Time and Attendance
Self Service - Exception
Training Guide

University of Massachusetts Boston
Human Resources Department

Revised: September 2017
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HR Direct Self Service

Login to HR Direct

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Go to <a href="http://www.umb.edu/hr">www.umb.edu/hr</a></td>
</tr>
<tr>
<td>2.</td>
<td>Click “Log in to HR Direct”</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Enter your username (first name.lastname)</td>
</tr>
</tbody>
</table>
| 4.   | Enter your password (password is your 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.

<table>
<thead>
<tr>
<th>1. To Edit and address click “QuickAddress”</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Enter the address into the appropriate fields.</td>
</tr>
</tbody>
</table>
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/Edit Emergency Contacts

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.
### Payroll Advice

**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.

**Date:** 09/22/2017

**Pay Group:** UHS-UHSBoston

**Business Unit:** UH-BOS

**Advice #:** 8843845

---

#### Taxes

<table>
<thead>
<tr>
<th>Description</th>
<th>Current</th>
<th>YTD</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll Deductions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td>270.23</td>
<td>5,397.63</td>
<td></td>
</tr>
<tr>
<td><strong>Gross:</strong></td>
<td>44,253.02</td>
<td>36,270.21</td>
<td><strong>3,287.60</strong></td>
</tr>
<tr>
<td><strong>Total Deductions:</strong></td>
<td>22.30</td>
<td>410.40</td>
<td><strong>3,287.60</strong></td>
</tr>
<tr>
<td><strong>Net Pay:</strong></td>
<td>270.23</td>
<td>5,397.63</td>
<td><strong>3,287.60</strong></td>
</tr>
</tbody>
</table>

**Available HOURS**

- **Vacation:** 125.08
- **Personal:** 15.00
- **Sick:** 114.23

**Net Pay Distribution**

- **Advice #:** 8843845

<table>
<thead>
<tr>
<th>Account Type</th>
<th>Account Number</th>
<th>Deposit Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checking</td>
<td>63433001</td>
<td>$1,584.84</td>
</tr>
</tbody>
</table>

**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

I understand that by enrolling in direct deposit I (1) authorize the University of Massachusetts to deposit my net pay to the financial institution(s) I have selected; (2) if funds to which I am not entitled are deposited to my accounts, I authorize the University to direct the financial institution(s) to return said funds; and (3) if funds to which I am entitled are returned to the University by my financial institution(s), I authorize the University to reissue those funds on a prepaid debit card.

If you are enrolling into direct deposit for the first time, the first account you create must have a “Deposit Type” of “Balance”. The “Deposit Order” defaults to 999. You can then create additional accounts as necessary. The “Balance” account will receive 100% of your funds if no other accounts are created.

If you need to change information for your balance account select the edit button then update and save your information. You cannot delete your balance account.

You are responsible for the accuracy of your data, please review carefully before saving page.

Please note, for security purposes, only the last three characters of any account number is displayed. In order to make changes, be sure to have any existing bank account number available as it will be needed to complete the changes.

Review, add or update your direct deposit information.

<table>
<thead>
<tr>
<th>Direct Deposit Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Account Type</strong></td>
</tr>
<tr>
<td>Checking</td>
</tr>
</tbody>
</table>

Pay Statement Print Option

Add Account
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.

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
<table>
<thead>
<tr>
<th>January</th>
<th>February</th>
<th>March</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="calendar_january.png" alt="Calendar" /></td>
<td><img src="calendar_february.png" alt="Calendar" /></td>
<td><img src="calendar_march.png" alt="Calendar" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>April</th>
<th>May</th>
<th>June</th>
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<tbody>
<tr>
<td><img src="calendar_april.png" alt="Calendar" /></td>
<td><img src="calendar_may.png" alt="Calendar" /></td>
<td><img src="calendar_june.png" alt="Calendar" /></td>
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<tr>
<th>July</th>
<th>August</th>
<th>September</th>
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<tr>
<td><img src="calendar_july.png" alt="Calendar" /></td>
<td><img src="calendar_august.png" alt="Calendar" /></td>
<td><img src="calendar_september.png" alt="Calendar" /></td>
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<table>
<thead>
<tr>
<th>October</th>
<th>November</th>
<th>December</th>
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<tbody>
<tr>
<td><img src="calendar_october.png" alt="Calendar" /></td>
<td><img src="calendar_november.png" alt="Calendar" /></td>
<td><img src="calendar_december.png" alt="Calendar" /></td>
</tr>
</tbody>
</table>

- **Bold** Payroll Processing Day
- **u** Pay Period Begins
- **t** Pay Period Ends
- **|** Pay day
- **|** Holiday
<table>
<thead>
<tr>
<th>Month</th>
<th>Calendar</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td><img src="image" alt="January Calendar" /></td>
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<tr>
<td>February</td>
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<tr>
<td>November</td>
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</tr>
<tr>
<td>December</td>
<td><img src="image" alt="December Calendar" /></td>
</tr>
</tbody>
</table>

**Legend:**
- **☑ By Noon to make correction**
- **Bold** Payroll Processing Day
- **Pay Period Begins**
- **Pay Period Ends**
- **Pay day**
- **Holiday**