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:

District 115 employees will use:

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

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

   Tip: Fields marked with a red asterisk (*) are required.
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
Navigating the Employee Portal

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

   ![Forgot Your Password](image)

   Please enter your registered email address or user name below if you have forgotten your login information. A link will be emailed to reset your password.

   User Name or Email:

   Reset Password Cancel

   Contact the Employee Portal Administrator at admin@ourschool.edu if you do not remember your email address or user name.

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.

![Reset Your Password page](image)

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
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

<table>
<thead>
<tr>
<th>Link</th>
<th>Purpose</th>
<th>Page Ref</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Page</td>
<td>Click the <strong>Home Page</strong> link to return to the Home tab from another page in the Employee Interface.</td>
<td>N/A</td>
</tr>
<tr>
<td>Settings</td>
<td>Click the <strong>Settings</strong> link to configure your Employee Portal account settings.</td>
<td>Page 14</td>
</tr>
<tr>
<td>Directory</td>
<td>Click the <strong>Directory</strong> 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.</td>
<td>Page 20</td>
</tr>
<tr>
<td>Employer Forms</td>
<td>Click the <strong>Employer Forms</strong> link to view and print company forms.</td>
<td>Page 26</td>
</tr>
</tbody>
</table>
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.

![Settings page]

**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](image)

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](image)

   - **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: 
     - Update 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: 
     - Update Password

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.
Using the Home Tab

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](image)

   - **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
     - **Update Settings**
   - **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

   ![Your Calendar Settings](image)

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.
Using the Home Tab

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 *alia* to be included in the Company Directory. If the employee’s record in *alia* 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 *alia* 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 *alia*.

To view the Company Directory:

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

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/advises 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
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 checks 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

<table>
<thead>
<tr>
<th>Employee No</th>
<th>Employee Name</th>
<th>Check Date</th>
<th>Check No</th>
<th>Net Pay</th>
</tr>
</thead>
<tbody>
<tr>
<td>100528</td>
<td>Kristin Baker</td>
<td>01/04/2009</td>
<td>311397725</td>
<td>$2,050.00</td>
</tr>
<tr>
<td>1000628</td>
<td>Kristin Baker</td>
<td>01/04/2009</td>
<td>311397725</td>
<td>$172.93</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Pay Check/Advice</th>
<th>Pay Period Start</th>
<th>Pay Period End</th>
<th>Check Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Longbranch School District</td>
<td>04-14-2009</td>
<td>05-14-2009</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Deductions/Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
</tr>
<tr>
<td>0153 OFFICE PBW BENE DLIY</td>
</tr>
<tr>
<td>0201 401 K</td>
</tr>
<tr>
<td>0302 TRS DIS</td>
</tr>
<tr>
<td>0320 MED INSURANCE</td>
</tr>
<tr>
<td>0326 DENTAL INS</td>
</tr>
<tr>
<td>0345 AMT DISABILITY</td>
</tr>
<tr>
<td>1200 TAX EXCESS</td>
</tr>
<tr>
<td>1201 TRS EXCESS</td>
</tr>
<tr>
<td>1301 MEDICAL BENEFIT</td>
</tr>
<tr>
<td>1302 DENTAL</td>
</tr>
<tr>
<td>1501 WC PROF</td>
</tr>
<tr>
<td>1500 UI UNEMPLOYMENT</td>
</tr>
<tr>
<td>1501 TRS PAYTHRU</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Direct Deposit</th>
</tr>
</thead>
<tbody>
<tr>
<td>DFI Bank No</td>
</tr>
<tr>
<td>319570064</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Current</th>
</tr>
</thead>
<tbody>
<tr>
<td>DFI</td>
</tr>
<tr>
<td>YTD</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>8,481.51</td>
</tr>
<tr>
<td>645.31</td>
</tr>
<tr>
<td>6,476.09</td>
</tr>
<tr>
<td>54,619.93</td>
</tr>
</tbody>
</table>
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.

   ![View W-2s page](image)

   **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.
Using the Leaves Tab

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
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.
Using the Leaves Tab

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.

   ![Leave Details page]

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.
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

<table>
<thead>
<tr>
<th>Certificate No.</th>
<th>Certificate Type</th>
<th>Certificate Level</th>
<th>Received Date</th>
<th>Exp. Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>072159</td>
<td>STAN</td>
<td>PK-8.0</td>
<td>10/01/2006</td>
<td>09/30/2012</td>
</tr>
<tr>
<td>121232</td>
<td>ONY</td>
<td>ALL</td>
<td>01/01/2009</td>
<td>12/31/2009</td>
</tr>
<tr>
<td>0876543921</td>
<td>STAN</td>
<td>PK-8.0</td>
<td>11/19/2009</td>
<td>11/19/2019</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Link</th>
<th>Purpose</th>
<th>Page Ref</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Certificates</td>
<td>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.</td>
<td>Page 42</td>
</tr>
<tr>
<td>Expired Certificates</td>
<td>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.</td>
<td>Page 42</td>
</tr>
<tr>
<td>All Certificates</td>
<td>Click the All Certificates link to list all of your certifications, both active and expired.</td>
<td>Page 43</td>
</tr>
</tbody>
</table>
Using the Certificates Tab

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
Using the Certificates Tab

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
Using the Certificates Tab

Viewing Certificate Endorsements

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

**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.

![Endorsements Table]

<table>
<thead>
<tr>
<th>Type</th>
<th>Level</th>
<th>Description</th>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>ESL</td>
<td>2</td>
<td>Elementary Self-Contained</td>
<td>10/01/2006</td>
<td>09/30/2012</td>
</tr>
<tr>
<td>ESL</td>
<td>2</td>
<td>Kindergarten</td>
<td>10/01/2006</td>
<td>10/01/2012</td>
</tr>
<tr>
<td>PROF</td>
<td>1</td>
<td>Information Processing Technology</td>
<td>10/01/2006</td>
<td>09/30/2012</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Elementary Music</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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

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

<table>
<thead>
<tr>
<th>Link</th>
<th>Purpose</th>
<th>Page Ref</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Deductions</td>
<td>Click the <strong>Active Deductions</strong> link to list your current payroll deductions. This is the default view.</td>
<td>Page 47</td>
</tr>
<tr>
<td>All Deductions</td>
<td>Click the <strong>All Deductions</strong> link to list your current, future, and expired payroll deductions.</td>
<td>Page 47</td>
</tr>
<tr>
<td>Active Benefits</td>
<td>Click the <strong>Active Benefits</strong> link to list your current benefit packages.</td>
<td>Page 48</td>
</tr>
<tr>
<td>All Benefits</td>
<td>Click the <strong>All Benefits</strong> link to list your current, future, and expired benefit packages.</td>
<td>Page 49</td>
</tr>
</tbody>
</table>
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](image-url)
Using the Benefits and Deductions Tab

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
Using the Benefits and Deductions Tab

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

<table>
<thead>
<tr>
<th>Plan Description</th>
<th>Amount</th>
<th>Percent</th>
<th>Annual YTD</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>BCBS DISQ PO - BCAS</td>
<td>257.00</td>
<td></td>
<td>1,028.00</td>
<td>07/31/2005</td>
<td></td>
</tr>
<tr>
<td>DEN DISQ PO - DENTAL - SINGLE</td>
<td>24.56</td>
<td></td>
<td></td>
<td>07/31/2005</td>
<td></td>
</tr>
<tr>
<td>LT DISQ PO LF</td>
<td>4.15</td>
<td></td>
<td>4.60</td>
<td>07/31/2005</td>
<td></td>
</tr>
<tr>
<td>MED DISQ PO - MED REIMB</td>
<td>177.04</td>
<td></td>
<td>26.80</td>
<td>09/01/2005</td>
<td>09/30/2005</td>
</tr>
<tr>
<td>TREC Entity Contribution</td>
<td>0.50</td>
<td></td>
<td>26.80</td>
<td>09/01/2005</td>
<td></td>
</tr>
<tr>
<td>WCA DISQ PO - WKR CMP</td>
<td>0.48</td>
<td></td>
<td>18.55</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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

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

4. 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.

5. 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:

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 **Dependents** tab.

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

---

![Demographic Request](image-url)
Submitting a Request

4. 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

5. Complete the fields marked with a red asterisk (*) and any optional fields necessary.

   Tip: Press Tab to move from one field to another.

6. 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.

7. 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 Contact tab
Submitting a Request

4. 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

   ![Form](image)

5. Complete the fields marked with a red asterisk (*) and any optional fields necessary.

   Tip: Press Tab to move from one field to another.

6. 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.

7. Click Submit to submit the request for approval.

   Click Cancel to cancel the request.