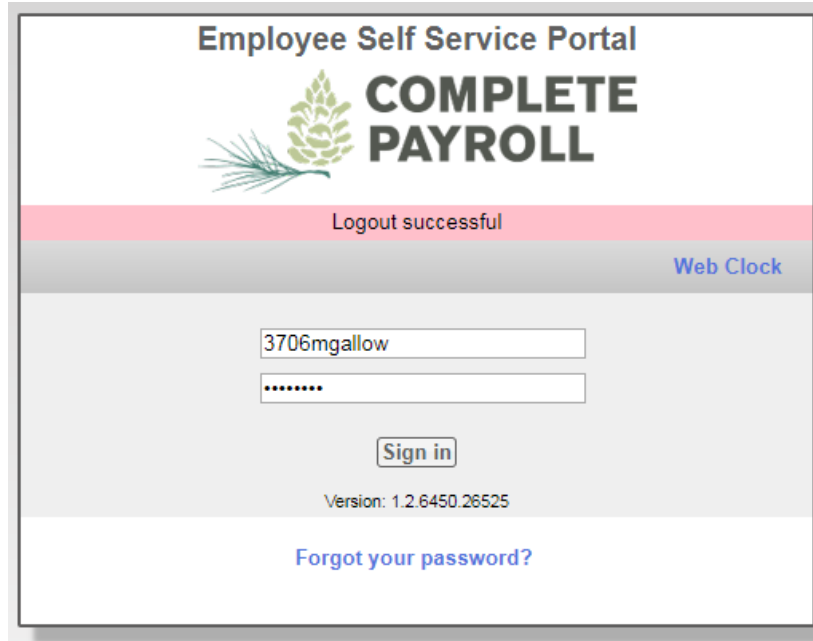


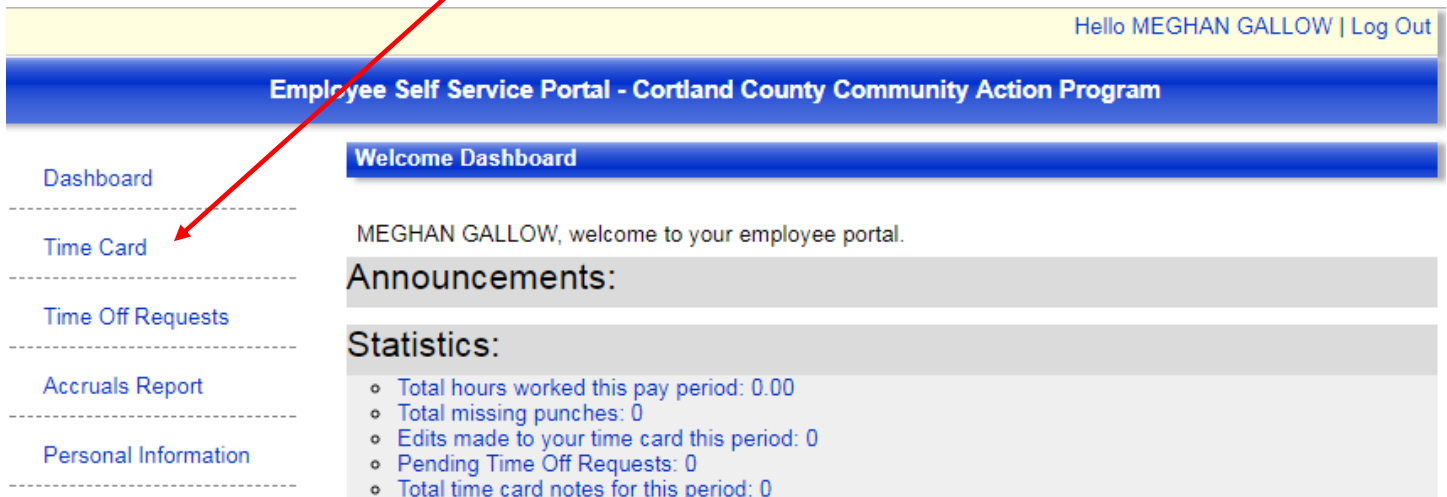
## Procedure: Employee Timecard Entry

### Login to Employee Self Service Portal

- Go to: <https://completepayrollprocessing.payrollservers.us/pg/Ess/Default.aspx>
- Enter Login ID and Password
  - Login ID is *3706 employee first initial last name*
    - In this example Meghan Gallow ID is *3706mgallow*



- This opens the Employee Dashboard
- To enter your time Click on Time Card



## CAPCO TRAINING MATERIAL for Complete Payroll Self Service Portal

- The Time Card for the current pay period opens
- To Enter Time – In the Edit column click on the ADD button

< Previous Pay Period | Next Pay Period >

Time Card Options ▾

Date	Edit	In	Out	Deducted Time	Category	Hours	Activity Code	Dept/Program	Funding Source	Title/Position
Sat 8/19		-	-	-	-	-	-	-	-	-
Sun 8/20		-	-	-	-	-	-	-	-	-
Mon 8/21		-	-	-	-	-	-	-	-	-
Tue 8/22		-	-	-	-	-	-	-	-	-
Wed 8/23		-	-	-	-	-	-	-	-	-
Thu 8/24		-	-	-	-	-	-	-	-	-
Fri 8/25		-	-	-	-	-	-	-	-	-
Total hours clocked for week of 8/19 to 8/25: 0.00										
Sat 8/26		-	-	-	-	-	-	-	-	-
Sun 8/27		-	-	-	-	-	-	-	-	-
Mon 8/28		-	-	-	-	-	-	-	-	-
Tue 8/29		-	-	-	-	-	-	-	-	-
Wed 8/30		-	-	-	-	-	-	-	-	-
Thu 8/31		-	-	-	-	-	-	-	-	-
Fri 9/1		-	-	-	-	-	-	-	-	-
Total hours clocked for week of 8/26 to 9/1: 0.00										
<b>Totals</b>						0.00	-	-	-	-

- Enter information in the columns: **Category** (defaults to Regular) – **Hours** – **Activity Code** – **Dept/Program** and **Funding Source**

**NOTE: Entering In and Out times is not required.**

< Previous Pay Period | Next Pay Period >

Time Card Options ▾

Date	Edit	In	Out	Deducted Time	Category	Hours	Activity Code	Dept/Program	Funding Source
Sat 8/19		-	-	-	-	-	-	-	-
Sun 8/20		-	-	-	-	-	-	-	-
Mon 8/21	Cancel Save	<input type="text"/>	<input type="text"/>	<input type="text"/>	Regular	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Tue 8/22		-	-	-	-	-	-	-	-
Wed 8/23		-	-	-	-	-	-	-	-

Comments about this edit:  
(Comments appear only in edit history)

- In this example we entered *Regular, 7.5, Program Operations, WIC/WIC and 16.17WIC*

- When information for the day has been entered click on the Save button, or hit the enter key on the keyboard

Date	Edit	In	Out	Deducted Time	Category	Hours	Activity Code	Dept/Program	Funding Source
Sat 8/19		-	-	-	-	-	-	-	-
Sun 8/20		-	-	-	-	-	-	-	-
Mon 8/21	Cancel Save	<input type="text"/>	<input type="text"/>	<input type="text"/>	Regular	7.5	Program Operations	WIC/WIC	16.17WIC
Tue 8/22		-	-	-	-	-	-	-	-
Wed 8/23		-	-	-	-	-	-	-	-

Comments about this edit:  
(Comments appear only in edit history)

**NOTE:** When selecting **Vacation** time only enter # of hours then save. The Dept/Program and Funding Source will auto-populate with MAG/MAG NONE.

## CAPCO TRAINING MATERIAL for Complete Payroll Self Service Portal

Category	Hours	Amount	Activity Code	Dept/Program	Funding Source
Vacation	7.50			MAG/MAG	NONE

- To Enter Time when employee needs to split their time between Category, Activity Code, Dept/Program, or Funding Source
  - Click on the Add button to continue entering lines for the same day

Tue 8/22		<input type="button" value="Edit"/> <input type="button" value="Add"/>	-	-	-	3.00	↓		Training	WIC/WIC	16.17WIC
		<input type="button" value="Edit"/> <input type="button" value="Add"/>	-	-	-	3.50	↓		Program Operations	WIC/WIC	16.17WIC
		<input type="button" value="Edit"/> <input type="button" value="Add"/>	-	-	Personal	1.00	7.50		Program Operations	WIC/WIC	16.17WIC

- To Enter Mileage for Reimbursement:
  - After time is entered / saved for the day, Click on the Add button
  - Select Mileage in Category – Enter # of miles in Amount – Activity Code – Dept/Program and Funding Source

Mon 8/21		<input type="button" value="Cancel"/> <input type="button" value="Save"/> <input type="button" value="Delete"/>	-	-	-	7.50			Program Operations	WIC/WIC	16.17WIC
					Mileage	<input type="text" value="7.5"/>			Program Operations	WIC/WIC	16.17WIC

- Save
  - Note: once line is saved # of miles changes to \$ to reimburse Under Category select Mileage
- When entering Mileage employee must Enter a Note:
  - To Add a note click on the Pencil Icon

Mon 8/21		<input type="button" value="Edit"/> <input type="button" value="Add"/>	-	-	-	7.50	↓		Program Operations	WIC/WIC	16.17WIC
		<input type="button" value="Edit"/> <input type="button" value="Add"/>	-	-	Mileage	7.50		<input type="text" value="\$5.35"/>	Program Operations	WIC/WIC	16.17WIC

- This opens the Notes window: Enter date, # miles, to/from information
- In the Notes window Click on Save button

Date	Edit	In	Out	Deducted Time	Category	Hours	Hrs/day	Amount	Activity Code	Dept/Program	Funding Source
Sat 8/19		-	-	-	-	-	-	-	-	-	-
Sun 8/20		-	-	-	-	-	-	-	-	-	-
Mon 8/21		-	-	-	-	7.50	↓		Program Operations	WIC/WIC	16.17WIC
		-	-	-	Mileage	7.50		\$5.35	Program Operations	WIC/WIC	16.17WIC
Tue 8/22		-	-	-	-	-	-	-	-	-	-
Wed 8/23		-	-	-	-	-	-	-	-	-	-
Thu 8/24		-	-	-	-	-	-	-	-	-	-
Fri 8/25		-	-	-	-	-	-	-	-	-	-
Sat 8/26		-	-	-	-	-	-	-	-	-	-
Sun 8/27		-	-	-	-	-	-	-	-	-	-
Mon 8/28		-	-	-	-	-	-	-	-	-	-
Tue 8/29		-	-	-	-	-	-	-	-	-	-
Wed 8/30		-	-	-	-	-	-	-	-	-	-
Thu 8/31		-	-	-	-	-	-	-	-	-	-
Fri 9/1		-	-	-	-	-	-	-	-	-	-

**Notes**

8/21/2017 Cortland/Marathon/Cortland 7.5 miles

(Maximum characters: 4000)  
You have 3953 characters remaining.

- Note is displayed on the last line for that day

Mon 8/21		<input type="button" value="Edit"/> <input type="button" value="Add"/>	-	-	-	7.50	↓		Program Operations	WIC/WIC	16.17WIC
		<input type="button" value="Edit"/> <input type="button" value="Add"/>	-	-	Mileage	7.50		\$5.35	Program Operations	WIC/WIC	16.17WIC
			8/21/2017 Cortland/Marathon/Cortland 7.5 miles								

## CAPCO TRAINING MATERIAL for Complete Payroll Self Service Portal

- **Reviewing / Approving your time card**
  - After completing your timecard review that all data is correct
    - Note: At the bottom right of your timecard is Total of Hours by Category.
  - After verifying all information is correct you need to approve your timecard.

View a pay period by date: 8/19/2017 (GO)

< Previous Pay Period | Next Pay Period >

Time Card Options ▾

Date	Edit	In	Out	Deducted Time	Category	Hours	Hrs/day	Amount	Activity Code	Dept/Program	Funding Source	Title
Sat 8/19	Add	-	-	-	-	-	-	-	-	-	-	-
Sun 8/20	Add	-	-	-	-	-	-	-	-	-	-	-
Mon 8/21	Edit   Add	-	-	-	-	7.50	↓		Program Operations	WIC/WIC	16.17WIC	
	Edit   Add	-	-	-	Mileage			\$4.013	Program Operations	WIC/WIC	16.17WIC	
8/21/2017 Cortland/Marathon/Cortland 7.5 miles												
Tue 8/22	Edit   Add	-	-	-		3.00	↓		Training	WIC/WIC	16.17WIC	
	Edit   Add	-	-	-		3.50	↓		Program Operations	WIC/WIC	16.17WIC	
	Edit   Add	-	-	-	Personal	1.00	7.50		Program Operations	WIC/WIC	16.17WIC	
Wed 8/23	Edit   Add	-	-	-		7.50	7.50		Program Operations	WIC/WIC	16.17WIC	
Thu 8/24	Edit   Add	-	-	-		7.50	7.50		Clinic	WIC/WIC	16.17WIC	
Fri 8/25	Edit   Add	-	-	-	Personal	7.50	7.50		Program Operations	WIC/WIC	16.17WIC	
Total hours clocked for week of 8/19 to 8/25: 29.00 (plus 8.50 not considered for OT)												
Sat 8/26	Add	-	-	-	-	-	-	-	-	-	-	-
Sun 8/27	Add	-	-	-	-	-	-	-	-	-	-	-
Mon 8/28	Edit   Add	-	-	-		7.50	7.50		Program Operations	WIC/WIC	16.17WIC	
Tue 8/29	Edit   Add	-	-	-		7.50	7.50		Program Operations	WIC/WIC	16.17WIC	
Wed 8/30	Edit   Add	-	-	-		7.50	7.50		Program Operations	WIC/WIC	16.17WIC	
Thu 8/31	Edit   Add	-	-	-		7.50	7.50		Clinic	WIC/WIC	16.17WIC	
Fri 9/1	Edit   Add	-	-	-		7.50	7.50		Program Operations	WIC/WIC	16.17WIC	
Total hours clocked for week of 8/26 to 9/1: 37.50												
<b>Totals</b>						75.00	75.00	\$4,013	-			

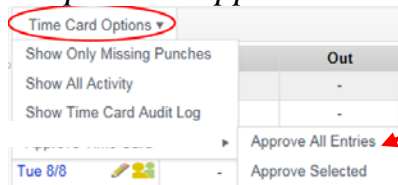
HOURS	
Total Regular hours	66.50
Total Personal hours	8.50
Total Mileage hours	0.00
<b>TOTALS</b>	<b>75.00</b>

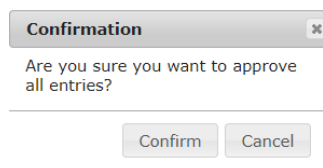
	Accrual balances as of 9/1/2017	Planned Time Off	Balance including planned time as of 9/1/2017
PERSONAL	13.46 hours	0.00 hours	13.46 hours
SICK	121.74 hours	0.00 hours	121.74 hours
VACATION	10.12 hours	0.00 hours	10.12 hours

Note: The balance including planned time does not account for future time accrued.

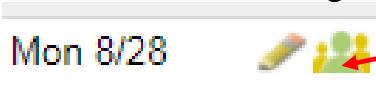
- To Approve your Timecard in the upper left of the timecard
  - click on *Time Card Options* → *Approve Time Card* → *Approve All Entries*



- Click **Confirm** when prompted, “Are you sure...”



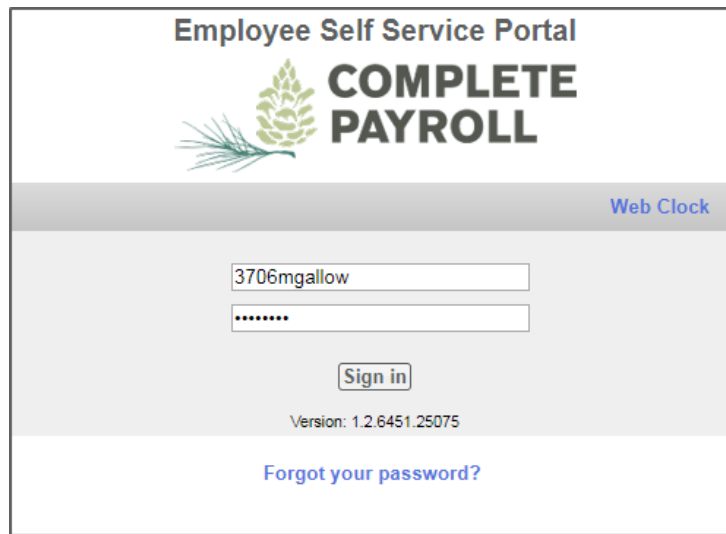
- When approved the Person Icon changes from yellow to **green**.



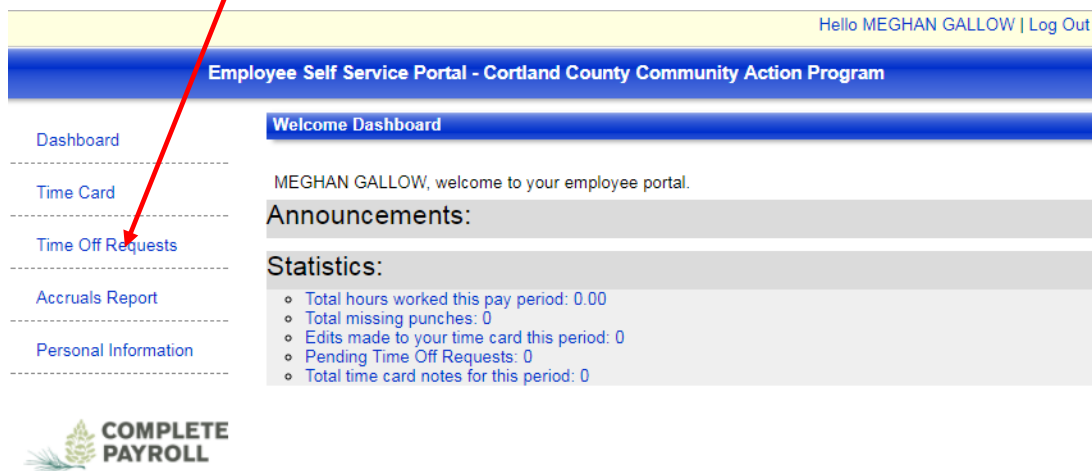
## Procedure: Employee Requesting Time Off

### Login to Employee Self Service Portal

- Go to:  
<https://completepayrollprocessing.payrollservers.us/pg/Ess/Default.aspx>
- Enter Login ID and Password
  - Login ID is 3706 employee first initial last name
    - In this example Meghan Gallow ID is 3706mgallow



- This opens the Employee Dashboard
- Click on **Time Off Requests**



## CAPCO TRAINING MATERIAL for Complete Payroll Self Service Portal

- Click on **Add New Time Off Request**



- Verify enough time off is available  
Note: Run the Accruals Report to view future time accruals

Type	Accrual balances as of 9/1/2017	Planned Time Off	Balance including planned time as of 9/1/2017
PERSONAL	13.46 hours	0 hours	13.46 hours
SICK	121.74 hours	0 hours	121.74 hours
VACATION	10.12 hours	0 hours	10.12 hours

Note: The balance including planned time does not account for future time accrued.

Category: Sick

Single Day

Date:

Hours:

Multiple Days

Partial Day - Times

Description:

The following people will receive a notification of this time off request

- Kirsten Parker

(Optional) Send an email notification to the following managers

Melinda Smith

- In Category select appropriate time from drop down list.
  - Sick, Vacation, Personal and Unpaid Leave
    - *In this example we have selected Sick*

## CAPCO TRAINING MATERIAL for Complete Payroll Self Service Portal

- **To request a Full Day:**
  - Click on **Single Day**
  - Enter Date
  - Enter Total Number of Hours

A screenshot of a web form for requesting time off. The 'Category' dropdown is set to 'Sick'. The 'Single Day' radio button is selected. The 'Date' field contains '08/31/2017' and the 'Hours' field contains '7.5'. The 'Multiple Days' and 'Partial Day - Times' radio buttons are unselected.

- **To request Multiple Days:**
  - Click on **Multiple Days**
  - Enter Start Date and End Date
  - Enter Total Number of Hours per day

A screenshot of a web form for requesting time off. The 'Category' dropdown is set to 'Vacation'. The 'Multiple Days' radio button is selected. The 'Start Date' field contains '09/12/2017' and the 'End Date' field contains '09/14/2017'. Below these are three rows of date and hour inputs: '1. Tue Sep 12 2017' with '7.5', '2. Wed Sep 13 2017' with '7.5', and '3. Thu Sep 14 2017' with '7.5'. The 'Single Day' and 'Partial Day - Times' radio buttons are unselected.

- **To request Less Than a Full Day:**
  - Click on **Partial Day - Times**
  - Enter Date
  - Enter Time From and To (include AM or PM\_

A screenshot of a web form for requesting time off. The 'Category' dropdown is set to 'Personal'. The 'Partial Day - Times' radio button is selected. The 'Date' field contains '09/26/2017', the 'From' field contains '8:00AM', and the 'To' field contains '10:00AM'. The 'Single Day' and 'Multiple Days' radio buttons are unselected.

- Enter a brief **Description** of time off requested (not required)

A screenshot of a text area labeled 'Description'. The text inside reads: 'The supervisor will see any information entered here.'

## CAPCO TRAINING MATERIAL for Complete Payroll Self Service Portal

- To Submit the Request – Click on **Save Request** button

Category: Personal

Single Day

Multiple Days

Partial Day - Times

Date: 09/26/2017

From: 8:00AM

To: 10:00AM

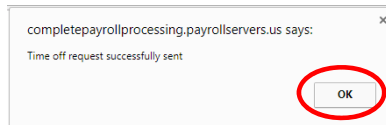
Description: The supervisor will see any information entered here.

The following people will receive a notification of this time off request:

- Kirsten Parker

**Save Request**

- Click OK when prompted, “*Time off request successfully sent.*”



### Email Notifications:

Supervisor receives notification when time off is requested.

Employee receives notification when time off is Approved or Denied

- To Review Time Off Request
  - Click the > button to the left of **Pending, Approved, Conditionally Approved, or Rejected**
  - To cancel a pending time off request, click the **Red X** for that request

Dashboard

Time Card

Time Off Requests

Accruals Report

Personal Information

INSTRUCTIONS

Add New Time Off Request

Pending (1)

8/31/2017 GALLOW, MEGHAN Tuesday, September 26, 2017 8:00a - 10:00a PENDING ✕

Approved (0)

Conditionally Approved (0)

Rejected (0)



## CAPCO TRAINING MATERIAL for Complete Payroll Self Service Portal

- To Run Accrual Balance Report
  - Click **Accruals Report**
  - Enter **Start Date** and **End Date** of the range you want to reference
    - **NOTE: Starting Date should always be 8/19/2017.**
      - Employee accrued time balances as of 8/19/2017 were populated in the Online Timecard system.
      - Employee history of time accrued/taken before 8/19/2017 is not available in the Online Timecard system.
  - Select the time off categories you want included in the report
    - Select from Personal, Sick or Vacation (Do not check VACATION ACCRUAL AMOUNT)  
***In this example we have selected:***  
***Starting Date 8/19/2017, Ending Date 9/30/2017***  
***Balances to Include: Personal, Sick and Vacation***
  - Click **Run Report**

**Accruals Report**  
Enter the dates from which you want to get the accrual data, select the category, and click the Run Report button.

Hire Date: [1/14/2013](#)

Show accrual activity between

Starting date  History will be shown starting with this date. Leave it blank to go back as far as possible.  
Ending date  Balances will be shown as of this date. Enter today's date for current balances.

Balances to include

Personal  
 Sick  
 Vacation  
 VACATION ACCRUAL AMOUNT

**Run Report**

## CAPCO TRAINING MATERIAL for Complete Payroll Self Service Portal

- Accruals Report Information:
  - Dates:
    - Last Date in Pay Period-lists time accrued for that pay period. **Earning VACATION +4.93**  
**Earning SICK +3.71**  
**Earning PERSONAL +1.23**
    - Actual time taken or Approved requested time

8/25/2017	Deduction PERSONAL -7.50
-----------	-----------------------------

- Personal, Sick and Vacation hours = Balances as of date in 1<sup>st</sup> column.

***In this example:***

*Starting Date 8/19/2017 =Balance of Personal, Sick and Vacation*

*On 8/22/2017 = One Hour Personal Time Taken*

*On 9/1/2017=Accrued Personal 1.23 hours, Sick 3.71 hours, Vacation 4.93 hours*

*On 9/30/2017=Accrued Balances= Personal 15.92 hours, Sick 129.16 hours,  
Vacation 19.97 hours*

Accruals Report as of Thursday, August 31, 2017				
<input type="button" value="Print"/> <input type="button" value="Export to CSV"/>		All balances are as of the end of the listed reporting date.		
GALLOW, MEGHAN J		Personal	Sick	Vacation
8/19/2017	Adjusted by Nasso, Greg[gnasso]: Set PERSONAL to 20.73 Adjusted by Nasso, Greg[gnasso]: Set SICK to 118.04 Adjusted by Nasso, Greg[gnasso]: Set VACATION to 5.19	20.73	118.04	5.19
8/22/2017	Deduction PERSONAL -1.00	19.73	118.04	5.19
8/25/2017	Deduction PERSONAL -7.50	12.23	118.04	5.19
9/1/2017	Earning VACATION +4.93 Earning SICK +3.71 Earning PERSONAL +1.23	13.46	121.75	10.12
9/15/2017	Earning VACATION +4.93 Earning SICK +3.71 Earning PERSONAL +1.23	14.69	125.45	15.05
9/29/2017	Earning VACATION +4.93 Earning SICK +3.71 Earning PERSONAL +1.23	15.92	129.16	19.97
9/30/2017		15.92	129.16	19.97

**Important:** Click **Log Out** in upper right corner to leave the application

