

# I. Introduction to Employee Self-Service (ESS) and My First Days

## **General Information**

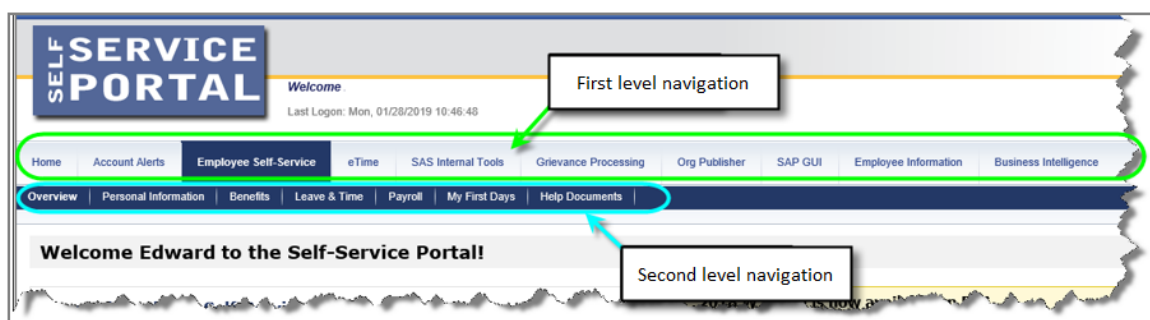
Employee Self-Service (ESS) is a web-based service within the Self-Service Portal that provides employees with the ability to view and update information related to their employment with the Pennsylvania State System of Higher Education (PASSHE).

ESS contains the application, My First Days. My First Days allows employees to add and update personal information such as Dependent(s), W-4 Tax Withholding Information, Education, Ethnicity, Direct Deposit and Emergency contact. It also allows employees to enroll into benefit plans such as Medical, Retirement, Flexible Spending Account(s) and Basic Group Life.

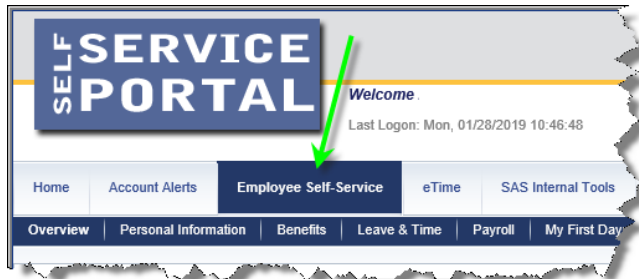
Employees should contact their Human Resources Office immediately with any questions regarding the information appearing on ESS.

## II. Overview of Self-Service Portal Navigation

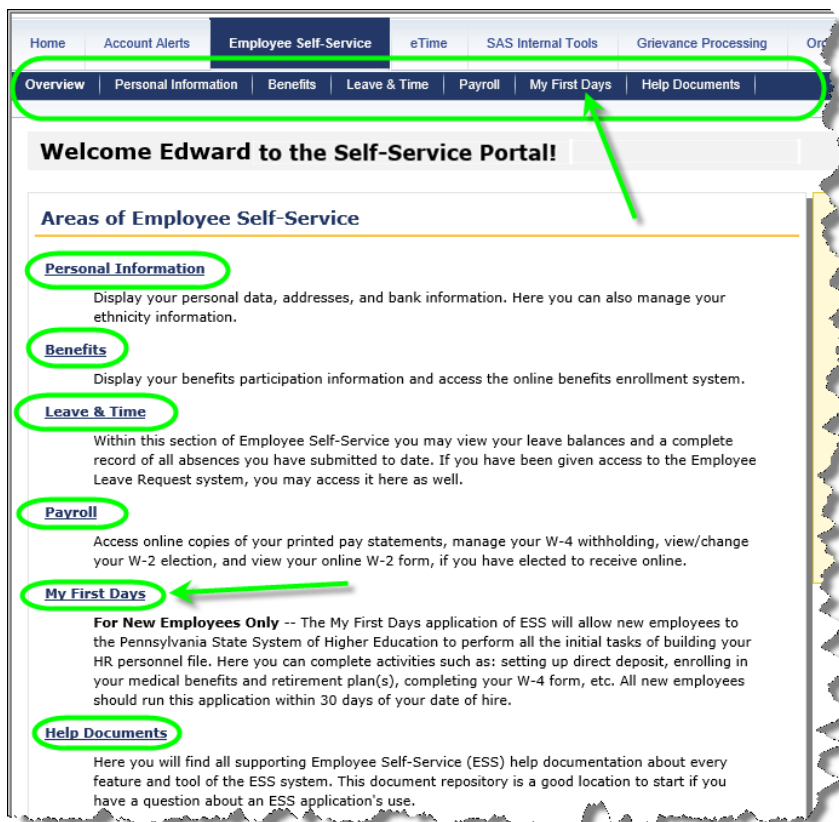
1. The **first level navigation tabs** will only display the applications to which the Username in effect has access and may vary. When a first level navigation tab is selected, the **second level navigation links** will refresh to show what options are available for use under the selected first level navigation tab.



1. To access My First Days, select **Employee Self-Service** (ESS) from the first level navigation tab.



2. The window will display a listing of the *ESS* applications available. Navigation to the desired *ESS* application can be accomplished either by using the second level navigation links under *ESS* or by the optional navigation links depicted in the screenshot below. Select the **My First Days** link from either of the provided navigational options.

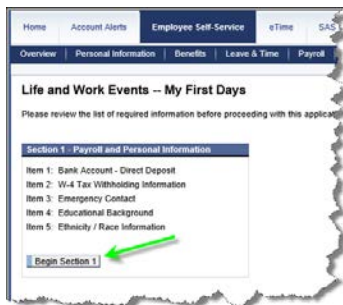


3. On the first page of *My First Days*, select ***Begin the My First Days Application***.

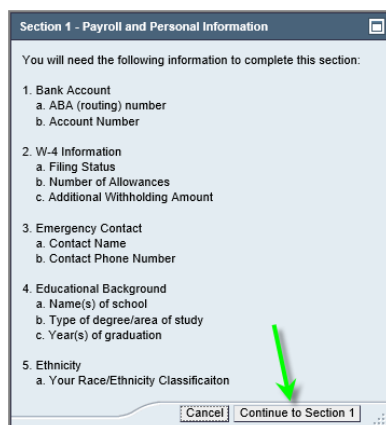


### III. Navigating ESS and My First Days: Section 1 – Payroll and Personal Information

1. To begin the ***Payroll and Personal Information*** process within *My First Days*, select ***Begin Section 1***.



2. Instructions for completing the section will be displayed. Select ***Continue to Section 1*** to begin.



- Bank Account Information** will be the first page displayed under *Payroll and Personal Information*. If direct deposit is desired, the following must be provided:
  - Bank ABA Routing Number**
  - Account Number**
  - Account Type** (*Checking or Savings*)
- To proceed with setting up direct deposit, select **Create/Change Bank Information**.

Home Account Alerts **Employee Self-Service** eTime SAS Internal Tools Grievance Processing Org Publish

Overview Personal Information Benefits Leave & Time Payroll **My First Days** Help Documents

**Life and Work Events -- My First Days**  
**Bank Account Information**

To update your bank information, start by clicking the "Create / Change Bank Information" button. Then make any changes to your bank account.

**Stored Bank Account Information**

Bank ABA/Routing Number:

Account Number:

Account Type:

Bank account changes made today will be reflected with the 02/15/2019 pay date.

⚠ You currently do not have a stored bank account. If you wish to utilize direct deposit, you must enter an account here.

**NOTE:** If entering/modifying bank account information is not desired, select **Continue to Next Step** to bypass as shown below. **However, it is STRONGLY recommended that all employees utilize direct deposit.** The benefits of utilizing direct deposit are speed, accuracy, and privacy. Paper checks should **ONLY** be requested as a last resort.

- Once bank account details have been completely entered, select **Save Account and Continue**.

**Life and Work Events -- My First Days**  
**Bank Account Information**

To update your bank information, start by clicking the "Create / Change Bank Information" button. Then make any changes to your

**Stored Bank Account Information**

Bank ABA/Routing Number:

Account Number:

Verify Account Number:

Account Type:

Bank account changes made today will be reflected with the 02/15/2019 pay date.

**YOUR NAME** 0000 1026  
 123 Your St. 99-9999 XX  
 Your Town, CA 12345 999

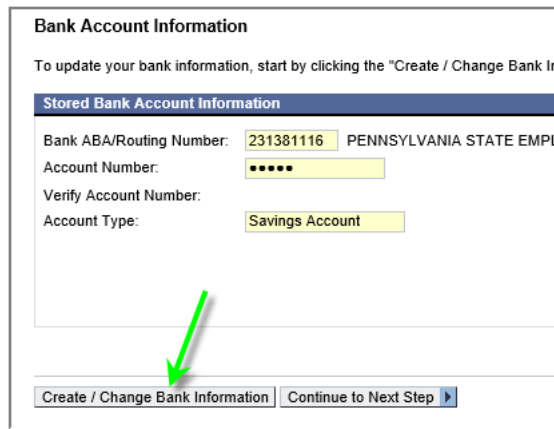
Pay to the Order of \_\_\_\_\_ \$ \_\_\_\_\_  
 DOLLARS

**YourBank**

For \_\_\_\_\_  
 123456789 123456789101 1026

ABA or Bank Routing Number Bank Account Number Check Number

NOTE: If a bank account currently exists in the system, select **Create/Change Bank Information**.



**Bank Account Information**

To update your bank information, start by clicking the "Create / Change Bank Information" button.

**Stored Bank Account Information**

Bank ABA/Routing Number: 231381116 PENNSYLVANIA STATE EMPLOYER

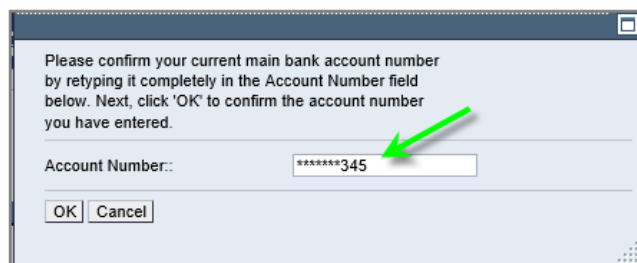
Account Number: \*\*\*\*\*

Verify Account Number: \*\*\*\*\*

Account Type: Savings Account

Create / Change Bank Information Continue to Next Step

The following pop-up screen will appear showing the last three digits of the account number on file.

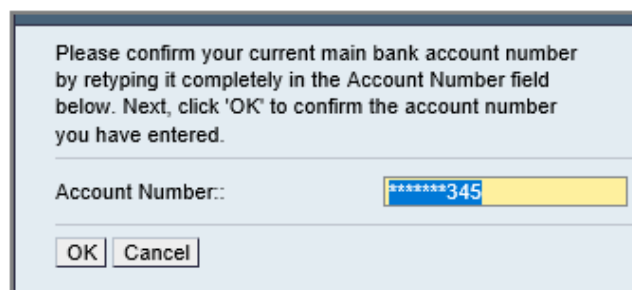


Please confirm your current main bank account number by retying it completely in the Account Number field below. Next, click 'OK' to confirm the account number you have entered.

Account Number: \*\*\*\*\*345

OK Cancel

Highlight the masked entry entirely within the Account Number field.

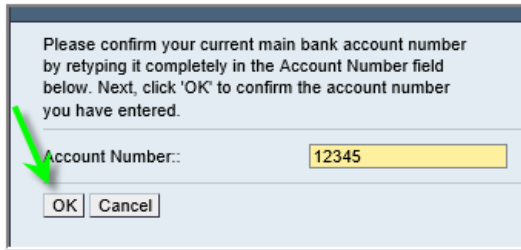


Please confirm your current main bank account number by retying it completely in the Account Number field below. Next, click 'OK' to confirm the account number you have entered.

Account Number: \*\*\*\*\*345

OK Cancel

Enter the corresponding account number completely and select **OK**. This will unlock the bank account on file for changes.



Please confirm your current main bank account number by retyping it completely in the Account Number field below. Next, click 'OK' to confirm the account number you have entered.

Account Number:



**Bank Account Information**

To update your bank information, start by clicking the "Create / Change Bank Information" button

**Stored Bank Account Information**

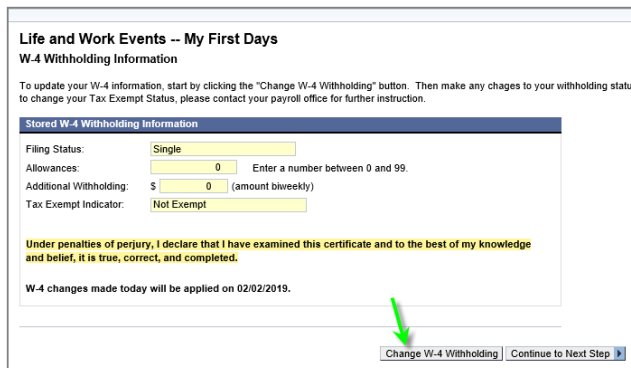
Bank ABA/Routing Number:  PENNSYLVANIA STATE EMPLOYEES CU

Account Number:

Verify Account Number:

Account Type:

- The *W-4 Withholding Information* page is next in the entry process. To proceed with setting up *W-4 Withholding Information*, select **Change W-4 Withholding**.



**Life and Work Events -- My First Days**

**W-4 Withholding Information**

To update your W-4 information, start by clicking the "Change W-4 Withholding" button. Then make any changes to your withholding status to change your Tax Exempt Status, please contact your payroll office for further instruction.

**Stored W-4 Withholding Information**

Filing Status:

Allowances:  Enter a number between 0 and 99.

Additional Withholding: \$  (amount biweekly)

Tax Exempt Indicator:

**Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and completed.**

W-4 changes made today will be applied on 02/02/2019.

5. The following screen will appear when no W-4 withholding information is on file. Simply choose a Filing Status by utilizing the drop-down box. This screen also allows for the entry of Allowances and Additional Withholding if desired. When finished, select **Save and Continue to Next Step**.

**Life and Work Events -- My First Days**  
**W-4 Withholding Information**

To update your W-4 information, start by clicking the "Change W-4 Withholding" button. Then make any changes to your withholding to change your Tax Exempt Status, please contact your payroll office for further instruction.

**Stored W-4 Withholding Information**

Filing Status:

Allowances:  Enter a number between 0 and 99.

Additional Withholding: \$  (amount biweekly)

Tax Exempt Indicator:

**Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and completed.**

W-4 changes made today will be applied on 02/02/2019.

[Save and Continue to Next Step](#)

NOTE: If W-4 withholding information is already on file, the following screen will appear. If changes are desired, select **Change W-4 Withholding**. This will open the fields for editing. Follow step 5 above. Otherwise, if no changes are desired, select **Continue to Next Step**.

**W-4 Withholding Information**

If entering W-4 information for the first time, simply enter the information and select "Save and Continue to Next Step". To update previously saved W-4 information, start by clicking the "Change W-4 Withholding" button. Then make any changes.

**Stored W-4 Withholding Information**

Filing Status:

Allowances:  Enter a number between 0 and 99.

Additional Withholding: \$  (amount biweekly)

Tax Exempt Indicator:

**Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and completed.**

W-4 changes made today will be applied on 01/19/2019.

[Change W-4 Withholding](#) [Continue to Next Step](#)

6. The **Emergency Contact Information** page is next in the entry process. To proceed with setting up an emergency contact, select **Add an Emergency Contact**. (NOTE: To skip this step, select **Skip This Step**).

**Life and Work Events -- My First Days**  
Emergency Contact Information

On this screen you will have the ability to enter information for your designated contact person in the case of an emergency. If you do not have an emergency contact, click the "Add an Emergency Contact" button and enter the information about your contact. Once you have entered all required information, click the "Save Changes" button to save the information. If you need to update your contact's information, click the "Change Emergency Contact Information" button, make any necessary changes and click the "Save Changes" button.

**Stored Emergency Contact Data**

Name:   
Country:   
Street:   
City:   
State:  Postal Code:

Home Phone:   Primary Contact  Unlisted Number  
Mobile Phone:    
Work Phone:  ext.

[Add an Emergency Contact](#) [Skip This Step](#)

7. If adding an emergency contact, completing all fields designated with a red asterisk (\*) is required. Once data entry is complete, select **Save Changes**.

**Stored Emergency Contact Data**

Name: \*   
Country:   
Street:   
City:   
State:  Postal Code:

Please enter all numbers in the format 123-456-7890

Home Phone:   Primary Contact  Unlisted Number  
Mobile Phone:    
Work Phone:  ext.

[Cancel Changes](#) [Save Changes](#)

8. A confirmation message will appear stating that the contact information has been saved successfully. Select **Continue to the Next Step**.

[Change Emergency Contact Information](#) [Continue to the Next Step](#)

Your emergency contact information has been saved successfully.



9. The **Educational Background** page is next in the entry process. To proceed with setting up **Educational Background**, select **Add New Educational Institution**. (NOTE: If no changes/additions are desired, select **Continue to Next Step**).

**Life and Work Events -- My First Days**  
Educational Background

This page will allow you to store a history of your educational background.

- You can add new entries by clicking the "Add New Educational Institution" button.
- If educational information already exists, you can view the record by selecting a row from the "Saved Educational Institutions" table.
- You can edit existing records by selecting the row and clicking on the "Edit Educational Institution" button. Then you can edit the necessary information.

10. The following **Educational Information** screen will appear. Complete all of the required information as indicated by the red asterisk (\*) and then select on **Save Educational Institution**. To cancel data entry, select **Cancel Changes**.

**Educational Information -- Please complete all fields marked with an \***

Country: \*

State: \*

Educational Est.: \*

Institution: \*

Degree: \*  Graduation Year: \*

Degree Description: \*

Branch of Study: \*

Program of Study:

Additional Information:

11. If saved successfully, the following message will appear within the **Educational Background** page. Repeat this process if adding more educational background is desired. If finished, select **Continue to Next Step**.

Stored Educational Institutions				
Educational Est.	Institution	Degree	Year	Program of Study
Post-Secondary	Indiana University of Pennsylvania	Bachelor Degree	2000	Agricultural Business Technology

Select a row from the table above to view details about the education record.

Your new educational institution has been saved to the system.

**NOTE:** If there is a pre-existing *Educational Background* entry on record, a screen similar to the one below will display. There will be a **Stored Educational Institutions** section with a list of previously entered educational background information.

Stored Educational Institutions				
Educational Est.	Institution	Degree	Year	Program of Study
Post-Secondary	Indiana University of Pennsylvania	Bachelor Degree	2000	Architecture

Select a row from the table above to view details about the education record.

**NOTE (cont.):** To see details of **Stored Educational Institutions**, select the desired row. The screen will expand as shown below. To make changes, select **Edit Educational Institution** and make the desired change(s).

Home | Employee Self-Service | Financial Aid Office

Overview | Personal Information | Benefits | Leave & Time | Payroll | My First Days | Help Documents

My First Days | History | Back | Forward

### Life and Work Events -- My First Days

#### Educational Background

This page will allow you to store a history of your educational background.

- You can add new entries by clicking the "Add New Educational Institution" button.
- If educational information already exists, you can view the record by selecting a row from the "Saved Educational Institutions" table.
- You can edit existing records by selecting the row and clicking on the "Edit Educational Institution" button. Then you can edit the necessary information.

Educational Est.	Institution	Degree	Year	Program of Study
Post-Secondary	Indiana University of Pennsylvania	Bachelor Degree	2000	Architecture

Select a row from the table above to view details about the education record.

Educational Information -- Please complete all fields marked with an \*

Country: \* United States

State: \* Pennsylvania

Educational Est.: \* Post-Secondary

Institution: \* Indiana University of Pennsylvania

Degree: \* Bachelor Degree

Graduation Year: \* 2000

Degree Description: \* Bachelor of Science (BS)

Branch of Study: \* Architecture And Related Services

Program of Study: \* Architecture

Additional Information: Test QP1

Click to edit.

Add New Educational Institution | Edit Educational Institution | Continue to Next Step

**NOTE (cont.):** Once edits are complete, select **Save Educational Institution**.

My First Days | History | Back | Forward

### Life and Work Events -- My First Days

#### Educational Background

This page will allow you to store a history of your educational background.

- You can add new entries by clicking the "Add New Educational Institution" button.
- If educational information already exists, you can view the record by selecting a row from the "Saved Educational Institutions" table.
- You can edit existing records by selecting the row and clicking on the "Edit Educational Institution" button. Then you can edit the necessary information.

Educational Est.	Institution	Degree	Year	Program of Study
Post-Secondary	Indiana University of Pennsylvania	Bachelor Degree	2000	Architecture

Select a row from the table above to view details about the education record.

Educational Information -- Please complete all fields marked with an \*

Country: \* United States

State: \* Pennsylvania

Educational Est.: \* Post-Secondary

Institution: \* Indiana University of Pennsylvania

Degree: \* Bachelor Degree

Graduation Year: \* 2000

Degree Description: \* Bachelor of Science (BS)

Branch of Study: \* Architecture And Related Services

Program of Study: \* Architecture

Additional Information: Test QP1

Click here.

Save Educational Institution | Cancel Changes

**NOTE (cont.):** If the degree has already been verified on an employee's personnel education record, the **Edit Educational Institution** button becomes deactivated. A message will appear indicating any desired changes must be made by the HR department.

Home | **Employee Self-Service** | Financial Aid Office

Overview | Personal Information | Benefits | Leave & Time | Payroll | **My First Days** | Help Documents

My First Days | History | Back | Forward

Ed. Inst.	Institution	Degree	Year	Program of Study
<a href="#">Click for details</a>	Indiana University of Pennsylvania	Bachelor Degree	2000	Spanish Language Teacher Education

Select an institution above to view details about the education record.

**Educational Information -- Please complete all fields marked with an \***

Country: \* United States  
 State: \* Pennsylvania  
 Educational Est.: \* Post-Secondary  
 Institution: \* Indiana University of Pennsylvania  
 Degree: \* Bachelor Degree  
 Graduation Year: \* 2000  
 Degree Description: \* Bachelor of Science (BS)  
 Branch of Study: \* Education  
 Program of Study: \* Spanish Language Teacher Education

Additional Information: TEST QP1

This record has been marked as verified on your personnel record. Changes must be made by your HR department. **Indicates degree verified**

**Deactivated button**

Add New Educational Institution | **Edit Educational Institution** | Continue to Next Step

12. The **Ethnicity/Race Information** page is next in the entry process. To proceed with setting up ethnicity/race information, select **Change Ethnicity/Race**. (NOTE: If no changes/additions are desired, select **Continue and Finish Section 1** to skip **Ethnicity/Race Information**. Users will be taken back to the *My First Days* overview screen).

**Life and Work Events -- My First Days**  
 Ethnicity / Race Information

**Stored Ethnicity / Race Information**

Ethnicity/Race categories have changed to reflect more specific choices. Please review the information that is on file for you. Please either confirm the values displayed below or select new values and update your record. If the information displayed below is correct and confirmed, then no action is required.

The status of your record in the system is: **Incomplete or Missing Information**  
 The system currently has your ethnicity as: **Unknown**  
 The system currently has your race as: **Unknown**

⚠ The system does not have complete Ethnicity/Race information on file for you. Please update your records.

[Change Ethnicity/Race](#) | [Continue and Finish Section 1](#)

13. Complete the information as appropriate and select **Save Changes to Ethnicity/Race** to continue. (NOTE: If changes are not desired, click **Cancel**).

**Life and Work Events -- My First Days**  
Ethnicity / Race Information

**Stored Ethnicity / Race Information**

Ethnicity/Race categories have changed to reflect more specific choices. Please review the information that is on file for you. Please either confirm the values displayed below or select new values and update your record. If the information displayed below is correct and confirmed, then no action is required.

The status of your record in the system is: **Incomplete or Missing Information**  
The system currently has your ethnicity as: **Unknown**  
The system currently has your race as: **Unknown**

**1. What is your Ethnicity? (Select One Option)**

**Hispanic or Latino**  
Persons of Cuban, Mexican, Puerto Rican, South or Central American or other Spanish culture or origin, regardless of race.

**Not Hispanic or Latino**

**2. What is your Race? (Select One or More)**

**American Indian or Alaska Native**  
Persons having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment.

**Asian**  
Persons having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.

**Black or African American**  
Persons having origins in any of the black racial groups of Africa.

**Native Hawaiian or Pacific Islander**  
Persons having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific islands.

**White / Caucasian**  
Persons having origins in any of the original peoples of Europe, the Middle East, or North Africa.

14. The following screen will appear as confirmation that the **Ethnicity/Race Information** has been updated. Click **Continue and Finish Section 1**.

**Stored Ethnicity / Race Information**

Ethnicity/Race categories have changed to reflect more specific choices. Please review the information that is on file for you. Please either confirm the values displayed below or select new values and update your record. If the information displayed below is correct and confirmed, then no action is required.

The status of your record in the system is: **Confirmed By Employee**  
The system currently has your ethnicity as: **Not Hispanic or Latino**  
The system currently has your race as: **White/Caucasian**

Thank you for updating your Ethnicity/Race information.

NOTE: If Ethnicity/Race data already exists on file, the following screen will appear instead to indicate the data on file has not been confirmed by the employee.

**Stored Ethnicity / Race Information**

Ethnicity/Race categories have changed to reflect more specific choices. Please review the information that is on confirm the values displayed below or select new values and update your record. If the information displayed below then no action is required.

The status of your record in the system is: **Not Confirmed By Employee**

The system currently has your ethnicity as: **Hispanic or Latino**

The system currently has your race as: **None**

If changes are needed, select the button; **Change Ethnicity/Race** and follow step 13 above.

If changes are not needed, select the button; **Confirm Ethnicity/Race**. The following confirmation message will appear. Select the button; **Continue to Next Step**.

The status of your record in the system is: **Confirmed By Employee**

The system currently has your ethnicity as: **Hispanic or Latino**

The system currently has your race as: **None**

Thank you for confirming your Ethnicity/Race Information.

15. Employees will be taken to the **My First Days** start page, and the following message will appear confirming their entries have been saved.

A confirmation email of the employee's changes will be sent to the email address displayed. It is important that this email confirmation be retained for employee records.

Home Account Alerts **Employee Self-Service** eTime SAS Internal Tools Grievance Processing Org Publisher

Overview Personal Information Benefits Leave & Time Payroll **My First Days** Help Documents

### Life and Work Events -- My First Days

Please review the list of required information before proceeding with this application. You will need all information outlined in the checklist below to complete this application.

#### Section 1 - Payroll and Personal Information

- Item 1: Bank Account - Direct Deposit
- Item 2: W-4 Tax Withholding Information
- Item 3: Emergency Contact
- Item 4: Educational Background
- Item 5: Ethnicity / Race Information

[Begin Section 1](#)

#### Section 2 - Medical and Insurance Plan

- Item 1: Family Member / Dependent / Beneficiary
- Item 2: External Organization Beneficiary Information
- Item 3: Medical Benefit Plan Selection
- Item 4: Basic Group Life, LTD, Voluntary
- Item 5: Flexible Spending Account Enrollment

[Begin Section 2](#)

Thank you for completing section 1. You may proceed with another section, if necessary, or exit the application.

A confirmation email has been sent to: TEST@PASSHE.EDU

16. Access to **Section 1** will be active for 30 days from the first date of employment. After 30 days, access will be closed.