

Welcome to the alio Employee Portal!

The alio Employee Portal is a component of our alio Financial and Human Resources Software Program. Convenient and easy to use, the portal is a valuable tool to access your personal information as well as a staff directory and a library of district forms. Connecting is secure and easy from any computer with internet access.

With the Employee Portal you can:

- View your current business and personal online business card information
- View a message area including district contact information for alio help and inquiries
- Access a staff directory
- Access a variety of district forms
- View your paycheck calendar
- View and/or print a copy of your pay stub (check or advice of deposit)
- View and/or print a copy of your W2's
- View leave balances and details (Personal, sick, vacation)
- View detailed leave calendar
- View your active deductions
- View your active benefits
- Submit changes to your demographic information to HR

What follows is a guide for using the alio Employee Portal. Please read through the following guide before logging on. Please print this guide only if necessary. The Portal is very user friendly and most will not need to refer to the guide after navigating through the portal once or twice. We are focusing on saving paper and printing costs by providing this information online. If you choose, you can save it to your desktop for future reference.

District 67 employees will use:

<http://lfsalioapp.lfschools.net:81/epd67/employee/serve/ss-request.php>

District 115 employees will use:

<http://lfsalioapp.lfschools.net:81/epd115/employee/serve/ss-request.php>

You can bookmark the web address in your “favorites” for easy access.

For employee information such as your employee ID number, please contact Lisa Tadel, ltadel@lfschools.net
For help or questions about the Employee Portal, please contact Lisa Gillespie, lgillespie@lfschools.net

Navigating the Employee Portal

Creating an Account

Your first step as a new user of Employee Portal is to create an account. You must have an active employee record in the **alio** software solution to create an Employee Portal account.

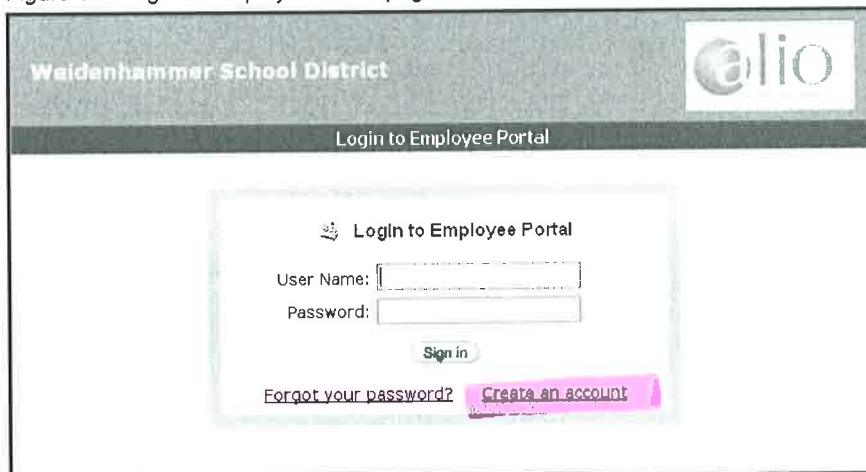
If granted permission by the administrator, a former employee (employee status in **alio** is inactive) may create an Employee Portal account.

To create an Employee Portal account:

1. Launch your Web browser and open the Employee Portal Employee Interface. The **Login to Employee Portal** page appears.

Tip: A message will display if the MySQL or Oracle connection is not available. Contact your Employee Portal administrator for assistance.

Figure 1-1. Login to Employee Portal page



The screenshot shows a web browser window displaying the 'Login to Employee Portal' page. The page header includes 'Weidenhammer School District' and the 'alio' logo. The main content area is titled 'Login to Employee Portal' and contains a form with the following elements: a title 'Login to Employee Portal', a 'User Name:' label followed by a text input field, a 'Password:' label followed by a text input field, a 'Sign in' button, and two links at the bottom: 'Forgot your password?' and 'Create an account'.

2. Click the **Create an account** link. The **Create New Account** page appears.

Tip: Fields marked with a red asterisk (*) are required.

Navigating the Employee Portal

Figure 1-2. Create New Account page

Create New Account * Required Information

Personal Information

* Employee No * Last 4 of Social Security No

* First Name * Birth Date -- -- -- --

* Last Name * Zip Code

Profile Information

* User Name Minimum 6 characters

* New Password Minimum 7 characters

* Confirm Password

* Email
Email will be used for system notification and retrieving login information

3. In the **Employee No** field, type your employee identification number. This number is assigned in **alio**.
4. In the **First Name** field, type your first name.
5. In the **Last Name** field, type your last name.
6. In the **Last 4 of Social Security No** field, type the last four digits of your social security number.
7. In the **Birth Date** field, select the year, month, and day of your birth date.
8. In the **Zip Code** field, type the zip code of your current home address.
9. In the **User Name** field, type the user name you want to use to log in to Employee Portal. You must enter at least six characters. The back slash (\) character is not valid. If entered, an error message will display prompting you to remove the \ from the User Name.
10. In the **New Password** field, type the password you want to use to log in to Employee Portal. You must type a minimum of 6 characters. Single and double quote characters are not permitted.
11. In the **Confirm Password** field, type the same password you entered in the **New Password** field.
12. In the **Email** field, type the e-mail address at which you want to receive automatic notifications from Employee Portal.
13. Click the **Submit** button to save your employee profile. An e-mail notification is sent to the Employee Portal Info Email account.

Navigating the Employee Portal

Logging in to Employee Portal

Follow this procedure to log in to the Employee Portal Employee interface.

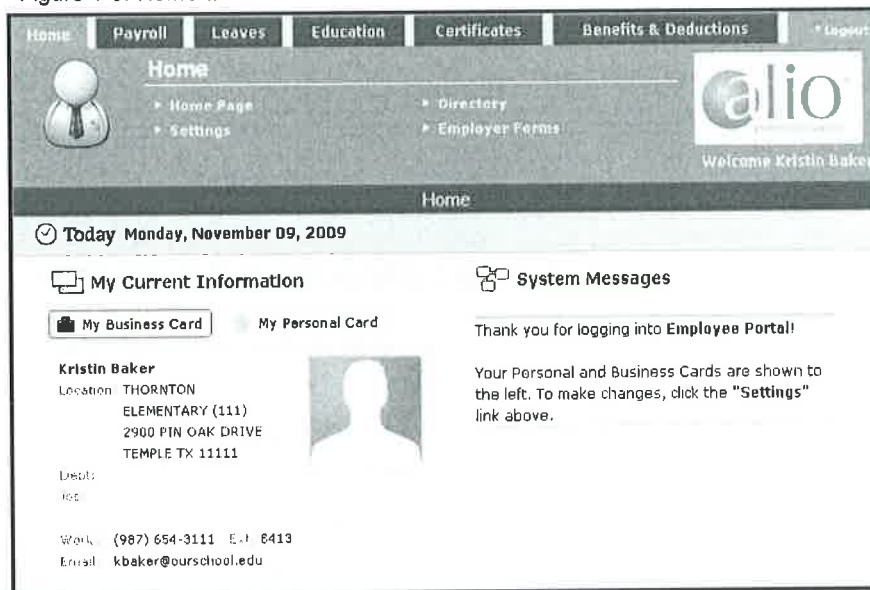
NOTE: If you click the browser's **Back** button when the **Home** page is displayed, the **Login to Employee Portal** page appears and your Employee Portal session ends.

To log in to the Employee interface:

1. Launch your Web browser and open Employee Portal. The **Login to Employee Portal** page appears (see Figure 1-1 on page 2).
2. In the **User Name** field, type your user name.
3. In the **Password** field, type your password.
4. Click **Sign in** to open Employee Portal. The **Employee Portal Home** tab appears.

Tip: A message will display if the MySQL or Oracle connection is not available. Contact your Employee Portal administrator for assistance.

Figure 1-3. Home tab



Requesting/Resetting a Password

Use the **Forgot your password?** link to request a new password, if you forget your current password. You will receive an e-mail that contains a link to access the **Reset Your Password** page.

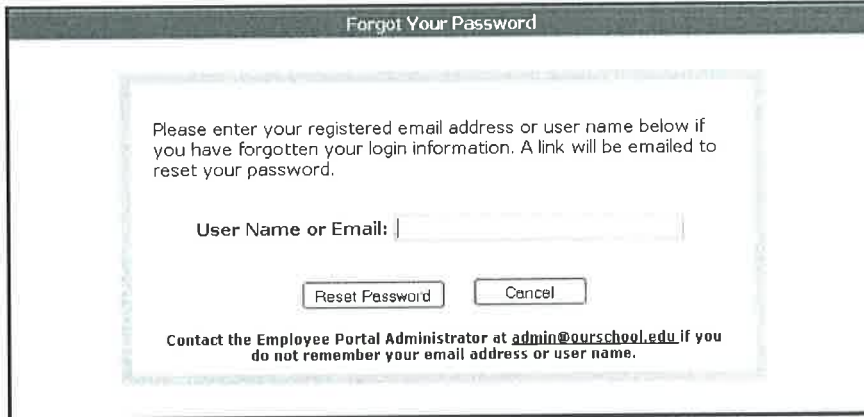
■ **NOTE:** This link will expire two days (48 hours) after the e-mail is generated.

A system administrator can also log into the system and manually unlock an employee's locked account.

To reset your password:

1. On the **Login to Employee Portal** page, click the **Forgot your password?** link. The **Forgot Your Password** page appears.

Figure 1-6. Forgot Your Password page

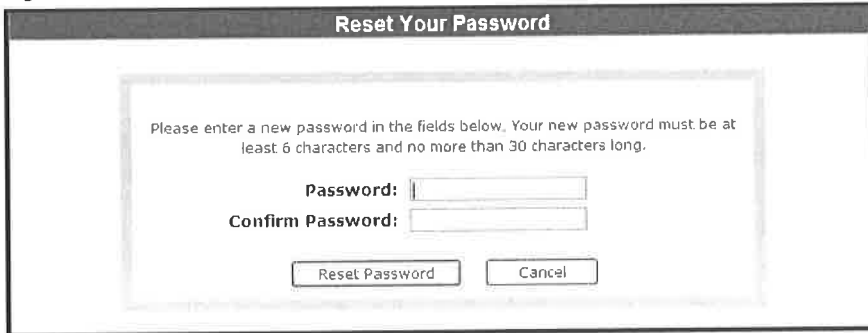


2. In the **User Name or Email** field, type your current user name or your e-mail address.
Note: You may contact your Employee Portal Administrator using the e-mail address located at the bottom of the page if you do not remember your e-mail address or user name.
3. Click **Reset Password**. A message appears notifying you that a link was sent to your e-mail address.
4. Launch your e-mail account and open the e-mail notification.

Navigating the Employee Portal

5. Click the link included in the e-mail. The **Reset Your Password** page appears.

Figure 1-7. Reset Your Password page



Reset Your Password

Please enter a new password in the fields below. Your new password must be at least 6 characters and no more than 30 characters long.

Password:

Confirm Password:

6. In the **Password** field, type your new password. You must type a minimum of 6 characters. Single and double quote characters are not permitted.
7. In the **Confirm Password** field, type your new password again.
8. Click **Reset Password** to save the new password. The next time you log in to the Employee Portal you must use your new password.

Logging out of Employee Portal

To log out of Employee Portal:

- Click the **Logout** link in the upper right corner of the page.

Navigating Employee Portal Pages

Employee Portal is a Web-based software solution. Use this section to familiarize yourself with the terminology related to the Employee Portal pages and the techniques used to navigate those pages.

The following figure illustrates a typical page and identifies the essential items on that page that are referenced throughout this guide.

Figure 1-8. Employee Portal page components

The screenshot shows the 'Leave Details' page in the Employee Portal. The page has a navigation bar with tabs: Home, Payroll, Leaves, Education, Certificates, and Benefits & Deductions. A 'Log Out' link is also present. Below the navigation bar, there are links for 'Leave Balances' and 'Leave Details'. The page title is 'Leave Details'. A 'Drop Down list' for 'Leave Type' is set to 'Personal'. The main content is a table with the following data:

Leave Type	From	To	Description	Duration	Dock	Hour/Day	Posted
Personal	11/01/2009	11/01/2009	ACCRUAL	5	0	HOURLY	POSTED
Personal	10/03/2009	10/03/2005	ACCRUAL	5	0	HOURLY	POSTED
Personal	09/01/2009	09/01/2009	ACCRUAL	5	0	HOURLY	POSTED
Personal	12/01/2008	12/01/2008	ACCRUAL	5	0	HOURLY	POSTED
Personal	01/01/2009	01/01/2009	ACCRUAL	5	0	HOURLY	POSTED
Personal	04/01/2009	04/01/2009	ACCRUAL	5	0	HOURLY	POSTED
Personal	03/01/2009	03/01/2009	ACCRUAL	5	0	HOURLY	POSTED
Personal	02/01/2009	02/01/2009	ACCRUAL	5	0	HOURLY	POSTED
Personal	08/01/2009	08/01/2009	ACCRUAL	5	0	HOURLY	POSTED
Personal	05/01/2009	05/01/2009	ACCRUAL	5	0	HOURLY	POSTED

At the bottom of the page, there are 'Page Links' for navigation: << < 1 2 3 4 5 ... > >> Page: 1

Annotations in the image point to the following components:

- Tab**: Points to the 'Leaves' tab in the navigation bar.
- Links**: Points to the 'Leave Balances' and 'Leave Details' links.
- Page title**: Points to the 'Leave Details' title.
- Drop Down list**: Points to the 'Leave Type' dropdown menu.
- Column Headings**: Points to the table headers.
- Page Details**: Points to the table rows.
- Page Links**: Points to the pagination controls.

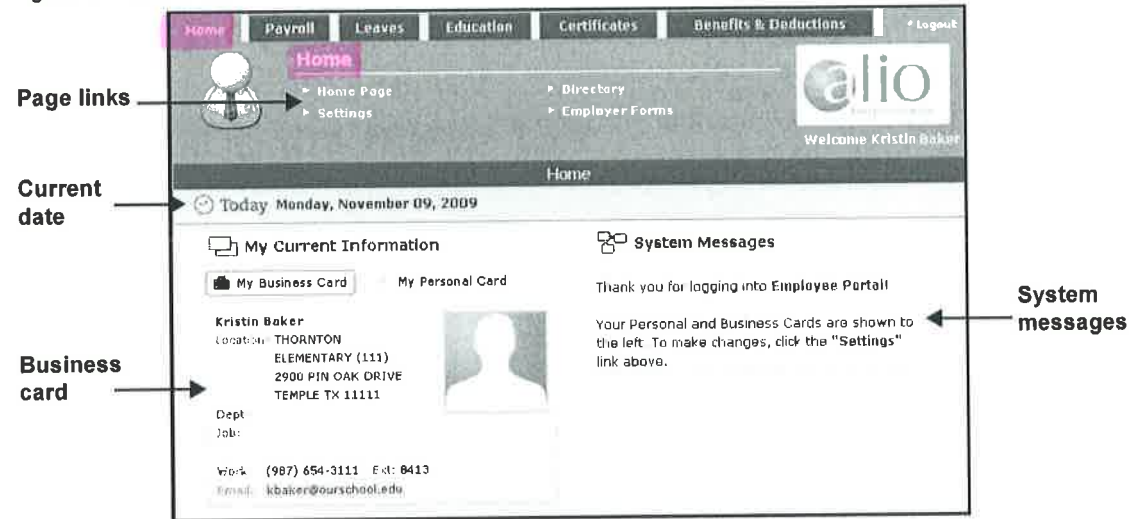
Using the Home Tab

Navigating the Home Tab

Use the Home tab to access the links to configure your Employee Portal settings, display a company directory, and view company forms.

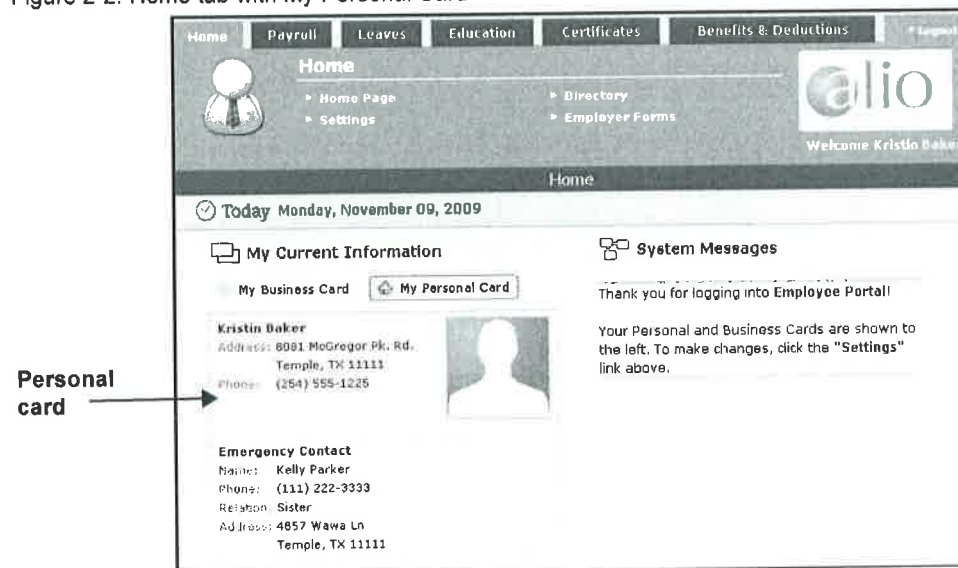
NOTE: If you click the browser's **Back** button when the **Home** page is displayed, the **Login to Employee Portal** page appears and your Employee Portal session ends.

Figure 2-1. Home tab



Click the **My Personal Card** button to view your personal contact information.

Figure 2-2. Home tab with My Personal Card



Using the Home Tab

Home Tab Links

Click the links at the top of the Home tab to configure the Employee Portal Employee Interface account settings, view a company directory, and view company forms. The following table explains each option.

Table 2-1. Home tab links

Link	Purpose	Page Ref
Home Page	Click the Home Page link to return to the Home tab from another page in the Employee Interface.	N/A
Settings	Click the Settings link to configure your Employee Portal account settings.	Page 14
Directory	Click the Directory link to view a company directory. You can also search for an employee in the directory and print that employee's business and personal cards.	Page 20
Employer Forms	Click the Employer Forms link to view and print company forms.	Page 26

Using the Home Tab

Configuring Your Employee Portal Account Settings

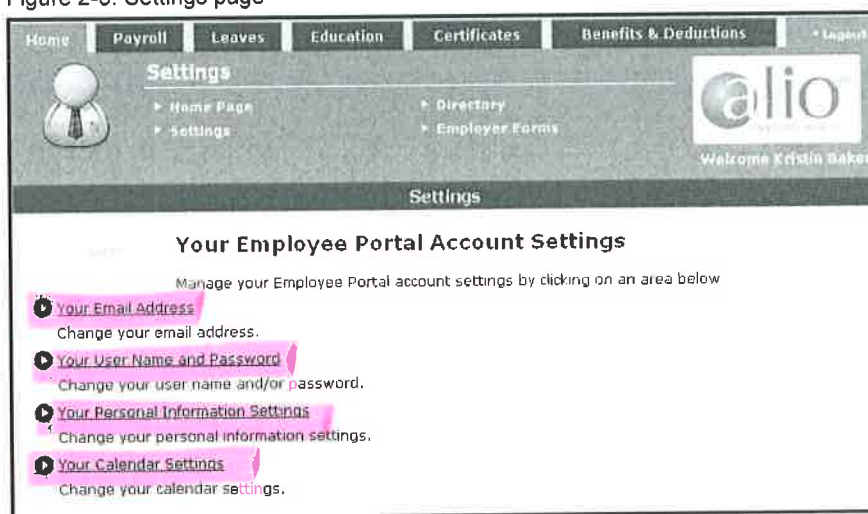
Use the Settings link to:

- Change your e-mail address, Employee Portal user name, and password
- Select the home information that displays in the Company Directory
- Set the start and end month for the calendars that display on the Pay Check Calendar and Leave Balances pages

To configure your Employee Portal account settings:

- On the **Home** tab, click the **Settings** link. The **Settings** page appears.

Figure 2-3. Settings page



Using the Home Tab

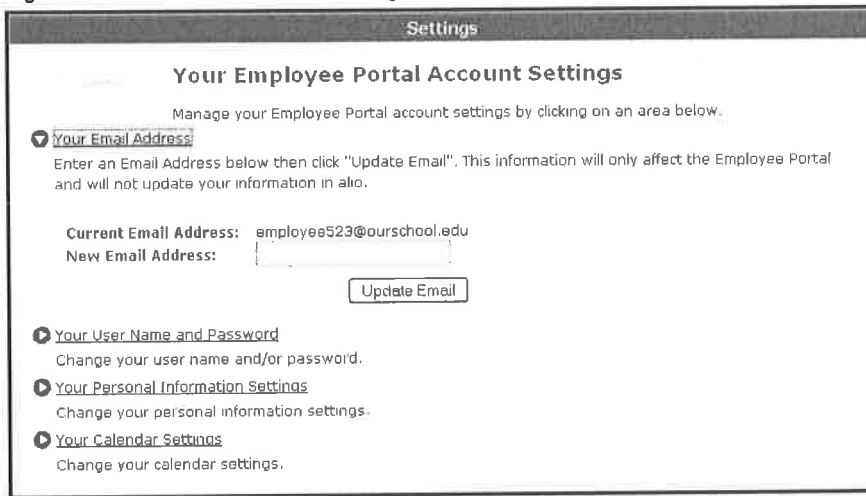
Updating Your Employee Portal E-mail Address

Use the Your Email Address link to change the e-mail address used by the automated e-mail notification system. Changing your e-mail address in Employee Portal does not update your e-mail address in **alio**.

To update your e-mail address:

1. Click the **Your Email Address** link.

Figure 2-4. Your Email Address settings



Settings

Your Employee Portal Account Settings

Manage your Employee Portal account settings by clicking on an area below.

- ▼ **Your Email Address**
Enter an Email Address below then click "Update Email". This information will only affect the Employee Portal and will not update your information in alio.

Current Email Address: employee523@ourschool.edu
New Email Address:
- ▶ **Your User Name and Password**
Change your user name and/or password.
- ▶ **Your Personal Information Settings**
Change your personal information settings.
- ▶ **Your Calendar Settings**
Change your calendar settings.

2. In the **New Email Address** field, type the e-mail address you want to use with the automated e-mail notification system.
3. Click the **Update Email** button to save the new e-mail address. A message is displayed stating that your settings were saved and the **Your Email Address** link is closed.

Using the Home Tab

Updating Your User Name and Password

Use the [Your User Name and Password](#) link to change your user name and your password.

To update your user name:

1. Click the **Your User Name and Password** link.

Figure 2-5. Your User Name and Password settings

Settings

Your Employee Portal Account Settings

Manage your Employee Portal account settings by clicking on an area below.

- ▶ [Your Email Address](#)
Change your email address.
- ▶ **[Your User Name and Password](#)**
User Name
Enter a new User Name of a minimum 6 characters. Then click "Update User Name".

Current User Name: employee523
New User Name:
- ▶ **Password**
Enter your current password in "Old Password". Then enter your new password below and click "Update Password".

Old Password:
New Password:
Re-type New Password:
- ▶ [Your Personal Information Settings](#)
Change your personal information settings.
- ▶ [Your Calendar Settings](#)
Change your calendar settings.

2. Type the **New User Name**.
3. Click the **Update User Name** button. A message is displayed stating that your settings were saved and the **Your User Name and Password** link is closed.

The next time you log in to Employee Portal, use your new user name.

Using the Home Tab

To update your password:

1. Click the **Your User Name and Password** link.
2. In the **Old Password** field, type your current password.
3. In the **New Password** field, type your new password. You must type a minimum of 6 characters. Single and double quote characters are not permitted.
4. In the **Re-type New Password** field, type your new password again.
5. Click the **Update Password** button. A message is displayed stating that your settings were saved and the **Your User Name and Password** link is closed.

The next time you log in to Employee Portal, use your new password.

Changing Your Personal Settings

Use the **Your Personal Information Settings** link to set the default home information that displays on the **My Personal Card** in the **Company Directory** page.

To change your personal settings:

1. Click the **Your Personal Information Settings** link.

Figure 2-6. Your Personal Information Settings

Settings

Your Employee Portal Account Settings

Manage your Employee Portal account settings by clicking on an area below.

- [Your Email Address](#)
Change your email address.
- [Your User Name and Password](#)
Change your user name and/or password.
- [Your Personal Information Settings](#)
Select the checkboxes below to display related information in the Directory. Click "Update Settings" to commit your changes.
 - Display Home Address
 - Display Home Phone
- [Your Calendar Settings](#)
Change your calendar settings.

2. Click to select the **Display Home Address** check box to display your home address on the **My Personal Card** on the **Company Directory** page. Select this option to make your home address visible to all employees.
3. Click to select the **Display Home Phone** check box to display your home telephone number on the **Personal Information Card** in the **Company Directory**. Select this option to make your home telephone number visible to all employees.
4. Click the **Update Settings** button to save your changes. A message is displayed stating that your settings were saved and the **Your Personal Information Settings** link is closed.

Using the Home Tab

Changing Your Calendar Settings

Use the Your Calendar Settings link to set the start and end month for the calendars that display on the following pages:

- Pay Check Calendar page
- Leave Balances page

To change your calendar settings:

1. Click the **Your Calendar Settings** link.

Figure 2-7. Your Calendar Settings

Settings

Your Employee Portal Account Settings

Manage your Employee Portal account settings by clicking on an area below

- ▶ [Your Email Address](#)
Change your email address.
- ▶ [Your User Name and Password](#)
Change your user name and/or password.
- ▶ [Your Personal Information Settings](#)
Change your personal information settings.
- ▶ [Your Calendar Settings](#)
Select the starting and ending month for the calendar displayed on the Pay Check Calendar and Leave Balances pages. Click "Update Settings" to commit your settings.

Starting Month: 01 ▼

Ending Month: 12 ▼

2. In the **Starting Month** list, click the first month that will display in the calendars, where 01 represents January, 02 represents February, and so on. For example, to display a calendar from January through December, select 01 as the starting month.
3. In the **Ending Month** list, click the last month that will display in the calendars, where 01 represents January, 02 represents February, and so on. For example, to display a calendar from January through December, select 12 as the ending month.
4. Click the **Update Settings** button to save your changes. A message is displayed stating that your settings were saved and the **Your Calendar Settings** link is closed.

Viewing the Company Directory

Use the Directory link to view all employees that work in your organization or in one specific location. Your system administrator determines the locations that you can view in the Company Directory.

An employee must have an active status in **alio** to be included in the Company Directory. If the employee's record in **alio** has an inactive status, that employee's information is not available in the Company Directory even if their Employee Portal status is active. An inactive status in **alio** indicates the employee is no longer part of your organization.

The Location displayed on the employee's Business Card is from the employee's current job. If no valid job is found in the current contract year, the employee's work location is used. If more than one work location record exists, the first one found is displayed. If there is no work location record found, then a message displays stating no current information can be found for this employee.

You can use the Your Personal Information Settings link on the Settings page to determine the home information that displays on your My Personal Card in the Company Directory. You can elect to display your primary home address and telephone number, only your home address, only your telephone number, or no home information. The primary home address and phone number that displays is maintained in **alio**.

To view the Company Directory:

1. On the **Home** tab, click the **Directory** link. The **Company Directory** page appears.

Using the Home Tab

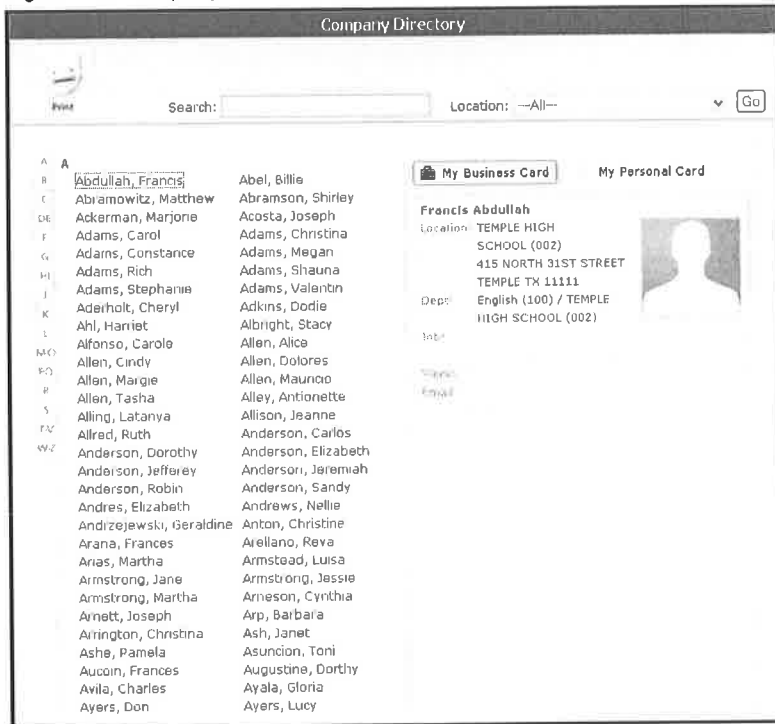
Figure 2-8. Company Directory page



2. Click an **Alphabet** tab to list all employees whose last name begins with that letter.
3. Click a name in the employee list to display that employee's Business Card.

Using the Home Tab

Figure 2-9. Company Directory displaying an employee's business card



Using the Home Tab

4. Click the **My Personal Card** button to display that employee's home information, if available.

Figure 2-10. Company Directory displaying an employee's personal card

The screenshot shows a web application titled "Company Directory". At the top, there is a search bar and a "Location" dropdown menu set to "All". Below the search bar is a list of employees, organized by their last name. The list is divided into two columns. On the right side of the application, there is a detailed view for "Francis Abdulleh". This view includes a "My Business Card" tab and a "My Personal Card" tab. The "My Personal Card" tab is active, displaying the following information: "Francis Abdulleh", "Address: 10950 FM 438, Troy, TX 77111", and "Phone: (254) 555-0046". There is also a placeholder for a profile picture.

Employee Name	Employee Name
Abdullah, Francis	Abel, Billie
Abramowitz, Matthew	Abramson, Shirley
Ackerman, Marjorie	Acosta, Joseph
Adams, Carol	Adams, Christina
Adams, Constance	Adams, Megan
Adams, Rich	Adams, Shauna
Adams, Stephanie	Adams, Valentin
Aderholt, Cheryl	Adkins, Dodie
Ahl, Harriet	Albright, Stacy
Alfonso, Carole	Allen, Alice
Allen, Cindy	Allen, Dolores
Allen, Margie	Allen, Mauricio
Allen, Tasha	Alley, Antonette
Alling, Latanya	Allison, Jeanne
Allred, Ruth	Anderson, Carlos
Anderson, Dorothy	Anderson, Elizabeth
Anderson, Jefferev	Anderson, Jeremiah
Anderson, Robin	Anderson, Sandy
Andres, Elizabeth	Andrews, Nellie
Andrzejewski, Geraldine	Anton, Christine
Arana, Frances	Arellano, Reva
Arias, Martha	Armstead, Luisa
Armstrong, Jane	Armstrong, Jessie
Armstrong, Martha	Arneson, Cynthia
Arnett, Joseph	Arp, Barbara
Arlington, Christina	Ash, Janet
Ashe, Pamela	Asuncion, Toni
Aucoin, Frances	Augustine, Dorothy
Avila, Charles	Ayala, Gloria
Ayers, Don	Ayers, Lucy

Using the Home Tab

Searching the Directory for an Employee Record

You can search the directory by name for a specific employee record, by location, or by name and location.

To search for an employee record by name:

1. In the **Search** field, type the characters contained in the employee's name.
2. Click the **GO** button to display the employee records on each **Alphabet** tab that meet the search criteria entered, that is the characters entered are contained in the employee's name.

To list employee records by location:

1. In the **Location** field, click the location from the list provided. Your system administrator determines the locations available for selection in this list.
2. Click the **GO** button to display the employees on each Alphabet tab that work in the selected location.

To search for an employee by name and location:

1. In the **Search** field, type the characters contained in the employee's name.
2. In the **Location** field, click the location from the list provided. Your system administrator determines the locations available for selection in this list.
3. Click the **GO** button to display the employees on each **Alphabet** tab that meet the selected search criteria.

Using the Home Tab

Viewing Employer Forms

Use the Employer Forms link to view company forms uploaded by the system administrator.

IMPORTANT: You must select the **Display PDF in browser** option to view PDF documents using Adobe® Reader. You may set this option by accessing **Edit > Preferences > Categories: Internet in Adobe Reader**.

To view a company form:

1. On the **Home** tab, click the **Employer Forms** link. The **Employer Forms** page appears.

Figure 2-12. Employer Forms page



2. Click a form name to download the form. A window appears prompting you to save or open the form.
3. Select the **Save** option to save the form to a directory on your computer or the **Open** option to open the form in a new window.

Tip: If you open the form in a new window, you can print the form using the application's print function.

4. Click **Close** to close the page.

Using the Payroll Tab

Navigating the Payroll Tab

Use the Payroll tab to view the payroll calendar for the current year and your Payroll Advice, salary compensation details and W-2s. Your system administrator determines the number of past year pay checks/advices and W-2s available to view and print.

You can set the first and last month that display in the pay check calendar using the Your Calendar Settings link on the Settings page. Refer to “Changing Your Calendar Settings” on page 19 for further information.

Dates with a green highlight represent a pay day.

Figure 3-1. Payroll tab

The screenshot shows a web application interface for the Payroll tab. At the top, there are navigation tabs: Home, Payroll (selected), Leaves, Education, Certificates, and Benefits & Deductions. Below the tabs is a header area with a 'Pay Check Calendar' title and a search bar. The main content area is titled 'Pay Check Calendar' and contains a legend: 'Click on highlighted days to view Pay Check/Advice Detail.' and a small square icon labeled 'Pay Day'. Below the legend is a calendar for the year 2009, showing months from January to December. Each month's calendar has days of the week (S, M, T, W, T, F, S) and dates. Green highlights on specific dates indicate pay days: January 15, February 18, March 15, April 17, May 18, June 19, July 20, August 20, September 18, October 20, November 20, and December 18.

Using the Payroll Tab

To change the calendar year:

- Click the **Left Arrow** button to view a previous year's pay check calendar. Click the **Right Arrow** button to view the next year's pay check calendar.

Note: Your administrator defines the range of years available in the **Calendar Year** field.

Click **Today** to return to the pay check calendar for the current year.

Viewing Your Pay Check/Advice Detail

You can view and optionally print a Pay Advice for any pay day. Pay days are highlighted in green.

If you received multiple checks on the same day, a Pay Check List displays the checks paid on that day. You can select a check to view that pay check and advice detail.

Searching for a Pay Advice

You can use the Past Pay Checks list on the Pay Check/Advice Detail page to search for a pay check by date and check number.

To search by date and check number:

- In the **Past Pay Checks** list, click a pay date/check number record. The **Pay Check/Advice Detail** for that pay date and check number displays on the page.

Note: Your administrator defines the range of years available in the **Past Pay Checks** list.

Viewing and Printing a Pay Advice

Follow these instructions to view and print a pay advice. Your organization's logo will print at the top of the pay check/advice if the logo is defined in the Employee Portal system preferences by your administrator.

Using the Payroll Tab

To view and print your Pay Advice:

1. In the **Pay Check Calendar** page, click the pay date for the Pay Advice to view. If you received multiple pay check on that date, a **Pay Check List** page appears.

If you received only one pay check on the day, the **Pay Check/Advice Detail** page appears (see Figure 3-3 on page 30).

Figure 3-2. Pay Check List page

Pay Check List				
Employee No	Employee Name	Check Date	Check No	Net Pay
160628	Kristin Baker	01/04/2008	<u>30159795</u>	\$2,290.00
160628	Kristin Baker	01/04/2008	<u>30159796</u>	\$172.93

<< < 1 > >> Page: 1

2. Click a pay check in the list to view the corresponding advice detail. The **Pay Check/Advice Detail** page appears.

Note: If the **Pay Period Start** and **Pay Period End** dates are not set, these fields will not display on the **Pay Check/Advice Detail** page because this functionality was not supported prior to the **alio 10.3** release.

Figure 3-3. Pay Check/Advice Detail page

Pay Check/Advice Detail									
Print									
Past Pay Checks									
Pay Check/Advice									
Employee Name	Employee Number	Withholding Status		Add Withholding		Check Date	Check Number		
Adams, Jane	001896	Federal	State	Federal	State	12/18/2009	00105598		
Employer Name	Pay Period Start	Pay Period End		Check Message					
Longbranch School District	09/18/2009	08/21/2010							
Earnings				Deductions/Benefits					
Rate	Time	Amount	Description	Description	Deduction Amount	YTD Deduction Amount	Benefit Amount	YTD Benefit Amount	
6,095.25	144	6,095.25	ART	0153 OFFENHEIMER ANNUITY	790.00	9,480.00			
1,200.00	0	1,200.00	PRO GROWTH	0201 TRS	502.90	5,121.25			
354.21	144	354.21	T C ALLOTMENT	0202 TRS INS	51.08	520.12			
208.35	144	208.35	MASTERS	0322 MED REIMBURSE	50.00	600.00			
				0328 DENTAL INS E1	33.00	396.00			
				0345 AMFI DISABILITY	69.56	834.72			
				1200 TRS EXCESS			158.97	2,190.67	
				1201 TRS CARE			43.22	440.12	
				1300 HEALTH BENEFIT			354.00	4,248.00	
				1301 LIFE CONTRIB			6.00	72.00	
				1302 DENTAL BENEFIT			30.00	360.00	
				1501 W C PROF			31.43	320.94	
				1600 UNEMPLOYMENT			7.77	79.00	
				2200 TRS PASS THRU			315.27	5,677.26	
Direct Deposit									
DFI Bank No	DFI Bank Name			DFI Account Number			Amount		
314970664				*****1856			5,667.73		
	GROSS	TAX DEFERRED DEDUCTIONS	SEC. 125	TAXABLE EARNINGS	FEDERAL TAX WITHHELD	STATE TAX WITHHELD	MISC. DEDUC.	SOC. SEC. MEDICARE	NET PAY
Current	7,857.81	790.00	83.00	6,481.91	693.54	0.00	623.54	0.00	5,667.73
YTD	80,019.76	9,480.00	996.00	64,422.51	6,451.74	0.00	6,476.09	0.00	56,615.23

Using the Payroll Tab

3. Optionally, click the **Print** button to print the Pay Advice. The **Print Pay Check/Advice** page and **Print** window appear.
4. Print the **Pay Advice**.
5. Click **Close** to close the **Print Pay Check/Advice** page.

Using the Payroll Tab

Downloading a W-2

Use the View W-2s link to download a W-2 for a previous year or the current year. Your system administrator determines the number of past year W-2s you can download.

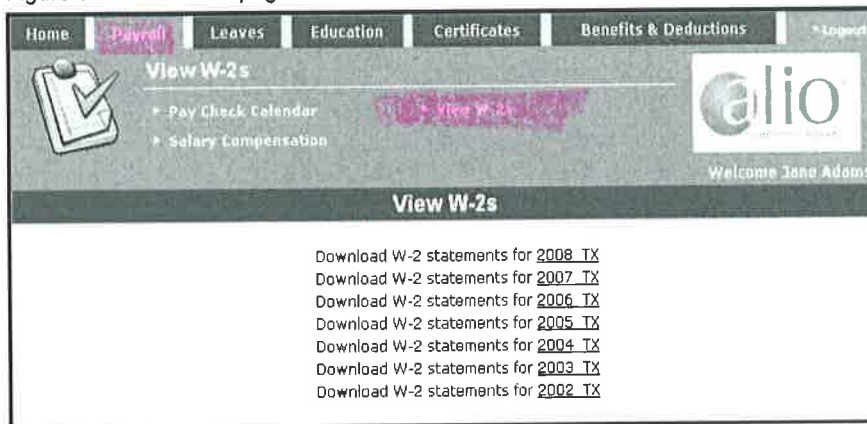
Your district's policy will dictate if you can view and print your original W-2 form or a reissued W-2 form.

IMPORTANT: You must select the **Display PDF in browser** option to view PDF documents using Adobe® Reader. You may set this option by accessing **Edit > Preferences > Categories: Internet in Adobe Reader**.

To download a W-2:

1. On the **Payroll** tab, click the **View W-2s** link. The **View W-2s** page appears.

Figure 3-5. View W-2s page



2. Click the **year** link to download the W-2 you want to view. The W-2 displays in PDF format on a new page.

You can print or save the W-2.

3. When finished, close the W-2 document.

Navigating the Leaves Tab

Use the Leaves tab to display a table showing the beginning balance, earned FTD, pending leave (requested via Self Serve but not posted plus any requests awaiting processing in alio HRS), taken FTD, and ending balance for each leave type that you accrue. You can also view a calendar that shows when you have scheduled leave days. The type of leave is identified by the color highlighting the date.

Tip: Refer to the calendar legend to determine the type of leave. See the following figure for the location of the calendar legend.

You can set the first and last month that display in the leaves calendar using the Your Calendar Settings link on the Settings page. Refer to “Changing Your Calendar Settings” on page 19 for further information.

Figure 4-1. Leaves tab

Calendar legend

Leave Type	Hours/Days	Beginning Balance	Earned FTD	Pending*	Taken FTD	Ending Balance
ATHLETICS	DAILY	0.000000	0.000000	0.000000	0.000000	0.000000
COMP HOUR	HOURLY	0.000000	0.000000	0.000000	0.000000	0.000000
EDUCATION LV EDUCATORA	DAILY	3.500000	0.000000	0.000000	0.000000	-1.000000
JURY DUTY	DAILY	0.000000	0.000000	0.000000	2.000000	-2.000000
LOCAL SICK	HOURLY	63.500000	15.000000	6.000000	8.000000	68.500000
OTHER	DAILY	0.000000	0.000000	0.000000	9.000000	-9.000000
STATE PERSONAL	DAILY	32.000000	15.000000	0.000000	11.000000	37.000000
STATE SICK LV	HOURLY	14.500000	0.000000	0.000000	0.000000	14.500000

*Requests not finalized and any requests waiting processing in HRS.

Legend:

- ATHLETICS
- LOCAL SICK
- COMP HOUR
- OTHER
- EDUCATION LV EDUCATORA
- STATE PERSONAL
- JURY DUTY
- STATE SICK LV

Calendar Legend: A key showing color-coded boxes for each leave type: ATHLETICS (light blue), LOCAL SICK (light green), COMP HOUR (light purple), OTHER (light orange), EDUCATION LV EDUCATORA (light pink), STATE PERSONAL (light yellow), JURY DUTY (light cyan), and STATE SICK LV (light magenta).

Calendar: A grid showing the months of 2012 (January through December). Dates are highlighted in colors corresponding to the legend, indicating scheduled leave days.

Using the Leaves Tab

To change the calendar year:

- Click the **Left Arrow** button to view a previous year's leave calendar. Click the **Right Arrow** button to view the next year's leave calendar.

Click **Today** to return to the leave calendar for the current year.

Filtering the Leaves Calendar

Use the Leave Type list to filter the types of leaves that display on the calendar. The default is to display all leave types on the calendar.

To filter the calendar by leave type:

- In the **Leave Type** list, click the type of leave you want to display. The Leave type table and calendar display only the selected leave type details.

Viewing Leave Details

You can view leave details using one of the following methods:

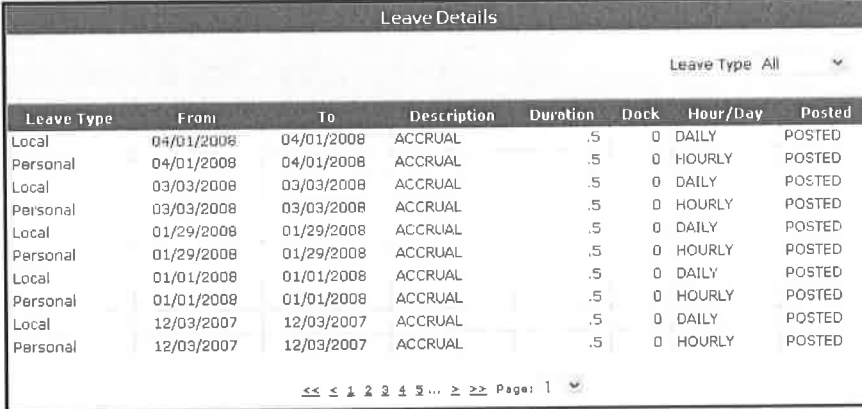
- Click the Leave Details link.
- Click a Leave Type link in the Leaves table.
- Click a highlighted date in the Leaves Calendar.

NOTE: See the sorting and page navigation methods in “Navigating Employee Portal Pages” on page 8.

To view leave details:

1. Select the method you want to use to view leave details. The **Leave Details** page appears.

Figure 4-2. Leave Details page



The screenshot shows a web interface titled "Leave Details". At the top right, there is a dropdown menu labeled "Leave Type" with "All" selected. Below this is a table with the following columns: Leave Type, From, To, Description, Duration, Dock, Hour/Day, and Posted. The table contains 12 rows of data, alternating between "Local" and "Personal" leave types. At the bottom of the table, there is a pagination control showing "Page: 1" and navigation arrows.

Leave Type	From	To	Description	Duration	Dock	Hour/Day	Posted
Local	04/01/2008	04/01/2008	ACCRUAL	.5	0	DAILY	POSTED
Personal	04/01/2008	04/01/2008	ACCRUAL	.5	0	HOURLY	POSTED
Local	03/03/2008	03/03/2008	ACCRUAL	.5	0	DAILY	POSTED
Personal	03/03/2008	03/03/2008	ACCRUAL	.5	0	HOURLY	POSTED
Local	01/29/2008	01/29/2008	ACCRUAL	.5	0	DAILY	POSTED
Personal	01/29/2008	01/29/2008	ACCRUAL	.5	0	HOURLY	POSTED
Local	01/01/2008	01/01/2008	ACCRUAL	.5	0	DAILY	POSTED
Personal	01/01/2008	01/01/2008	ACCRUAL	.5	0	HOURLY	POSTED
Local	12/03/2007	12/03/2007	ACCRUAL	.5	0	DAILY	POSTED
Personal	12/03/2007	12/03/2007	ACCRUAL	.5	0	HOURLY	POSTED

2. To filter the leave details by type, click a **Leave Type** from the list provided. The table displays leave records for the leave type selected.

6

Using the Certificates Tab

Use the Certificates tab to track earned certifications and to keep those certifications current. You can view active and expired certifications and endorsements related to a certification. Employee certifications are maintained in the **alio** HRS Employee Maintenance System.

This chapter discusses:

- Navigating the Certificates Tab
- Viewing Active Certificates
- Viewing Expired Certificates
- Viewing All Certificates
- Viewing Certificate Endorsements

Using the Certificates Tab

Navigating the Certificates Tab

Click the Certificates tab to display the Active Certificates page. This page lists all certification you have received along with the expiration date for each certification. Use this tab to verify that your certifications are correct and up-to-date.

Figure 6-1. Certificates tab

Certificate No.	Certificate Type	Certificate Level	Received Date	Exp. Date
082198	STAN	PK-8	10/01/2006	09/30/2012
121212	OneY	ALL	01/01/2009	12/31/2009
987654321	STAN	PK-8	11/19/2008	11/19/2010

Certificates Tab Links

Click the links at the top of the Certificates tab to view only active or expired certifications or all certifications. The following table explains each option.

Table 6-1. Certificates tab links

Link	Purpose	Page Ref
Active Certificates	Click the Active Certificates link to list your active certification records on file with Human Resources. Active certifications have an expiration date greater than today's date.	Page 42
Expired Certificates	Click the Expired Certificates link to list your certifications that have expired. Certificates displayed on this page are expired when the date is prior to or equal to today's date.	Page 42
All Certificates	Click the All Certificates link to list all of your certifications, both active and expired.	Page 43

Viewing Active Certificates

Use the Active Certificates page to view your current certificates.

NOTE: See the sorting and page navigation methods in “Navigating Employee Portal Pages” on page 8.

To view Active Certificates:

- Click the **Active Certificates** link.

Refer to Figure 6-1 on page 41 for an illustration of the **Active Certificates** page.

Viewing Expired Certificates

Use the Expired Certificates link to view your expired certificates.

NOTE: See the sorting and page navigation methods in “Navigating Employee Portal Pages” on page 8.

To view the Expired Certifications page:

- Click the **Expired Certificates** link.

Figure 6-2. Expired Certificates page

Certificate No.	Certificate Type	Certificate Level	Received Date	Exp. Date
555555	STAN	1-12	08/01/2008	07/31/2009

Viewing All Certificates

Use the All Certificates link to view your current and expired certificates.

NOTE: See the sorting and page navigation methods in “Navigating Employee Portal Pages” on page 8.

To view the All Certificates page:

- Click the **All Certificates** link.

Figure 6-3. All Certificates page

Certificate No.	Certificate Type	Certificate Level	Received Date	Exp. Date
082198	STAN	PK-8	10/01/2006	09/30/2012
121212	OneY	ALL	01/01/2009	12/31/2009
555555	STAN	1-12	08/01/2008	07/31/2009
987654321	STAN	PK-8	11/19/2008	11/19/2010

Viewing Certificate Endorsements

Optionally, you can select a certificate number to list the endorsements related to that certificate. Endorsements are defined in **alio**.

NOTE: See the sorting and page navigation methods in “Navigating Employee Portal Pages” on page 8.

To view the **Endorsements** page:

- On the **Active Certificates**, **Expired Certificates**, or **All Certificates** page, click the **Certificate No** link to list the endorsements related to that certificate. The **Endorsements** page appears.

Figure 6-4. Endorsements page

Endorsements				
Type	Level	Description	From	To
Bl	3	Elementary Self-Contained	10/01/2006	09/30/2012
ESL	2	Kindergarten	10/01/2006	10/01/2012
PROF	1	Information Processing Technology Elementary Music	10/01/2006	09/30/2012

<< < > >> Page: 1 ▼

Using the Benefits and Deductions Tab

Navigating the Benefits & Deductions Tab

Click the Benefits & Deductions tab to view your current payroll deductions and benefit packages for accuracy. You can also view future and expired payroll deductions and benefits.

Figure 7-1. Benefits and Deductions tab

Plan	Amount	Percent	Amount YTD	Start Date	End Date
0018 BCBS-BASIC EE ONLY	57.54		230.16		
TRSI TRS INSURANCE		0.65	31.76		
TRS TRS		6.40	312.68		

Benefits & Deductions Tab Links

Click the links at the top of the Benefits & Deductions tab to view current, future, and expired payroll deductions and benefit packages. The following table explains each option.

Table 7-1. Benefits & Deductions tab links

Link	Purpose	Page Ref
Active Deductions	Click the Active Deductions link to list your current payroll deductions. This is the default view.	Page 47
All Deductions	Click the All Deductions link to list your current, future, and expired payroll deductions.	Page 47
Active Benefits	Click the Active Benefits link to list your current benefit packages.	Page 48
All Benefits	Click the All Benefits link to list your current, future, and expired benefit packages.	Page 49

Using the Benefits and Deductions Tab

Viewing Active Deductions

Use the Active Deductions page to view your current payroll deductions. Your payroll deductions are maintained using the **alio** HRS Payroll Processing System.

NOTE: See the sorting and page navigation methods in “Navigating Employee Portal Pages” on page 8.

To view Active Deductions:

- Click the **Active Deductions** link.

Refer to Figure 7-1 on page 46 for an illustration of the Active Deductions page.

Viewing All Deductions

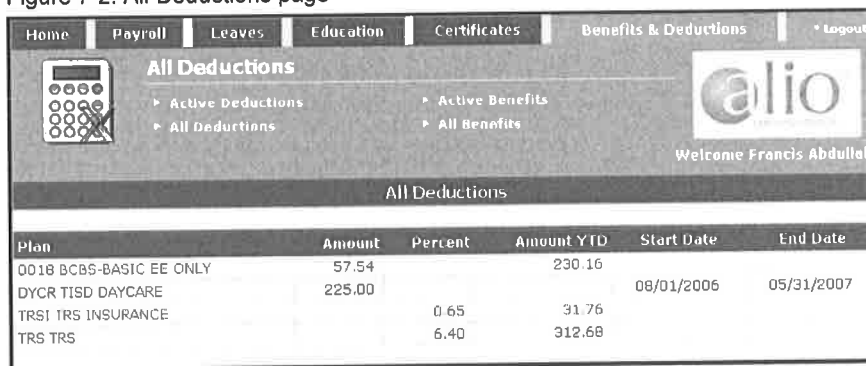
Use the All Deductions link to view your current, future, and expired payroll deductions. Future payroll deductions have a start date that begins in the future. Expired payroll deductions have an end date.

NOTE: See the sorting and page navigation methods in “Navigating Employee Portal Pages” on page 8.

To view the All Deductions page:

- Click the **All Deductions** link.

Figure 7-2. All Deductions page



Plan	Amount	Percent	Amount YTD	Start Date	End Date
0018 BCBS-BASIC EE ONLY	57.54		230.16		
DYCR TISD DAYCARE	225.00			08/01/2006	05/31/2007
TRS1 TRS INSURANCE		0.65	31.76		
TRS TRS		6.40	312.68		

Viewing Active Benefits

Use the Active Benefits page to view the benefit packages in which you are currently enrolled.

NOTE: See the sorting and page navigation methods in “Navigating Employee Portal Pages” on page 8.

To view the Active Benefits page:

- Click the **Active Benefits** link.

Figure 7-3. Active Benefits page

Plan	Amount	Percent	Amount YTD	Start Date	End Date
BCBS DIST PD - BCBS	257.00		1,028.00		
LI TISD PD LF	1.15		4.60		
TREC Entity Contribution		0.55	26.88	09/01/2003	
WCA DIST PD - WRK CMP		0.38	18.56		

Viewing All Benefits

Use the All Benefits page to view the current, future and expired benefit package enrollments. Future benefit package enrollments have a start date that begins in the future. Previously enrolled benefit packages have an end date.

NOTE: See the sorting and page navigation methods in “Navigating Employee Portal Pages” on page 8.

To view the All Benefits page:

- Click the **All Benefits** link.

Figure 7-4. All Benefits page

Plan	Amount	Percent	Amount YTD	Start Date	End Date
BCBS DIST PD - BCBS	257.00		1,028.00		
DEN DIST PD- DENTAL - SINGLE	24.96				07/31/2006
LI TISD PD LF	1.15		4.60		
MED DIST PD - MED REIMB	157.04			09/01/2005	08/31/2006
TREC Entity Contribution		0.55	26.88	09/01/2003	
WCA DIST PD- WRK CMP		0.38	18.56		

Submitting a Request

Submitting a General Information Request

Follow these steps to submit a request to change your contact information in your electronic personnel file.

To submit the request:

1. On the **Self Serve** tab, click the **Make A Request** link. The **Make a Request** page appears (see Figure 1-2 on page 3).
2. Click the **Demographics** link. The **Demographic Request** page appears with the **General** tab selected.

Tip: Any field with a gray background is protected information and cannot be changed.

Note: The message displayed at the bottom of the page is entered by the administrator. This message may change so it is important to read the message each time you make a request.

Figure 2-5. Demographic Request page

The screenshot shows the 'Demographic Request' page with the 'General' tab selected. The form contains the following fields and options:

- Name Fields:** * First Name (kimberly), Middle Name (J), * Last Name (Hanson), Generation (dropdown menu).
- Address Fields:** * Address 1 (10626 LORWOOD DR), Address 2, Address 3.
- City, State, Zip Code:** * City (Wyomissing), * State (PA), * Zip Code (19612-5546).
- Phone Fields:** Home Phone (2155555696), Mobile Phone, Office Phone (112225696), Extension.
- Comments:** A text area for entering comments.
- Email Notification Options:**
 - Email me each step of the approval process.
 - Email me only on the final step of the approval process.
 - Do not email me about this request.
- Buttons:** Submit, Cancel.

At the bottom of the form, there is a message: "Verify the information is correct."

3. Make the necessary changes to the data entry fields.

Tip: A red asterisk (*) identifies required fields. Press **Tab** to move from one field to another.

Submitting a Request

- Click to select one of the following options:
 - Email me each step of the approval process** option to receive an e-mail notification each time the request is approved.
 - Email me only on the final step of the approval process** option to receive an e-mail notification only when your request receives final approval.
 - Do not email me about this request** option to not receive any e-mail notification about the approval status of your request.
- Click **Submit** to submit the request for approval.

Submitting a Dependent Request

Use this procedure to submit a request to add a new dependent record, update an existing dependent record, or delete a dependent record.

To submit a request to add a dependent:

- On the **Self Serve** tab, click the **Make A Request** link. The **Make a Request** page appears (see Figure 1-2 on page 3).
- Click the **Demographics** link. The **Demographic Request** page appears.
- Click the **Dependents** tab.

Tip: If applicable, a list of current dependents displays at the top of the page.

Figure 2-6. Demographic Request page, Dependents tab

Demographic Request

Self Serve Requests > Demographic Request

General Dependents Emergency Contacts

+ Add New

Name	SS#	Birth Date	Relationship	Phone Number	Address	Edit
Marcus Hanson	***-**-9488		Husband		10626 LORWOOD DR Wyomissing, pa 19612	
Luke Hanson	***--8372	06/05/2006	Son		10626 LORWOOD DR Wyomissing, pa 19612	

Verify the information is correct.

Submitting a Request

- Click the **Add New** button to display the form used to request the addition of a dependent.

Note: The message displayed at the bottom of the page is entered by the administrator. This message may change so it is important to read the message each time you make a request.

Figure 2-7. Dependents tab after clicking the Add New button

Demographic Request

Self Serve Requests > Demographic Request

General Dependents Emergency Contacts

+ Add New

Name	SS#	Birth Date	Relationship	Phone Number	Address	Edit
There is no dependent information on file.						

Use the form below to request a new dependent.

* Required Information

* First Name: * Last Name:

* Social Security Number: * Birth Date: * Relationship:

Numeric values only. Format mm/dd/yyyy

* Phone Number: * Address 1: Address 2:

Numeric values only

* City: * State: * Zip Code:

Comments

Email me each step of the approval process.
 Email me only on the final step of the approval process.
 Do not email me about this request.

Submit Cancel

Please check your dependents to make sure the information in accurate.

- Complete the fields marked with a red asterisk (*) and any optional fields necessary.
Tip: Press **Tab** to move from one field to another.
- Click to select one of the following options:
 - Email me each step of the approval process** option to receive an e-mail notification each time the request is approved.
 - Email me only on the final step of the approval process** option to receive an e-mail notification only when your request receives final approval.
 - Do not email me about this request** option to not receive any e-mail notification about the approval status of your request.
- Click **Submit** to submit the request for approval.
Click **Cancel** to cancel the request.

Submitting a Request

To submit a request to change or delete a dependent record:

1. On the **Dependents** tab, click the **Edit** button that corresponds to the record you want to update or delete. The details for the dependent selected display.
2. Make the necessary changes or click to select the **Delete this dependent** check box to delete the dependent record.
Tip: A red asterisk (*) identifies required fields. Press **Tab** to move from one field to another.
3. Click to select one of the following options:
 - **Email me each step of the approval process** option to receive an e-mail notification each time the request is approved.
 - **Email me only on the final step of the approval process** option to receive an e-mail notification only when your request receives final approval.
 - **Do not email me about this request** option to not receive any e-mail notification about the approval status of your request.
4. Click **Submit** to submit the request for approval.
Click **Cancel** to cancel the request.

Submitting an Emergency Contact Request

Use this procedure to submit a request to add a new emergency contact, update an existing emergency contact record, or delete a emergency contact record.

To submit a request to add an emergency contact:

1. On the **Self Serve** tab, click the **Make A Request** link. The **Make a Request** page appears (see Figure 1-2 on page 3).
2. Click the **Demographics** link. The **Demographic Request** page appears.
3. Click the **Emergency Contacts** tab.

Tip: If applicable, a list of current emergency contacts displays at the top of the page.

Figure 2-8. Demographic Request page, Emergency Contract tab



Demographic Request

Self Serve Requests > Demographic Request

Name	Relationship	Address	Phone 1	Phone 2	Edit
MARCUS	HANSON	10626 LORWOOD DR WYOMISSING, PA 19610-1234	(111)222-3333		

Verify the information is correct.

Submitting a Request

- Click the **Add New** button to display the form used to request the addition of an emergency contact.

Note: The message displayed at the bottom of the page is entered by the administrator. This message may change so it is important to read the message each time you make a request.

Figure 2-9. Emergency Contacts tab after clicking the Add New button

Self Serve Requests > Demographic Request

General Dependents Emergency Contacts

[Add New](#)

Name	Relationship	Address	Phone 1	Phone 2	Edit
MARCUS	HANSON	10626 LORWOOD DR WYOMISSING, PA 19610-1234	(111)222-3333		

i Use the form below to request a new emergency contact.

* Required Information

* Name: * Relationship: * Address:
* City: * State: * Zip Code:
* Phone 1: Phone 2:

Numeric values only

Comments

Email me each step of the approval process.
 Email me only on the final step of the approval process.
 Do not email me about this request.

Verify the information is correct.

- Complete the fields marked with a red asterisk (*) and any optional fields necessary.
Tip: Press **Tab** to move from one field to another.
- Click to select one of the following options:
 - Email me each step of the approval process** option to receive an e-mail notification each time the request is approved.
 - Email me only on the final step of the approval process** option to receive an e-mail notification only when your request receives final approval.
 - Do not email me about this request** option to not receive any e-mail notification about the approval status of your request.
- Click **Submit** to submit the request for approval.
Click **Cancel** to cancel the request.