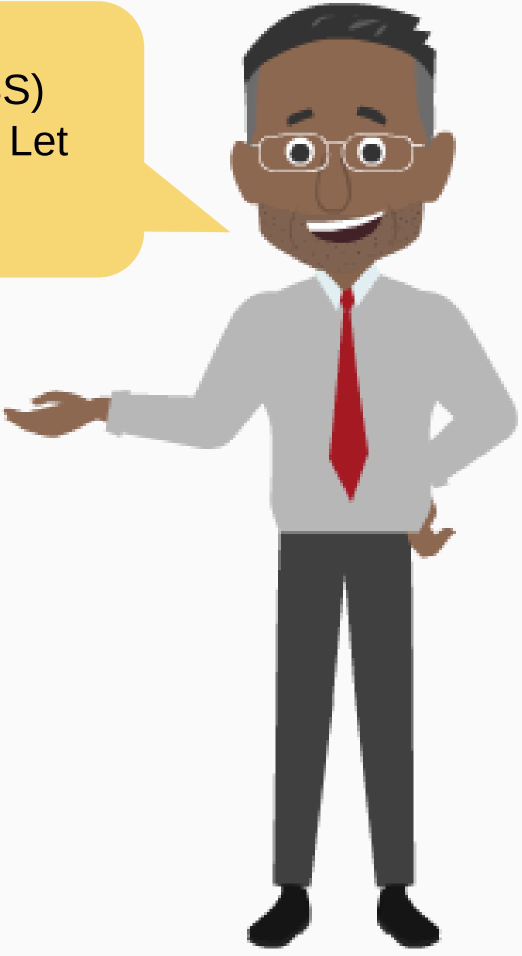
Introduction to Employee Self Service

All SHARE Users

Agenda

Welcome to the Introduction to the Employee Self Service (ESS) course! I am Eddie Self Service and I will be your guide today. Let us begin with the course agenda.



Course Introduction

Lesson 1: View Timesheets and Enter Time

Lesson 2: Manage Personal Information

Lesson 3: View Paycheck and Compensation

Lesson 4: View Benefits

Course Summary

Course Introduction

This Web-Based Training (WBT) course provides an overview of the Employee Self Service portal and explains its different sections.

Course Duration

Audience

Course Objectives

This course takes approximately 60 minutes to complete. Make sure you take the final assessment at the end!

SHARE

Course Introduction

This Web-Based Training (WBT) course provides an overview of the Employee Self Service portal and explains its different sections.

Course Duration

Audience

Course Objectives

This course provides a high level overview of the Employee Self Service portal and is applicable for all SHARE users.

Course Introduction

This Web-Based Training (WBT) course provides an overview of the Employee Self Service portal and explains its different sections.

Course Duration

Audience

Course Objectives

Upon completion of this course, you should be able to:

- Provide an overview of Employee Self Service
- View Timesheets and Enter Time
- Manage Personal Information
- View your Paycheck and Compensation
- View Benefits and Dependent/Beneficiary Information

Agenda

Course Introduction

Lesson 1: View Timesheets and Enter Time

Lesson 2: Manage Personal Information

Lesson 3: View Paycheck and Compensation

Lesson 4: View Benefits

Course Summary

View Timesheets and Enter Time

By the end of this lesson, you will be able to:

- Provide an overview of the Employee Self Service (ESS) portal
- Access your timesheet
- Enter your time
- Review your Reported Time

Lesson 1

Highlights of This Section

Here are the new and exciting features of Time Reporting!

- **Positive Time Reporting**: employees enter all of their hours worked, vacation, and leave time into SHARE every week.
- **Streamlined timesheets**: your timesheets are now much easier to navigate and will only have the columns you need.
- **Reorganized Time Reporting Codes (TRCs)**: TRCs will now display in order of most to least commonly used to make time reporting easier for you!

Key Terms

Take a moment to familiarize yourself with the key terms used through the course.

- Reported Time
- Payable Time
- TRCs
- Time Period

Time you enter and submit in your timesheet. The time you submit has to be approved by your supervisor and run through the Time Administration process to turn into Payable Time.

Key Terms

Take a moment to familiarize yourself with the key terms used through the course.

- Reported Time
- **Payable Time**
- TRCs
- Time Period

Time that is approved by your supervisor, run through the Time Administration process, and is reflected in your paycheck.

Key Terms

Take a moment to familiarize yourself with the key terms used through the course.

Reported Time

Payable Time

TRCs

Time Period

Time Reporting Codes (TRCs) are used to identify the type of time you can report, for example, Regular Hours, Extra Hours, Annual Leave, and Sick Leave.

Key Terms

Take a moment to familiarize yourself with the key terms used through the course.

Reported Time

Payable Time

TRCs

Time Period

Time Period refers to the multiple ways you can view your timesheet. You can view it by day, week or pay period (biweekly).

Key Terms

Take a moment to familiarize yourself with the key terms used through the course.

- Calendar Period
- Exceptions
- Paycheck Modeler
- Positive Time Reporting

A two week time period that includes the hours reflected on your paycheck or pay advice. In your timesheets, Calendar Period is the same as pay period.

Key Terms

Take a moment to familiarize yourself with the key terms used through the course.

- Calendar Period
- **Exceptions**
- Paycheck Modeler
- Positive Time Reporting

Exceptions, or errors, are violations of your predefined schedule. The most common exception is when an employee incorrectly reports Regular Hours Worked (REGHR) during a holiday.

Key Terms

Take a moment to familiarize yourself with the key terms used through the course.

- Calendar Period
- Exceptions
- **Paycheck Modeler**
- Positive Time Reporting

The Paycheck Modeler is used to simulate paychecks through ESS. You can create your own “What If” scenarios to see what your paycheck will look like if you change your hourly rate, tax deductions, and tax withholdings.

Key Terms

Take a moment to familiarize yourself with the key terms used through the course.

- Calendar Period
- Exceptions
- Paycheck Modeler
- Positive Time Reporting

Positive Time Reporting means you submit the actual hours worked and/or taken as leave for approval every week. Managers receive a notification to approve employees' timesheets and employees will be paid based on the Reported Time on approved timesheets.

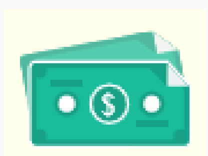
Introduction to Employee Self Service Portal

The **Employee Self Service (ESS)** portal, previously known as Self Service, provides immediate access to your personal information. You can review and make edits to this information directly in SHARE 9.2. The **ESS** portal home page is organized in tiles as shown below:

Employee Self Service

Timesheet Entry

Enter your time here.



Payroll

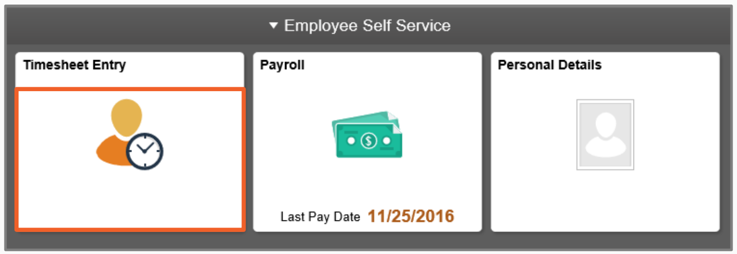
You can view your pay advices and paycheck information here.

Personal Details

View and update your personal information such as name and address, personal email and emergency contacts.

Access Timesheets

Timesheets enable you to view and report time. You can access your timesheet from the Employee Self Service **Timesheet Entry** tile or from the **NavBar**.



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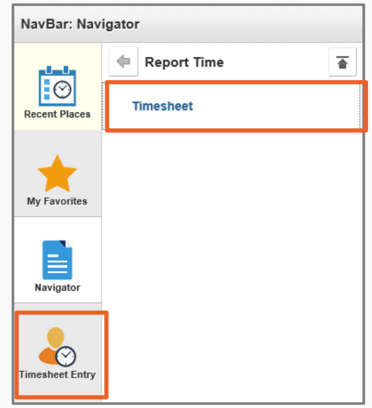
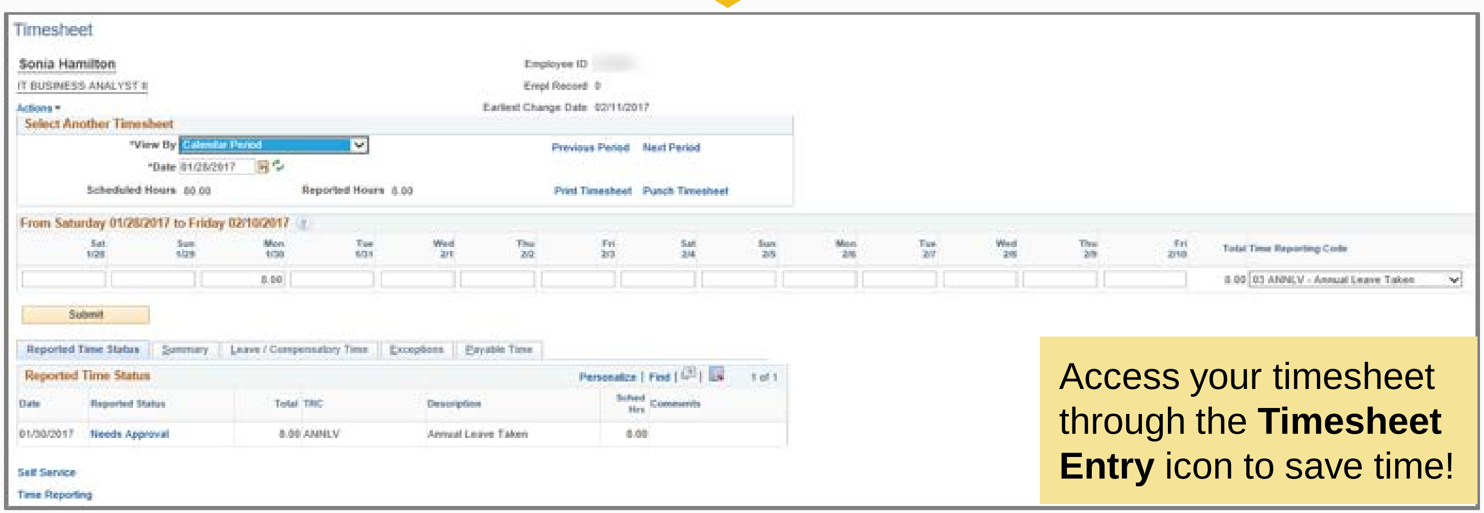


Click > **NavBar** > **Navigator** > **Self Service** > **Time Reporting** > **Timesheet**



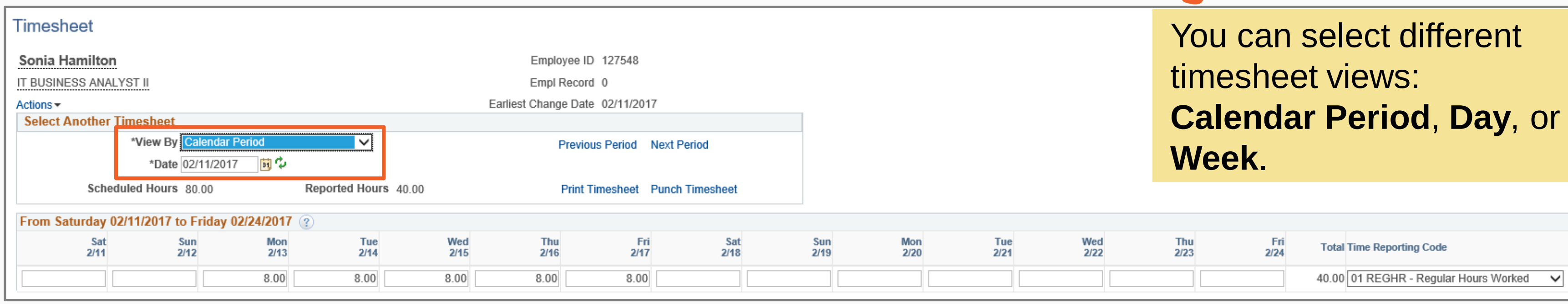
Access your timesheet through the **Timesheet Entry** icon to save time!

Report Time : Submit Timesheet Details

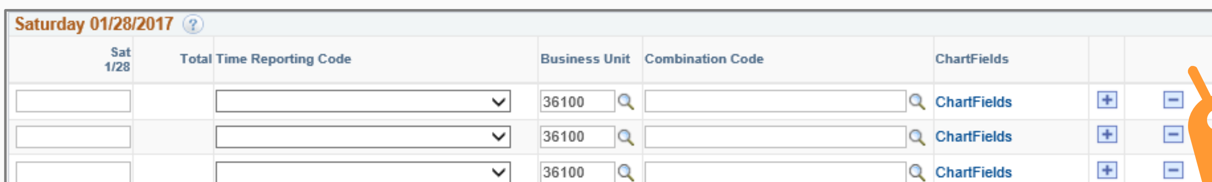
Time reporting tracks your **Scheduled** and **Reported** hours.

1 Calendar View

You can select different timesheet views: **Calendar Period**, **Day**, or **Week**.



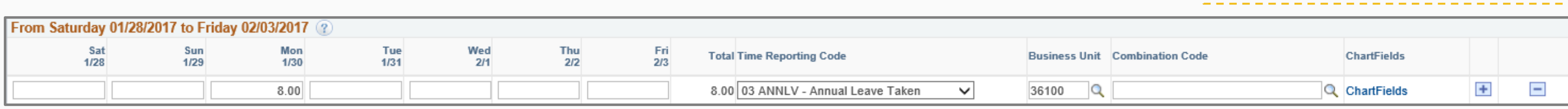
2 View by Day



TIP: **Calendar Period** is the same as pay period.

TIP: Select the desired timesheet view period and click the **Refresh** icon to update the view period.

3 View by Week



Lesson 1

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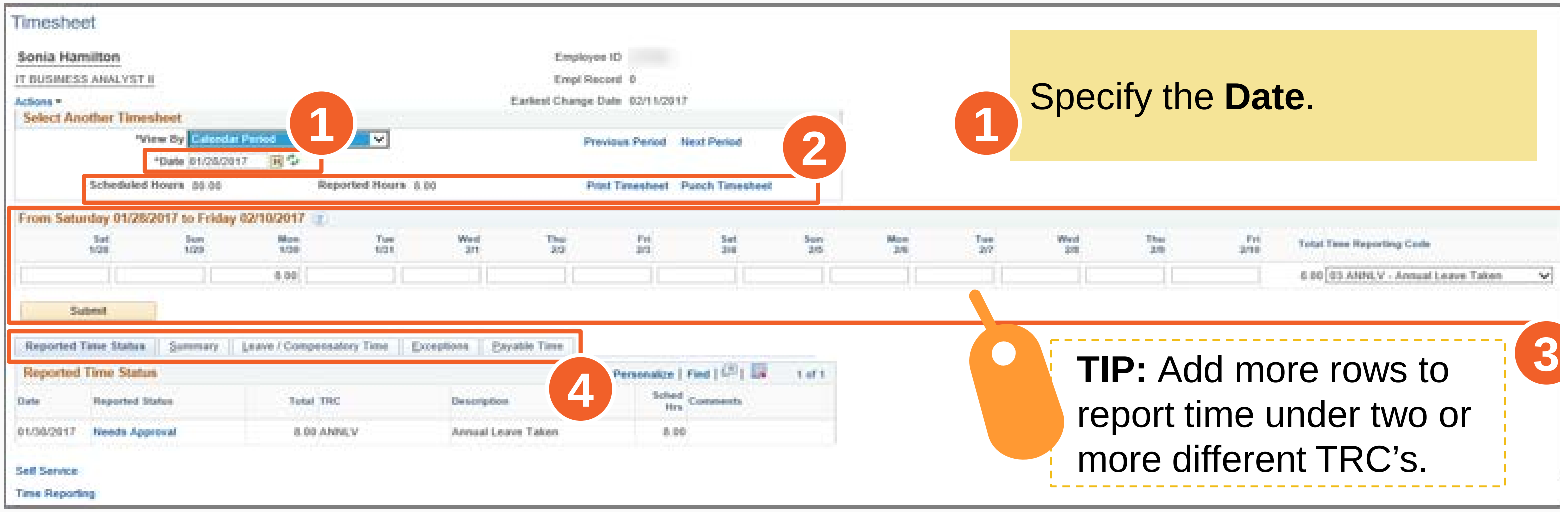
Report Time : Submit Timesheet Details (Cont.)

Time reporting tracks your **Scheduled** and **Reported** hours.



1 Specify the **Date**.

3 **TIP:** Add more rows to report time under two or more different TRC's.

2 You can view your **Scheduled Hours** and **Reported Hours** for the selected date.

3 Enter your Time and **TRC** here. Click **Submit** after entering your time. Report your hours under **REGHR TRC** or another **TRC**.

4 View your: **Reported Time Status**, **Summary**, **Leave/ Compensatory Time** Details, **Exceptions**, and **Payable Time**.

Lesson 1

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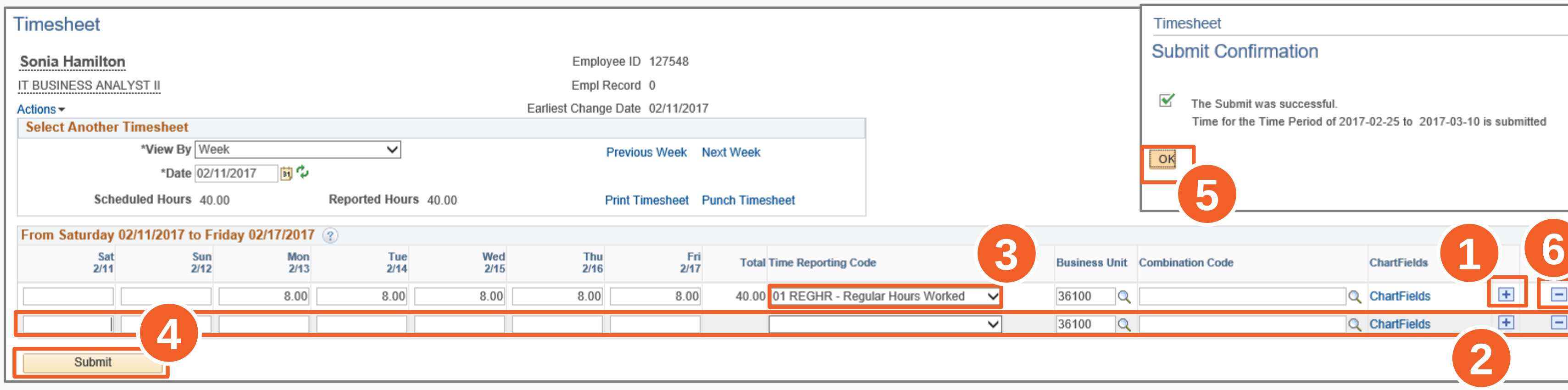
Report Time : Submit Timesheet Details (Cont.)

Timesheets allow you to add or delete rows to submit your time under two or more TRC's.



1. Click > **Add button** icon on your timesheet
2. A new row displays in your timesheet. Enter > **Time in hours** in the field
3. Select > **TRC** from the **Time Reporting Code** drop-down menu for the new time entry
4. Click > **Submit** to save your time
5. Click > **OK** on your **Timesheet Submit Confirmation page**. You have successfully submitted your time for the selected time period
6. Click > **Delete button** icon to delete a row in your timesheet. Select **Yes – Delete** on the **Delete Confirmation** page to delete the row from your timesheet.

Note: After you add or delete a row, click **Submit** to save your time.

Report Time : Submit Timesheet Details (Cont.)

Time reporting tracks your **Scheduled** and **Reported** hours.

Reported Time Status | Summary | Leave / Compensatory Time | Exceptions | Payable Time

Reported Time Status — Personalize | Find | 1 of 1

Date	Reported Status	Total	TRC	Description	Sched Hrs	Comments
01/30/2017	Needs Approval	8.00	ANNLV	Annual Leave Taken	8.00	

The **Reported Time Status** tab gives you an overview of the time you have reported. If the status requires approval from your manager, the **Reported Status** field displays **Needs Approval**. Other **Reported Status** fields are **Approved** and **Denied** if your manager has approved or rejected the time you submitted.

Reported Time Status | Summary | Leave / Compensatory Time | Exceptions | Payable Time

Reported Time Status — Personalize | Find | 1 of 1

Select	Date	Reported Status	Total	TRC	Description	Sched Hrs	Add Comments
	02/13/2017	Denied	8.00	REGHR	Regular Hours Worked	8.00	

TIP: Click the comment bubble to view any comments your manager made.

TIP: If your time is denied, you need to correct and resubmit your timesheet.

Lesson 1

SHARE

Report Time : Submit Timesheet Details (Cont.)

Time reporting tracks your **Scheduled** and **Reported** hours.

Reported Time Status | Summary | Leave / Compensatory Time | Exceptions | Payable Time

Reported Time Status — Personalize | Find | 1 of 1

Date	Reported Status	Total	TRC	Description	Sched Hrs	Comments
01/30/2017	Needs Approval	8.00	ANNLV	Annual Leave Taken	8.00	

The **Summary** tab gives you an overview of your **Paid Leave**, **Total Reported Hours**, and **Total Scheduled Hours** on a weekly basis.

Reported Time Summary — Personalize | Find | 1-5 of 5

Category	Total	Week 1 (1/28-2/3)	Week 2 (2/4-2/10)
Paid Leave Time	8.00	8.00	
Total Reported Hours	8.00	8.00	
Total Scheduled Hours	80.00	40.00	40.00
Schedule Deviation	-72.00	-32.00	-40.00
Time with no Category			

Report Time : Submit Timesheet Details (Cont.)

Time reporting tracks your **Scheduled** and **Reported** hours.

Reported Time Status | Summary | Leave / Compensatory Time | Exceptions | Payable Time

Reported Time Status — Personalize | Find | 1 of 1

Date	Reported Status	Total	TRC	Description	Sched Hrs	Comments
01/30/2017	Needs Approval	8.00	ANNLV	Annual Leave Taken	8.00	

The **Leave and Compensatory Time** tab provides leave and compensatory time balances to date.

Leave and Compensatory Time Balances — Personalize | Find | 1-9 of 9

Plan Type	Plan	Recorded Balance	Minimum Allowed	Maximum Allowed	View Detail
Leave	Sick	115.64	0	9999	
Leave	Vacation	120.55	0	9999	
Leave	Donated Sick	0.00	0	9999	
Leave	Donated Leave	0.00	0	9999	
Comp Time	PREMBANKOT	0.00	0		
Comp Time	ADMINCOMP	0.00	0		
Comp Time	HOLIDAYCMP	0.00	0		
Comp Time	COMPTIME	4.00	0		
Comp Time	PERSONAL	8.00	0	24	

TIP: Your maximum amount of personal comp hours varies based on your schedule and by agency.

Report Time : Submit Timesheet Details (Cont.)

Time reporting tracks your **Scheduled** and **Reported** hours.

Reported Time Status | Summary | Leave / Compensatory Time | Exceptions | Payable Time

Reported Time Status — Personalize | Find | 1 of 1

Date	Reported Status	Total	TRC	Description	Sched Hrs	Comments
01/30/2017	Needs Approval	8.00	ANNLV	Annual Leave Taken	8.00	

The **Exceptions** tab displays violations of your predefined schedule. Exception errors display a clock icon

Exceptions — Personalize | Find | 1 of 1

Date	Exception ID	Exception Source	Status	Exception Severity

TIP: **Exceptions,** or errors, can impact pay; reach out to your Human Resources Administrator to clear them.

Report Time : Submit Timesheet Details (Cont.)

Time reporting tracks your **Scheduled** and **Reported** hours.

Reported Time Status | Summary | Leave / Compensatory Time | Exceptions | Payable Time

Reported Time Status — Personalize | Find | 1 of 1

Date	Reported Status	Total	TRC	Description	Sched Hrs	Comments
01/30/2017	Needs Approval	8.00	ANNLV	Annual Leave Taken	8.00	

The **Payable Time** tab shows the time that has been approved, processed by system rules, and converted to payable time. **Reported Time** does not appear on this tab immediately.

You can view payable time by:

- **Time Reporting Code (TRC)** and **Status**, also known as payable time summary
- **Time Reporting Code**, **Status**, and **Day**

Payable Time Viewing Option

- By TRC and Status
- By TRC, Status and Day
- Show In Detail

View Full Detail

Payable Time — Personalize | Find | 1-3 of 3

TRC	Description	TRC Type	Payable Status	Quantity
PRSNA	Personal Leave Day Awarded	Hours	Closed	8.00
SCHED	Scheduled Work Hours	Hours	Taken by Payroll	72.00

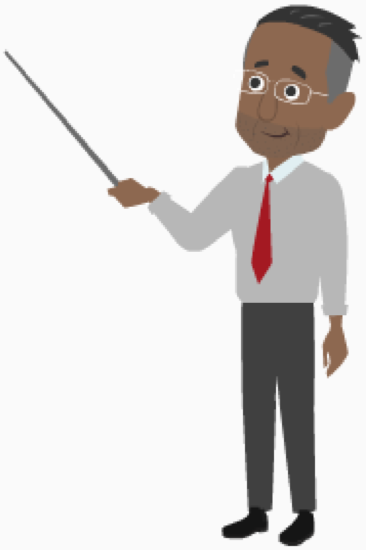
Lesson 1

SHARE

Submit Timesheet Details: Key Points

Following are a list of points you should remember while filling your timesheet:

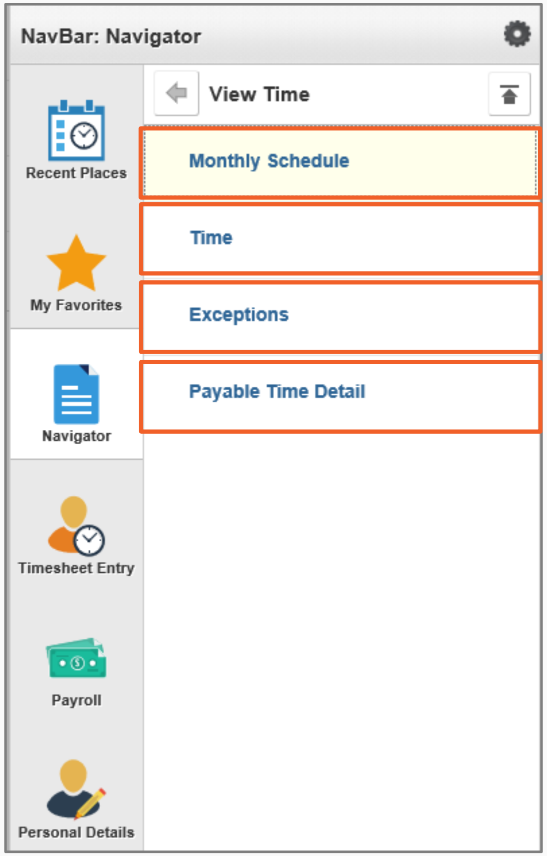
- **Time Reporting Codes** (TRCs) appear in order of most to least used
- There are four types of timesheets. We have modeled the most commonly used one. The other three include: combo codes, special rule processing, and project codes. You can view the Timesheets Job Aid to see the other timesheets
- If your time is denied you can check the comments from your time approver to view why the time was denied. Then, you can change the time entry and resubmit your hours
- Holidays are automatically populated in the **Payable Time** tab of your timesheet. If, for example, you try to enter regular hours worked during a holiday, you will get a warning message
- You can add multiple rows to report time, one row per TRC
- If approved **Reported Time** is changed, you will get an email notification indicating who changed the time. The new reported hours will have to be approved

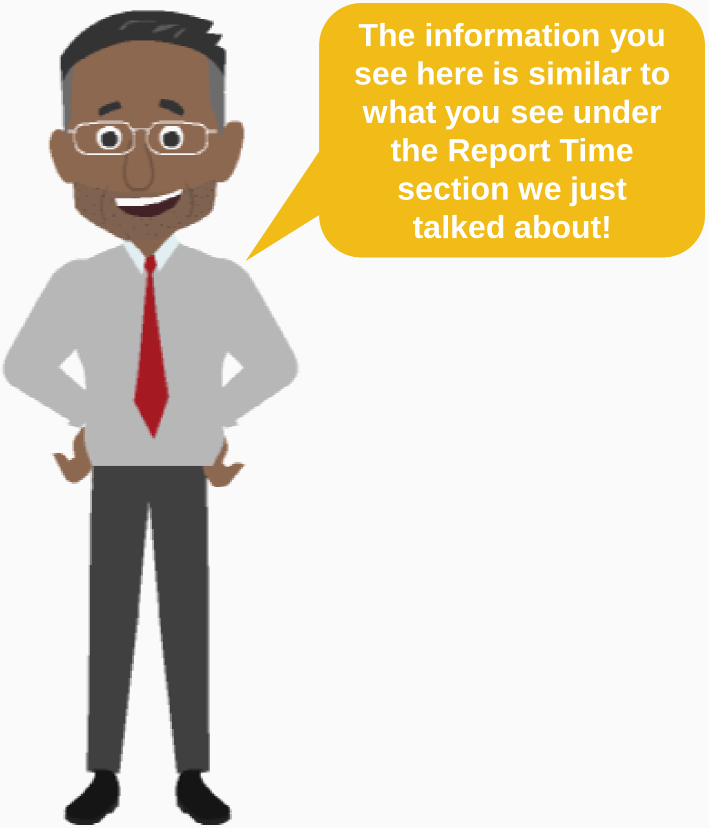


View Time

View your **Monthly Schedule**, **Time**, **Exceptions,** and **Payable Time Detail** in this section. Follow the navigation path below to access the **View Time** section:

Click > **NavBar** > **Navigator** > **Self Service** > **Time Reporting** > **View Time**





View Timesheets and Enter Time Summary

In this lesson we learned:

- ✓ How to navigate to the Employee Self Service portal and its specific functions
- ✓ How to enter you time using the Time Reporting Codes and submit for approval
- ✓ Timesheets give you an overview of Reported Time Status, Summary, Leave/Compensatory Time details, Exceptions and Payable Status
- ✓ Timesheets allow you to change the view to Calendar, Day, and Week
- ✓ The View Time menu allows you to view your time reported and Payable Time Detail

Agenda

Course Introduction

Lesson 1: View Timesheets and Enter Time

Lesson 2: Manage Personal Information

Lesson 3: View Paycheck and Compensation

Lesson 4: View Benefits

Course Summary

Manage Personal Information

By the end of this lesson, you will be able to:

- Access the Personal Information section
- Modify your personal details: Address, Contact Details, Ethnic Group and Emergency Contacts
- Submit a request to your Human Resources (HR) Administrator to modify your Name and/or Marital Status

Highlights of This Section

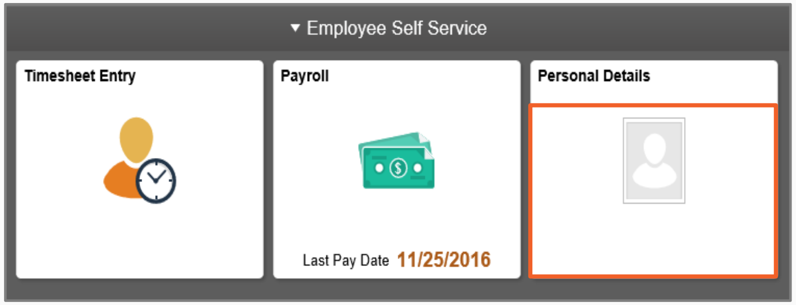
Here are the new and exciting features of Personal Information!

- **Quick access to personal information and benefits**: you can view your address, contact information, emergency contact, as well as your benefits and dependents' information with just one click.

- **Edit personal information**: in SHARE 9.2 you can edit some personal information including your address, contact details, personal email, emergency contact, and more! You can also request a name and marital status change, but need to submit the proper documentation to your HR Administrator.

Access: Personal Information

You can view and modify some of your personal information through SHARE 9.2. You can access your personal details through the **Personal Details** tile or the **Navigator**.



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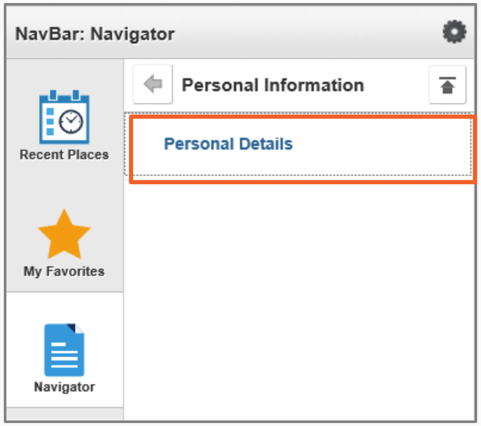


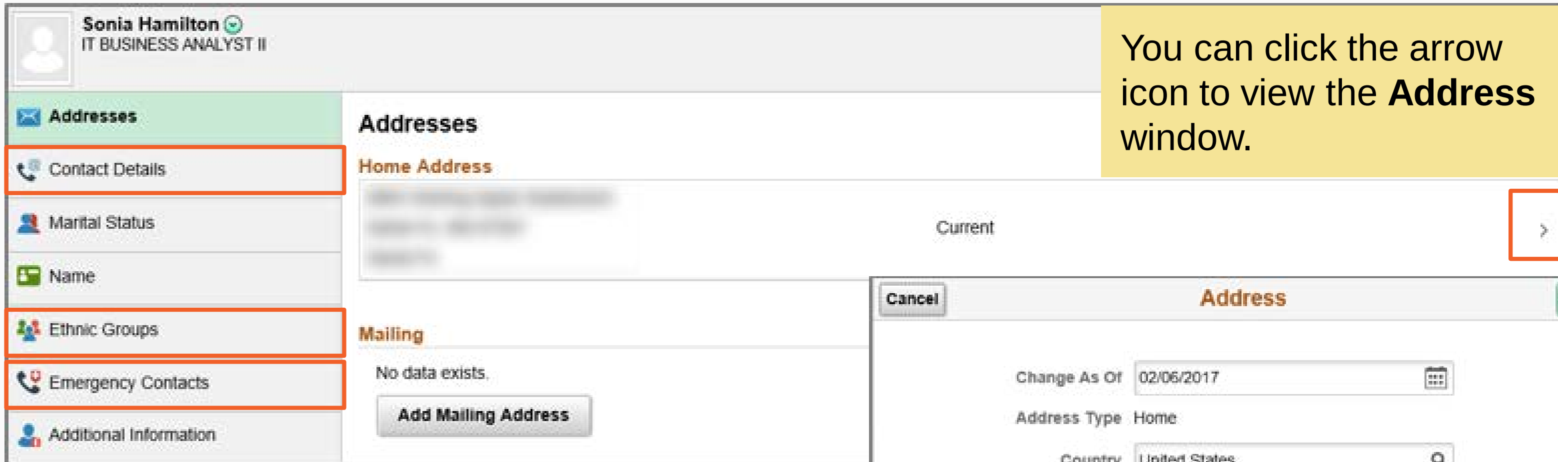
TIP: Access your personal details through the icon to save time!

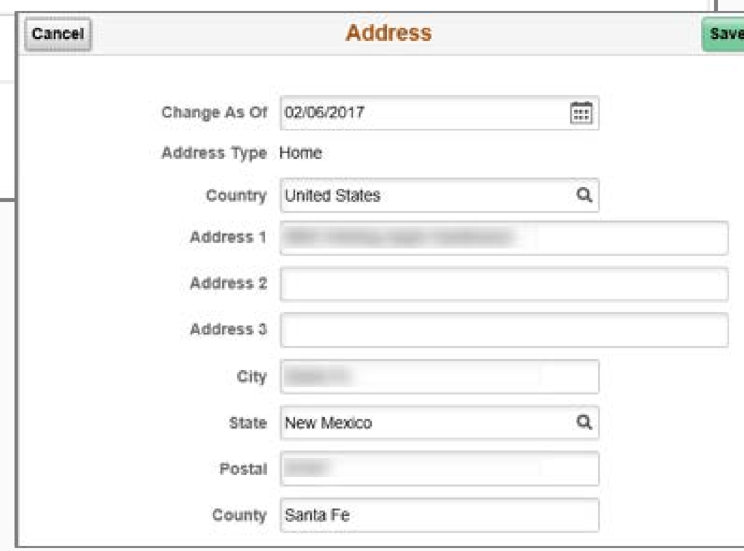
Click > **NavBar** > **Navigator** > **Self Service** > **Personal Information**

Manage Personal Information: Address

Modify your **Home/Mailing** address in the **Home Address** section. You can click › to make your updates.

You can click the arrow icon to view the **Address** window.





Update the **Home/Mailing** Address details in the window and click **Save**.

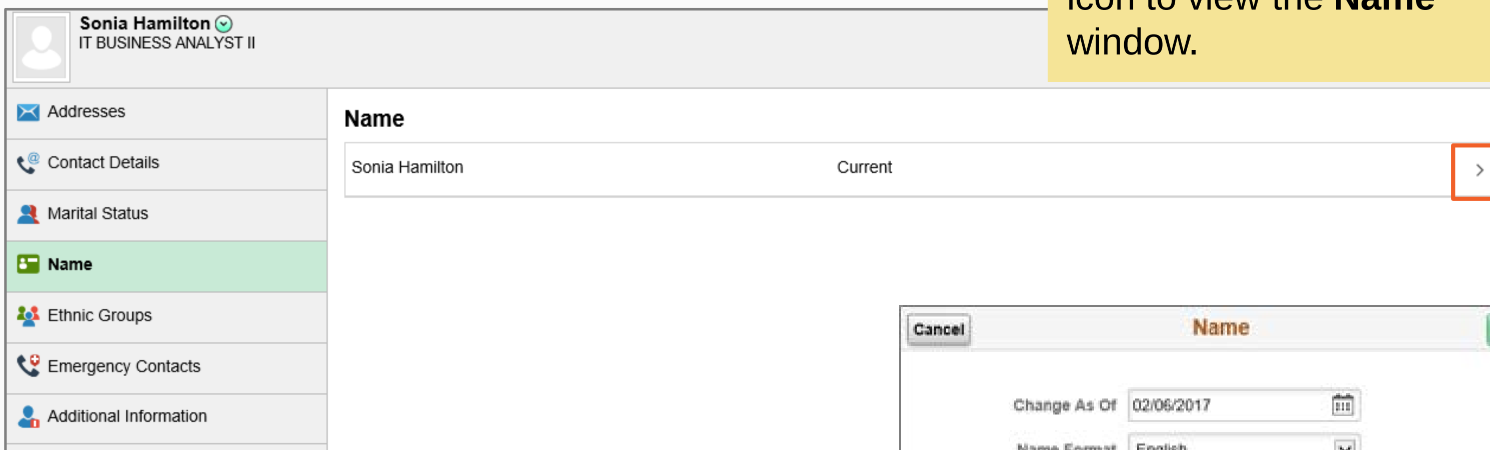
TIP: Verify your home and mailing address (if different from home address) are entered correctly.

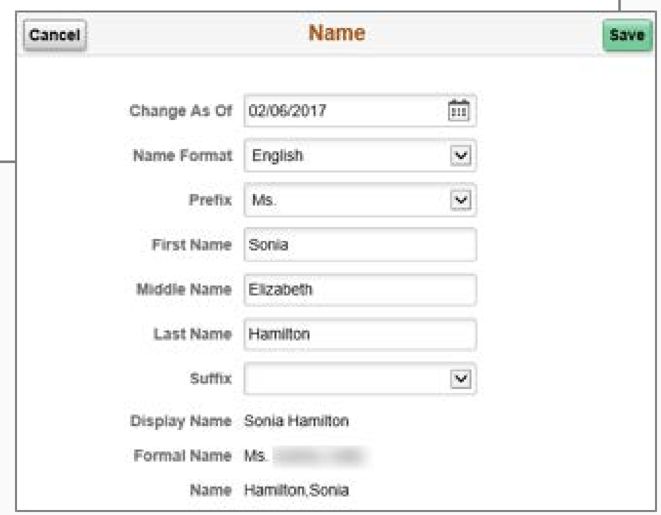
Note: SHARE 9.2 allows you to modify your **Address**, **Contact Details**, **Ethnic Group**, and **Emergency Contact** details.

Request for Update: Personal Information

Submit a request to modify your **Name** and **Marital Status**. You must provide a copy of your updated Social Security Card to your HR Administrator for approval.

You can click the arrow icon to view the **Name** window.



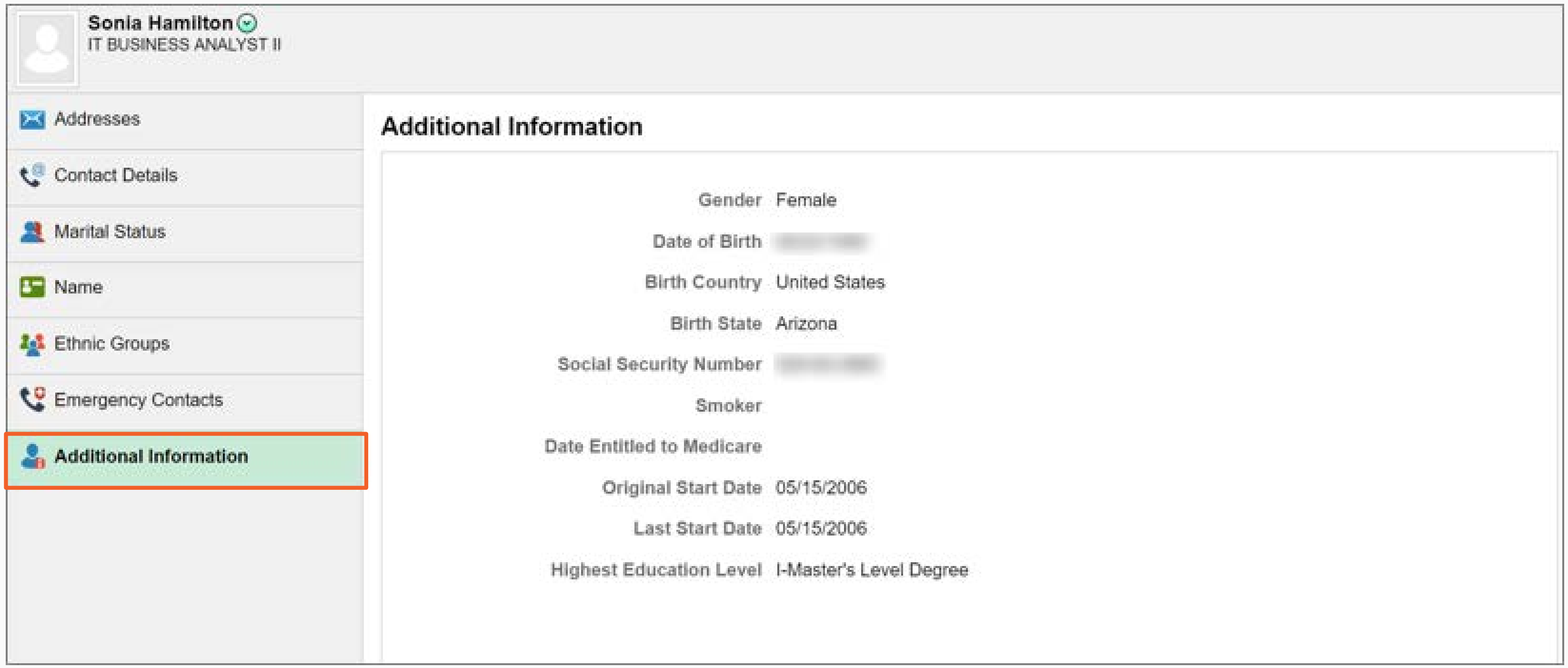


Complete the details on the **Name** change window and click **Save** to submit a request to the HR Administrator. You must show HR your new Social Security Card for your name change to be approved.

Lesson 2

Additional Information

Additional Information displays your **Gender**, **Date of Birth**, **Birth Country**, **Birth State**, **Social Security Number**, **Start Date**, and other personal information.



Note: The State of New Mexico does not track employees' smoker history.

Manage Personal Information Summary

In this lesson we learned:

- ✓ SHARE 9.2 allows you to modify your Address, Contact Details, Ethnic Group, and Emergency Contact Details
- ✓ SHARE 9.2 allows you to submit a request for Name change and Marital Status change

Agenda

Course Introduction

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Lesson 3

View Paycheck and Compensation

By the end of this lesson, you will be able to:

- Access the Payroll and Compensation section
- View your Pay Advice
- Use the Paycheck Modeler
- Manage W-2/W-2c forms

Lesson 3

Highlights of This Section

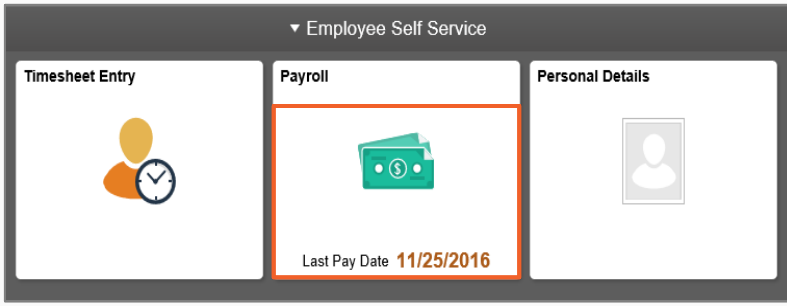
Here are the new and exciting features of Paycheck and Compensation!

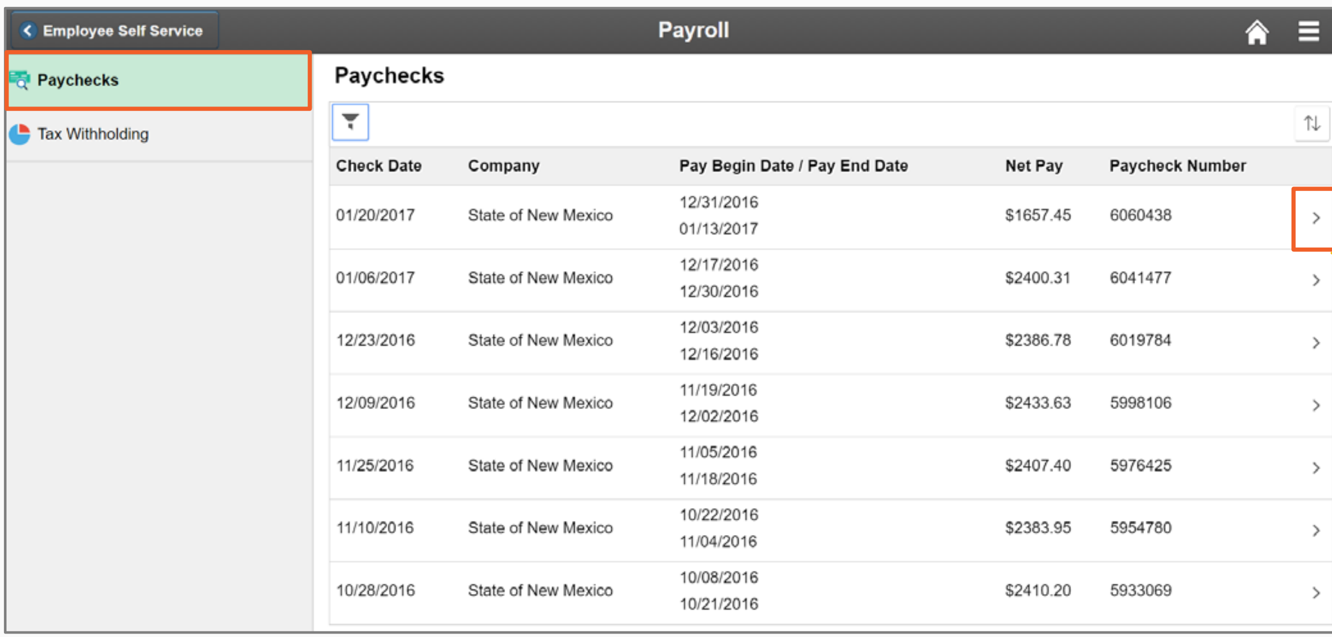
- **Paycheck Modeler**: in Employee Self Service (ESS) you can create “What If” scenarios to see what your paycheck would look like if your salary changed or you modified your deductions or tax withholdings.

- **W-2 form**: now you can see your W2 in ESS, request to receive your W-2 form electronically, and ask to reissue your W-2 – with just one click!

Access: Paycheck and Compensation

SHARE 9.2 allows you to view your paycheck and compensation information. You can click the **Payroll** tile to view your **Pay Advice** and **Tax Withholdings**.





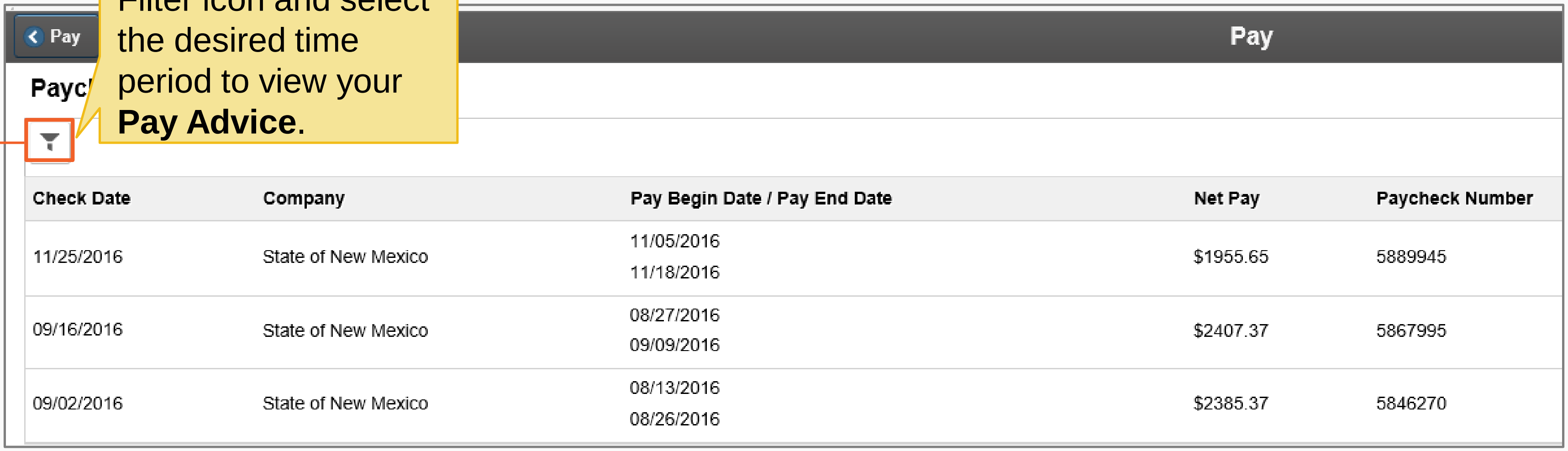
You can click the right arrow to view your **Pay Advice.**

SHARE

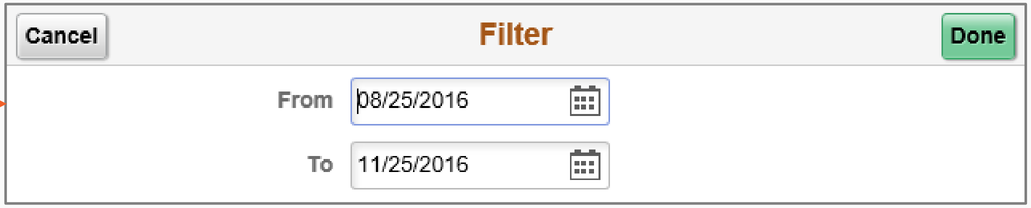
View your Pay Advice

View your Pay Advice in the **Pay** section. SHARE 9.2 allows you to choose the number of pay advices to view at a time.

You can click the Filter icon and select the desired time period to view your **Pay Advice**.



Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number
11/25/2016	State of New Mexico	11/05/2016 11/18/2016	$1955.65	5889945
09/16/2016	State of New Mexico	08/27/2016 09/09/2016	$2407.37	5867995
09/02/2016	State of New Mexico	08/13/2016 08/26/2016	$2385.37	5846270



Access: Paycheck and Compensation

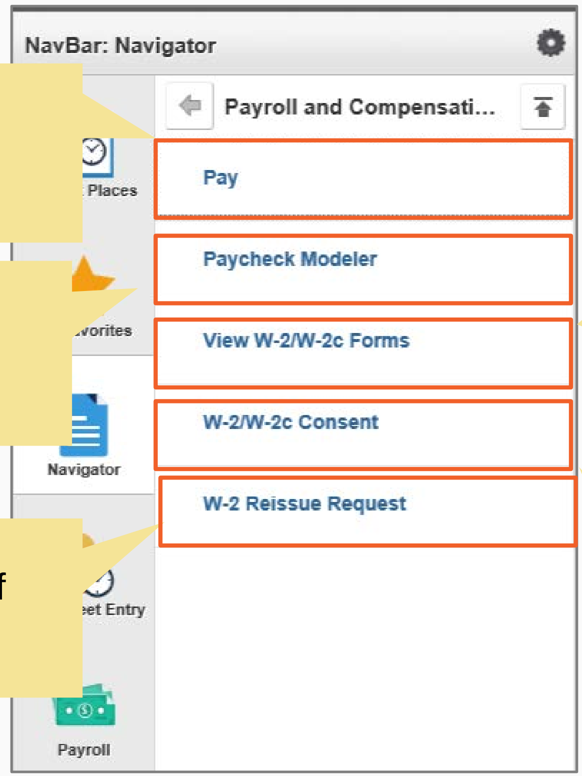
SHARE 9.2 allows you to use the **NavBar** to view more information related to your paycheck and compensation.

Click > **NavBar** > **Navigator** > **Self Service** > **Payroll and Compensation**

View your paycheck related information.

Use the **Paycheck Modeler** to calculate your earnings with hypothetical values.

Request a reissue of your W-2 form.



Access W-2/W-2c forms.

Submit or withdraw your consent to receive electronic W-2 or W-2c forms.

Lesson 3

Use the Paycheck Modeler

Use the **Paycheck Modeler** to view what your paycheck could be if you changed your earnings, deductions, and/or tax withholding status. The **Paycheck Modeler** starts with your current paycheck and allows you to perform “What If” scenarios.

The following “What If” scenarios are examples you can create via the **Paycheck Modeler**:

- You got a promotion and your hourly pay will increase by a certain number of dollars
- You want to add health coverage for a new dependent, which affects your healthcare contribution amounts, taxes, and net pay
- You just got married and want to see the effect of changing your tax withholding status on your net pay

Note: The **Paycheck Modeler** provides an estimate of your paycheck. It does not represent your actual paycheck.

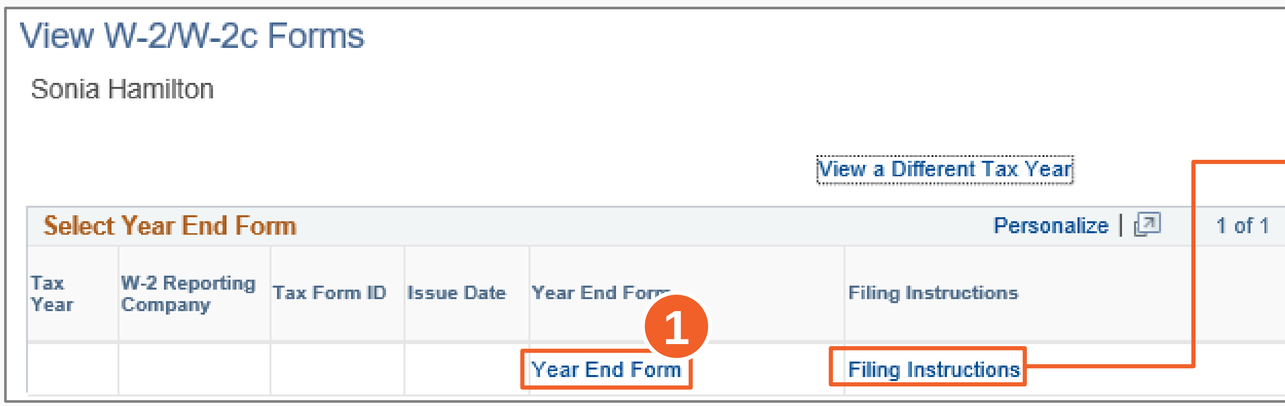
View W-2/W-2c Forms

SHARE 9.2 allows you to view your year-end W-2/W-2c forms. New W-2 forms will be available on or before January 31st of each year. Follow the navigation path below to access your forms.

Click > **NavBar** > **Navigator** > **Self Service** > **Payroll and Compensation** > **View W-2/W-2c forms**

To view the form for a different tax year, select the tax year under **View a Different Tax Year** View a Different Tax Year.

1. Click > **Year End Form** to view your form



TIP: **Filing Instructions** provides the instructions to file your year-end W-2/W-2c forms.

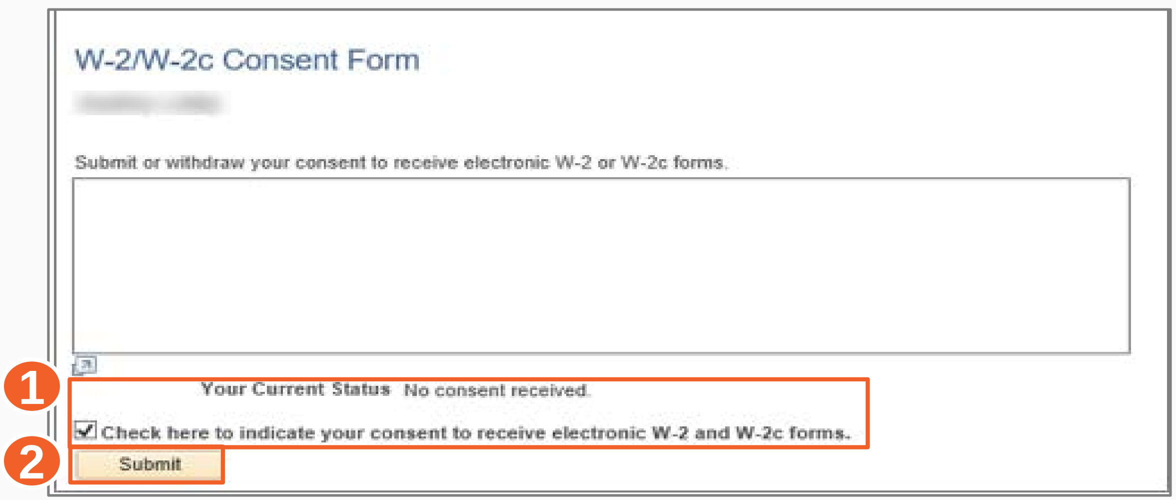
Note: You can find more information on your W-2 forms on the SHARE Collaboration Site link: share.state.nm.us\collaboration_home.html.

Submit Consent to Receive W-2/W-2c Forms

SHARE 9.2 allows you to submit or withdraw your consent to receive electronic W-2 or W-2c forms as well as submit a request to reissue your W-2/W-2c forms.

1. Enter your written agreement to submit or withdraw your consent to receive electronic W-2 or W-2c forms in the space provided

2. Click the check box to indicate your consent to receive electronic W-2 and W-2c forms and Click > **Submit**



Note: A dialog box appears to submit your consent to receive electronic W2 forms. In the comment box type: “ I consent to receive only an electronic copy of my W-2 form(s)”.

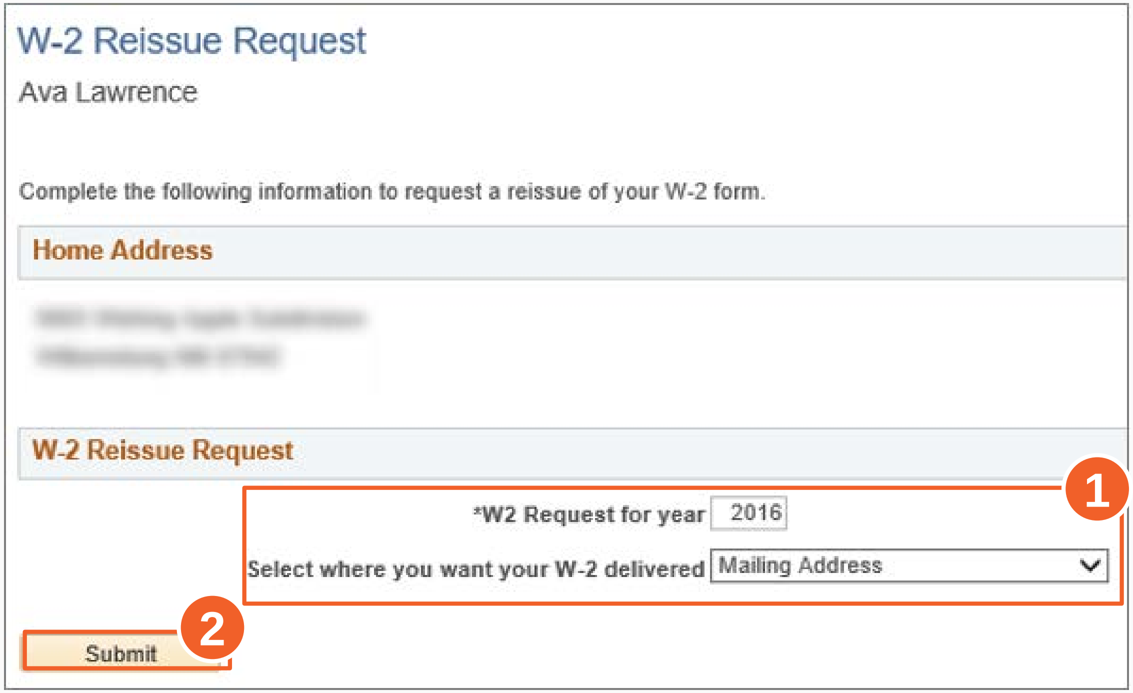
Submit Reissue Request for W-2 Form

Request a reissuance of a printed copy of your W-2 form by submitting a reissue request.

Verify your **Home Address** and select where you want the W-2 form to be delivered.

1. Enter a year in **W2 Request for Year** and select > **Mailing Address**

2. Click > **Submit**



Note: You can select **Home Address**, **Mailing Address**, or **Work Location** as an option to get the W-2 form delivered.

Lesson 3

View Paycheck and Compensation Summary

In this lesson we learned:

- How to navigate to the Payroll and Compensation section and its components
- Paycheck Modeler allows you to view a hypothetical paycheck with changed earnings, deductions, and/or tax withholding status
- SHARE 9.2 allows you to view your W-2/W-2c forms and submit a request to reissue your W-2 form

Agenda

Course Introduction

Lesson 1: View Timesheets and Enter Time

Lesson 2: Manage Personal Information

Lesson 3: View Paycheck and Compensation

Lesson 4: View Benefits

Course Summary

Lesson 4

View Benefits

By the end of this lesson, you will be able to:

- Access the Benefits section
- Review Flexible Spending Accounts Activity
- View your Benefits Summary
- View your Dependent/Beneficiary Information

SHARE

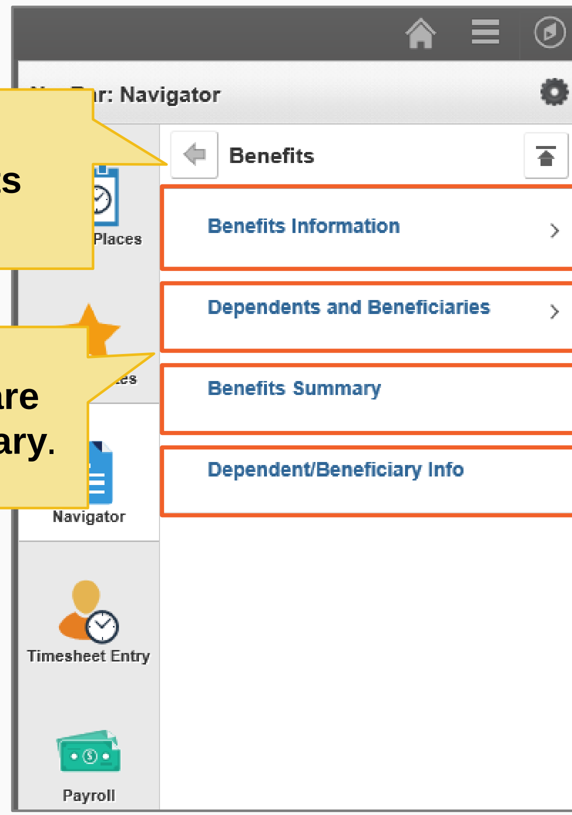
Access: Benefits Section

Follow the navigation path below to access the **Benefits** section.

Click > **NavBar** > **Navigator** > **Self Service** > **Benefits**

View your **Flexible Spending Accounts** Activity.

View your **Healthcare Dependent Summary.**



View your **Benefits.**

View your **Dependent and Beneficiary Information.**

Benefits Information: Review Flexible Spending Accounts Activity

The **Flexible Spending Accounts (FSAs)** page allows FSA enrolled employees to view detailed information such as your annual pledge, balance, claims detail, and claims payment detail.

Click > **NavBar** > **Navigator** > **Self Service** > **Benefits** > **Benefits Information** > **Flexible Spending Accounts**

Follow the steps below to review your **Flexible Spending Account** status for a specific year.

1. Enter a **Year** and click > **Go**

Flexible Spending Account(s) display.

2. Select the **Spending Account** from the enrolled accounts listed to view your account summary


Flexible Spending Accounts

Sonia Hamilton

Your Flexible Spending Account(s) in 2017

Select Plan Year

You may review your Flexible Spending Account status and activity for any plan year.
Reminder: Claims are reported in the Plan Year for which the services were rendered, regardless of when the expense was paid or when the claim was processed.

To review past benefits information, enter the ye... lect the Go button.

Year 2017 (YYYY) Go

Select Account

For this Plan Year you are enrolled in the Flexible Spending Account(s) listed on the page. Please select the one you wish to review.

Enrollment Details

Spending Account	Annual Pledge	Contributions YTD	Claims Submitted	FSA Claims Approved	Claims Paid YTD
FSA Medical	1,500.00	143.08	0.00	0.00	0.00
FSA Dependent - Family	5,000.00	384.62	0.00	0.00	0.00

Note: For more information on your benefits navigate to the following site: http://www.mybenefitsnm.com/.

Lesson 4

SHARE

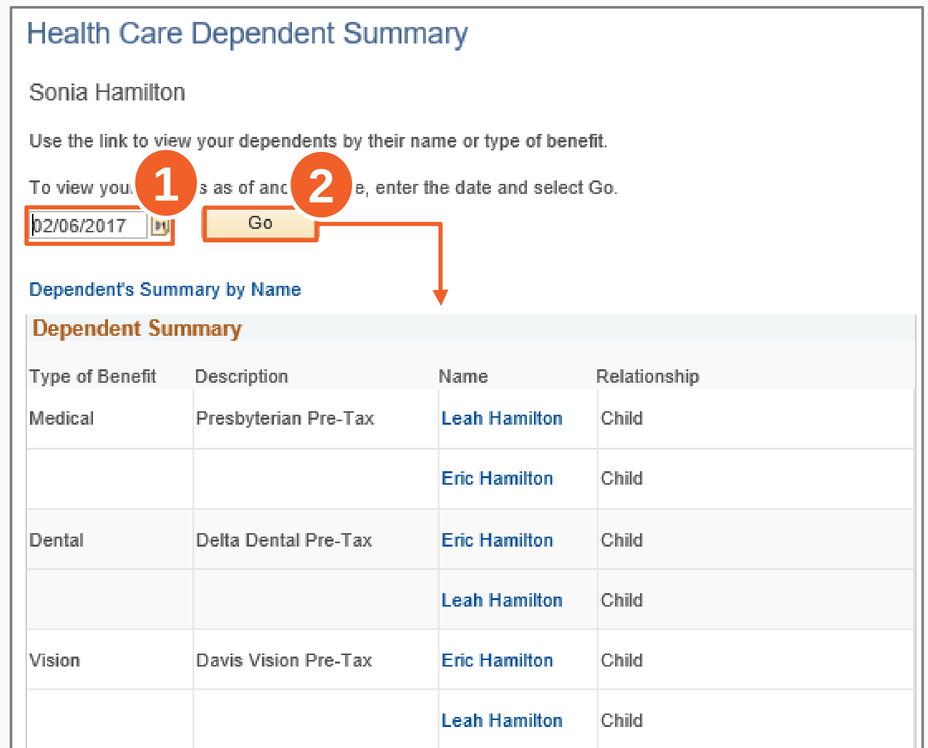
Health Care Dependent Summary: View List of Dependents

View your dependents by **Name** and **Type of Benefit** under the **HealthCare Dependent Summary** section. The **HealthCare Dependent Summary** displays benefits plans and allows you to view your covered dependent details under each plan.

Click > **NavBar** > **Navigator** > **Self Service** > **Benefits** > **Dependents and Beneficiaries** > **Health Care Dependent Summary**

Follow the steps below to view your **Health Care Dependent Summary**:

1. Select > **Date**
2. Click > **Go**


Health Care Dependent Summary

Sonia Hamilton

Use the link to view your dependents by their name or type of benefit.

To view you[…]s as of anc[…]e, enter the date and select Go.

02/06/2017 Go

Dependent's Summary by Name

Dependent Summary

Type of Benefit	Description	Name	Relationship
Medical	Presbyterian Pre-Tax	Leah Hamilton	Child
		Eric Hamilton	Child
Dental	Delta Dental Pre-Tax	Eric Hamilton	Child
		Leah Hamilton	Child
Vision	Davis Vision Pre-Tax	Eric Hamilton	Child
		Leah Hamilton	Child

Lesson 4

View Benefits Summary

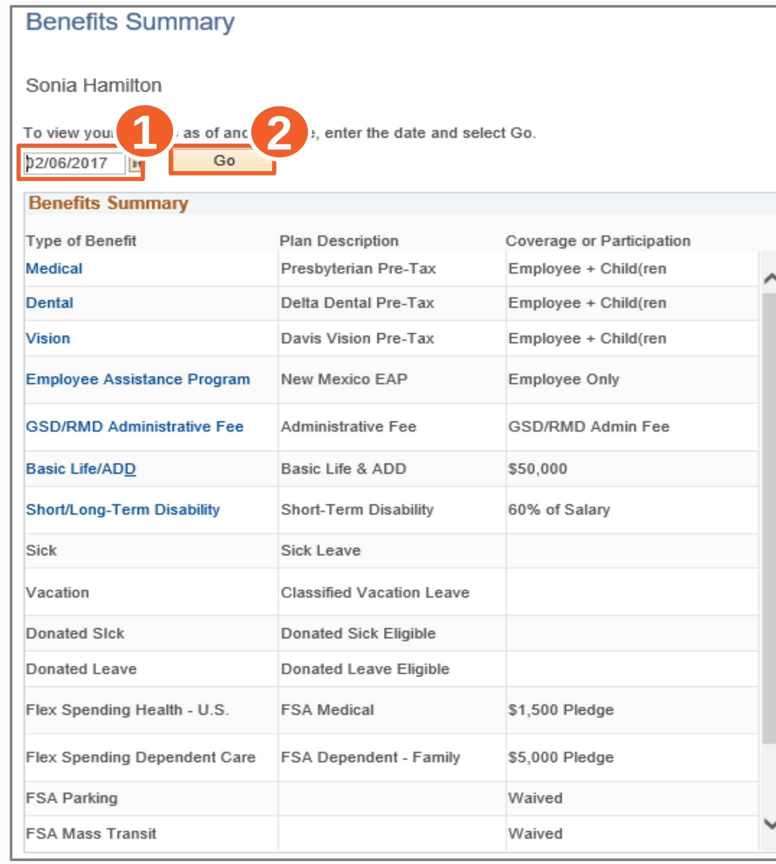
The **Benefit Summary** section provides information on your benefits with **Plan Description** and **Coverage** details.

Click > **NavBar** > **Navigator** > **Self Service** > **Benefits** > **Benefits Summary**

This section allows you to view plans you and your dependents/beneficiaries are enrolled in.

Follow the steps below to view your **Benefits Summary**:

1. Select > **Date**
2. Select > **Go**


Benefits Summary

Sonia Hamilton

To view you 1 as of anc 2 , enter the date and select Go.

02/06/2017 Go

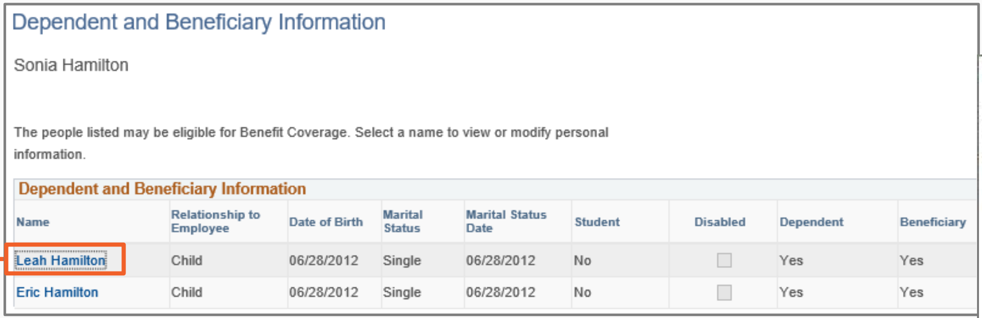
Benefits Summary

Type of Benefit	Plan Description	Coverage or Participation
Medical	Presbyterian Pre-Tax	Employee + Child(ren
Dental	Delta Dental Pre-Tax	Employee + Child(ren
Vision	Davis Vision Pre-Tax	Employee + Child(ren
Employee Assistance Program	New Mexico EAP	Employee Only
GSD/RMD Administrative Fee	Administrative Fee	GSD/RMD Admin Fee
Basic Life/ADD	Basic Life & ADD	$50,000
Short/Long-Term Disability	Short-Term Disability	60% of Salary
Sick	Sick Leave	
Vacation	Classified Vacation Leave	
Donated Sick	Donated Sick Eligible	
Donated Leave	Donated Leave Eligible	
Flex Spending Health - U.S.	FSA Medical	$1,500 Pledge
Flex Spending Dependent Care	FSA Dependent - Family	$5,000 Pledge
FSA Parking		Waived
FSA Mass Transit		Waived

View Dependent/Beneficiary Information

SHARE 9.2 allows you to view your dependents and their benefit plans. Follow the navigation path below to access the **Dependent/Beneficiary Information** section:

Click > **NavBar** > **Navigator** > **Self Service** > **Benefits** > **Dependent/Beneficiary Information**



Dependent and Beneficiary Information

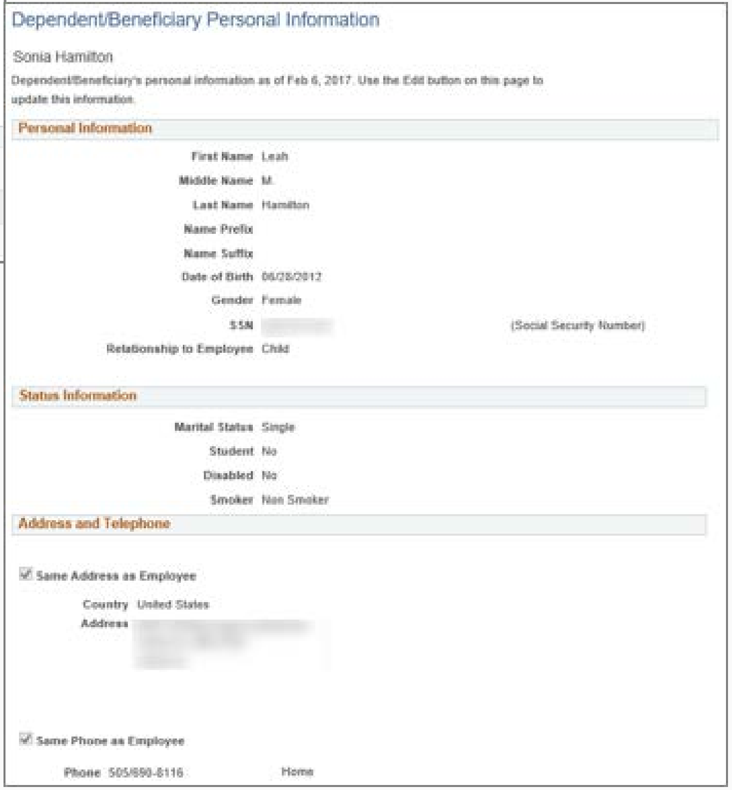
Sonia Hamilton

The people listed may be eligible for Benefit Coverage. Select a name to view or modify personal information.

Dependent and Beneficiary Information

Name	Relationship to Employee	Date of Birth	Marital Status	Marital Status Date	Student	Disabled	Dependent	Beneficiary
Leah Hamilton	Child	06/28/2012	Single	06/28/2012	No		Yes	Yes
Eric Hamilton	Child	06/28/2012	Single	06/28/2012	No		Yes	Yes

View your **Dependent and Beneficiary Information** here. Click a name to display the **Dependent/Beneficiary Personal Information.**



Dependent/Beneficiary Personal Information

Sonia Hamilton

Dependent/Beneficiary's personal information as of Feb 6, 2017. Use the Edit button on this page to update this information.

Personal Information

First Name Leah
Middle Name M.
Last Name Hamilton
Name Prefix
Name Suffix
Date of Birth 06/28/2012
Gender Female
SSN (Social Security Number)
Relationship to Employee Child

Status Information

Marital Status Single
Student No
Disabled No
Smoker Non Smoker

Address and Telephone

Same Address as Employee
Country United States
Address

Same Phone as Employee
Phone 505/890-8116 Home

View your Dependent/Beneficiary personal details.

View Benefits Summary

In this lesson we learned:

- ✓ How to navigate to the Benefits Section and its components
- ✓ The Flexible Spending Accounts section allows FSA enrolled employees to view detailed information such as annual pledge, balance, claims detail, and claims payment detail
- ✓ The HealthCare Dependent Summary displays benefits plans and allows you to view your covered dependent details under each plan
- ✓ The Benefits Summary section allows you to view plans you and your dependents/beneficiaries are enrolled in

Agenda

Course Introduction

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Course Summary

Lesson 4

SHARE

Course Summary

In this course we learned:

- ✓ Timesheets allows you to enter your time and view Reported Time, Summary, Leave/Compensatory Time, Exceptions, and Payable Time Details
- ✓ SHARE 9.2 allows you to modify your Address, Contact Details, Ethnic Group, and Emergency Contacts and submit a request to your HR Admin to modify your Name and/or Marital Status
- ✓ SHARE 9.2 allows you to view your paycheck related information in the Pay section. Paycheck Modeler allows you to perform “What If” scenarios
- ✓ The Benefit section provides information on your benefits, with Plan Description and Coverage details. SHARE 9.2 allows you to view your FSA and Health Care Dependent Summary

Help is Available!

You have additional resources available for support.

1. Ask your HR Administrator or other SHARE experts in your agency
2. Navigate to the SHARE Collaboration Center Job Aids section
3. Look at the Q&A Forum in the Share Collaboration Center
4. Submit a Helpdesk ticket to EnterpriseSupport Desk@state.nm.us