2017 - 2018

Time and Attendance
Self Service - Hourly
Training Guide

University of Massachusetts Boston
Human Resources Department

Revised: September 2017

Table of Contents

HR Direct Self Service

Login

Personal Information

Payroll and Compensation

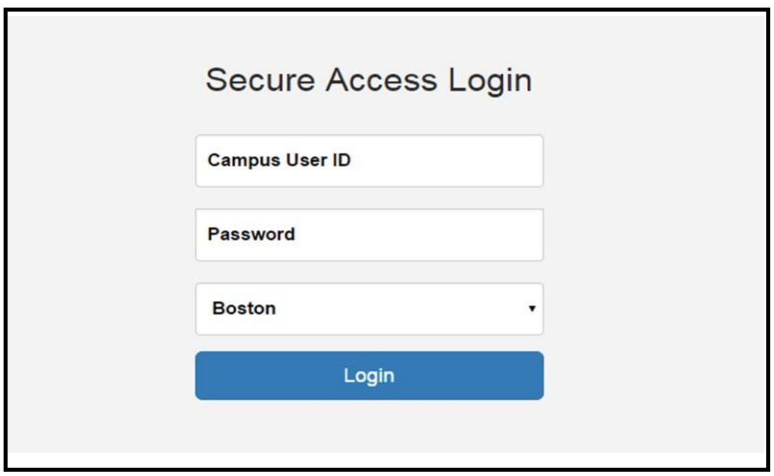
Time Reporting

Payroll Calendars

HR Direct Self Service

Login to HR Direct

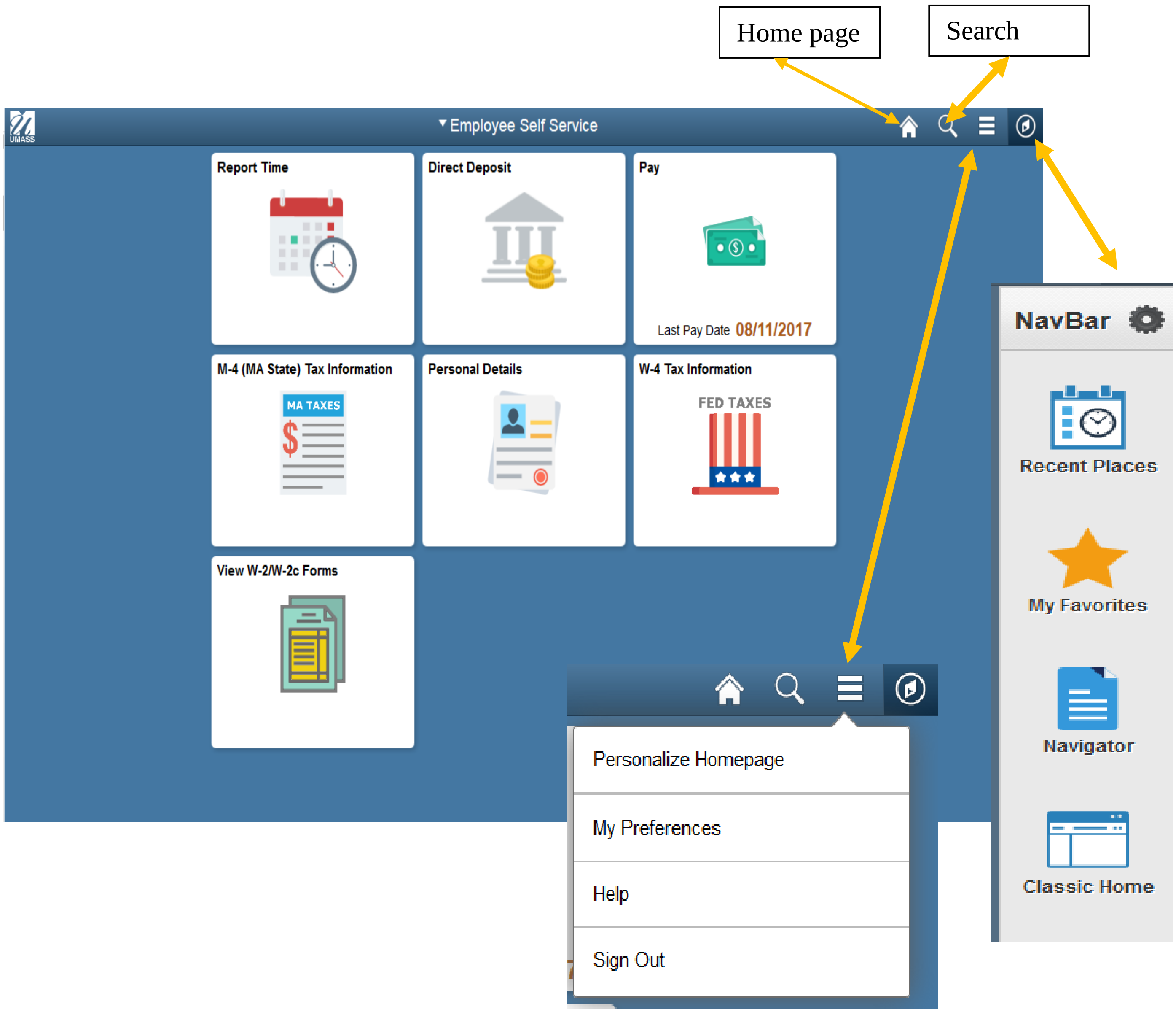
Step	Action
1.	Go to www.umb.edu/hr
2.	Click “ Log in to HR Direct”



Step	Action
3.	Enter your username (first name.lastname)
4.	Enter your password (password is you email password) Note: if your email password is changed your HR Direct login password will change.
5.	Click on the arrow and choose the campus (Boston)
6.	Click login
Note:	Please Note if you are using a public computer please always remember to sign out of the HR Direct system and do not save any passwords

Congratulations you have successfully logged into HR Direct

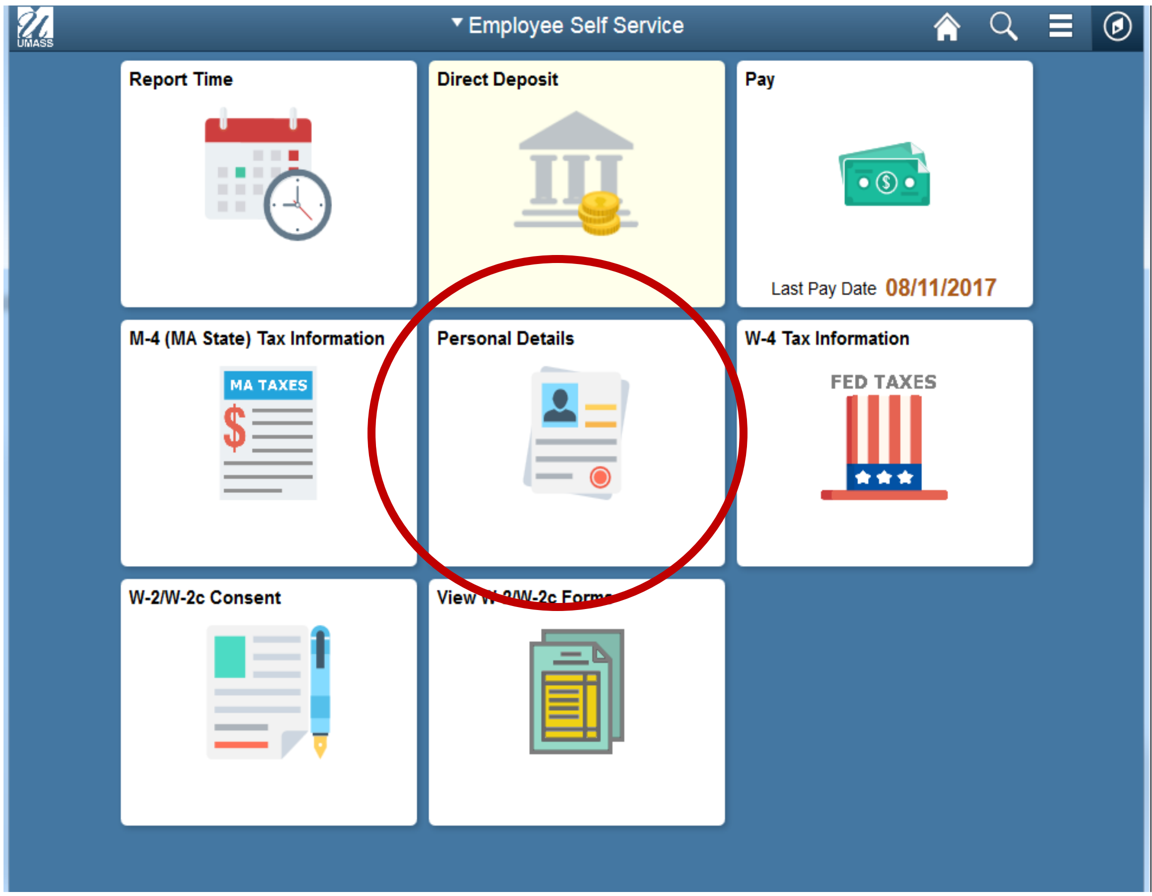
Once you log into the system you will be directed to your **Employee Self Service** Homepage. This would allow you to click on the preferred tile to view and complete a transaction.



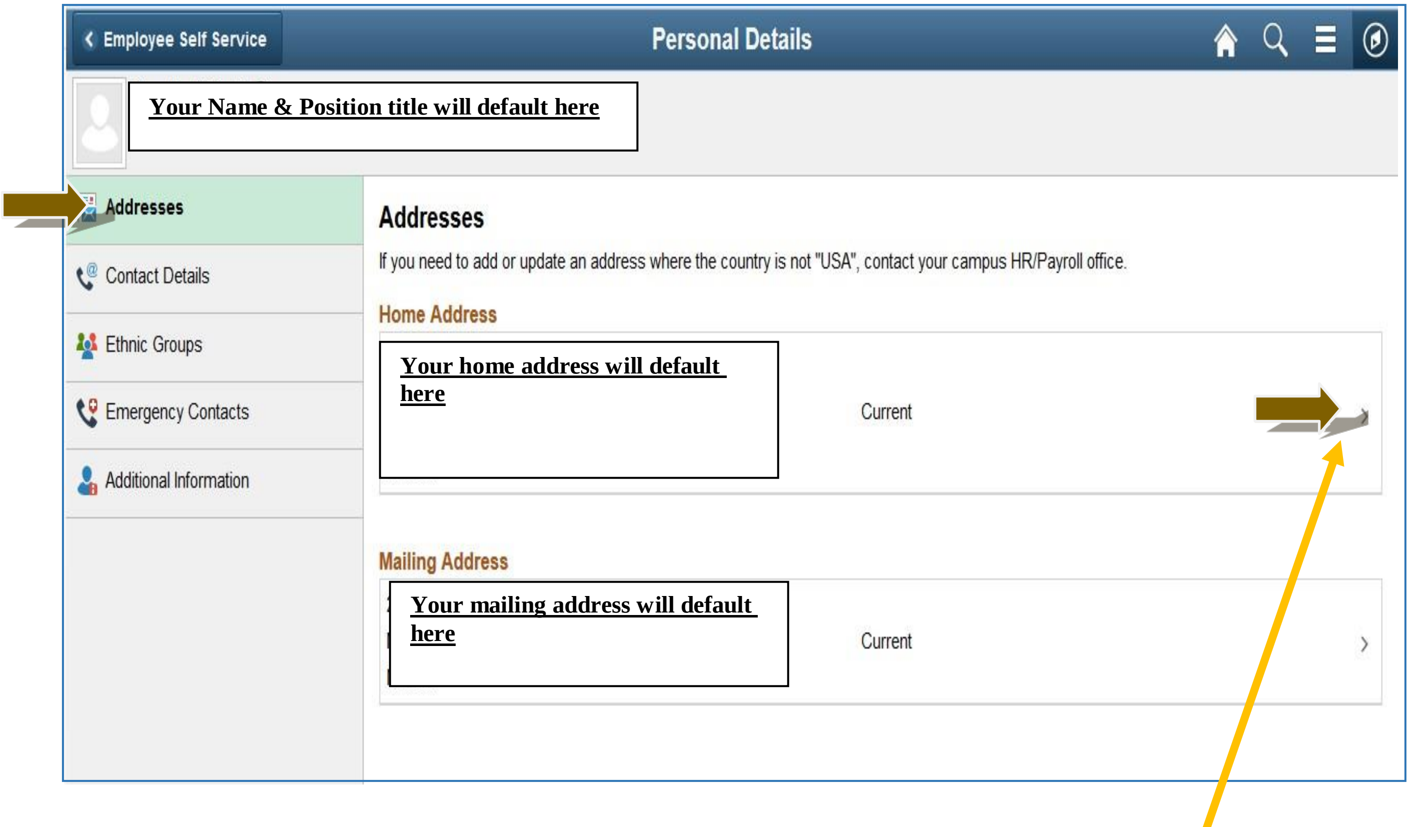
Personal Information

Upon completion of this topic, you will be able to review personal information, review and update your home and mailing address, add or update phone numbers, or specify your primary phone number, change your emergency contact and view additional information.

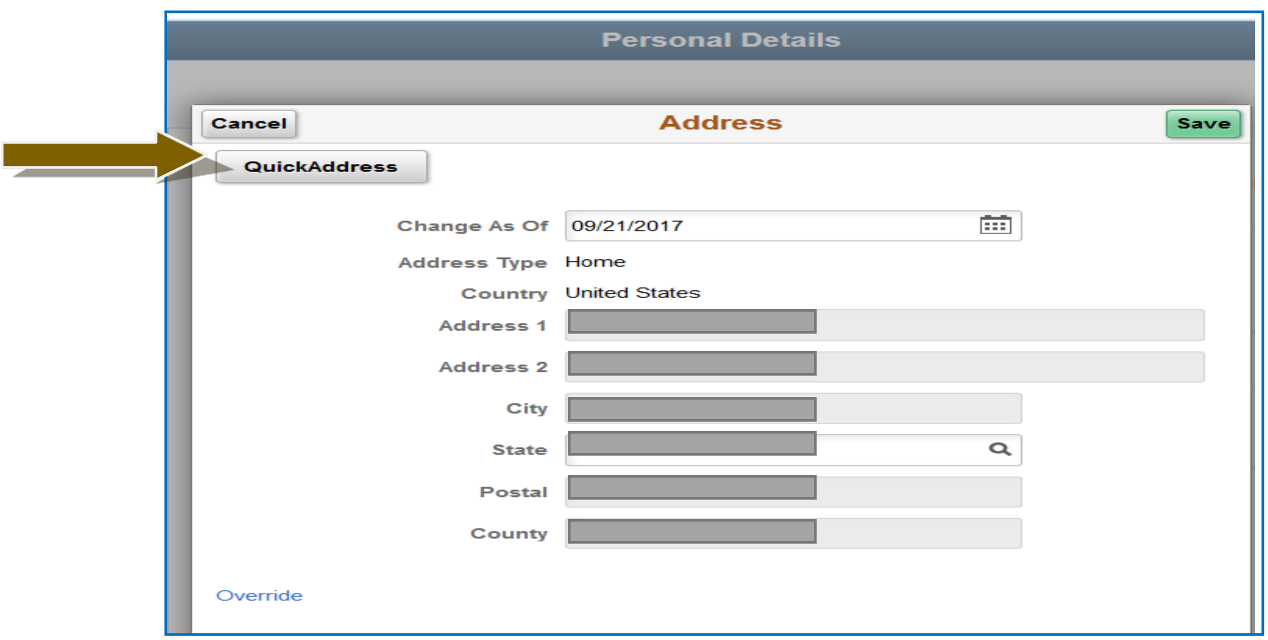
Click on the tile **Personal Details**



Click on **"Addresses"** on the left menu.



If you would like to change your Home Address and/or Mailing Address click on the arrow.



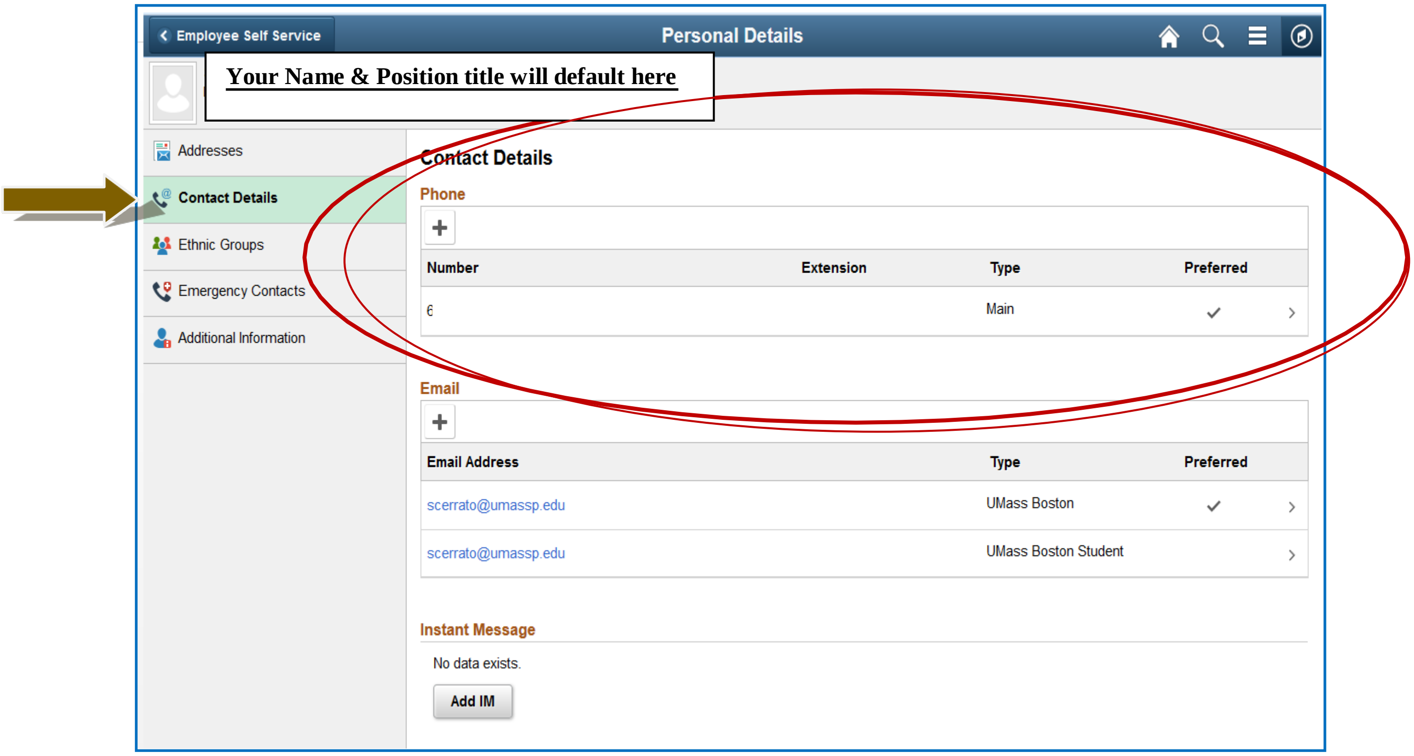
1.	To Edit and address click "**QuickAddress**"
2.	Enter the address into the appropriate fields.

2.	Enter the address into the appropriate fields.
3.	Click **Search**
4.	Information will auto populate click **Save**

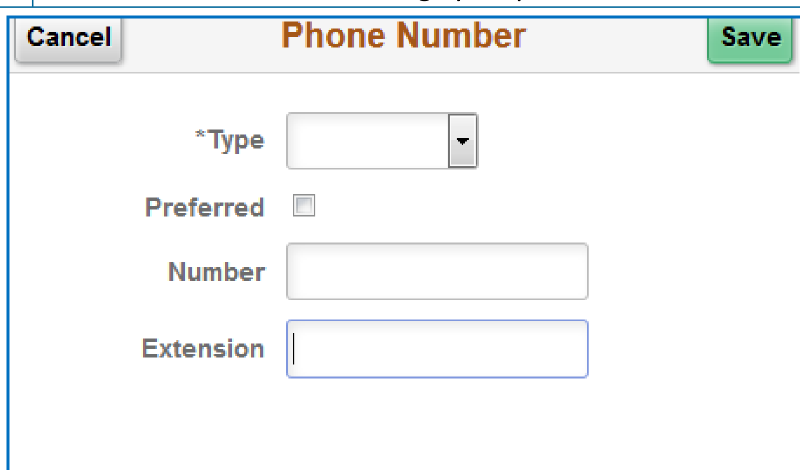
Congratulations you have successfully Added/Edited your Home and Mailing Address

Add/Edit Phone Number

Click on "**Contact Details**" on the left menu.



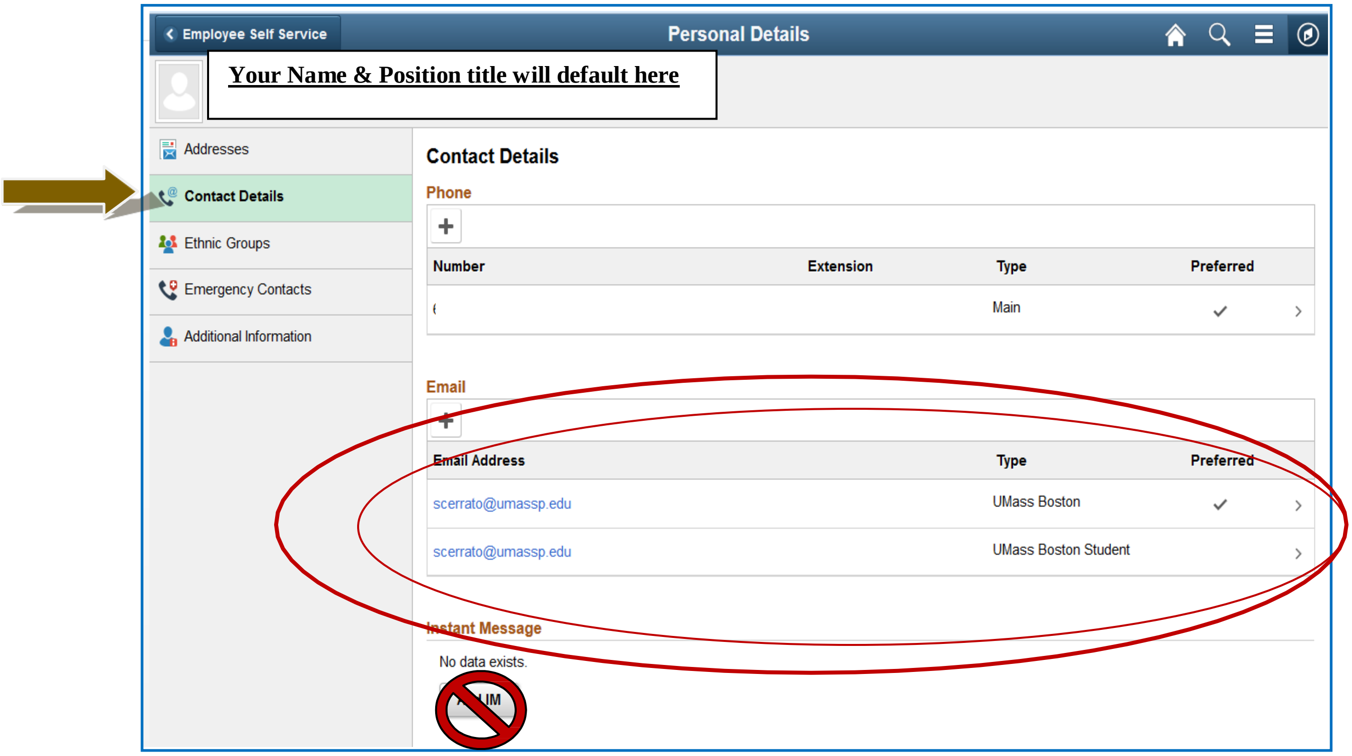
1.	Click on the **"+"** to add/change your phone number.



2.	Click "Type" dropdown menu and choose phone type i.e., home, work ,mobile, etc.
3.	Click **Save**

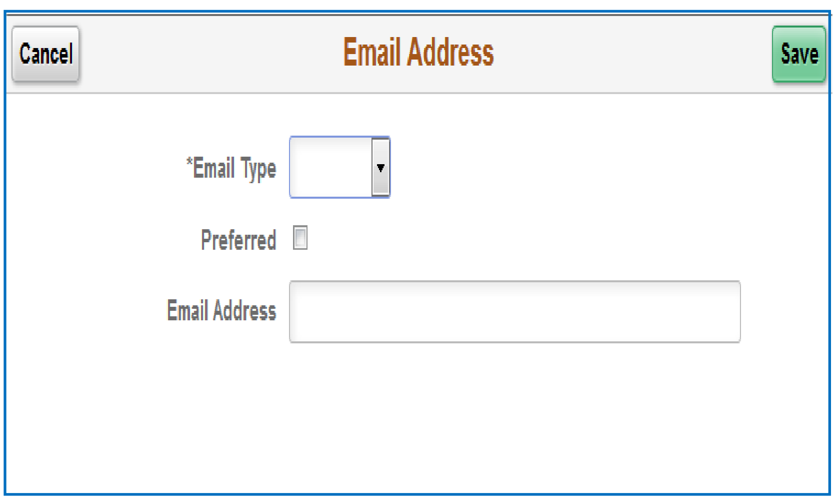
Congratulations you have successfully Added/Edited your Phone Number

Add/Edit email address



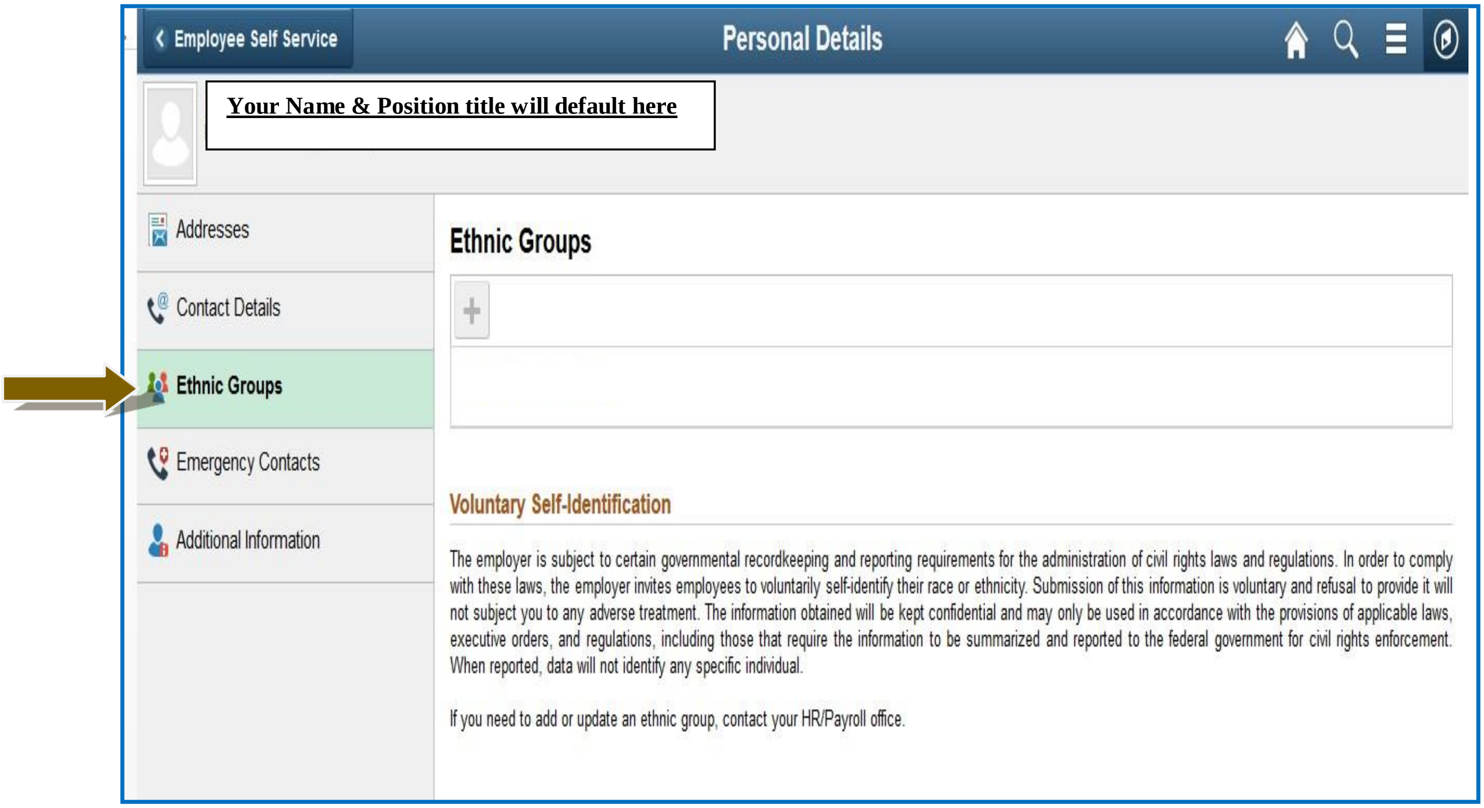
1.	Your email address will appear. Click on the **"+"** to add/change your phone number.

NOTE:	**The email address that appears is your UMB email address should not be deleted.** **This field " " is not active. DO NOT ENTER ANY INFORMATION**



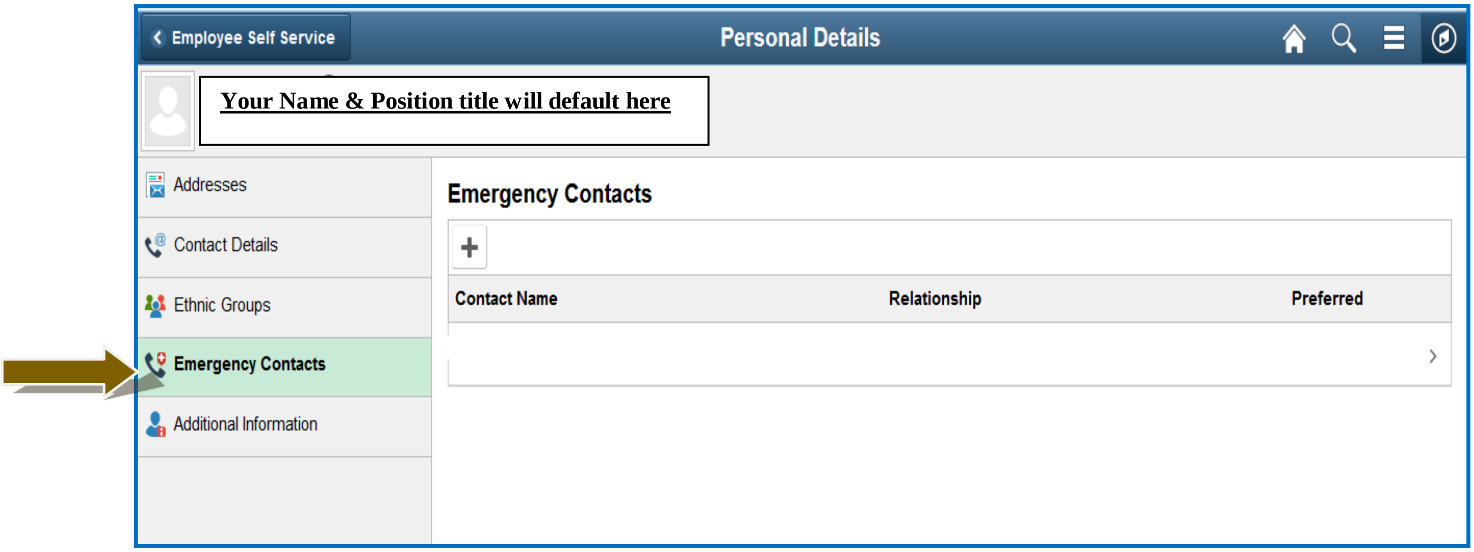
2.	Click "Email Type" dropdown menu and choose email type i.e., campus, home, etc.
3.	Click **Save**

Voluntary Self-Identification - View only

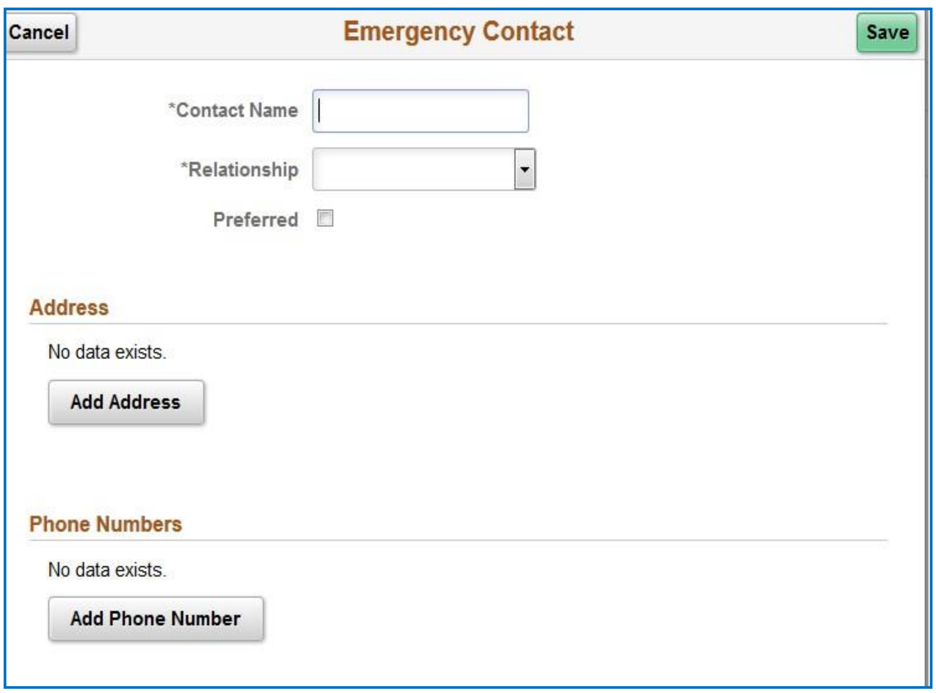


If you need to add/edit your data please contact Human Resources.

Add/EditEmergencyContacts

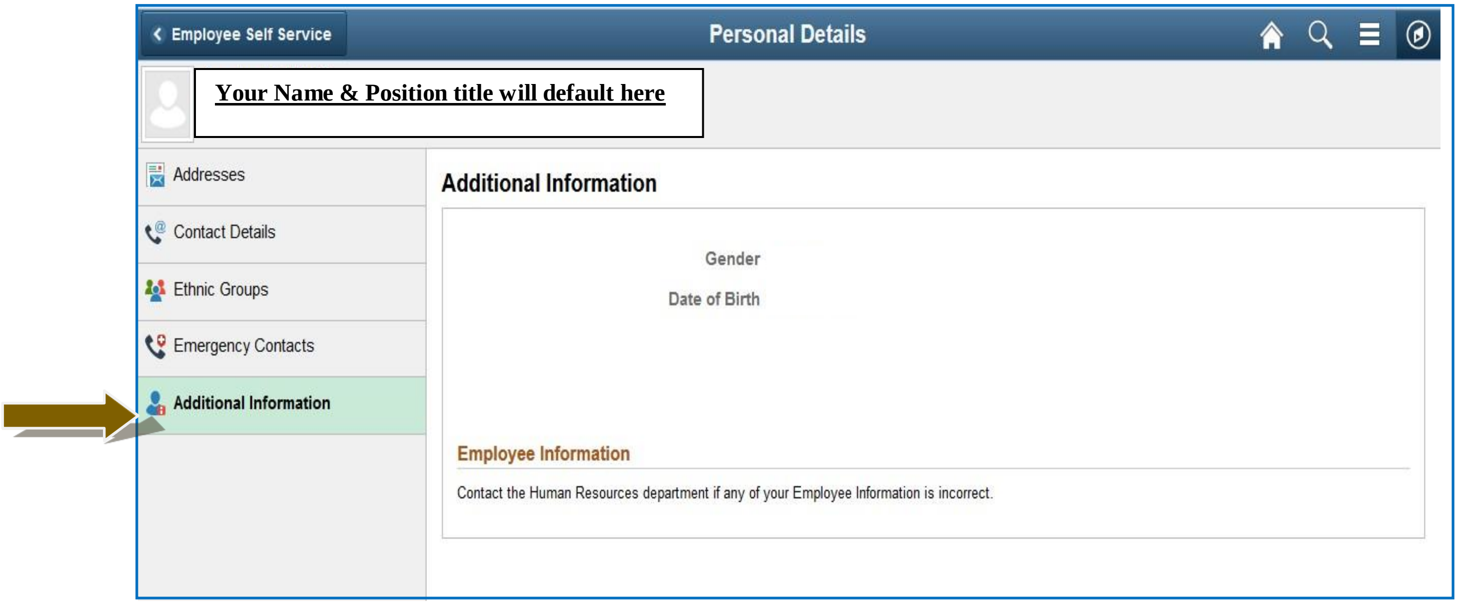


1.	Click on the **"+"** to add/change your **Emergency Contacts**.



2.	Enter **Contact Name**
3.	Click **"Relationship"** dropdown menu, choose either friend, parent, Child, etc.
	You have the ability to enter your emergency contacts by clicking on **Add Address** and/or **Add Phone Number.**
4.	Click **Save**

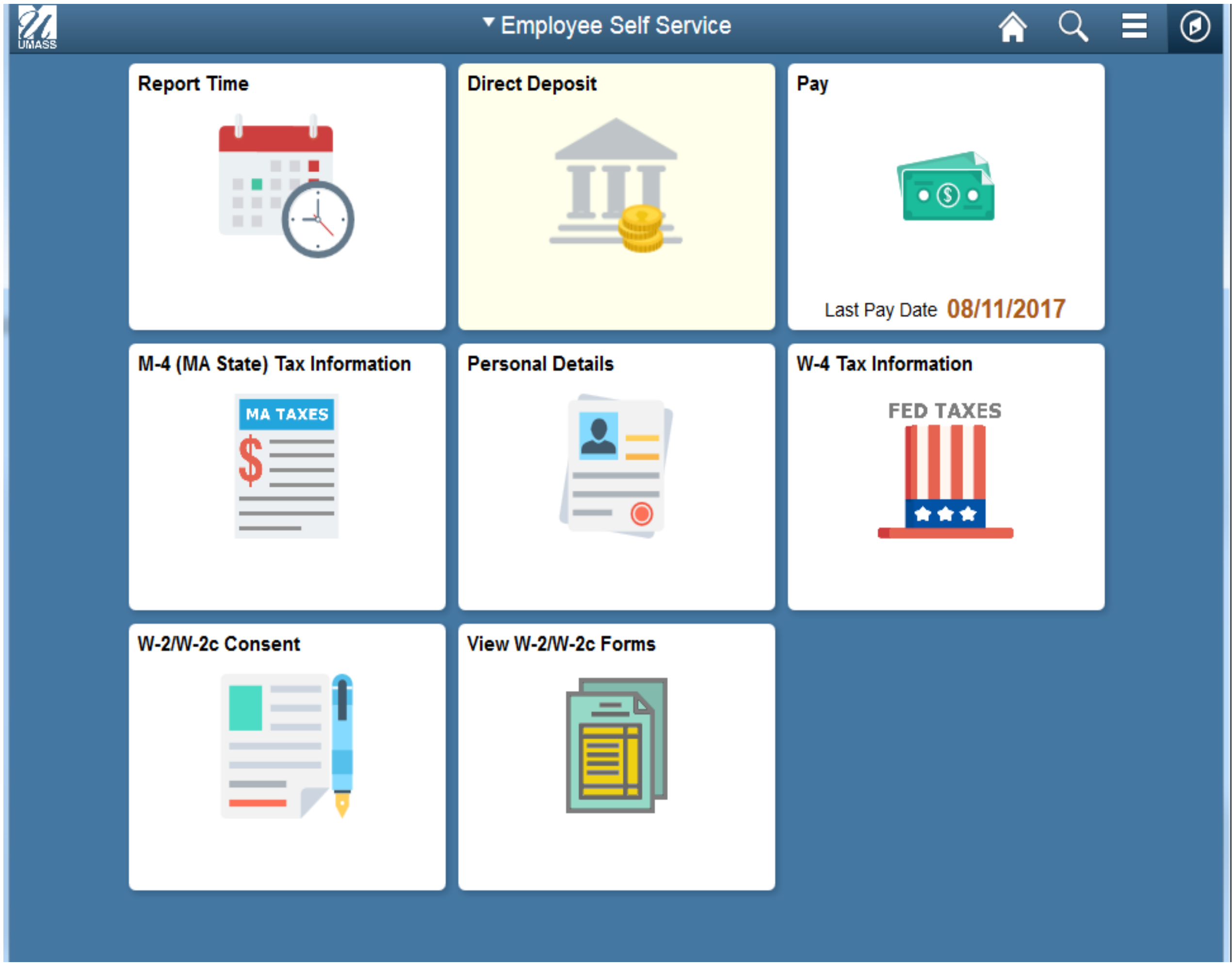
Additional Information – View Only



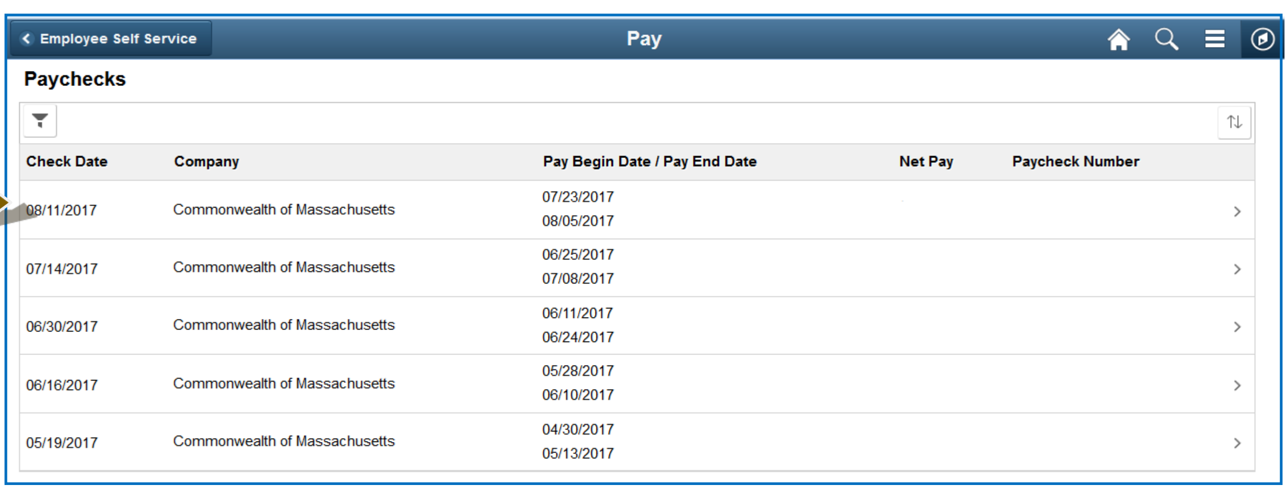
Please contact the Human Resources department if any of the information needs to be Added/Edited.

View your Pay Advice (Paycheck)

Click on the tile "**Pay**"



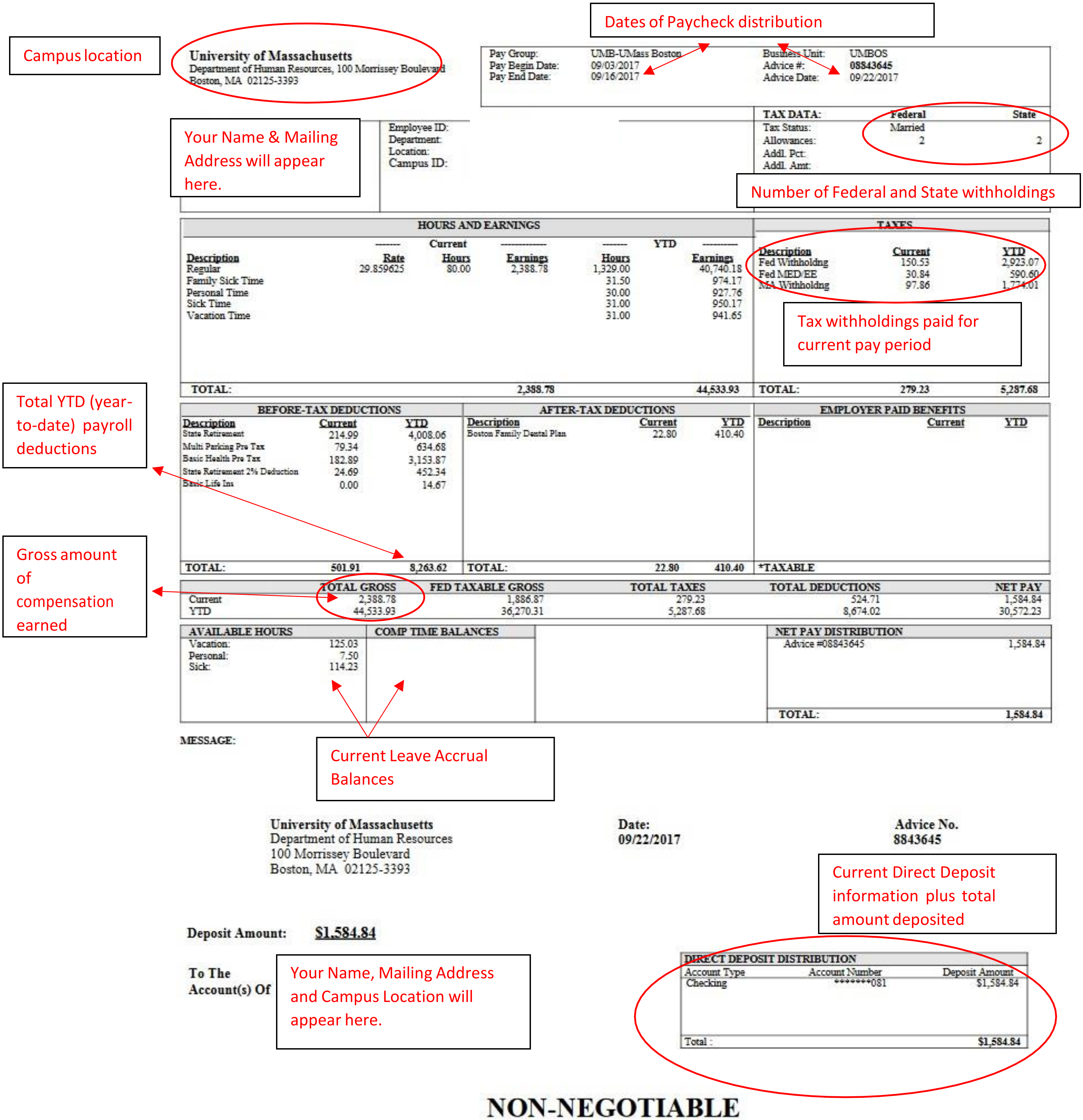
1. Click the Check date of the advice that you would like to view and your pay advice will appear.
   If you are unable to view your pay advice please turn off any pop up blockers on your computer.



Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number
08/11/2017	Commonwealth of Massachusetts	07/23/2017 08/05/2017		
07/14/2017	Commonwealth of Massachusetts	06/25/2017 07/08/2017		
06/30/2017	Commonwealth of Massachusetts	06/11/2017 06/24/2017		
06/16/2017	Commonwealth of Massachusetts	05/28/2017 06/10/2017		
05/19/2017	Commonwealth of Massachusetts	04/30/2017 05/13/2017		

View, Print, or Save your Pay Advice.

The Pay Advice will open as an Adobe PDF document which means you will need Adobe Acrobat on the desktop you use to access the information.



Campus location

Dates of Paycheck distribution

University of Massachusetts
Department of Human Resources, 100 Morrissey Boulevard
Boston, MA 02125-3393

Pay Group:	UMB-UMass Boston	Business Unit:	UMBOS
Pay Begin Date:	09/03/2017	Advice #:	**08843645**
Pay End Date:	09/16/2017	Advice Date:	09/22/2017

Your Name & Mailing Address will appear here.

Employee ID:
Department:
Location:
Campus ID:

TAX DATA:	Federal	State
Tax Status:	Married	
Allowances:	2	2
Addl. Pct:		
Addl. Amt:		

Number of Federal and State withholdings

HOURS AND EARNINGS

Description	Rate	Current Hours	Current Earnings	YTD Hours	YTD Earnings
Regular	29.859625	80.00	2,388.78	1,329.00	40,740.18
Family Sick Time				31.50	974.17
Personal Time				30.00	927.76
Sick Time				31.00	950.17
Vacation Time				31.00	941.65
TOTAL:			2,388.78		44,533.93

TAXES

Description	Current	YTD
Fed Withholdng	150.53	2,923.07
Fed MED/EE	30.84	590.60
MA Withholdng	97.86	1,774.01
TOTAL:	279.23	5,287.68

Tax withholdings paid for current pay period

Total YTD (year-to-date) payroll deductions

BEFORE-TAX DEDUCTIONS

Description	Current	YTD
State Retirement	214.99	4,008.06
Multi Parking Pre Tax	79.34	634.68
Basic Health Pre Tax	182.89	3,153.87
State Retirement 2% Deduction	24.69	452.34
Basic Life Ins	0.00	14.67
TOTAL:	501.91	8,263.62

AFTER-TAX DEDUCTIONS

Description	Current	YTD
Boston Family Dental Plan	22.80	410.40
TOTAL:	22.80	410.40

EMPLOYER PAID BENEFITS

Description	Current	YTD
*TAXABLE		

Gross amount of compensation earned

	TOTAL GROSS	FED TAXABLE GROSS	TOTAL TAXES	TOTAL DEDUCTIONS	NET PAY
Current	2,388.78	1,886.87	279.23	524.71	1,584.84
YTD	44,533.93	36,270.31	5,287.68	8,674.02	30,572.23

AVAILABLE HOURS

Vacation:	125.03
Personal:	7.50
Sick:	114.23

COMP TIME BALANCES

NET PAY DISTRIBUTION

Advice #08843645	1,584.84
TOTAL:	1,584.84

MESSAGE:

Current Leave Accrual Balances

University of Massachusetts
Department of Human Resources
100 Morrissey Boulevard
Boston, MA 02125-3393

Date:
09/22/2017

Advice No.
8843645

Current Direct Deposit information plus total amount deposited

Deposit Amount: **$1,584.84**

To The Account(s) Of

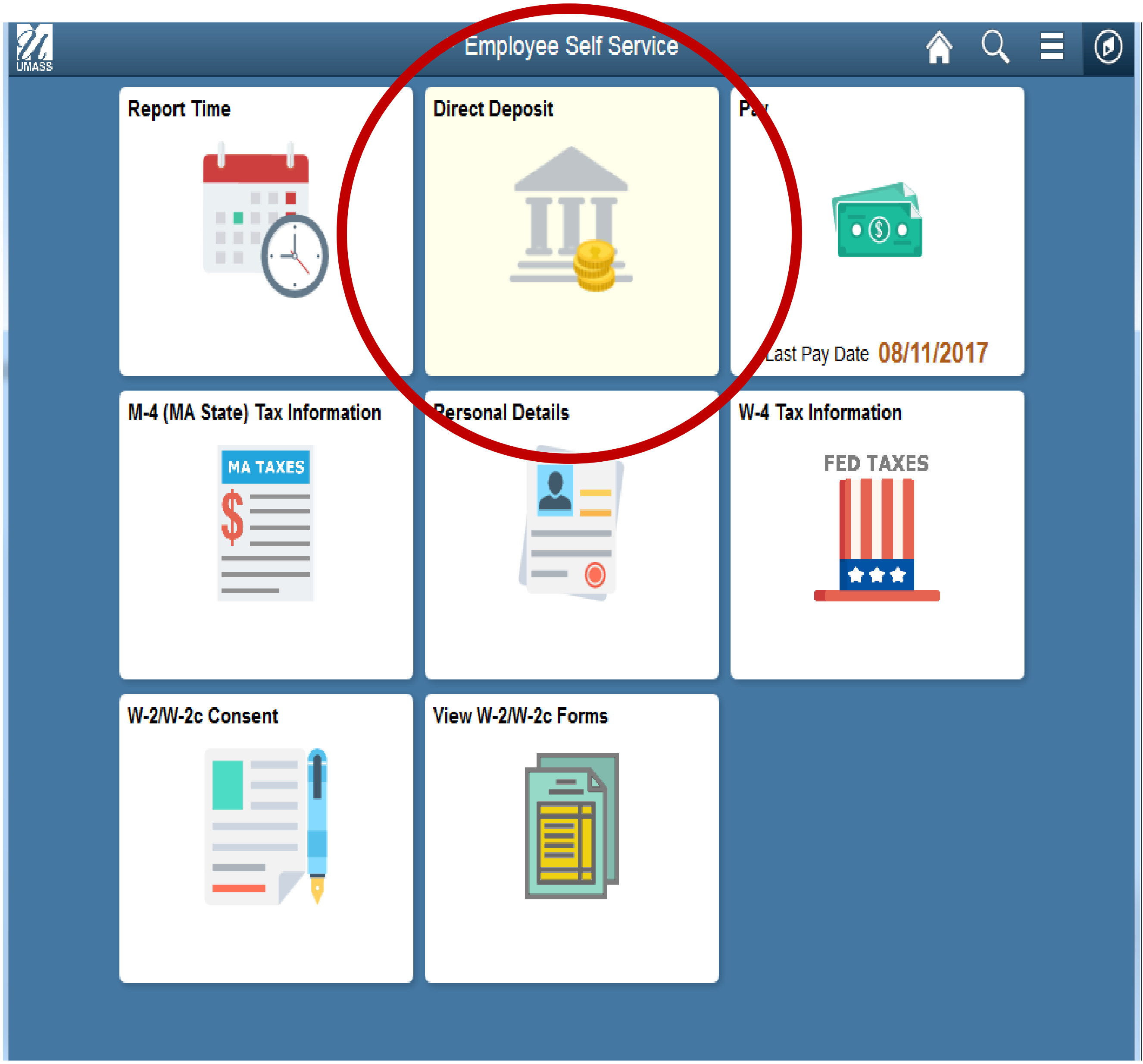
Your Name, Mailing Address and Campus Location will appear here.

DIRECT DEPOSIT DISTRIBUTION

Account Type	Account Number	Deposit Amount
Checking	*******081	$1,584.84
Total :		$1,584.84

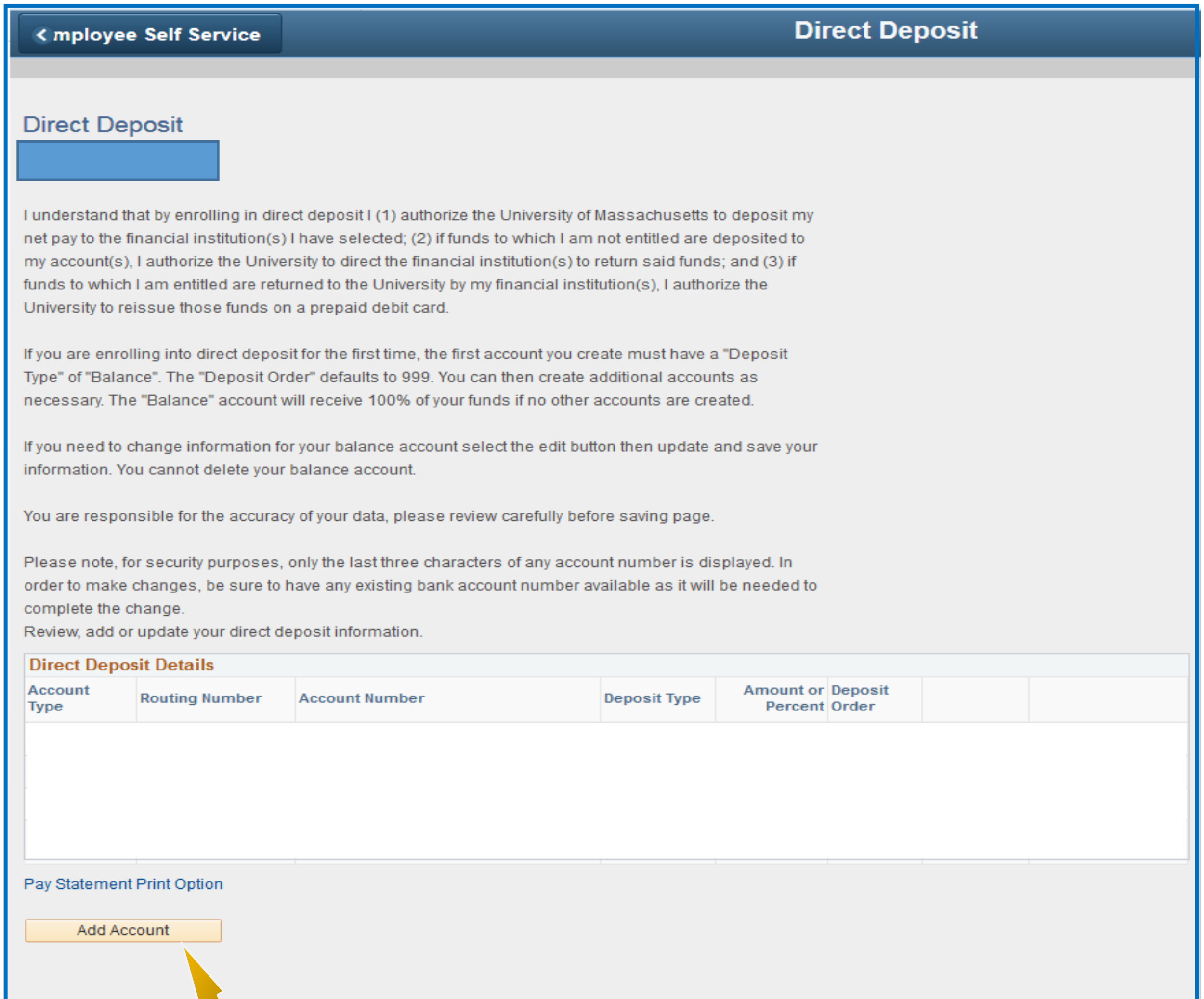
NON-NEGOTIABLE

Direct Deposit



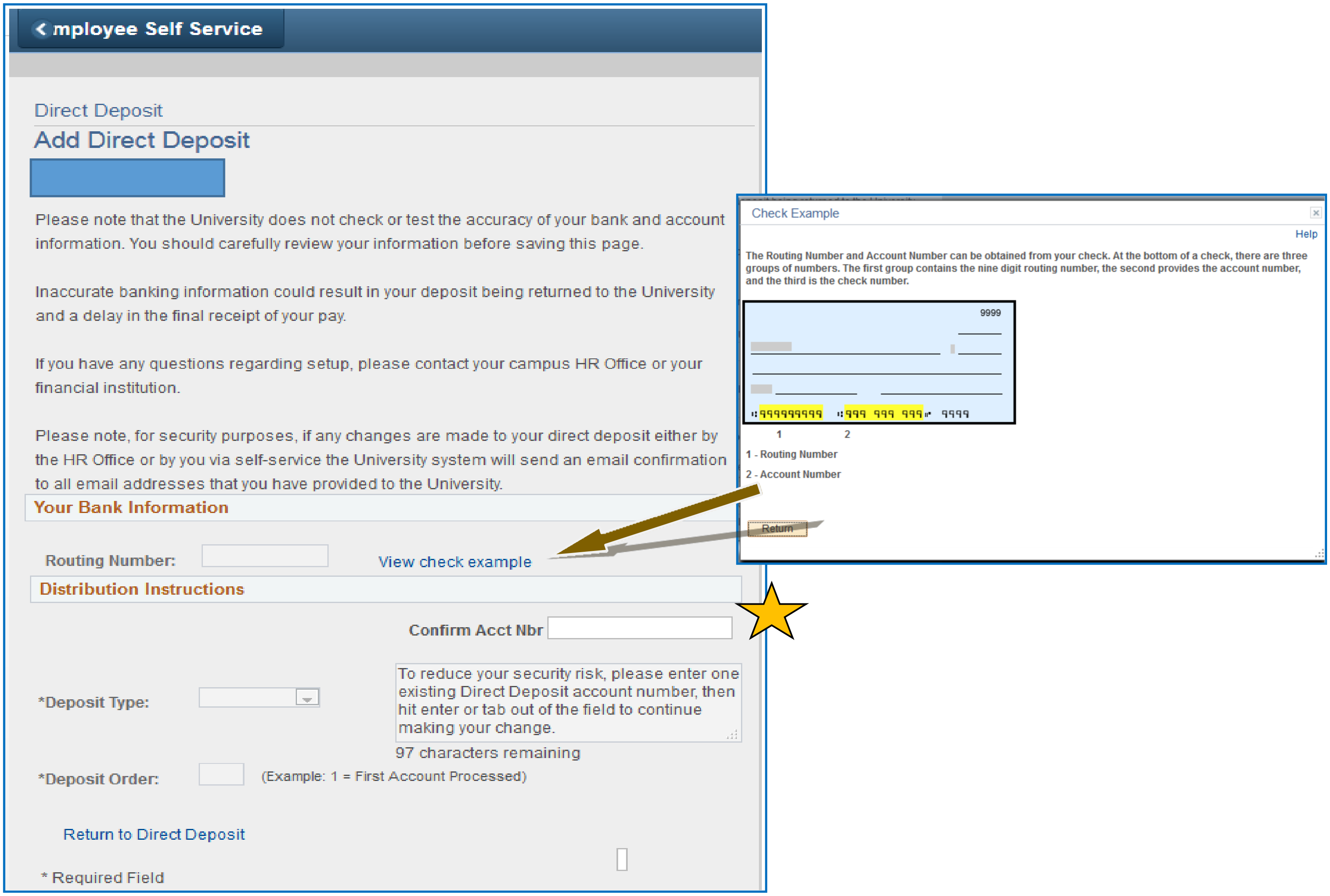
Direct Deposit

Add Direct Deposit

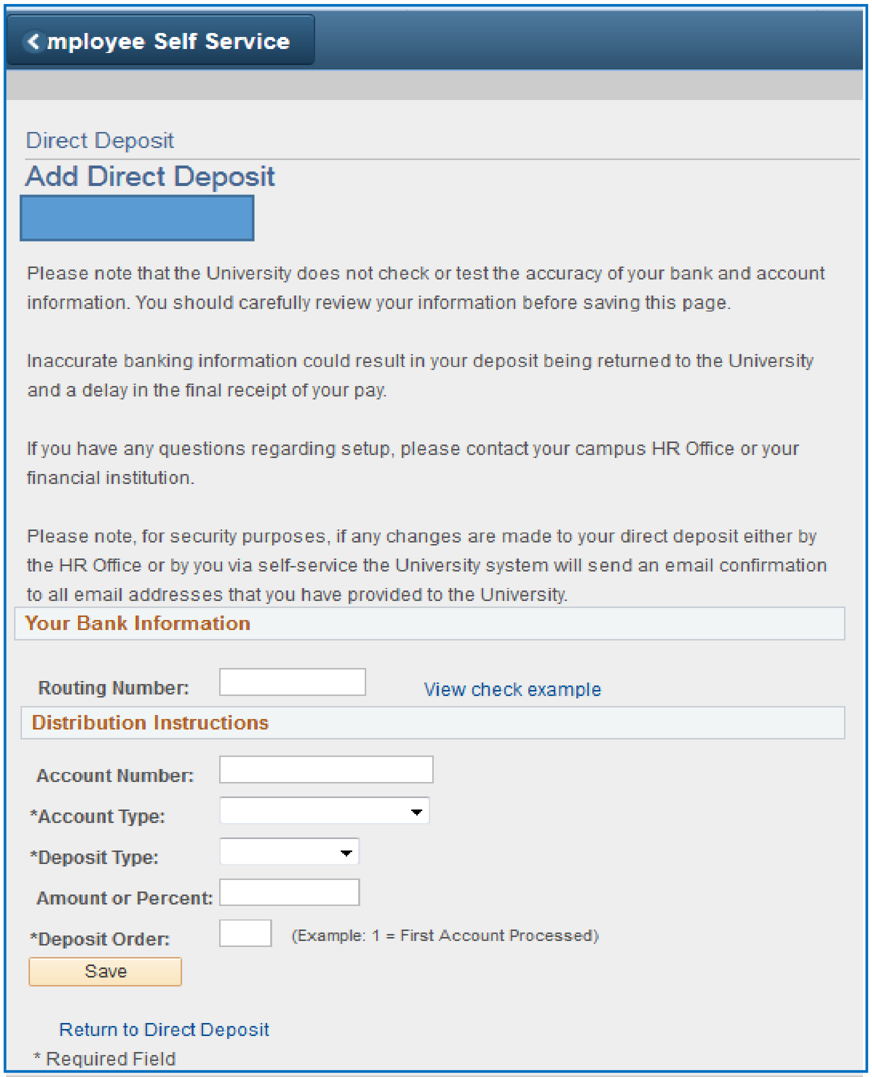


Click on **Add Account**

.

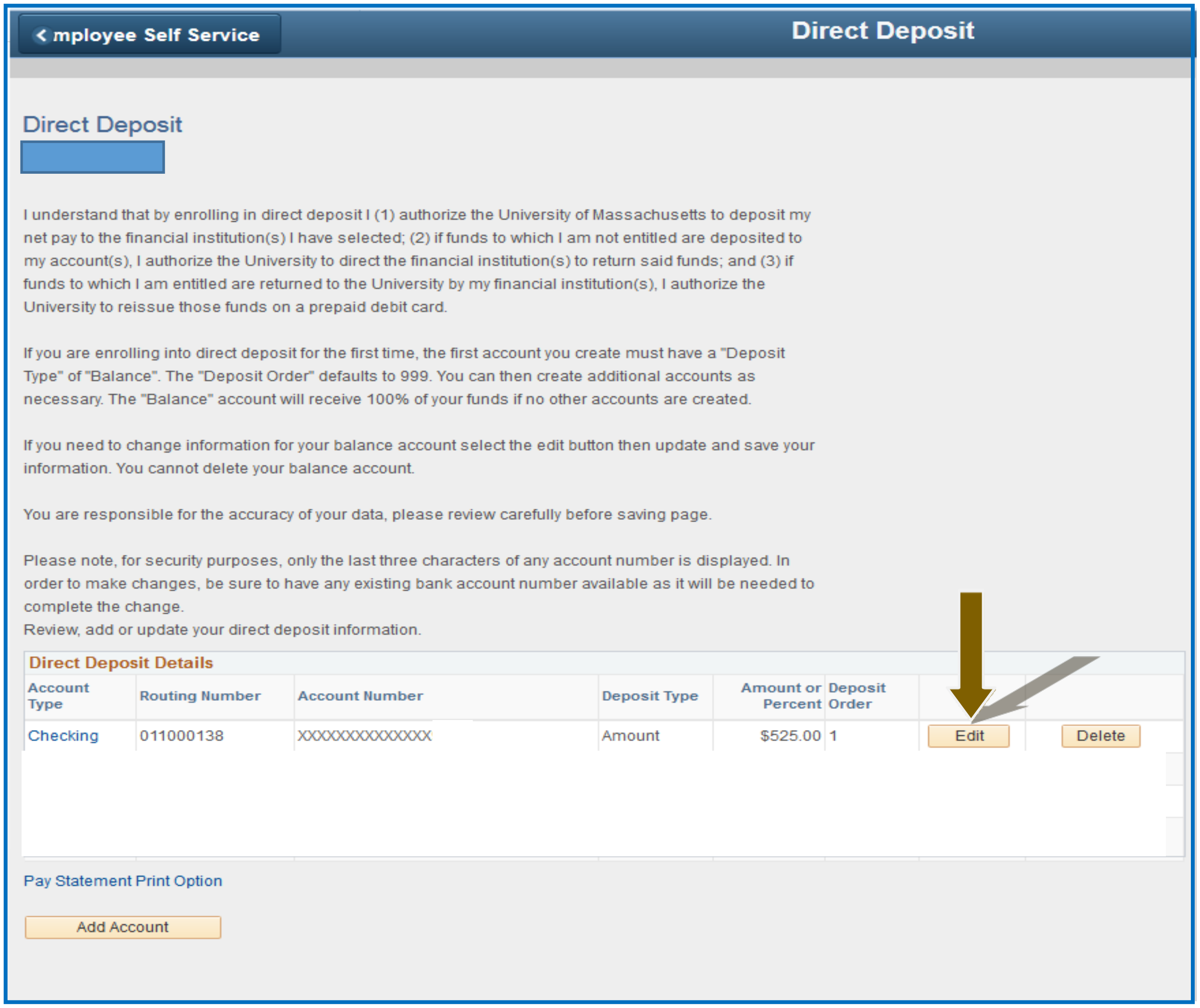


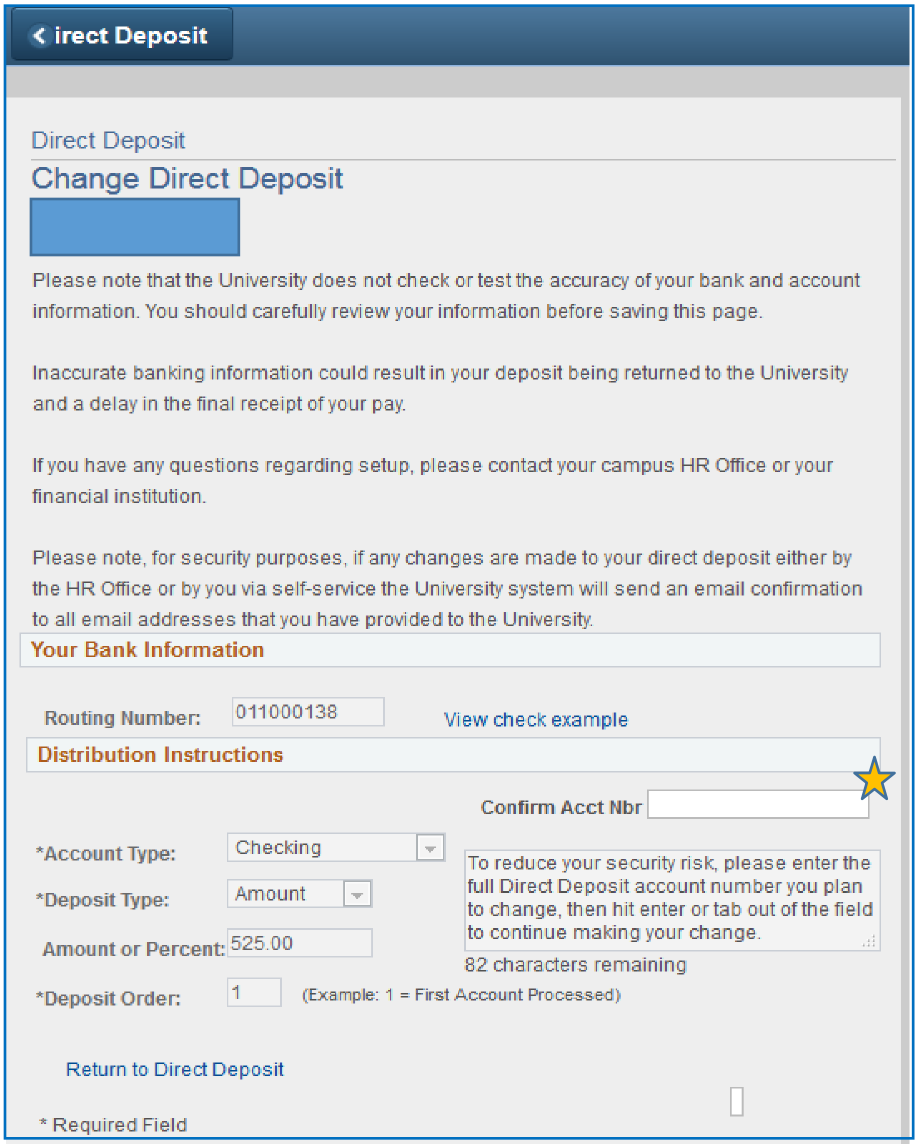
For security purposes you are first asked to Enter/Confirm the account number associated with your direct deposit. Then hit enter or tab out to continue.



2.	Enter Routing number
5.	Enter Account Number
	Enter Account Type: Click the drop down menu either Checking or Savings
6.	Enter Deposit Type: Click the drop down menu either Amount, Percentage or Balance
	Amount or percent is to be left blank if using only one account. If more than one account specify a percent or amount for one and select “Balance” in deposit type for other account.
8.	The Deposit Order field will default to “999” for deposit type of “Balance”, which will display upon saving the page.
9.	Click **Save** then the **OK** button

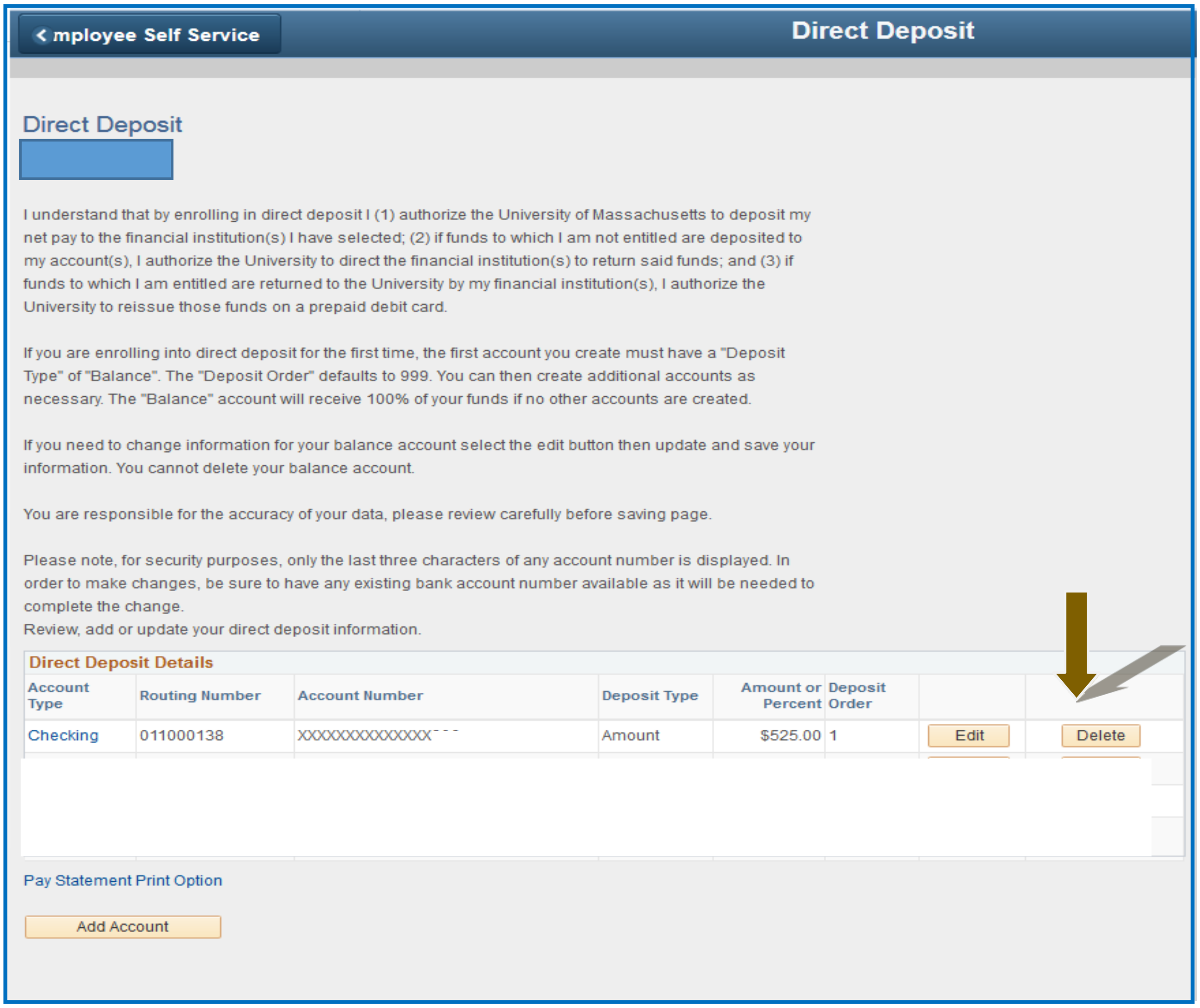
Edit/Change Direct Deposit



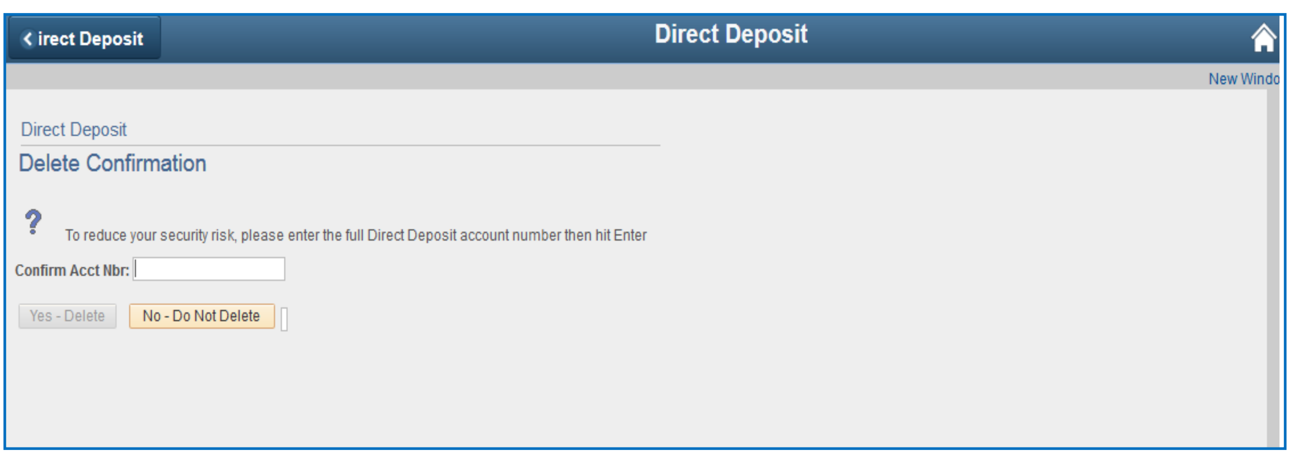


1.	Confirm Account Number, if changing, then tab out **(You must do this FIRST)**
2.	Enter Routing number, if changing
3.	Change/Confirm Deposit Type
4.	Add Amount or Percentage
	Amount or percent is to be left blank if using only one account. If more than one account specify a percent or amount for one and select “Balance” in deposit type for other account.
5.	The Deposit Order field will default to “999” for deposit type of “Balance”, which will display upon saving the page.
6.	Click Save then click the **OK** button.

Delete Direct Deposit

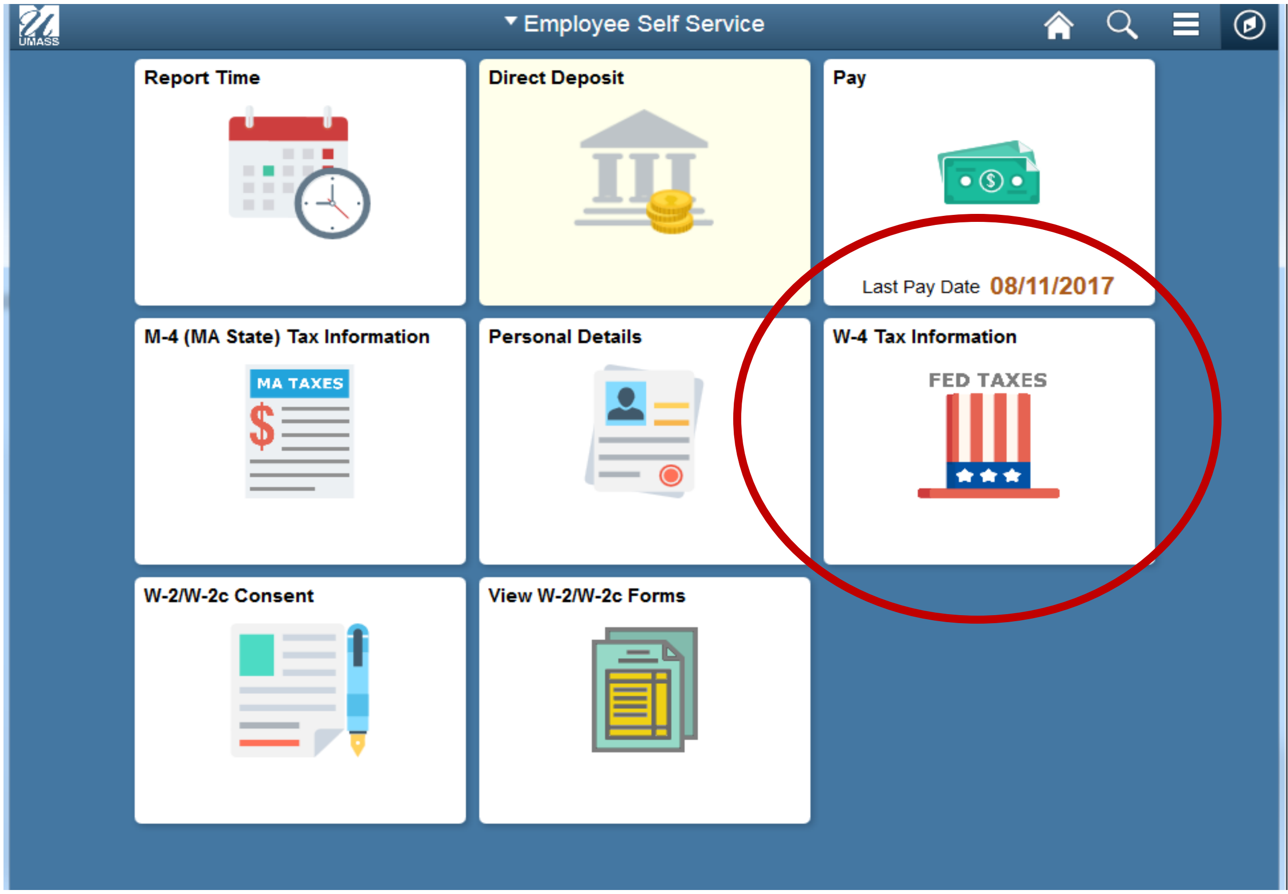


4.	Confirm Account Number
5.	Click "Yes – Delete"



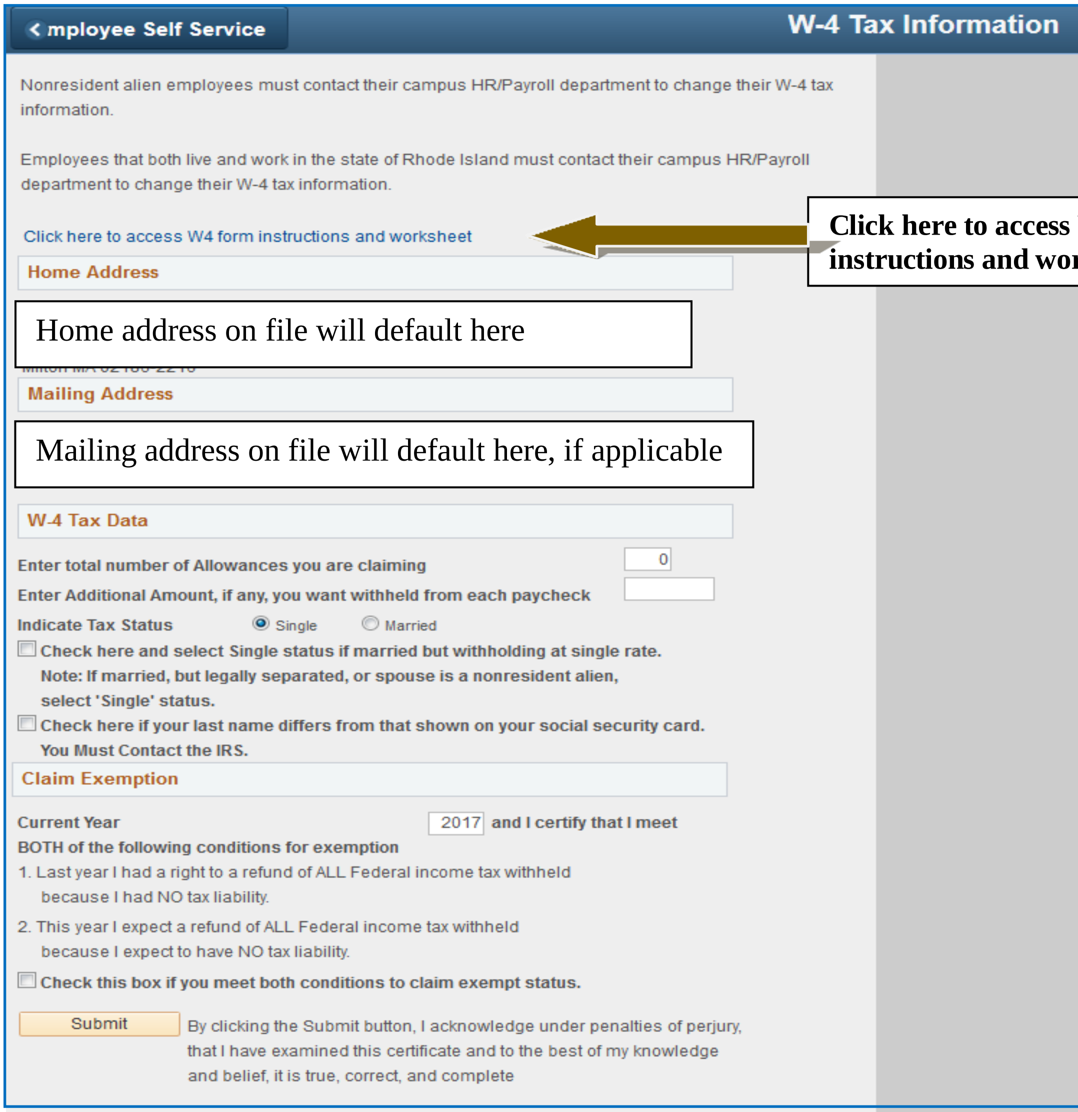
View/Change W-4 (Federal) Tax Information

Click on the following tile below



You must complete Form W-4 so the Payroll Department can calculate the correct amount of tax to withhold from your pay. Federal income tax is withheld from your wages based on marital status and the number of allowances claimed on this form. You may also specify that an additional dollar amount be withheld. You can file a new Form W-4 anytime your tax situation changes and you choose to have more, or less, tax withheld.

Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.



Click here to access W-4 form instructions and worksheet link

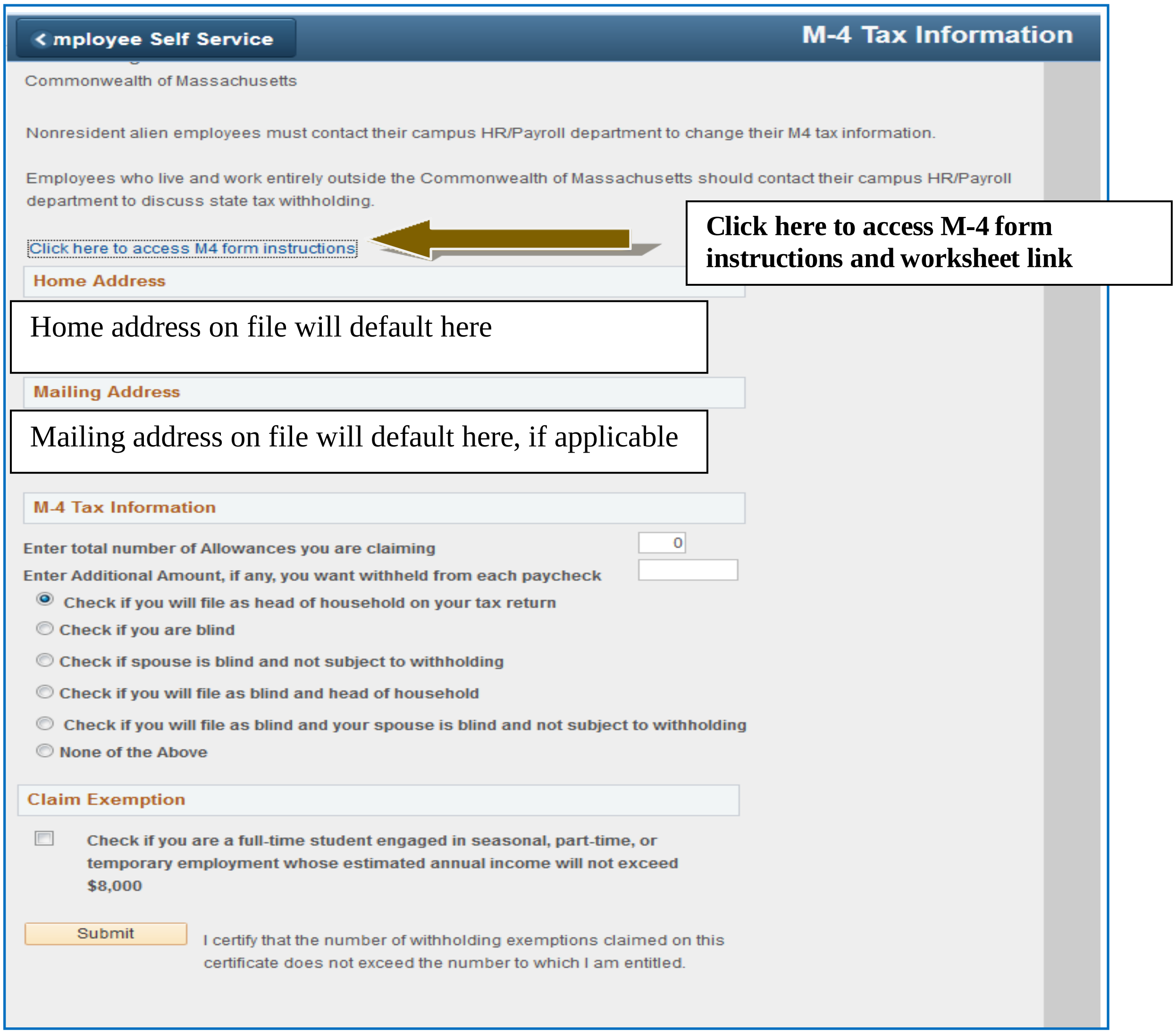
Home address on file will default here

Mailing address on file will default here, if applicable

	Make any updates or changes. Click Submit

Congratulations you have successfully updated/changed your W-4 form.

View/Change M-4 (MA State) Tax Information



	Make any updates or changes. Click **Submit**

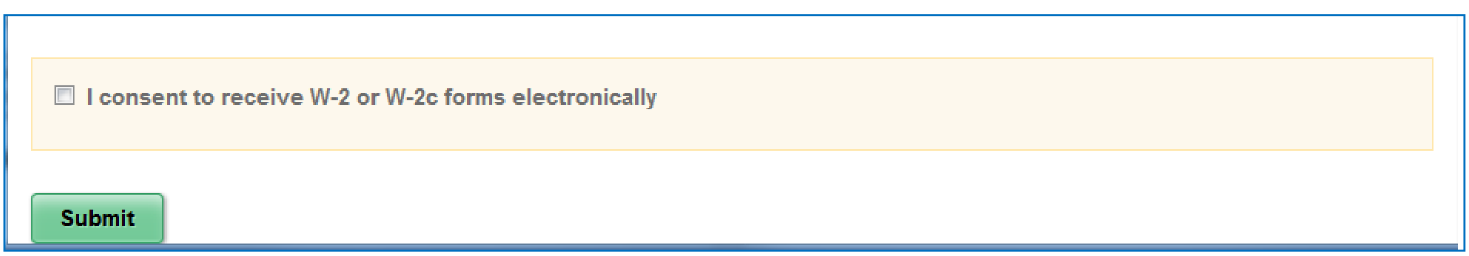
Congratulations you have successfully updated/changed your M-4 form.

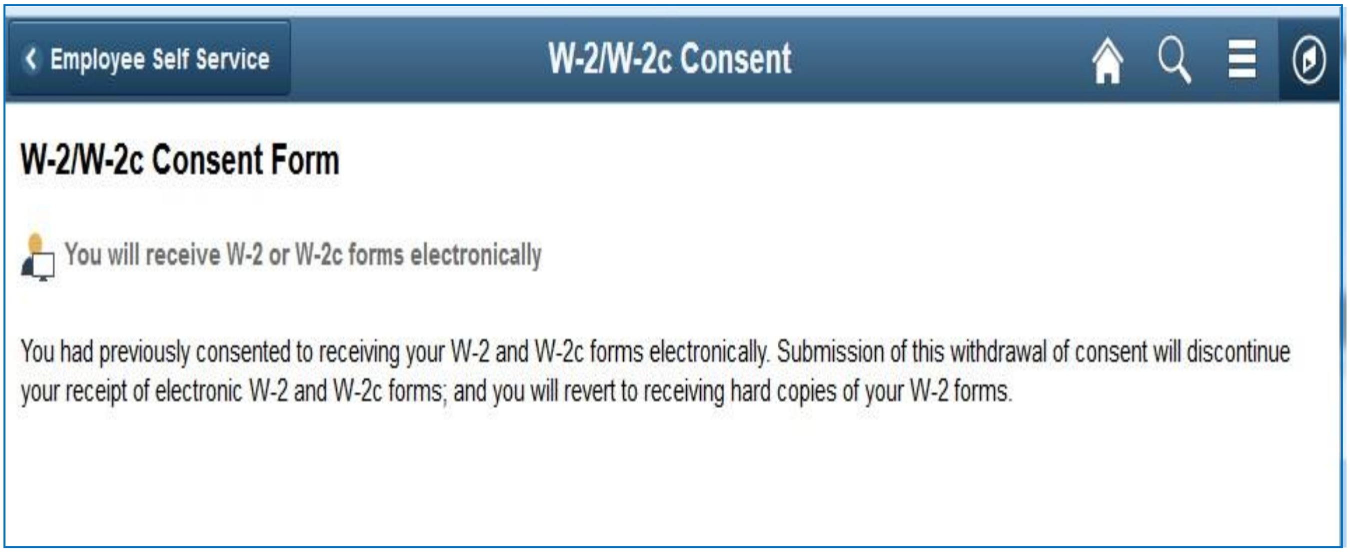
W-2/W-2c Consent Form

If you are new to the system and need to access your online W-2/W-2c statement you must first complete the consent to receive them electronically.

1. To access the form, Click on the **W-2/W-2c Consent** tile. You will be directed to a **Disclosure Statement**.

Once you've read the **Disclosure Statement,** and agree with the terms, click on the box and then click Submit.

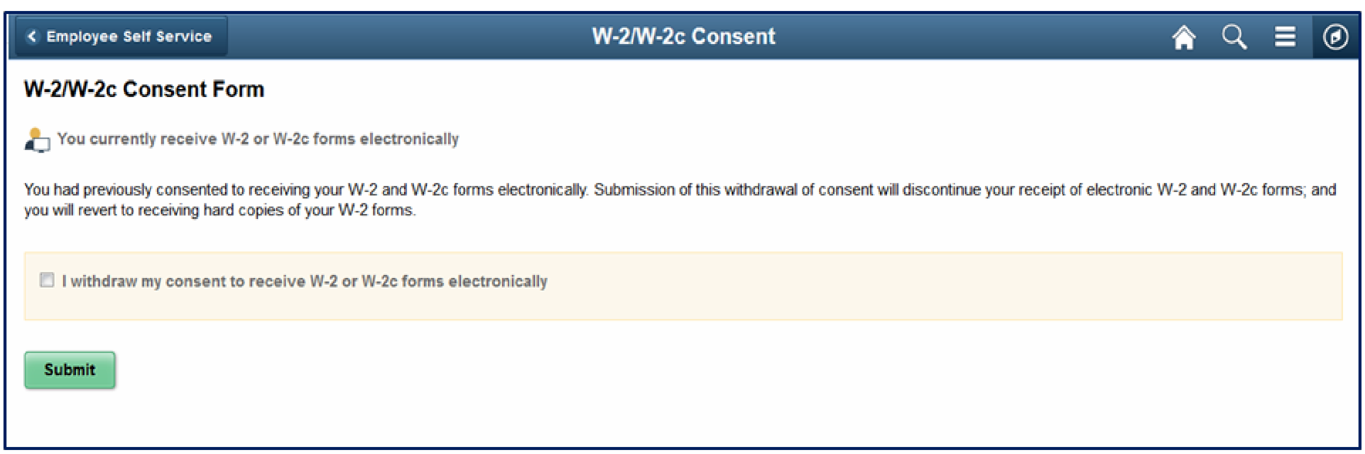




After you submit your consent form, you will receive the following message. The consent will remain valid until you submit a withdrawal of consent form. The exception is when your employment is terminated or electronic access to forms is discontinued.

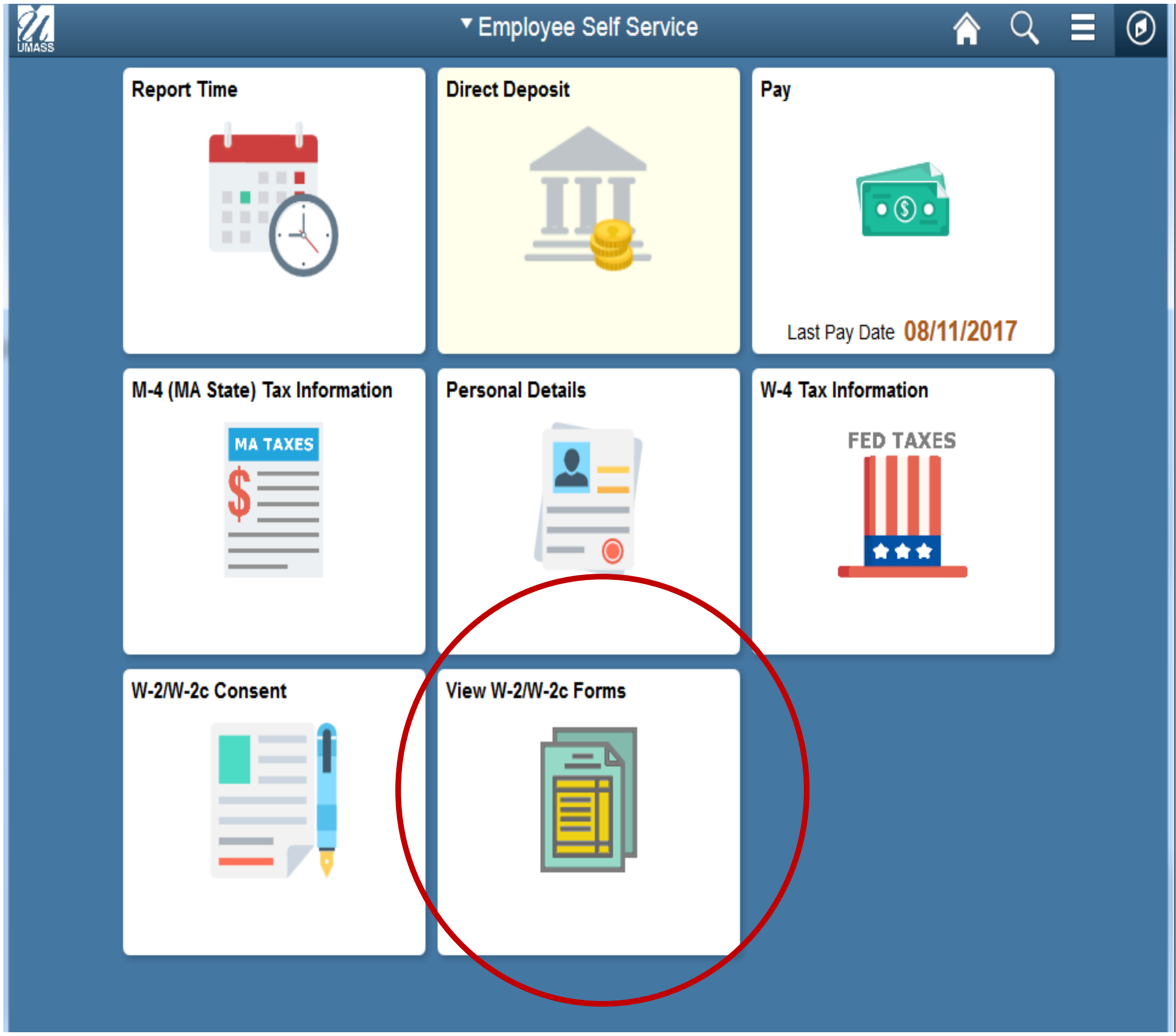
You will not have to use this feature again once you provide consent.

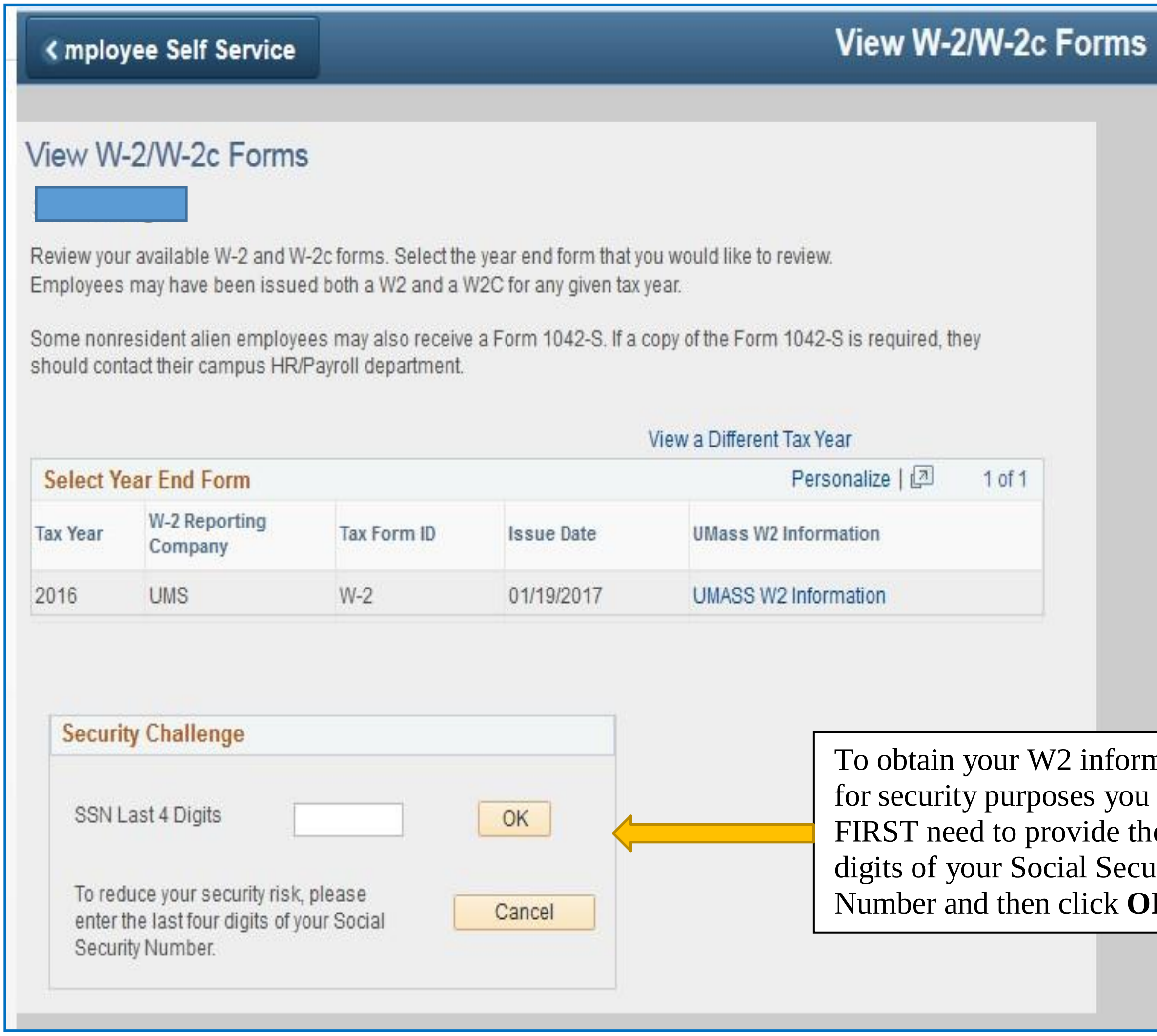
NOTE: If you wish to withdraw consent, repeat the Step 1 process, then click the box withdrawing your consent to electronically receive the W-2/W-2c and click Submit.



If you have any questions please contact HR/Payroll Department.

View W-2/W-2c Forms





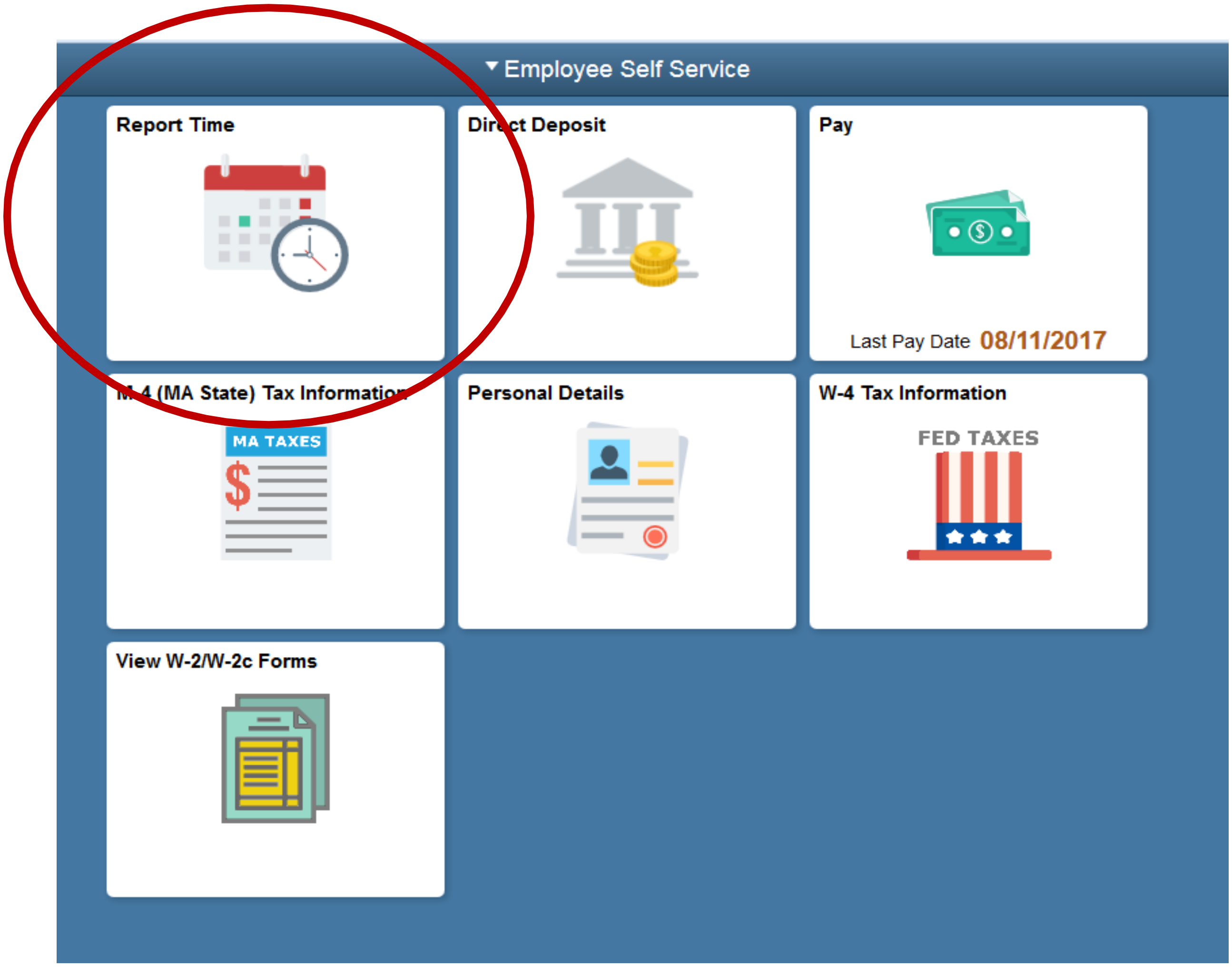
To obtain your W2 information and for security purposes you will FIRST need to provide the last 4 digits of your Social Security Number and then click **OK**

After you enter the last 4 digits of your SSN you will be taken to another screen where you will access your W2/year end form.

3.	To then view your W-2/W-2C click on ***Year End Form*** link
4.	To get additional information on W-2/W-2C Form click on ***UMASS W2 Information*** link
5.	To view a different tax year click on ***View a Different Tax Year*** link
Note:	Once you are in the forms you may print them utilizing the print function

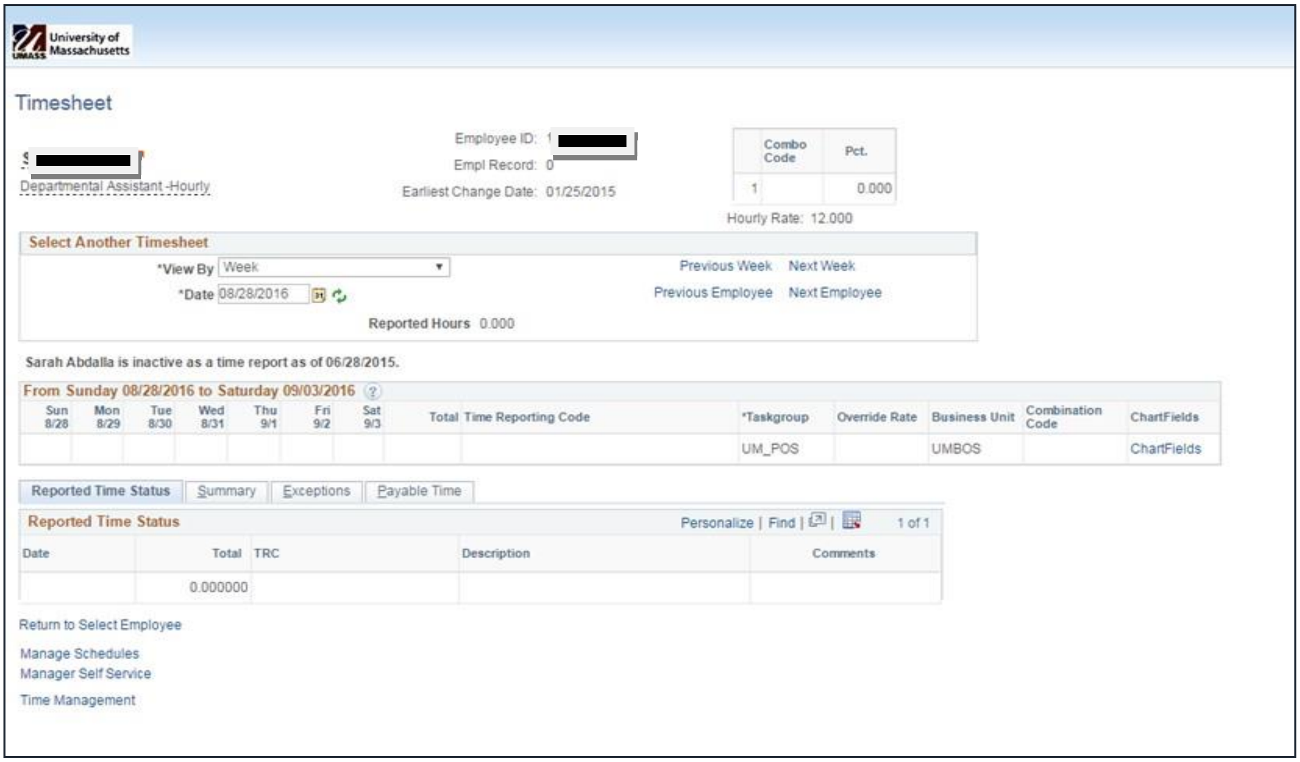
Congratulations you have successfully viewed your W-2/W-2C forms

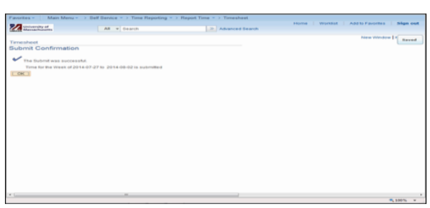
Reporting Time using a Timesheet (HOURLY)



1.	Use the **Report Time tile** to report hours for the current time period.
Date:	This automatically defaults to the beginning of the present week. You can change this date by choosing the Previous Week or Next Week link. Note: You can enter time up to six (6) months in the future however **you cannot change time prior to the current pay period**. If you notice a mistake please contact your department timekeeper.

Report Time Using a Timesheet (Hourly)



Example:	Example entering Time Mary works 8.00 hours a day Monday through Friday.
	Begin by entering 8.00 in each field of the days that were worked
	Click the Time Reporting Code arrow Choose the code REE – Regular
	Click the Submit button. Submit
	The system will provide you with a confirmation that you have successfully entered the information.  **Click Ok**

Congratulations you have successfully entered your hourly time

NOTE:

Leave/Compensatory Time	This tab shows your sick time earned.

For additional information regarding Massachusetts Sick Leave see UMass Boston's - Earned Sick Leave Policy (Mass Sick Time for Non-Benefitted employees)
https://www.umb.edu/hr/policies

HR Pay Calendar 2017

January

S	M	T	W	T	F	S
1	2	3	4	5	6	7◀
▶8	🕛9	10	**11**	12	13	14
15	16	17	18	19	20	21◀
▶22	🕛23	24	**25**	26	$\boxed{27}$	28
29	30	31				

February

S	M	T	W	T	F	S
			1	2	3	4◀
▶5	🕛6	7	**8**	9	$\boxed{10}$	11
12	13	14	15	16	17	18◀
▶19	🕛		**22**	23	$\boxed{24}$	25
26	27	28				

March

S	M	T	W	T	F	S
			1	2	3	4◀
▶5	🕛6	7	**8**	9	$\boxed{10}$	11
12	13	14	15	16	17	18◀
▶19	🕛20	21	**22**	23	$\boxed{24}$	25
26	27	28	29	30	31	

April

S	M	T	W	T	F	S
						1◀
▶2	🕛3	4	**5**	6	$\boxed{7}$	8
9	10	11	12	13	14	15◀
▶16	🕛		**19**	20	$\boxed{21}$	22
23	24	25	26	27	28	29◀
▶30						

May

S	M	T	W	T	F	S
	🕛1	2	**3**	4	$\boxed{5}$	6
7	8	9	10	11	12	13◀
▶14	🕛15	16	**17**	18	$\boxed{19}$	20
21	22	23	24	25	26	27◀
▶28		30	**31**			
	🕛29					

June

S	M	T	W	T	F	S
				1	$\boxed{2}$	3
4	5	6	7	8	9	10◀
▶11	🕛12	13	**14**	15	$\boxed{16}$	17
18	19	20	21	22	23	24◀
▶25	🕛26	27	**28**	29	$\boxed{30}$	

July

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8◀
▶9	🕛10	11	**12**	13	$\boxed{14}$	15
16	17	18	19	20	21	22◀
▶23	🕛24	25	**26**	27	$\boxed{28}$	29
30	31					

August

S	M	T	W	T	F	S
		1	2	3	4	5◀
▶6	🕛7	8	**9**	10	$\boxed{11}$	12
13	14	15	16	17	18	19◀
▶20	🕛21	22	**23**	24	$\boxed{25}$	26
27	28	29	30	31		

September

S	M	T	W	T	F	S
					1	2◀
▶3	🕛		**6**	7	$\boxed{8}$	9
10	11	12	13	14	15	16◀
▶17	🕛18	19	**20**	21	$\boxed{22}$	23
24	25	26	27	28	29	30◀

October

S	M	T	W	T	F	S
▶1	🕛2	3	**4**	5	$\boxed{6}$	7
8	9	10	11	12	13	14◀
▶15	🕛16	17	**18**	19	$\boxed{20}$	21
22	23	24	25	26	27	28◀
▶29	🕛30	31				

November

S	M	T	W	T	F	S
			1	2	$\boxed{3}$	4
5	6	7	8	9	10	11◀
	▶12	🕛13	14	**15**	$\boxed{17}$	18
19	20	21	22	23	24	25◀
▶26	🕛27	28	**29**	30		

December

S	M	T	W	T	F	S
					$\boxed{1}$	2
3	4	5	6	7	8	9◀
▶10	🕛11	12	**13**	14	$\boxed{15}$	16
17	18	19	20	21	22	23◀
▶24	🕛		**27**	28	$\boxed{29}$	30
31						

🕛 By Noon to make correction   **Bold** Payroll Processing Day

u Pay Period Begins   t Pay Period Ends $\boxed{}$ Pay day   Holiday

HR Pay Calendar 2018

January

S	M	T	W	T	F	S
	1	2	3	4	5	6◄
►7	□8	9	**10**	11	12	13
14	15	16	17	18	19	20◄
►21	□22	23	**24**	25	26	27
28	29	30	31			

February

S	M	T	W	T	F	S
				1	2	3◄
►4	□5	6	**7**	8	9	10
11	12	13	14	15	16	17◄
►18	□ 19		**21**	22	23	24
25	26	27	28			

March

S	M	T	W	T	F	S
				1	2	3◄
►4	□5	6	**7**	8	9	10
11	12	13	14	15	16	17◄
►18	□19	20	**21**	22	23	24
25	26	27	28	29	30	31◄

April

S	M	T	W	T	F	S
►1	□2	3	**4**	5	6	7
8	9	10	11	12	13	14◄
►15	□ 16		**18**	19	20	21
22	23	24	25	26	27	28◄
►29	□30					

May

S	M	T	W	T	F	S
		1	**2**	3	4	5
6	7	8	9	10	11	12◄
►13	□14	15	**16**	17	18	19
20	21	22	23	24	25	26◄
►27	□28	29	**30**	31		

June

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9◄
►10	□11	12	**13**	14	15	16
17	18	19	20	21	22	23◄
►24	□25	26	**27**	28	29	30

July

S	M	T	W	T	F	S
1	2	3	4	5	6	7◄
►8	□9	10	**11**	12	13	14
15	16	17	18	19	20	21◄
►22	□23	24	**25**	26	27	28
29	30	31				

August

S	M	T	W	T	F	S
			1	2	3	4◄
►5	□6	7	**8**	9	10	11
12	13	14	15	16	17	18◄
►19	□20	21	**22**	23	24	25
26	27	28	29	30	31	

September

S	M	T	W	T	F	S
						1◄
►2	□ 3	4	**5**	6	7	8
9	10	11	12	13	14	15◄
►16	□17	18	**19**	20	21	22
23	24	25	26	27	28	29◄
►30						

October

S	M	T	W	T	F	S
	□1	2	**3**	4	5	6
7	8	9	10	11	12	13◄
►14	□15	16	**17**	18	19	20
21	22	23	24	25	26	27◄
►28	□29	30	**31**			

November

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10◄
►11	□12	13	**14**	15	16	17
18	19	20	21	22	23	24◄
►25	□26	27	**28**	29	30	

December

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8◄
►9	□10	11	**12**	13	14	15
16	17	18	19	20	21	22◄
►23	□24	25	**26**	27	28	29
30	31					

□ By Noon to make correction   **Bold** Payroll Processing Day

u Pay Period Begins   t Pay Period Ends   Pay day   Holiday