2016 - 2017

Time and Attendance Self Service HOURLY - Training Guide

University of Massachusetts Boston
Human Resources Department

Revised: September 2016

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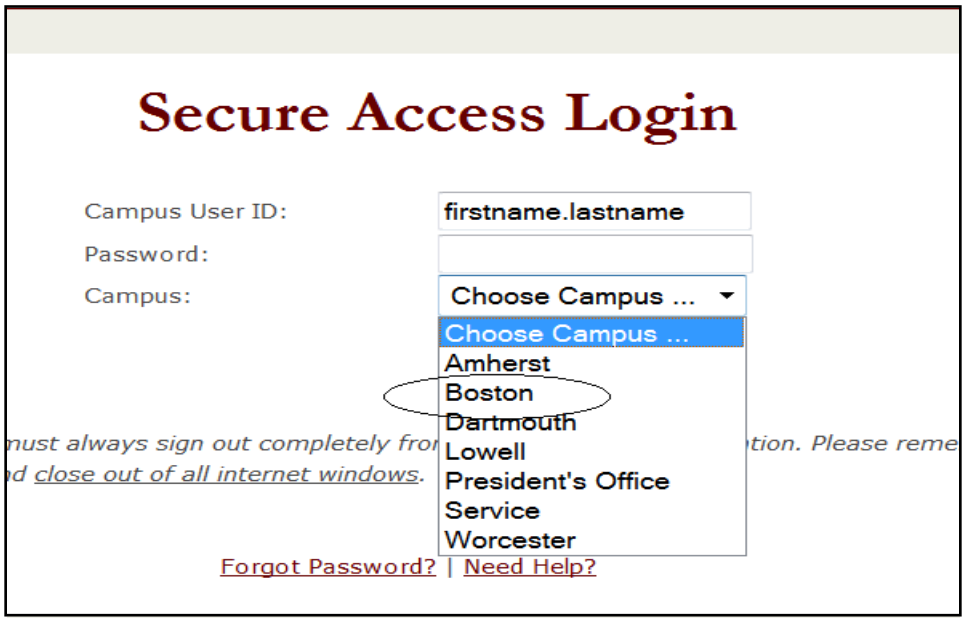
HR Direct Self Service

Login to HR Direct

Step	Action
1.	Go to www.umb.edu/hr
2.	Click on the HR Direct Logo



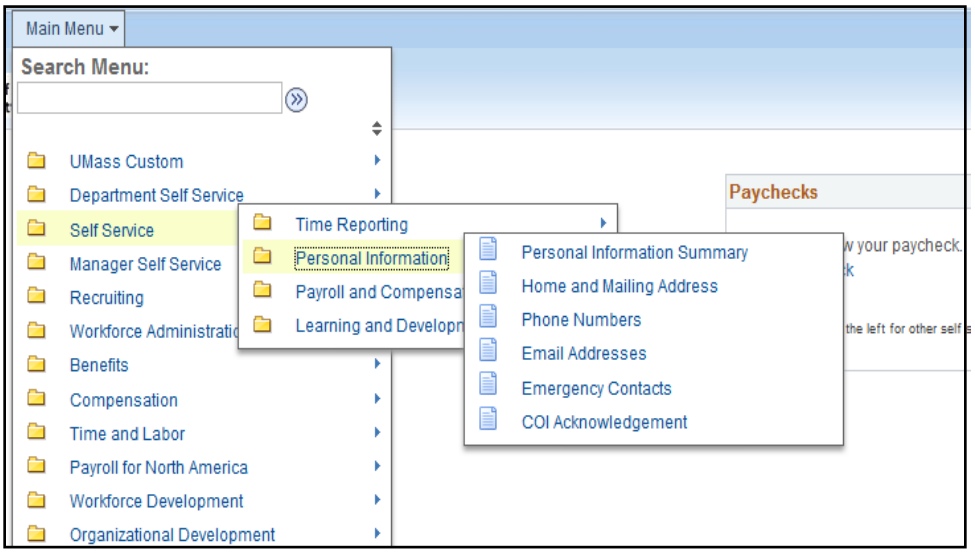
Step	Action
3.	Enter your username (first name.lastname)
4.	Enter your password (password is you email password) Note: if your email password is changed your HR Direct login password will change.
5.	Click on the arrow and choose the campus (Boston)
6.	Click login
Note:	Please Note if you are using a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

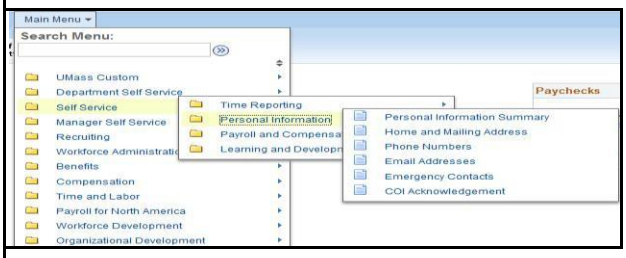
Congratulations you have successfully logged into HR Direct

Personal Information

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

Personal Information Summary

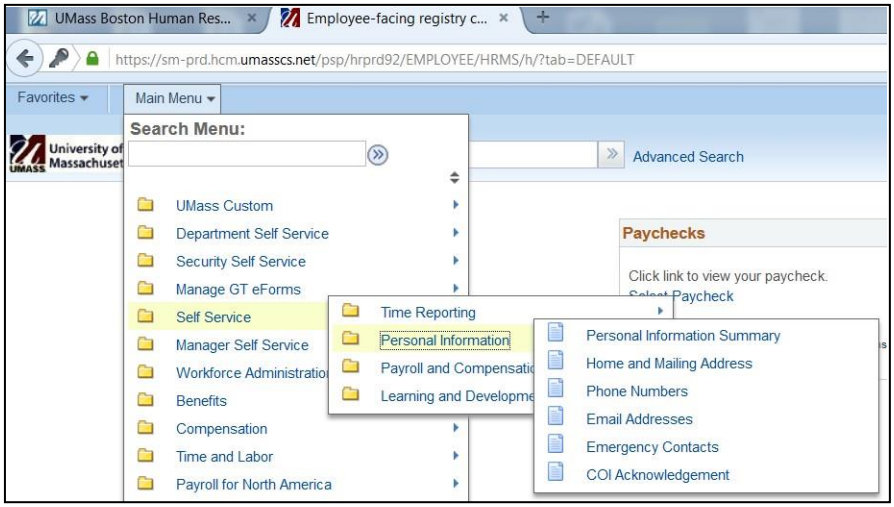


Step	Action
1.	Begin by navigating to the **Personal Information Summary** page Click the **Self Service** link
2.	Click the **Personal Information** link 
3.	Personal Summary Click the **Personal Information Summary** link Review your current data Verify the **Employee Name** information ***Note:***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

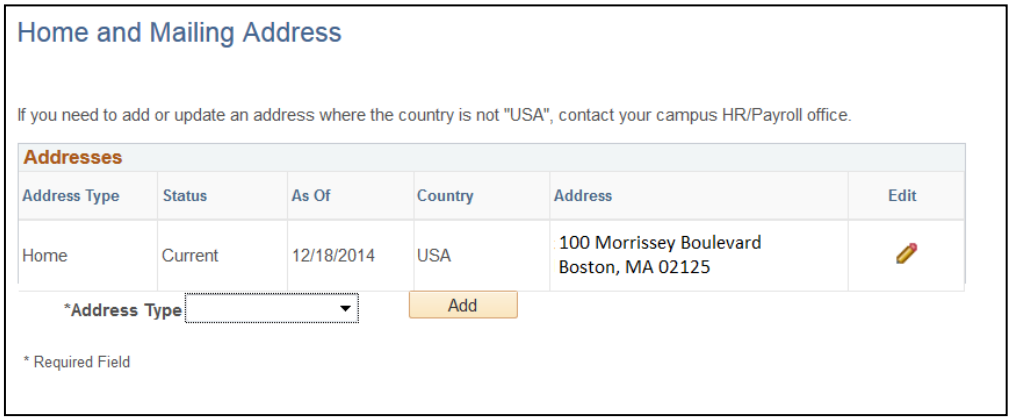
Congratulations you have successfully reviewed your personal information

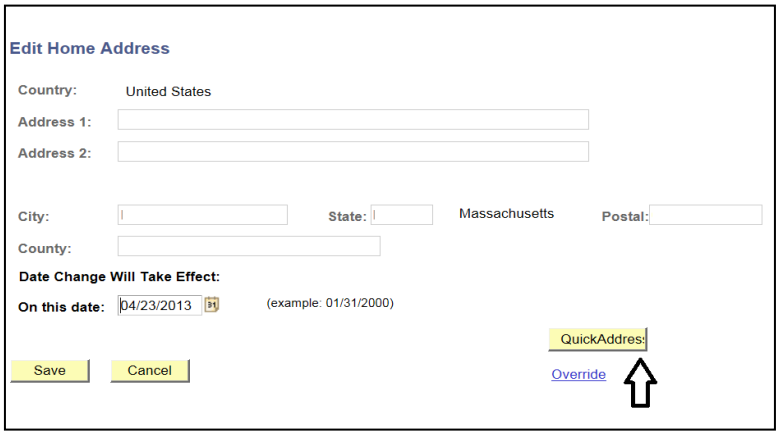
Add/Edit Home Mailing Address

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.





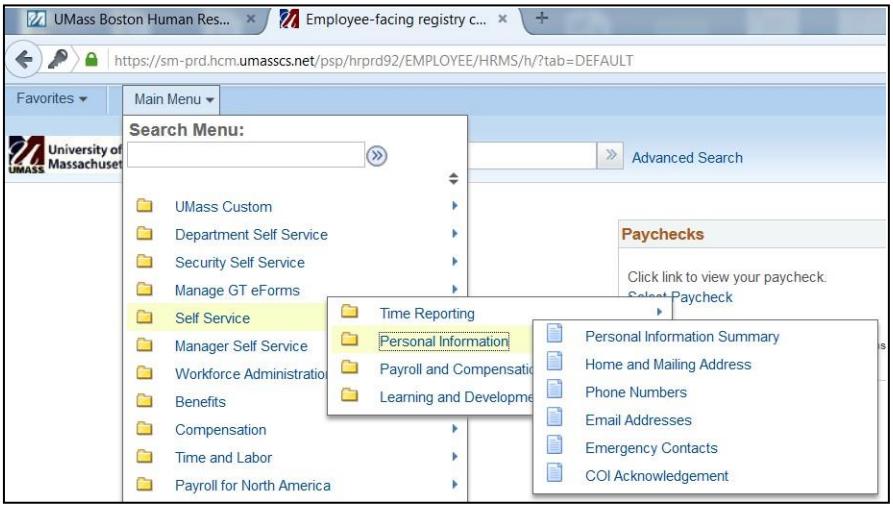
3.	To Edit and address click QuickAddress
4.	Enter the address into the appropriate fields.
5.	Click Search
6.	Click the correct address link: "QUICK ADDRESS "
7.	Information will auto populate click Save

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

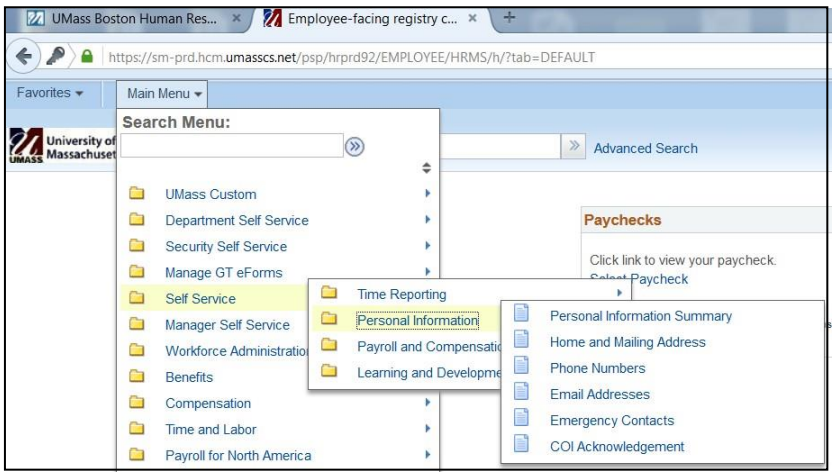


2.	Your Phone number will appear. If you would like to add a phone number click Add Phone number and enter new information. if you would like to change your current phone number click delete and add a new number

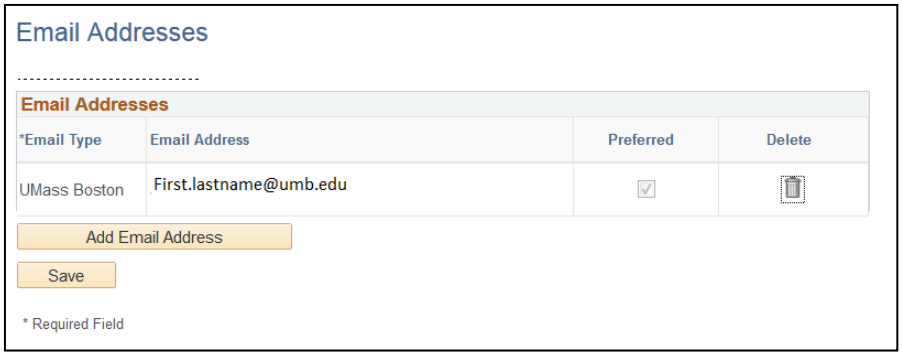
Congratulations you have successfully Added/Edited your Telephone Number

Add/Edit Email Addresses

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



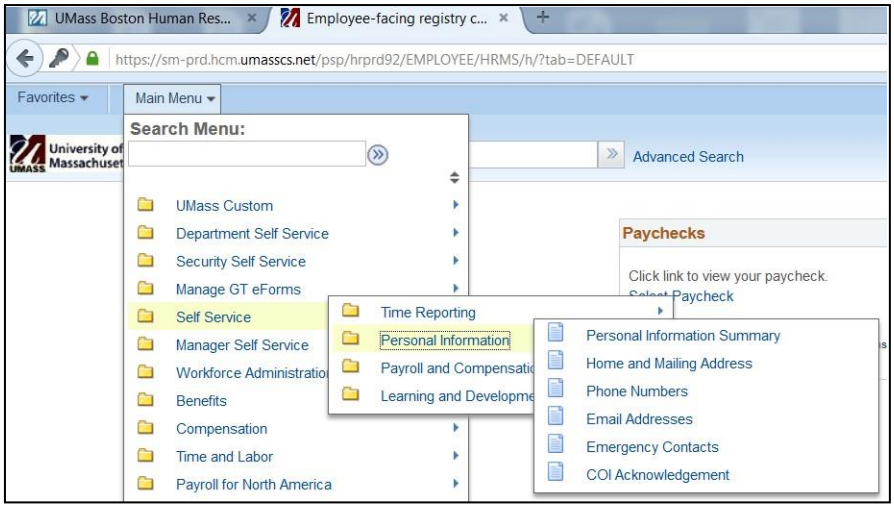
2.	You email address will appear. If you would like to add an email address click: Add email address and enter new information.
NOTE:	**The email address that appears is your UMB email address which should not be deleted.**



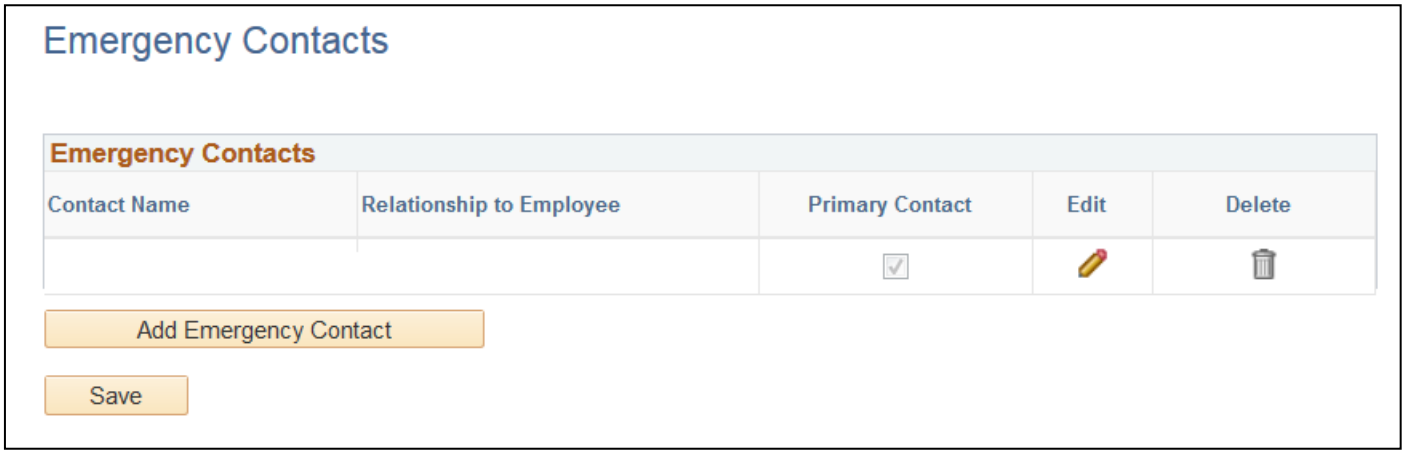
Congratulations you have successfully Added/Edited Email Address

Add/Edit Emergency Contacts

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



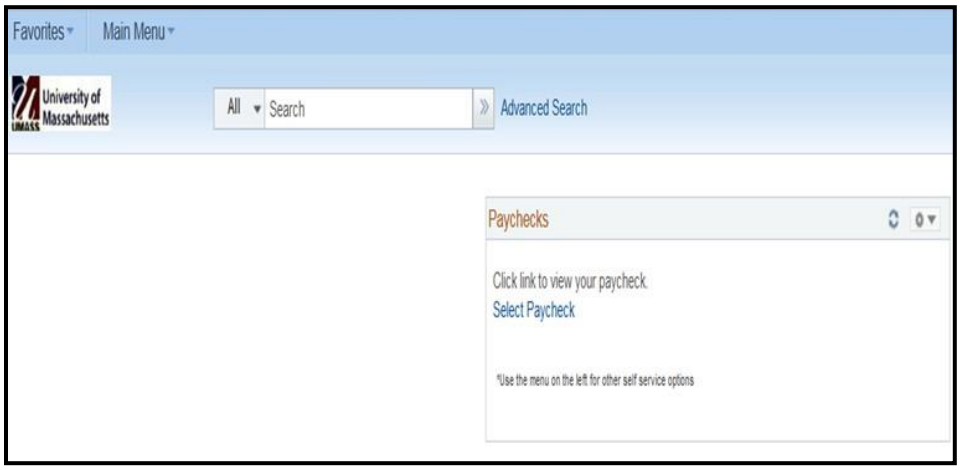
2.	Your Emergency Contact Information will appear. If you would like to add an Emergency Contact click Add Emergency Contact and enter new information. if you would like to change your current contact click delete and add a new contact.



Congratulations you have successfully added an Emergency Contact

Payroll and Compensation

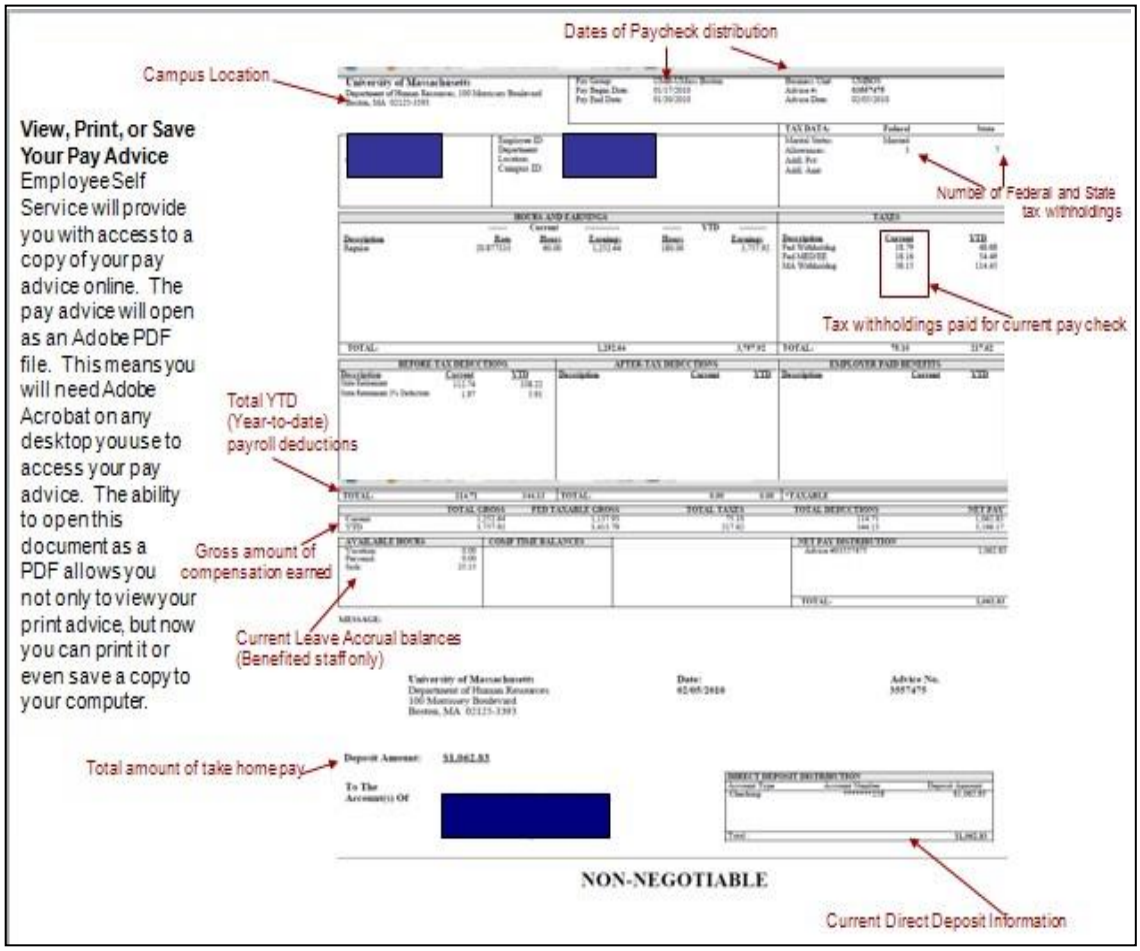
View your Pay Advice (Paycheck)



1.	Click on **"Select Paycheck"**

Check Date	Company	Pay Begin Date	Pay End Date	Net Pay	Paycheck Number	PDF File
08/01/2014	Commonwealth of Massachusetts	07/13/2014	07/26/2014		6533151	✓
07/18/2014	Commonwealth of Massachusetts	06/29/2014	07/12/2014		6513820	✓

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.*

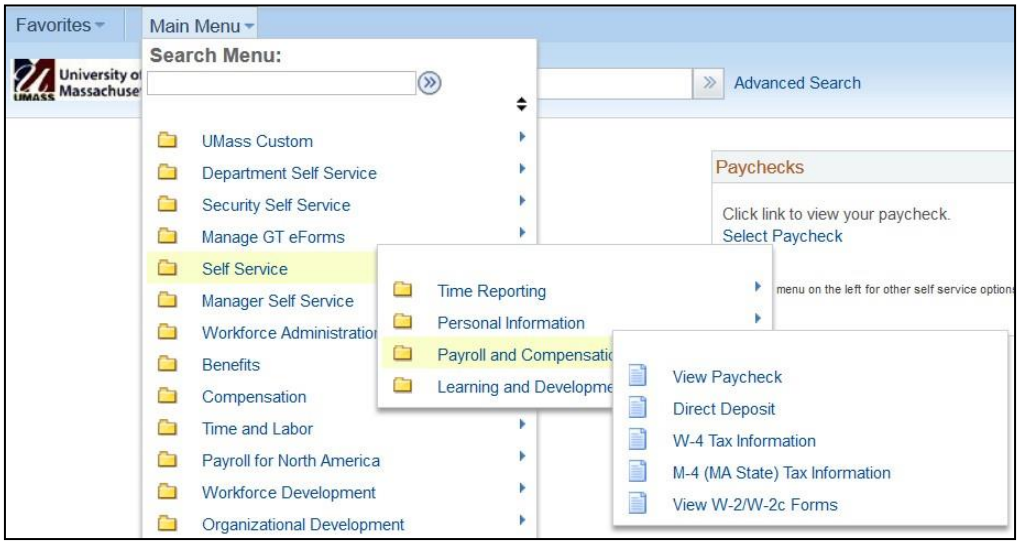


3.	View, print or save your pay advice.
4.	Once you have finished please click the  in the corner to exit out of your payadvice.

Congratulations you have successfully viewed your pay advice.

Add/Change Direct Deposit

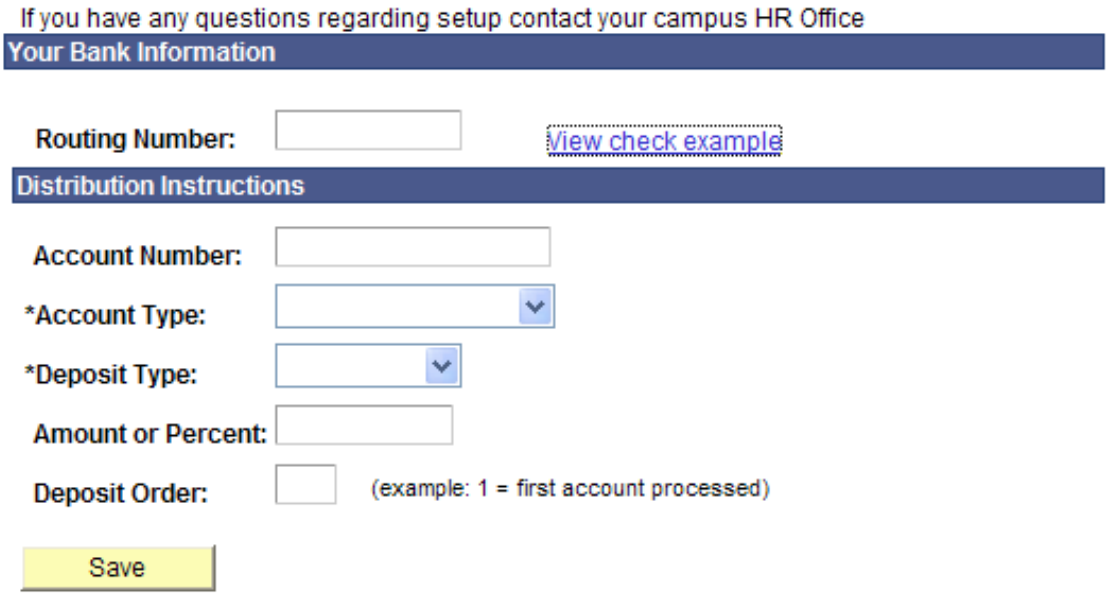
1.	Click Menu (top left hand corner), Click Self Service, Click Payroll and Compensation, Click Direct Deposit



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.

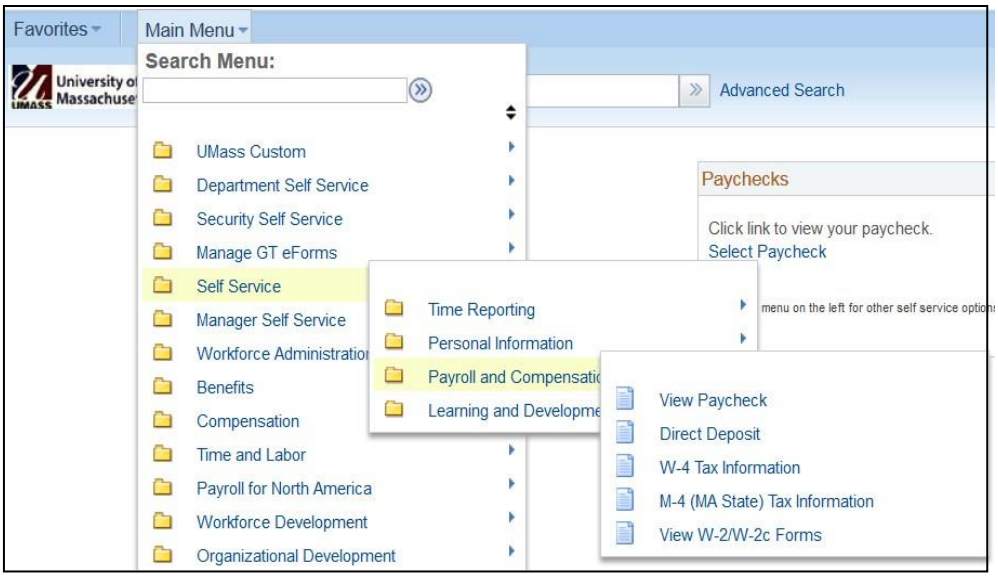
4.	Enter Routing number and account number
5.	Click on the arrow and choose Account Type
6.	Click on the arrow and choose Deposit Type. For one account must choose "Balance".
7.	Amount or percent is to be left blank if using only one account. If more than one account specify a percent or amount for one 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.

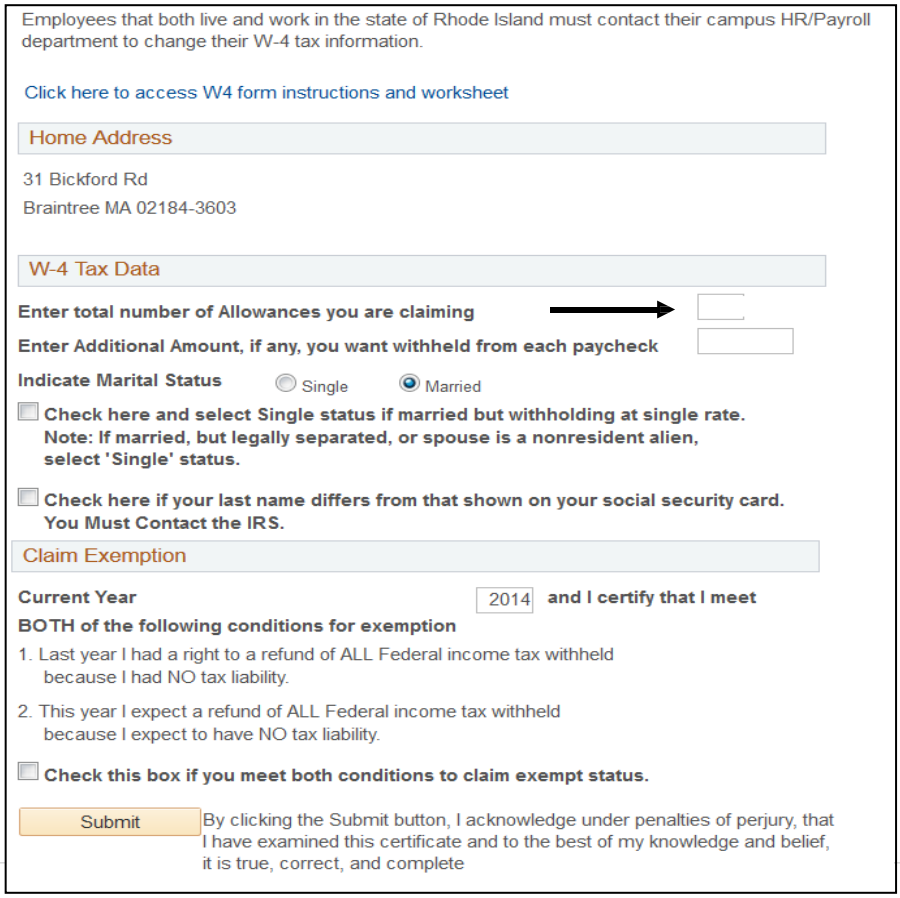


Congratulations you have successfully added/changed Direct Deposit information

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





2.	Change any necessary information.
3.	To get additional information click on following link above home address
4.	Click Submit

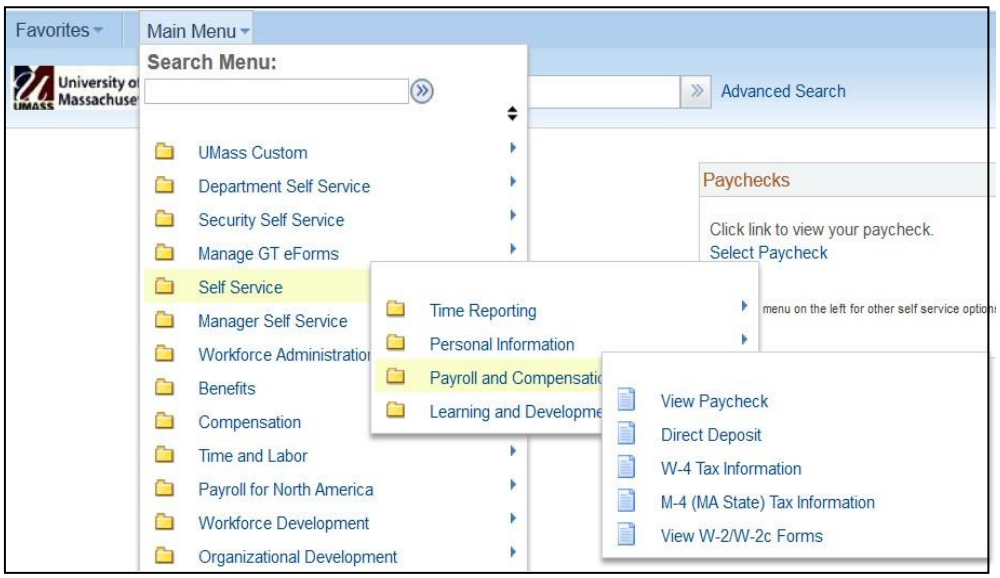
NOTE:

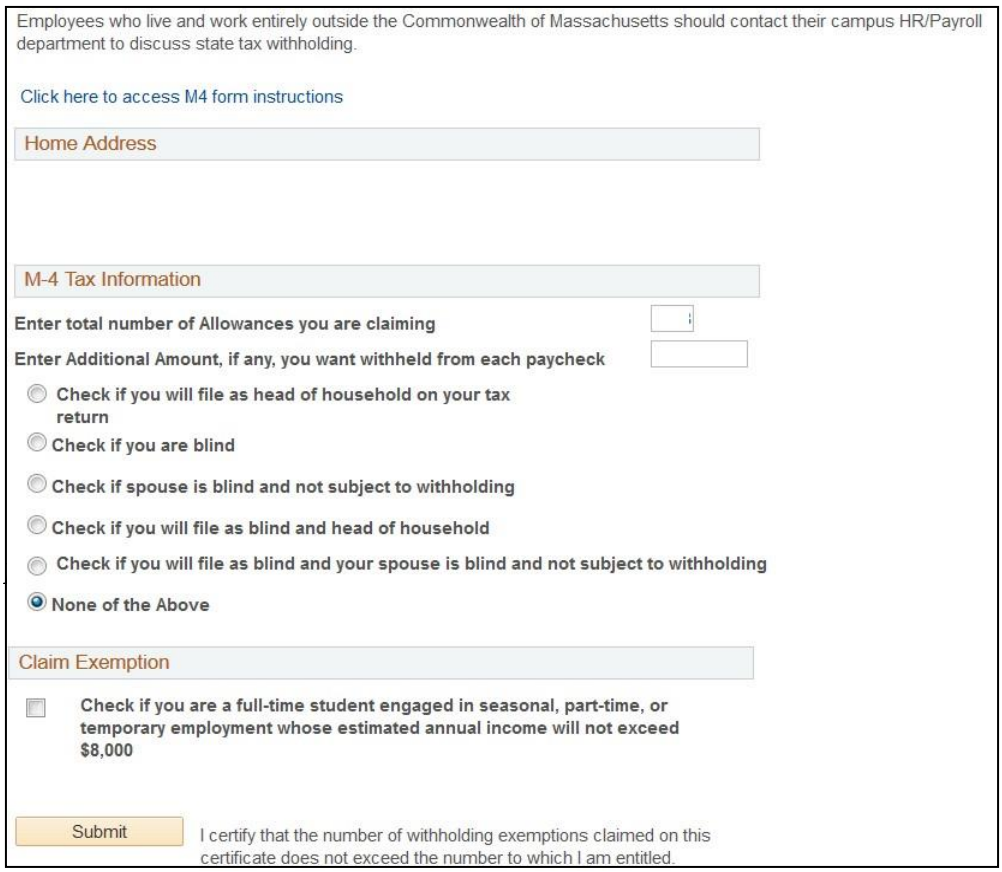
7.	Right click the **Click here to access W-4 form instructions and worksheet link**
8.	Make any updates or changes. Click **Submit**

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

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

1.	Click Menu (top left hand corner), Click Self Service, Click Payroll and Compensation, Click View M-4 (MA State) Tax Information.



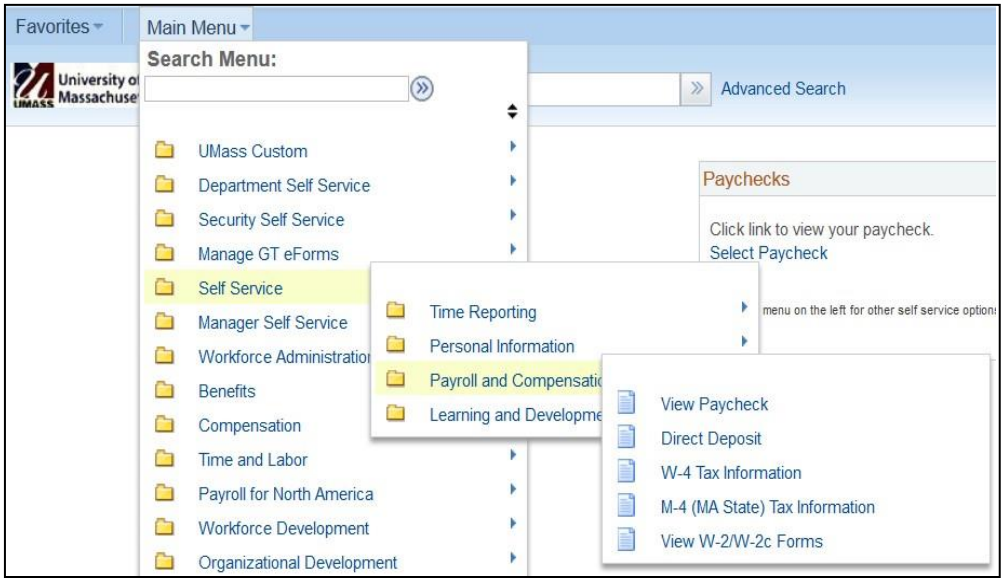


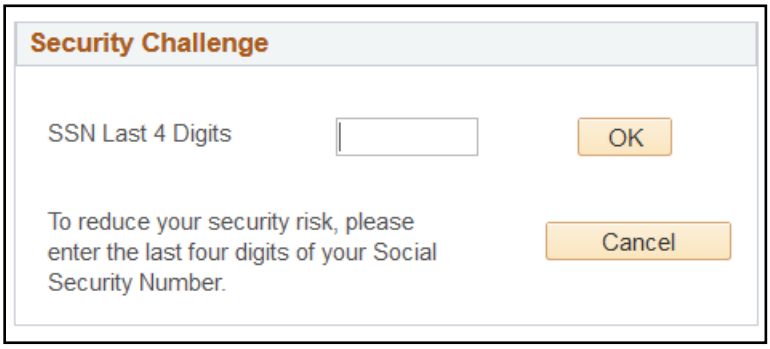
2.	Change any necessary information.
3.	To get additional information click on following link above home address "Click here to access M4 form instructions"
4.	Click Submit

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

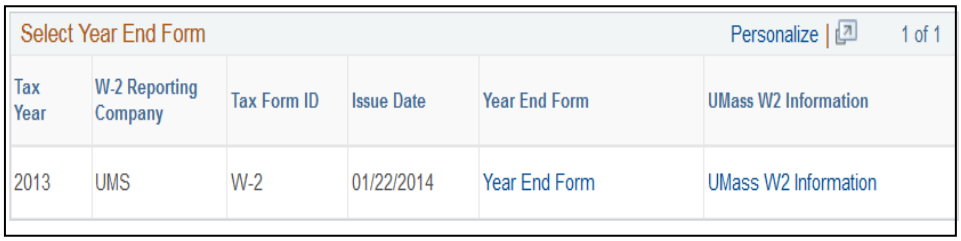
View W-2/W-2C Forms

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



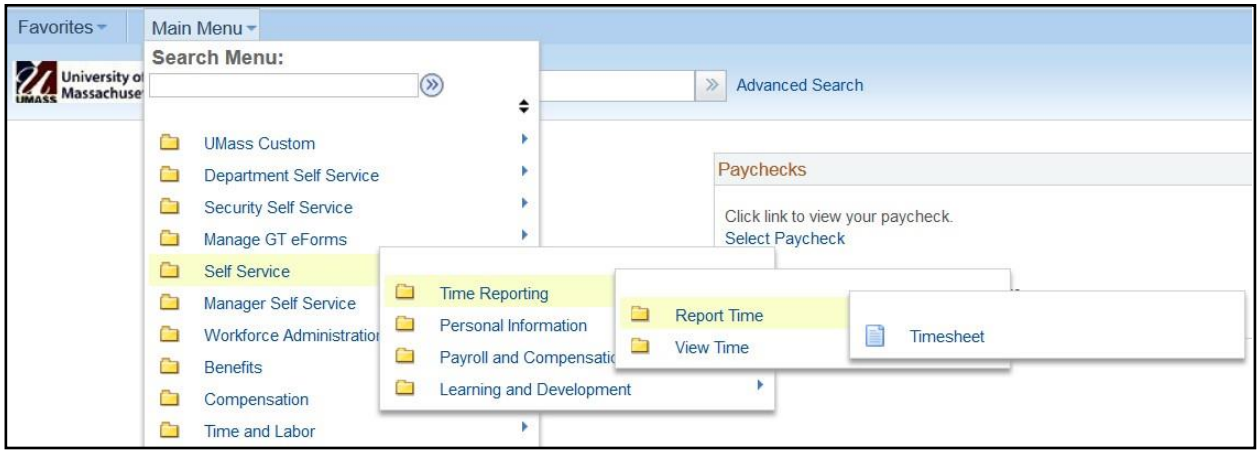
Select Year End Form — Personalize | 1 of 1

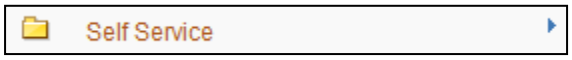
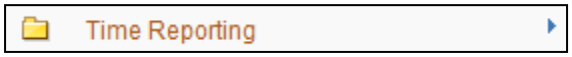
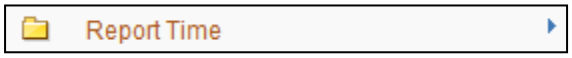
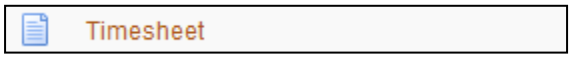
Tax Year	W-2 Reporting Company	Tax Form ID	Issue Date	Year End Form	UMass W2 Information
2013	UMS	W-2	01/22/2014	Year End Form	UMass W2 Information

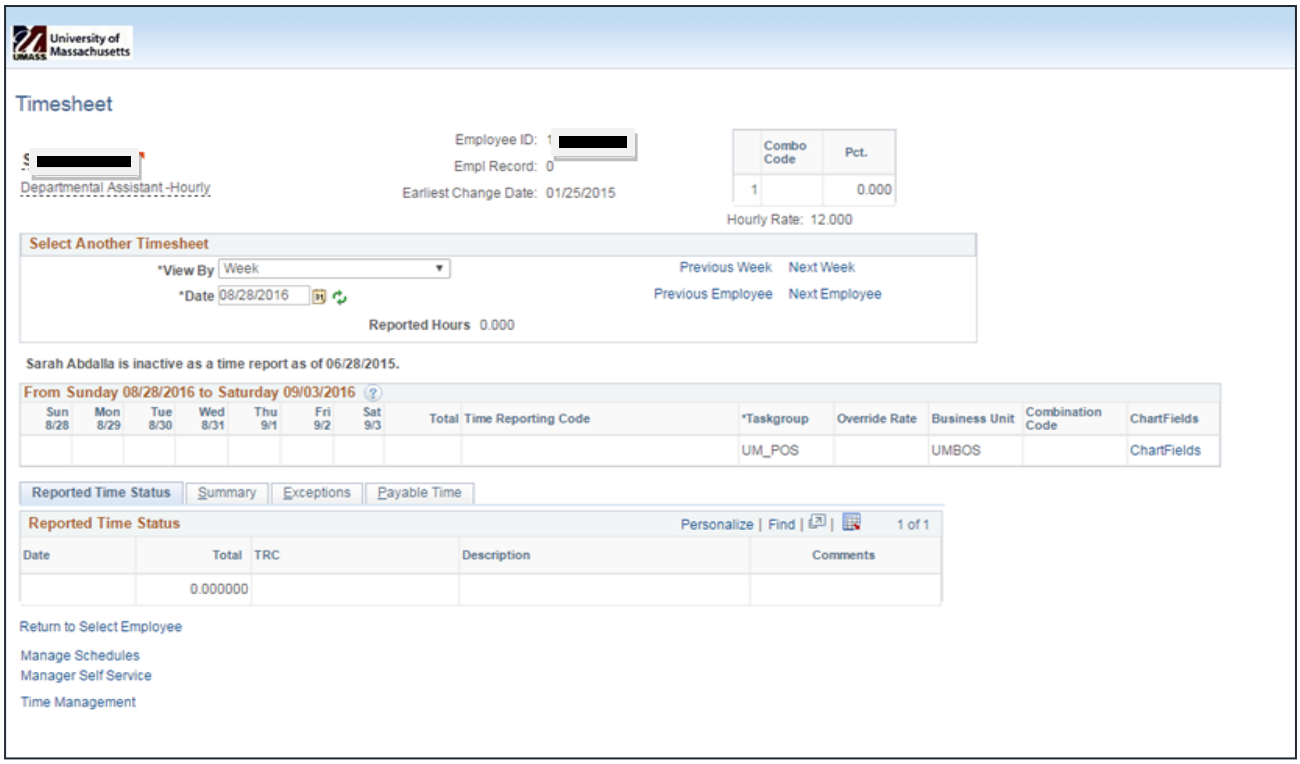
3.	To then view your W-2/W-2C click on ***Year End Form*** link
4.	To get additional information on W-2/W-2C Form click on ***UMASS W2 Information*** link
5.	To view a different tax year click on ***View a Different Tax Year*** link
Note:	Once you are in the forms you may print them utilizing the print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

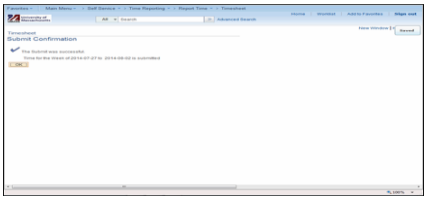
Congratulations you have successfully viewed your W-2/W-2C forms

Reporting Time Using a Timesheet (HOURLY)



Step	Action
1.	Click the **Main Menu** button. 
2.	Click the **Self Service** menu. 
3.	Click the **Time Reporting** menu. 
4.	Click the **Report Time** menu. 
5.	Click the **Timesheet** menu. 
6.	Use the Timesheet page to report hours and time reporting codes for the current week.
Date	This automatically defaults to the beginning of the present week. You can change this date by choosing the calendar icon and clicking on the desired week.

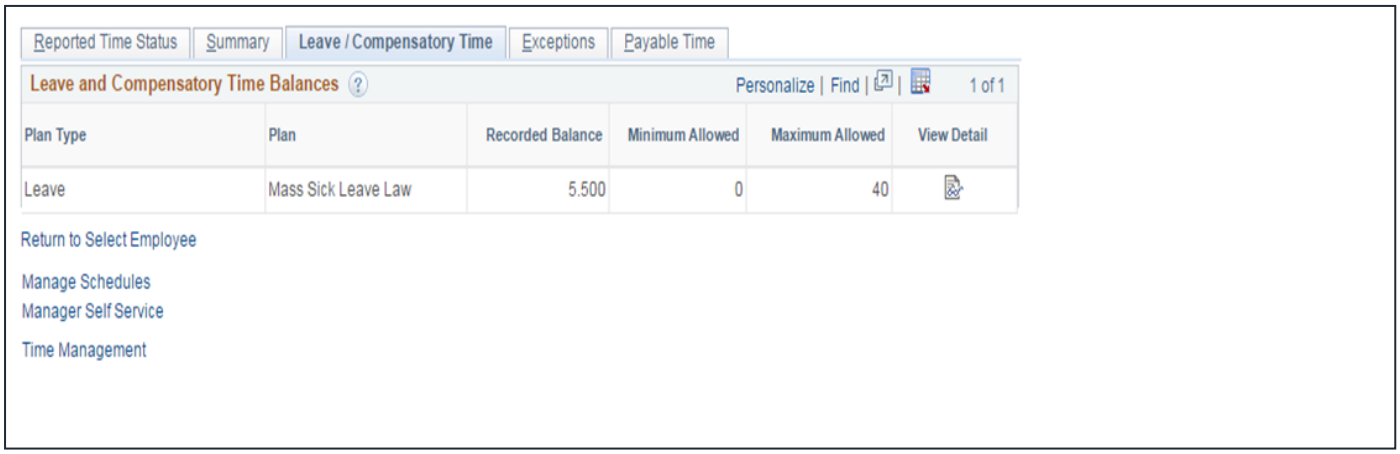


Example:	Example entering Time Mary works 8.00 hours a day Monday through Friday.
	Begin by entering 8.00 in each field of the days that were worked
	Click the Time Reporting Code arrow Choose the code REE – Regular
	Click the Submit button. Submit
	The system will provide you with a confirmation that 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 2016

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	20◀
▶21	🕓22	23	**24**	25	26	27
28	29					

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◀
▶17	🕓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

🕓 Last Day to Input

Bold Payroll Processing Day

▶ Pay Period Begins

◀ Pay Period Ends

Pay day

Holiday

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	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	🕐20	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	🕐17	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

▶ Pay Period Begins

◀ Pay Period Ends

Pay day

Holiday