Human Resources Management System

Employee Self Service User Guide

Office of Human Resources

University of Rochester Rochester, New York

HRMS Self-Service for Employees

Table of Contents

GENERAL INFORMATION

The Human Resources Management System (HRMS) has a new look! This document is a resource for navigating Employee Self Service pages. Before we get started, there are a few reminders:

- Passwords are case-sensitive and need to be entered the same way each time. Access to viewing information is strictly controlled. **DO NOT SHARE YOUR PASSWORD.**

- Anticipate a new look and feel for the recruitment pages and the applicant experience.

- Kiosks are available throughout the University and Medical Center for those without computer access. Find the locations of all kiosks by navigating to *Helpful Information* under Quick Links on the left.

- For assistance, call **ASK-URHR** (275-8747*)* or file a ticket with the **HR Service Desk** (service.rochester.edu).
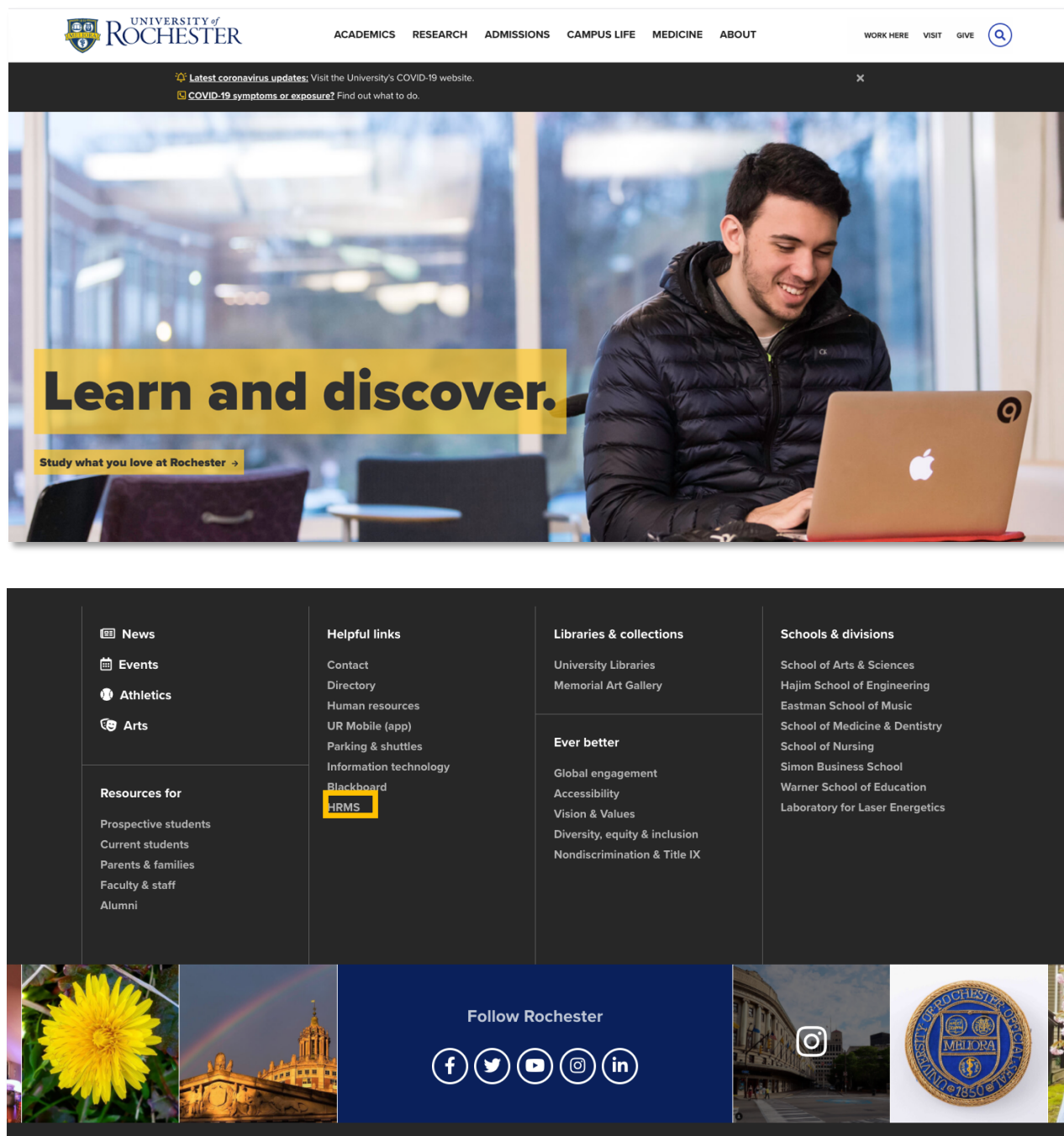
NetID and PASSWORD

Most individuals receive their NetID and password as part of orientation/onboarding, but visit University IT's NetID page or call 275-2000 for help initializing or managing your NetID. NetID will be your key for accessing multiple systems across the University and Medical Center.

HRMS LOGIN

1. From the UR homepage, scroll to the bottom of the page and select the link for HRMS under the Helpful links section. Or, in the search bar, visit www.rochester.edu/people. Bookmark the web address to quickly visit HRMS.

2. Type in your NetID and Password (both are case sensitive).

Once logged into HRMS, the **homepage** will appear.

SELF SERVICE: PERSONAL INFORMATION

Use the navigation below to view and/or edit your **Personal Details**.

Main Menu	→	Self Service	→	Personal Information	→	Personal Details
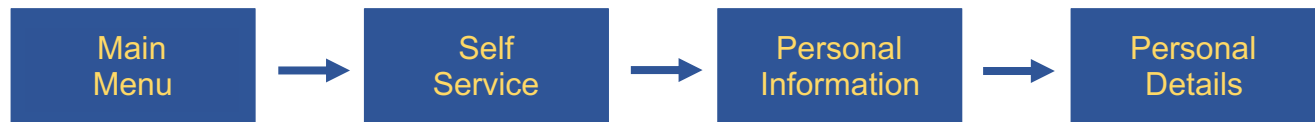
Select the "**+**" or "**>**" icons to add or make changes. Please note the **Save** button may be located in the upper-right corner of the dialog box.

> **Note:** Marital Status and/or Name Changes must be processed by HR. Please complete a *Personal Data Form* and send to the Office of Total Rewards, 60 Corporate Woods, Suite 310, PO Box 270453, Rochester, NY 14627 or it may be emailed to TotalRewards@rochester.edu. The form can be accessed from the HRMS menu under Quick Links for *Helpful Information,* then navigate to the icon for *Fill Out Forms*.

Sub-navigation within Personal Details

There are additional areas within the **Personal Details** section that were previously located in a different area. Please note some of the names of the pages/sections are slightly different:

- Race/Ethnicity/Language **is now** *Ethnic Groups*

- Disability **is still** *Disability*

- Veteran Status **is still** *Veteran Status*

📧 **Addresses**
📞 Contact Details
👥 Marital Status
👥 Ethnic Groups
📞 Emergency Contacts
👤 Additional Information
♿ Disability
👤 Veteran Status
👥 Preferred Language

SELF SERVICE: BENEFITS INFORMATION

Use the navigation below to view and/or edit your **Benefits Information**. The Benefits Information section within Self Service involves: Flexible Spending Accounts, Dependents and Beneficiaries, Tuition, Retirement Service Credit, and Benefits Enrollment, just to name a few areas.

Main Menu	➡	Self Service	➡	Personal Information	➡	(select the page that suits your interest)
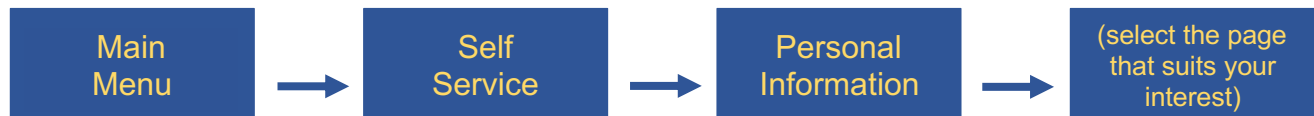
SELF SERVICE: PAYROLL AND COMPENSATION

Use the navigation below to view your **Pay** information.

Main Menu	➡	Self Service	➡	Payroll and Compensation	➡	**Pay**

View select or all of your paycheck statements. This page will highlight the check date, company, pay begin/end dates, your net pay and the paycheck number. Use the "**>**" to the PDF of your paycheck statement.

Note: An employee can access their paycheck from the HRMS homepage. Under the Quick Links section on the HRMS homepage, select *View Paycheck*. Select the desired Check Date to bring up the PDF for that pay period. PDF statements will display Year-to-Date balances and will print to one-page, if desired.

SELF SERVICE: PAYROLL AND COMPENSATION

Use the navigation below to view your **Direct Deposit** information.

| Main Menu | → | Self Service | → | Payroll and Compensation | → | **Direct Deposit** |

Direct Deposit

By submitting a direct deposit request or change, I authorize my wage payment to be sent to the designated financial institution(s) to be deposited into the specified account(s). The authority is to remain in full force and effect until the Payroll Office has received notification from me of its termination in such time and in such manner as to afford the University of Rochester a reasonable opportunity to act on it. I also understand that the University of Rochester will cancel direct deposit within 60 days in the event I separate from service. Further, I agree not to hold the University of Rochester responsible for any delay or loss of funds due to incorrect or incomplete information supplied by me or by my financial institution or due to an error on the part of my financial institution in depositing funds to my account. In the event that University deposits funds erroneously into my account, I authorize the University of Rochester to debit my account for amount not to exceed the original amount of the erroneous credit.

Accounts

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent	
Last	Checking999	Direct Deposit			Checking	Remaining Balance	>

Direct Deposit: Adding Direct Deposit Information

1. To add an account, select the "**+**" button and a dialog box will appear, "Add Account."

2. Provide a nickname and payment method (direct deposit) for your account. In the appropriate fields within the Bank information section, provide the routing number and account number.

| Cancel | **Add Account** | Save |

| *Nickname | |
| *Payment Method | Direct Deposit ▼ |

Bank

Routing Number		ⓘ
Account Number	
Retype Account Number	

Pay Distribution

*Account Type	▼
*Deposit Type	▼
Amount or Percent	

The Routing Number and Account Number can be obtained from your check.

In the check there are three groups of numbers. The first group contains the nine digit routing number, the second provides the account number, and the third is the check number.
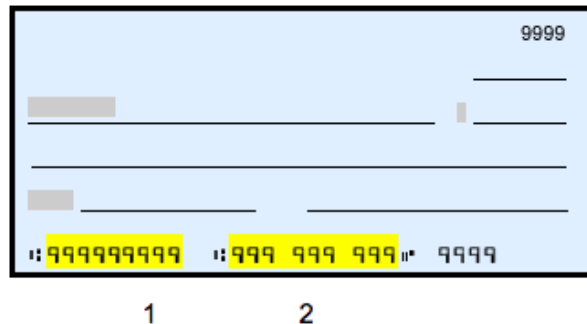
1 - Routing Number

2 - Account Number

Click the information icon for more insight about the location of the routing number and account number from a check.

3. Be sure to complete the areas on the form where the **asterisk** (*) appears, especially under the Pay Distribution section. Choose **Account Type** from drop-down box (Checking, Savings). Choose Deposit Type (Amount, Percent, Remaining Balance).

4. Type in the exact dollar Amount or Percent of pay. If you:

   ▪ want your entire pay to go to one account, type in 100%.

   ▪ are going to use more than one account for your direct deposit, type in either a dollar amount or percent desired in this first account.

5. Select the **Save** button.

If you want your pay to be deposited in **more than one account**:

▪ Select *Add Account* again and repeat the above directions.

▪ Select the **Save** button.

Note: You are responsible for ensuring your information is correct. Be sure your final amounts add up to 100%, or you will receive a 'live' check for the balance. You could receive a "pop up" message regarding the distribution of your pay with your bank accounts. That message will read:

More than 100% combined has been allocated for your direct deposit accounts. Change one of the accounts with a percent to have Deposit Type = Remaining Balance or to an Amount.

Direct Deposit: Removing an Account

1. To modify your Direct Deposit account, select the "**>**" button and a dialog box will appear.

2. Click **Remove**, then the **Save** button.

Note: If you remove the account, you will not be able to add a new account(s) until the following business day.

SELF SERVICE: PAYROLL AND COMPENSATION

Use the navigation below to view your **Compensation History** information.

Main Menu	→	Self Service	→	Payroll and Compensation	→	**Compensation History**
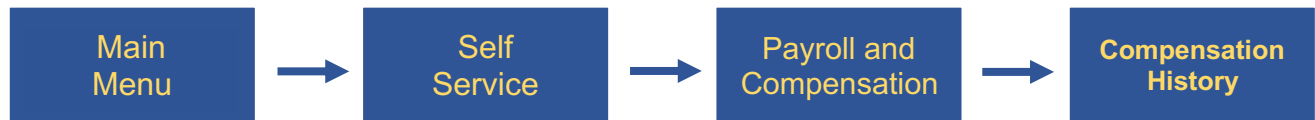
View your compensation history with the University/Medical Center. You will be able to view the date of change, the amount, the salary change amount, salary change percent, and the type of change to your salary.

SELF SERVICE: PAYROLL AND COMPENSATION

Use the navigation below to view your **Tax** information.

Main Menu	→	Self Service	→	Payroll and Compensation	→	▪ W4 Tax Information ▪ IT-2104 NYS Tax Information ▪ View W2/W2c Forms ▪ W2/W2c Consent
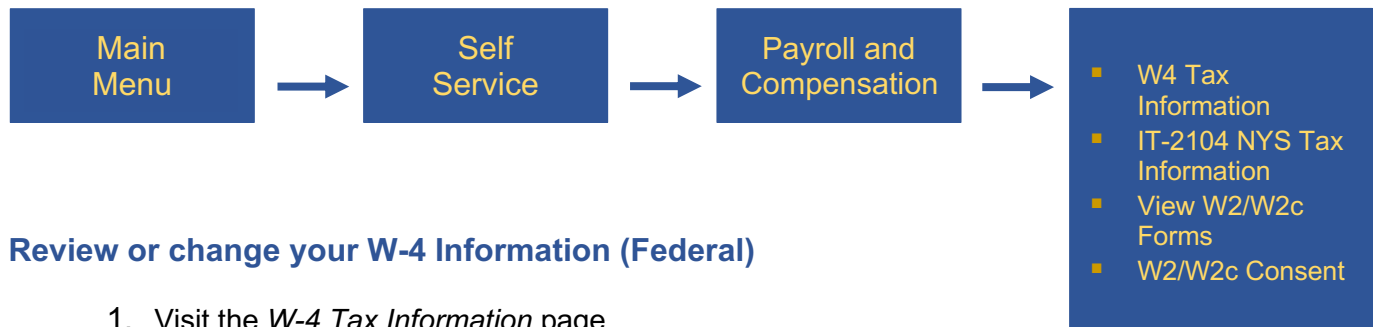
Review or change your W-4 Information (Federal)

1. Visit the *W-4 Tax Information* page.

2. Edit the information (changes are effective immediately), then select the **Submit** button at the bottom of the page.

Review and edit your NYS withholding exemption amount (IT-2104)

1. Visit the *IT-2014 NYS Tax Information* page.

2. Edit the information (changes are effective immediately), then select the **Submit** button at the bottom of the page.

CAPTURING TIME

HRMS allows the University and Medical Center to remain compliant with NYS labor laws ensuring that everyone is paid correctly. For assistance with any of the processes outlined below, call ASK-URHR (275-8747), contact your timekeeper or submit a ticket via the HR Service Desk (service.rochester.edu).

Each department has selected permission levels for entering time (punch time and elapsed time). See your timekeeper for instructions on the level of permissions that have been selected for your department.

Time Entry: Employee Pages Overview

- Employees will be able to view one pay period on the screen.

  - **Biweekly** paid employees will see **two weeks of time**;

  - **Semi-monthly** paid employees will see the **first 15 or last 15 days of the month**; and

  - **Monthly** paid employees will see the **full month** displayed on the screen.

- It is important to accurately maintain a record of time worked and not worked; all hourly employees' time worked must be recorded and compensated **to the minute.**

- Hourly paid employee and student time is reported in Punches*;* all non-work time (for hourly and salaried employees) is reported as Elapsed Time. Holidays are system generated and the system will calculate the appropriate pay.

- If your department elects, future-dated events can be entered; the system will not process the dates until the appropriate pay cycle.

CAPTURING TIME
WEB CLOCK for HOURLY PAID EMPLOYEES

Badge Reader users swipe their ID badges using Kronos clocks. Employees with multiple jobs may need to enter the correct Employee Record Number after swiping.

To view additional information on using the clocks and their locations, use the following navigation from the HRMS homepage:

| HRMS Homepage | → | Quick Links | → | Helpful Information | → | **User Manuals** |
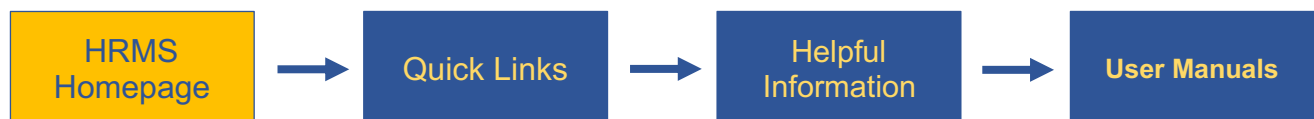
1. Kronos Clock Guide for 4500 and InTouch Models
2. Kronos Clock Locations

Using the Web Clock to Record Time

MBONNY

Favorites ▾   Main Menu ▾

Quick Links

🕐 Web Clock
🟠 Time Entry - Employee
🟢 View Paycheck
❓ Helpful Information

1 Access the **Web Clock** on the **HRMS homepage** under **Quick Links**.

Favorites ▾   Main Menu ▾   > Web Clock

Web Clock

2 If the employee has multiple jobs, the Web Clock page will ask them to select the job they are clocking for. **Note:** This feature only appears for staff with multiple jobs.

Select Job
Please Select Correct Job. 🔍

3 If applicable, the employee's last punch will display.

Your Last Recorded Punch
Out at 2:00:00PM

Enter Punch ❓

*Punch Type In   ▾   Enter Punch
Time Zone EST   Eastern Time

▾ **Time Reporting Elements**

Day Wednesday
Current Time 08/21/19 10:23AM   Refresh Time
ute Override ____ 🔍
ute Override ____ 🔍
Call In ____ 🔍

4 The system will suggest a punch type based on the last punch recorded, but this can be changed by using the drop-down to select.

Comments [_____]
254 characters remaining
Enter Punch

Web Clock

5

The first time that time is recorded, the entry type (In or Out) will need to be selected using the drop-down menu.

Employee ID 201077
Employment Record 0

Enter Punch ?

*Punch Type [_____▼]   [Enter Punch]

Time Zone
- In
- Out
- Transfer

▼ **Time Reporting Elements**

Day

Current Time 05/02/16 9:21AM   [Refresh Time]

1st Meal Minute Override [_____] 🔍

2nd Meal Minute Override [_____] 🔍

Call In [_____] 🔍

Comments [_____]

254 characters remaining

6

Click **Enter Punch** to confirm your punch. You may use either button.

[Enter Punch]

Message

Your In punch was successfully recorded at 9:37:00AM. (13504,220)

[OK]

7

A popup message will confirm that your punch has been recorded. Click **Ok** to finish.

USING the TIME ENTRY-EMPLOYEE SCREEN to CAPTURE WORK and ELAPSED (NON-WORK) TIME

All time entered will appear on the Time Entry-Employee page regardless of how it was entered into the system (Badge Reader, Web Clock). All time entered in the system on other pages will also appear on the Time Entry–Employee Screen.

This screen allows you to enter time for an entire pay period. Biweekly, hourly paid (BWH) employees will see a two-week pay period, Semi-monthly paid employees (SMO) will see a 15-day pay period, and Monthly paid employees (MTH) will see a one-month period. Regular work days/weekends are blue; University holidays are peach to easily see the difference.

Entering Work Time Using the UR Time Entry - Employee Screen for Hourly Employees

Punch and Elapsed Time Detail
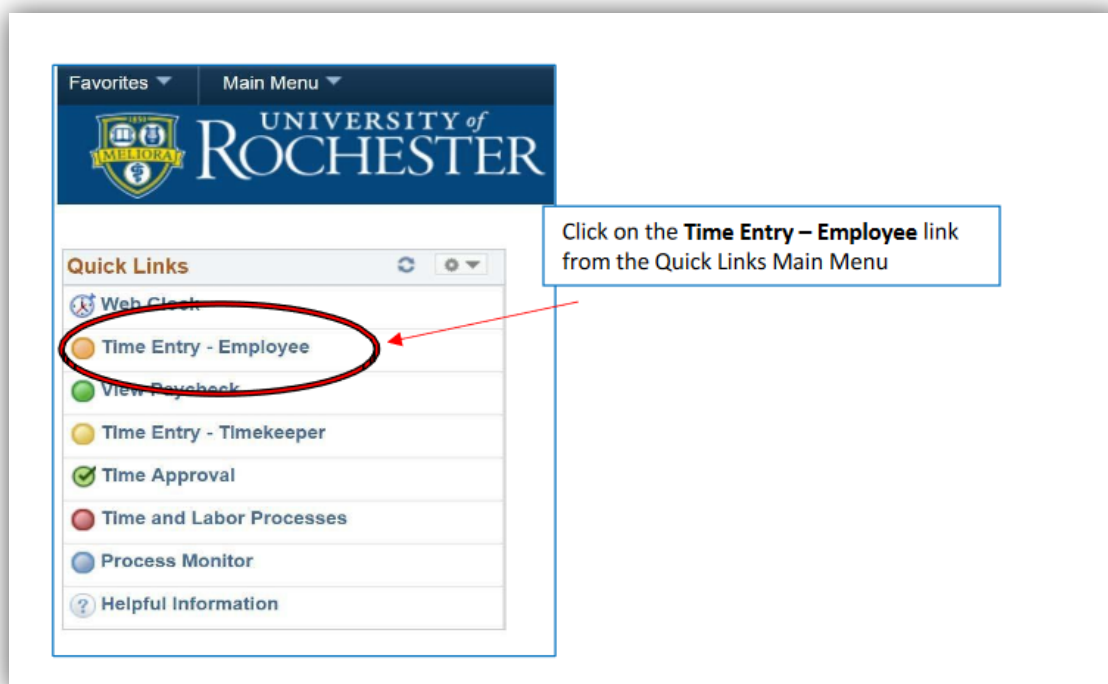
Your punch **in** will appear in this column. If you are **manually entering time**, enter your hours on this line. The HRMS system will default to "AM". If your shift starts in the afternoon or evening you must manually enter PM. Time must be captured **to the minute!**

Your punch **out** will appear in this column. If you are **manually entering time**, your shift end should be recorded here. If your shift ends in the afternoon or evening, you **will need to manually enter PM**.

HRMS will **automatically** calculate your hours worked and deduct your regularly scheduled lunch break. See your **timekeeper or manager** if your meal period is interrupted.

	Date	Day	In	Out	TRC	Amount /Hours /Units	1st Meal Minute Override	2nd Meal Minute Override	Transfer to Regular Shift	Call In	Taskgroup	FAO (Account)
1	10/06/2013	Sun										
2	10/07/2013	Mon	7:59AM	4:32PM		8.050000					UR DEF	
3	10/08/2013	Tue	8:01AM	4:29PM		7.966667					UR DEF	
4	10/09/2013	Wed	8:02AM	4:45PM		8.216667					UR DEF	
5	10/10/2013	Thu	8:00AM	5:15PM		8.750000					UR DEF	
6	10/11/2013	Fri										
7	10/12/2013	Sat										
8												
9												

To enter vacation, sick, PTO, or other **elapsed time** click on the magnifying glass to choose the appropriate **Time Reporting Code,** and enter the number of hours.

Name: Green,Gary
From Date: 08/01/2010 **End Date:** 08/14/2010 **Appointment End Dt:**
Workgroup: HOURLY11P **1st Meal Default:** 30 **2nd Meal Default:** **Std Hrs/Wk:** 40.00
Jobcode Title: Purchasing Asst **Department:** 100100 Purchasing

217051   1300   100.00

08/08/2010 Refresh Period

Customize | Find | First 1-14 of 1

	Date	Day	In	Out	TRC	Amount /Hours	1st Meal Minute Override	2nd Meal Minute Override	Transfer to Regular Shift	Call In	Taskgroup
		Sun									
	08/02/2010	Mon	7:59AM	4:25PM		7.933333					UR DE
	08/03/2010	Tue	7:55AM	4:32PM		8.116667					UR DE
	08/04/2010	Wed	8:01AM	4:31PM		8.000000					UR DE
	08/05/2010	Thu			VHA	8.00000					UR DE
	08/06/2010	Fri			JRH	8.00000					UR DE
	08/07/2010	Sat									
	08/08/2010	Sun									

Internet

Notes: If the time entered crosses a daybreaker into the next pay period, the time will appear at the top of the screen in the next pay period in green.

Additional dates cannot be added to the pay period. If other pay periods are needed, use the *Refresh Period* button and enter a new date for the desired pay period. Or, click on the *Next Period/Prev Period* buttons to move back or forward one pay period.

Correcting Time Entry Errors

1. If time has been incorrectly punched, select the minus sign and all times on that line will be cleared **OR** type over the existing punches and save.

2. If the time has already been approved and sent to Payroll, the change will be reflected in the next paycheck.

   If PM is not entered appropriately, the system will automatically enter the time as AM. This will result in too many hours reported for one shift. If the hours reported are incorrect, change the AM to PM **and** use the calendar icon (next to the out punch) to select the correct date.

   ## OR

   The *Undo Changes* button at the bottom of the screen can be used to cancel all changes made since the last time data was saved. **Use caution** since **all changes** made since the last save will be deleted.

Meal Minute Overrides - Overview

Hourly employees are entitled to a 30-minute, uninterrupted meal break **after 6 consecutive hours of work.** The Default meal time (your normal meal break) is automatically deducted by HRMS after more than 6 consecutive hours have been worked. Employees can take a meal break at any time; it does not need to be after 6 hours. An additional 30 minutes will be deducted after more than 15.5 consecutive hours are worked (16-hour shift).

If an hourly employee is called back to work (for an emergency) before a 30-minute, uninterrupted meal period has been taken, **they must be paid for the full 30 minutes**. If more than 30 minutes has been taken when they are called back early, however, the employee only needs to be paid for the **remainder** of their scheduled meal break.

Also, if an employee takes more time than their scheduled meal break, that time must be reported accurately to reflect the actual time taken.

If more than one hour is taken, employees need to punch out and then back in upon return to ensure shift differential is calculated appropriately.

Entering a Meal Minute Override:

1. Enter time taken for the meal in the appropriate column (either *1st* or *2nd Meal Minute Override*). In the example below, the meal period default is 60 minutes so the easy way to remember what to enter is: if you didn't take your usual meal time, what did you take? In the example below, the staff member took a 35minute meal break instead of the usual 60 minutes. The system will 'flash' after your changes to correct total hours worked for that day, then select Save.

<center>

1st Meal default: 60   05/02/2005 🗓 Refresh Period

Punch and Elapsed Time Detail   Customize | Find | 🖩   First ◀ 1-14 of 14 ▶ Last

	Date	Day	In	Out		TRC	Amount /Hours	1st Meal Minute Override	2nd Meal Minute Override	Transfer to Regular Shift		Call In	
➕ ➖	05/01/2005	Sun	8:14AM	5:00PM	🗓		7.766667	⌄	⌄		🗓		🔍
➕ ➖	05/02/2005	Mon	8:10AM	4:55PM	🗓		7.750000	⌄	⌄		🗓		🔍
➕ ➖	05/03/2005	Tue	7:57AM	5:02PM	🗓		8.500000	35 ⌄	⌄		🗓		🔍
➕ ➖	05/04/2005	Wed	8:00AM	4:59PM	🗓		7.983333	⌄	⌄		🗓		🔍

</center>

> 35 minutes taken for meal

Note: The information at the top of the page reflects the meal break of the **current** pay period. If a person transfers in the middle of a pay period and their default meal period changes, the change will be reflected beginning on the appropriate day.

Entering Elapsed (Non-work) Time for Hourly and Salaried Employees

1. On the correct day, use the lookup (magnifying glass) to select the correct elapsed time code (VHA, SIC, PTO, etc.). The system will 'flash'; tab to enter the correct number of hours under Amount.

2. Continue to enter all elapsed time for the pay period as necessary, then select Save.

3 vacation days

Correcting Elapsed (Non-work) Time Entry Errors:

1. If the day on which the time was entered is incorrect, select the minus sign to clear the line (or add an additional line if needed). If the amount and/or Time Reporting Code are incorrect, type over the existing numbers and save.

OR

The Undo Changes button at the bottom of the screen can be used to cancel all changes made since the last time data was saved. **Use caution** since **all changes** made since the last save will be deleted.

ON CALL and CALL IN

Employees are **on call** when they are not at work but are scheduled to be easily reached and come in on short notice. On-call pay is entered as a 'unit' or 'instance' of pay.

Entering 'On-Call' Status:

1. Select the appropriate Time Reporting Code from the On-call codes by using the magnifying glass for the appropriate day.

2. Enter *1* for **each instance** of **on-call pay,** then select Save.

An employee can be **called in** when:

- The employee was 'on call.'

- The employee was not 'on call' but is called in early before a shift.

- The employee is called back at the end of a shift or shortly after the shift ends.

- The employee is not 'on call' but is called in on their day off.

Entering a Call In

1. Enter the time the staff member began working in the In box.

2. In the Call In column, use the magnifying glass to look up the type of Call In.

3. Select the appropriate type of Call In, then *Save*.

Transfers to Regular Shift

If an employee has come to work before their usual start time because of a Call In, they may need to 'transfer' to their regular shift by entering a transfer punch. The employee does not need to punch out until they leave for the day.

Transferring to a regular shift:

1. Enter punch time for the beginning of the regular shift in the Transfer column, then select Save

Time employee came to work on a Call In

Time regular shift begins

2. The employee should punch out when they leave.

Fixing Missed Punches

If a staff member using a Badge Reader misses punches and the punches are recorded backwards (there is an 'In' punch that should be an 'Out' punch, or vice versa), the Fix Missed Punch button can be used, rather than correcting them manually.

Out punch is recorded as an AM, resulting in a 17.95-hour workday

1. Select the button for Fix Mixed Punch and use the lookup (magnifying glass) to find punches that need to be reversed.

2. Select first punch to switch, then select *OK*.

3. Repeat process to find last incorrect punch.

4. Select *OK*; punches will be corrected.

5. **ALWAYS** double-check to be sure punches are now in correct order on correct day.

Current Leave Bank Balances

The box directly below the Fix Missed Punch button shows the amount of time the staff member has earned or taken at the beginning of the current pay period. It also shows the remaining balance for vacation, PTO and Supplemental Banks. The staff member can only use the amount of hours showing under the Leave Hours Balance column (LvHrs Bal).

Plan type: PTO, vacation or Supplemental

Hours staff member can use this pay period

Hours adjusted *(HR use only)*

Exceptions

The box below the Current Leave Bank Balances is the Exception Report. It shows exceptions (coded as 'High') that need to be corrected before time is approved. The staff member will not be paid for time that is showing a High exception until it is corrected.

Correcting Exceptions:

1. Go back to the time entry portion of screen and overwrite with the correct information and save.

2. Corrections will be seen after Time Administration has run.

3. Go back into the system after an hour or two and check to be sure the correction was made.

Reviewing Current Payable Time

Below the Exception Report is a list of the time to be paid for this time period. Each type of time to be paid is listed separately (regular earnings, vacation, etc.). The total number of hours for the pay period appears at the bottom; all 'units' (for example, instances of being on-call) are listed separately. **All time must be approved by the department timekeeper before it will be paid.**

Unresolved Exceptions					Customize | Find | 🔲	First ◀ 1 of 1 ▶ Last
	Date Under Report	Exception ID	Severity	Description	Allowed	Status of Exception
1	04/28/2005	URTLX007	High	Missed OUT punch		Unresolved

Current Payable Time Totals			Customize | Find | 🔲	First ◀ 1-4 of 4 ▶ Last	
	TRC	Description	Total Hours	Total Amount	Total Units
1	*REG	Regular Earnings	60.575000		
2	*SIC	Sick	8.000000		
3	*VHA	Vacation Hourly	8.000000		
4	TOT	Total	76.575000		

Reviewing Prior Pay Period Payable Time

Below the Current Payable Time is a list of the time to be paid for previous time periods. Each type of time to be paid is listed separately (regular earnings, vacation, etc.) The total number of hours for that pay period appear at the bottom; all 'units' (for example, instances of being on call) are listed separately. Time will only appear in this box when adjustments were made after time had been processed and sent to Payroll. **All time must be approved by the department timekeeper before it will be paid.**

Current Payable Time Totals			Customize | Find | 🔲	First ◀ 1-4 of 4 ▶ Last	
	TRC	Description	Total Hours	Total Amount	Total Units
1	*REG	Regular Earnings	60.575000		
2	*SIC	Sick	8.000000		
3	*VHA	Vacation Hourly	8.000000		
4	TOT	Total	76.575000		

Prior Period Payable Time Totals			Customize | Find | 🔲	First ◀ 1-3 of 3 ▶ Last	
	TRC	Description	Total Hours	Total Amount	Total Units
1	*REG	Regular Earnings	0.234170		
2	*OT	Overtime	2.771380		
3	TOT	Total	3.005550		

Multiple Jobs

If you hold more than one job, use the Next in List button to scroll to your other position(s). **Always use caution when entering time to ensure time is recorded on the correct job.**

Employee Sign Off for Salaried Employees – *Optional*

1. Select *Time Entry–Employee* under Quick Links on the left and change the date to the last week of the pay period. Select the *Refresh Period button* if date changed.

2. Type in *1* on last day of pay period and select ESO (Employee Sign Off) from the drop-down box, then select Save.

Note: **This notifies the timekeeper that exception time has been reviewed.**

PAYABLE TIME DETAIL PAGE (View Only)

Navigate the following pathway and select the date for the desired pay cycle.

Main Menu → Self Service → Time Reporting → **Payable Time Detail**

1. Closed' on Detail Page means time has gone to Payroll.
2. 'Approved' means time has been approved but not necessarily sent to Payroll.