Time and Attendance
Self Service - Exception
Training Guide

University of Massachusetts Boston
Human Resources Department
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HR Direct Self Service

Login to HR Direct

Through the development of existing faculty and staff, and the continued integration of new and talented contributors, UMass Boston is powered by a motivated, talented, and diverse workforce. Emphasizing a culture of continuous learning and professional development, UMass Boston staff and faculty are afforded the opportunity for individual and interdisciplinary growth, in an environment that promotes innovative thought and professional expression.

At UMass Boston, you are part of something special!

Please click here to log onto HRDirect
Please use the following information when logging in:

<table>
<thead>
<tr>
<th>Campus user ID:</th>
<th>Your UMass Boston account name (i.e., John.Doe)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password:</td>
<td>Your UMass Boston email password</td>
</tr>
</tbody>
</table>

<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 on the HR Direct Logo</td>
</tr>
</tbody>
</table>

Secure Access Login

Campus User ID: firstname.lastname
Password:
Campus:

Choose Campus ...
Amherst
Boston
Dartmouth
Lowell
President’s Office
Service
Worcester

Forgot Password? | Need Help?
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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</thead>
<tbody>
<tr>
<td>3</td>
<td>Enter your username (first name lastname)</td>
</tr>
<tr>
<td>4</td>
<td>Enter your password (password is your email password)</td>
</tr>
<tr>
<td></td>
<td>Note: if your email password is changed your HR Direct login password will change.</td>
</tr>
<tr>
<td>5</td>
<td>Click on the arrow and choose the campus (Boston)</td>
</tr>
<tr>
<td>6</td>
<td>Click login</td>
</tr>
</tbody>
</table>

**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*
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 and change your emergency contact.

Personal Information Summary

<table>
<thead>
<tr>
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</tr>
</thead>
</table>
| 1.   | Begin by navigating to the **Personal Information Summary** page  
    Click the **Self Service** link |
| 2.   | Click the **Personal Information** link |
| 3.   | Personal Summary  
    Click the **Personal Information Summary** link  
    Review your current data  
    Verify the **Employee Name** information **Note:** The employee name is view only. If the name is incorrect, contact the Human Resources Department. |

*Congratulations you have successfully reviewed your personal information*
Add/Edit Home Mailing Address

1. Click Menu (top left hand corner), Click Self Service, Click Personal Information  Click Home and Mailing Address

2. Your Address will appear. If you would like to add an address click Add if you would like to change your address click Edit.
3. To Edit and address click QuickAddress
4. Enter the address into the appropriate fields.
5. Click Search
6. Click the correct address link: "QUICK ADDRESS"
7. Information will auto populate click Save

*Congratulations you have successfully Added/Edited your Home and Mailing Address*
Add/Edit Phone Number

Phone Numbers

1. Click Menu (top left hand corner), Click Self Service, Click Personal Information  Click Phone Numbers

2. Your Phone number will appear. If you would like to add a phone number click Add Phone number and enter new information. If you would like to change your current phone number click delete and add a new number

Congratulations you have successfully Added/Edited your Telephone Number
Add/Edit Email Addresses

1. **Click Menu (top left hand corner), Click Self Service, Click Personal Information  Click Email Addresses**

![Image of menu options]

2. **You email address will appear. If you would like to add an email address click: Add email address and enter new information.**

**NOTE:** The email address that appears is your UMB email address which should not be deleted.

**Email Addresses**

![Email Addresses screen]

**Congratulations you have successfully Added/Edited Email Address**
Add/Edit Emergency Contacts

1. Click Menu (top left hand corner), Click Self Service, Click Personal Information  Click Emergency Contacts

2. Your Emergency Contact Information will appear. If you would like to add an Emergency Contact click Add Emergency Contact and enter new information. if you would like to change your current contact click delete and add a new contact.

Emergency Contacts

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Relationship to Employee</th>
<th>Primary Contact</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
</table>

Add Emergency Contact

Save

Congratulations you have successfully added an Emergency Contact
Payroll and Compensation

View your Pay Advice (Paycheck)

1. Click on "Select Paycheck"

2. Click the 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.*
3. View, print or save your pay advice.

4. Once you have finished please click the \( \times \) in the corner to exit out of your pay advice.

*Congratulations you have successfully viewed your pay advice.*
Add/Change Direct Deposit

1. Click Menu (top left hand corner), Click Self Service, Click Payroll and Compensation, Click Direct Deposit

2. If you would like to change your bank information you can click either edit or delete. If you would like to add a new account click Add Account

3. For security purposes, enter one account number currently associated with your direct deposit into the **Confirm Acct Nbr** field.

   *Note:* If you need assistance locating your **Account Number**, use a personal check associated with the bank account and click the **View check example** link next to the **Routing Number** field to find the **Account Number**.

   Press **Enter** or tab out of the field to finish confirming the account number.
4. **Enter Routing number and account number**

5. **Click on the arrow and choose Account Type**

6. **Click on the arrow and choose Deposit Type. For one account must choose “Balance”**.

7. **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 click the OK button**.

---

**Congratulations you have successfully added/changed Direct Deposit information**
View/Change W-4 (Federal) Tax Information

1. Click Menu (top left hand corner), Click Self Service, Click Payroll and Compensation, Click View W02/W02c Forms

Employees that both live and work in the state of Rhode Island must contact their campus HR/Payroll department to change their W-4 tax information.

Click here to access W4 form instructions and worksheet

Home Address
31 Rickford Rd
Braintree MA 02184-3603

W-4 Tax Data
Enter total number of Allowances you are claiming
Enter Additional Amount, if any, you want withheld from each paycheck

Indicate Marital Status

[ ] Check here and select Single status if married but withholding at single rate. Note: If married, but legally separated, or spouse is a nonresident alien, select ‘Single’ status.

[ ] Check here if your last name differs from that shown on your social security card. You Must Contact the IRS.

Claim Exemption

Current Year [2014] and I certify that I meet

Both of the following conditions for exemption
1. Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability.
2. This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.

[ ] Check this box if you meet both conditions to claim exempt status.

Submit By clicking the Submit button, I acknowledge under penalties of perjury, that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete
<p>| | |</p>
<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>2.</td>
<td>Change any necessary information.</td>
</tr>
<tr>
<td>3.</td>
<td>To get additional information click on following link above home address</td>
</tr>
<tr>
<td>4.</td>
<td>Click Submit</td>
</tr>
</tbody>
</table>

**NOTE:**

<p>| | |</p>
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</thead>
<tbody>
<tr>
<td>7.</td>
<td>Right click the <a href="#">Click here to access W-4 form instructions and worksheet link</a></td>
</tr>
<tr>
<td>8.</td>
<td>Make any updates or changes. Click <a href="#">Submit</a></td>
</tr>
</tbody>
</table>

*Congratulations you have successfully updated/changed your W-4 form.*
View/Change M-4 (MA State) Tax Information

1. Click Menu (top left hand corner), Click Self Service, Click Payroll and Compensation, Click View M-4 (MA State) Tax Information.
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Change any necessary information.</td>
</tr>
</tbody>
</table>
| 3. | To get additional information click on following link above home address  
“Click here to access M4 form instructions” |
| 4. | Click Submit |

*Congratulations you have successfully updated/changed your M-4 form.*
View W-2/W-2C Forms

1. Click Menu (top left hand corner), Click Self Service, Click Payroll and Compensation, Click View W02/W02c Forms

2. For Security purposes you will need to provide the last 4 digits of your Social Security Number and click OK.
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 (EXCEPTION)

![Image of the UI](image.png)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Click the <strong>Main Menu</strong> button.</td>
</tr>
<tr>
<td>8.</td>
<td>Click the <strong>Self Service</strong> menu.</td>
</tr>
<tr>
<td>9.</td>
<td>Click the <strong>Time Reporting</strong> menu.</td>
</tr>
<tr>
<td>10.</td>
<td>Click the <strong>Report Time</strong> menu.</td>
</tr>
<tr>
<td>11.</td>
<td>Click the <strong>Timesheet</strong> menu.</td>
</tr>
<tr>
<td>12.</td>
<td>Use the <strong>Timesheet</strong> page to report exception hours and time reporting codes for the current time period.</td>
</tr>
<tr>
<td>13.</td>
<td>You can also change the Values by using the View By field you can choose to view by Day, Week, or Time Period.</td>
</tr>
</tbody>
</table>

**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 3 months in the future however you can Not change time prior to the current pay period. If you notice a mistake please contact your department timekeeper.

**Note:** For each day that the employee reports an exception, the total number of hours must be equal to or greater than (comp time or overtime) the scheduled hours for that day.
**Reported Time Status**

This tab provides you with your reported time status. Each time you submit your information your Reported Time Status will be updated.

**Note:** All additional leave and/or earned hours (i.e, Compensatory time, Overtime) must be submitted to your Supervisor and/or Timekeeper.

**Summary**

This tab shows your scheduled hours for the day/week.
Leave/Compensatory Time

Before you enter your time, you can check your balances in the Leave/Compensatory Time for Sick, Personal, Vacation and Comp Time. Balances are current to the date you view the tab. If you enter time and click submit your balance will be immediately reflected in this tab (except comp time).

Exceptions

This tab will allow you to see if you have made any errors in your reporting your exception time. The day after you enter your time please check this tab.

NOTE: If you need to correct time, you can do this right away and have the capability to do this anytime between 1:00 pm – 5:00 pm. (Notify your supervisor and/or timekeeper of the change)
Example of Entering Exemption time

On Tuesday, John worked for 3.50 hours and took 4.00 hours of sick time.

He begins by entering the **Regular** hours for that day.

He enters "3.5" into the **Tue** field.

He clicks the **Time reporting Code** list.

He clicks the **REG - Regular Pay SERS Eligible** list item.

John will now enter his sick time into the **Tue** field.

John enters "4.0".

He clicks the **Time Reporting Code** list.

He clicks the **SIC - Sick Time** list item.

When reporting time for partial REG and exception time, the system requires that the total hours for the day match the scheduled hours. In this example, John’s daily hours should equal 7.50 hours.

Once completed John clicks the **Submit** button.
John has successfully entered his exception time into the timesheet.
<table>
<thead>
<tr>
<th>January</th>
<th>February</th>
<th>March</th>
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<tbody>
<tr>
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<td>1 2</td>
<td>3 4 5 6 7 8 9</td>
<td>1 2 3 4 5 6 7 8</td>
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<tr>
<td>10 11 12 13 14 15 16 17</td>
<td>7 8 9 10 11 12</td>
<td>6 7 8 9 10 11 12 13</td>
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<tr>
<td>21 22 23 24</td>
<td>25 26 27 28</td>
<td>13 14 15 16 17 18 19 20</td>
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<td>29 30 31</td>
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<td>20 21 22 23 24 25 26</td>
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**April**

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<td>5 6 7 8 9 10 11 12 13</td>
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<td>17 18 19 20 21 22 23 24</td>
<td>15 16 17 18 19 20 21 22 23</td>
<td>12 13 14 15 16 17 18 19 20</td>
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<tr>
<td>24 25 26 27 28 29 30 31</td>
<td>29 30 31</td>
<td>26 27 28 29 30</td>
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**May**

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**June**

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**July**

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<td>4 5 6 7 8 9 10</td>
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**August**

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**September**

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**October**

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**November**

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<td>11 12 13</td>
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**December**

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HR Pay Calendar 2017

January

February

March

April

May

June

July

August

September

October

November

December

By Noon to make correction

Bold Payroll Processing Day

Pay Period Begins

Pay Period Ends

Pay day

Holiday