NFC
Procedures

National Finance Center
Office of the Chief Financial Officer
U.S. Department of Agriculture

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EmpowHR – Version 9.0 Section 8 – Employee Self Service

TITLE I
Payroll/Personnel Manual

CHAPTER 17
EmpowHR

SECTION 8
Employee Self Service

Table Of Contents

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, LWOP, change in work schedule, etc.). 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 contains the following topics:

Career Plan

This section contains the following topic:

Entering A Career Plan

To modify or view a Career Plan:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Click ***Edit Unapproved Career Plan*** to view the unapproved career plan.

   OR

   Click ***Fix Approved Career Plan*** to fix the established career plan.

   OR

   Click ***Initiate Career Plan*** to create the career plan.

   OR

   Click ***View Career Plan*** to view the established career plan.
4. Click ***Add a C/W/L***. The Certifications/Warrants/Licenses (C/W/L) page (**Figure 1**) is displayed.

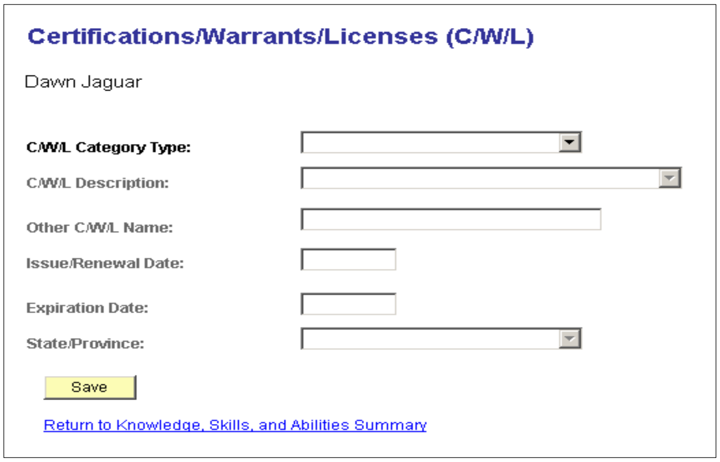


Figure 1. Certifications/Warrants/Licenses (C/W/L) page

5. Complete the fields as follows:

C/W/L Category Type	Enter the applicable information or select data from the drop-down list.
C/W/L Description	Enter the applicable information or select data from the drop-down list.
Other C/W/L Name	Enter the applicable information or select data from the drop-down list.
Issue/Renewal Date	Enter the applicable date.
Expiration Date	Enter the applicable date.
State/Province	Enter the State/Province or select data from the drop-down list.

6. Click **Save**.

Exit Interview

This section contains the following topic:

Entering Exit Interview Data

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 Find An Existing Value tab - Exit Interview page (**Figure 2**) is displayed.

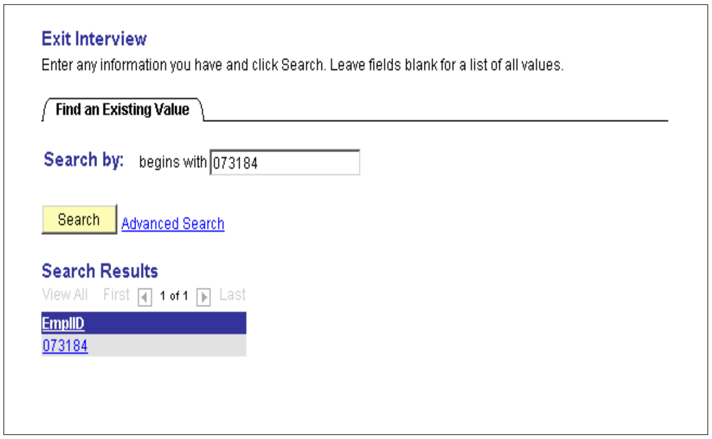


Figure 2. Find An Existing Value tab - Exit Interview page

4. Complete the field as follows:

Search By/Begins With	Enter the EmplID.

5. Click **Search**. The Exit Interview page (**Figure 3**) is displayed.

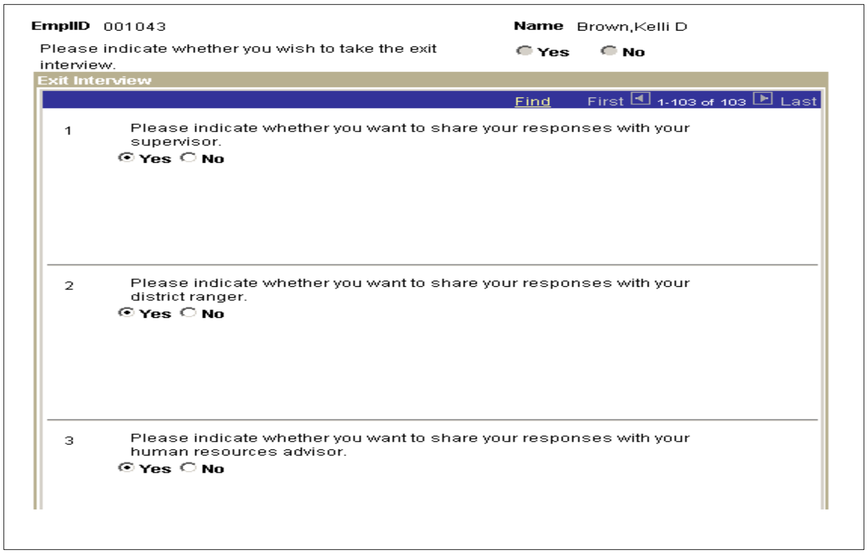


Figure 3. Exit Interview page

6. Complete the field as follows:

Please Indicate Whether You Want To Take The Exit Interview	Check `Yes` or `No`.

Decline Date	If `No` is checked, enter the decline date or select a date from the calendar icon

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

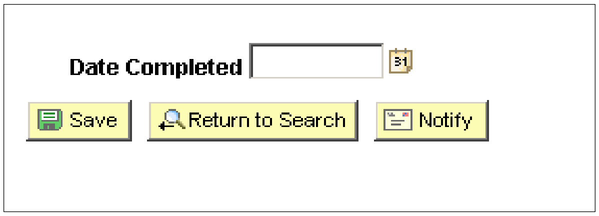


Figure 4. Exit Interview page

7. Complete the field as follows:

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

8. Click **Save**.

9. Click **Return To Search**. The Find An Existing Value tab - Exit Interview page (**Figure 2**) is displayed.

   OR

   Click **Notify** to send an email.

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 re-classification.

This section contains the following topic:

Entering Job Classification Request Data

Entering Job Classification Request Data

To add or update an existing Job Classification Request::

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

2. Select the ***Task*** menu.

3. Select the ***Job Classification*** component. The Find An Existing Value tab - Classification Request page (**Figure 5**) is displayed.

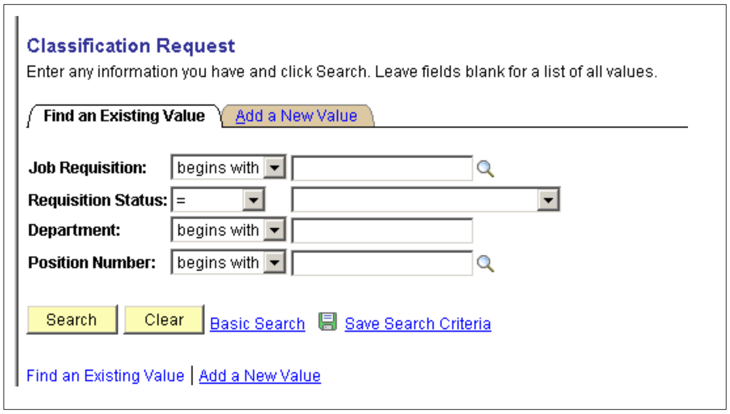


Figure 5. Find An Existing Value tab - Classification Request page

4. Complete the fields as follows:

Job Requisition	Enter the job requisition number or select data by clickin-g the search icon.
Requisition Status	Enter the Requisition Status or select data from the drop-down list.
Department	Enter the department.
Position Number	Enter the position number or select data by clicking the search icon.

5. Click **Search**. The Job Classification Request page (**Figure 7**) is displayed.

OR

Click **Clear** to clear the entry.

OR

Select the ***Add A New Value*** tab. The Add A New Value tab - Classification Request page (**Figure 6**) is displayed.

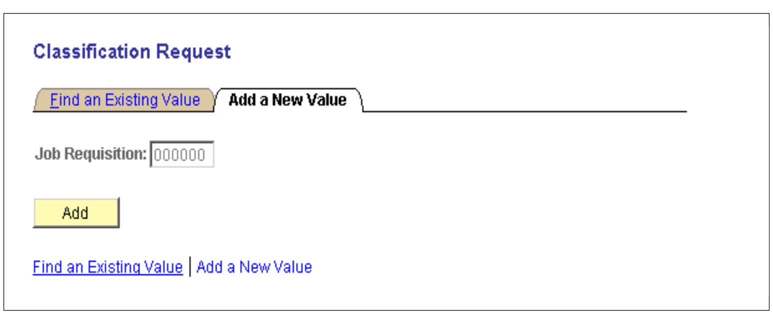


Figure 6. Add A New Value tab - Classification Request page

6. Complete the fields as follows:

Job Requisition Enter the job requisition.

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

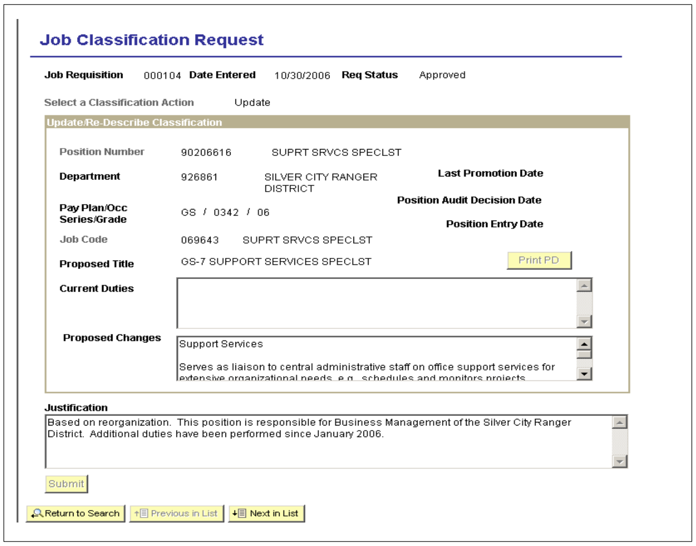


Figure 7. Job Classification Request page

8. Complete the fields as follows:

Note: There are fields on this page that are populated from other pages and cannot be modified.

Job Requisition This field is populated.

Date Entered This field is the system date or the current date and cannot be changed.

Req Status This field is populated.

Select A Classification Action This field defaults to `Updates` and cannot be changed.

Position Number If the employee is in more than one position (detailed and permanent), select the permanent position to be classified. If there is one position, the field will default to that position.

Pay Plan/Occ Series/Grade This field is populated based on the position number selected.

Last Promotion Date This field is populated and cannot be changed.

Position Audit Decision Date	This field is populated and cannot be changed.
Position Entry Date	This is the date the position is entered and cannot be changed.
Job Code	This field is populated based on the position number selected.
Proposed Title	Enter the proposed title of the position.
Current Duties	This field displays the current duties of the position.
Proposed Changes	Enter the proposed changes to the duties of the position.
Justification	Enter the justification for the change.

9. Click **Submit**. The request is entered into the workflow for approval and processing. Your Position Request Has Been Entered Into Workflow (99999999,999) pop-up (**Figure 8**) is displayed.

Figure 8. Your Position Request Has Been entered Into Workflow pop-up

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.

11. Click **Print PD** to print a copy of the job description.

Personnel Actions

This section contains the following topic:

Entering Personnel Action Data

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 Action Proposed Effective Date page (**Figure 9**) is displayed.

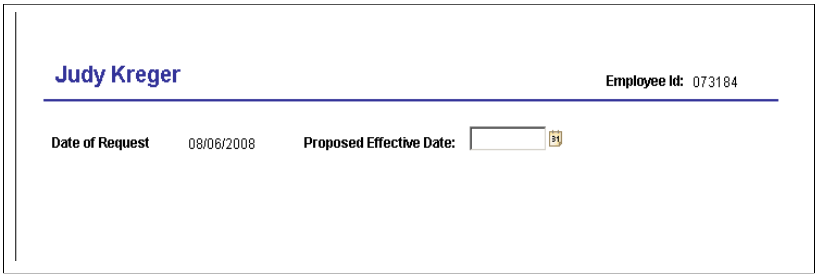


Figure 9. Personnel Action Proposed Effective Date page

1. Complete the fields as follows:

Date Of Request	This field is populated.
Proposed Effective Date	Enter the proposed effective date or select a date from the calendar icon.

2. The Personnel Action PAR Category page (**Figure 10**) is displayed.

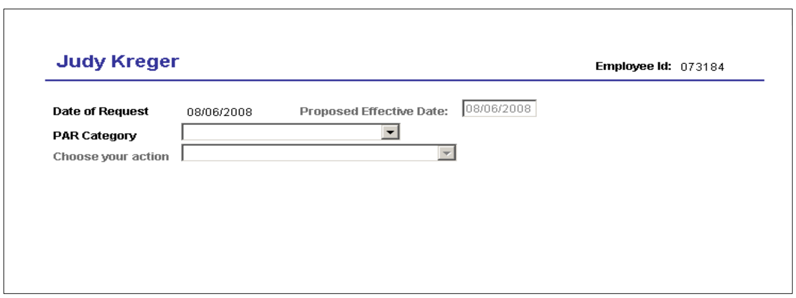


Figure 10. Personnel Action Par Category page

3. Complete the fields as follows:

Date Of Request	This field is populated.
Proposed Effective Date	This field is populated with the date entered on the Personnel Action Proposed Effective Date page (**Figure 9**).
***PAR Category**	Select data from the drop-down list. The valid values are: `Change Request`, `Placement in Non Pay Status`, `Placement in Pay Status`, `Registration`, `Retirement`, and `Travel Savings Incentives`.
***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.

4. The Personnel Action page (**Figure 11**) is displayed. The fields on this page are dependent on the PAR Category and Choose Your Action selections.

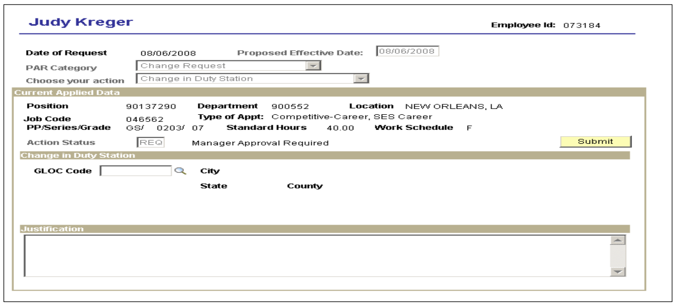


Figure 11. Personnel Action page

5. Complete the fields as follows:

Date Of Request	This field is populated.
Proposed Effective Date	This field is populated with the date entered on the Personnel Action Proposed Effective Date page (**Figure 9**).
***PAR Category**	This field is populated with the selection on the Personnel Action PAR Category page (**Figure 10**).
***Choose Your Action**	This field is populated with the selection on the Personnel Action PAR Category page (**Figure 10**).
Position	This field is populated.
Department	This field is populated.
Location	This field is populated.
Job Code	This field is populated.
Type Of Appt	This field is populated.
PP/Series/Grade	This field is populated.
Standard Hours	This field is populated.
Work Schedule	This field is populated.

Action Status	This field is populated.
GLOC Code	Enter the GLOC code.
City	This field is populated based upon the GLOC Code entered.
State	This field is populated based upon the GLOC Code entered.
County	This field is populated based upon the GLOC Code entered.
Justification	Enter the justification for the action.

6. Click **Submit** to submit the personnel action. The Workflow Confirmation pop-up (**Figure 12**) is displayed.

Figure 12. Workflow Confirmation pop-up

7. Click **OK**. The Successfully Saved Confirmation pop-up (**Figure 13**) is displayed.

Figure 13. Successfully Saved Confirmation pop-up

8. Click **OK**.

Skills Information

Provided below are instructions for entering Skill Information.

This section is divided into the following topics:

Entering Skills Data

To enter Skills data:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu
3. Select the ***Skills Information*** component. The Skills Information page (**Figure 14**) is displayed.

Figure 14. Skills Information page

Education

This section contains the following topic:

Entering And Modifying Education Data

To add or modify Education data:

4. Click ***Education***. The Education page (**Figure 15**) is displayed.

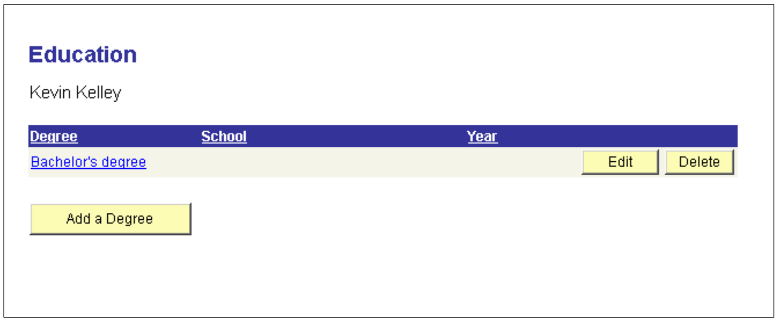


Figure 15. Education page

5. Click **Add A Degree**. The Education Detail page (**Figure 16**) is displayed.

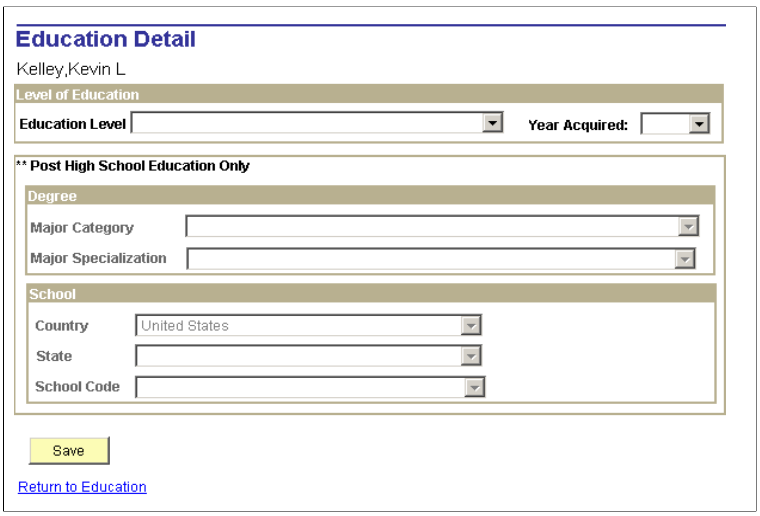


Figure 16. Education Detail page

6. Complete the fields as follows:

***Education Level**	Enter the applicable data or select data from the drop-down list.
Year Acquired	Enter the applicable year or select data from the drop-down list.
Major Category	Enter the applicable data or select data from the drop-down list.
Major Specialization	Enter the applicable data or select data from the drop-down list.
County	Enter the applicable data or select data from the drop-down list.

State/Province	Enter the applicable data or select data from the drop-down list.
School	Enter the applicable data or select data from the drop-down list.

7. Click **Save**. The Save Confirmation page (**Figure 17**) is displayed.

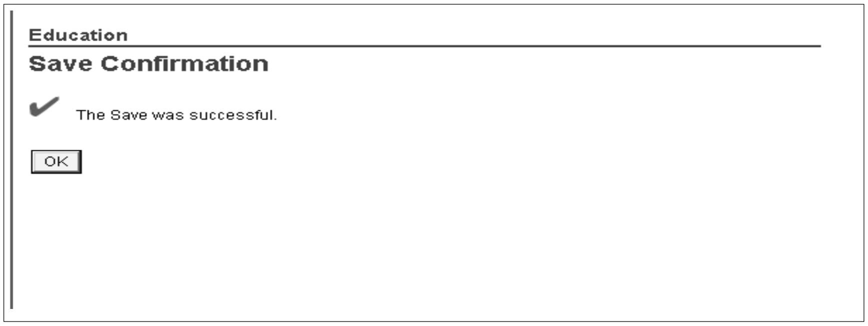


Figure 17. Save Confirmation page

8. Click **OK**. The Education Detail page (**Figure 16**) is displayed.
9. Click ***Return To Education***. The Eduction page (**Figure 15**) is displayed.
10. Click **Edit** to edit the education detail.

    OR

    Click **Delete** to delete education detail.

Languages

This section contains the following topic:

[Entering Language Data]

Entering Language Data

To enter Language data:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu
3. Select the ***Skills Information*** component. The Skills Information page (**Figure 14**) is displayed.

Figure 18. Skills Information page

4. Click ***Languages***. The Languages page (**Figure 19**) is displayed.

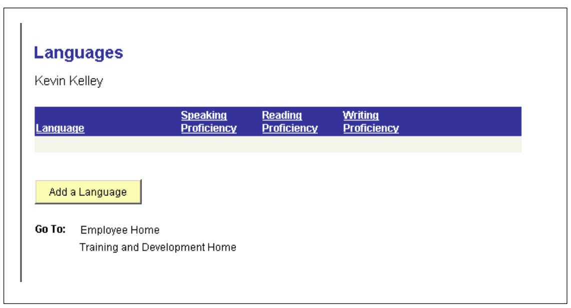


Figure 19. Languages page

5. Click **Add A Language**. The Languages Detail page (**Figure 20**) is displayed.

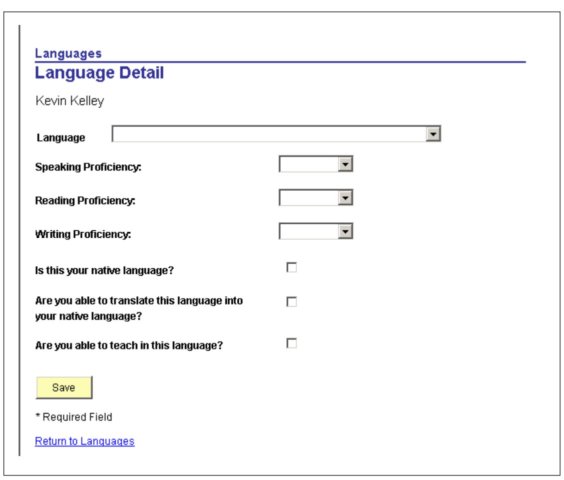


Figure 20. Languages Detail page

6. Complete the fields as follows:

***Language**	Enter the language or select a language from the drop-down list.
Speaking Level	Enter the speaking level of the language or select a level from the drop-down list. The valid values are **`High`**, **`Low`**, and **`Moderates`**.
Reading Level	Enter the reading level of the language or select a level from the drop-down list. The valid values are **`High`**, **`Low`**, and **`Moderate`**.
Writing Level	Enter the writing level of the language or select a level from the drop-down list. The valid values are **`High`**, Low, and Moderate.
IsThis Your Native Language?	Check this box if the response is yes.
Are You Abele To Translate The Language Into Your Native Language?	Check this box if the response is yes.
Are You Able To Teach In This Language?	Check this box if the response is yes.

7. Click **Save**. The Languages Save Confirmation page (**Figure 21**) is displayed

Figure 21. Languages Save Confirmation page

8. Click **OK**. The Languages page (**Figure 19**) is displayed.

Licenses/Certificates

This section contains the following topic:

[Entering License/Certificate Data]

Entering License/Certificate Data

To enter License/Certificate data:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu
3. Select the ***Skills Information*** component. The Skills Information page (**Figure 14**) is displayed.

Figure 22. Skills Information page

1. Click the ***Licenses And Certificates*** option. The Licenses and Certificate page (**Figure 23**) is displayed.

Figure 23. Licenses/Certificates page

2. Click the ***Add A Licence/Certificate***. The Licenses/Certificates Detail page (**Figure 24**) is displayed.

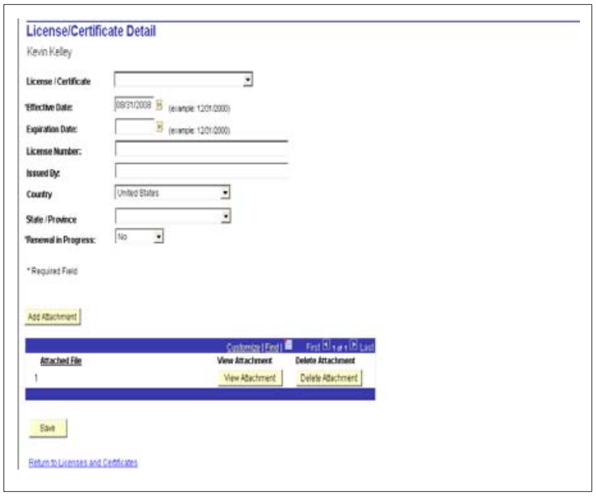


Figure 24. Licenses/Certificates Detail page

3. Complete the fields as follows:

***License/Certificate**	Enter the type of license/certificate or select data from the drop-down list. The valid values may vary by agency.
Effective Date	Enter the date the license or certificate was issued or select a date from the calendar icon. (XX/XX/XXXX)
Expiration Date	Enter the data the license or certificate expires or select a date from the calendar icon. (XX/XX/XXXX)
License Number	Enter the license or certificate number.
Issued By	Enter the applicable information.
Country	This field defaults to USA. Change data by clicking on the search icon.
State/Province	Enter the state/province where the license/certificate was acquired.
***Renewal in Progress**	This field defaults to No. Change by selecting data from the drop-down list.

4. Click **Add Attachment** to attach the applicable information. The Add Attachment page (**Figure 25**) is displayed

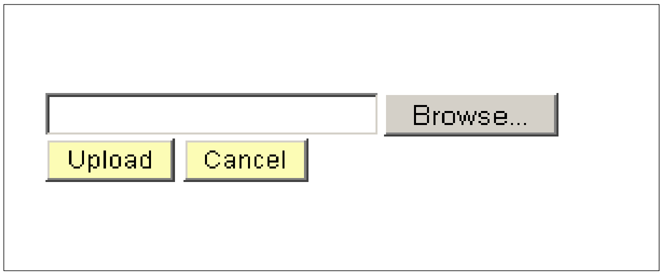


Figure 25. Add Attachement page

5. Click **Browse** and select the document to attach.
6. Click **Upload** to add an attachment.

   OR

   Click **Cancel** to return to the Licenses/Certificates Detail page (**Figure 24**).
7. Click **Save**.
8. Click **OK**.

Professional Training

This section contains the following topic:

Entering Professional Training Data

To enter Professional Training data:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu
3. Select the ***Skills Information*** component. The Skills Information page (**Figure 14**) is displayed.

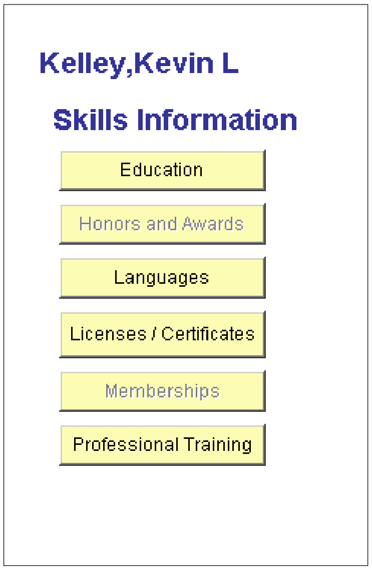


Figure 26. Skills Information page

4. Click the ***Professional Training*** option. The Professional Training page (**Figure 27**) is displayed.

Figure 27. Professional Training page

5. Click ***Add A Professional Training Course***. The Professional Training Detail page (**Figure 28**) is displayed.

Figure 28. Professional Training Detail page

6. Complete the fields as follows:

***Course Name**	Enter the the course name.
Course Completion Date	Enter the date the course was completed or select a date from the calendar icon.
School/Facility Where Course Was Taken	Enter the school/facility where the course was taken.

7. Click **Save**. The Save Confirmation page (**Figure 27**) is displayed.

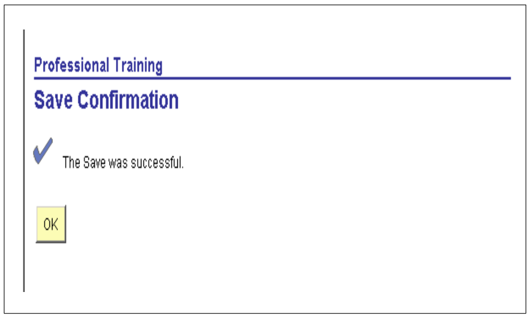


Figure 29. Professional Training Save Confirmation page

8. Click **OK**. The Professional Training page (**Figure 27**) is displayed.

9. Click ***Enroll In An Internal Training Course***. The Request Training Enrollment page (**Figure 30**) is displayed.

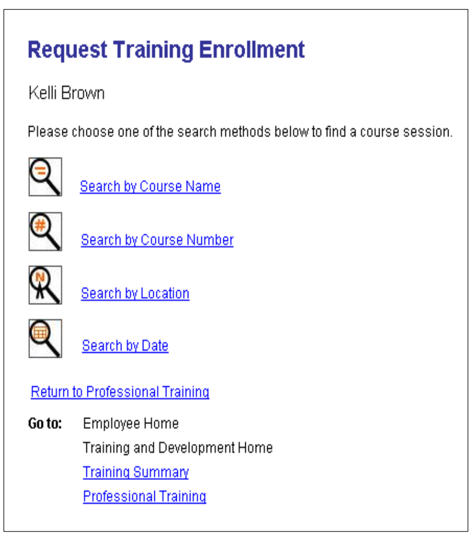


Figure 30. Request Training Enrollment page

Note: Select the applicable link to search for a course session or to return to the prior menu options.

10. Click **Save**.

EmpowHR Education

This section contains the following topic:

Entering EmpowHR Education Data

To update Education Data:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***EmpowHR Education*** component. The Education page (**Figure 31**) is displayed.

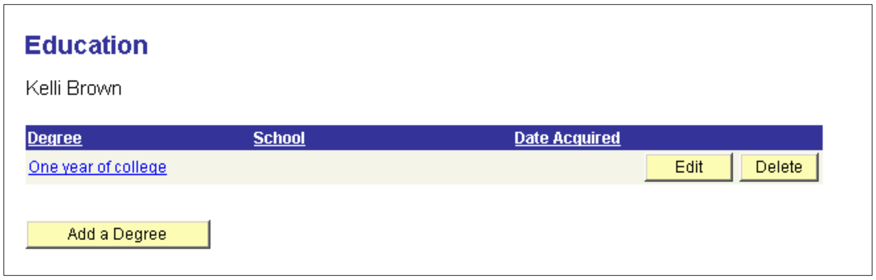


Figure 31. Education page

4. Click **Add A Degree**. The Detail Education page (**Figure 32**) is displayed.

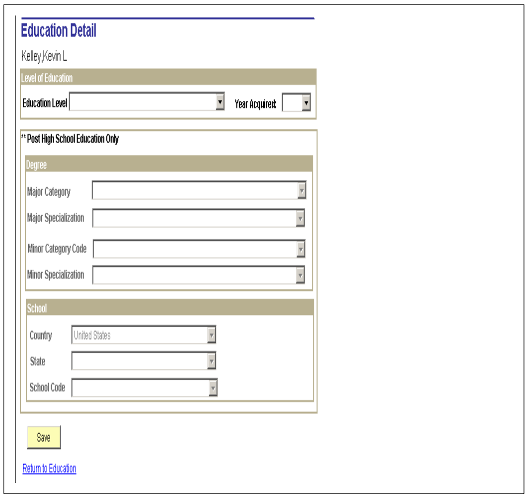


Figure 32. Education Detail page

5. Complete the fields as follows:

***Education Level**

This field identifies the employee's highest level of education based on the number of years of formal schooling and/or academic degrees or certificates. Enter the applicable information or select data from the drop-down list. The valid values are as follows:

Education Level Valid Values
One year of College
2 Years of College, No Degree
3 Years of College, No Degree
4 Years of College, No Degree
Advanced Masters (6 yr degree)
Associate Degree
Bachelor's Degree
Doctorate Degree
Elementary School Completed
High School/GED
Post Advanced Masters, with degree
Post HS, Occupational
Post HS, Tech Degree
Post HS, Professional Degree
Post Bachelor's Degree (Non-degree)
Professional (e.g. MD)
Some High School

Year Acquired

Enter the year or select data 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 education level.

Education Major

Enter the applicable information or select data from the drop-down list. The Education Major field identifies the employee's major field of study beyond high school. Complete this field and Year Degree/Certificate received only if the Educational Level field is:

- Code 6 – Terminal occupational program - certificate of completion, diploma or equivalent.
- Code 10 Associate Degree.

OR

- Code 13 or higher (Bachelor degree or higher).

Major Specialization

Enter the applicable information or select data from the drop-down list.

Minor Major — Enter the applicable information or select data from the drop-down list. The Education Minor field identifies the employee's minor field of study beyond high school. Complete this field and Year Degree/Certificate received only if the Educational Level field is:

- Code 6 – Terminal occupational program - certificate of completion, diploma or equivalent.

  OR
- Code 10 Associate Degree.

  OR
- Code 13 or higher (Bachelor degree or higher).

Minor Specialization — Enter the applicable information or select data from the drop-down list.

Country — This field defaults to USA United States. To change the data select from the drop-down list.

State/Province — Enter the applicable data or select data from the drop-down list.

School — Enter the applicable data or select data from the drop-down list.

School Was Not In List — Check this box if the school is not in the drop-down list. If this box is checked, enter the school name in the Please Specify the School Name field.

Please Specify The School Name — If the School Was Not In List box is checked, enter the school name.

6. Click **Save**. The Save Confirmation page (**Figure 33**) is displayed.

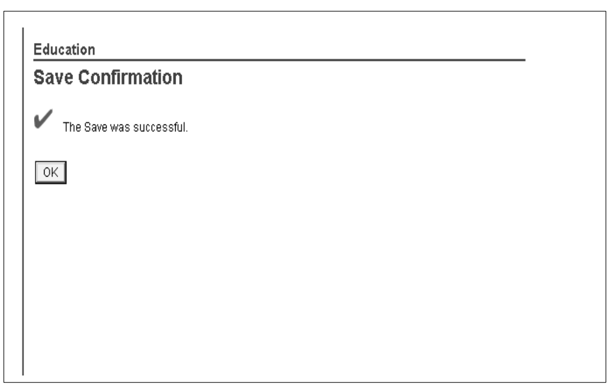


Figure 33. Save Confirmation page

7. Click **OK**. The Education page (**Figure 31**) is displayed.

8. Click **Edit** to modify the degree.

   OR

   Click **Delete** to delete the degree.

Payroll Documents

The Payroll Documents module of ***EmpowHR*** contains payroll and benefit related information. Employees can access and update data. The ESS Payroll Documents have additional instruction in the application to mimic the Employee Personal Page located on the NFC's Home Page for ease of use.

This section is divided into the following topics:

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 1st. However, entries received after that data will be processed.
- Do not enter one-time cash contributions in EmpowHR; make the contribution in accordance with the agency DFC 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 1st pay period beginning after receipt of the written revocation.
- The Office of Personnel Management 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 two.

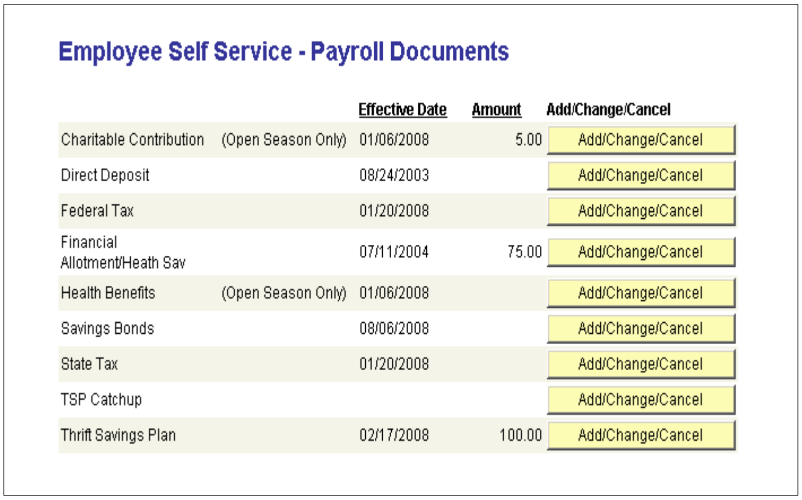
This example will show how to enter data for an employee who wants to (1) authorize, (2) change, or (3) cancel biweekly payroll deductions for charitable contributions to the Combined Federal Campaign.

This section contains the following topic:

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. The Charitable Contributions page is displayed.



Employee Self Service - Payroll Documents

		Effective Date	Amount	Add/Change/Cancel
Charitable Contribution	(Open Season Only)	01/06/2008	5.00	Add/Change/Cancel
Direct Deposit		08/24/2003		Add/Change/Cancel
Federal Tax		01/20/2008		Add/Change/Cancel
Financial Allotment/Heath Sav		07/11/2004	75.00	Add/Change/Cancel
Health Benefits	(Open Season Only)	01/06/2008		Add/Change/Cancel
Savings Bonds		08/06/2008		Add/Change/Cancel
State Tax		01/20/2008		Add/Change/Cancel
TSP Catchup				Add/Change/Cancel
Thrift Savings Plan		02/17/2008	100.00	Add/Change/Cancel

Figure 34. Employee Self Service - Payroll Documents page

4. Select ***Add/Change/Cancel*** next to Charitable Contributions. The Charitable Contributions page (**Figure 35**) is displayed.

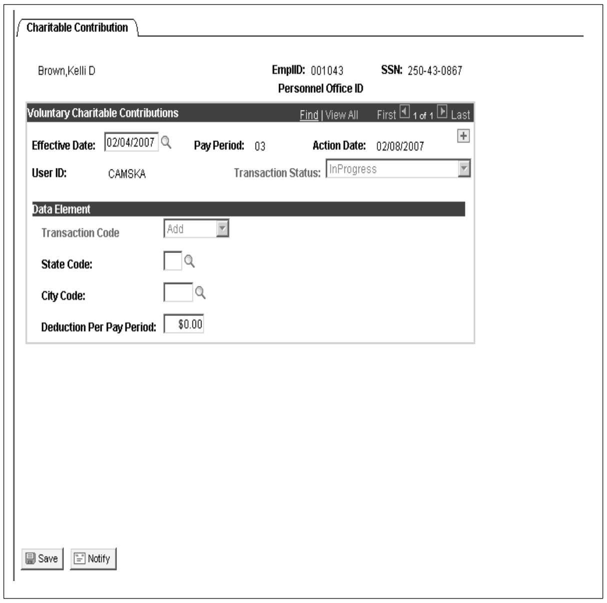


Figure 35. Charitable Contributions page

5. Complete the fields as follows:

Effective Date	Enter the date the charitable contribution was entered or select data by clicking the search icon.
Action Date	This field is populated and cannot be changed.
User ID	This field is populated when the employee signs on to Employee Self Service.
Transaction Status	This field defaults to In Progress and reflects the status of the transaction. The transaction status will change when the transaction is saved, in SINQ, or resent to NFC.
Transaction Code	Enter the applicable information or select data from the drop-down list. The valid values are Add, Change, and Delete.
State Code	Enter the state code or select data by clicking on the search icon.
City Code	Enter the city code or select data by clicking on the search icon.

Deduction Per Pay Period	Enter the amount of charitable deduction to be withheld per pay period.

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

Direct Deposit

Direct Deposit allows net pay of net pay into a checking or savings account at a financial organization through 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

This section contains the following topics:

Changing Net Pay
Canceling Net Pay

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

Cancelling 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.

This section contains the following topic:

Entering Canceled Net Pay Data

Entering Canceled Net Pay Data

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 the ***Add/Change/Cancel*** Direct Deposit The Direct Deposit page (**Figure 36**) is displayed.

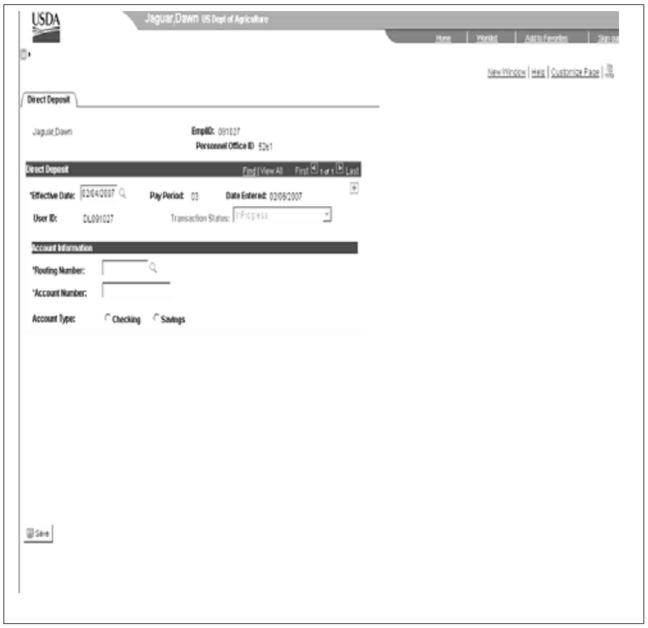


Figure 36. Direct Deposit page

5. Complete the fields as follows:

Effective Date	This field is automatically populated with the beginning date of the current pay period. Change the date if applicable.
Date Entered	This date is populated.
User ID	This field is populated when the employee signs on to Employee Self Service.
Transaction Status	This field defaults to In Progress and reflects the status of the transaction. The transaction status will change when the transaction is saved, in SINQ, or resent to NFC.
***Routing Number**	Enter the routing number of the bank or select data by clicking on the search icon.
***Account Number**	Enter the account number of the direct deposit.

Account Type/Checking	Check this box if the account is a checking account.
Account Type/Savings	Check this box if the account is a savings account.
School	Enter the applicable data or select data from the drop-down list.

6. Click **Save**.

7. Click **OK**.

Federal Tax Data

Federal tax is withheld through payroll deductions based on the processing of Form W−4. Federal income tax withholding is based on an IRS formula that includes a calculation of 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 be 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.

This section contains the following topic:

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 the ***Add/Change/Cancel*** Federal Tax. The Federal Tax page (**Figure 37**) is displayed.

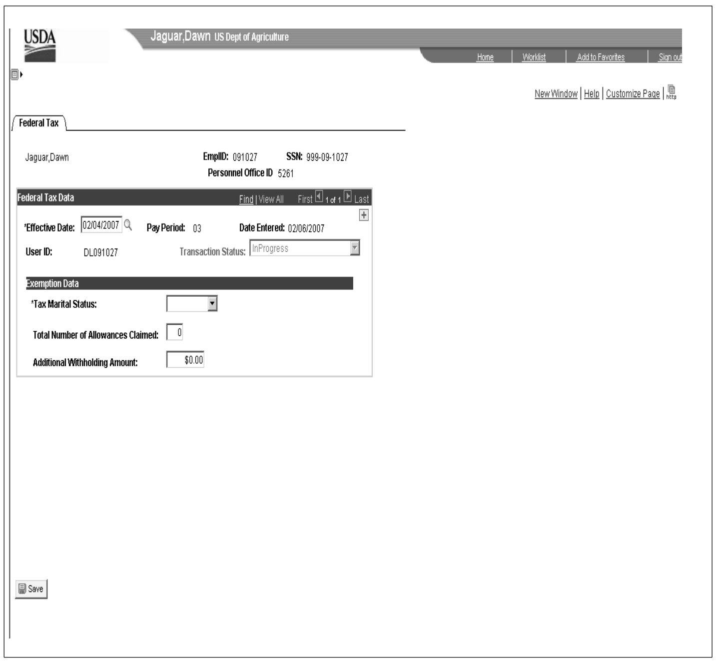


Figure 37. Federal Tax Data page

5. Complete the fields as follows:

Effective Date	This field is populated with the beginning date of the current pay period. This field can be changed. Select data by clicking on the search icon.
User ID	This field is populated when the employee signs on to Employee Self Service.
Transaction Status	This field defaults to In Progress and reflects the status of the transaction. The transaction status will change when the transaction is saved, in SINQ, or resent to NFC.
***Tax Marital Status**	Enter the tax marital status or select data from the drop-down list.

Total Number Of Allowances Claimed	Enter the number of exemption.
Additional Withholding Amount	Enter the additional amount to be withheld over the amount deduction for the number of exemptions.

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, savings bonds, thrift savings, garnishments, union, or other organizational dues. For these changes, see your personnel office.

In order to participate in 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 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 VA benefits within the previous three months.

This section contains the following topic:

Entering/Change/Cancel 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 ***Add/Change/Cancel*** button next to Financial Allotment. The Financial Allotment page (**Figure 38**) is displayed.

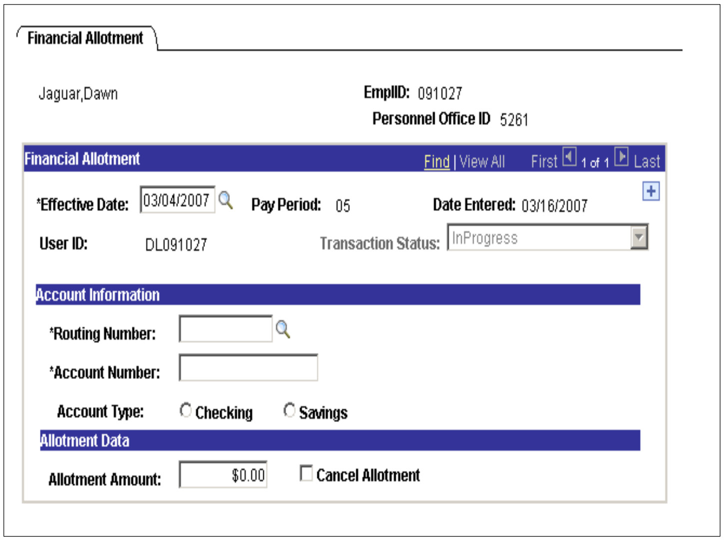


Figure 38. Financial Allotment page

5. Complete the fields as follows:

Effective Date	This field is populated with the beginning date of the current pay period. This field can be changed. Select data by clicking on the search icon.
User ID	This field is populated when the employee signs on to Employee Self Service.
Transaction Status	This field defaults to In Progress and reflects the status of the transaction. The transaction status will change when the transaction is saved, in SINQ, or resent to NFC.
***Routing Number**	Enter the routing number of the bank or select data by clicking on the search icon.
***Account Number**	Enter the account number of the direct deposit.
Account Type/Checking	Check this box if the account is a checking account.
Account Type/Savings	Check this box if the account is a savings account.
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 Health Benefits (FEHB) Change Request entered during Open Season will be effective Pay Period 01. If you meet the criteria for a ”qualifying life event” and wish to have your FEHB change effective on a different date, please see your servicing personnel office. The major ”Qualifying Life Events” (QLEs) that permit enrollment or change in enrollment outside of open season are:

- A 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 leave without pay status or because you were in leave without pay 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 cancellation 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.

This section contains the following topic:

Entering/Change/Cancel 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 the ***Add/Change/Cancel*** button Health Benefits. The Health Benefits Elections page (**Figure 39**) is displayed.

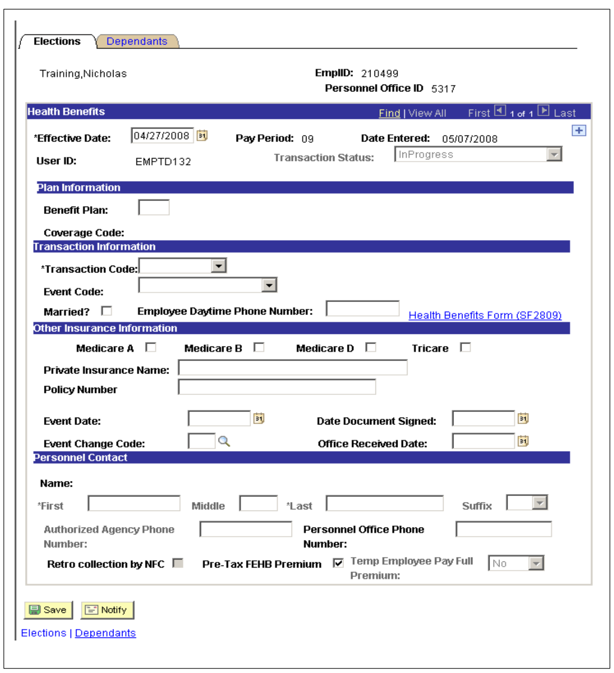


Figure 39. Health Benefits Elections page

5. Complete the fields as follows:

Effective Date	This field is populated with the beginning date of the current pay period. This field can be changed. Select data by clicking on the search icon.

User ID	This field is populated when the employee signs on to Employee Self Service.
Transaction Status	This field defaults to In Progress and reflects the status of the transaction. The transaction status will change when the transaction is saved, in SINQ, or resent to NFC.
Benefit Plan	Enter the health benefit plan.
Transaction Code	Enter the applicable information or select data from the drop-down list. The valid values are Add, Change, and Delete.
Event Code	Enter the applicable data or select data from the drop-down list.
Married?	Check this box if the applicant is married.
Employee Daytime Phone Number	Enter the phone number of the applicant.
Medicare A	Check this box if applicable.
Medicare B	Check this box if applicable.
Medicare D	Check this box if applicable.
Tricare	Check this box if applicable.
Private Insurance Name	Enter the private insurance name if the applicant has additional insurance.
Policy Number	Enter the policy number if the applicant had 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.

Office Received Date	Enter the date the office received the document or select a date from the calendar icon.
Event Change Code	Enter the event change code or select data by clicking the search icon.
***First**	Enter the first name of the personnel contact.
Middle	Enter the middle name of the personnel contact if applicable.
***Last**	Enter the last name of the personnel contact.
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 Premium	This box is checked. Uncheck if the pre-tax premium is no.
Temp Employee Pay full Premium	This field defaults to No. Change by selecting data from the drop-down list.
Personnel Office Phone Number	Enter the phone number of the personnel office for the personnel contact.

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 Dependents page (**Figure 40**) is displayed.

   OR

   Click the ***Dependents*** tab at the top of the page. The Dependents page (**Figure 40**) is displayed.

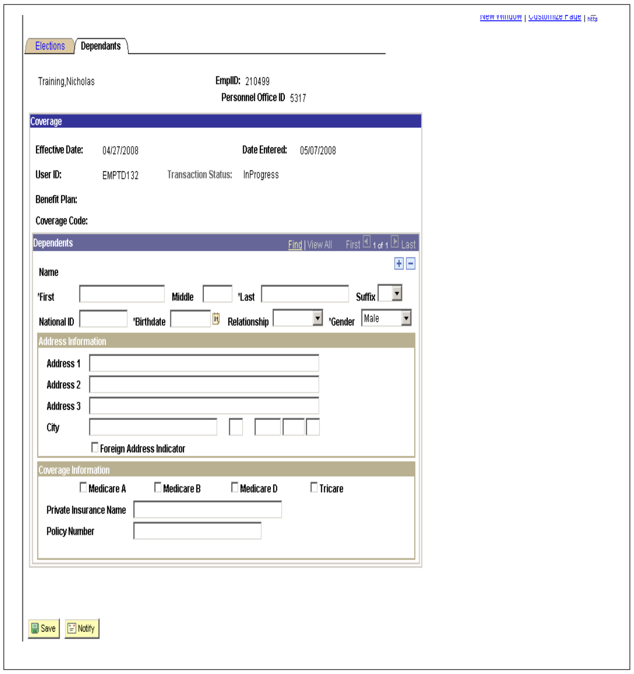


Figure 40. Health Benefits Dependents page

9. Complete the fields as follows:

Effective Date	This field is populated with the beginning date of the current pay period. This field can be changed. Select data by clicking on the search icon.
User ID	This field is populated when the employee signs on to Employee Self Service.
Benefit Plan	The health benefit plan is populated from the elections page.
Transaction Status	The transaction status is based on the status of the transaction. When the transaction is saved, the status will change.
***First**	Enter the first name of the personnel contact.
Middle	Enter the middle name of the personnel contact if applicable.
***Last**	Enter the last name of the personnel contact.
Suffix	Enter the suffix if applicable or select data from the drop-down list. The valid values are:

Suffix Valid Values
I
II
IV
Jr
Sr
V
VI

***Birthdate** Enter the birthdate of the dependent or select a date from the calendar icon.

Relationship Enter the relationship between the applicant and the dependent or select data from the drop-down list. The valid values are:

Relationship Valid Values
Adopted Ch
Child < 22
Child > 22
Foster Ch
Spouse
Stepchild

***Gender** Enter the gender of the dependent or select data from the drop-down list. The valid values are:

Gender Valid Values
Male
Female
Unknown

Address 1 Enter the first line of the dependent's address.

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/State/ Postal Code Enter the city, state, and zip code of the address.

Foreign Address Indicator Check this box if the address is in a foreign country.

Medicare A	Check this box if applicable.
Medicare B	Check this box if applicable.
Medicare D	Check this box if applicable.
Tricare	Check this box if applicable.
Private Insurance Name	Enter the private insurance name if the applicant has additional insurance.
Policy Number	Enter the policy number if the applicant had additional insurance.

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

11. Click **Save**.

12. Click the ***Elections*** link at the bottom of the page. The Elections page (**Figure 39**) is displayed.

Savings Bonds

Savings bonds documents are used to enter U.S. Series EE and Series I Savings Bonds data for deductions through the Payroll Savings Plan. Bond data is used for preparation of semi-annual bond reports that provides statistics pertaining to bond deductions. The bond account is reflected on the employee's AD−334, Statement of Earnings and Leave. Savings bonds documents are used to add new bonds, update bond data, and cancel existing bonds.

This section will show how to enter data for an employee who wants to purchase U. S. Series EE and Series I savings bonds through voluntary participation in the Payroll Savings Plan.

Before beginning, the following information is needed:

- Form SB−2152, Authorization for Purchase and Request for Change − United States Savings Bonds, and/or Form SB−2253, Authorization for Purchase and Request for Change − United States Inflation−Indexed Savings Bonds

This section contains the following topics:

Savings Bond Overview

Employees may purchase a maximum of 9 allotments for U.S. Series EE and Series I savings bonds combined through voluntary participation in the Payroll Savings Plan. The Payroll Savings Plan is an automatic system for installment purchases of Series EE and Series I Savings Bonds through regular allotments (authorizations) set aside each pay period. Employees may elect to enroll in the Payroll Savings Plan at any time.

The National Finance Center electronically transmits savings bond information to the Federal Reserve Bank (FRB) on the official Thursday payday. FRB prints and distributes savings bonds the following week. Bond owners should receive their bonds within 10 working days after the official payday in which the savings bond was purchased.

Bond Account

The allotment amount specified by the employee is established when the initial bond is entered. This amount is deducted from the employee's salary each pay period. The allotments are accrued in the employee's bond account established in the PPS database until the full purchase price of the bond has been accumulated. At that time, the bond is issued and mailed to the designated bond owner. This cycle continues until the employee cancels the allotment or terminates employment. Upon cancellation of the allotment or termination of employment, the employee's savings bond account is closed in the database.

If the accumulated amount exceeds the purchase price of the bond, the balance is carried forward in the employee's bond account and applied toward the next bond purchase. If any portion of the amount cannot be equally applied toward the purchase of another bond, it is refunded.

Bond Purchase Price

The purchase price of the Series EE bond is one-half of its face value as shown on the bond card. The purchase price of Series I is 100 percent of the face value.

Bond Inscriptions

The savings bond inscription is the owner and/or co–owner/beneficiary information printed on the savings bond. The employee dictates this information. For each savings bond allotment, the savings bond may be issued to a single owner inscription or with a rotating inscription.

This section includes the following topics:

Bond Inscriptions - Single Owner Inscription Option

The single owner inscription option permits the employee to designate one savings bond owner and zero or one co–owner/beneficiary for a savings bond allotment. Each savings bond purchased from one allotment will be issued to the designated bond owner. The owner and co-owner or beneficiary inscription will remain constant until the employee changes the inscription, cancels that savings bond allotment, or terminates employment.

The employee may:

- Designate an adult or minor as the owner and/or co-owner/beneficiary.
- Designate a fiduciary or an organization, private or public, as the owner. If the institution is an employer, the employer identification number assigned to the Internal Revenue Service must be entered on the bond card in lieu of the owner's social security number (SSNO).

Bond Inscription - Rotating Inscription Option

The rotating inscription option allows the employee to have the savings bond resulting from one allotment issued to different designated owners and/or different co-owners or beneficiaries on a recurring, sequential cycle. The employee may designate one to nine owners and zero to nine co-owners and/or beneficiaries. The co-owners or beneficiaries designations may be: zero to nine co-owners, zero to nine beneficiaries, or a combination of co-owners and beneficiaries totaling a maximum of nine (i.e., five co-owners and four beneficiaries, three co-owners and six beneficiaries, etc.). Many issuing combinations are possible through the rotating inscription option.

Each employee may have a maximum of nine separate savings bond accounts for Series EE and Series I combined. Each savings bond account has two subdivisions (a savings bond owner section and a co-owner/beneficiary section).

For a new savings bond allotment under the rotating inscription option, as many as nine bond cards may be required. Even though multiple bond cards are required to transact the rotating inscription option, it is only assigned one authorization number.

The bond owner section may designate a total of nine separate savings bond owners. Savings bonds are issued to a designated owner in a rotating sequential order. The owner rotation is accomplished independently with the savings bond account.

The co-owner/beneficiary section may have a total of nine co-owners or nine beneficiaries, or a combination of co–owners and beneficiaries totaling a maximum of nine. The co-owner/beneficiary inscription is rotated with each savings bond issued and is also accomplished independently with the bond account.

Naming multiple savings bond owners and/or multiple co-owners/beneficiaries causes both the savings bond owners and co–owner/beneficiary inscriptions to change with each savings bond issued. Because the savings bond owner and co-owner/beneficiary designation both rotate independently with the employee's savings bond account, the employee can determine the issuing order and sequence by the procedure illustrated below.

1. List the savings bond owners in order of designation (savings bond owner Number 1, 2, etc.).
2. List the co-owners/beneficiaries in a second column in order of designation, if applicable.
3. List the savings bond to be issued and the inscription to be reflected on that savings bond as the owner and co-owner/beneficiary designation are rotated. Remember the savings bond owner designation rotates independently as does the co-owner/beneficiary designation. (The table below depicts an example of a rotating inscription with six bond owners and four co-owners/beneficiaries.)

Savings Bond Owner	Co–owner/Beneficiary
1–John Snow	1–Karen Rain (co–owner)
2–Susan Snow	2–Betty Rain (beneficiary)
3–Billy Snow	3–Sharon Rain (beneficiary)
4–Sally Snow	4–Randy Rain (co–owner)
5–Mary Snow	
6–Bob Snow	

Inscription Reflected On Savings Bond When Issued

Savings Bond Issued	Savings Bond Owner	Co–owner/Beneficiary
1	1–John Snow	1–Karen Rain
2	2–Susan Snow	2–Betty Rain
3	3–Bill Snow	3–Sharon Rain
4	4–Sally Snow	4–Randy Rain
5	5–Mary Snow	1–Karen Rain
6	6–Bob Snow	2–Betty Rain
7	1–John Snow	3–Sharon Rain
8	2–Susan Snow	4–Randy Rain
9	3–Bill Snow	1–Karen Rain
10	4–Sally Snow	2–Betty Rain
11	5–Mary Snow	3–Sharon Rain
12	6–Bob Snow	4–Randy Rain

Bond Authorization Number

An authorization number is assigned to each savings bond allotment. The authorization number identifies the employee's savings bond account in the database. The assigned authorization number will remain with that particular savings bond allotment until the savings bond allotment is canceled. All future transactions affecting a specific savings bond allotment must show the original assigned authorization number.

Each employee may establish a maximum of nine separate savings bond authorizations for Series EE and Series I in the database. Individually, the savings bond allotment may be for any amount equal to or greater than $3.75. For each authorization, the resultant savings bond may be issued to a single owner or issued with a rotating inscription.

The authorization number assigned to each savings bond allotment plays an important role when the employee wishes to enroll in the Payroll Savings Plan for savings bonds, change any information for the savings bond allotment, or wishes to cancel the savings bond allotment. Verify the authorization number in IRIS Program IR108 when processing a savings bond allotment for an employee.

This includes new allotments to ensure that the employee has no savings bond allotments established in the database and that Authorization Number 1 can be used. If the new savings bond allotment is for an employee who has established savings bond allotments in the database, the next sequential number should be used for the authorization number.

Bond Transfer And Cancellation

An employee who transfers from one department to another department is treated as an accession (this includes departments serviced by the USDA PPS). If the new employee wishes to continue and/or start savings bond allotment(s), enter the bond data from the bond card.

Once established, a savings bond authorization continues until the employee cancels the allotment or terminates employment with the department: Intradepartmental movement (changes in personnel office, agency, duty, station, etc.) does not effect the savings bond allotment(s). The employee's savings bond record in the database is automatically updated when the payroll/personnel changes are processed. No action is required at the time of the intradepartmental reassignment unless the reassignment results in a change of address of a designated bond owner. In such cases, enter the data to change the bond inscription(s).

If an employee is transferring to an agency outside the department, retiring, or resigning, the savings bond allotment(s) are automatically canceled. Any balance remaining in the employee's bond account will be included in the final salary payment. If the employee transfers and wishes to continue voluntary participation in the Payroll Savings Plan, a bond card must be completed and submitted to the gaining organization (this includes departments serviced by the USDA PPS).

In the event of death, the balance remaining in the savings bond account is included in the balance paid to the survivors or an estate.

Bond Non-Receipt

If a savings bond has not been received within 30 days after the expected delivery date, the employee should contact the agency personnel office. If the bond has not been returned to the agency personnel office, the agency personnel office should request the savings bond serial number from NFC through DOTSE. The serial numbers are needed to complete the Department of the Treasury's claim form.

If the savings bond has not been received between 31 and 120 days after the expected delivery date, Form PDF 3062, Claim for Relief on Account of Loss, Theft, or Destruction of United States Savings Bonds After Valid Issue But Prior To Receipt By Owner, Co-owner, Or Beneficiary, must be completed. This form can be obtained from the local servicing Federal Reserve Bank. The completed form should be sent to:

Federal Reserve Bank
Pittsburgh Branch

P.O. Box 299
Pittsburgh, PA 15219

OR

Federal Express Form PDF 3062 to the following address:

Federal Reserve Bank
Pittsburgh Branch
717 Grant Street
Pittsburgh, PA 15230

Claims routed to the Federal Reserve Bank, Pittsburgh Branch with issue dates of more than 120 days old are returned to the agency due to these claims being handled by the Bureau of the Public Debt. The agency should assist the employee in completing Form PDF 3062–4, Claims For Relief On Account Of The Non–receipt Of United States Savings Bonds. This form can be obtained from the local servicing Federal Reserve Bank. The completed form should be sent to:

Bureau of the Public Debt
Parkersburg, WV 26106–1328

If the original savings bond is received in the interim before relief is granted, the claimant should promptly notify Treasury in writing at the address mentioned above. If the application can be canceled in time, no replacement savings bond will be issued.

If the original savings bond is received after the replacement savings bond, the original savings bond should be forwarded promptly to the Department of the Treasury with a letter explaining the reason for the return.

Destroyed, Lost, Stolen, Mutilated, Or Defaced Savings Bonds

A request for a replacement savings bond must be prepared only if the savings bond was received by the owner or representative and was subsequently destroyed, lost, stolen, mutilated, or defaced.

To initiate the replacement of a savings bond, the owner must prepare Form PDF 1048, Application For Relief On Account Of Loss, Theft, or Destruction Of United States Savings And Retirement Securities. This form can be obtained from the local servicing Federal Reserve Bank. The employee should follow the instructions attached to the form and submit the form and the defaced savings bond and all available fragments of a mutilated savings bond, in any form whatsoever, to the following address:

Bureau of the Public Debt
Parkersburg, WV 26106–1328

Undeliverable/Returned Savings Bonds

All undeliverable savings bonds are returned to the Department of the Treasury. The Department of the Treasury returns the original savings bond to NFC for handling.

Upon receipt of undeliverable savings bonds, NFC will determine which agency personnel office services the employee. The original savings bond is then forwarded to the employee’s agency personnel office with a memorandum that provides instructions for sending the savings bond to the employee and asking that the employee's savings bond address be corrected. A bond card must be completed to change an address for savings bond allotments. An employee address document will not change an address for a savings bond allotment.

The agency personnel office should give the original savings bond to the employee, if possible. If the savings bond cannot be given to the employee (e.g., the employee is at another location, separated, etc.) the agency should make every effort to notify the employee of the undeliverable/returned bond so that arrangements can be made to deliver the bond to the employee.

Have the employee complete a bond card to correct the address and enter the address in the system. If a subsequent savings bond is issued before the inscription is changed, it is also returned to the Department of the Treasury and then to NFC. This procedure continues until the address is corrected; therefore, it is important to correct the employee's address in the PPS as soon as possible.

If the agency personnel office is unable to contact the employee within 90 days after the savings bond issue date, forward the savings bond to the Bureau of the Public Debt, Parkersburg, WV 26106–1328, using Form PD 4581 ABC, Forwarding Item Transmittal – U.S. Savings Bonds/Notes – Retirement Plan Bonds – Individual Retirement Bonds. The Remarks block should be annotated with a description of the efforts made to deliver the bond (e.g., "Attempted to contact employee at last known address."). This form can be obtained from the local servicing Federal Reserve Bank.

Forward a deceased employee's bond to the co-owner or beneficiary, if any, and obtain a receipt. If the savings bond cannot be delivered within 30 days to a co-owner or beneficiary, or it is in a single ownership form, it should be returned to NFC with a statement indicating why the bond cannot be delivered. NFC will then forward this information to the Bureau of the Public Debt. A 90–day waiting period is not necessary in this case.

Bond Address Change

Enter a change in inscription to change an address for a savings bond allotment.

Note: Processing an employee address document does not change an address for a savings bond allotment.

This section contains the following topic:

Entering/Change/Cancel Savings Bonds

Entering/Change/Cancel Savings Bonds Data

To add/change/cancel Savings Bonds data:

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

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

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

4. Select the ***Add/Change/Cancel*** button next to Savings Bonds. The Savings Bond Summary page (**Figure 41**) is displayed.

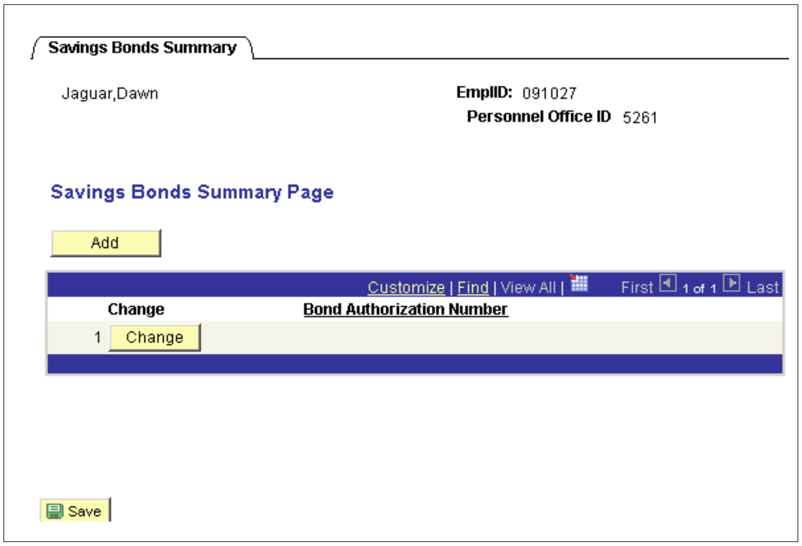


Figure 41. Savings Bonds Summary page

5. Click **Change**. The Bond Information page (**Figure 42**) is displayed.

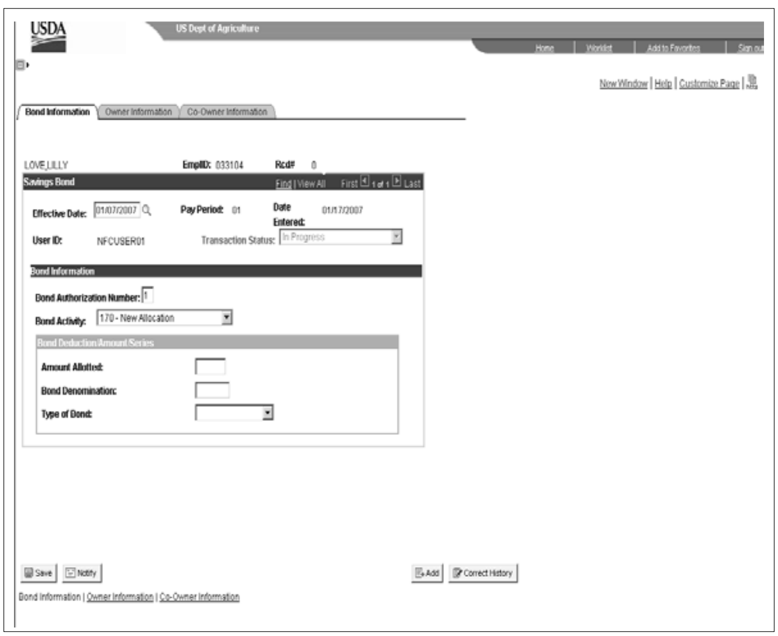


Figure 42. Bond Information page

6. Complete the fields as follows:

Effective Date	This field is populated with the beginning date of the current pay period. This field can be changed. Select data by clicking on the search icon.

User ID — This field is populated when the employee signs on to Employee Self Service.

Transaction Status — The transaction status is based on the status of the transaction. When the transaction is saved, the status will change.

Bond Authorization Number — Enter the bond authorization number (1–9).

Bond Activity — Enter the applicable data or select data from the drop-down list. The valid values are:

Bond Activity Valid Values	Description
170	New Allocattion
171	Change Denom/Allotment
172	Chg Inscription/Denom/Allot
173	Cancel Bond
174	Cancel Owner/Co/Benef

Amount Allocated — Enter the amount allocated to purchase the bond.

Bond Denomination — Enter the denomination of the bond.

Type Of Bond — Enter the type of bond to be issued or select data from drop-down list. The valid values are EE Series Bonds, I Series Bonds.

7. Click **Save** to save the transaction.

8. Select the ***Owner Information*** tab to enter the owner new bond information. The Owner Information page (**Figure 43**)is displayed.

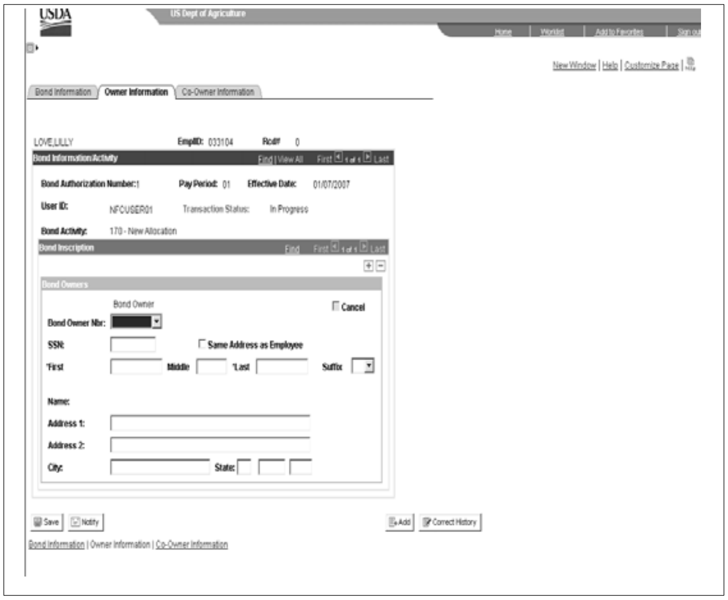


Figure 43. Owner Information page

9. Complete the fields as follows:

Bond Owner Nbr	Enter the applicable information or select data from the drop-down list. The valid values are 1st, 2nd, 3rd, 4th, and 5th.
Cancel	Click this box to cancel the bond.
SSN	Enter the social security number of the bond owner.
Same Address As Employee	Check this box if the address of the bond owner is the same as the employee.
***First**	Enter the first name of the bond owner.
Middle	Enter the middle name of the bond owner if applicable.
***Last**	Enter the last name of the bond owner.
Suffix	Enter the suffix if applicable or select data from the drop-down list. The valid values are:

Suffix Valid Values
I
II

Suffix Valid Values
III
IV
Jr
Sr
V
VI

Address 1 Enter the first line of the bond owner address.

Address 2 Enter the second line of the bond owner address if applicable.

Address 3 Enter the third line of the bond owner address if applicable.

City Enter the city for the address.

State/Postal Code Enter the state and postal code for the bond owner's address.

10. Click **Save** .

11. Click the ***Beneficiary Information*** link at the bottom of the page (**Figure 43**). The Bond Beneficiary Information page (**Figure 44**) is displayed.

OR

Click the ***Beneficiary Information*** tab at the top of the page. The Bond Beneficiary Information page(**Figure 44**)is displayed.

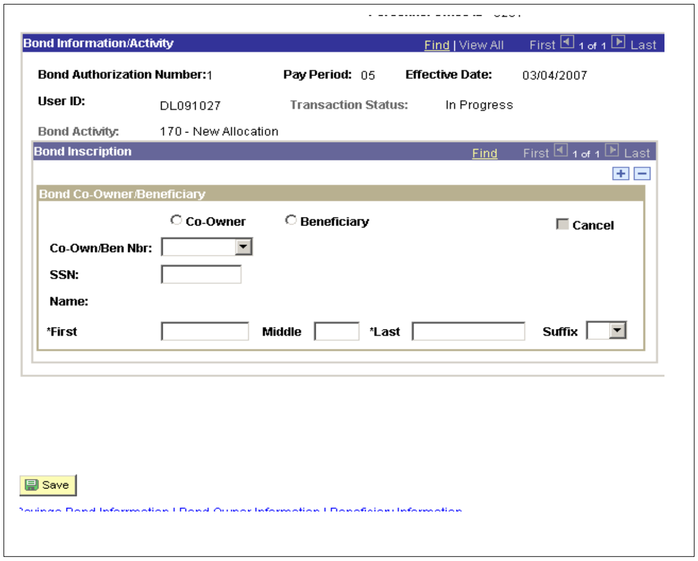


Figure 44. Beneficiary Information page

12. Complete the fields as follows:

Co-Owner	Check this box if the bond has a co-owner.
Beneficiary	Check this box if the bond has a beneficiary.
Cancel	Check this box if the co-owner or beneficiary should be canceled.
Co-Owner Nbr	Enter the applicable information or select data from the drop-down list. The valid values are 1st, 2nd, 3rd, 4th, and 5th.
SSN	Enter the social security number of the co-owner or beneficiary.
***First**	Enter the first name of the co-owner or beneficiary.
Middle	Enter the middle name of the co-owner or beneficiary if applicable.
***Last**	Enter the last name of the co-owner or beneficiary.
Suffix	Enter the suffix for the co-owner or beneficiary or select data from the drop-down list. The valid values are:

Suffix Valid Values
I
II
III
IV
Jr
Sr
V
VI

13. 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 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 IRS 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 IRS 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.

This section contains the following topics:

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.

Cancellation 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 cancellation 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 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 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; 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

This section contains the following topic:

Entering/Change/Cancel 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.
1. Select the ***Add/Change/Cancel*** button next to State Tax. The State Tax tab page (**Figure 45**) is displayed.

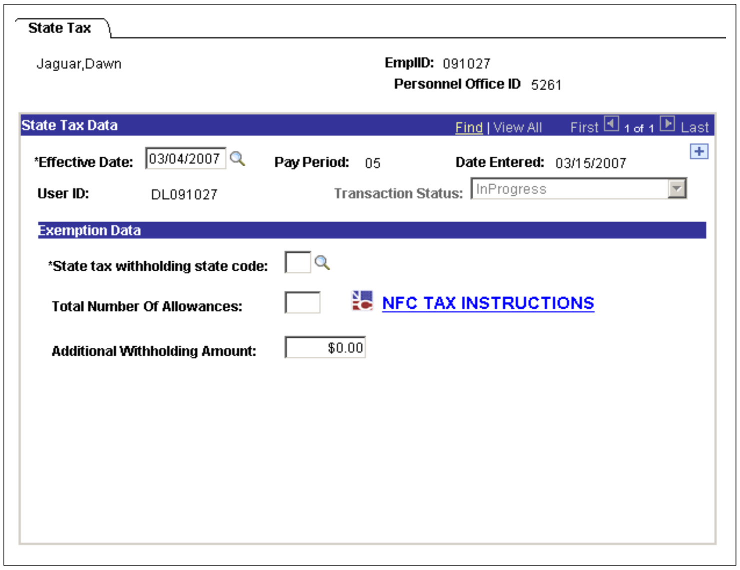


Figure 45. State Tax tab page

2. Complete the fields as follows:

Effective Date	This field is automatically populated with the beginning date of the current pay period. Change the date if applicable.
Date Entered	This date is populated.
User ID	This field is populated when the employee signs on to Employee Self Service.
Transaction Status	This field defaults to In Progress and reflects the status of the transaction. The transaction status will change when the transaction is saved, in SINQ, or resent to NFC.
***State Tax Withholding State Code**	Enter the state tax withholding code or select data by clicking on the search icon.
Total Number Of Allowances	Enter the applicable number.
Additional Withholding Amount	Enter the additional amount to be withheld.

3. Click **Save** .

Thrift Savings Plan

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

FERS employees should refer to the TSP Fact Sheet **`Annual Limit on Elective Deferrals`** dated 11/2/05 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)

- The type of action (enrolling, changing, stopping contributions)
- The percent of Contribution OR the amount of Contribution.
- Whether action is being processed during an Open Season.

This section contains the following topic:

[Entering/Change/Cancel Thrift Savings Plan Data]

Entering/Change/Cancel Thrift Savings Plan Data

To add/change/cancel Thrift Savings Plan data:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Payroll Documents*** component.
4. Select ***Add/Change/Cancel*** button next to Thrift Savings Plan. The Thrift Savings Plan page (**Figure 46**) is displayed.

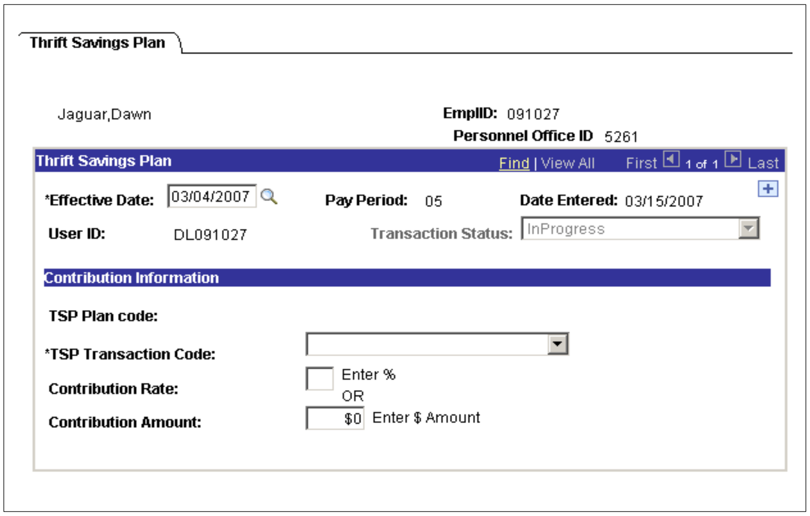


Figure 46. Thrift Savings Plan page

5. Complete the fields as follows:

Effective Date	This field is automatically populated with the beginning date of the current pay period. Change the date if applicable.
Date Entered	This date is populated.
User ID	This field is populated when the employee signs on to Employee Self Service.
Transaction Status	This field defaults to In Progress and reflects the status of the transaction. The transaction status will change when the transaction is saved, in SINQ, or resent to NFC.
***TSP Transaction Code**	Enter the applicable code or select data from the drop-down list. The valid values are Cancel, New, New Enrollment/Change, and Waive.

Contribution Rate	Enter the contribution percent.
OR	
Contribution Amount	Enter the contribution amount ($XX.XX)

6. Click **Save** .

TSP Catchup

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.
- Contributing 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)

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

This section contains the following topic:

Entering/Change/Cancel Thrift Savings Plan Catchup

Entering/Change/Cancel Thrift Savings Plan Catchup Data

To add/change/cancel Thrift Savings Plan Catchup data:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Payroll Documents*** component.
4. Select the ***Add/Change/Cancel*** button next to TSP Catchup. The TSP Catchup page (**Figure 47**) is displayed.

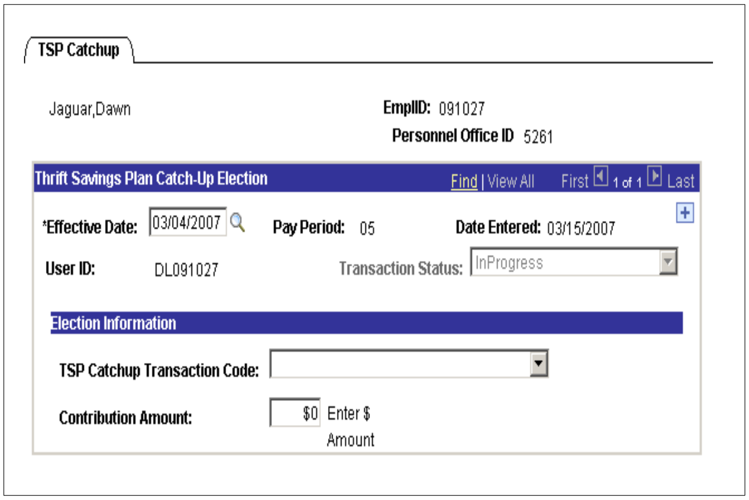


Figure 47. TSP Catchup page

5. Complete the fields as follows:

Effective Date	This field is automatically populated with the beginning date of the current pay period. Change the date if applicable.
Date Entered	This date is populated.
User ID	This field is populated when the employee signs on to Employee Self Service.
Transaction Status	This field defaults to In Progress and reflects the status of the transaction. The transaction status will change when the transaction is saved, in SINQ, or resent to NFC.
TSP Catchup Transaction Code	Enter the applicable code or select data from the drop-down list. The valid values are Cancellation, Change, and New Enrollment.
Contribution Amount	Enter the contribution amount ($XX.XX)

6. Click **Save**.

Awards Request

This option is used by the Government Accounting Office (GAO).

This section contains the following topic:

[Viewing And Updating Award Data]

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 Request*** component. The Find An Existing Value tab - GAO Employee Award Request page (**Figure 50**) is displayed.

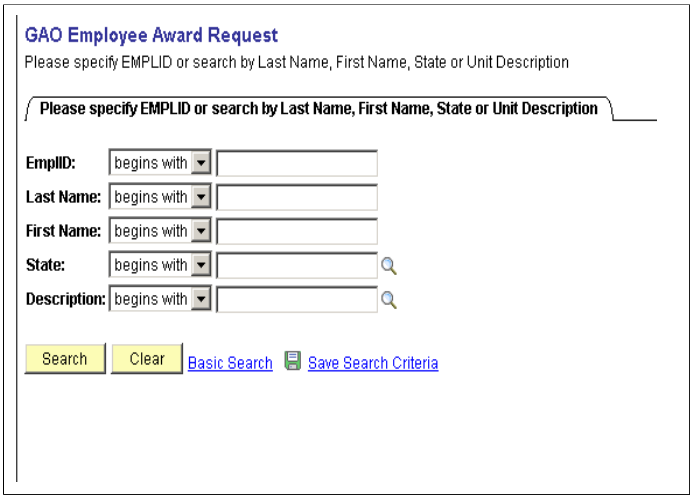


Figure 48. GAO Award Request page

4. Complete the fields as follows:

EmplID	Enter the EmplID.
Last Name	Enter the last name.
First Name	Enter the first name.
State	Enter the state.
Description	Enter the description.

5. Click **Search**. The Award Request For page (**Figure 49**) is displayed.

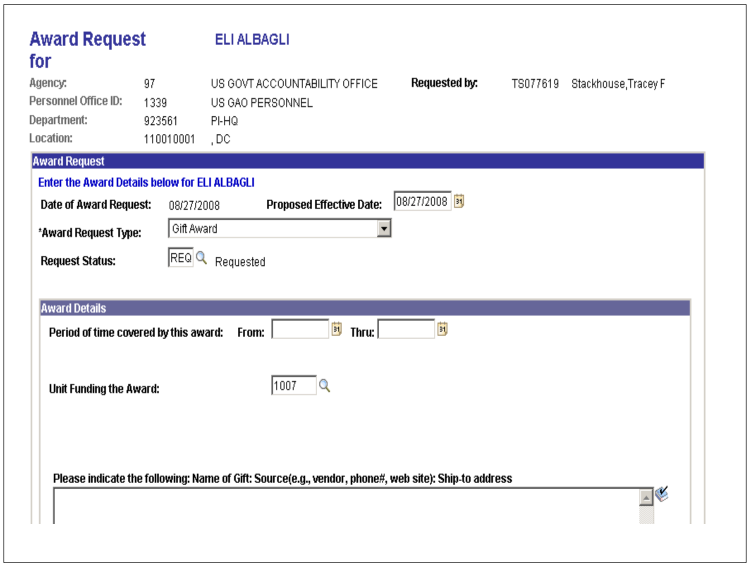


Figure 49. Award Request For page

6. Complete the fields as follows:

Agency	This field is populated with the agency of the employee.
Personnel Office ID	This field is populated with the POI of the employee.
Department	This field is populated with the Department of the employee/POI.
Requested By	This field is populated with the User ID and name.
Location	This field is populated.
Date Of Award Request	This date is the current date or the date of the award request. Enter the date or select a date from the calendar icon.
***Award Request Type**	Enter the award type or select data from the drop-down list. The valid values are:

Award Request Type Valid Values
Cash Award - Performance Based
Gift Award
Group Special Act /Service Award
Travel Award
Spot Cash Award

Award Request Type Valid Values
Time-off Award In Blk 20
Indiv Cash Award - Suggestion
Plaque Award

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.

Unit Funding The Award Enter the unit funding the award or select data by clicking the search icon.

Indicate The Following: Name Of Gift:: Source(e.g. Vendor, Phone#, Web Site): Ship-To Address Enter the specific accomplishments to justify the award.

7. Click **Save** to save the data.

8. Click **Create Printable Award** to print the actual award.

Awards

This process allows employees other than GAO to view and update an award.

This section contains the following topic:

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 Find An Existing Value tab - Awards page (**Figure 50**) is displayed.

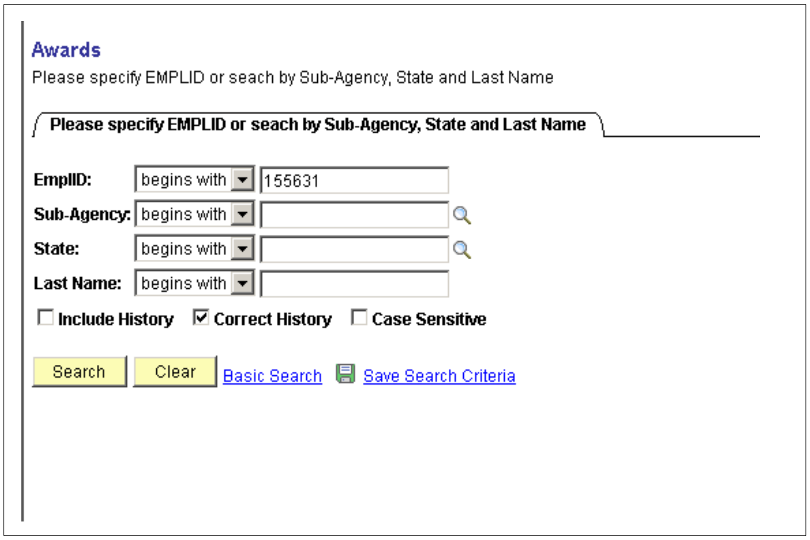


Figure 50. Find An Existing Value tab - Award Request page

4. Complete the fields as follows:

EmplID	Enter the EmplID.
Sub Agency	Enter the sub-agency.
State	Enter the state.
Last Name	Enter the last name

5. Click **Search**. The Award Request For (the selected employee) page (**Figure 49**) is displayed.

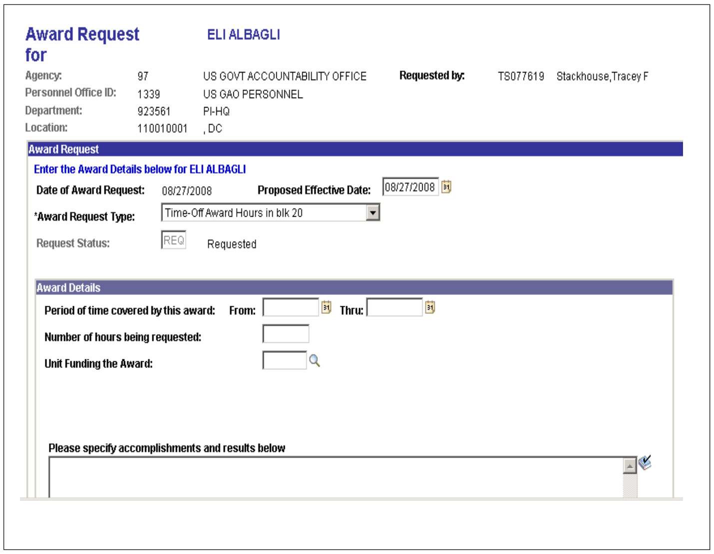


Figure 51. Award Request For page

Agency	This field is populated with the agency of the employee.
Personnel Office ID	This field is populated with the POI of the employee.
Department	This field is populated with the Department of the employee/POI.
Requested By	This field is populated with the User ID and name.
Location	This field is populated with the location number and state.
Date Of Award Request	This date is the current date or the date of the award request. Enter the date or select a date from the calendar icon.
Proposed Effective Date	Enter the proposed effective date of the award or select a date from the calendar icon.
***Award Request Type**	Enter the award type or select data from the drop-down list. The valid values are:

Award Request Type Valid Values
Cash Award - Performance Based
Group Special Act /Service Award
Group Cash Award Suggestion
Time-off Award In Blk 20
Indiv Group Award - Suggestion
Group Time-off Award

Request Status	This field is the status of the award.
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.
Number Of Hours Being Requested	Enter the number of hours.

Unit Funding The Award	Enter the unit or select data by clicking the search icon.
Please Specify Accomplishments And Results Below	Enter the specific accomplishments to justify the award.

6. Click **Save**. The Save pop-up (**Figure 52**) is displayed.

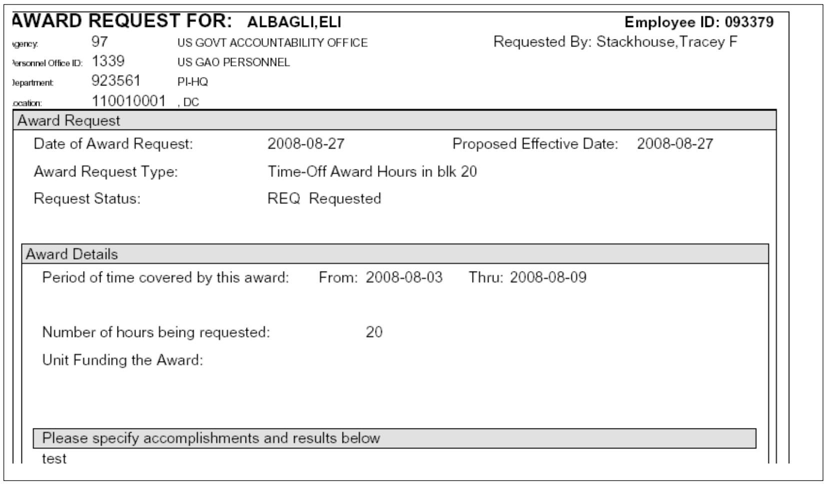
Figure 52. Save pop-up

7. Click **OK**. The Award Request For page (**Figure 51**) is displayed.

8. Click **Create Printable Award** to print the award. The ***View Printable Award*** link (**Figure 53**) is displayed.

Figure 53. View Printable Award link

9. Click the ***View Printable Award*** link. The Award Request For form (**Figure 54**) is displayed.



AWARD REQUEST FOR: ALBAGLI,ELI — Employee ID: 093379

gency: 97 US GOVT ACCOUNTABILITY OFFICE — Requested By: Stackhouse,Tracey F

ersonnel Office ID: 1339 US GAO PERSONNEL

epartment: 923561 PI-HQ

ocation: 110010001 , DC

Award Request

Date of Award Request: 2008-08-27 — Proposed Effective Date: 2008-08-27

Award Request Type: Time-Off Award Hours in blk 20

Request Status: REQ Requested

Award Details

Period of time covered by this award: From: 2008-08-03 Thru: 2008-08-09

Number of hours being requested: 20

Unit Funding the Award:

Please specify accomplishments and results below

test

Figure 54. Award Request For form

10. Click the ***X*** to close the page. The Award Request For page (**Figure 51**) is displayed.

Contact Information

This section includes the following topics:

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 (**Figure 55**) is displayed.

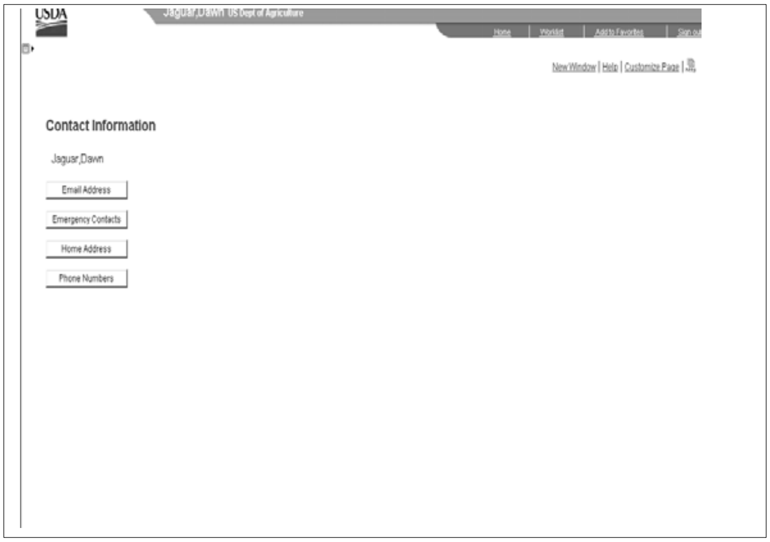


Figure 55. Contact Information page

4. Select ***Email Address***. The Email Addresses page (**Figure 56**) is displayed.

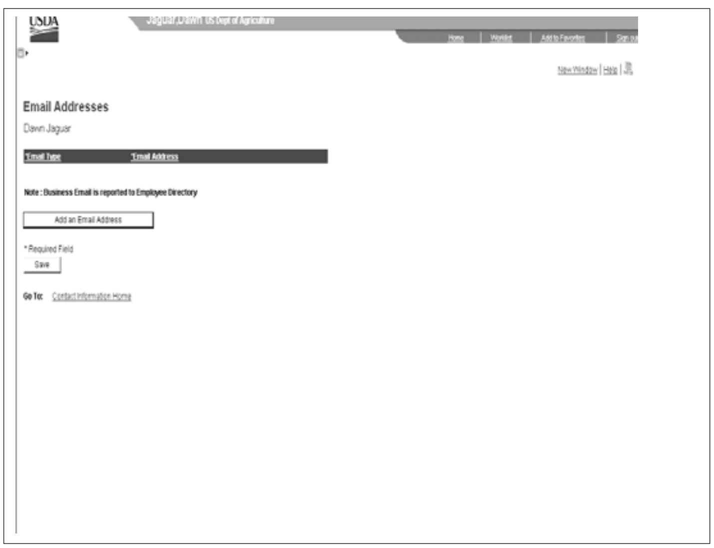


Figure 56. Email Addresses page

5. Click **Add An Email Address**.

6. Complete the fields as follows:

***Email Type**	Enter the type of email address or select data from the drop-down list. The valid values are as follows:

Email Type Valid Values
Blackberry
Business
Campus
Dorm

Email Type Valid Values
Home
Other
Work

***Email Address** Enter the email address.

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

7. Click **Save**.

8. Click **OK**.

9. Click ***Contact Information Home*** link. The Contact Information page (**Figure 55**) 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 (**Figure 55**) is displayed.

4. Select the ***Emergency Contacts*** option. The Emergency Contacts page (**Figure 57**) is displayed.

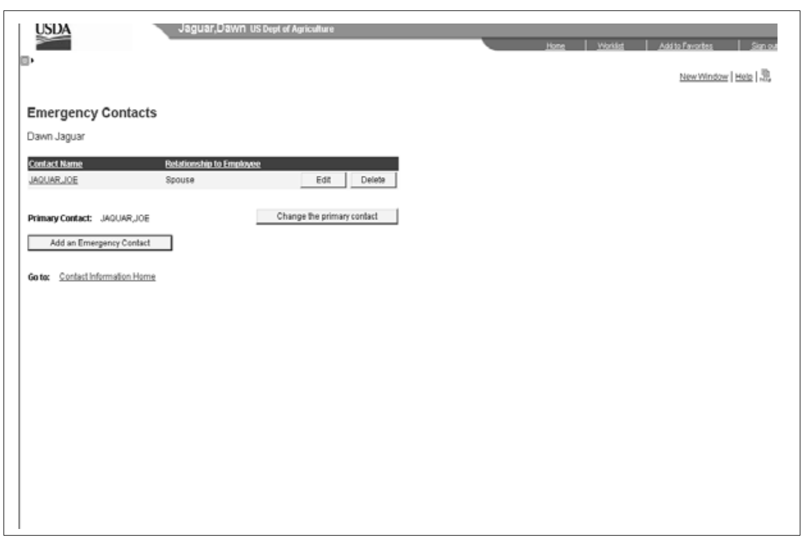


Figure 57. Emergency Contacts page

5. Click **Add An Emergency Contact**.

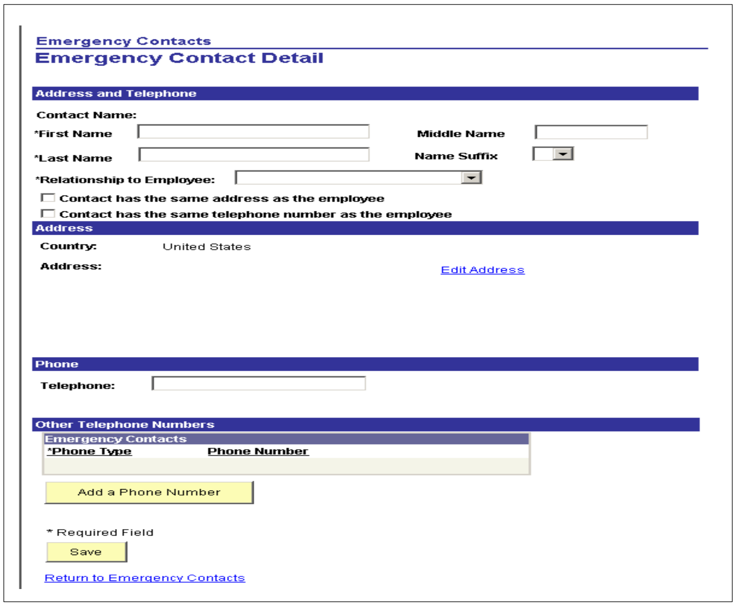


Figure 58. Emergency Contact Detail page

6. Complete the fields as follows:

***First Name**	Enter the first name of the emergency contact.
Middle Name	Enter the middle name if applicable.
***Last Name**	Enter the last name of the emergency contact.
Name Suffix	Enter the suffix for the name if applicable or select data from the drop-down list. The valid values are:

Suffix Valid Values
I
II
IV
Jr
Sr
V
VI

***Relationship To The Employee**	Enter the relationship the contact is to the employee or select data from the drop-down list. The valid values are:

Relationship Valid Values
Adopted Ch
Child < 22

Relationship Valid Values
Child > 22
Foster Ch
Spouse
Stepchild

Contact Has The Same Address	Check this box if the contact has the same address as the employee.
Contact Has The Same Phone Number	Check this box if the contact has the same phone number as the employee.

7. Click **Save**.
8. Click **OK**.
9. Click **Edit** to modify an emergency contact.
10. Click **Delete** to delete an emergency contact.

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 (**Figure 55**) is displayed.
4. Select the ***Home Address***. The Home Address page (**Figure 59**) is displayed.

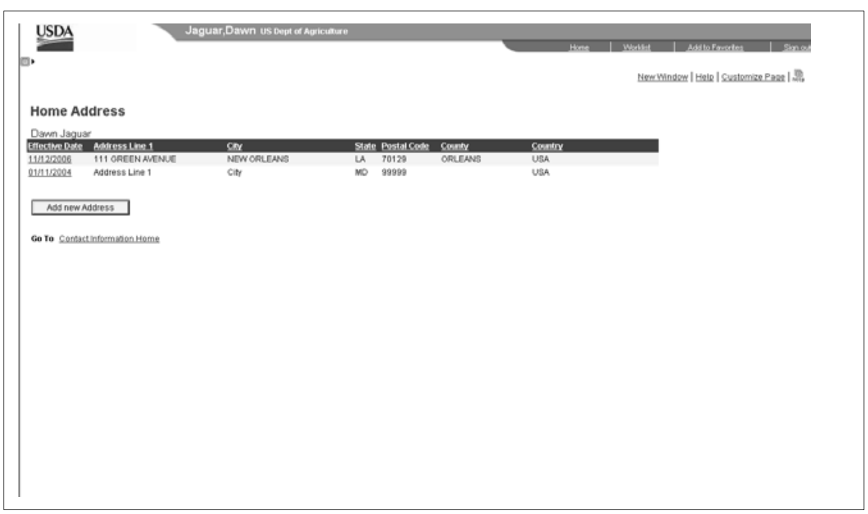


Figure 59. Home Address page

5. Click **Add New Address**.

6. Complete the fields as follows:

***Date Address Is Effective**	Enter the date the address is effective or select a date from the calendar icon.
***Address Line 1**	Enter the address for the home address.
Address Line 2	Enter the 2nd line of the home address if applicable.
Address Line 3	Enter the 3rd line of the home address if applicable.
***City**	Enter the city of the home address.
***State**	Enter the state of the home address.
***Postal Code**	Enter the zip code of the city.
Country	This field defaults to USA. Change by selecting data from the search icon.

7. Click **Save**.

8. Click **OK**.

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 (**Figure 55**) is displayed.

4. Select ***Phone Numbers***. The Phone Numbers page (**Figure 60**) is displayed.

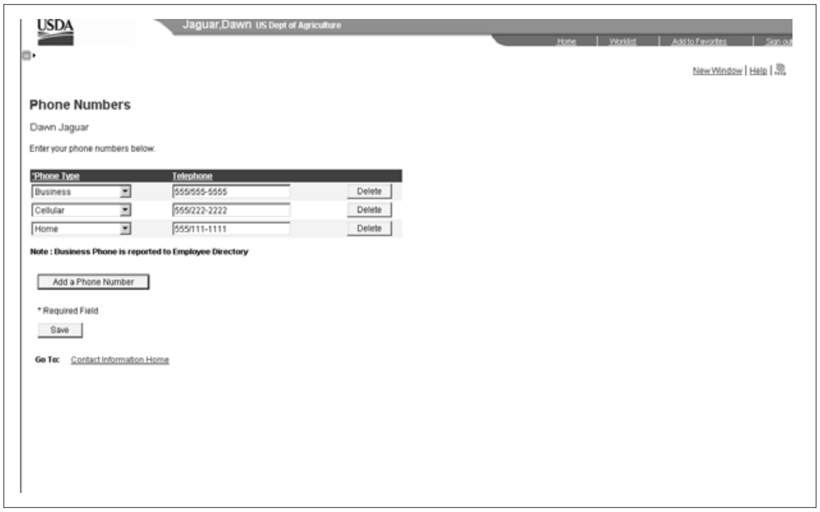


Figure 60. Phone Numbers page

5. Click **Add A Phone Number**.

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

***Phone Number Type** Enter the type of phone number or select data from the drop-down list. The valid values are:

Phone Type Valid Values
Business
Campus
Dormitory
Fax
Flex Ph
Home
Main
Dormitory
Fax
Flex Ph
Home
Main
Mobile
Other
Pager 1
Pager 2
Telex

Telephone Enter the telephone number.

Note: If a phone number is established, click **Delete** to delete the established phone number.

7. Click **Save**.

8. Click **OK**.

Performance

The Employee Self Service (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 is is finalized by their manager.

This section contains the following topics:

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 (**Figure 61**) is displayed.

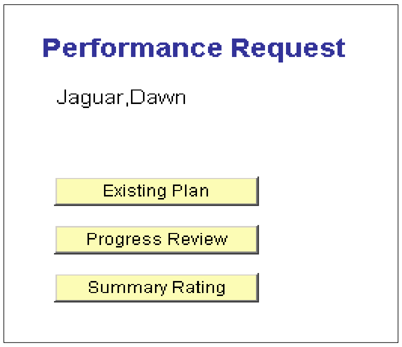


Figure 61. Performance Request page

4. Click **Existing Plan**. The Find An Existing Value tab - Employee Views Plan page (**Figure 62**) is displayed.

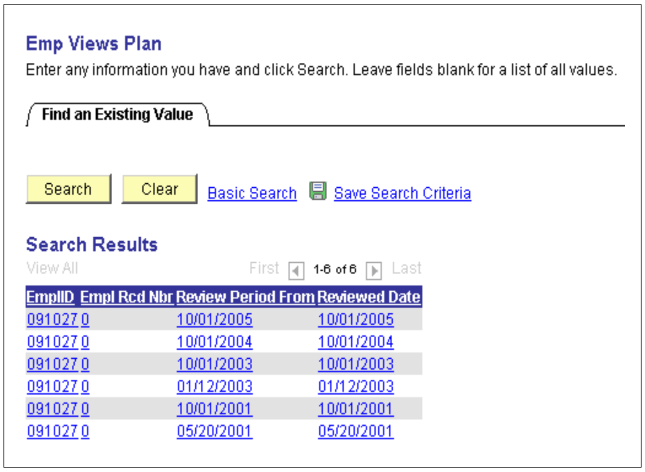


Figure 62. Employee Views Plan page

5. Select a plan from the list.

6. Click **Search**. The Performance Plan tab - Employee Views Plan page (**Figure 63**) for the selected plan is displayed.

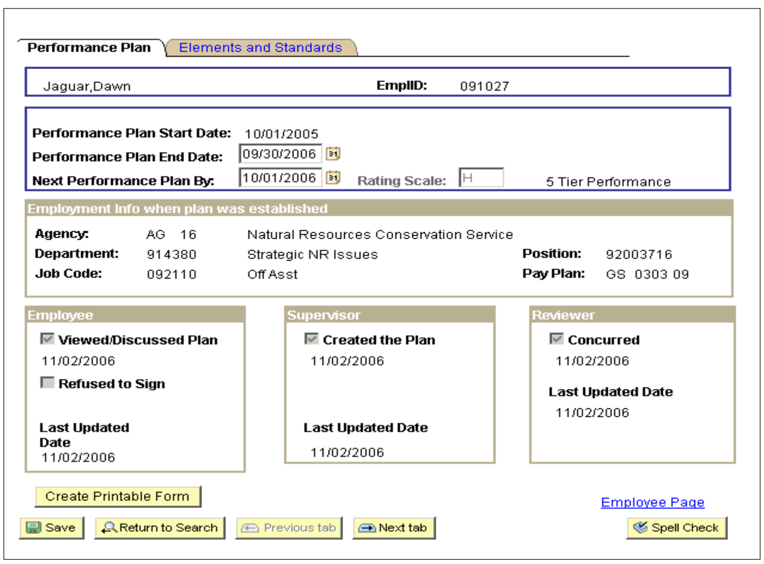


Figure 63. Performance Plan tab - Employee Views Plan page

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

7. Complete the fields as follows:

Performance Plan Start Date	This field is populated from the MSS entry.
Performance Plan End Date	Enter the performance plan end date or select a date from the calendar icon.

Next Performance Plan By	Enter the date indicating when the next plan is due or select a date from the calendar icon.
Rating Scale	This field is populated from the MSS entry.
Agency	This field is populated from the ESS logon.
Department	This field is populated from the ESS logon.
Job Code	This field is populated from the ESS logon.
Position	This field is populated from the ESS logon.
Pay Plan	This field is populated from the ESS logon.
Employee/Viewed Discussed Plan	Check this box when the employee views the plan or discussed with the supervisor. The employee checks this block or the refused to sign block.
Employee Refused To Sign	Check this box when when employee refuses to sign the rating performance plan. The employee checks this box or the viewed discussed plan box.
Last Updated Date	This date is populated after the Viewed Discussed Plan or Refused To Sign box is checked.
Supervisor/Created The Plan	This box is populated from the MSS entry.
Supervisor/Last Updated Date	This date is the date the plan is updated and is populated from the MSS entry.
Reviewed/Concurred	This box is checked and dated by the reviewer of the plan and is populated from the MSS workflow process.
Reviewed/Last Updated Date	This is dated by the reviewer of the plan and is populated from the MSS workflow process.

8. Click **Create Printable Form** to print the Performance Plan.

OR

Click **Save**.

OR

Click **Return To Search** to find another performance plan.

OR

Click **Next Tab** to advance to the Elements and Standards tab- Employee Views Plan page. The Elements and Standards page (**Figure 64**) is displayed.

OR

Click ***Employee Page*** to go back to the Performance Request tab - Employee Views Plan page (**Figure 61**).

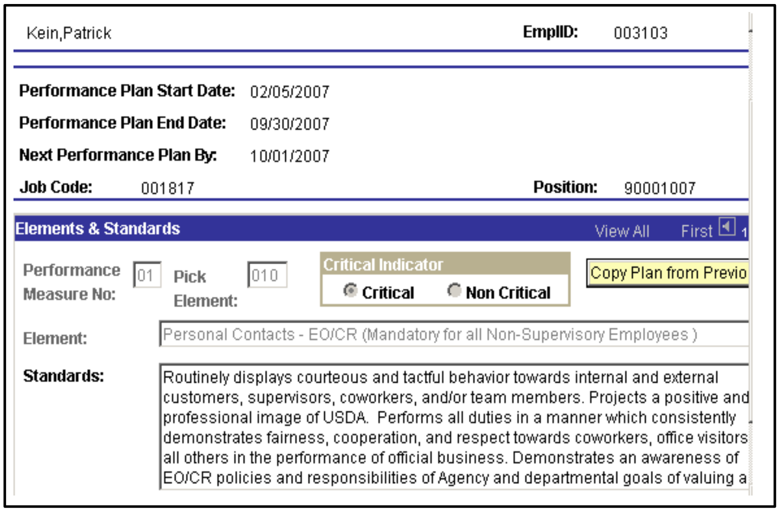


Figure 64. Elements and Standards tab - Employee Views Plan page

9. Complete the field as follows:

Standards	Enter the functional requirement of the standard.

10. Click **Save**.

OR

Click **Notify** to notify a particular person of the change.

OR

Click **Previous Tab** to move to the next tab. The Performance Plan tab - Employee View Plan page (**Figure 63**) is displayed.

OR

Click **Spell Check** to check the spelling of the explanation of the standard.

OR

Click **Copy Plan From Previous** to copy a plan from a previous year.

Performance - Progress Review

The Employee Self Service 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 Find An Existing Value tab - Self Progress Review page (**Figure 65**) is displayed.

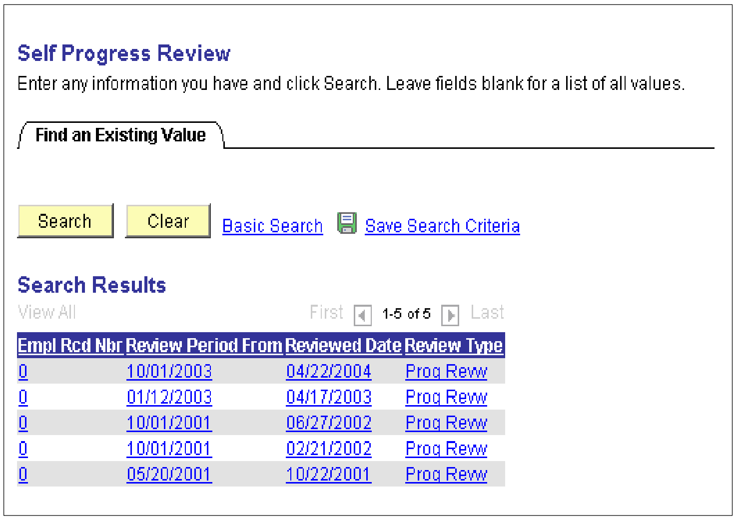


Figure 65. Self Progress Review tab - Self Progress Review page

4. Select a Progress Review.
5. Click **Search**. The Progress Review tab - Self Progress Review page (**Figure 66**) is displayed.

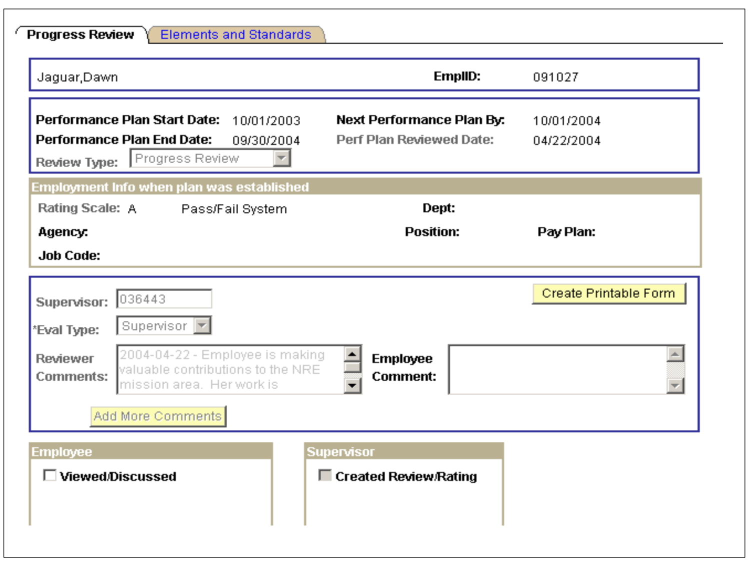


Figure 66. Progress Review page

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

6. Complete the fields as follows:

Performance Plan Start Date	This field is populated from the MSS entry.
Performance Plan End Date	Enter the performance plan end date or select a date from the calendar icon.
Next Performance Plan By	Enter the date the next plan is due or select a date from the calendar icon.
Rating Scale	This field is populated from the MSS entry.
Agency	This field is populated from the ESS logon.
Department	This field is populated from the ESS logon.
Job Code	This field is populated from the ESS logon.
Position	This field is populated from the ESS logon.
Pay Plan	This field is populated from the ESS logon.
Supervisor	This field is populated from the MSS entry.
***Evaluation Type**	This field is populated from the MSS entry.
Employee Comment	Enter the comments for the progress review.
Reviewer Comments	This field is populated from the MSS entry.

Note: Click **Add More Comments** to add additional reviewer or employee comments.

Employee/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.
Supervisor/Reviewed/ Rating	This box is checked if the supervisor created/reviewed the progress review. The current date is populated.

Reviewer/Concurred Rating	This box is checked if the reviewer has reviewed the progress review. The current date is populated.

7. Click **Save**.

8. Click **Return To Search**.

   OR

   Click **Next Tab**. The Elements and Standards tab - Self Progress Review page (**Figure 67**) is displayed.

   OR

   Click ***Employee Page*** to return to the list of progress reviews.

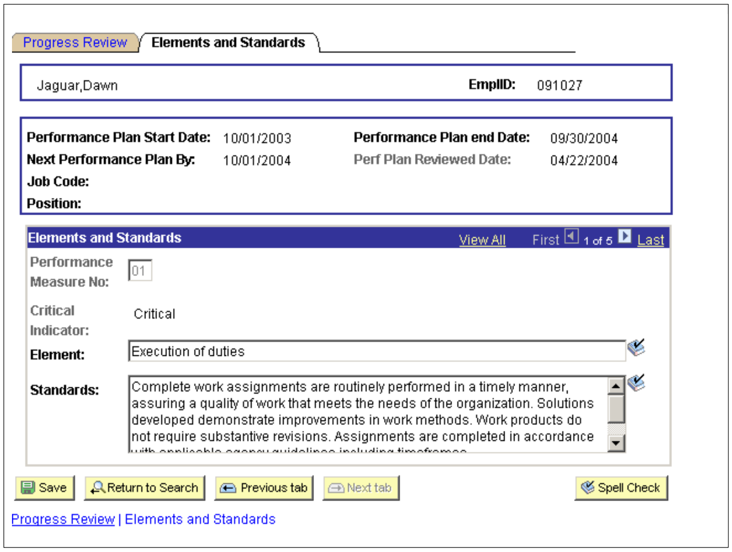


Figure 67. Elements and Standardstab - Self Progress Review page

9. Complete the fields as follows:

Element	This field is populated with information. Change if applicable.
Standards	This field is populated with information. Change if applicable.

10. Click **Save**.

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

12. Click **Return To Search**.

    OR

    Click **Previous Tab**. The Performance Plan tab - Self Progress Review page (**Figure 63**) will display.

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 Find An Existing Value tab - Self Progress Review page (**Figure 68**) is displayed.

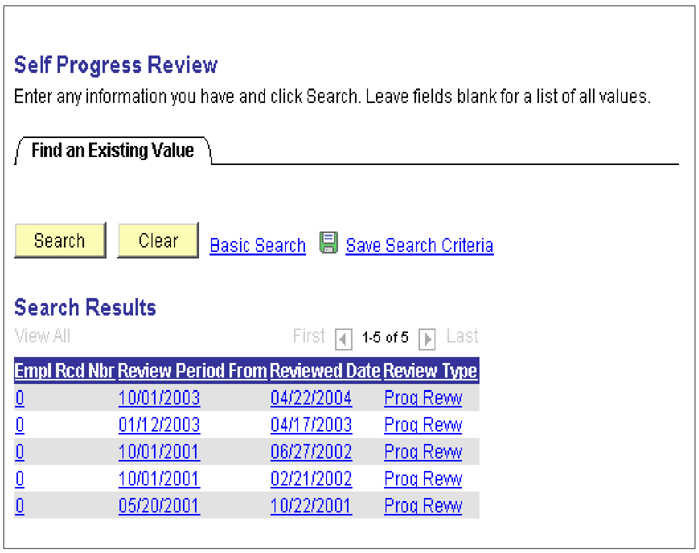


Figure 68. Find An Existing Value tab - Self Progress Review page

4. Select a Summary Rating.

5. Click **Search**. The Summary Rating page (**Figure 69**) is displayed.

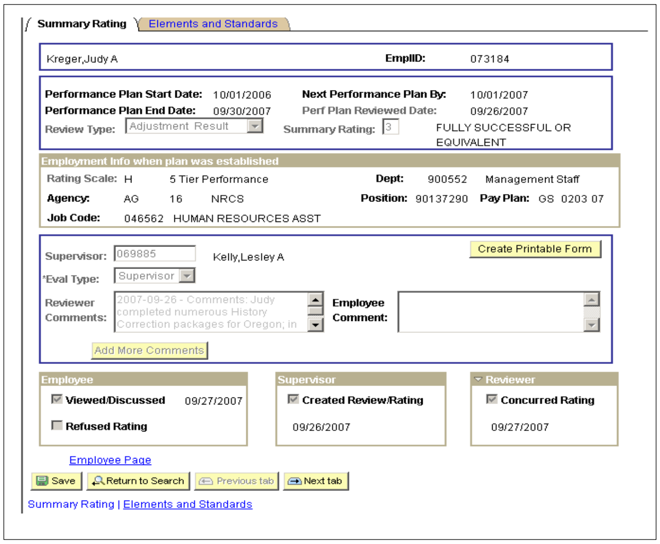


Figure 69. Summary Rating page

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:

Performance Plan Start Date	This field is populated from the MSS entry.
Performance Plan End Date	Enter the performance plan end date or select a date from the calendar icon.
Next Performance Plan By	Enter the date the next plan is due or select a date from the calendar icon.
Rating Scale	This field is populated from the MSS entry.
Agency	This field is populated from the ESS logon.
Department	This field is populated from the ESS logon.
Job Code	This field is populated from the ESS logon.
Position	This field is populated from the ESS logon.
Pay Plan	This field is populated from the ESS logon.

Supervisor	This field is populated from the MSS entry.
***Evaluation Type**	This field is populated from the MSS entry.
Employee Comment	Enter the comments for the progress review.
Reviewer Comments	This field is populated from the MSS entry.

Note: Click **Add More Comments** to add additional reviewer or employee comments.

Employee	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.
Supervisor/Created Review/Rating	This box is checked if the supervisor created/reviewed the summary rating. The current date is populated.

7. Click **Save**.

ESS - View

This section contains the following topics:

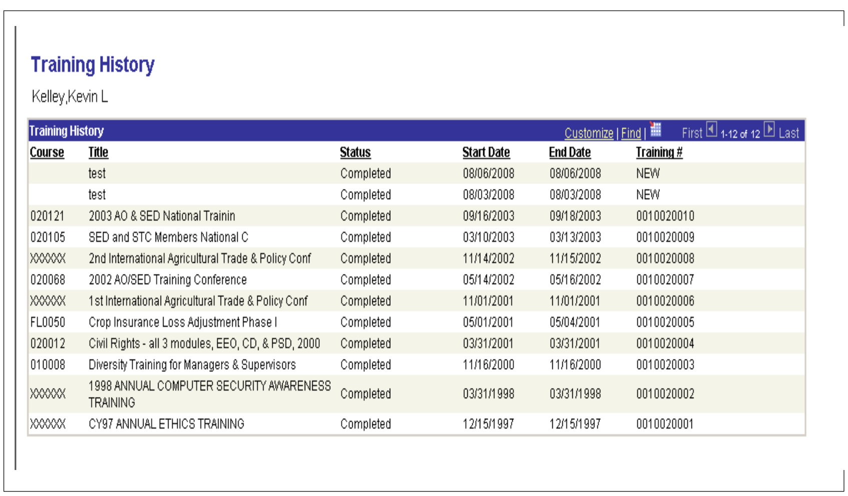
Training Summary

In this section contains the following topic.

Viewing Training Summary Data

To enter 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 (**Figure 70**) is displayed. This page displays training taken by the user.



Training History

Kelley,Kevin L

Training History — Customize | Find | First 1-12 of 12 Last

Course	Title	Status	Start Date	End Date	Training #
	test	Completed	08/06/2008	08/06/2008	NEW
	test	Completed	08/03/2008	08/03/2008	NEW
020121	2003 AO & SED National Trainin	Completed	09/16/2003	09/18/2003	0010020010
020105	SED and STC Members National C	Completed	03/10/2003	03/13/2003	0010020009
XXXXXX	2nd International Agricultural Trade & Policy Conf	Completed	11/14/2002	11/15/2002	0010020008
020068	2002 AO/SED Training Conference	Completed	05/14/2002	05/16/2002	0010020007
XXXXXX	1st International Agricultural Trade & Policy Conf	Completed	11/01/2001	11/01/2001	0010020006
FL0050	Crop Insurance Loss Adjustment Phase I	Completed	05/01/2001	05/04/2001	0010020005
020012	Civil Rights - all 3 modules, EEO, CD, & PSD, 2000	Completed	03/31/2001	03/31/2001	0010020004
010008	Diversity Training for Managers & Supervisors	Completed	11/16/2000	11/16/2000	0010020003
XXXXXX	1998 ANNUAL COMPUTER SECURITY AWARENESS TRAINING	Completed	03/31/1998	03/31/1998	0010020002
XXXXXX	CY97 ANNUAL ETHICS TRAINING	Completed	12/15/1997	12/15/1997	0010020001

Figure 70. Training History page

Award Tracking

This section contains the following topic:

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 Find An Existing Value tab - Award Tracking page (**Figure 71**) is displayed.

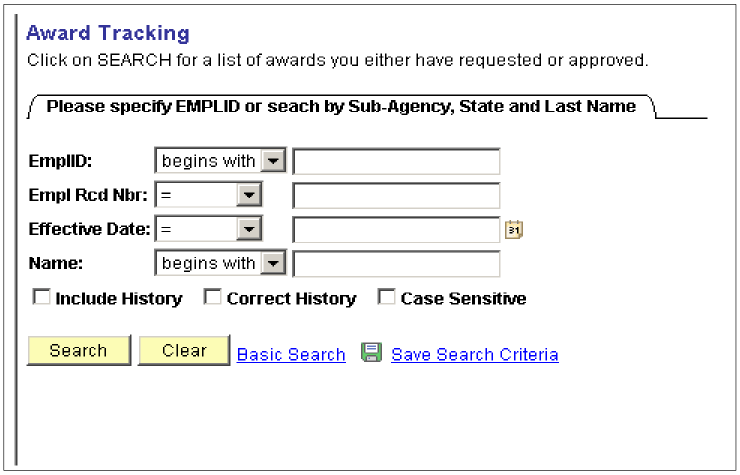


Figure 71. Find An Existing Value - Award Tracking page

4. Complete the fields as follows:

EmplID	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.
Include History	Check this box if applicable.
Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

5. Click **Search**. The Award Request For (the selected employee) page (**Figure 49**) is displayed.

6. Click **View All** to view a second page, if applicable.

Job Information

In this section contains the following topic:

[Viewing Job Information]

Viewing Job Information

To view Job Information:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***View*** from the Employee Self Service drop-down menu.
3. Select the ***Job Information*** from the Tasks drop-down menu. The Employee Job Information page (**Figure 72**) is displayed.

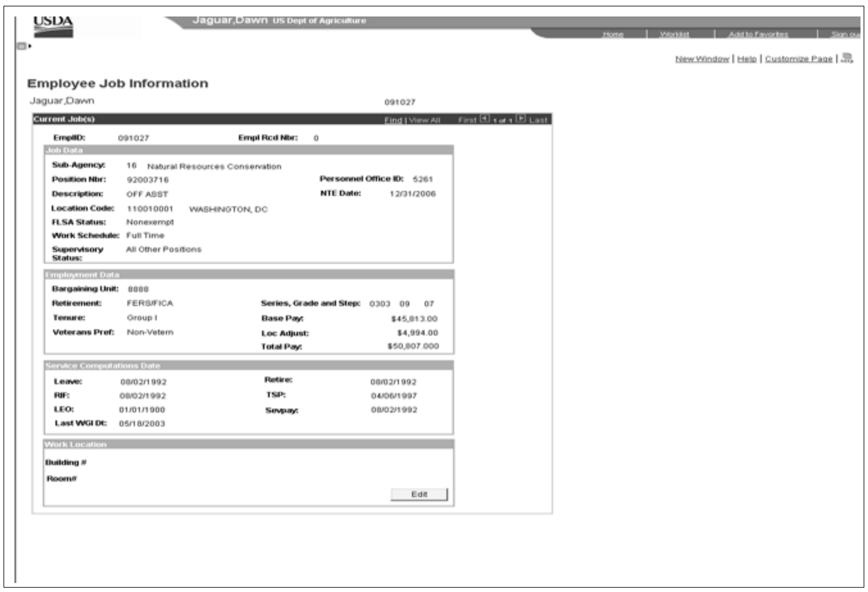


Figure 72. Employee Job Information page

4. Click **View All** to view a second page, if applicable.
5. Click ***Home***.

Personal Information

This section contains the following topic:

[Viewing Personal Information]

Viewing Personal Information

To view Personal Information:

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

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

3. Select the ***Personal Information*** component. The Personal Information page (**Figure 73**) is displayed.

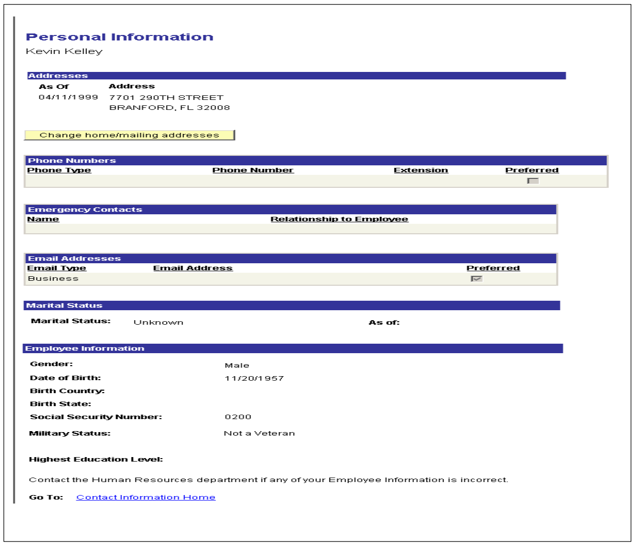


Figure 73. Personal Information page

4. Click **Change Home/Mailing Address**. The Home Address page (**Figure 74**) is displayed.

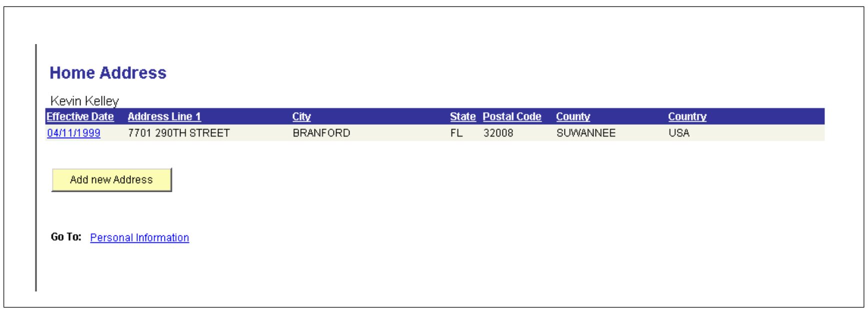


Figure 74. Home Address page

5. Click **Add New Address**. the Home Address Detail page (**Figure 75**) is displayed.

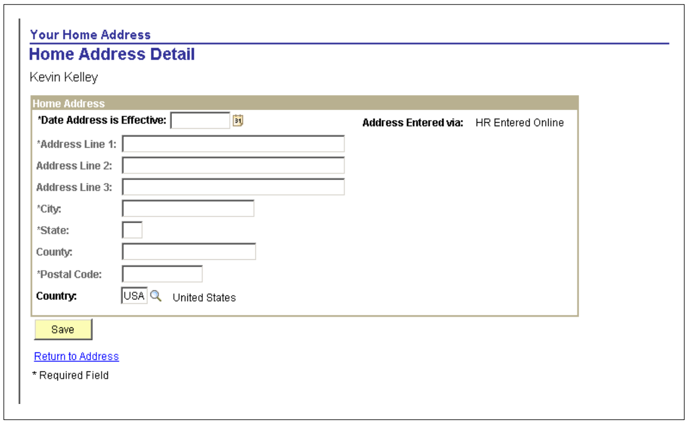


Figure 75. Home Address Detail page

6. Complete the fields as follows:

Name	This field is populated with the users name.
Date Address Is Effective	Enter the date the address is effective or select a date from the calendar icon.
Address Entered Via	This field is populated with the method of entry.
***Address1**	Enter the first line of the address.
Address 2	Enter the 2nd line of the address if applicable.
Address 3	Enter the 3rd line of the address if applicable.
City	Enter the City.
State	Enter the State.
County	Enter the County.
Postal Code	Enter the postal code for the city.
Country	This field defaults to USA. To change, select data by clicking the search icon.

7. Click **Save.**

8. Click the ***Return To Address*** link. The Home Address page (**Figure 74**) is displayed.

9. Click the ***Personal Information*** link. The Personal Information page (**Figure 73**) is displayed.

10. Click the ***Contact Information Home*** link. The Contact Information age (**Figure 76**) is displayed.

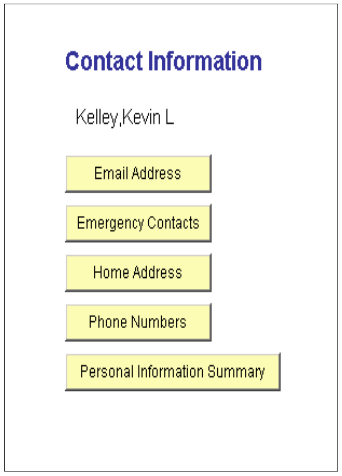


Figure 76. Contact Information page

11. Select ***Email Addresses*** from the Contact Information page (**Figure 76**). The Email Addresses page (**Figure 77**) is displayed.

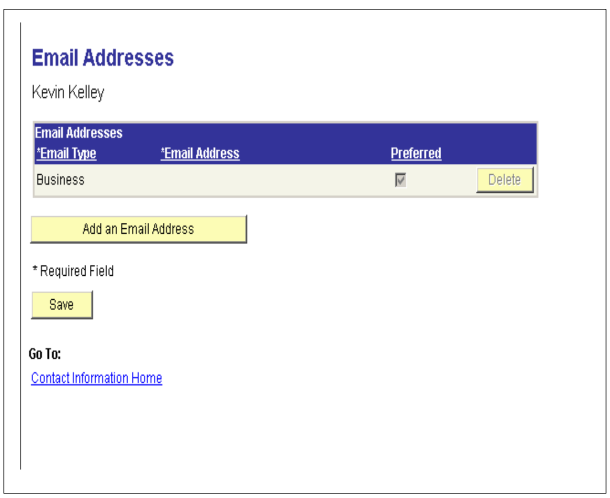


Figure 77. Email Addresses page

12. Click ***Add An Email Address*** to activate the open fields for new data.

13. Complete the fields as follows:

Preferred	Check the box next to the email type that is preferred.

14. Click **Add An Email Address** to add an additional email address. The Email Addresses page (**Figure 78**) is displayed.

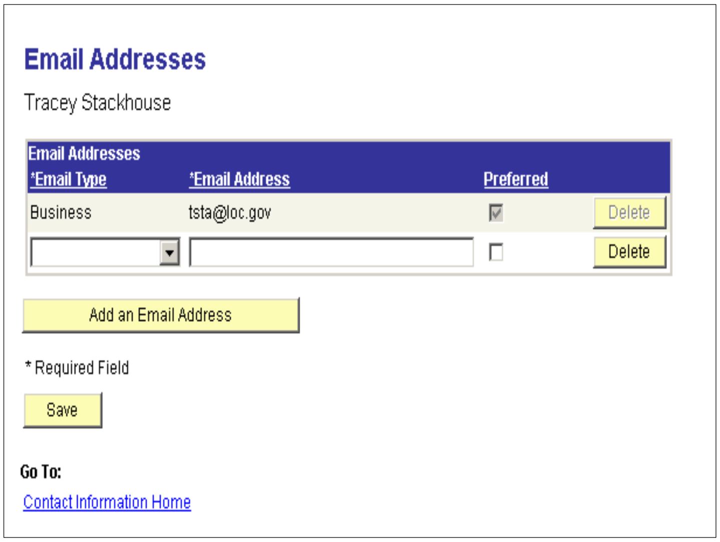


Figure 78. Email Addresses page

15. Complete the fields as follows:

***Email Type** Enter the type of email address or select data from the drop-down list. The valid values are as follows:

Email Type Valid Values
Blackberry
Business
Campus
Dorm
Home
Other
Work

***Email Address** Enter the email address that corresponds with the email type.

Preferred Check the box next to the email type that is preferred.

16. Click **Save** to save the information. The Email Addresses Save Confirmation page (**Figure 79**) is displayed.

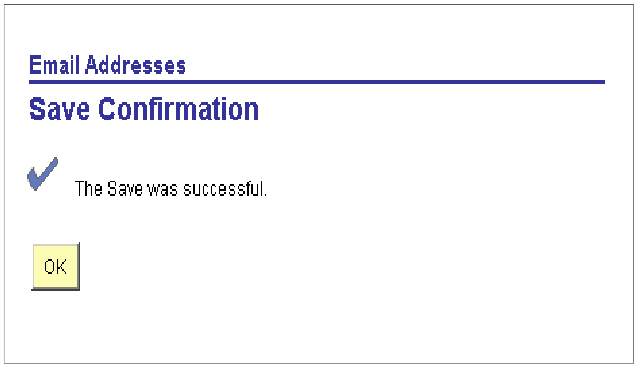


Figure 79. Email Addresses Save Confirmation page

17. Click **OK**. The Email Address page (**Figure 78**) is displayed.

18. Click **Delete** to delete an email address. The Email Addresses Delete Confirmation page (**Figure 80**) is displayed.

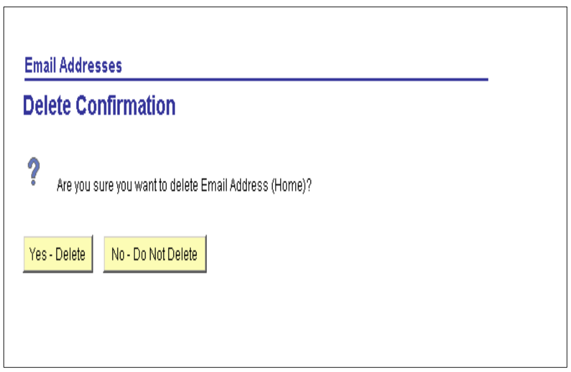


Figure 80. Email Addresses Delete Confirmation page

19. Click **Yes-Delete** to delete the email address. The Email Addresses page (**Figure 78**) is displayed.

    OR

    Click **No-Do Not Delete**. The Email Addresses page (**Figure 78**) is displayed.

20. Click ***Contact Information Home*** link. The Contact Information page (**Figure 76**) is displayed.

21. Select ***Emergency Contacts*** from the Contact Information page (**Figure 76**). The Emergency Contact page (**Figure 81**) is displayed.

Figure 81. Emergency Contacts page

22. Click ***Add An Emergency Contact***. The Emergency Contacts Emergency Contact Detail page (**Figure 82**) is displayed.

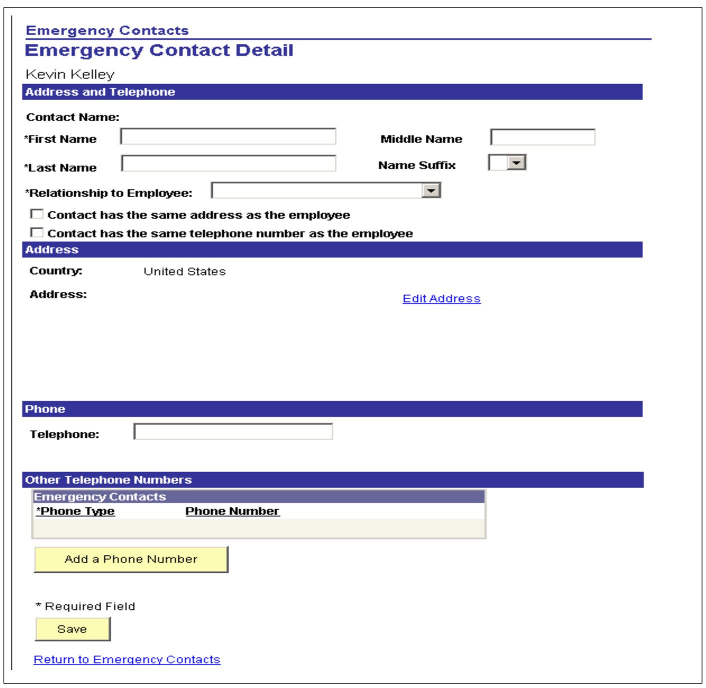


Figure 82. Emergency Contacts Emergency Contact Detail page

23. Complete the fields as follows:

Name	This field is populated with the name of the user.
***First Name**	Enter the contacts first name.
Middle Name	Enter the middle name if applicable.
***Last Name**	Enter the contacts last name.

Suffix

Enter the suffix or select data from the drop-down list. The valid values are as follows:

Suffix Valid Values
I
II
III
IV
Jr
Sr
V
VI

***Relationship To Employee**

Enter the relationship to the employee or select data from the drop-down list. The valid values are as follows:

Relationship To Employee Valid Values
Brother
Child
Daughter
Domestic Partner Adult
Domestic Partner Child
EDomestic Partner
Ex Spouse
Farther
Foster Child
Grand Parent
Grand Father
Mother
Neighbor
Other
Other Relative
Parent
Parent-in-law
Recognized Child
Self
Sibling
Spouse
Stepchild

Contact Has The Same Address As The Employee

Check the box if applicable.

Contact Has The Same Telephone Number As The Employee	Check the box if applicable.
Address/Country	This field defaults to United States.
Address	This field is populated once the address is entered.
Telephone	Enter the telephone number.
Other Telephone Numbers/Emergency ContactsPhone Number	This field is populated once the telephone number is entered.

24. Click ***Add A Phone Number*** to activate fields to edit or enter new data. The Emergency Contacts page (**Figure 83**) expands to add or edit phone number information.

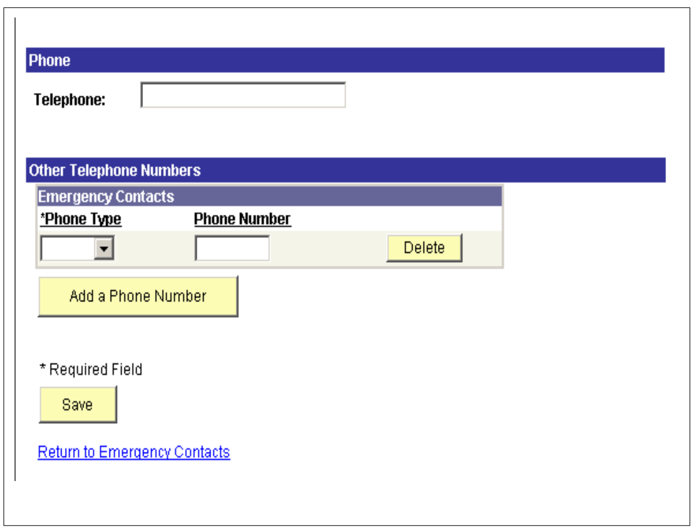


Figure 83. Emergency Contacts expanded page

25. Complete the fields as follows:

Other Telephone Numbers/Emergency Contacts*Phone Type	This field is populated once the telephone type is entered. or select data from the drop-down list. The valid values are as follows:

Phone Type Valid Values
Business
Campus
Dormitory
Home

Phone Type Valid Values
Other
Fax
Flexiplace
Main
Mobile
Pager 1
Pager 2
Telex
Neighbor

Other Telephone Numbers/Emergency Contacts*Phone Number — Enter the telephone number that corresponds with the phone type.

26. Click **Save** to save the information.

27. Click the ***Edit Address*** link. The Edit Address page (**Figure 84**) is displayed.

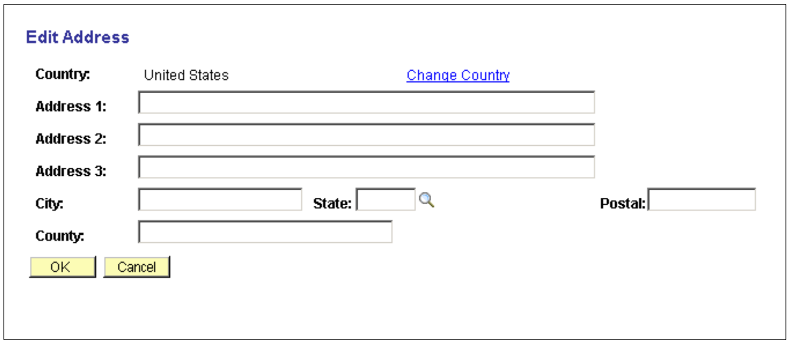


Figure 84. Edit Address page

28. Complete the fields as follows:

Country — This field defaults to United States. To change, click ***Edit Country*** search options are displayed. Select a country and the field will populate with the selected country.

Address 1 — Enter the 1st line of the address.

Address 2 — Enter the 2nd line of the address if applicable.

Address 3 — Enter the 3rd line of the address if applicable.

City — Enter the city.

State — Enter the state or select data by clicking the search icon.

Postal	Enter the zip code for the city.
County	Enter the county.

29. Click **OK** to save the information. The Emergency Contacts Detail page (**Figure 82**) is displayed.

OR

Click **Cancel** to cancel the action. The Emergency Contacts Detail page (**Figure 82**) is displayed.

30. Select ***Phone Numbers*** from the Contact Information page (**Figure 76**). The Phone Numbers page (**Figure 85**) is displayed.

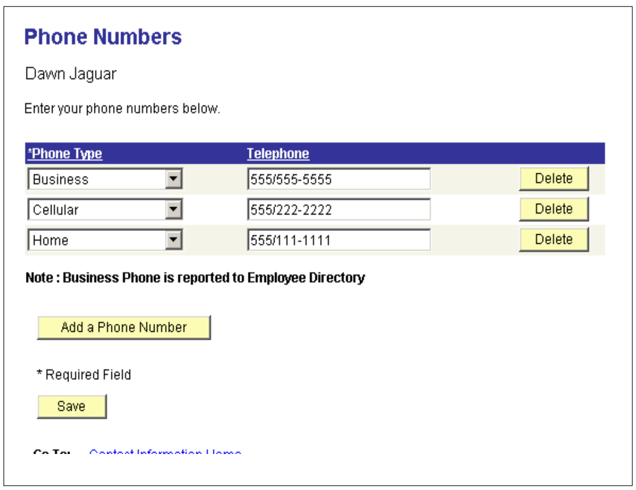


Figure 85. Phone Numbers page

31. Click ***Add A Phone Number*** to activate the open fields for new data.

32. Complete the fields as follows:

***Phone Type**	Enter the phone type or select data from the drop-down list. The valid values are Business, Cellular, and Home.
Telephone	Enter the telephone number that corresponds with the phone type.

33. Select the ***Personal Information Summary*** from the Contact Information page (**Figure 76**).The Personal Information page (**Figure 86**) is displayed.

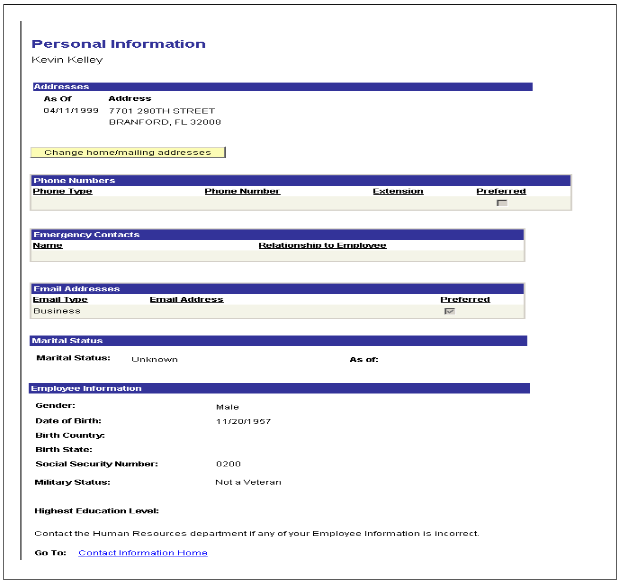


Figure 86. Personal Information page

Note: For more information on the Personal Information page, refer to the Personal Information section of this procedure.

Personnel Actions

The employee can view or print your SF–50, Notification of Personnel Action.

This section contains the following topic:

Viewing/Printing Personnel Actions

Viewing/Printing Personnel Actions

To view/print Personnel Actions:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***View*** from the Employee Self Service drop-down menu.
3. Select the ***Personnel Actions*** from the Tasks drop-down menu. The Personnel Actions page (**Figure 87**) is displayed.

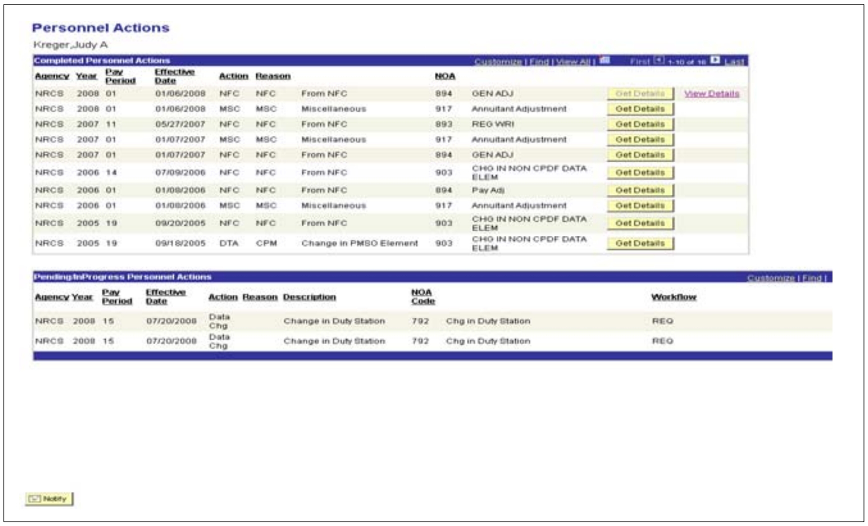


Figure 87. Personnel Actions page

4. Click **Get Details** to activate the ***View Details*** link.
5. Click the **View Details** link to view or print the selected personnel action. This process involves Adobe Acrobat Reader; therefore, there may be a delay before the SF50's are displayed.
6. Click ***Notify*** to notify a person in the workflow.

Personnel Award Actions

This section contains the following topic:

[Viewing Personnel Award Actions](#)

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 (**Figure 88**) is displayed.

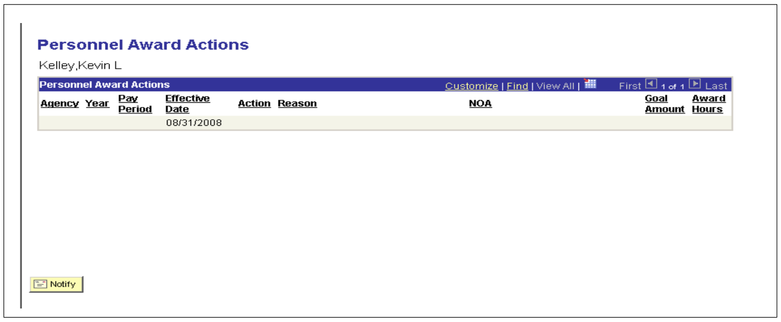


Figure 88. Personnel Award Actions page

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

Position Description

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

This section contains the following topic:

[Viewing Position Descriptions]

Viewing Position Descriptions

To view a Position Description:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***View*** menu.
3. Select the ***Position Descriptions*** component. The Position Description page (**Figure 89**) is displayed.

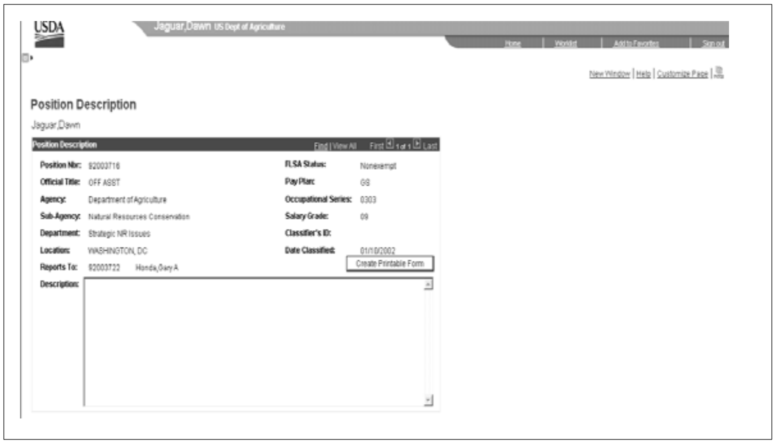


Figure 89. Position Description page

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

5. Click **View Details**. This will bring up a position description. View or print the position description.

Worklist

When an Employee/Manager accesses EmpowHR, the worklist provides an instant view of the status of requested items. EmpowHR Self Service actions requiring approval will appear on the worklist. The worklist provides the Employee/Manager the up-to-date information concerning requests. Employees/Managers can click on any item to either view or make corrections.

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

This section contains the following topic:

Viewing Worklist Data

To view Worklist data:

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

   OR

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

2. Click the applicable item under `link`. The Job Classification Request page (**Figure 90**) is displayed.

Figure 90. Job Classification Request page

3. Click ***Home***.

Heading Index

This index provides an alphabetical list of all headings in the procedure. When a heading is referenced, you can use this index to locate the page number.

A

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