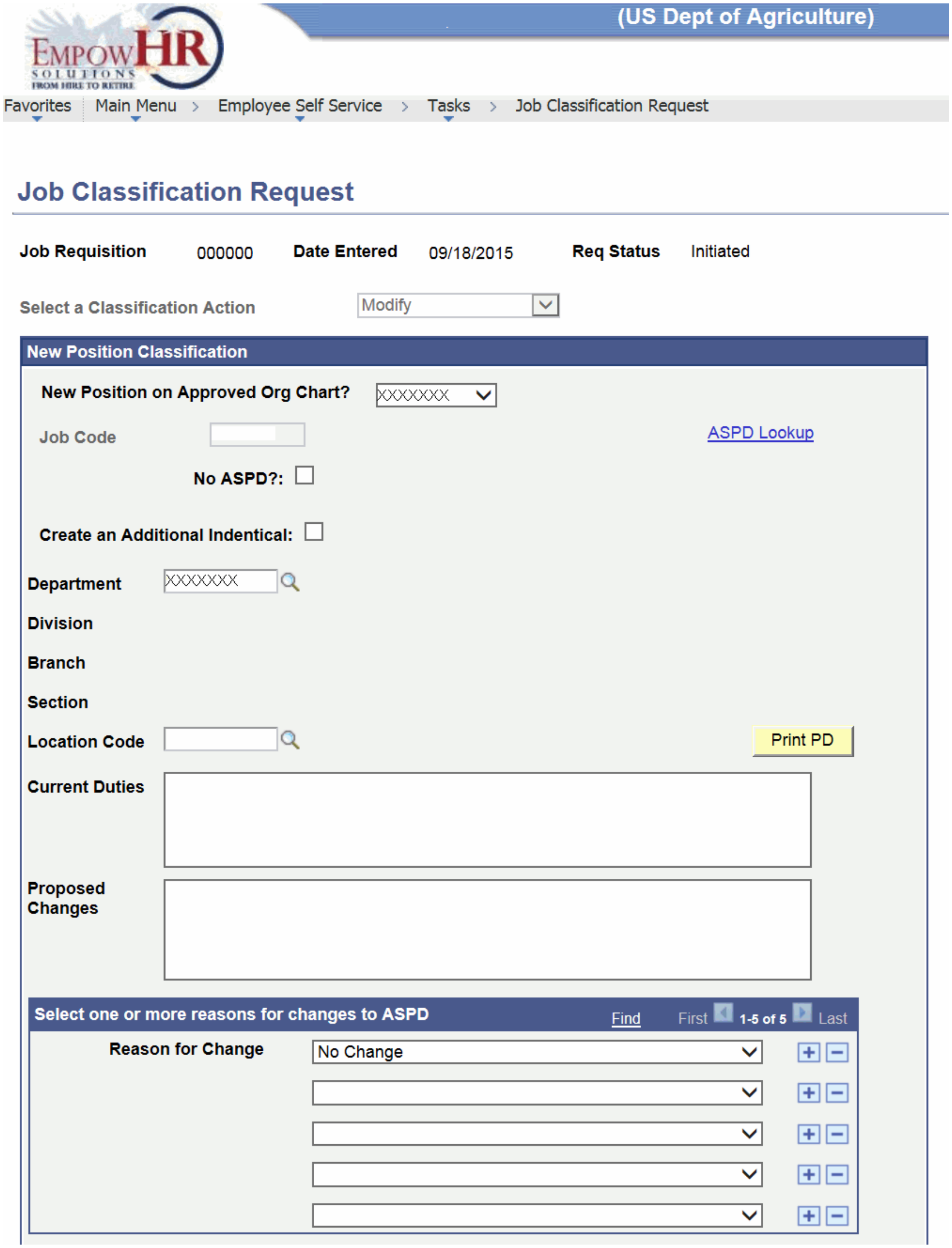


Figure 4: Job Classification Request Page

8. Complete the fields as follows:

Note: Some of the fields on this page are populated from other pages and cannot be modified.

Field	Description/Instruction
Job Requisition	Populated.
Date Entered	Populated with the system date or the current date and cannot be changed.
Req Status	Populated.
Select a Classification Action	Defaults to **Update** and cannot be changed.
New Position Classification	**Description/Instruction**
New Position on Approved Org Chart?	Select the applicable value from the drop-down list.
Job Code	Populated based on the position number selected.
No ASPD?	Check this box if the job being classified is not an Agency Standard Position Description (ASPD).
Create an Additional Identical	Check this box to create an additional job classification identical to the one currently being created.
Department	Enter the applicable Department code or search for a code by clicking the search icon.
Division	Populated.
Branch	Populated.
Section	Populated.
Location Code	Enter the applicable location code or search for a code by clicking the search icon. The literal is displayed to the right of the field.
Current Duties	Enter the current duties of the job being classified.
Proposed Changes	Enter the proposed changes for the position being classified.
Select one or more reasons for changes to ASPD	**Instruction**
Reason for Change	Select the applicable reason for changing the job to ASPD from the drop-down list.

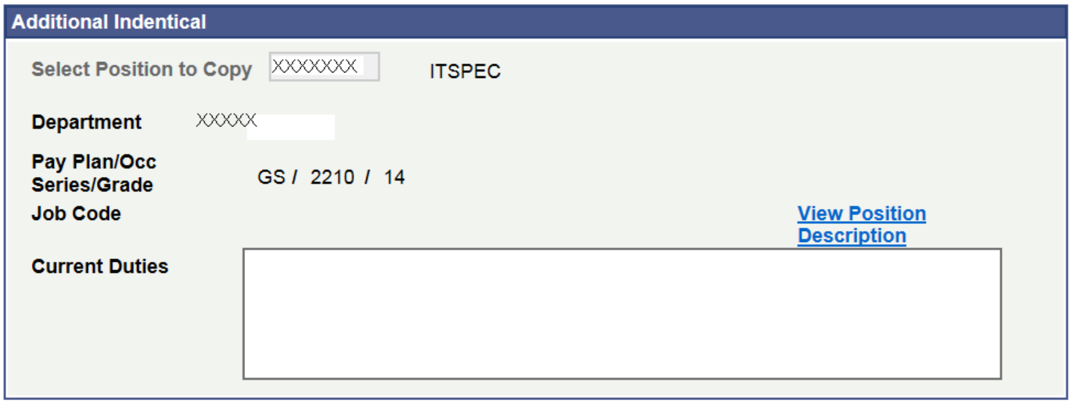


Figure 5: Job Classification Request Page (Additional Identical)

Field	Description/Instruction
Additional Identical	
Select Position to Copy	Enter the position number of the position to copy. The name of the position is displayed to the right of the number.
Department	Populated with the Department code.
Pay Plan/Occ Series/Grade	Populated with the pay plan, occupational series, and grade.
Job Code	Populated with the job code.
Current Duties	Populated with the current duties of the position.

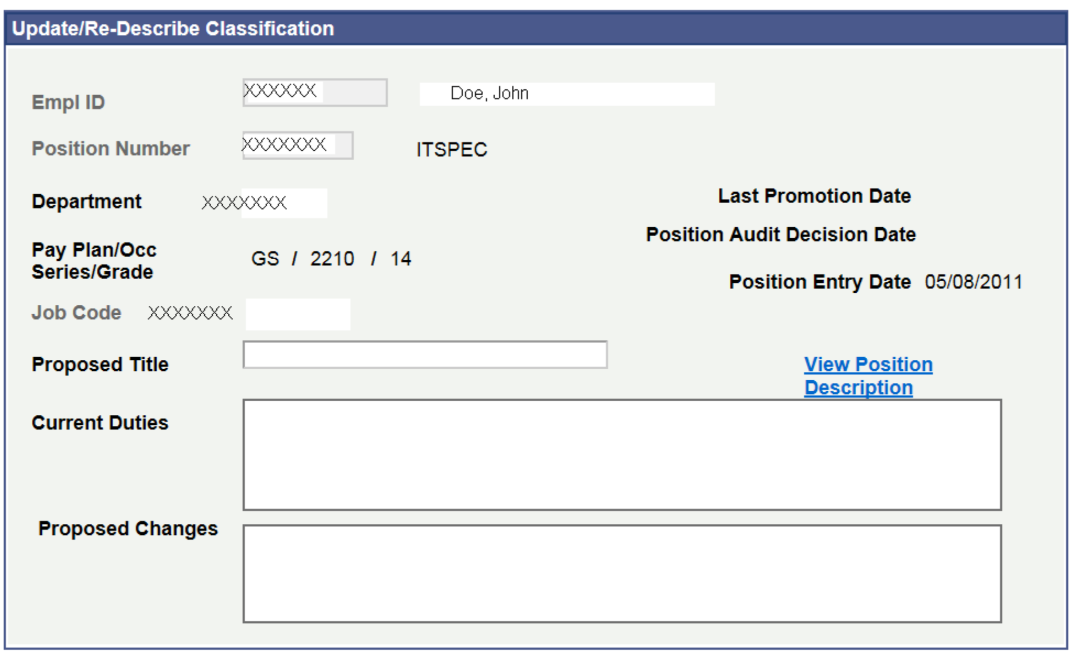


Figure 6: Job Classification Request Page (Update/Re-Describe Classification)

Field	Description/Instruction
Update/Re-Describe Classification	**Description/Instruction**
Empl ID	Populated with the user's employee identification (Empl ID) number. The name is displayed to the right of the number.
Position Number	Populated with the user's position number. The position name is displayed to the right of the number.
Department	Populated with the Department code.
Last Promotion Date	Populated with the last promotion date, if applicable.
Position Audit Decision Date	Populated with the audit decision, if applicable.
Pay Plan/Occ Series/Grade	Populated with the pay plan, occupational series, and grade.
Position Entry Date	Populated with the date that the employee entered the position.
Job Code	Populated with the job code of the job being classified.
Proposed Title	Enter the proposed title of the job.
Current Duties	Enter the current duties of the job.
Proposed Changes	Enter the proposed changes to the job duties.

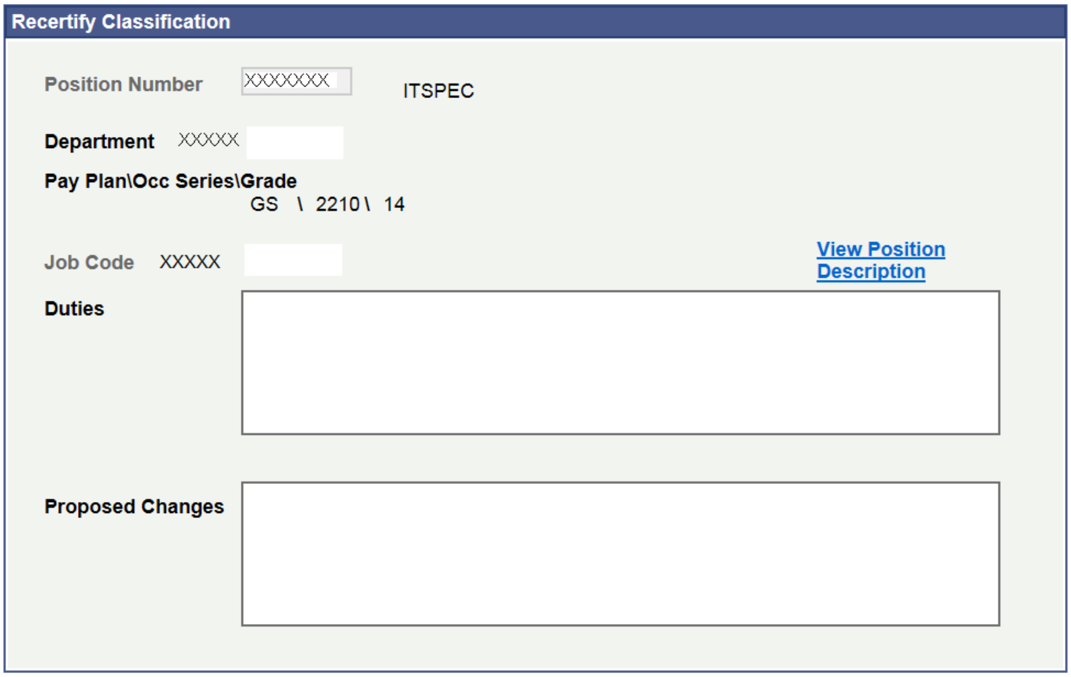


Figure 7: Job Classification Request Page (Recertify Classification)

Field	Description/Instruction
Recertify Classification	**Description/Instruction**
Position Number	Populated with the user's position number. The position name is displayed to the right of the number.
Department	Populated with the Department code.
Pay Plan/Occ Series/Grade	Populated with the pay plan, occupational series, and grade.
Job Code	Populated with the job code of the job being classified.
Duties	Enter the duties of the job.
Proposed Changes	Enter the proposed changes to the job duties.

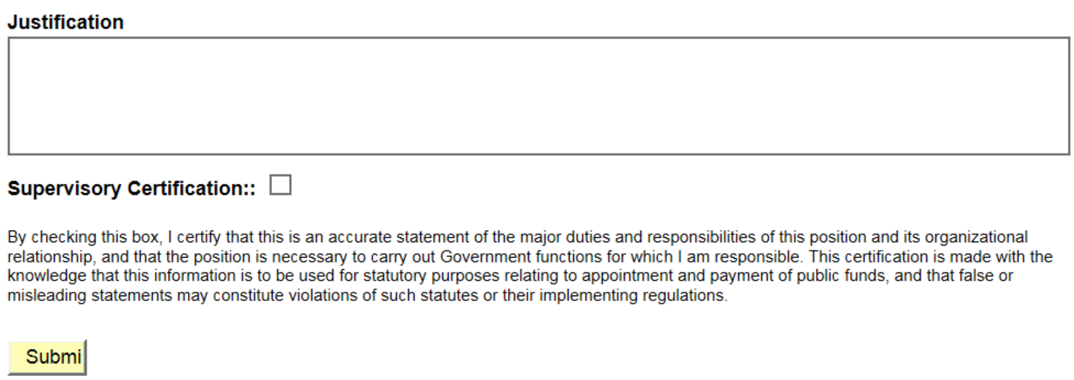


Figure 8: Job Classification Request Page (Justification)

Field	Description/Instruction
Justification	Enter the justification for the change.
Supervisory Certification	Check this box after the request has been certified by the supervisor.

9. Click **Submit**. The request is entered into the workflow for approval and processing. *Your Position Request Has Been Entered Into Workflow (99999999,999)* is displayed.

10. Click **OK**. The Job Requisition and the Requisition Status have changed. The approver (the Manager of the request's Initiator) will receive an email, and the job requisition will become a workflow item on their worklist.

Note: You can click **Print PD** to print a copy of the job description.

Personnel Actions

In the ***Personnel Actions*** component, you can view or print your Standard Form (SF) 50B, Notification of Personnel Action.

To Enter a Personnel Action:

1. Select the ***Employee Self Service*** menu group.

2. Select the ***Tasks*** menu.

3. Select the ***Personnel Actions*** component. The Personnel Actions page is displayed.

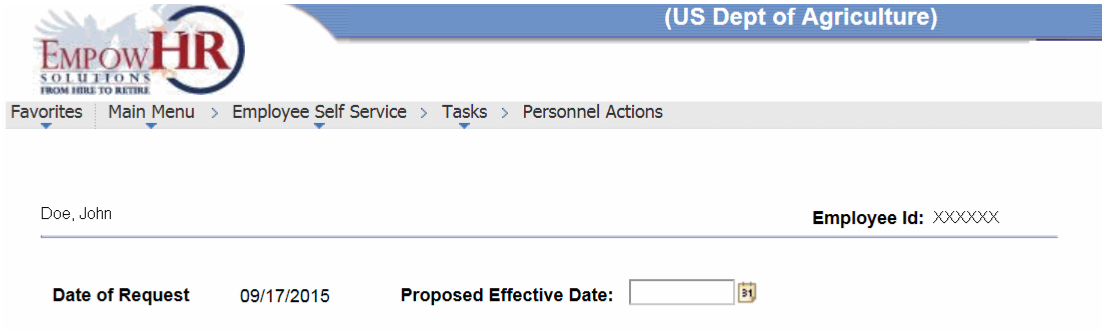


Figure 9: Personnel Actions Page

4. Select the applicable date. The Personnel Actions page (PAR Category) is displayed.

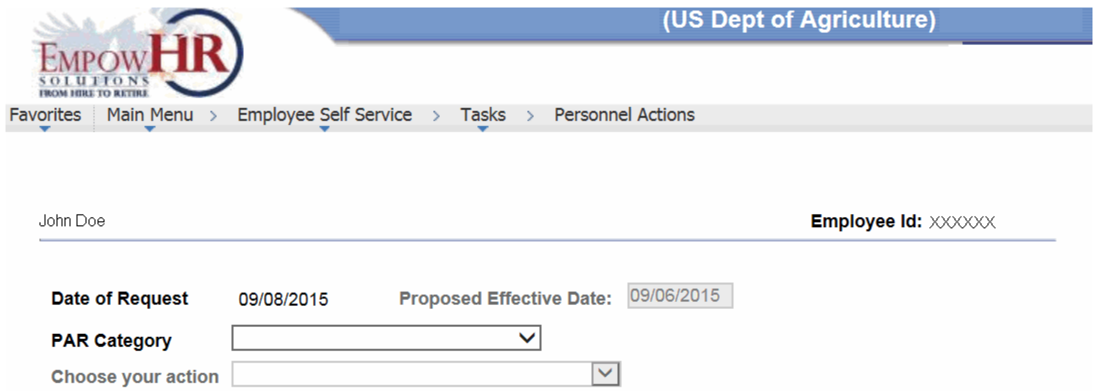


Figure 10: Personnel Actions Page (PAR Category)

5. Complete the fields as follows:

Field	Description/Instruction
Date of Request	Populated.
Proposed Effective Date	Populated based upon the date selected above.
PAR Category	Select the applicable category from the drop-down list.
Choose your action	Select data from the drop-down list. The valid values for this field depend on the selection made on the PAR Category field.

The applicable Personnel Actions page is displayed. The fields on this page are dependent on the PAR Category and Choose Your Action selections.

6. Complete the fields as follows:

Field	Description/Instruction
Date of Request	Populated.

Field	Description/Instruction
Proposed Effective Date	Populated with the date entered on the Personnel Action Proposed Effective Date page.
***PAR Category**	Required field. Populated with the selection on the Personnel Action PAR Category page.
***Choose your action**	Required field. Populated with the selection on the Personnel Action PAR Category page.
Position	Populated.
Department	Populated.
Location	Populated.
Job Code	Populated.
Type of Appt	Populated.
PP/Series/Grade	Populated.
Standard Hours	Populated.
Work Schedule	Populated.
Action Status	Populated.
GLOC Code	Enter the geographic location code (GLOC).
City	Populated based upon the GLOC entered.
State	Populated based upon the GLOC entered.
County	Populated based upon the GLOC entered.
Justification	Enter the justification for the action.

7. Click **Submit** to submit the personnel action. The Workflow Confirmation popup appears.
8. Click **OK**. The Successfully Saved Confirmation popup appears.
9. Click **OK**.

Skills Information

Provided below are instructions for selecting the applicable skill to enter skills information.

To Enter Skills Information Data:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu
3. Select the ***Skills Information*** component. The Skills Information page is displayed.

Figure 11: Skills Information Page

4. Select the applicable skill type to be entered/updated.

Education

To Enter Education Data:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.

3. Select the ***EmpowHR Education*** component. The Education page is displayed.

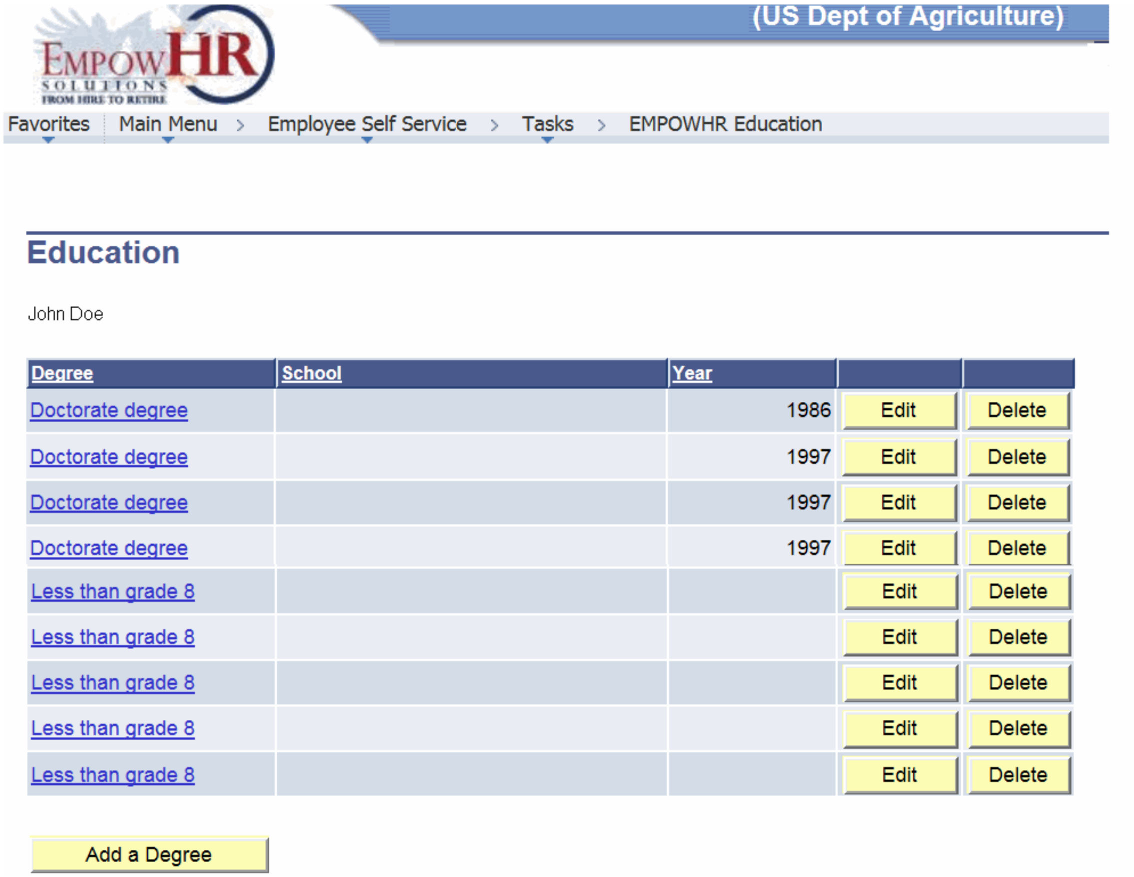


Figure 12: Education Page

4. Click **Add a Degree**. The Education Detail page is displayed.

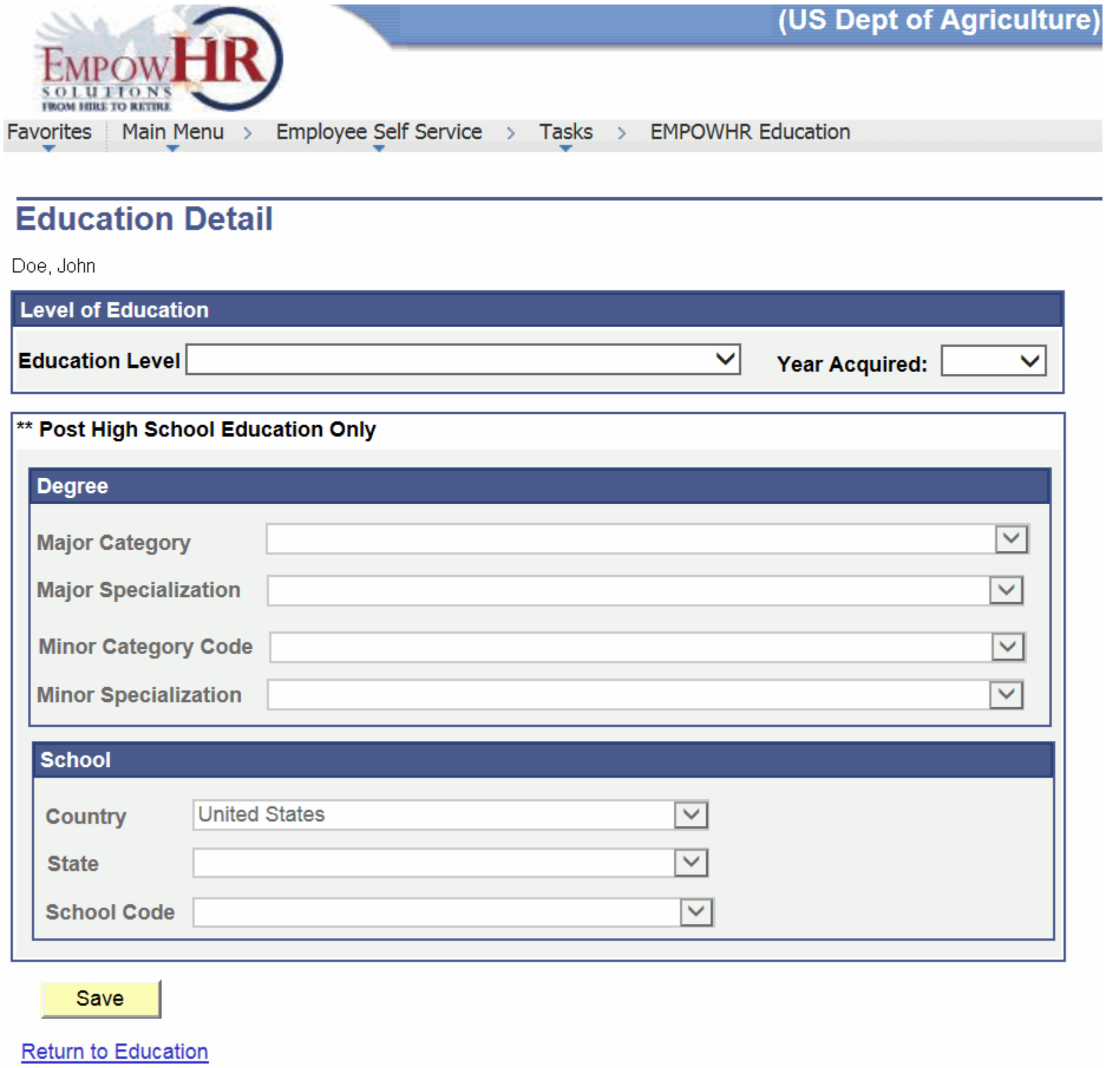


Figure 13: Education Detail Page

5. Complete the fields as follows:

Field	Description/Instruction
Level of Education	**Description/Instruction**
Education Level	Identifies the employee's highest level of education based on the number of years of formal schooling and/or academic degrees or certificates. Select the applicable data from the drop-down list.
Year Acquired	Select the applicable year from the drop-down list. This field is used to identify the calendar year during which the employee received the degree or certificate shown for the education level.
****Post High School Education Only**	**Description/Instruction**

Field	Description/Instruction
Degree	
Major Category	Select the applicable education major from the drop-down list. The Education Major field identifies the employee's major field of study beyond high school.
Major Specialization	Select the applicable specialization from the drop-down list.
Minor Category Code	Select the applicable minor area of study from the drop-down list. This field identifies the employee's minor field of study beyond high school.
Minor Specialization	Select the applicable minor specialization from the drop-down list.
School	**Description/Instruction**
Country	Defaults to `United States`. To change the data select from the drop-down list.
State	Select the applicable State/province from the drop-down list.
School Code	Select the applicable school code from the drop-down list.

6. Click **Save**. The Save Confirmation popup appears.

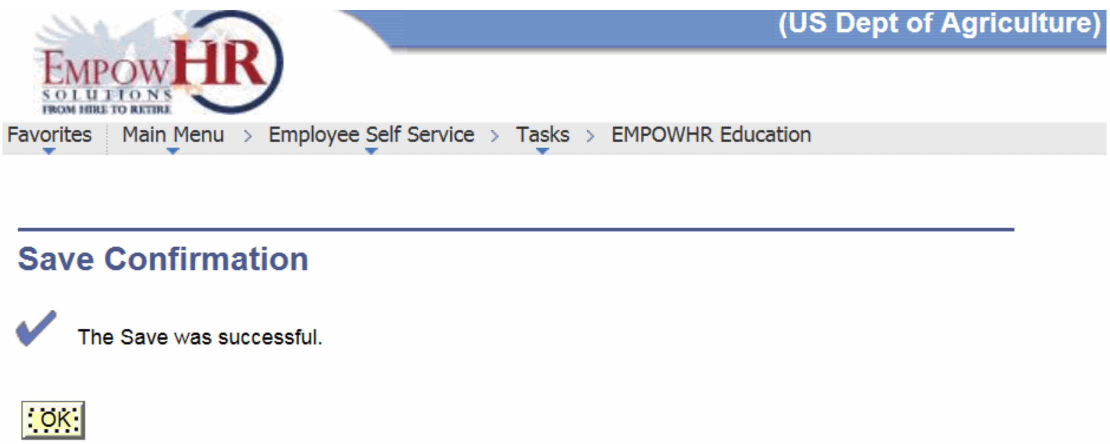


Figure 14: Save Confirmation Popup

7. Click **OK**. The Education page is displayed with the new information added.

Payroll Documents

The ***Payroll Documents*** module of EmpowHR contains payroll and benefits-related information. Employees can access and update data. The ESS Payroll Documents have additional instructions in the application to mimic the Employee Personal Page.

For more information see:

Charitable Contributions

A charitable contribution is the authorization by an employee to withhold, through payroll deductions, contributions for the Combined Federal Campaign (CFC).

Any employee whose duty station is located within an approved CFC area, and whose net pay is sufficient to cover the allotment, may authorize payroll deductions for charitable contributions. Included are employees whose appointments are limited to 1 year or less, provided an appropriate official of the employing Agency determines the employee will continue employment for a period sufficient to justify the allotment. The allotment will be an equal amount deducted each pay period (minimum $1.00). The allotment will be for a term of 1 year beginning with the first pay period that begins in January and ending with the last pay period that begins in December.

No deductions are made for any pay period in which the employee's net pay is insufficient to cover the deduction amount. No adjustments are made in subsequent pay periods to make up for missed deductions.

All CFC contributions are automatically discontinued upon expiration of the 1-year withholding period, death, retirement, or separation from Federal service.

Following are guidelines for processing charitable contribution data:

- Regulations require CFC designation to be processed by December 1. However, entries received after that date will be processed.
- One-time cash contributions are not entered in EmpowHR. The contribution is made in accordance with the Agency CFC instructions.
- An employee may discontinue an allotment at any time by submitting a signed letter or memorandum to the personnel office. The document must include the employee's name, the amount, and the organization from which the contribution is being revoked. The discontinuance is effective the first pay period beginning after receipt of the written revocation.

- The Office of Personnel Management (OPM) regulations provide that allotment authorizations be transferred when an employee moves to an organization serviced by a different payroll office. A new authorization form should be completed only if an authorization was in effect with the losing Department on the date of transfer.
- The maximum number of charitable contribution records allowed is four.

This example will show how to enter data for an employee who wants to (1) authorize, (2) change, or (3) cancel biweekly payroll deductions for charitable contributions to CFC.

For more information see:

Entering/Changing/Canceling Charitable Contribution Data

To Add/Change/Cancel Charitable Contribution Data:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Payroll Documents*** component.

4. Select **Modify Charitable Contribution**. The Charitable Contribution tab is displayed.

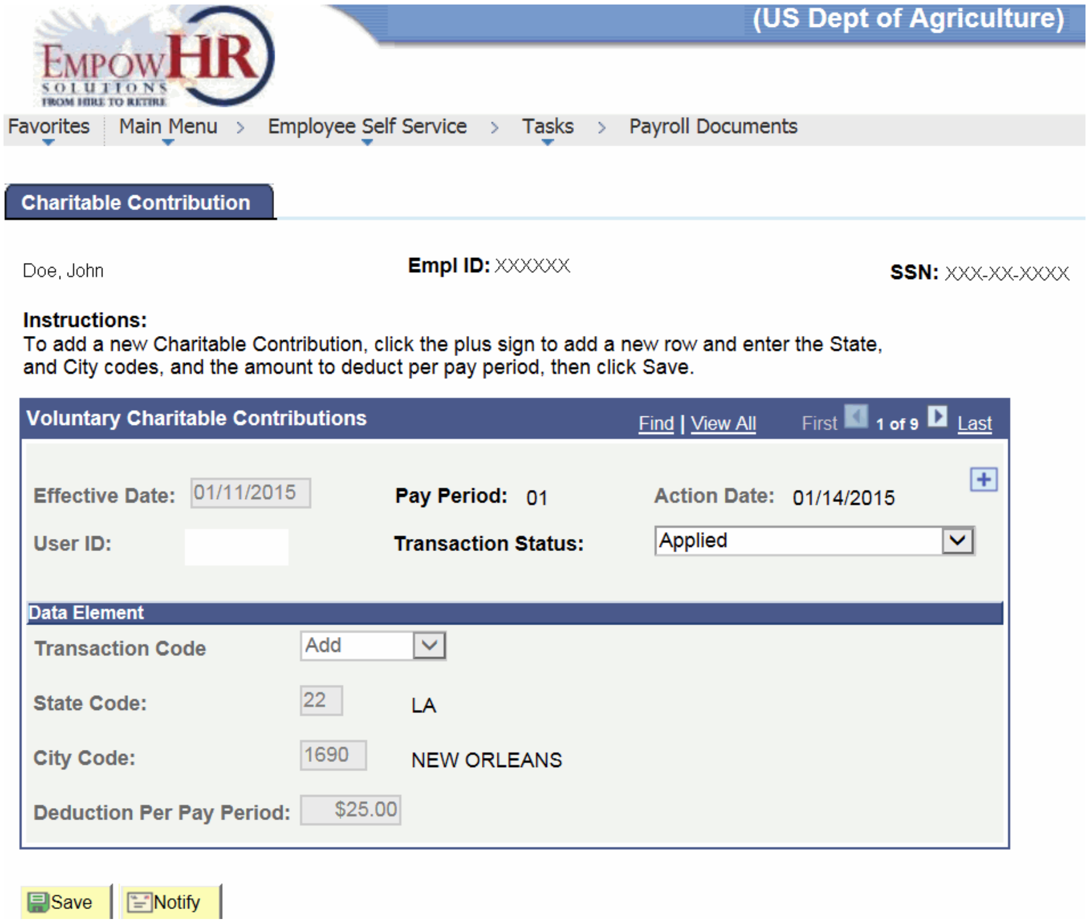


Figure 15: Charitable Contribution Tab

5. Complete the fields as follows:

Field	Description/Instruction
Empl ID	Populated when the employee signs on to ESS.
SSN	Populated with the Social Security number (SSN) when the employee signs on to ESS.
Voluntary Charitable Contributions	**Description/Instruction**
Effective Date	Populated with the effective date of the action.
Pay Period	Populated with the coordinating pay period.
Action Date	Populated and cannot be changed.
User ID	Populated when the employee signs on to ESS.

Field	Description/Instruction
Transaction Status	Populated with the current status of the transaction. When the transaction is saved, the status will change.
Data Element	**Instruction**
Transaction Code	Select the applicable information from the drop-down list. The valid values are **Add**, **Change**, and **Delete**. Note: This field can only be completed when the Effective Date is within an open season.
State Code	Enter the State code or select data by clicking the search icon. Note: This field can only be completed when the Effective Date is within an open season.
City Code	Enter the city code or select data by clicking the search icon. Note: This field can only be completed when the Effective Date is within an open season.
Deduction Per Pay Period	Enter the amount of charitable deduction to be withheld per pay period. Note: This field can only be completed when the Effective Date is within an open season.

6. Click **Save**.
7. Click **OK**.

Direct Deposit

Direct Deposit allows the transfer of net pay into a checking or savings account at a financial organization through direct deposit/electronic funds transfer (DD/EFT). It is the employee's pay after deductions, which is transmitted through DD/EFT to a financial organization. A net pay allotment is the direct deposit of net pay into a checking or savings account at a financial organization through DD/EFT.

Before beginning the following information in needed:

- Bank routing number.
- Employee's account number.
- Type of account (savings or checking) into which the deposit will be made.

For more information see:

Changing Net Pay

Once the employee is participating in direct deposit, an employee can:

- Change the depositor account number
- Change from a checking to a savings account or vice versa
- Change from one financial organization to another
- Change the routing number of a financial organization

Canceling Net Pay

To cancel a direct deposit authorization, enter the new check mailing address data or designated agent code in the Employee Address document, you must enter the new check mailing address or designated agent number; otherwise, the salary will continue to be disbursed to the financial organization through DD/EFT.

To Cancel Net Pay Data:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Payroll Documents*** component.

4. Select ***Modify Direct Deposit***. The Direct Deposit tab is displayed.

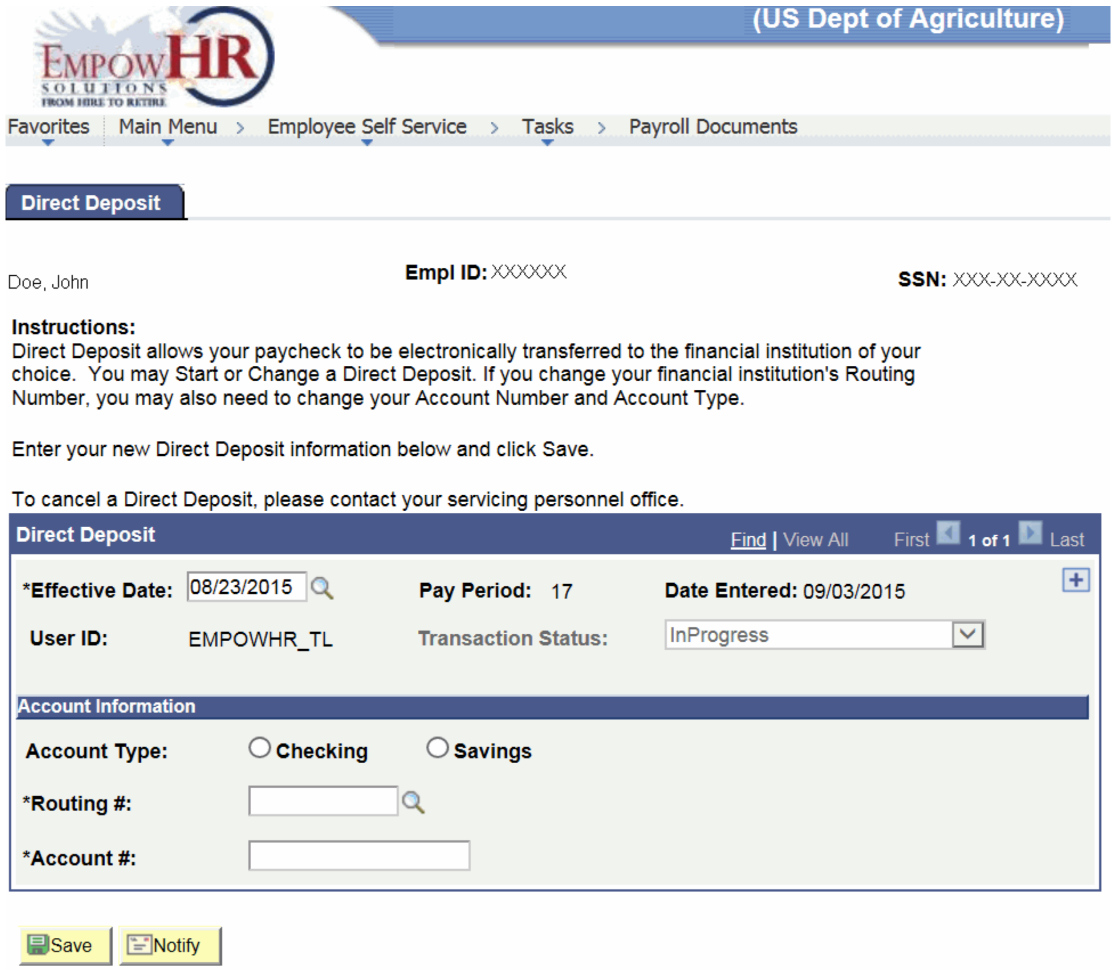


Figure 16: Direct Deposit Tab

5. Complete the fields as follows:

Field	**Description/Instruction**
Empl ID	Populated when the employee signs on to ESS.
SSN	Populated when the employee signs on to ESS.
Direct Deposit	**Description/Instruction**
***Effective Date**	Required field. Populated with the beginning date of the current pay period. This field can be changed by clicking the search icon.
Pay Period	Populated with the coordinating pay period.
Date Entered	Populated with the date entered.
User ID	Populated when the employee signs on to ESS.

Field	Description/Instruction
Transaction Status	Defaults to `In Progress` and reflects the status of the transaction. The transaction status will change when the transaction is saved, is in suspense, or resent to NFC.
Account Information	Select the applicable type of account.
Account Type	**Instruction**
***Routing #**	Required field. Enter the routing number of the bank or select data by clicking the search icon.
***Account #**	Required field. Enter the account number of the direct deposit.

6. Click **Save**.
7. Click **OK**.

Federal Tax Data

Federal tax is withheld through payroll deductions based on the processing of the Internal Revenue Service (IRS) Form W-4, Employee's Withholding Allowance Certificate. Federal income tax withholding is based on an IRS formula that includes a calculation of Thrift Savings Plan (TSP) contributions, the number of allowances claimed, and a tax-withholding table for marital status. From this calculation, the tax amount is determined based on the taxable income amount and the tax percentage.

Federal income tax is withheld based on the processing of Form W-4. If a W-4 is not processed, Federal income tax will automatically be withheld at the rate of single with zero exemption until a W-4 is processed.

A Federal income tax certificate does not need to be processed for employees reassigning to another Agency serviced by NFC within the same Department. However, employees transferring from one Department to another Department serviced by NFC must submit a new W-4 at the time the accession action is processed.

An employee may choose to claim exempt if no Federal tax was owed the prior year and the employee does not expect to owe any tax in the current year. The employee must file a W-4 before February 15 of each year if total exemption is claimed. Otherwise, tax withholding will automatically be withheld based on single with zero exemptions.

Note: Employees whose duty station is the Republic of Panama, Virgin Islands, Guam, or the Northern Mariana Islands, may be exempt from Federal income tax. If exempt, the employee must file a W-4 indicating Exempt status.

Before beginning, the following information is needed:

- Marital status of the employee.
- Total number of tax exemptions to be claimed by the employee.
- Any additional withholding amount (in dollars and cents).

Note: This is an optional field.

For more information see:

Entering/Changing/Canceling Federal Tax Data

To Enter/Change/Cancel Federal Tax Data:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Payroll Documents*** component.

4. Select **Modify Federal Tax**. The Federal Tax tab is displayed.

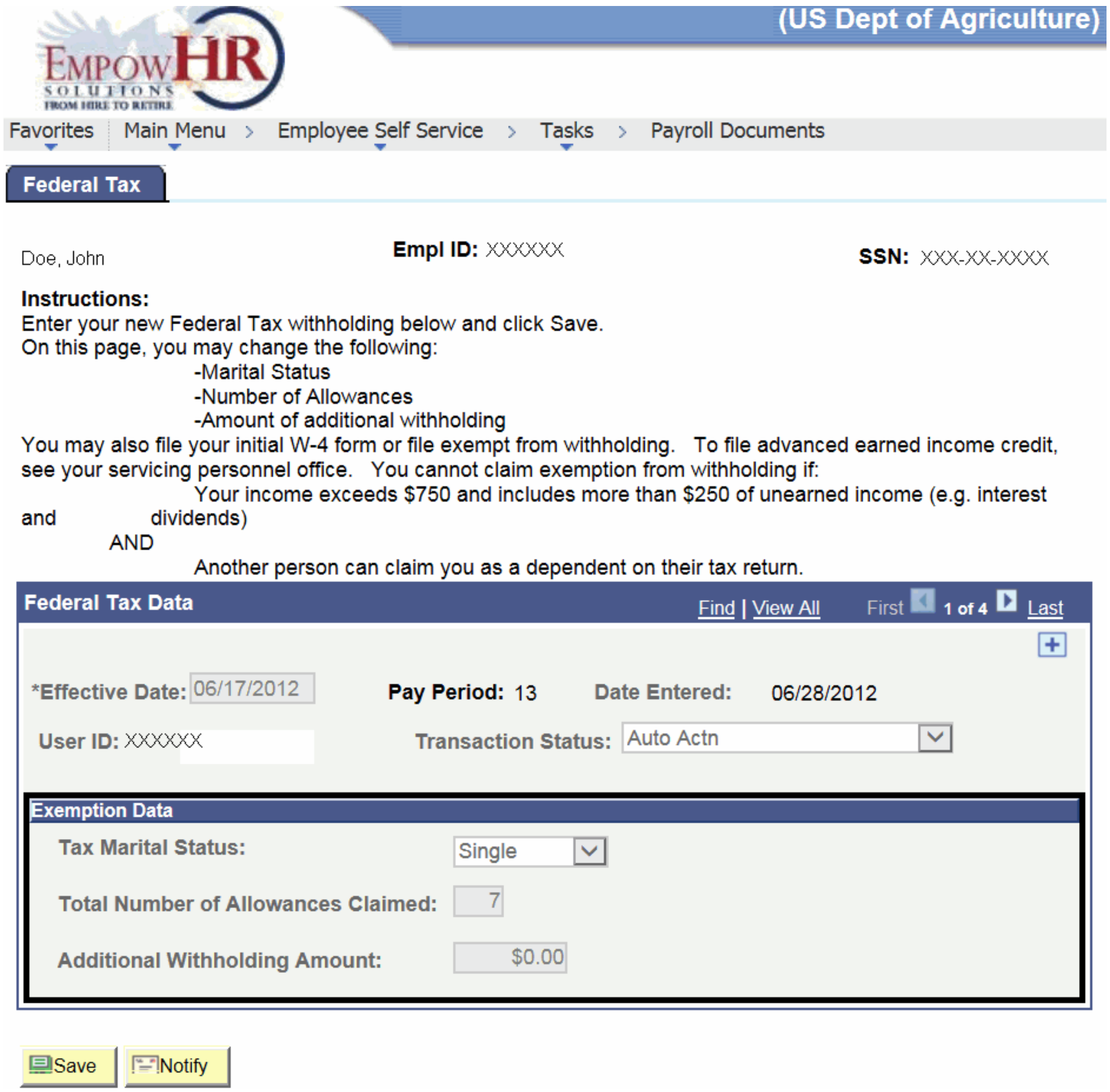


Figure 17: Federal Tax Tab

5. Complete the fields as follows:

Field	Description/Instruction
Empl ID	Populated when the employee signs on to ESS.
SSN	Populated when the employee signs on to ESS.
Federal Tax Data	**Description/Instruction**
***Effective Date**	Required field. Populated with the beginning date of the current pay period. This field can be changed by clicking the search icon.
Pay Period	Populated with the coordinating pay period.

Field	Description/Instruction
Date Entered	Populated with the date that the information was entered.
User ID	Populated when the employee signs on to ESS.
Transaction Status	Defaults to `In Progress` and reflects the status of the transaction. The transaction status will change when the transaction is saved, is in suspense, or resent to NFC.
Exemption Data	**Instruction**
Tax Marital Status	Select the tax marital status from the drop-down list.
Total Number of Allowances Claimed	Enter the number of exemptions.
Additional Withholding Amount	Enter the additional amount (dollar amount) to be withheld in addition to the Total Number of Allowances Claimed.

6. Click **Save**.
7. Click **OK**.

Financial Allotments

Financial Allotments are voluntary deductions to financial institutions with direct deposit. This does not include such items as charity, thrift savings, garnishments, union, or other organizational dues. For these changes, see your personnel office.

In order to participate in a Health Savings Plan, you must participate in a High Deductible Health Plan, have no other insurance coverage other than those specifically allowed (e.g., disability, dental, vision, long-term care, and limited expense flexible spending accounts) and not be claimed as a dependent on someone else's tax return. Filing jointly as a spouse does not mean you are a dependent on your spouse's tax return. You cannot contribute to an Health Savings Account (HSA) if you participate in a general-purpose health care flexible spending account (HCFSA), a spouse's HCFSA, a spouse's family enrollment in other non-high deductible health insurance coverage, TRICARE, Medicare, or have received Department of Veterans Affairs (VA) benefits within the previous 3 months.

For more information see:

Entering/Changing/Canceling Financial Allotments

To Enter/Change/Cancel Financial Allotments:

1. Select the ***Employee Self Service*** menu group.

2. Select the ***Tasks*** menu.

3. Select the ***Payroll Documents*** component.

4. Select **Modify Financial Allotment/Health Sav**. The Financial Allotment/Health Sav tab is displayed.

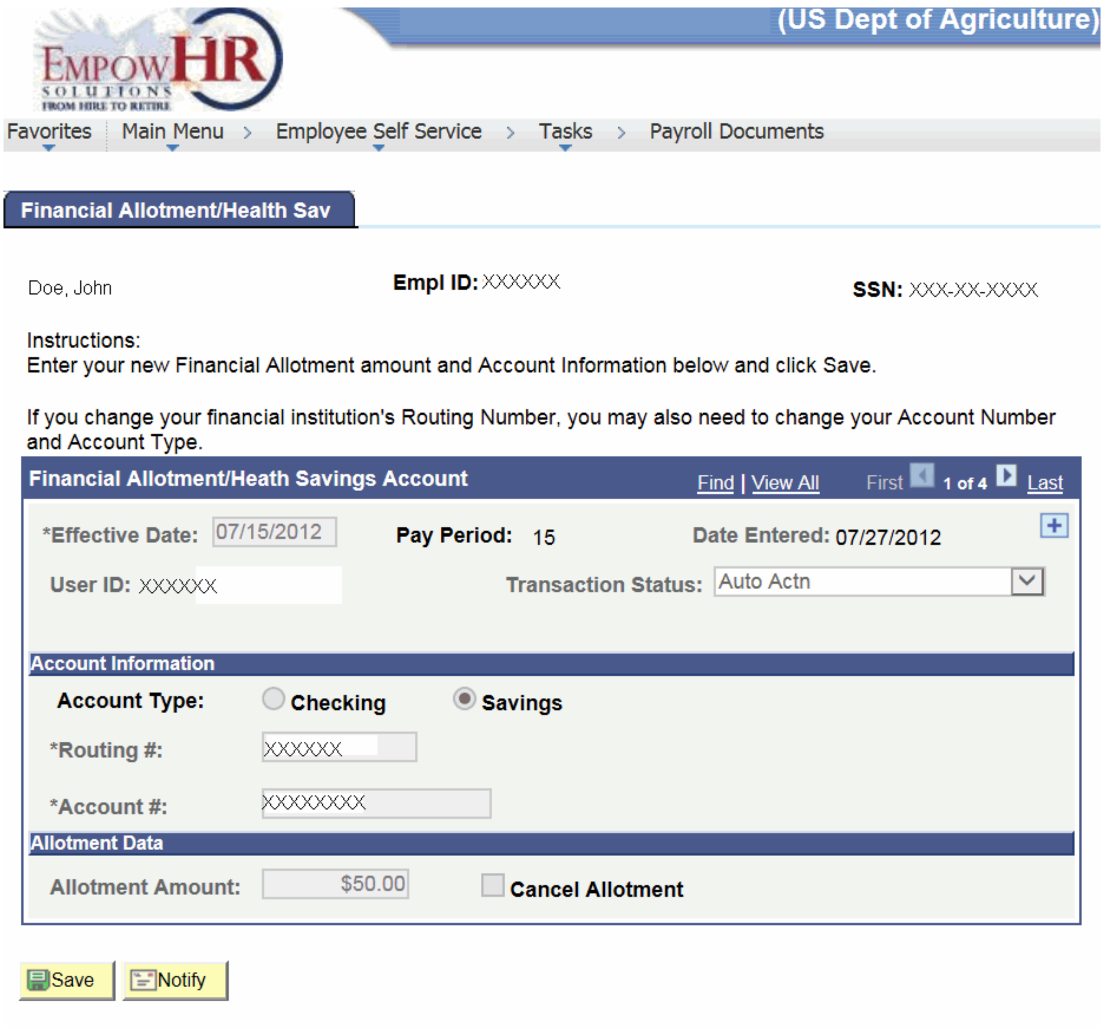


Figure 18: Financial Allotment/Health Sav Tab

5. Complete the fields as follows:

Field	Description/Instruction

Field	Description/Instruction
Empl ID	Populated when the employee signs on to ESS.
SSN	Populated when the employee signs on to ESS.
Financial Allotment/Health Savings Account	**Description/Instruction**
***Effective Date**	Required field. Populated with the beginning date of the current pay period. This field can be changed by clicking the search icon.
Pay Period	Populated when the employee signs on to ESS.
Date Entered	Populated when the employee signs on to ESS.
User ID	Populated when the employee signs on to ESS.
Transaction Status	Defaults to **`In Progress`** and reflects the status of the transaction. The transaction status will change when the transaction is saved, is in suspense, or resent to NFC.
Account Information	**Instruction**
Account Type	Select the applicable account type.
***Routing #**	Required field. Enter the routing number of the bank or select data by clicking on the search icon.
***Account #**	Required field. Enter the account number of the direct deposit.
Allotment Data	**Instruction**
Allotment Amount	Enter the amount of the financial allotment.
Cancel Allotment	Check this box if the allotment should be canceled.

6. Click **Save**.

Health Benefits

Any Federal Employees Health Benefits (FEHB) program change request entered during Open Season will be effective Pay Period 01. If you meet the criteria for a qualifying life event (QLE) and wish to have your FEHB change effective on a different date, please see your servicing personnel office. The major QLEs that permit enrollment or change in enrollment outside of open season are:

- Change in family status:
    - Marriage

    - Birth or adoption of a child
    - Acquisition of a foster child
    - Legal separation
    - Divorce
    - Death of a spouse or dependent
- Change in employment status:
    - Reemployed after a break in service of more than 3 days.
    - Return to pay status after your coverage terminated during LWOP status or because you were in LWOP status for more than 365 days.
    - Pay increases enough for premiums to be withheld.
    - Restored to a civilian position after serving in the uniformed services.
    - Change from a temporary appointment to an appointment that entitles you to a Government contribution.
    - Change to or from part-time career employment.
- Employee or a family member lose FEHB or other coverage:
    - Under another FEHB enrollment because the covering enrollment was terminated, canceled, or changed to self only.
    - Under another Federally-sponsored health benefits program.
    - Under Medicaid or similar State-sponsored program for the needy because your membership terminates in the employee organization sponsoring the FEHB plan.
    - Under a non-Federal health plan.

When one of these events occur, the employee may:

- Enroll
- Change enrollment from self only to self and family
- Change enrollment to self only
- Cancel enrollment

Note: A change to self only may be made only if the QLE causes the enrollee to be the last eligible family member under the FEHB enrollment. A cancelation may be made only if the enrollee can show that as a result of the QLE, he or she and all eligible family members now have other health insurance.

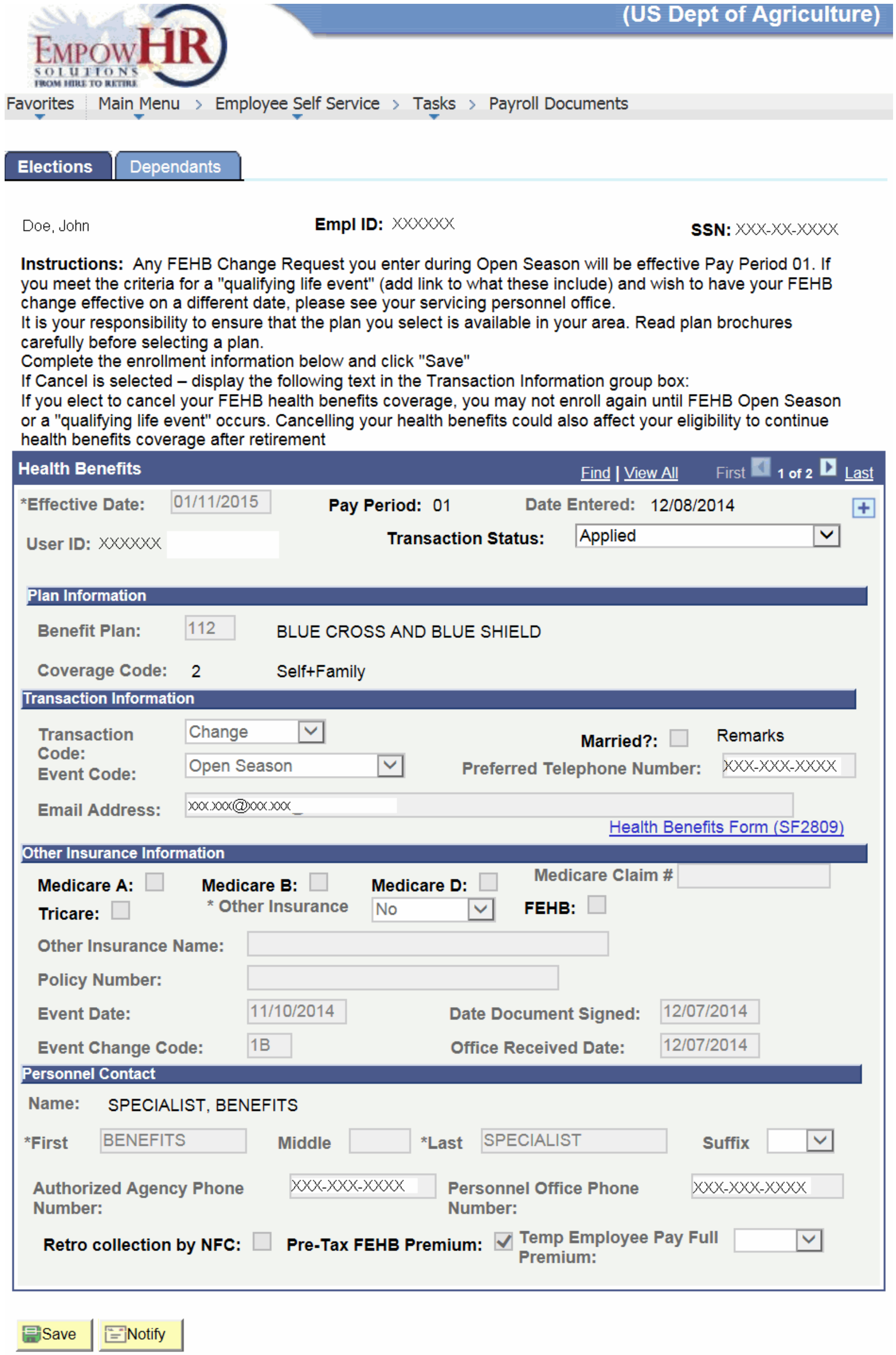
For more information see:

Entering/Changing/Canceling Health Benefits Data

To Add/Change/Cancel Health Benefits Data:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Payroll Documents*** component.

4. Select **Modify Health Benefits**. The Health Benefits page - Elections tab is displayed.



(US Dept of Agriculture)

Favorites | Main Menu > Employee Self Service > Tasks > Payroll Documents

Elections | Dependants

Doe, John   **Empl ID:** XXXXXX   **SSN:** XXX-XX-XXXX

Instructions: Any FEHB Change Request you enter during Open Season will be effective Pay Period 01. If you meet the criteria for a "qualifying life event" (add link to what these include) and wish to have your FEHB change effective on a different date, please see your servicing personnel office.
It is your responsibility to ensure that the plan you select is available in your area. Read plan brochures carefully before selecting a plan.
Complete the enrollment information below and click "Save"
If Cancel is selected – display the following text in the Transaction Information group box:
If you elect to cancel your FEHB health benefits coverage, you may not enroll again until FEHB Open Season or a "qualifying life event" occurs. Cancelling your health benefits could also affect your eligibility to continue health benefits coverage after retirement

Health Benefits   Find | View All   First 1 of 2 Last

*Effective Date: 01/11/2015   Pay Period: 01   Date Entered: 12/08/2014

User ID: XXXXXX   Transaction Status: Applied

Plan Information

Benefit Plan: 112   BLUE CROSS AND BLUE SHIELD

Coverage Code: 2   Self+Family

Transaction Information

Transaction Code: Change   Married?:   Remarks

Event Code: Open Season   Preferred Telephone Number: XXX-XXX-XXXX

Email Address: xxx.xxx@xxx.xxx

Health Benefits Form (SF2809)

Other Insurance Information

Medicare A: Medicare B: Medicare D: Medicare Claim #

Tricare: * Other Insurance: No   FEHB:

Other Insurance Name:

Policy Number:

Event Date: 11/10/2014   Date Document Signed: 12/07/2014

Event Change Code: 1B   Office Received Date: 12/07/2014

Personnel Contact

Name: SPECIALIST, BENEFITS

*First BENEFITS   Middle   *Last SPECIALIST   Suffix

Authorized Agency Phone Number: XXX-XXX-XXXX   Personnel Office Phone Number: XXX-XXX-XXXX

Retro collection by NFC: Pre-Tax FEHB Premium: ☑   Temp Employee Pay Full Premium:

Save   Notify

Figure 19: Health Benefits Page - Elections Tab

5. Complete the fields as follows:

Field	Description/Instruction
Empl ID	Populated when the employee signs on to ESS.
SSN	Populated when the employee signs on to ESS.
Health Benefits	**Description/Instruction**
***Effective Date**	Required field. Populated with the beginning date of the current pay period. This field can be changed by clicking the search icon.
Pay Period	Populated with the pay period that the document was entered.
Date Entered	Populated with the date that the document was entered.
User ID	Populated when the employee signs on to ESS.
Transaction Status	Populated with the current status of the transaction. When the transaction is saved, the status will change.
Plan Information	**Instruction**
Benefit Plan	Enter the health benefit plan.
Coverage Code	Enter the applicable coverage code for the health benefit plan entered. The literal is displayed to the right of the field.
Transaction Information	**Instruction**
Transaction Code	Select the application action from the drop-down list. The valid values are **Add**, **Change**, and **Delete**.
Married?	Check this box if the applicant is married.
Event Code	Select the applicable event from the drop-down list.
Preferred Telephone Number	Enter the phone number of the applicant.
Email Address	Enter the email address of the applicant.
Other Insurance Information	**Instruction**
Medicare A	Check this box if applicable.
Medicare B	Check this box if applicable.
Medicare D	Check this box if applicable.
Medicare Claim #	Enter the Medicare claim number if applicable.

Field	Description/Instruction
Tricare	Check this box if applicable.
***Other Insurance**	Required field. Select whether or not the applicant has other insurance from the drop-down list.
FEHB	Check this box if the applicant already has FEHB coverage.
Other Insurance Name	Enter the private insurance name if the applicant has additional insurance.
Policy Number	Enter the policy number if the applicant has additional insurance.
Event Date	Enter the event date or select a date from the calendar icon.
Date Document Signed	Enter the date the insurance document was signed or select a date from the calendar icon.
Event Change Code	Enter the event change code or select data by clicking the search icon.
Office Received Date	Enter the date the office received the document or select a date from the calendar icon.
Personnel Contact Name	**Description/Instruction**
***First**	Required field. Enter the first name of the personnel contact.
Middle	Enter the middle name of the personnel contact, if applicable.
***Last**	Required field. Enter the last name of the personnel contact.
Suffix	Select the applicable suffix, if applicable.
Authorized Agency Phone Number	Enter the phone number of the personnel contact's Agency.
Personnel Office Phone Number	Enter the phone number of the personnel office for the personnel contact.
Retro collection by NFC	Check this box if applicable.
Pre-Tax FEHB Premium	Populated with a check. Uncheck if the pre-tax premium is no.
Temp Employee Pay Full Premium	Defaults to **No**. Change by selecting data from the drop-down list.

6. Click ***Health Benefits Form (SF2809)*** link to complete the Health Benefits form for submission.

7. Click **Save**.

8. Click the ***Dependents*** link at the bottom of the page. The Health Benefits page - Dependents tab is displayed.

OR

Select the ***Dependents*** tab at the top of the page. The Health Benefits page - Dependents tab is displayed.

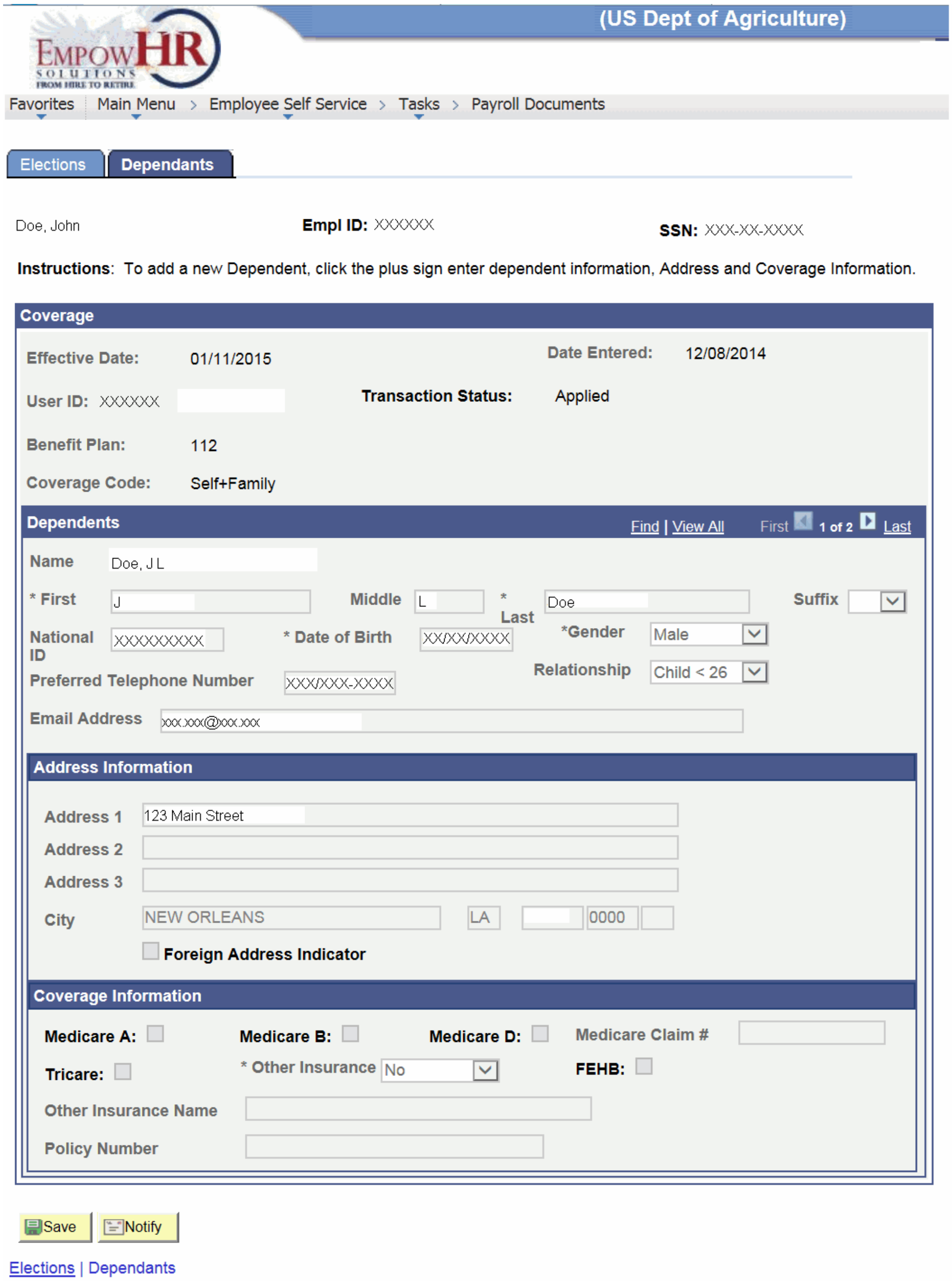


Figure 20: Health Benefits Page - Dependants Tab

9. Complete the fields as follows:

Field	Description/Instruction
Empl Id	Populated when the employee signs on to ESS.
SSN	Populated when the employee signs on to ESS.
Coverage	**Description/Instruction**
Effective Date	Populated with the beginning date of the current pay period. This field can be changed by clicking the search icon.
Date Entered	Populated with the date that the document was entered.
User ID	Populated when the employee signs on to ESS.
Transaction Status	Populated with the current status of the transaction. When the transaction is saved, the status will change.
Benefit Plan	Populated from the Elections tab.
Coverage Code	Populated from the Elections tab.
Dependents **Name**	**Instruction**
***First**	Required field. Enter the first name of the personnel contact.
Middle	Enter the middle name of the personnel contact, if applicable.
***Last**	Required field. Enter the last name of the personnel contact.
Suffix	Select the suffix, if applicable, from the drop-down list.
National ID	Enter the SSN of the dependent.
***Date of Birth**	Required field. Enter the birth date of the dependent or select a date from the calendar icon.
***Gender**	Required field. Select the gender of the dependent from the drop-down list.
Preferred Telephone Number	Enter the preferred telephone number.
Relationship	Select the relationship between the applicant and the dependent from the drop-down list.
Email Address	Enter the applicable email address.
Address Information	**Instruction**
Address 1	Enter the first line of the dependent's address.

Field	Description/Instruction
Address 2	Enter the second line of the dependent's address, if applicable.
Address 3	Enter the third line of the dependent's address, if applicable.
City	Enter the city, State, and ZIP Code of the address in each of the appropriate fields.
Foreign Address Indicator	Check this box if the address is in a foreign country.
Coverage Information	**Instruction**
Medicare A	Check this box, if applicable.
Medicare B	Check this box, if applicable.
Medicare D	Check this box, if applicable.
Medicare Claim #	Enter the Medicare claim number, if applicable.
Tricare	Check this box, if applicable.
***Other Insurance**	Required field. Select whether or not the applicant has other insurance from the drop-down list.
FEHB	Check this box if the applicant already has FEHB coverage.
Other Insurance Name	Enter the name of the other insurance if the applicant has additional insurance.
Policy Number	Enter the policy number if the applicant has additional insurance.

10. Click the **+** to add another dependent. If more than two, click the **+** for each additional dependent.

11. Click **Save**.

State Tax

For processing purposes, the tax year usually begins in Pay Period 25 and ends in Pay Period 24. All taxes withheld for those inclusive pay periods are reported on the IRS Form W-2, Wage and Tax Statement.

A new tax certificate may be processed at any time to change an employee's tax information. If the employee's duty station or residence changes and the new local tax location has an agreement with Treasury for mandatory withholding, a new tax certificate should be processed. All previously processed exemptions, additional withholdings, etc., will be removed and must be reprocessed, if applicable. If a new tax certificate is not processed, the Payroll/Personnel System (PPS) will begin withholdings at the highest taxable rate if the duty station has a mandatory tax withholding agreement

You may be exempt from withholding of State tax on the basis of limited earnings or other reasons determined by the State. If exemption is allowed by the State, type Only (**ONL**) in the Total Number of Allowances field, to indicate the employee is exempt from withholding.

Some States do not provide State withholding exemption certificates for establishing an exemption status; others do not require the processing of State tax withholding data since the income tax formulas are based on a percentage of Federal income tax, Federal exemption status, or a percentage of annual wages. If the State tax withholding is based on the Federal withholding and a Form W-4 is not processed, Federal and State Income Taxes will be automatically withheld at the rate of single with zero exemption until a Form W-4 is entered for processing.

Unless otherwise indicated, State tax deductions for lump sum payments and cash awards are withheld based on the employee's State tax exemptions recorded in the database.

For more information see:

Dual State Tax Voluntary Withholding

Dual State tax withholding allows employees to voluntarily elect to pay State tax in both their duty station and residence States. If State income tax is currently being withheld based on the duty station and a State tax form is entered to begin withholding for the residence State, the document will appear in suspense with an informational message indicating the document entered will result in dual State tax deductions. To release the document, type **C** in the Status Code field.

The Form AD-304, Request and Authorization for Allotments of Compensation for State Income Tax Purposes, serves as a certification that the employee is authorizing voluntary withholding from his/her pay and must accompany the appropriate State withholding exemption certificate. The Form AD-304 can also be used to record the voluntary State tax withholding data in cases where the State does not provide a form for the declaration of withholding.

If the Form AD-304 is used to record voluntary State tax data in lieu of a State tax certificate, the State Tax Withholding State Code, the Total Number of Allowances, and the Additional Amount (if applicable) must be indicated on the form when signed by the employee.

Cancelation of Voluntary Withholding

Voluntary State tax withholding will terminate if:

- The duty station State changes (the certificate of non-residence is now void).
- The State revokes its tax withholding law.
- An exemption-from-withholding certificate is processed (**ONL** in the Total Number of Allowances field).
- A cancelation of voluntary withholding is processed (**CAN** in the Total Number of Allowances field).

Certificate of Non-Residence for State Tax

States with reciprocal agreements have agreed that if taxes are withheld for the residence State, taxes will not be withheld for the duty station State. A certificate of non-residence allows an employee to declare non-residency for the duty station State to have taxes withheld for the residence State.

State laws and regulations should be checked to determine if reciprocal agreements are in place before processing a certificate of non-residence for an employee. In most cases, the employee must reside in one of several designated States to be exempt from the mandatory withholding provisions of their duty station State.

If your duty station changes, the certificate of non-residence in effect at that time will become void, and a new certificate is required for the new duty station State (if applicable).

Each certificate of non-residence is to be completed following the instructions on the individual form. Enter the duty station State tax document to waive liability before entering the State tax document for the residence State. Type **WAV** (waiver) in the Total Number of Allowances Claimed field.

Voluntary Withholding

Several taxing entities that do not have agreements with the Secretary of the Treasury have been established in the database for voluntary tax withholding. Tax data must be processed for these entities for taxes to be withheld. Voluntary withholding is based on residence. An employee may voluntarily elect to pay tax based on residence if:

- The residence city, county, or State is established in the Table Management System (TMGT).
- The mandatory duty station tax is waived (if allowed).
- The residence tax locality on the tax form agrees with the residence tax locality of the duty station.

Additional Withholding

You may authorize an amount to be withheld from your salary each pay period in addition to the amount automatically withheld in accordance with the income tax formula. Most exemption certificates allow for additional withholding. This dollar amount is entered in the Additional Withholding Amount field of the applicable income tax certificate page.

This section shows the process of establishing or changing an employee's State income tax withholding code or an additional withholding amount and establishing or canceling a certificate of non-residence and claiming total exemptions from withholding, if permitted by the State.

Before beginning, the following information is needed: (refer to the State tax withholding certificated completed by the employee.)

- State tax withholding code
- Total number of allowances
- Additional withholding amount (for California, Illinois, Michigan, Virginia, and Puerto Rico only)
- Additional exemptions claimed (for Puerto Rico only)
- Personal exemptions claimed
- Public or private employee

Entering/Changing/Canceling State Tax Data

To Add/Change/Cancel State Tax Data:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Payroll Documents*** component.

4. Select ***Modify State Tax***. The State Tax tab is displayed.

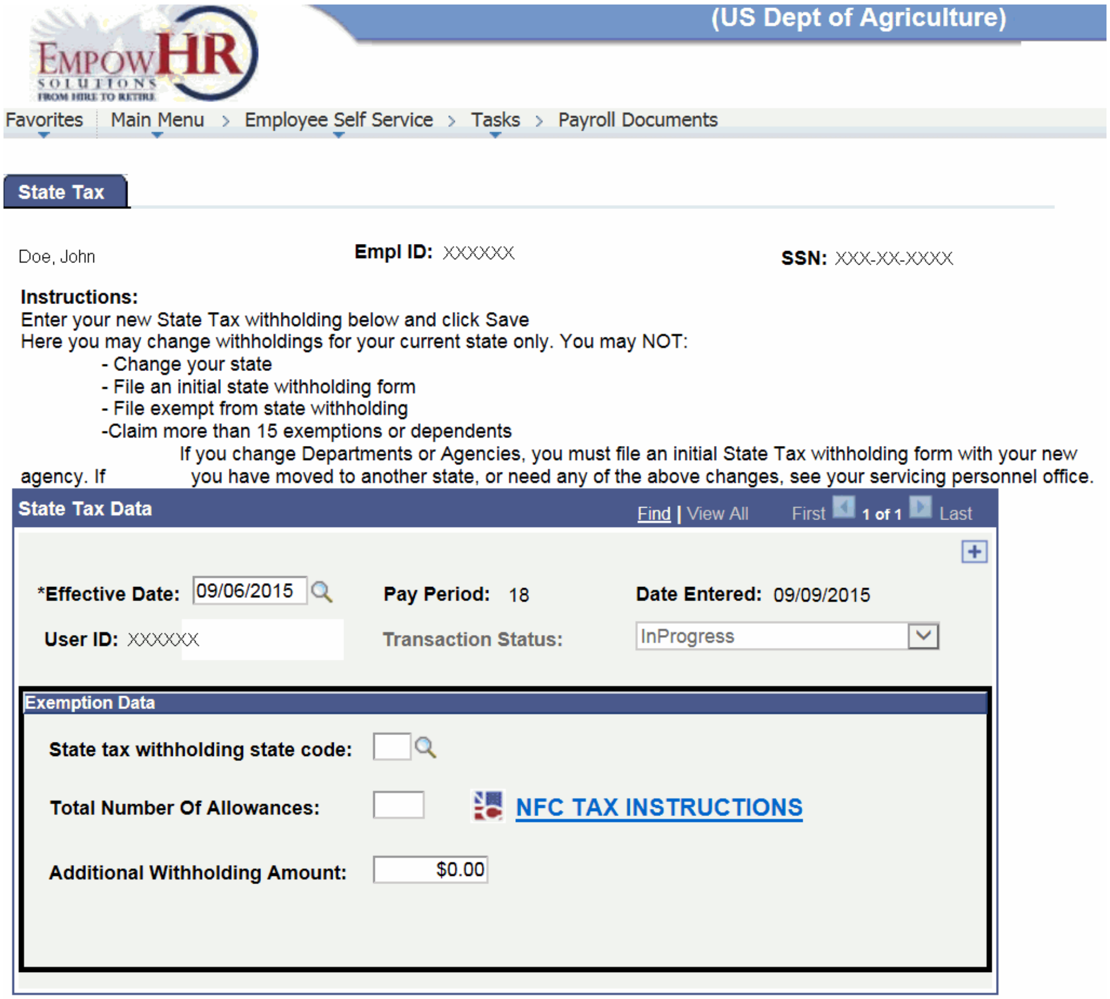


Figure 21: State Tax Tab

5. Complete the fields as follows:

Field	Description/Instruction
Empl ID	Populated when the employee signs on to ESS.
SSN	Populated when the employee signs on to ESS.
State Tax Data	**Description/Instruction**
***Effective Date**	Required field. Populated with the beginning date of the current pay period. Change the date, if applicable.
Pay Period	Populated with the coordinating pay period of the Effective Date.
Date Entered	Populated with the date entered.
User ID	Populated when the employee signs on to ESS.

Field	Description/Instruction
Transaction Status	Defaults to **In Progress** and reflects the status of the transaction. The transaction status will change when the transaction is saved, is in suspense, or resent to NFC.
Exemption Data	**Instruction**
State tax withholding state code	Enter the State tax withholding code or select data by clicking the search icon.
Total Number Of Allowances	Enter the applicable number.
Additional Withholding Amount	Enter the additional amount to be withheld, if applicable.

6. Click **Save**.

Thrift Savings Plan

The TSP transaction allows you to specify a percentage of pay (up to 99 percent) or whole dollar amount to contribute to your TSP each pay period. Your total contributions for the year may not exceed the IRS limit. When changing your TSP contribution amounts, please enter either a percentage or whole dollar amount. Do no enter both.

Federal Employees Retirement System (FERS) employees should refer to the TSP Fact Sheet, Annual Limit on Elective Deferrals, dated November 2, 2005, available on *www.tsp.gov* to ensure your contribution will receive the maximum Agency matching.

Before beginning, the following information is needed: (Refer to Form TSP-1, Election Form - Thrift Savings Plan.)

- The type of action (enrolling, changing, stopping contributions).
- The percent of contribution or the amount of contribution.
- The time of the action (whether action is being processed during an open season).

For more information see:

Entering/Changing/Canceling Thrift Savings Plan/Roth Data

To Add/Change/Cancel Thrift Savings Plan/Roth Data:

1. Select the ***Employee Self Service*** menu group.

2. Select the ***Tasks*** menu.

3. Select the ***Payroll Documents*** component.

4. Select ***Modify TSP/TSP Roth***. The TSP/TSP Roth tab is displayed.

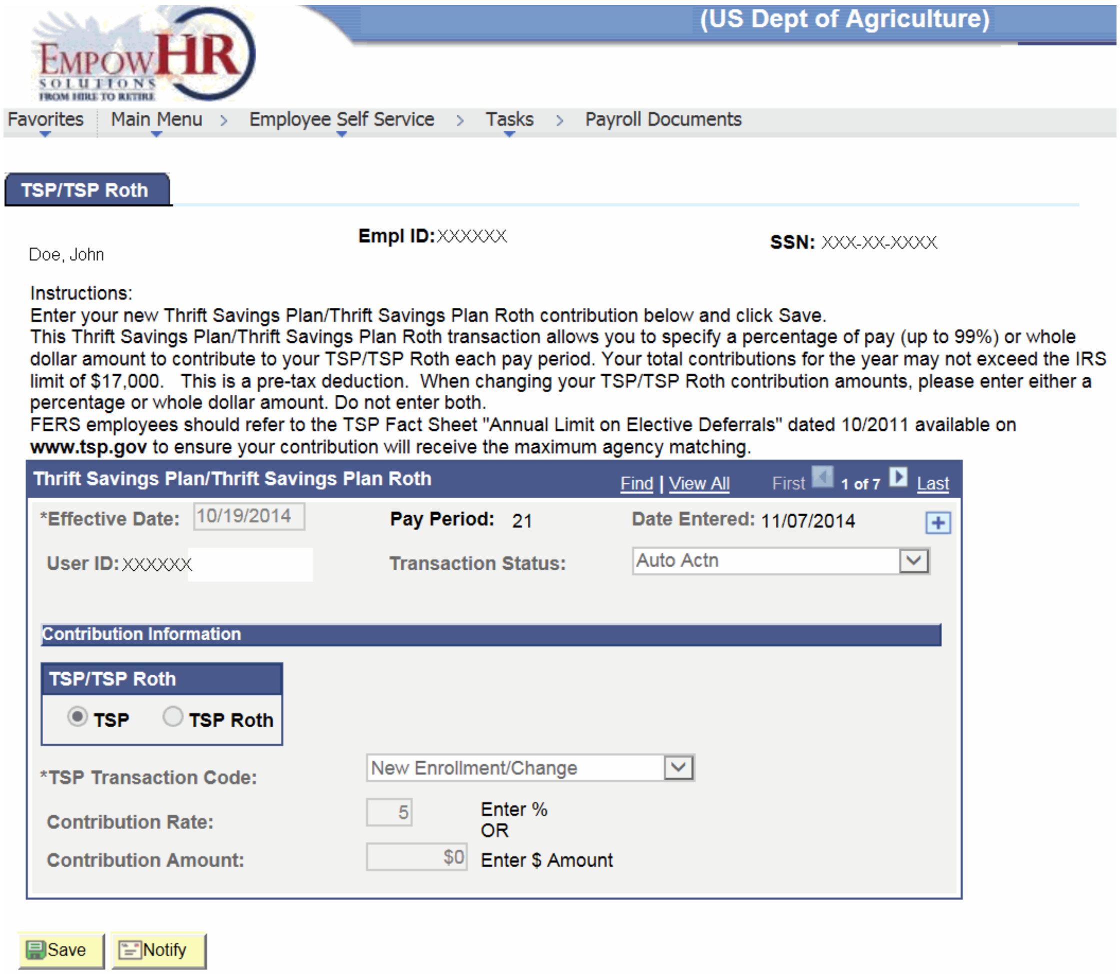


Figure 22: TSP/TSP Roth Tab

5. Complete the fields as follows:

Field	**Description/Instruction**
Empl ID	Populated when the employee signs on to ESS.
SSN	Populated when the employee signs on to ESS.
Thrift Savings Plan/Thrift Savings Plan Roth	**Description/Instruction**
***Effective Date**	Required field. Populated with the beginning date of the current pay period. Change the date, if applicable.

Field	Description/Instruction
Pay Period	Populated with the coordinating pay period based upon the Effective Date.
Date Entered	Populated with the date entered.
User ID	Populated when the employee signs on to ESS.
Transaction Status	Defaults to `In Progress` and reflects the status of the transaction. The transaction status will change when the transaction is saved, is in suspense, or resent to NFC.
Contribution Information	**Instruction**
TSP/TSP Roth	Select the applicable radio button to designate whether the contribution is `TSP` or `TSP Roth`.
***TSP Transaction Code**	Required field. Select the applicable code from the drop-down list.
Contribution Rate **OR** **Contribution Amount**	Enter the contribution percent, or enter the contribution amount ($XX.XX). If you enter a percentage, you cannot enter an amount. If you enter an amount, you cannot enter a percentage.

6. Click **Save**.

Thrift Savings Plan Catch-Up Contributions

Public Law 107-304 permits eligible TSP participants age 50 or older to make tax-deferred "catch-up" contributions from basic pay to their TSP accounts. The catch-up contributions are a supplement to the participant’s regular TSP contributions and do not count against either the statutory contribution percentage limitations or the IRS deferral limit.

You must meet the following criteria in order to make catch-up contributions:

- In pay status.
- At least 50 years or older in the year that the catch-up contributions are made.
- Not be in the 6-month non-contribution period following a financial hardship in-service withdrawal.
- Contribute the maximum amount allowed according to TSP/IRS regulations.

There are no matching Government contributions when making catch-up contributions. Allocations for the catch-up contributions will be made in accordance with the employee’s current allocations.

Before beginning, the following information is needed: (Refer to Form TSP-1-C, Catch-up Contribution Election - Thrift Savings Plan.)

- Type of action (enrolling, changing, stopping contributions)
- Amount of contribution

For more information see:

Entering/Changing/Canceling Thrift Savings Plan Catch-Up Data

To Add/Change/Cancel Thrift Savings Plan Catch-up Data:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Payroll Documents*** component.

4. Select ***Modify TSP Catch-Up***. The TSP Catch-Up/TSP Roth Catch-Up tab is displayed.

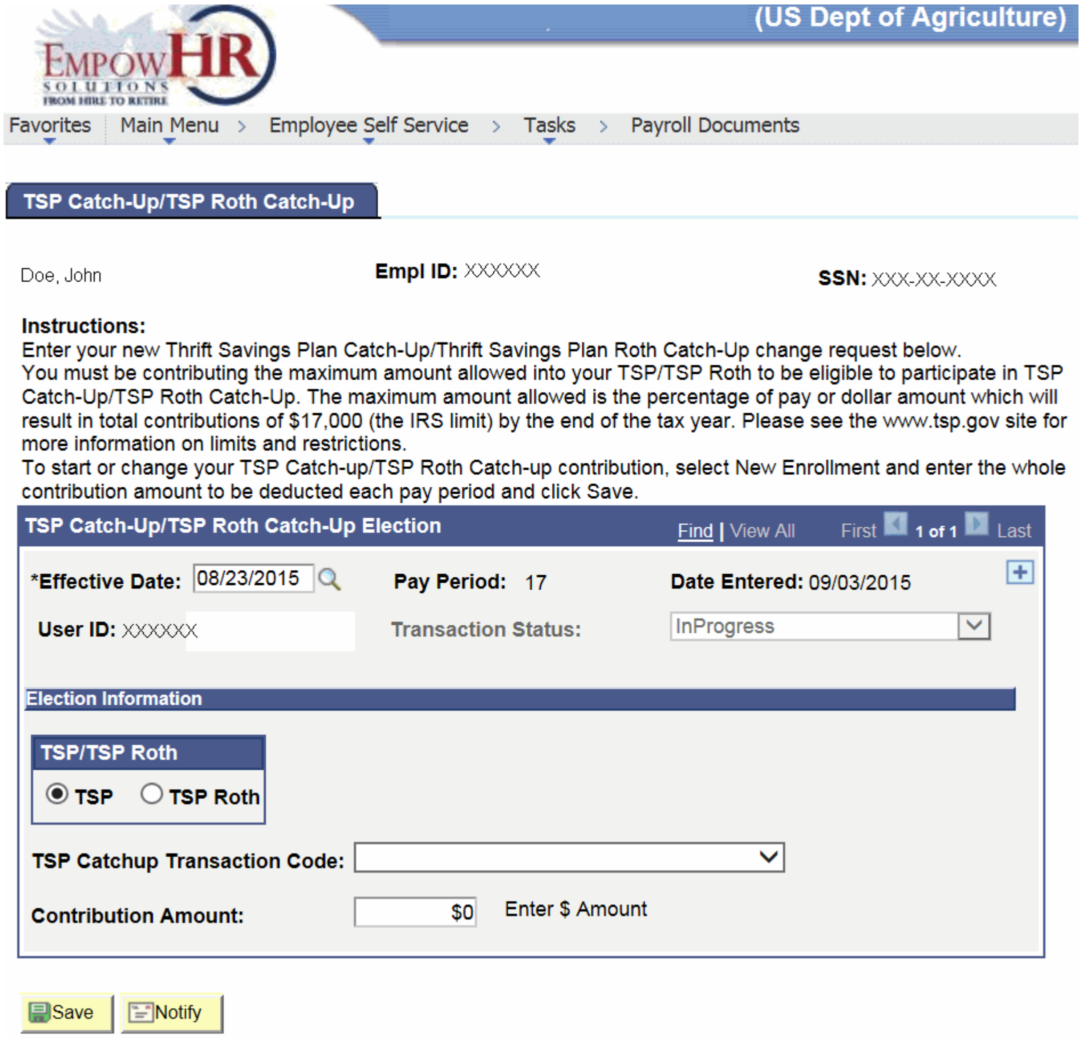


Figure 23: TSP Catch-up/TSP Roth Catch-up Tab

5. Complete the fields as follows:

Field	Description/Instruction
Empl ID	Populated when the employee signs on to ESS.
SSN	Populated when the employee signs on to ESS.
TSP Catch-Up/TSP Roth Catch-Up Election	**Description/Instruction**
***Effective Date**	Required field. Populated with the beginning date of the current pay period. Change the date, if applicable.
Pay Period	Populated with the coordinating pay period based upon the effective date entered.

Field	Description/Instruction
Date Entered	Populated with the date entered.
User ID	Populated when the employee signs on to ESS.
Transaction Status	Defaults to **In Progress** and reflects the status of the transaction. The transaction status will change when the transaction is saved, is in suspense, or resent to NFC.
Election Information	**Instruction**
TSP/TSP Roth	Select the applicable radio button to designate whether the catch-up contribution is **TSP** or **TSP Roth**.
TSP Catchup Transaction Code	Select the applicable code from the drop-down list.
Contribution Amount	Enter the contribution amount ($XX.XX).

6. Click **Save**.

Awards

This process allows employees view and update an award.

For more information see:

Viewing and Updating Award Data

To View and Update an Award:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.

3. Select the ***Awards*** component. The Awards page - Specify EMPLID or search by Sub-Agency, State and Last Name tab is displayed.

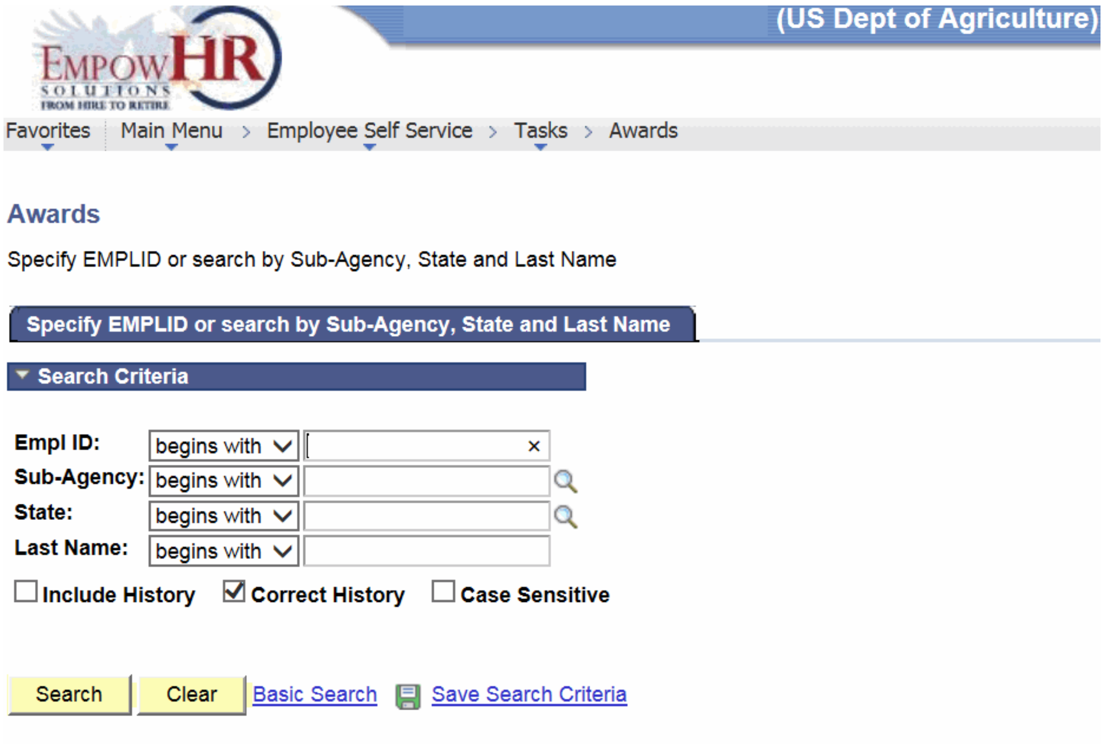


Figure 24: Awards Page - Specify EMPLID or search by Sub-Agency, State and Last Name Tab

4. Complete the fields as follows:

Field	Description/Instruction
EmplID	Enter the EmplID.
Sub-Agency	Enter the sub-Agency.
State	Enter the State.
Last Name	Enter the last name.
Include History	Click this field if the search criteria should include historical data.
Correct History	Click this field if the search criteria is being used to correct history.
Case Sensitive	Click this field if the search criteria is case sensitive.

5. Click **Search**. The Award Request for page is displayed.

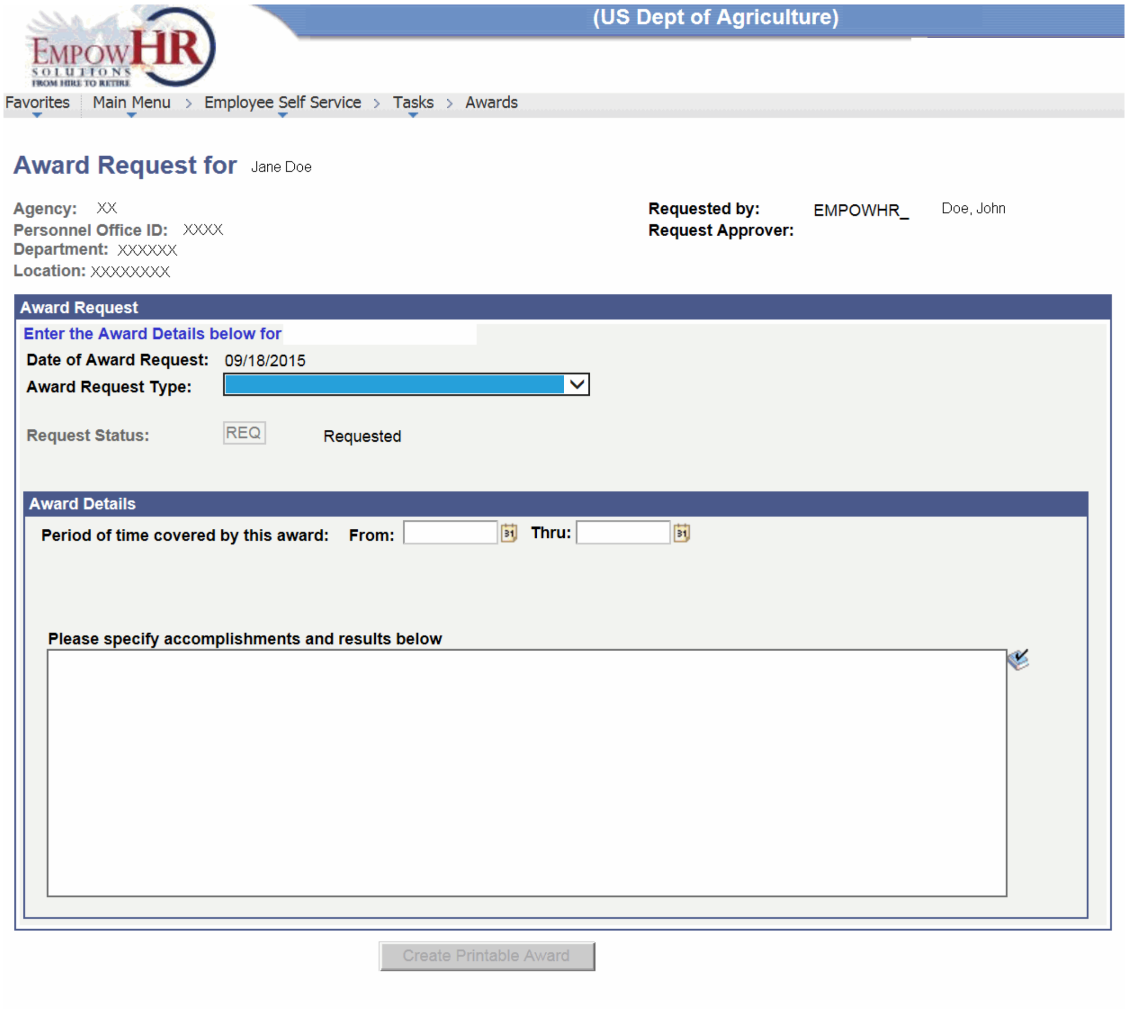


Figure 25: Award Request for Page

6. Complete the fields as follows:

Field	Description/Instruction
Agency	Populated with the Agency of the employee.
Requested by	Populated with the user ID and name.
Personnel Office ID	Populated with the POI of the employee.
Request Approver	Populated with the approver of the request.
Department	Populated with the Department of the employee/POI.
Location	Populated with the location number and State.
Award Request	**Description/Instruction**

Field	Description/Instruction
Enter the Award Details below for	Populated with the name of the employee.
Date of Award Request	Enter the current date of the award request or select a date from the calendar icon.
Award Request Type	Select the award type from the drop-down list.
Request Status	Populated with the status of the award. The code is displayed in the field, and the literal is displayed to the right of the field.
Award Details	**Instruction**
Period of time covered by this award/From	Enter the date the award period started or select a date from the calendar icon.
Period of time covered by this award/Thru	Enter the date the award period ended or select a date from the calendar icon.
Please specify accomplishments and results below	Enter the applicable information about the award.

7. Click **Create Printable Award**. The award is saved.

Contact Information

This section contains instructions for employees to update their contact information.

For more information see:

Email Address

This section explains how to enter an email address.

To enter an email address:

1. Select the ***Employee Self Service*** menu group.

2. Select the ***Tasks*** menu.

3. Select the ***Contact Information*** component. The Contact Information page is displayed.

Figure 26: Contact Information Page

4. Click **Email Address**. The Email Addresses page is displayed.

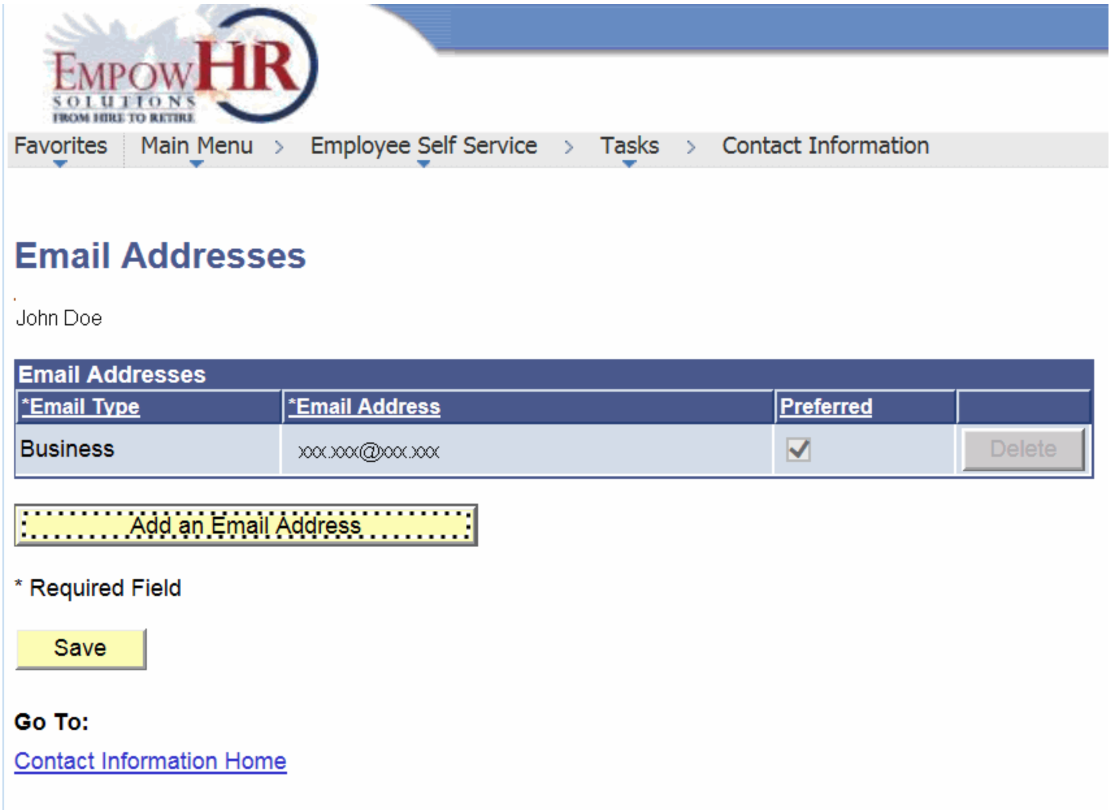


Figure 27: Email Addresses Page

5. Click **Add an Email Address**.

6. Complete the fields as follows:

Field	Description/Instruction
***Email Type**	Required field. Enter the type of email address or select data from the drop-down list.
***Email Address**	Required field. Enter the email address.
Preferred	Check this box if this is preferred email address.

Note: If an email address is already established, click **Delete** to delete the established email address.

7. Click **Save**.

8. Click **OK**.

9. Click the ***Contact Information Home*** link. The Contact Information page is displayed.

Emergency Contacts

This section explains how to enter an emergency contact.

To enter an emergency contact:

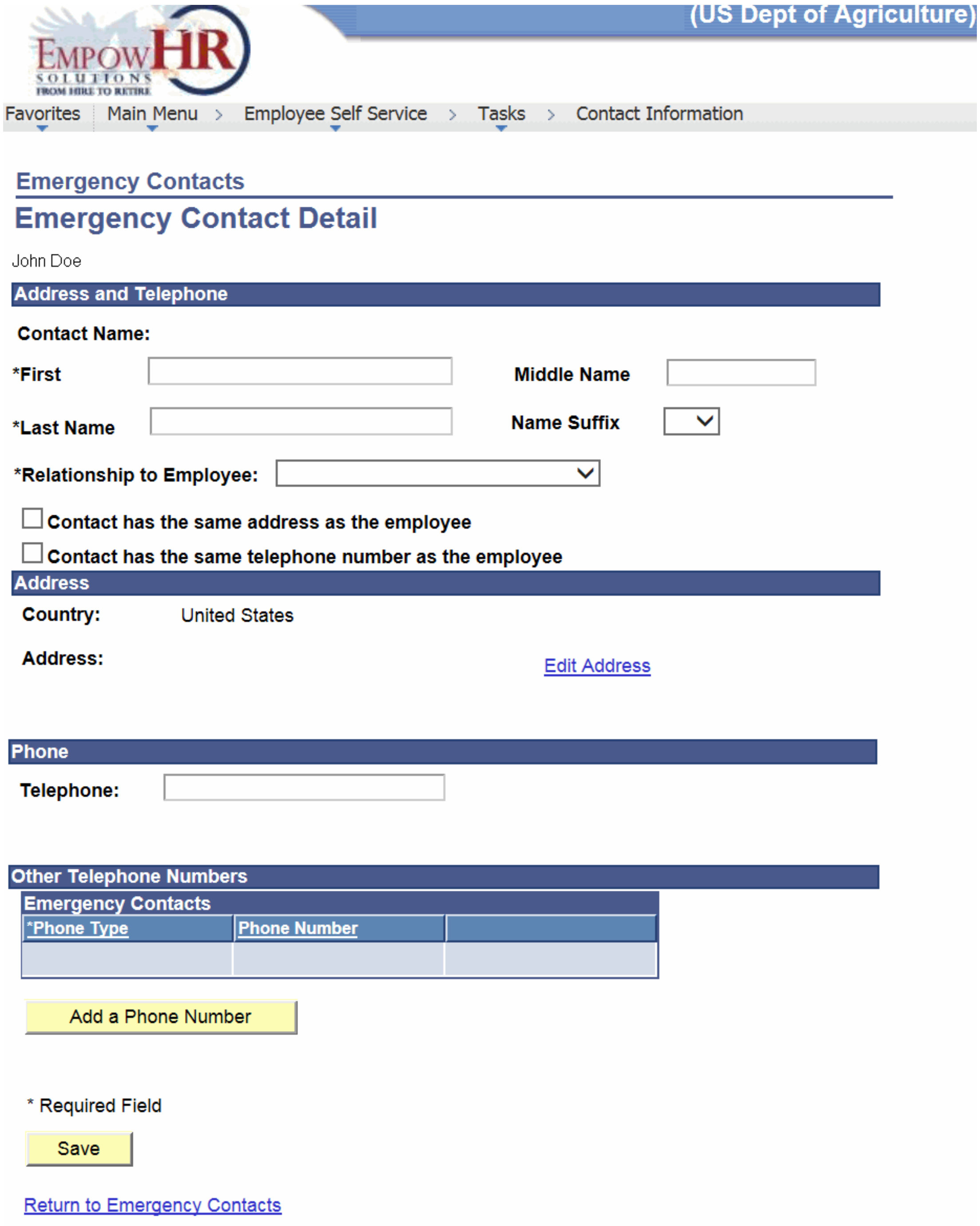
1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Contact Information*** component. The Contact Information page is displayed.

Figure 28: Contact Information Page

4. Click **Emergency Contacts**. The Emergency Contacts page is displayed.

Figure 29: Emergency Contacts Page

5. Click **Add an Emergency Contact**. The Emergency Contacts - Emergency Contact Detail page is displayed.



6. Complete the fields as follows:

Field	Description/Instruction
Address and Telephone	**Instruction**

Field	Description/Instruction
Contact Name	
***First**	Required field. Enter the first name of the emergency contact.
Middle Name	Enter the middle name of the emergency contact, if applicable.
***Last Name**	Required field. Enter the last name of the emergency contact.
Name Suffix	Select the suffix for the name, if applicable, or from the drop-down list.
***Relationship to Employee**	Required field. Select the relationship the contact is to the employee from the drop-down list.
Contact has the same address as the employee	Check this box if the contact has the same address as the employee.
Contact has the same telephone number as the employee	Check this box if the contact has the same phone number as the employee.
Address	**Description/Instruction**
Country	Populated with the employee's country.
Address	Not used.
Phone	**Instruction**
Telephone	Enter the applicable telephone number of the contact.
Other Telephone Numbers **Emergency Contacts**	**Instruction**
***Phone Type**	Required field. Select the applicable telephone number type.
Phone Number	Enter an additional telephone number, if applicable.

7. Click **Save**.

8. Click **OK**.

9. Click the ***Contact Information Home*** link. The Contact Information page is displayed.

Home Address

This section explains how to enter a Home Address Contact.

To enter a Home Address:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Contact Information*** component. The Contact Information page is displayed.

Figure 30: Contact Information Page

4. Click **Home Address**. The Home Address page is displayed.

Figure 31: Home Address Page

5. Click **Add New Address**. The Your Home Address - Home Address Detail page is displayed.

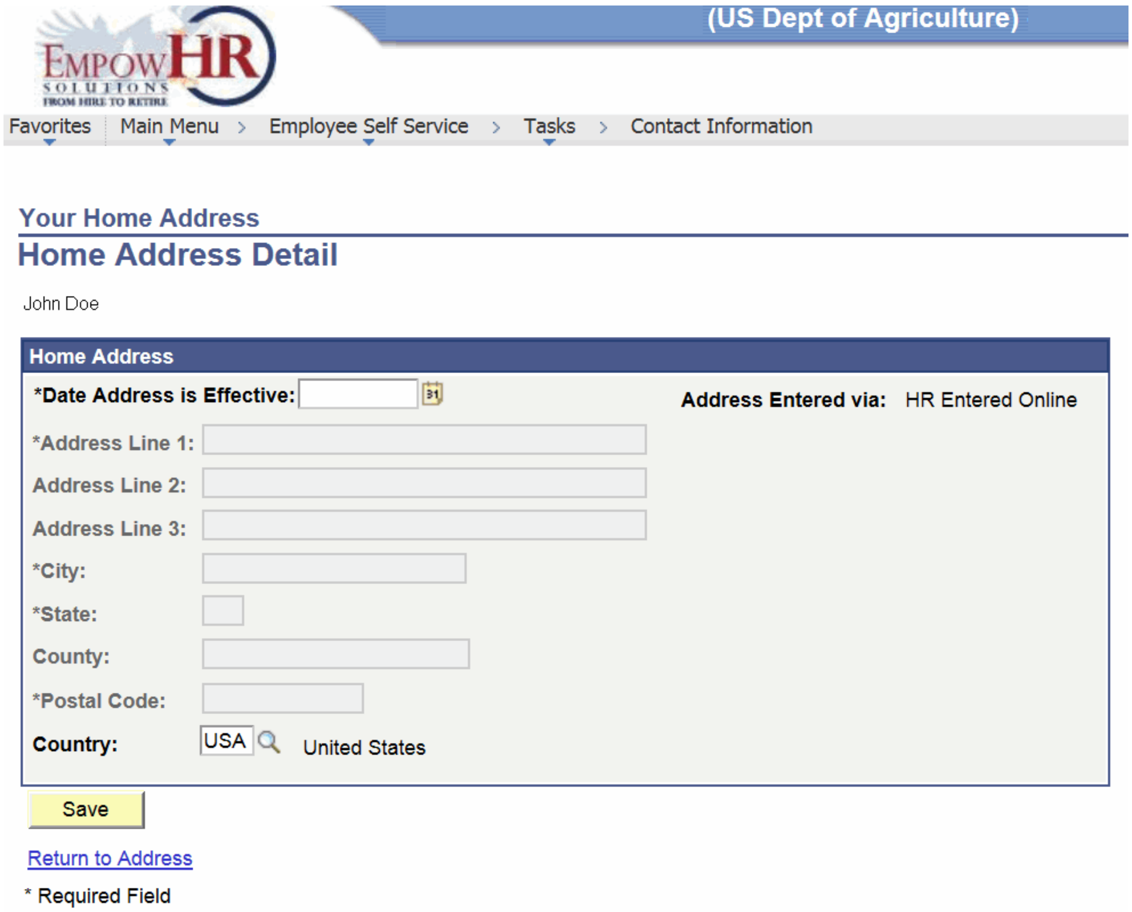


Figure 32: Your Home Address - Home Address Detail Page

6. Complete the fields as follows:

Field	Description/Instruction
Home Address	**Description/Instruction**
***Date Address is Effective**	Required field. Enter the date the address is effective or select a date from the calendar icon.
Address Entered via	Populated with the method used to enter the employee's address (i.e., EmpowHR).
***Address Line 1**	Required field. Enter the home address.
Address Line 2	Enter the second line of the home address, if applicable.
Address Line 3	Enter the third line of the home address, if applicable.
***City**	Required field. Enter the city of the home address.

Field	Description/Instruction
***State**	Required field. Enter the State of the home address.
County	Enter the county of the home address.
***Postal Code**	Required field. Enter the ZIP Code of the city.
Country	Defaults to **USA**. Change by selecting data from the search icon.

7. Click **Save**.
8. Click **OK**.
9. Click the ***Contact Information Home*** link. The Contact Information page is displayed.

Phone Numbers

This section explains how to enter a Phone Number.

To enter a phone number:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.

3. Select the ***Contact Information*** component. The Contact Information page is displayed.

Figure 33: Contact Information Page

4. Click **Phone Numbers**. The Phone Numbers page is displayed.

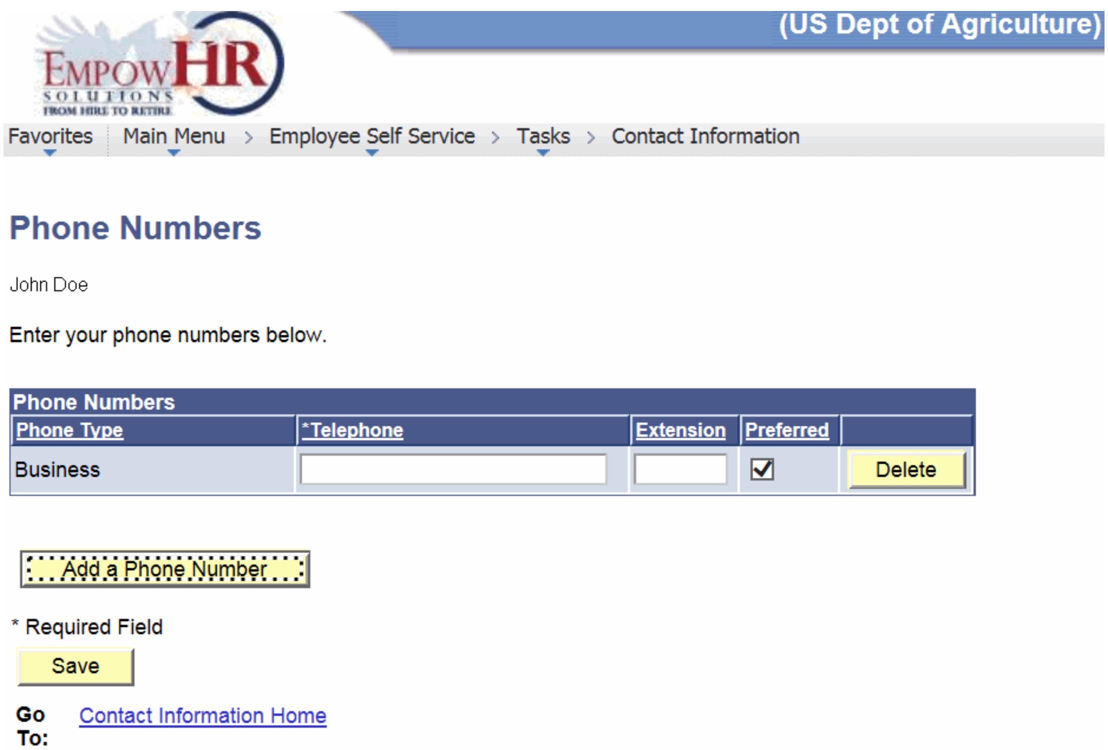


Figure 34: Phone Numbers Page

5. Click **Add a Phone Number**.

6. Complete the fields on the Phone Numbers page as follows:

Field	Description/Instruction
Phone Numbers	Select the type of phone number from the drop-down list.
Phone Type	**Instruction**
***Telephone**	Required field. Enter the telephone number.
Extension	Enter the extension, if applicable.
Preferred	Check this box if this is the preferred telephone number for the contact.

7. Click **Save**.

8. Click **OK**.

9. Click the ***Contact Information Home*** link. The Contact Information page is displayed.

Personal Information Summary

Addresses

To view/update your address information:

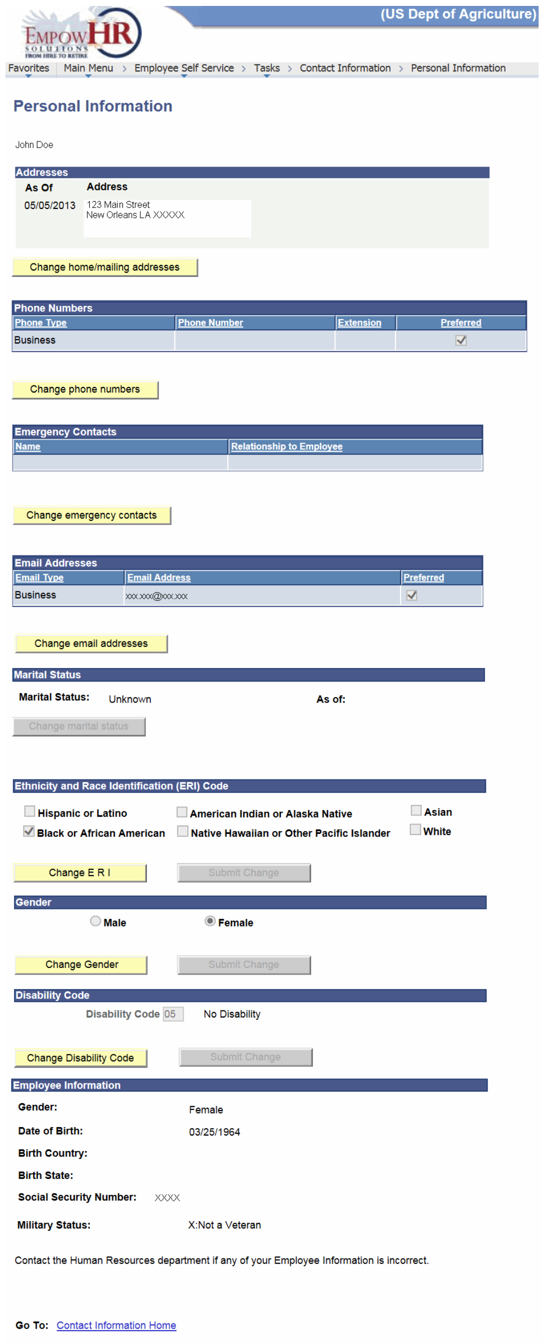
1. Select the ***Employee Self Service*** menu group.

2. Select the ***Tasks*** menu.

3. Select the ***Contact Information*** component. The Contact Information page is displayed.

Figure 35: Contact Information Page

4. Click **Personal Information Summary**. The Personal Information page is displayed.



5. Verify the information on the page.

6. Click the applicable button to update/modify the information, if applicable.

Note: The applicable page will be displayed to update/modify applicable personal information.

7. Complete the fields listed below to update/modify each section of the Personal Information page.

Field	Description/Instruction
Addresses	**Description**
As Of	Populated with the date that the address was entered for the employee.
Address	Populated with the employee's address.
Phone Numbers	**Description/Instruction**
Phone Type	Populated with the type of phone number.
Phone Number	Populated with the telephone number.
Extension	Populated with the extension, if applicable.
Preferred	Check this box, if this is the preferred telephone number for the contact.
Emergency Contacts	**Description**
Name	Populated with the name of the emergency contact.
Relationship to Employee	Populated with the relationship the contact is to the employee.
Email Addresses	**Description/Instruction**
Email Type	Populated with the type of email address.
Email Address	Populated with the email address.
Preferred	Check this box, if this is preferred email address.
Marital Status	This option is not used.
Ethnicity and Race Identification (ERI) Code	**Description/Instruction**
Hispanic or Latino	Check this box to identify yourself as Hispanic or Latino.
American Indian or Alaska Native	Check this box to identify yourself as an American Indian or Alaskan Native.
Asian	Check this box to identify yourself as Asian.
Black or African American	Check this box to identify yourself as black or African American.
Native Hawaiian or Other Pacific Islander	Check this box to identify yourself as a native Hawaiian or other Pacific Islander.
White	Check this box to identify yourself as white.

Field	Description/Instruction
Gender	**Instruction**
Male	Select this radio button to identify yourself as male.
Female	Select this radio button to identify yourself as female.
Disability Code	**Description**
Disability Code	Populated with the applicable code.
Employee Information	This option is read only and for HR use only.

8. If changes have been made, click **Submit Change**.

Performance

The ESS ***Performance*** option allows the employee to view and edit performance plan documents. The employee can view the performance plan start and end dates and the performance plan date, rating scale, and employment information for the following year. The supervisor's latest actions can also be viewed by the employee. The employee can view the Elements and Standards tab and cannot edit the plan if it is finalized by a manager.

For more information see:

Performance - Existing Plan

To view or modify an existing performance plan:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.

3. Select the ***Performance*** component. The Performance Request page is displayed.

Figure 36: Performance Request Page

4. Click **Existing Plan**. The Emp Views Plan page - Find an Existing Value tab is displayed with a list of available plans.

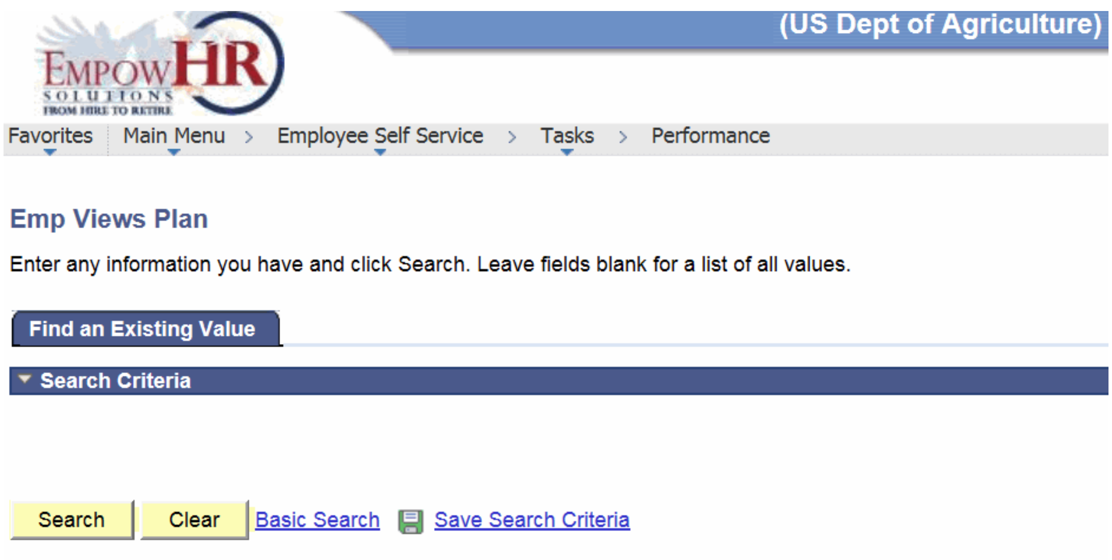


Figure 37: Emp Views Plan Page - Find an Existing Value Tab

5. Select the applicable plan. The Performance Page - Performance Plan tab is displayed.

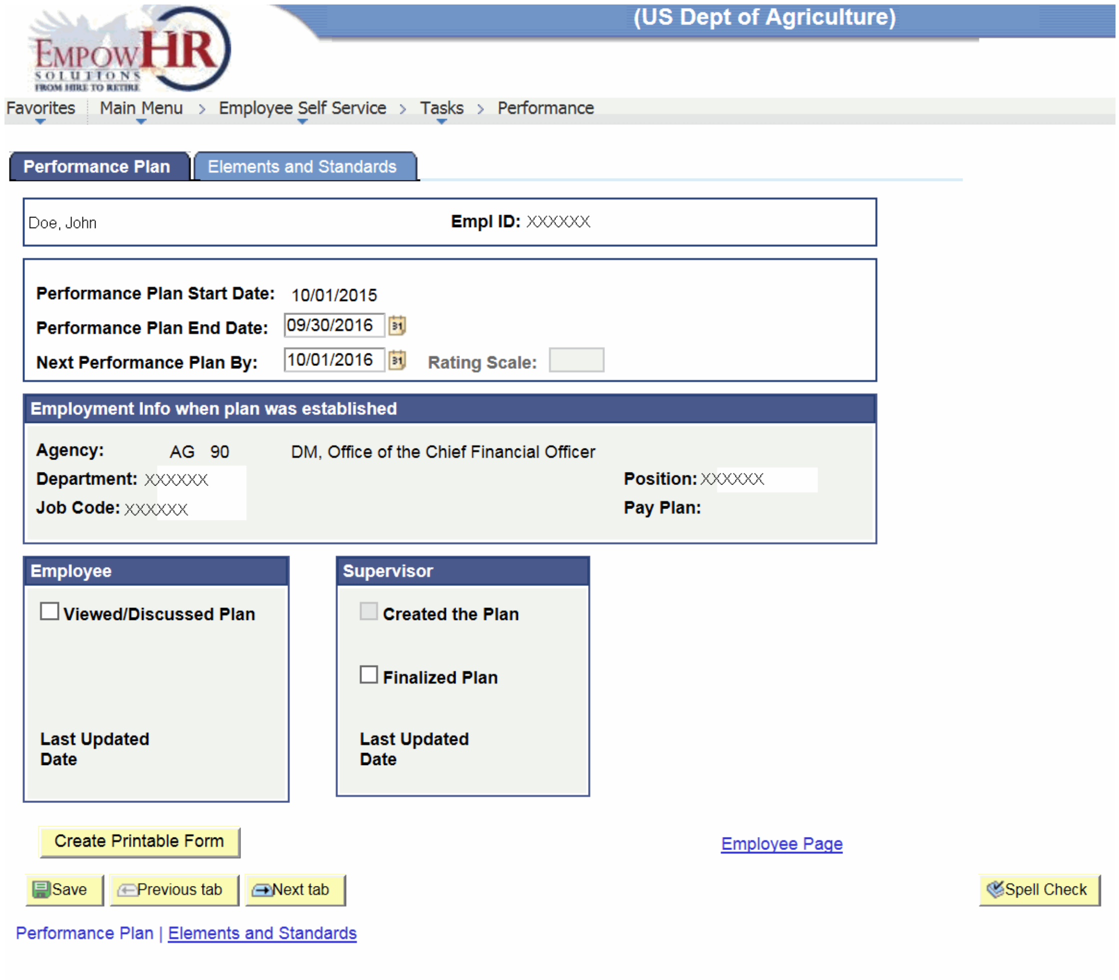


Figure 38: Performance Page - Performance Plan Tab

Note: There are fields on this page that are populated from other pages in the application. These fields cannot be modified.

6. Complete the fields as follows:

Field	Description/Instruction
EmplID	Populated when the employee signs on to ESS.
Performance Plan Start Date	Populated from the Manager Self Service (MSS) entry.
Performance Plan End Date	Populated from the MSS entry.
Next Performance Plan By	Populated based upon the MSS entry in the Performance Plan End Date field.

Field	Description/Instruction
Rating Scale	Populated from the MSS entry.
Employment Info when plan was established	**Description**
Agency	Populated from the ESS logon.
Department	Populated from the ESS logon.
Position	Populated from the ESS logon.
Job Code	Populated from the ESS logon.
Pay Plan	Populated from the ESS logon.
Employee	**Description/Instruction**
Viewed/Discussed Plan	Check this box when the employee has viewed the plan and/or discussed the plan with the supervisor.
Last Updated Date	Populated after the Viewed Discussed Plan box is checked.
Supervisor	**Description/Instruction**
Created the Plan	Populated from the MSS entry.
Finalized Plan	Check this box once the plan is finalized.
Last Updated Date	Populated from the MSS entry.

7. Click **Save**.

8. Select the Elements and Standards tab. The Performance Page - Elements and Standards tab is displayed.

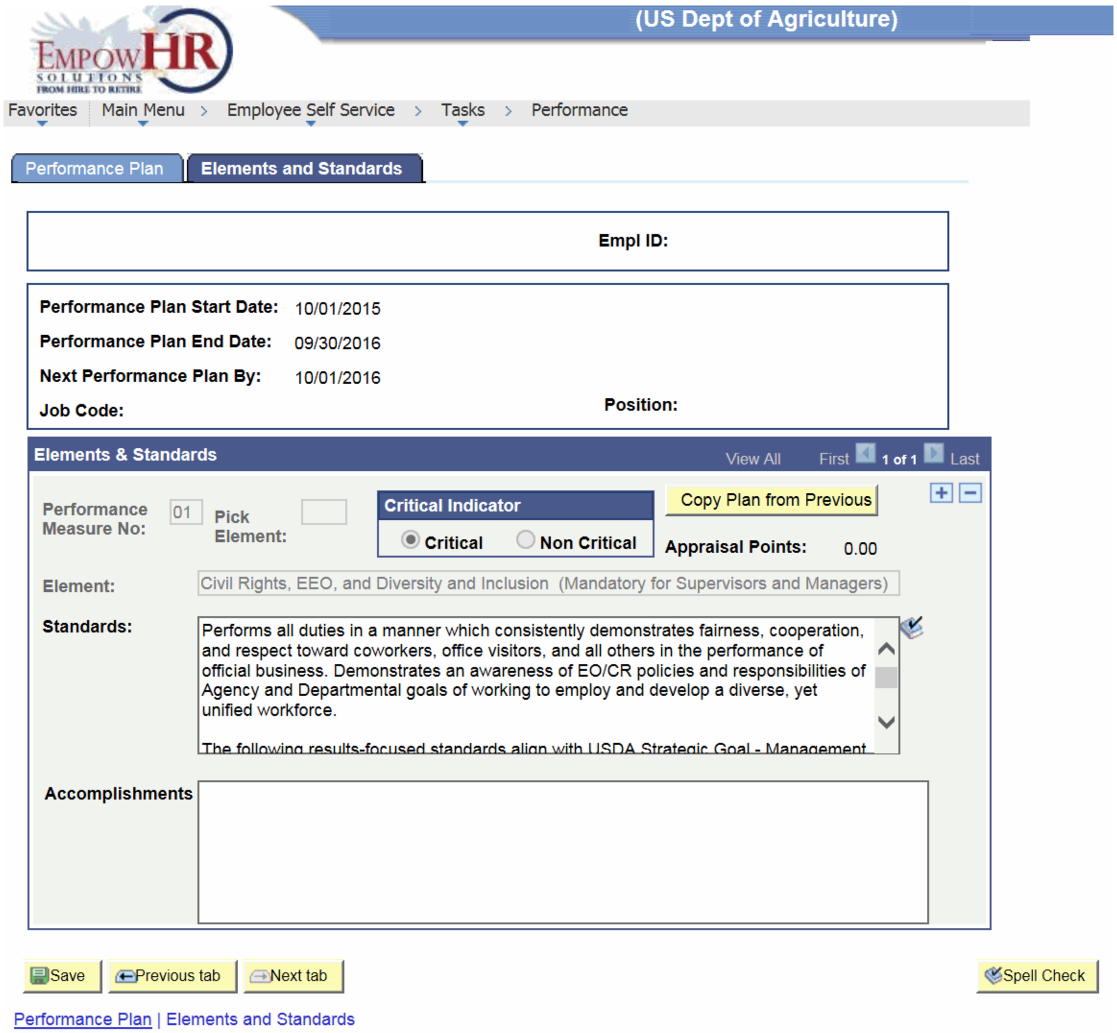


Figure 39: Performance Page - Elements and Standards Tab

9. Complete the fields as follows:

Field	Description/Instruction
EmplID	Populated from the MSS entry.
Performance Plan Start Date	Populated from the MSS entry.
Performance Plan End Date	Populated from the Progress Review tab.
Next Performance Plan By	Populated from the Progress Review tab.

Field	Description/Instruction
Job Code	Populated from the ESS logon.
Position	Populated from the ESS logon.
Elements & Standards	**Description/Instruction**
Performance Measure No	Populated with the number of the performance element.
Pick Element	Populated with the number of the element for that performance element.
Critical Indicator	Indicates whether or not the performance element is **`Critical`** or **`Noncritical`**.
Appraisal Points	Indicates the number of points for the selected element.
Element	Populated with the literal name of the element. Change if applicable.
Standards	Populated with the definition corresponding to the element. Change if applicable.
Accomplishments	Enter the applicable accomplishments.

10. Click **Save**.

Performance - Progress Review

The ESS ***Progress Review*** option allows employees to view and edit the progress review, elements, and standards. Employees cannot edit the Critical and Non-Critical Indicator; however, they can edit the standards detail.

To enter or modify a Progress Review:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.

3. Select the ***Performance*** component. The Performance Request page is displayed.

Figure 40: Performance Request Page

4. Click **Progress Review**. The Self Progress Review page - Find an Existing Value tab is displayed.

5. Select a Progress Review.

6. Click **Search**. The Self Progress Review page - Progress Review tab is displayed.

Note: There are fields on this page that are populated from other pages in the application. These fields cannot be changed.

7. Complete the fields as follows:

Field	Description/Instruction
EmplID	Populated from the ESS logon.
Performance Plan Start Date	Populated from the MSS entry.
Next Performance Plan By	Enter the date the next plan is due or select a date from the calendar icon.
Performance Plan End Date	Enter the performance plan end date or select a date from the calendar icon.
Perf Plan Reviewed Date	Enter the date that the performance plan was reviewed.
Review Type	Populated with the type of review being performed from the MSS entry.

Field	Description/Instruction
Employment Info when plan was established	**Description/Instruction**
Rating Scale	Populated from the MSS entry.
Dept	Populated from the ESS logon.
Agency	Populated from the ESS logon.
Position	Populated from the ESS logon.
Pay Plan	Populated from the ESS logon.
Job Code	Populated from the ESS logon.
Supervisor	Populated from the MSS entry.
***Eval Type**	Populated from the MSS entry.
Reviewer Comments	Populated from the MSS entry.
Employee Comment	Enter the comments for the progress review. Note: Click **Add More Comments** to add additional reviewer or employee comments.
Employee	**Instruction**
Viewed/Discussed	Check this box if the employee viewed the performance plan and if the manager has discussed the plan with the employee. The current date is populated.
Refused Rating	Check this box if the employee refused the rating.
Supervisor	**Description**
Created Review/Rating	Checked if the supervisor created/reviewed the progress review. The current date is populated.
Reviewer	
Concurred Rating	Checked if the reviewer has reviewed the progress review. The current date is populated.

8. Click **Save**.

9. Select the ***Elements and Standards*** tab. The Self Progress Review page - Elements and Standards tab is displayed.

10. Complete the fields as follows:

Field	Description/Instruction
EmplID	Populated from the MSS entry.
Performance Plan Start Date	Populated from the MSS entry.
Performance Plan end Date	Populated from the Progress Review tab.
Next Performance Plan By	Populated from the Progress Review tab.
Performance Plan Reviewed Date	Populated from the Progress Review tab.
Job Code	Populated from the ESS logon.
Position	Populated from the ESS logon.
Elements and Standards	**Description/Instruction**
Performance Measure No	Populated with the number of the performance element.
Critical Indicator	Indicates whether or not the performance element is **`Critical`** or **`Noncritical`**.
Element	Populated with the literal name of the element. Change if applicable.
Standards	Populated with the definition corresponding to the element. Change if applicable.
Accomplishments	Enter the applicable accomplishments.

11. Click **Save**.

12. Click **Spell Check** to check the spelling of the Standards.

13. Click **Return to Search**.

OR

Click **Progress Review**. The Self Progress Review page - Performance Plan tab is displayed.

Performance - Summary Rating

The ESS ***Summary Rating*** option allows employees to view or edit summary ratings (final rating). When the employee selects the Summary Rating button, any rating that is started is displayed.

To review/edit a Summary Rating:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Performance*** component. The Performance Request page is displayed.

Figure 41: Performance Request Page

4. Click **Summary Rating**. The Self Summary Rating page - Find an Existing Value tab is displayed with a list of available ratings.

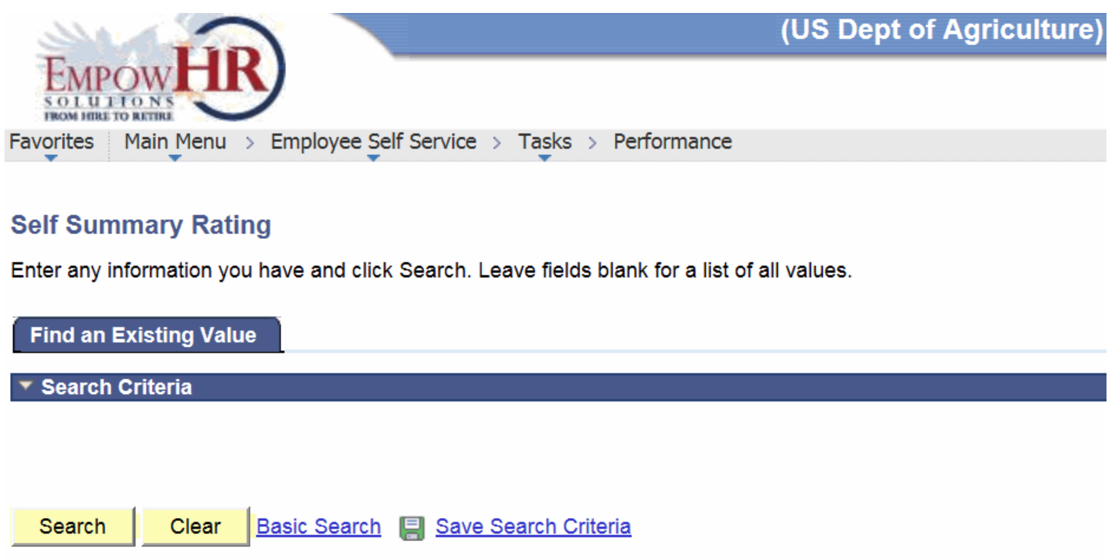


Figure 42: Self Summary Rating Page - Find an Existing Value Tab

5. Select a Summary Rating.

6. Click **Search**. The Self Summary Rating page - Summary Rating tab is displayed.

Note: There are fields on this page that are populated from other pages in the application. These fields cannot be modified.

7. Complete the fields as follows:

Field	Description/Instruction
EmplID	Populated from the ESS logon.
Performance Plan Start Date	Populated from the MSS entry.
Next Performance Plan By	Enter the date the next plan is due or select a date from the calendar icon.
Performance Plan End Date	Enter the performance plan end date or select a date from the calendar icon.
Perf Plan Reviewed Date	Enter the date that the performance plan was reviewed.
Review Type	Click the down arrow to select the type of review.
Summary Rating	Populated from the MSS entry.
Employment Info when plan was established	**Description/Instruction**
Rating Scale	Populated from the MSS entry.
Dept	Populated from the ESS logon.
Agency	Populated from the ESS logon.
Position	Populated from the ESS logon.
Pay Plan	Populated from the ESS logon.
Job Code	Populated from the ESS logon.
Supervisor	Populated from the MSS entry.
***Eval Type**	Populated from the MSS entry.
Reviewer Comments	Populated from the MSS entry.

Field	Description/Instruction
Employee Comment	Enter the comments for the progress review. Note: Click **Add More Comments** to add additional reviewer or employee comments.
Employee	**Instruction**
Viewed/Discussed	Check this box if the employee reviewed the summary rating and if the manager has discussed the plan with the employee. The current date is populated.
Refused Rating	Check this box if the employee refused the rating.
Supervisor	**Description**
Created Review/Rating	Checked if the supervisor created/reviewed the summary rating. The current date is populated.
Reviewer	**Instruction**
Concurred Rating	Check this box if the reviewer concurred with the rating.

8. Select the ***Elements and Standards*** tab. The Self Summary Rating page - Elements and Standards tab is displayed.

9. Complete the fields as follows:

Field	Description/Instruction
EmplID	Populated from the ESS logon.
Performance Plan Start Date	Populated from the MSS entry.
Performance Plan end Date	Populated from the Progress Review tab.
Next Performance Plan By	Populated from the Progress Review tab.
Perf Plan Reviewed Date	Populated from the Progress Review tab.
Job Code	Populated from the ESS logon.
Position	Populated from the ESS logon.
Summary Rating	Populated from the MSS entry.
Elements and Standards	**Description/Instruction**
Performance Measure No	Populated with the number of the performance element.

Field	Description/Instruction
Element Rating	Populated with the sequential number of the element.
Critical Indicator	Indicates whether or not the performance element is **`Critical`** or **`Noncritical`**.
Element	Populated with the literal name of the element. Change if applicable.
Standards	Populated with the definition corresponding to the element. Change if applicable.
Accomplishments	Enter the applicable accomplishments.

10. Click **Save**.

ESS – View

The ***View*** option is used to view ESS documents

This section includes the following topics:

Viewing Training Summary Data

To View Training Summary Data:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***View*** menu.
3. Select the ***Training Summary*** component. The Training History page is displayed. This page displays any training taken by the user.

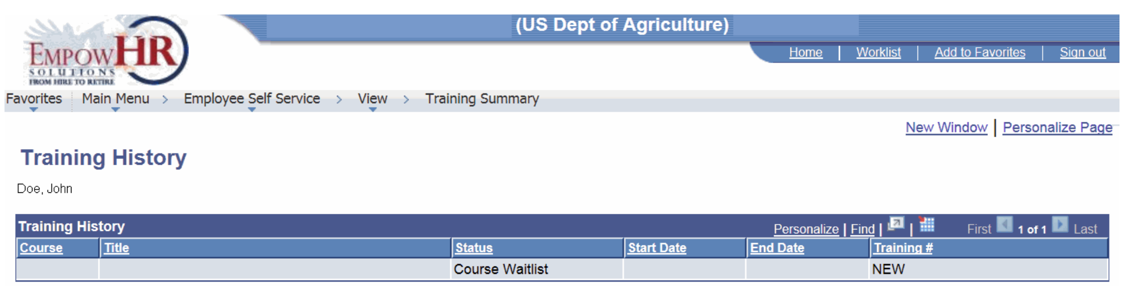


Figure 43: Training History Page

Viewing Award Data Tracking

To Track an Award:

1. Select the ***Employee Self Service*** menu group.

2. Select the ***View*** menu.

3. Select the ***Award Tracking*** component. The Award Tracking page - Search Criteria tab is displayed.

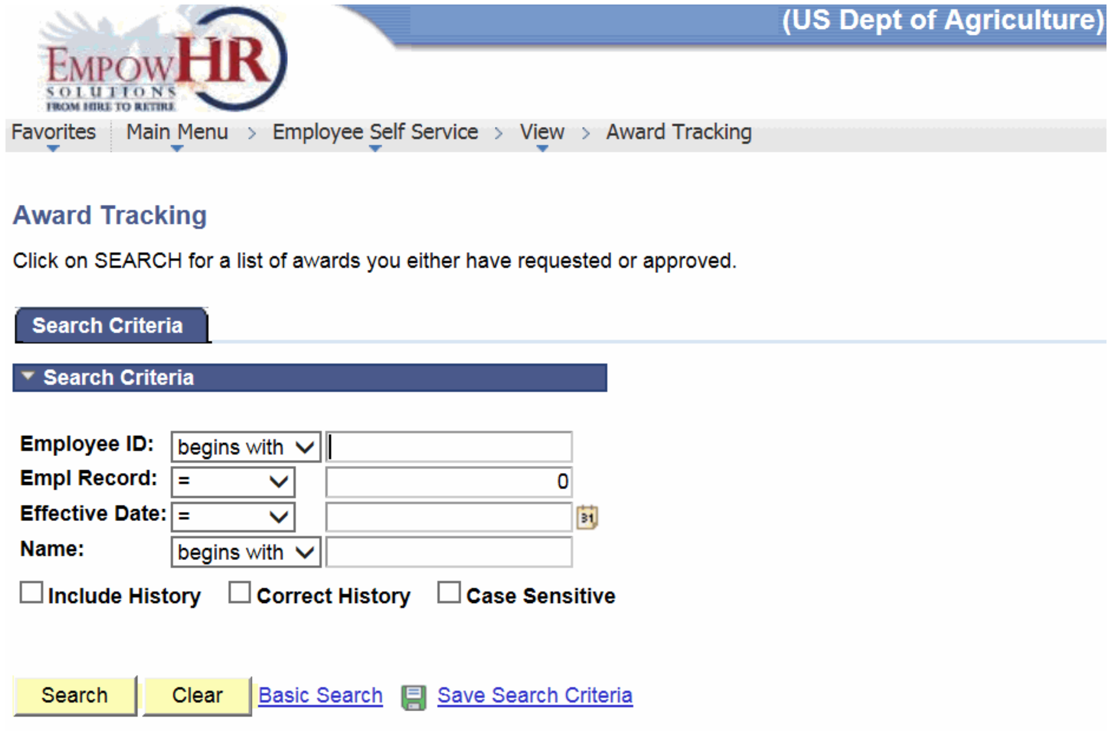


Figure 44: Award Tracking Page - Search Criteria Tab

4. Complete the fields as follows:

Field	Description/Instruction
Employee ID	Enter the EmplID.
Empl Rcd Nbr	Enter the employee record number.
Effective Date	Enter the effective date or select a date from the calendar icon.
Name	Enter the name.

5. Click **Search**. The Award Request for page is displayed.

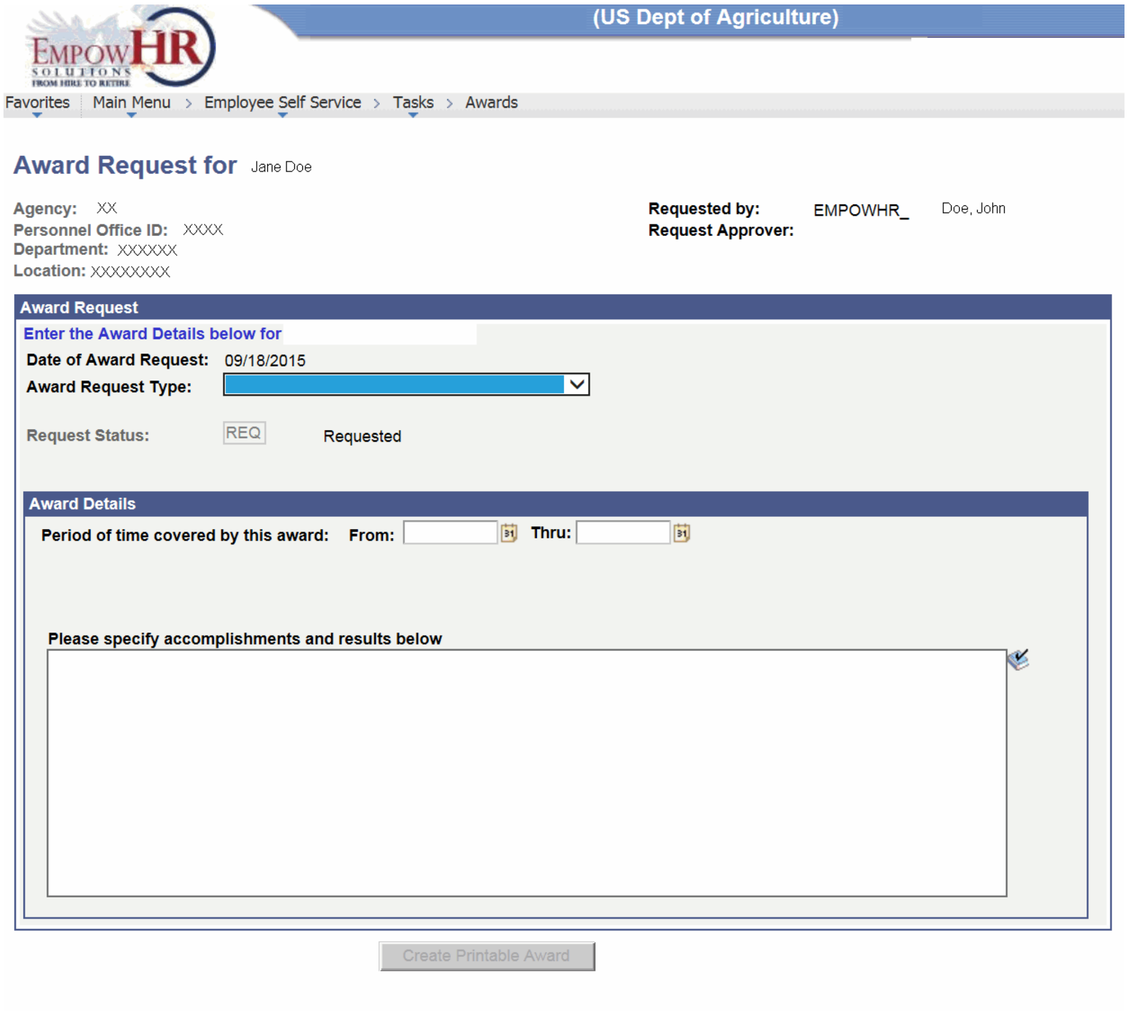


Figure 45: Award Request for Page

Viewing Job Information

To View Job Information:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***View*** menu.

3. Select the ***Job Information*** component. The Employee Job Information page is displayed.

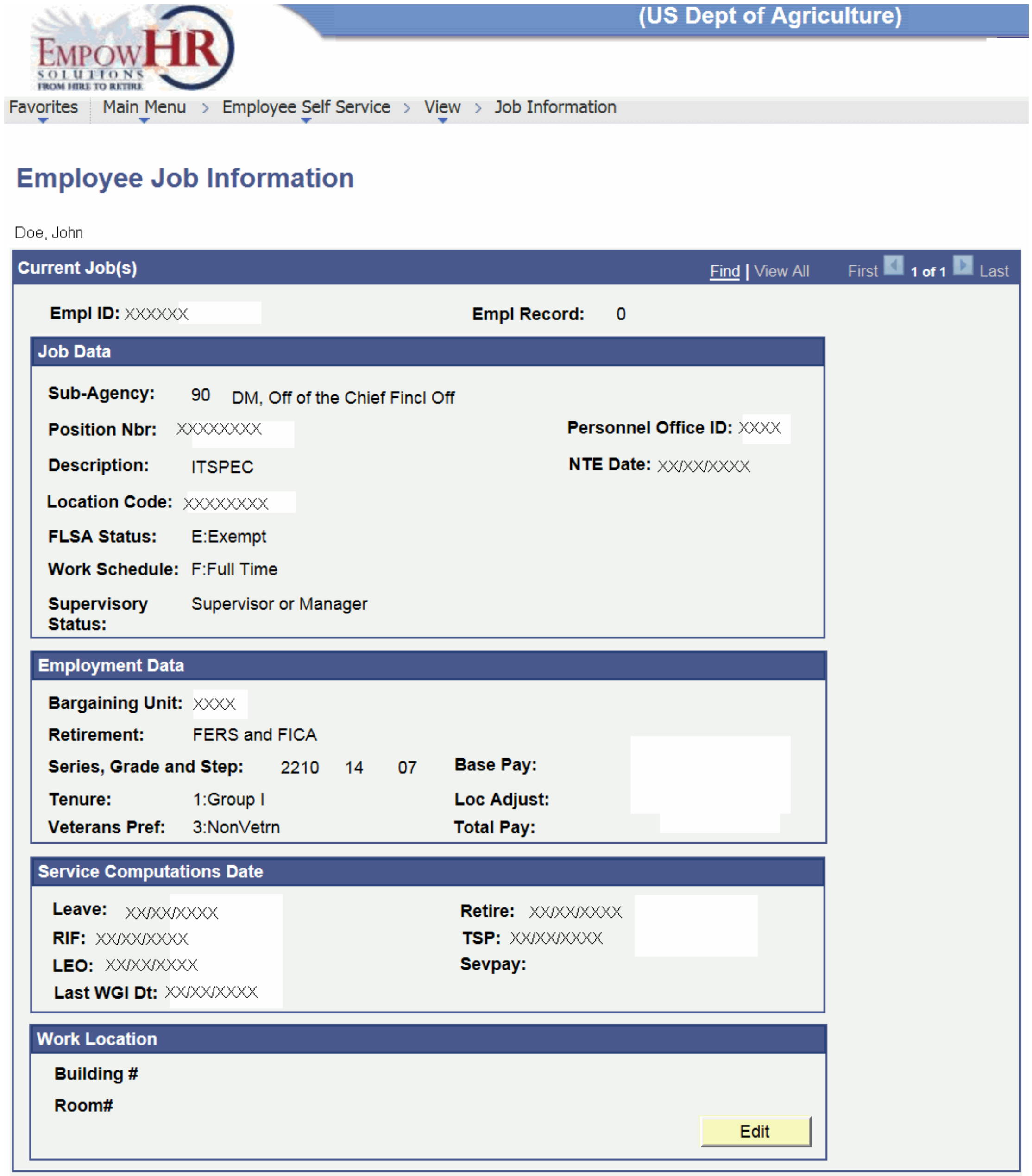


Figure 46: Employee Job Information Page

Viewing Personal Information

For information on personal information, see the ***Personal Information Summary*** (on page 63) section.

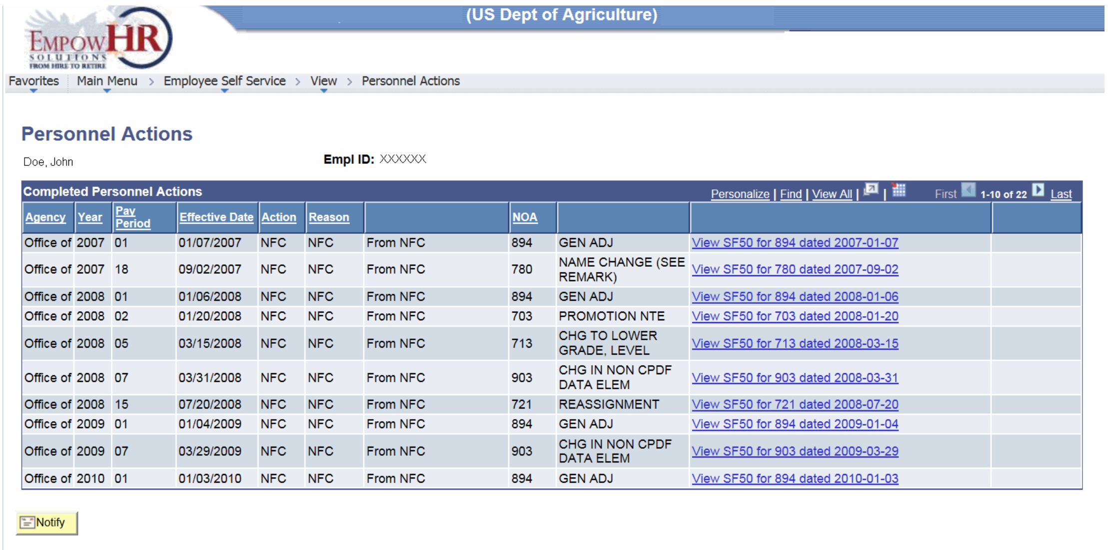
Viewing/Printing Personnel Actions

To View/Print Personnel Actions:

1. Select the ***Employee Self Service*** menu group.

2. Select the ***View*** menu.

3. Select the ***Personnel Actions*** component. The Personnel Actions page (View) is displayed.



Agency	Year	Pay Period	Effective Date	Action	Reason		NOA			
Office of	2007	01	01/07/2007	NFC	NFC	From NFC	894	GEN ADJ	View SF50 for 894 dated 2007-01-07	
Office of	2007	18	09/02/2007	NFC	NFC	From NFC	780	NAME CHANGE (SEE REMARK)	View SF50 for 780 dated 2007-09-02	
Office of	2008	01	01/06/2008	NFC	NFC	From NFC	894	GEN ADJ	View SF50 for 894 dated 2008-01-06	
Office of	2008	02	01/20/2008	NFC	NFC	From NFC	703	PROMOTION NTE	View SF50 for 703 dated 2008-01-20	
Office of	2008	05	03/15/2008	NFC	NFC	From NFC	713	CHG TO LOWER GRADE, LEVEL	View SF50 for 713 dated 2008-03-15	
Office of	2008	07	03/31/2008	NFC	NFC	From NFC	903	CHG IN NON CPDF DATA ELEM	View SF50 for 903 dated 2008-03-31	
Office of	2008	15	07/20/2008	NFC	NFC	From NFC	721	REASSIGNMENT	View SF50 for 721 dated 2008-07-20	
Office of	2009	01	01/04/2009	NFC	NFC	From NFC	894	GEN ADJ	View SF50 for 894 dated 2009-01-04	
Office of	2009	07	03/29/2009	NFC	NFC	From NFC	903	CHG IN NON CPDF DATA ELEM	View SF50 for 903 dated 2009-03-29	
Office of	2010	01	01/03/2010	NFC	NFC	From NFC	894	GEN ADJ	View SF50 for 894 dated 2010-01-03	

Figure 47: Personnel Actions Page (View)

4. Select the applicable action to view.

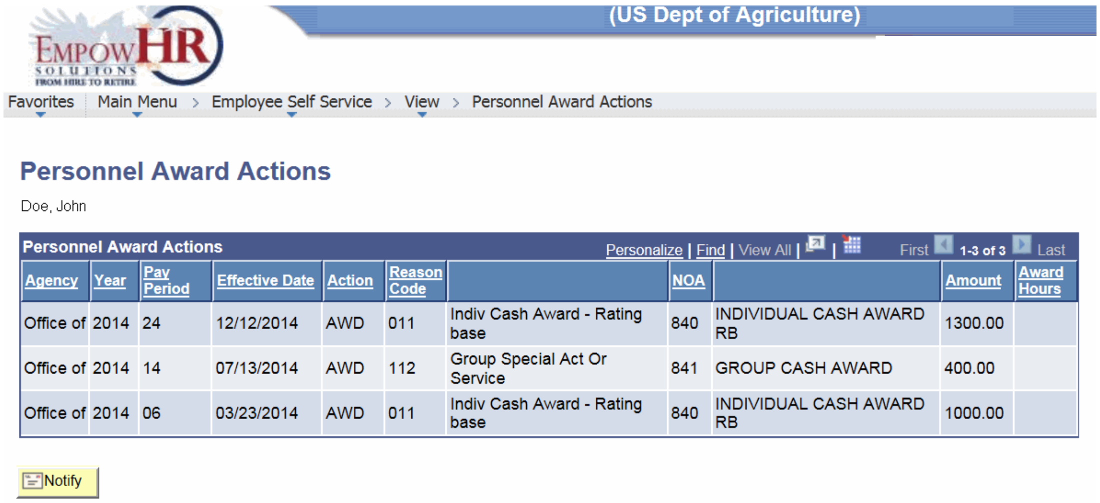
Viewing Personnel Award Actions

To View a Personnel Award Actions:

1. Select the ***Employee Self Service*** menu group.

2. Select the ***View*** menu.

3. Select the ***Personnel Award Actions*** component. The Personnel Award Actions page is displayed.



Agency	Year	Pay Period	Effective Date	Action	Reason Code		NOA		Amount	Award Hours
Office of	2014	24	12/12/2014	AWD	011	Indiv Cash Award - Rating base	840	INDIVIDUAL CASH AWARD RB	1300.00	
Office of	2014	14	07/13/2014	AWD	112	Group Special Act Or Service	841	GROUP CASH AWARD	400.00	
Office of	2014	06	03/23/2014	AWD	011	Indiv Cash Award - Rating base	840	INDIVIDUAL CASH AWARD RB	1000.00	

Figure 48: Personnel Award Actions Page

4. Click **Notify** to send an email message.

Viewing Position Descriptions

When the HR Office enters a position description (PD) into EmpowHR, this feature allows the user to view it.

To View a Position Description:

1. Select the ***Employee Self Service*** menu group.

2. Select the ***View*** menu.

3. Select the ***Position Description*** component. The Position Description page is displayed.

Figure 49: Position Description Page

4. Click **Create Printable Form**. This may take several moments to complete.

5. Click **View Position**. This will display a PD. View or print the PD.

Viewing Work List Data

When an Employee/Manager accesses EmpowHR, the work list provides an instant view of the status of requested items. ESS actions requiring approval will appear on the work list. The work list provides the employee/manager the up-to-date information concerning requests. Employees/managers can select any item to either view or make corrections.

This section explains to users how to view an item on a work list.

To View Work List Data:

1. Click the ***Worklist*** link at the top of the page.

OR

Click ***Worklist*** from the menu.

2. Select the applicable work list item to be worked under the Link column. The applicable item from the work list to be worked is displayed.

3. Click ***Home*** to exit the selected work list item.

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