

## Summary:

InSITE Employee Self Service (ESS) is a tool that allows employees to view (and in some cases update) their personal information. Each employee using ESS will be able to view their information only. In addition to ESS, managers will have access to Manager Self Service (MSS). With MSS managers can view non-confidential information for all employees within their direct reporting structure. Managers will not be able to view confidential employee information such as W-2 forms, paycheck details, and benefits information.

## Benefits/Features:

- Information can be viewed on-demand from any Web-enabled computer, without having to request the information from the departmental PALS.
- Employees can update their own address, telephone number, email address, and W-4 information.
- Employees and managers can view leave details for each leave taken (sick, annual and comp time).
- Information can be printed by right-clicking on a screen and selecting print.
- PALS will have more time to perform other primary job functions because they will be researching and responding to fewer inquiries for this information from managers and employees.

**Timing:** InSITE ESS/MSS was rolled out to members Summer of 2010.

## What Managers can view with InSITE MSS

With the Manager Self Service (MSS) functionality, managers will have access to employee information contained in six links: **My Employee Information, Personal Information, Special Information, Extra Information, Emergency Contact Information and Documents of Record.** In all of these links, managers will see a list of the employees within their reporting structure (with relevant information appropriate for that section), and they can drill down into the details for a particular employee by clicking on the employee's name. **All information is "view only."**

### My Employee Information:

- Employment tab: Displays a list of employees with the following: employee name; employee number; latest hire date; position and title, grade; assignment category (full-time, part-time, etc.); assignment status (Active, FML, Injury Leave, etc.); department; and work location. Clicking on an employee's name will display a detailed assignment history screen for that employee.
- Salary tab: Displays a list of employees with the following: employee name; salary; position title, grade and employee number. Clicking on an employee's name will display a detailed salary history screen for that employee.
- Performance tab: Displays a list of employees with the following: employee name; employee number; next review date; last review date; last review rating; and the related event (i.e. Merit, Adjusted Merit Date, Administrative Increase, etc.). Clicking on an employee's name will display a detailed performance history for that employee.
- Absence tab: Displays a list of employees with the following: employee name; the number of cumulative leave hours taken for sick, comp and annual since January 1, 2009, and the employee number. Clicking on an employee's name will display a detailed leave history by date (1/1/09 to the latest payroll run) of sick, annual, comp, executive, and personal leave (used by part-time employees only).

**Personal Information:** Details contain the employee's name, email address, date of birth, employee number, phone number(s), main address, and other address.

**Special Information:** Details contain the employee's name, employee number, and information (if entered) pertaining to the employee's department identification, emergency operations (Alpha Status), and equipment tracking.

**Extra Information:** Details in this sub-category contain extra information related to Police, Fire, and Parks & Recreation only. All employees can view the ethnic origin information from this menu.

**Emergency Contact Information:** Details contain the employee's emergency contact name, address, phone number(s) and contact order.

**Documents of Record:** Displays a list of electronic documents maintained in the Human Resource Management Information System (InSITE) as part of the employee's official personnel file (such as performance evaluations, new hire letter, promotion and career progression. Documents attached prior to April 16, 2012 will not be available via the Documents of Record menu. Employees can obtain a copy of these documents by contacting their supervisor or departmental Payroll and Leave Specialist (PALS).

## What Employees can view/update with InSITE ESS

With the Employee Self Service (ESS) functionality, each employee will have access to three main categories of information (their individual information only), the categories are **Human Resources**, **Payroll**, and **Benefits** and are described below.

### Human Resources

Under the Human Resources category, employees have access to four sub-categories of Human Resources related information, they are **My Information**, **Personal Information**, **Special Information**, and **Extra Information**.

**1. My Information (view only):** Summary information is displayed on the top half of the screen followed by four tabs of detailed information. The top of the screen contains employee number; department/division; manager's name; salary; last performance review date; last performance rating; position start date, title, and location. This summary information remains constant on the top of the screen as employees click to view the information on the four tabs of detail information within the My Information sub-category. The four tabs of detail information viewable by the employee are **Employment**, **Salary**, **Performance**, and **Absence**.

**Employment tab:** Displays assignment history information such as the assignment start date; assignment end date; position and title; grade; assignment category (full-time, part-time, etc.); department; and work location.

**Salary tab:** Displays salary history including the effective date of the salary; total amount of the increase/decrease; reason for the increase/decrease; annual salary; gross pay amount by pay period (salaried), or hourly rate for non-salaried; next review date; grade; and minimum and maximum salary for their range.

**Performance tab:** Displays performance history including the next review date; related event (i.e. Merit, Performance Improvement Plan); last review date and the rating they received.

### Payroll

Under the Payroll category, employees have access to four sub-categories of Payroll information, they are **Payslip**, **Payroll Payments**, **Tax Form**, and **Employee W-2**.

**1. Payslip (view only):** Displays an employee's complete payslip for a particular pay period (from 1/15/09 through the most recent pay period). Note: the payslip contains the employee's leave balances as of that pay period.

**2. Payroll Payments (view only):** Displays the employee's payroll direct deposit designations, including priority, payment type (deposit or check), account type (checking, savings, etc.), account number, amount type (monetary/percent), and amount.

**3. Tax Form (updatable):** Displays the employee's federal tax withholding information (W-4 form). Employees can update their filing status (single, married), number of allowances, additional withholding amount, and FIT (Federal Income Tax) Exempt status. Note: a link to the blank state form for VA is attached for convenience, but the state form information is not updatable in the system.

**4. Employee W-2 (view only):** Employees can view, print or save their W-2 form.

**Absence tab:** This tab displays a listing of sick, annual and comp leave taken (by date) since January 1, 2009, including the number of hours taken or credited back and the type of leave taken.

**2. Personal Information (address, email, and phone number are updatable, all other information is view only):** Displays the employee's name, date of birth, social security number, employee number, phone numbers, main address, email, and other address.

**3. Special Information (view only):** Displays the employee's name, employee number, and information (if entered) pertaining to the employee's department identification, emergency operations (Alpha Status), and equipment tracking

**4. Extra Information (view only):** This sub-category contains information related to Police, Fire, and Parks and Recreation only. All employees can view the ethnic origin information from this menu.

**5. Emergency Contact Information:** Details contain the employee's emergency contact name, address, phone number(s) and contact order.

**6. Documents of Record (view only):** Displays a list of electronic documents maintained in the Human Resource Management Information System (InSITE) as part of the employee's official personnel file (such as performance evaluations, new hire letter, promotion and career progression. Documents attached prior to April 16, 2012 will not be available via the Documents of Record menu. Employees can obtain a copy of these documents by contacting their supervisor or departmental Payroll and Leave Specialist (PALS).

## Benefits

**Benefits (view only):** Displays the employee's current benefits information, including the plan type (medical, dental, long-term disability, etc.); the option (employee only, employee + spouse, etc.); the coverage start date; coverage amount; pre-tax semi-monthly amount; and the post-tax semi-monthly amount. Employees can look back at historical changes made since InSITE went live on January 1, 2009.