



CrossPointe.net Employee Portal

User Guide

For Employees

May 2012
v 1.0

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Every effort has been made to ensure that this documentation is complete and accurate. However, note that the programs may have changed slightly between the time the manual was printed and the product was released. These changes will not in any way interfere with your use of the product.

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Overview

The CrossPointe.net Employee Portal provides direct, secure access to essential information so that employees can stay informed.

Key features of the Employee Portal include:

- Secure, password-protected access to employee information via the Internet.
- Direct access to payroll history, reimbursements and qualifications.
- Immediate access to W2 Forms.
- Information regarding employee’s time and attendance through the last payroll run.
- On-line check simulator.

What’s Inside

This user guide provides all the instructions employees need to manage their information. Instructions for performing different Portal tasks, such as login, forgot password and checking payroll and benefits, are included.

The screenshot shows the employee portal interface for John Smith. At the top left is the logo for 'education solutions development, Inc.' with the letters 'e', 's', and 'd' in a blue square. The header area displays 'SAR CNTY SCHL BRD' and the date 'Today: 05/16/2012' with a 'Logout' link. Below the header, the employee's name 'John Smith' and ID '12345' are shown. A left-hand navigation menu includes links for 'TIME & ATTENDANCE', 'PAYROLL', 'REIMBURSEMENTS', 'JOBS & BENEFITS', 'PROFILE', 'QUALIFICATIONS', 'DOCUMENTS', and 'LOGOUT'. The 'JOBS & BENEFITS' section is expanded to show 'Current Positions' and 'Benefits & Deductions'. The 'Benefits & Deductions' section contains a table with the following data:

| DESCRIPTION | PRE-TAX | DEDUCTION | BENEFIT |
|--------------------------------|---------|-----------|----------|
| BENCOR | Yes | Computed | 0.00 |
| Federal Income Tax | No | Computed | 0.00 |
| Medicare | No | Computed | Computed |
| WORKMENS COMPENSATION INSURANC | No | 0.00 | Computed |

Below the table, there is an 'INFORMATION' section with the text: 'Double-check your benefits and deductions and report issue to the admin.'

Starting the Portal

Use this procedure to start the Employee Portal.

Before You Begin

Do the following:

- Start your Internet browser.
- Be sure you know your User ID and PIN.

Procedure

Do the following to start the Employee Portal:

1. Display the webpage for your school, and click the Employee Portal link.

The following screen is displayed.

The screenshot shows the Employee Portal login interface. At the top left is the 'esd' logo for 'education solutions development, Inc.'. To the right are links for 'DEDUCTIONS', 'ATTENDANCE', 'BENEFITS', and 'TIMESHEETS'. The main area contains a login form with the following fields: 'User ID', 'PIN', and 'Institution' (with 'SAR CNTY SCHL BRD' selected). A 'Sign-in' button is positioned below the form. To the right of the form is a 'User assistance:' section with a 'Forgot Password' link.

2. Enter your User ID and PIN, then click the Sign-In button.

Navigating the Portal

Before you can access your employee information using the Portal, the district will need to setup your information.



Before You Begin

Start the Employee Portal. Refer to **Starting the Portal** if needed.

Procedure

What information do you need to display?

| Menu | Options |
|-------------------|---|
| Time & Attendance | <p>Attendance Displays a calendar view of employee's attendance for the selected year, with a summary of the days earned, used, requested, and the remaining balance for each absence category.</p> <p>Time Worked Displays the employee's processed timesheets based on the selected year.</p> |

Continue..

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| | |
|-----------------|---|
| Payroll | <p>Paycheck History Displays the employee's check(s) paid in the selected year. Once a check is selected, the user can print the selected check details.</p> <p>Withholdings (W4) Displays the employee's Federal and State tax filing information.</p> <p>Direct Deposit Displays employee's bank routing information.</p> <p>Check Simulation Displays employee's checks paid for the current year. Once a check is selected, the user can adjust different payroll fields such as filing status, deduction amounts, allowances, etc. The user can then calculate the projected salary based on these adjustments.</p> <p>W2 Forms Displays a PDF copy of the Employee's W2 Forms.</p> |
| Reimbursements | <p>Reimbursements Displays employee's reimbursement details based on the selected year.</p> |
| Jobs & Benefits | <p>Current Positions Displays information of the employee's jobs for the current fiscal year.</p> <p>Benefits & Deductions Displays employee's Statutory Deduction and Benefits information.</p> |

Continue..

| | |
|----------------|--|
| Profile | <p>Addr/Phone/Email Displays employee mailing address and contact information.</p> <p>Reset Pin Allows the employee to change their login PIN. The changed PIN will take effect upon the next login.</p> |
| Qualifications | <p>Certifications Displays the list of certificates acquired by the employee.</p> <p>Education Displays employee's educational background.</p> |
| Documents | Displays a list of common documents. |

Logging Off the Portal

Use this procedure to end your session and log off the Portal.

Before You Begin

If you have updated any information, be sure you save your entries.

Procedure

Do the following to end your session and log off the Portal:

1. Click **Logout**, which appears in the top right of the screen.
The Portal ends your session and redisplay the Sign-In dialog box.
2. It is recommended that you also close your Internet browser for security reasons.

Forgot Your Password?

If you forget your password, you can request a new one and then change it as needed.

Before You Begin

Do the following:

- Start your Internet browser.
- Be sure you know your correct Employee SSN and email address you entered

Procedure

Do the following to request a copy of your password:

1. From the webpage for your district, click the Employee Portal link.

The following screen is displayed.

The screenshot shows the Employee Portal interface. At the top left is the 'esd' logo for 'education solutions development, Inc.'. To the right are navigation links: 'DEDUCTIONS', 'ATTENDANCE', 'BENEFITS', and 'TIMESHEETS'. Below these is a login form with the following fields: 'User ID :', 'PIN :', and 'Institution : SAR CNTY SCHL BRD'. A 'Sign-in' button is located below the form. To the right of the form is a 'User assistance:' section with a link for 'Forgot Password'.

2. Click **Forgot Password?**

The Portal redisplay the dialog box and its fields.

The screenshot shows the 'Forgot Password?' dialog box. It has three input fields: 'Employee SSN :', 'Email:', and 'Institution: SAR CNTY SCHL BRD'. Below these fields are 'Submit' and 'Clear' buttons. To the right is a 'User assistance:' section with links for 'Forgot Password' and 'Back to Login'.

3. Enter your Employee SSN and email address, then click the Submit button.
4. Check your email to retrieve your password, and use it to sign on to the Portal.