# ESS - Tasks

This section contains the following topics:



## Career Plan

Career Plan is divided into four (4) options as follows:

### To modify or view a Career Plan:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Click ***Edit Unapproved Career Plan*** to view your unapproved career plan.

   **OR**

   Click ***Fix Approved Career Plan*** to fix your established career plan.

   **OR**

   Click ***Initiate Career Plan*** to create your career plan.

   **OR**

   Click ***View Career Plan*** to view your established career plan.

## *EmpowHR* Education

The education option allows the user to enter data to update their education information.

### To update Education Data:

1. Select the ***Employee Self Service*** menu group.

2. Select the ***Tasks*** menu.

3. Select the ***EmpowHR Education*** component. The Education page (**Figure 415** ) is displayed.

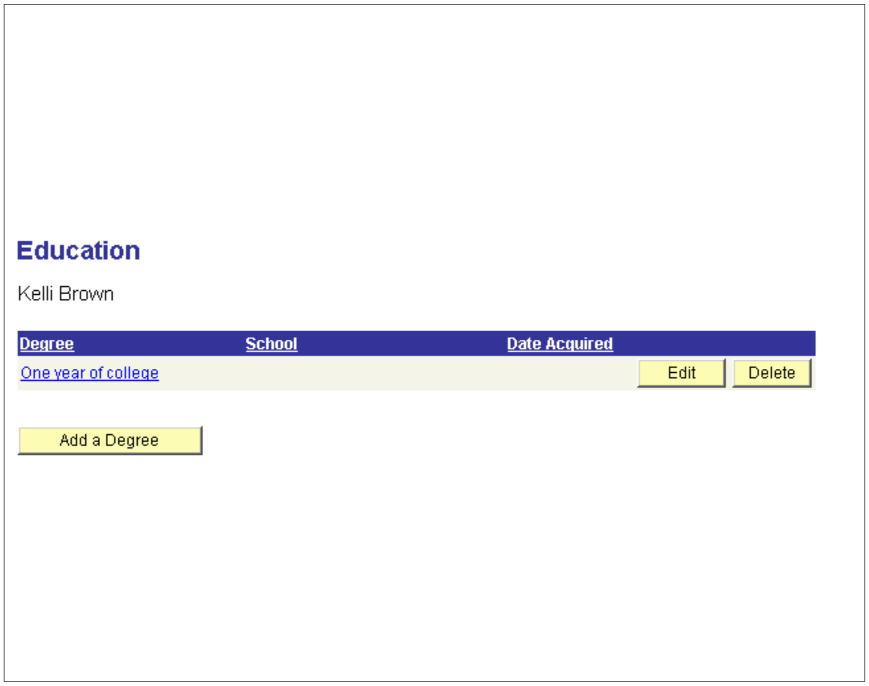


**Figure 415. Education page**

4. Click **Add A Degree**. The Add a Degree - Education page (**Figure 416**) is displayed.

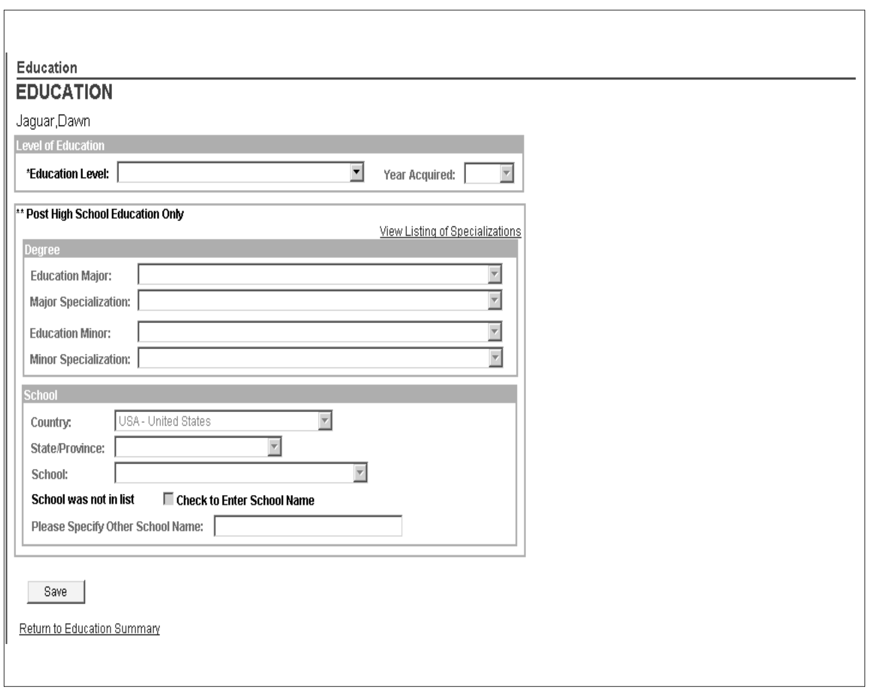


**Figure 416. Add A Degree - Education page**

5. Complete the fields as follows:

***Education Level**

This field identifies the employee's highest level of education based on the number of years of formal schooling and/or academic degrees or certificates. Enter the applicable information or select data from the drop-down list. The valid values are as follows:

| Education Level Valid Values |
|---|
| One year of College |
| 2 Years of College, No Degree |
| 3 Years of College, No Degree |
| 4 Years of College, No Degree |
| Advanced Masters (6 yr degree) |
| Associaed Degree |
| Bachelor's Degree |
| Doctorate Degree |
| Elementary School Completed |
| High School/GED |
| Post Advanced Masters, with degree |
| Post HS, Occupational |
| Post HS, Tech Degree |
| Post HS, Professional Degree |
| Post Bachelor's Degree (Non-degree) |
| Professional (e.i. MD) |
| Some High School |

**Year Acquired**

Enter the year or select data from the drop-down list. This field is used to identify the calendar year during which the employee received the degree or certificate shown for education level.

**Education Major**

Enter the applicable information or select data from the drop-down list. The Education Major field identifies the employee's major field of study beyond high school. Complete this field and Year Degree/Certificate received only if the Educational Level field is:

- Code 6 − Terminal occupational program - certificate of completion, diploma or equivalent.
- Code 10 Associate Degree.

  **OR**
- Code 13 or higher (Bachelor degree or higher).

**Major Specialization**

Enter the applicable information or select data from the drop-down list.

**Minor Major**

Enter the applicable information or select data from the drop-down list. The Education Minor field identifies the employee's minor field of study beyond high school. Complete this field and Year Degree/Certificate received only if the Educational Level field is:

- Code 6 − Terminal occupational program - certificate of completion, diploma or equivalent.
- Code 10 Associate Degree.

  **OR**
- Code 13 or higher (Bachelor degree or higher).

**Minor Specialization**

Enter the applicable information or select data from the drop-down list.

**Country**

This field defaults to `USA United States`. To change the data select from the drop-down list.

**State/Province**

Enter the applicable data or select data from the drop-down list.

**School**

Enter the applicable data or select data from the drop-down list.

**School Was Not In List**

Check this box if the school is not in the drop-down list. If this box is checked, enter the school name in the Please Specify the School Name field.

**Please Specify The School Name**

If the School Was Not In List box is checked, enter the school name.

6. Click **Save**. The Save Confirmation page (**Figure 417**) is displayed.

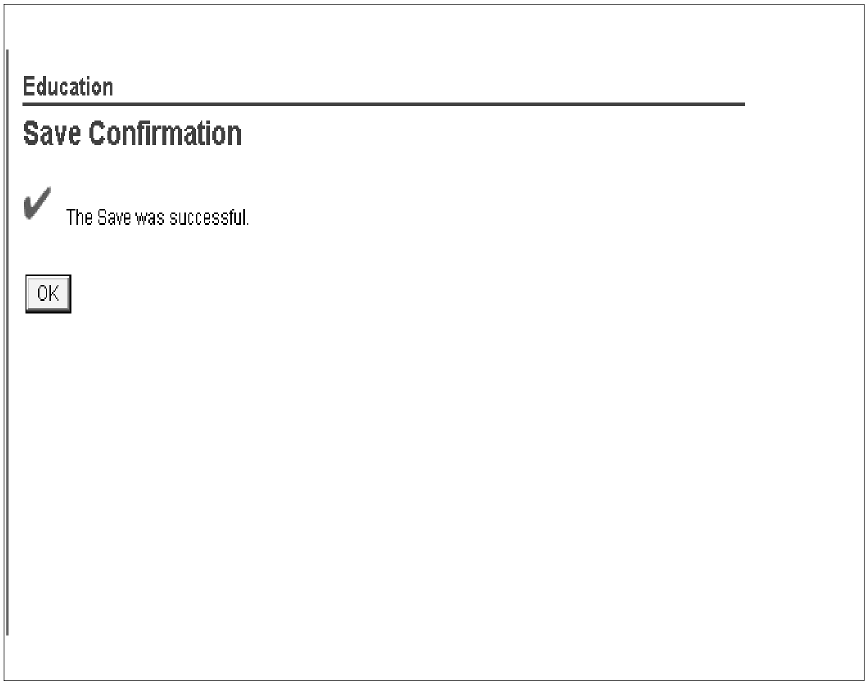


**Figure 417. Save Confirmation page**

**7.** Click **OK**. The Education page (**Figure 415** ) is displayed.

**8.** Click **Edit** to modify the degree.

**OR**

Click **Delete** to delete the degree.

**9.** Click the ***Background Experience*** link.The Background Experience page (**Figure 418** ) is displayed.

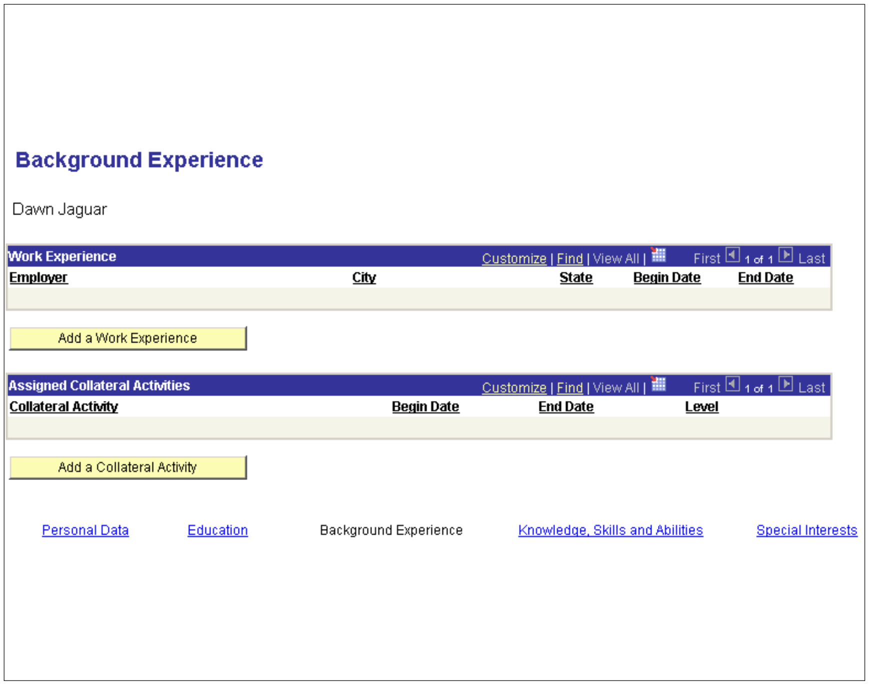


**Figure 418. Background Experience page**

10. Click ***Add A Work Experience*** to add additional work experience. The Work Experience page (**Figure 419** ) is displayed.

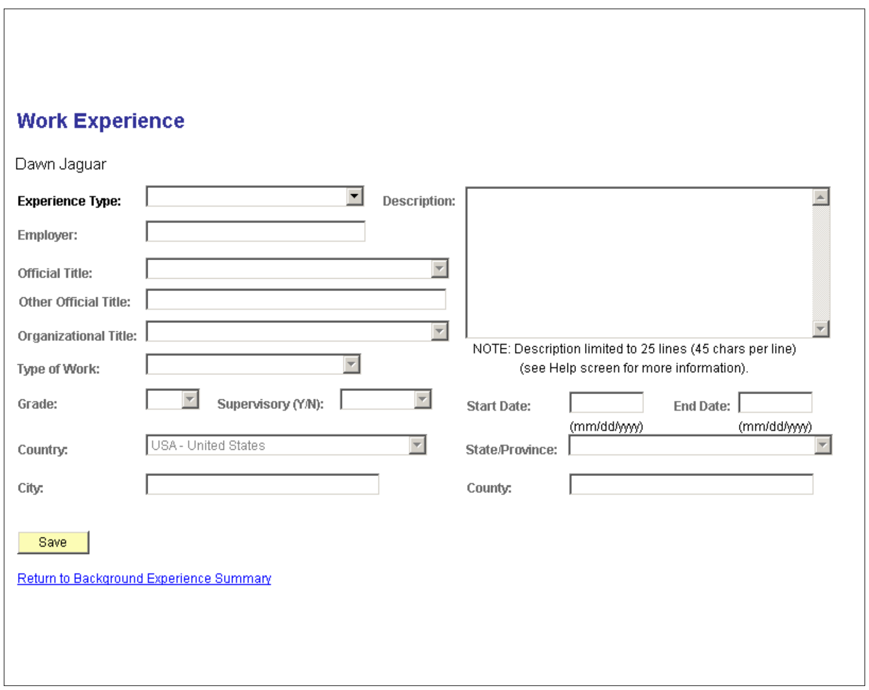


**Figure 419. Work Experience page**

11. Complete the fields as follows:

**Experience**

Enter the applicable information or select data from the drop-down list.

**Description**

Describe your work experience in 25 lines or less.

**Employer**

Enter the employer for this experience.

**Official Title**

Enter the official title or select data from the drop-down list.

**Other Official Title**

Enter the other official title or select data from the drop-down list.

**Organizational Title**

Enter the organization were the experience took place or select data from the drop-down list.

**Type Of Work**

Enter the type of work performed or select data from the drop-down list.

**Grade**

Enter the grade of the work experience.

**Supervisory (Y/N)**

Enter a **`Yes`** if the work experience was in a supervisory capacity or a **`No`** if the work experience was not in a supervisory capacity.

**Start Date**

Enter a start date (mm/dd/yyyy) that the work experience began.

**End Date**

Enter an end date (mm/dd/yyyy) that the work experience ended.

**Country**

This field defaults to **`USA - United States`**. To change data, select from the drop-down list.

**State/Province**

Enter the state of the work experience.

**City**

Enter the city of the work experience.

**County**

Enter a county of the work experience if applicable.

**12.** Click **Save**. The Skills Information menu will display.

**OR**

Click ***Return To Background Experience Summary***.

**13.** Click the Knowledge/Skills/Abilities (KSA's) link. The Knowledge, Skills, and Abilities page (**Figure 420** ) is displayed.

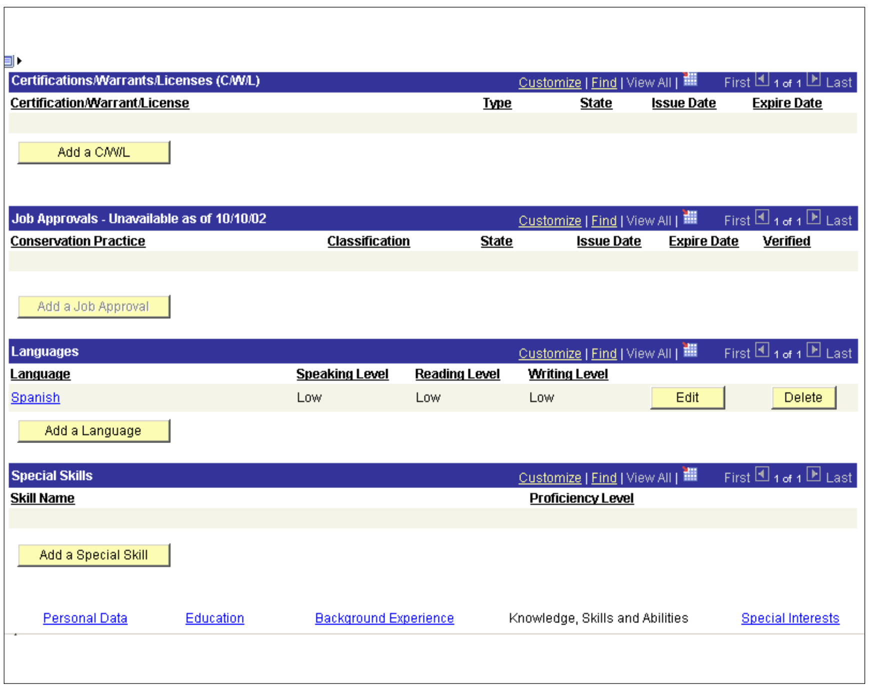


**Figure 420. Knowledge, Skils, and Abilities page**

**14.** Click ***Add a C/W/L***. The Certifications/Warrants/Licenses (C/W/L) page (**Figure 421** ) is displayed.

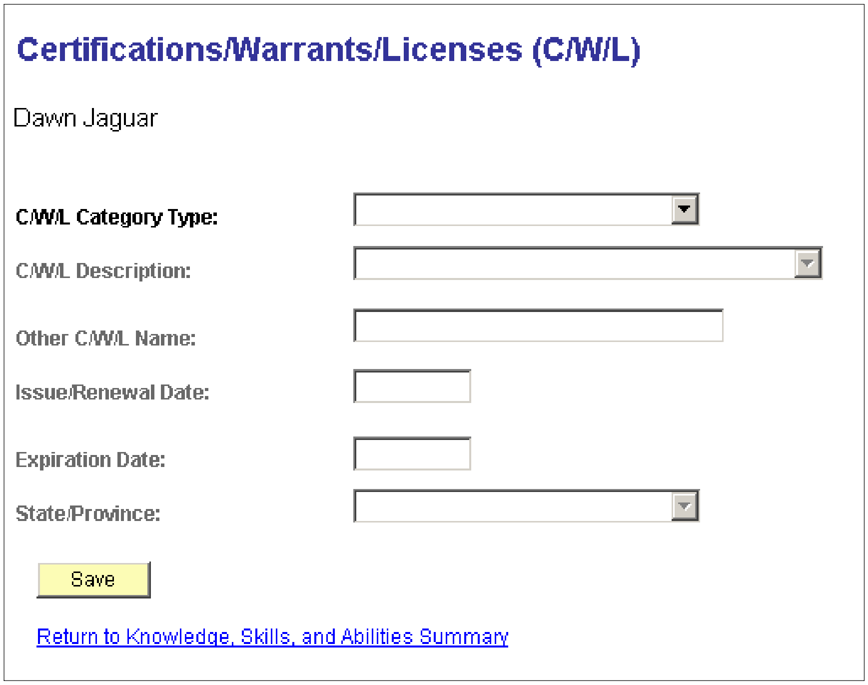


**Figure 421. Certifications/Warants/Licenses (C/W/L) page**

15. Complete the fields as follows:

**C/W/L Category Type**

Enter the applicable information or select data from the drop-down list.

**C/W/L Description**

Enter the applicable information or select data from the drop-down list.

**Other C/W/L Name**

Enter the applicable information or select data from the drop-down list.

**Issue/Renewal Date**

Enter the applicable date.

**Expiration Date**

Enter the applicable date.

**State/Province**

Enter the State/Province or select data from the drop-down list.

16. Click **Save**.

17. Click ***Return To Knowledge, Skills, and Abilities Summary*** The KSA page (**Figure 420**) is displayed.

# Exit Interview

This section will explain how to enter data for an exit interview.

### To enter data for an Exit Interview:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Exit Interview*** component. The Find An Existing Value tab - Exit Interview page (**Figure 422** ) is displayed.

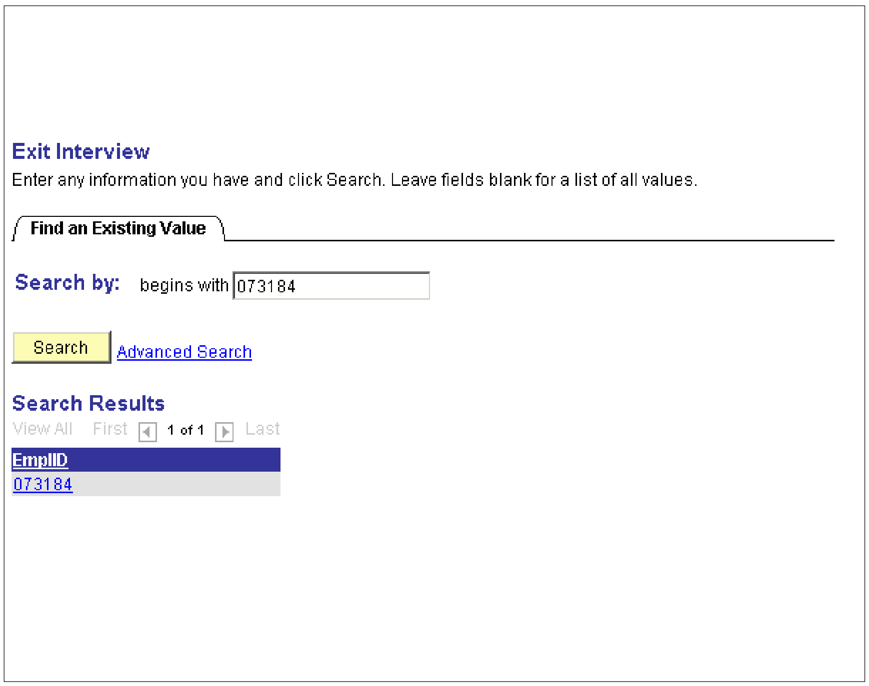


**Figure 422. Find An Existing Value tab - Exit Interview page**

4. Complete the field as follows:

**Search By/Begins With**

Enter the EmplID.

5. Click **Search**. The Exit Interview page (**Figure 423**) is displayed.

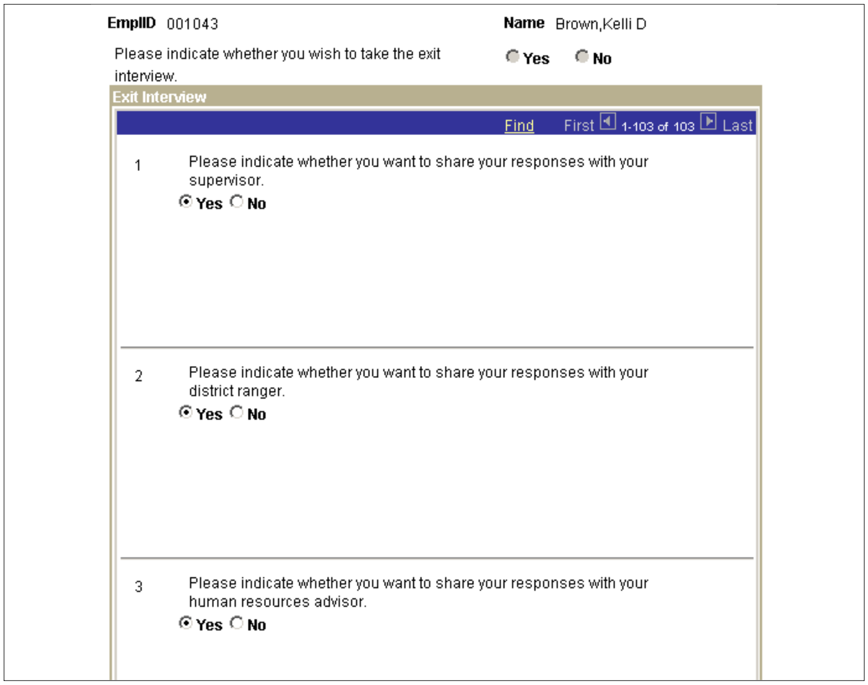


**Figure 423. Exit Interview page**

6. Complete the field as follows:

**Please Indicate Whether You Want To Take The Exit Interview**

Check **`Yes`** or **`No`** as applicable.

**Decline Date**

If **`No`** is checked, enter the decline date or select a date from the calendar icon

**Note**: On the Exit Interview page, there are 103 questions that required selecting an option or completing a narrative. Answer all of the questions.

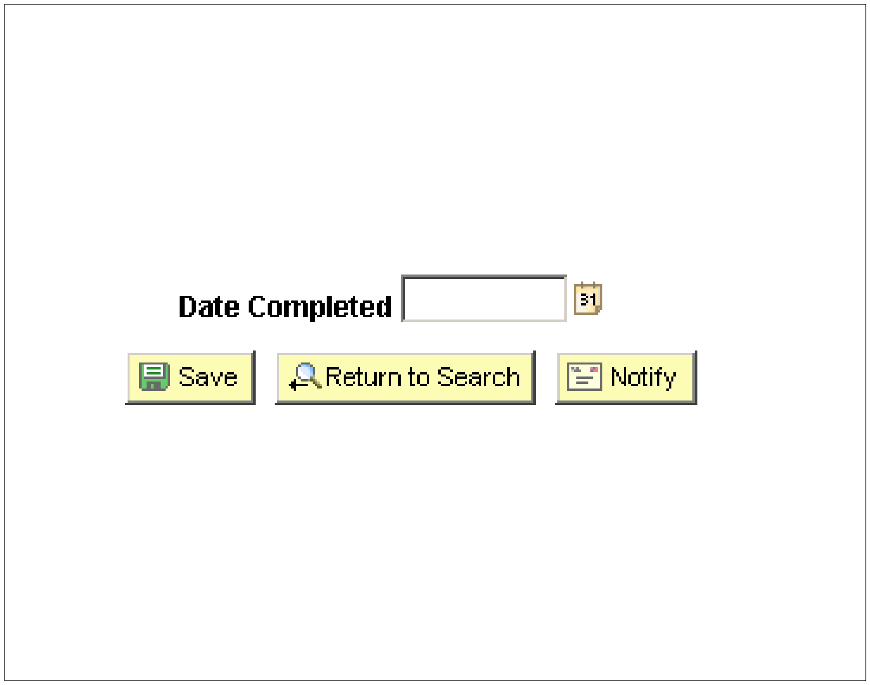


**Figure 424. Exit Interview page**

7. Complete the field as follows:

**Date Completed**

Enter the date the exit interview was completed or select a date from the calendar icon.

8. Click **Save**.

9. Click **Return To Search**. The Find An Existing Value tab - Exit Interview page (**Figure 422**) is displayed.

**OR**

Click **Notify** to send this information to the next individual in the workflow.

## Job Classification Request

The Job Classification component allows the user to request the reclassification of an existing position. An employee can request their position to be reclassified or a manager can initiate a reclassification on a subordinate's position. The reclassified position does not get recreated in this section. This section will provide the steps to request a Job Classification.

**To add or update an existing Job Classification Request::**

1. Select the ***Employee Self Service*** menu group.

2. Select the ***Task*** menu.

3. Select the ***Job Classification*** component. The Find An Existing Value tab - Classification Request page (**Figure 425**) is displayed.

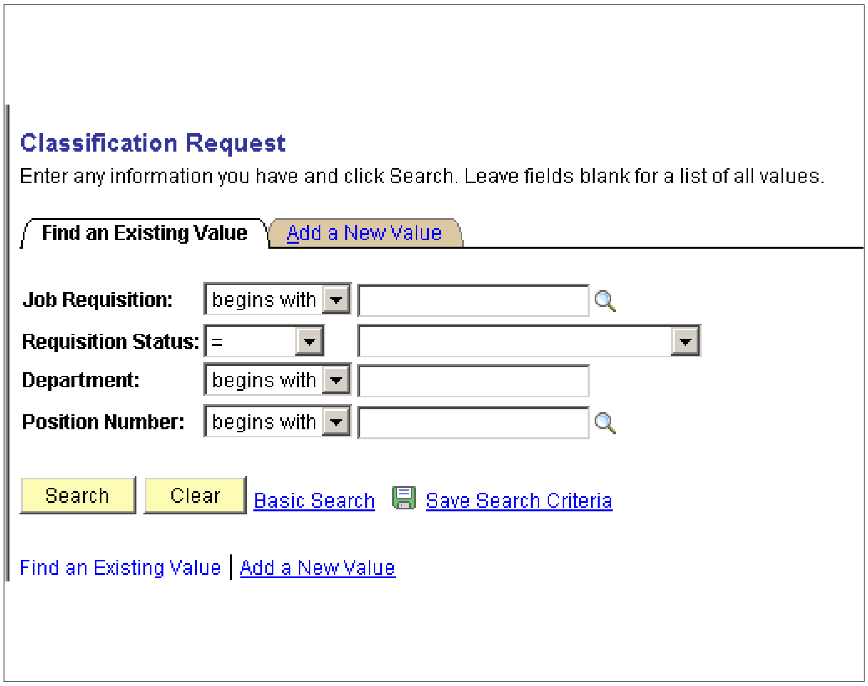


**Figure 425. Find An Existing Value tab - Classification Request page**

4. Complete the fields as follows:

**Job Requisition**

Select a search criteria for the drop-down list then enter the job requisition. Valid values are **`Begins With`** (The data starts with a specific character.), **`Contains`** (The data contains specific characters.), **=** (The data is equal to.), **`Not =`** (The data is not equal to.), **<** (The data is less than.), **<=** (The data is less than or equal to.), **>** (The data is greater than.), **>=** (The data is greater than or equal to.), **`Between`** (The data is within a range of two values.), and **`In`** (The data is within a field.).

**Requisition Status**

Select a search criteria for the drop-down list then enter the requisition status. Valid values are **`Contains`** (The data contains specific characters.), **=** (The data is equal to.), **`Not =`** (The data is not equal to.), **<** (The data is less than.), **<=** (The data is less than or equal to.), **>** (The data is greater than.), **>=** (The data is greater than or equal to.), **`Between`** (The data is within a range of two values.), and **`In`** (The data is within a field.).

**Department**

Select a search criteria for the drop-down list then enter the department information. Valid values are **`Begins With`** (The data starts with a specific character.), **`Contains`** (The data contains specific characters.), **=** (The data is equal to.), **`Not =`** (The data is not equal to.), **<** (The data is less than.), **<=** (The data is less than or equal to.), **>** (The data is greater than.), **>=** (The data is greater than or equal to.), **`Between`** (The data is within a range of two values.), and **`In`** (The data is within a field.).

**Position Number**

Select a search criteria for the drop-down list then enter the position number. Valid values are **`Begins With`** (The data starts with a specific character.), **`Contains`** (The data contains specific characters.), **=** (The data is equal to.), **`Not =`** (The data is not equal to.), **<** (The data is less than.), **<=** (The data is less than or equal to.), **>** (The data is greater than.), **>=** (The data is greater than or equal to.), **`Between`** (The data is within a range of two values.), and **`In`** (The data is within a field.)

5. Click **Search**. The Job Classification Request page (**Figure 427** ) is displayed.

   **OR**

   Click **Clear** to clear the entry.

   **OR**

   Select the ***Add A New Value*** tab. The Add A New Value tab - Classification Request page (**Figure 426**) is displayed.

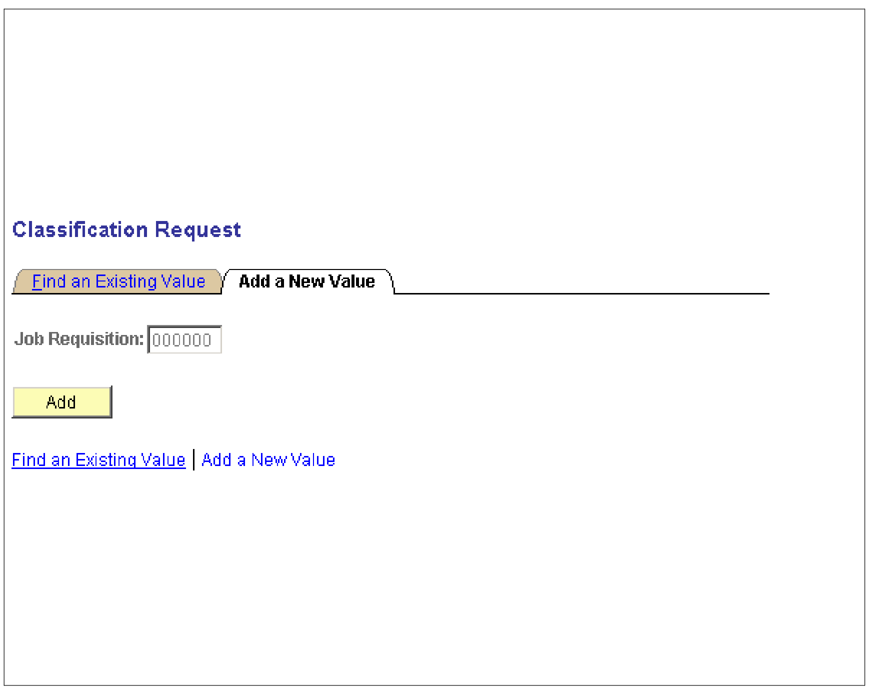


**Figure 426. Add A New Value tab - Classification Request page**

6. Complete the fields as follows:

**Job Requisition**

Enter the job requisition.

7. Click **Add**. The Job Classification Request page (**Figure 427** ) is displayed.

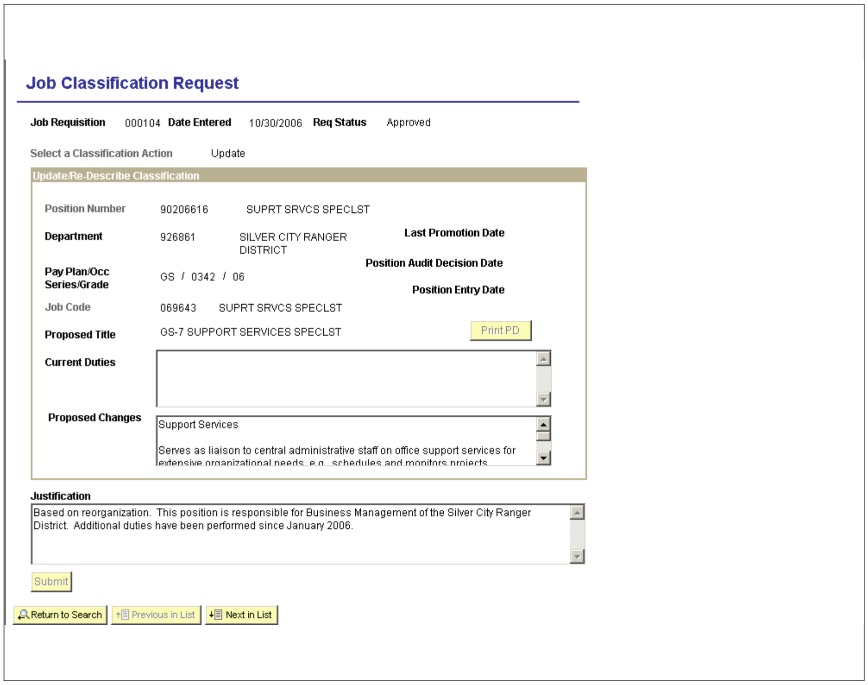


**Figure 427. Job Classification Request page**

8. Complete the fields as follows:

**Note:** There are fields on this page that are populated from other pages and cannot be modified.

**Job Requisition**

This field is populated.

**Date Entered**

This field is the system date or the current date and cannot be changed.

**Req Status**

This field is populated.

**Select A Classification Action**

This field defaults to `Update` and cannot be changed.

**Position Number**

If the employee is in more than one position, select the position to be classified. If there is one position, the field will default to that position.

**Pay Plan/Occ Series/Grade**

This field is populated from the position number selected.

**Last Promotion Date**

This field is populated and cannot be changed.

**Position Audit Decision Date**

This field is populated and cannot be changed.

**Position Entry Date**

This is the date the position was entered and cannot be changed.

**Job Code**

This field is populated from the position number selected.

**Proposed Title**

Enter the proposed title of the position.

**Current Duties**

This field displays the current duties of the position.

**Proposed Changes**

Enter the proposed changes to the position.

**Justification**

Enter the justification for the change.

9. Click **Submit**. The request is entered into the workflow for approval and processing. Your Position Request Has Been Entered Into Workflow (99999999,999) pop-up (**Figure 428** ) is displayed.

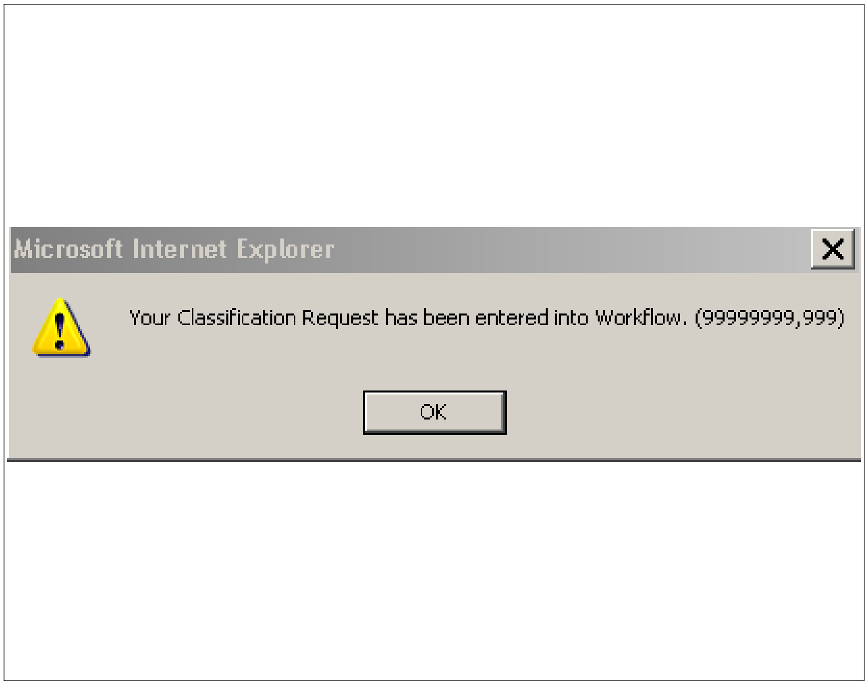


**Figure 428. Your Position Request Has Been entered Into Workflow pop-up**

10. Click **OK**. The Job Requisition and the Requisition Status have changed. The approver (the Manager of the request's Initiator) will receive an email and the job requisition will become a workflow item on their worklist.

11. Click **Print PD** to print a copy of the job description.

## Personnel Actions

Provided below are instructions for entering a personnel action.

**To enter a Personnel Action:**

1. Select the ***Employee Self Service*** menu group.

2. Select the ***Tasks*** menu.

3. Select the ***Personnel Actions*** component. The Personnel Action Proposed Effective Date page (**Figure 429**) is displayed.


**Figure 429. Personnel Action Proposed Effective Date page**

1. Complete the fields as follows:

**Date Of Request**

This field is populated.

**Proposed Effective Date**

Enter the proposed effective date or select a date from the calendar icon.

2. The Personnel Action PAR Category page (**Figure 430**) is displayed

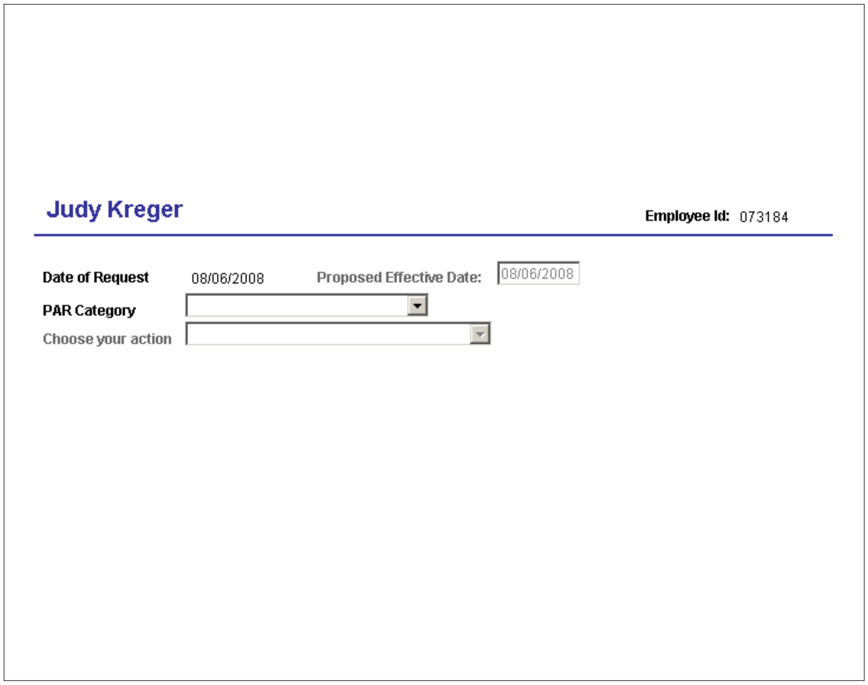


**Figure 430. Personnel Action Par Category page**

3. Complete the fields as follows:

**Date Of Request**

This field is populated.

**Proposed Effective Date**

This field is populated with the date entered on the Personnel Action Proposed Effective Date page (**Figure 429**).

***PAR Category**

Select data from the drop-down list. The valid values are: **`Change Request`**, **`Placement in Non Pay Status`**, **`Placement in Pay Status`**, **`Resignation`**, **`Retirement`**, and **`Travel Savings Incentives`**.

***Choose Your Action**

Select data from the drop-down list. The valid values for this field will depend on the selection made on the PAR Category field.

4. The Personnel Action page (**Figure 431**)is displayed.

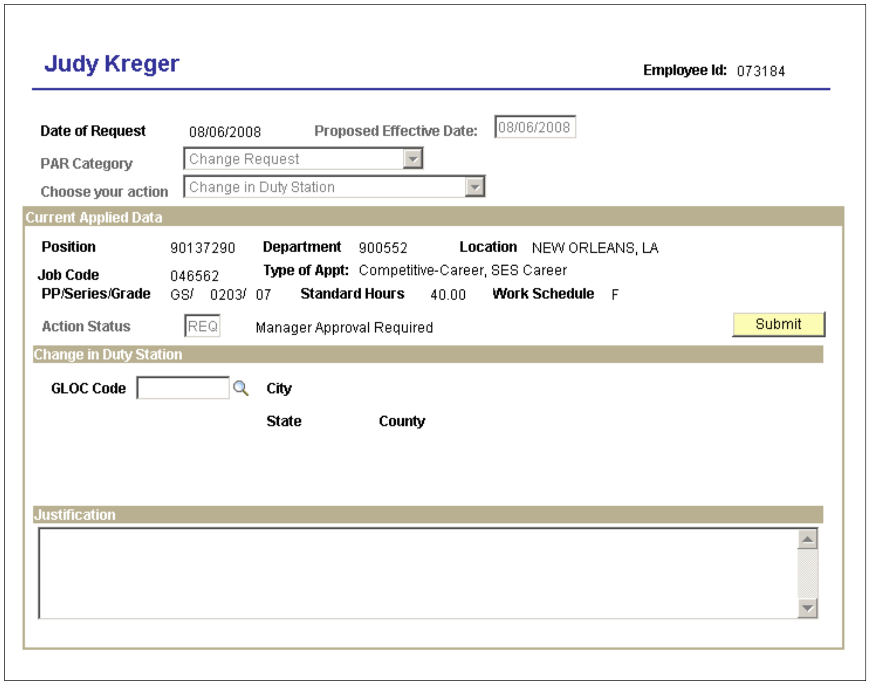


**Figure 431. Personnel Action page**

5. Complete the fields as follows:

**Date Of Request**

This field is populated.

**Proposed Effective Date**

This field is populated with the date entered on the Personnel Action Proposed Effective Date page (**Figure 429**).

***PAR Category**

This field is populated with the selection on the Personnel Action PAR Category page (**Figure 430**).

***Choose Your Action**

This field is populated with the selection on the Personnel Action PAR Category page (**Figure 430**).

**Position**

This field is populated.

**Department**

This field is populated.

**Location**

This field is populated.

**Job Code**

This field is populated.

**Type Of Appt**

This field is populated.

**PP/Series/Grade**

This field is populated.

**Standard Hours**

This field is populated.

**Work Schedule**

This field is populated.

**Action Status**

This field is populated.

**GLOC Code**

Enter the GLOC code.

**City**

This field is populated based upon the GLOC Code entered.

**State**

This field is populated based upon the GLOC Code entered.

**County**

This field is populated based upon the GLOC Code entered.

**Justification**

Enter the justification for the action.

6. Click **Submit** to submit the personnel action. The Workflow Confirmation pop-up (**Figure 432**) is displayed.

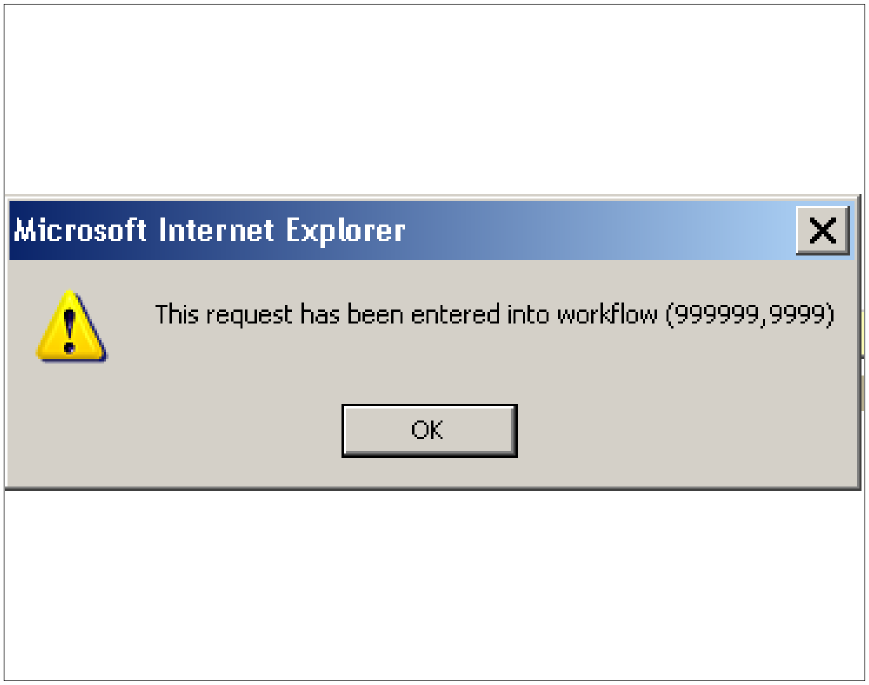


**Figure 432. Workflow Confirmation pop-up**

7. Click **OK**. The Successfully Saved Confirmation pop-up (**Figure 433**) is displayed.

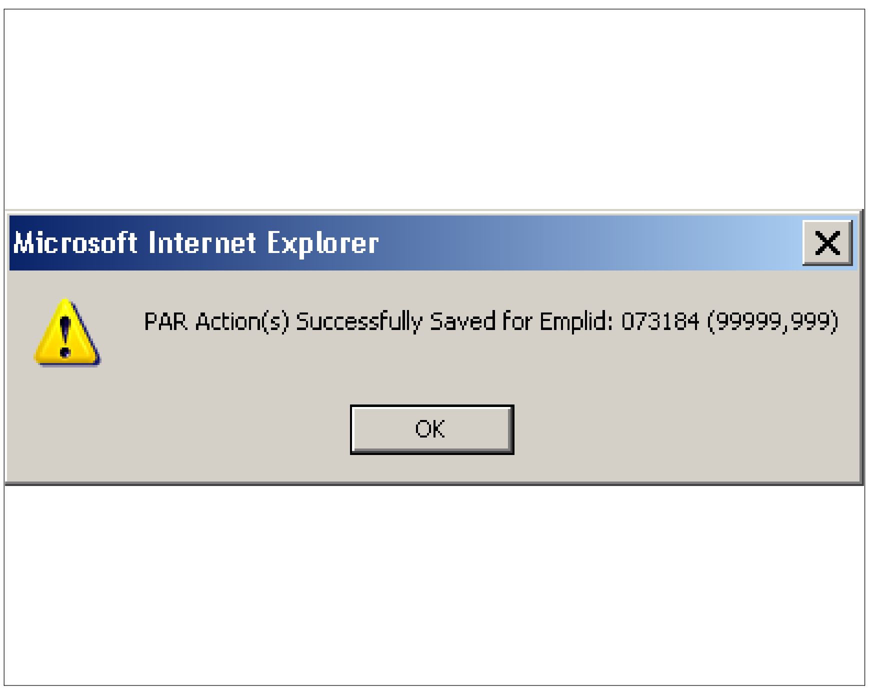


**Figure 433. Successfully Saved Confirmation pop-up**

8. Click **OK**.

# Skills Information

Provided below are instructions for entering Skill Information.

This section is divided into the following topics:



## *Personal Data*

This section explains how to view/modify your Personal Data.

This section includes the following topics:

### To view/modify your personal data:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu
3. Select the ***Skills Information*** component. The Skills Information page (**Figure 434**) is displayed.


**Figure 434.  Skills Information page**

## *Education*

This section allows the user to update Education data.

**To update education data:**

4. Click ***Education***. The Education page (**Figure 435**) is displayed.

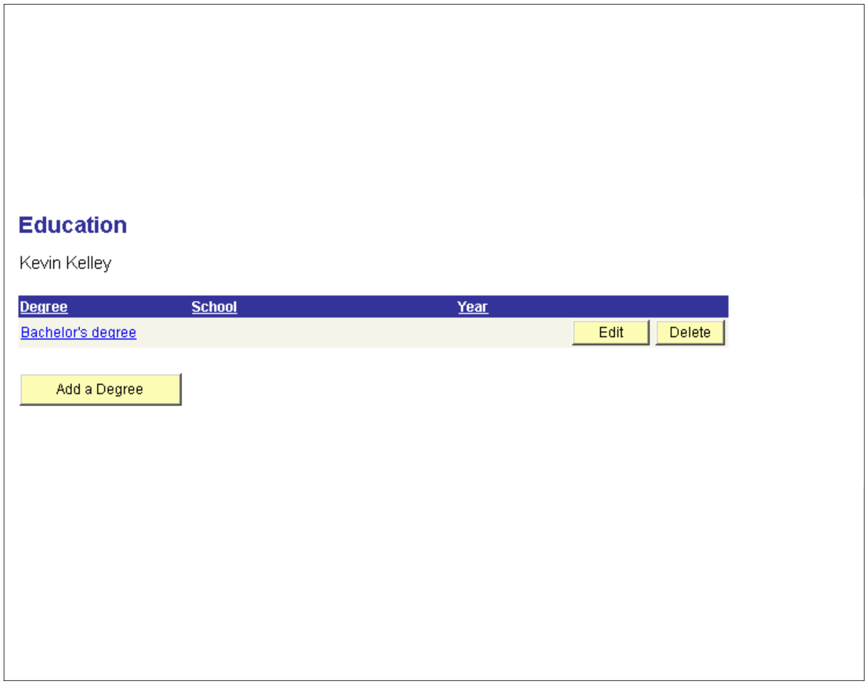


**Figure 435. Education page**

5. Click **Add A Degree**. The Education Detail page (**Figure 436** ) is displayed.

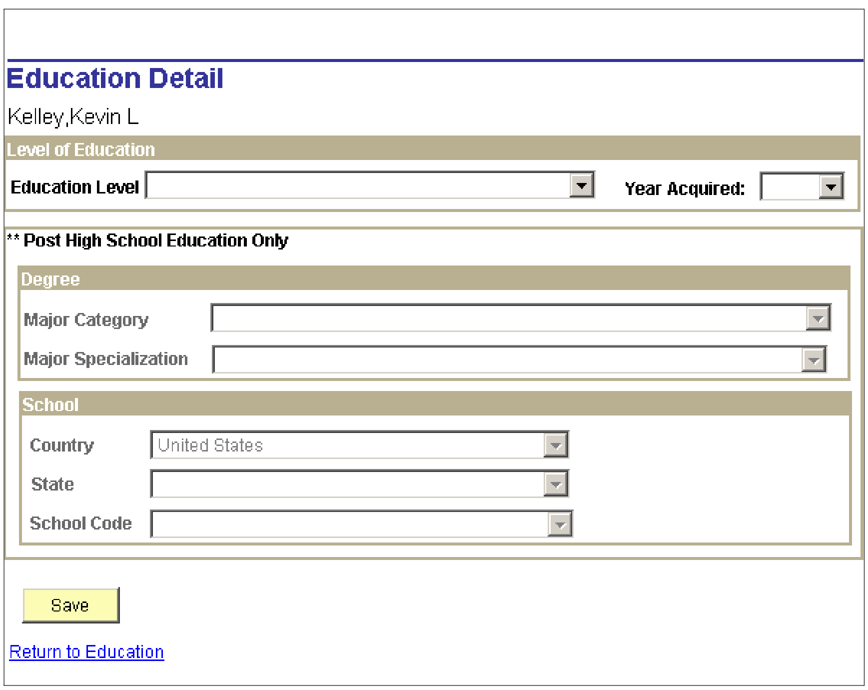


**Figure 436. Education Detail page**

6. Complete the fields as follows:

***Education Level**

Enter the applicable data or select data from the drop-down list.

**Year Acquired**

Enter the applicable year or select data from the drop-down list.

**Major Category**

Enter the applicable data or select data from the drop-down list.

**Major Specialization**

Enter the applicable data or select data from the drop-down list.

**County**

Enter the applicable data or select data from the drop-down list.

**State/Province**

Enter the applicable data or select data from the drop-down list.

**School**

Enter the applicable data or select data from the drop-down list.

7. Click **Save**. The Save Confirmation page (**Figure 437** ) is displayed.

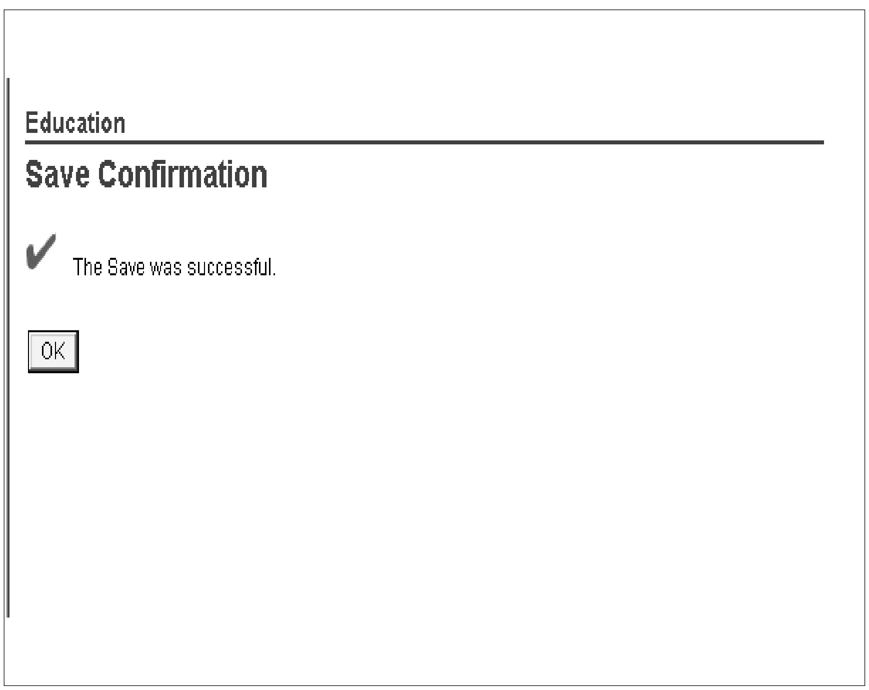


**Figure 437. Save Confirmation page**

8. Click **OK**.

### *Languages*

9. Click ***Add A Language***. The Languages page (**Figure 438** )is displayed.

**Note**: You can also Add a Language from the Skills Information menu.

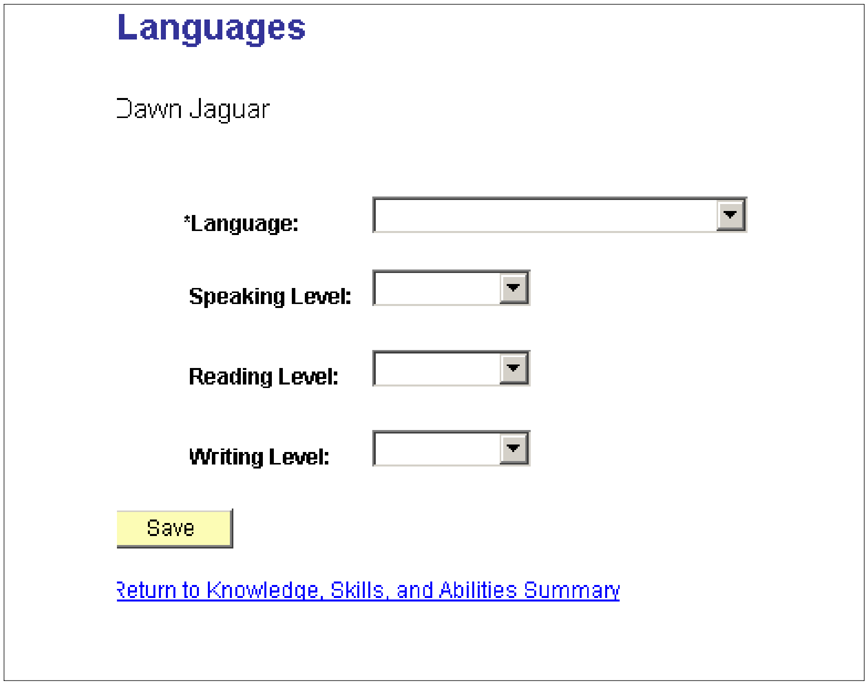


**Figure 438. Languages page**

10. Complete the fields as follows:

***Language**

Enter the language or select a language from the drop-down list.

**Speaking Level**

Enter the speaking level of the language selected or select a speaking level from the drop-down list.

**Reading Level**

Enter the reading level of the language selected or select a reading level from the drop-down list.

**Writing Level**

Enter the writing level of the language selected or select a writing level from the drop-down list.

11. Click **Save**. The Knowledge, Skills, and Abilities page (**Figure 420** ) is displayed.

12. Click ***A Special Skill***. The Special Skill page (**Figure** ) is displayed.

**Note**: You can also add a Special Interests from the Skills Information menu.

**Figure 439. Special Skill page**

13. Complete the fields as follows:

**Skill Description**

Enter a skill or select a skill from the drop-down list.

**Other Skill Description**

Enter another skill.

**Proficiency Level**

Enter the proficiency level of the skill or select a level from the drop-down list.

Click **Save**.

14. Click ***Return To Knowledge, Skills, and Abilities Summary*** The KSA page (**Figure 420**)is displayed. Select the links on the bottom of the page to return to the selections on the Skills Information page (**Figure 434** ).

## *Honors And Awards*

## *Special Interests*

### To enter special interests:

15. Click the ***Special Interests*** option. The Special Interests page (**Figure 440**) is displayed.

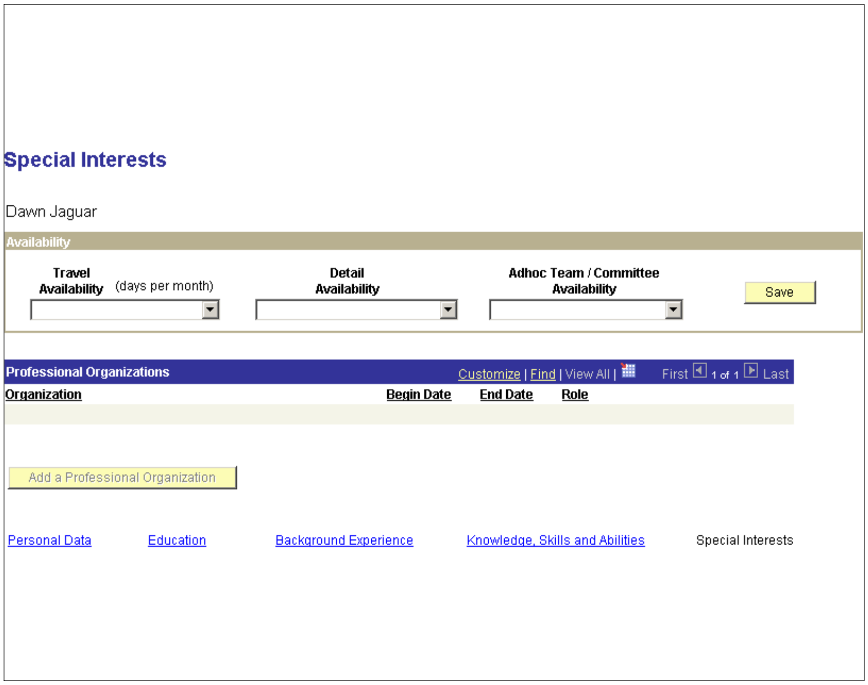


**Figure 440. Special Interests page**

16. Complete the fields as follows:

**Travel Availability (Days Per Month)**

Enter the applicable information or select data from the drop-down list.

**Detail Availability**

Enter the applicable information or select data from the drop-down list.

**Adhoc Team/Committee Availability**

Enter the applicable information or select data from the drop-down list.

17. Click **Save**. The ***Add A Professional Organization*** button is activated.

18. Click ***Add A Professional Organization***. The Add A Professional Organization page (**Figure 441**) is displayed.

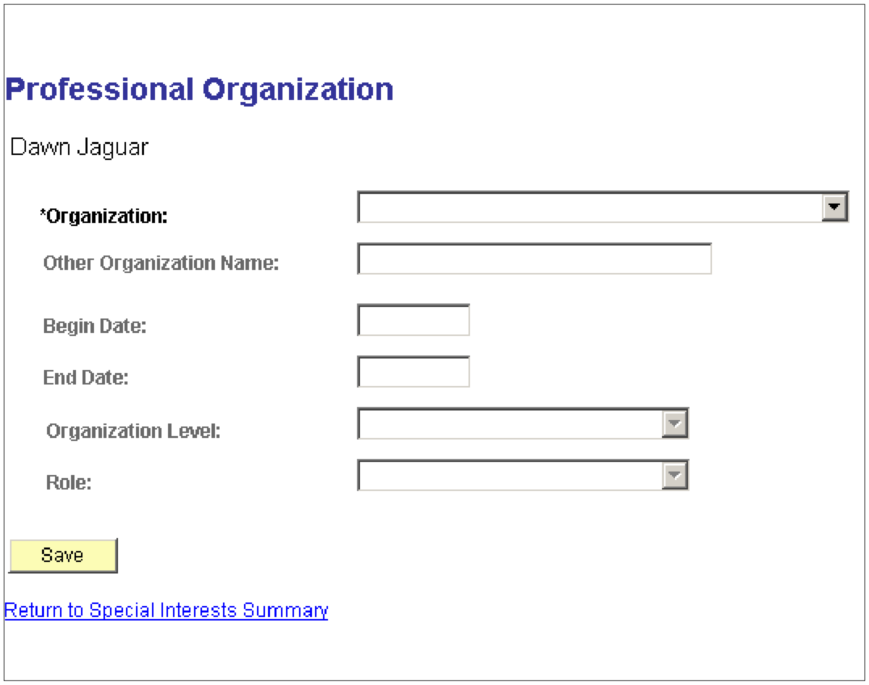


**Figure 441. Professional Organization page**

19. Complete the fields as follows:

***Organization**

Enter the organization or select data from the drop-down list.

**Other Organization Name**

This is a non-entry field.

**Begin Date**

Enter a date or select a date from the calendar icon.

**End Date**

Enter a date or select a date from the calendar icon.

**Organization Level**

Enter the applicable information or select data from the drop-down list.

**Role**

Enter the role or select a role from the drop-down list.

20. Click **Save**. The Special Interest page (**Figure 440** ) is displayed. Select the links on the bottom of the page to return to the selections on the Skills Information page (**Figure 434** ).

## *Languages*

**21.** Click the ***Languages*** option. The Languages page (**Figure 442** ) is displayed.

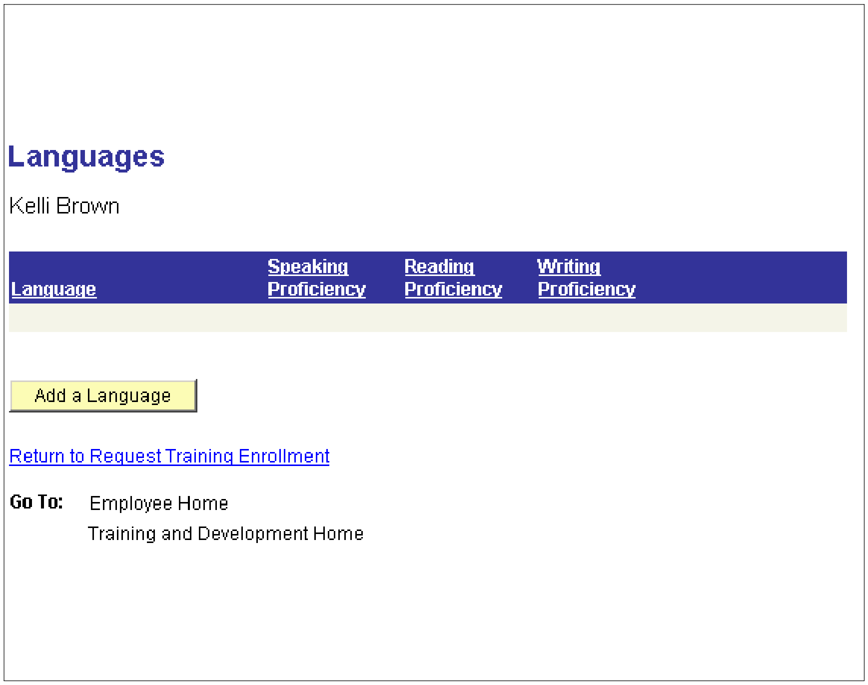


**Figure 442. Languages page**

**22.** Click ***Add A Language***. The Language Detail page (**Figure 443** ) is displayed.

**OR**

Click ***Return To Request Training Enrollment*** link.

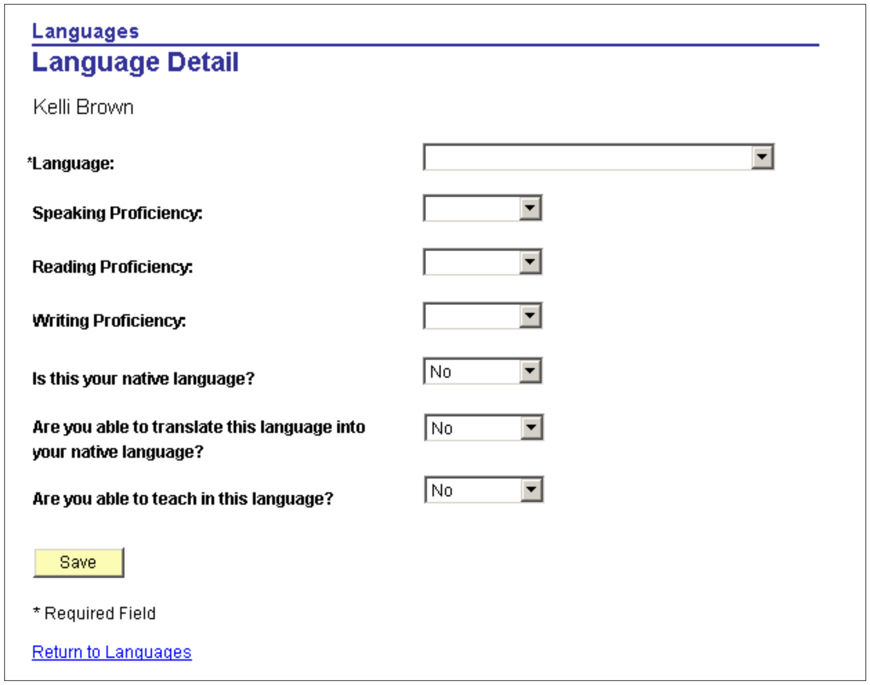


**Figure 443. Language Detail page**

23. Complete the fields as follows:

**Language**

Enter the language or select data from the drop-down list.

**Speaking Level**

Enter the applicable data or select data from the drop-down list.

**Reading Level**

Select data from the drop-down list.

**Writing Level**

Select data from the drop-down list.

**Is This Your Native Language?**

Enter the applicable data or select data from the drop-down list.

**Are You Able To Translate This Language?**

Enter the applicable data or select data from the drop-down list.

**Are You Able To Translate This Language?**

Enter the applicable data or select data from the drop-down list.

24. Click **Save**.

25. Click ***Return To Languages*** to add another language.

### *Licenses/Certificates*

1. Click the ***Licenses And Certificates*** option. The Licenses and Certificate page (**Figure 444** ) is displayed.

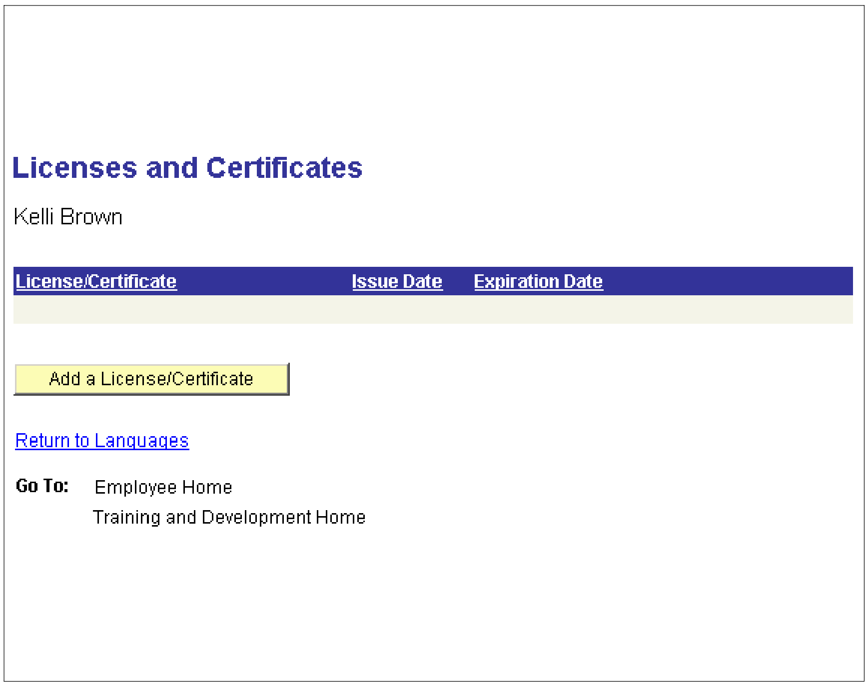


**Figure 444. Licenses/Certificates page**

2. Click the ***Add A Licence/Certificate***. The Licenses/Certificates Detail page (**Figure 445**) is displayed.

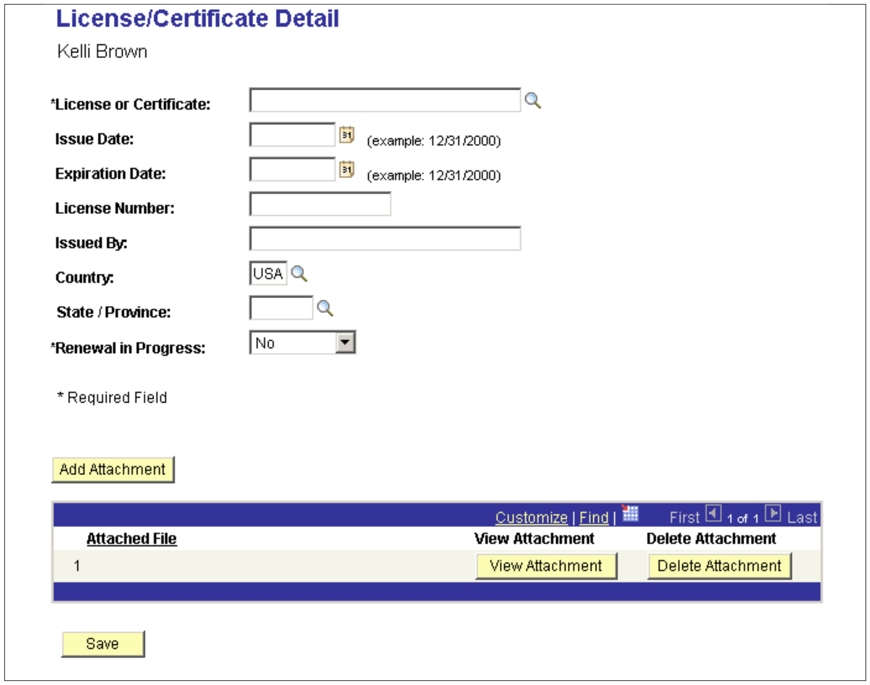


**Figure 445. Licenses/Certificates Detail page**

3. Complete the fields as follows:

***License Or Certificate**

Select the applicable data by clicking the search icon.

**Issue Date**

Enter the date the license or certificate was issued or select a date from the calendar icon. (XX/XX/XXXX)

**Expiration Date**

Enter the data the license or certificate expires or select a date from the calendar icon. (XX/XX/XXXX)

**License Number**

Enter the license or certificate number.

**Country**

This field defaults to **USA**. Change data by clicking on the search icon.

**State/Province**

Enter the state/province where the license/certificate was acquired.

***Renewal in Progress**

This field defaults to **No**. Change by selecting data from the drop-down list.

**School**

Enter the applicable data or select data from the drop-down list.

4. Click **Add Attachment** to attach the applicable information. The Add Attachment file page (**Figure 446** ) is displayed

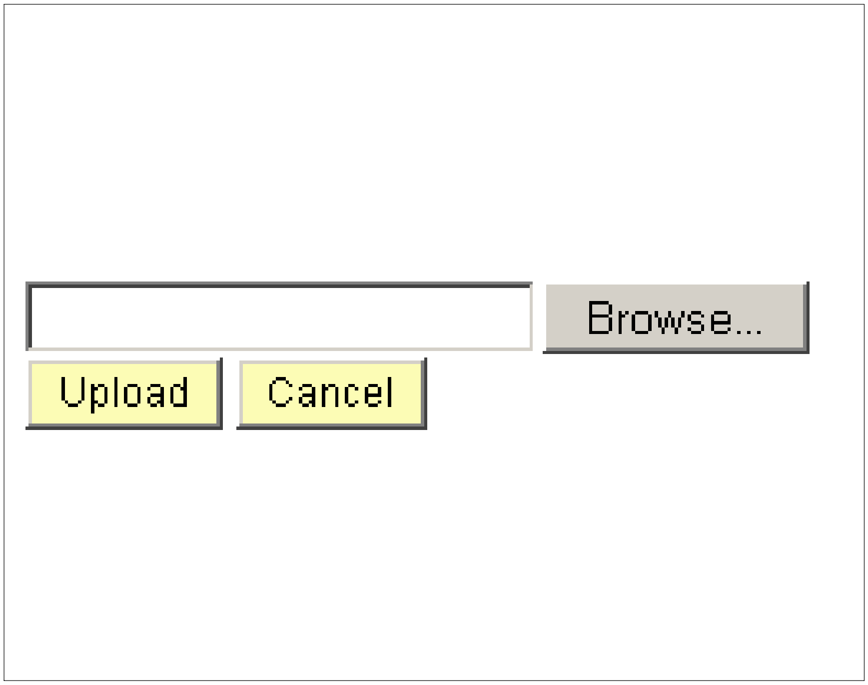


**Figure 446. Add Attachement page**

5. Click **Browse** and select the document to attach.
6. Click **Upload** to add an attachment.

   **OR**

   Click **Cancel** to return to the Licenses/Certificates Detail page (**Figure 445**).

7. Click **Save**.
8. Click **OK**.

## *Memberships*

## *Professional Training*

This example will provide the steps to enter a Professional Training Course. You can also edit or delete a training course once the training course has been established.

9. Click the ***Professional Training*** option. The Professional Training page (**Figure 447** ) is displayed.

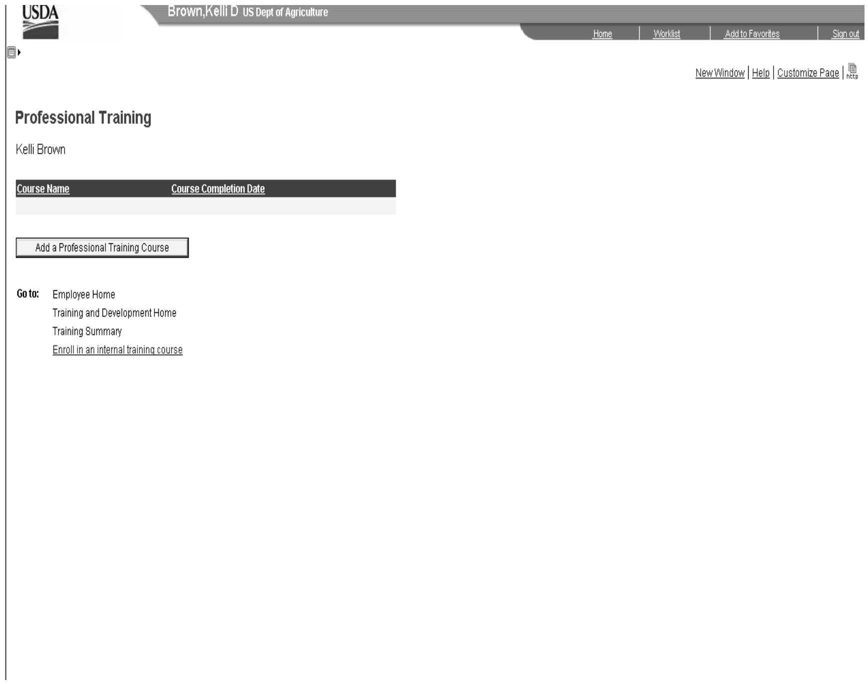


**Figure 447. Professional Training page**

10. Click ***Add A Professional Training Course***. The Professional Training Detail page (**Figure 448** ) is displayed.

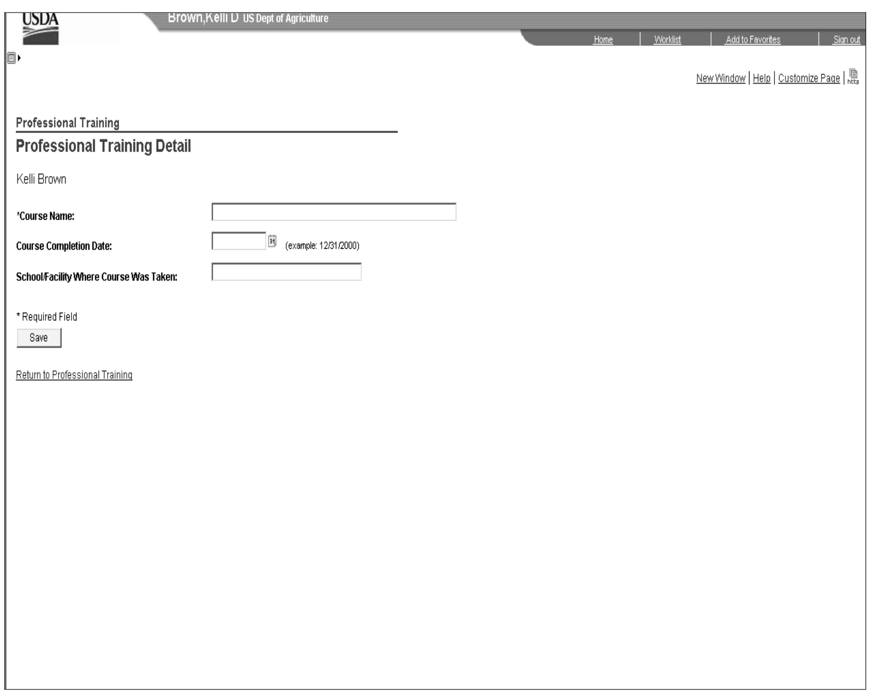


**Figure 448. Professional Training Detail page**

**11.** Complete the fields as follows:

***Course Name**

Enter the the course name.

**Course Completion Date**

Enter the date the course was completed or select a date from the calendar icon.

**School/Facility Where Course Was Taken**

Enter the school/facility where the course was taken.

**12.** Click **Save**.

**13.** Click ***Enroll In An Internal Training Course***. The Request Training Enrollment page (**Figure 449**) is displayed.

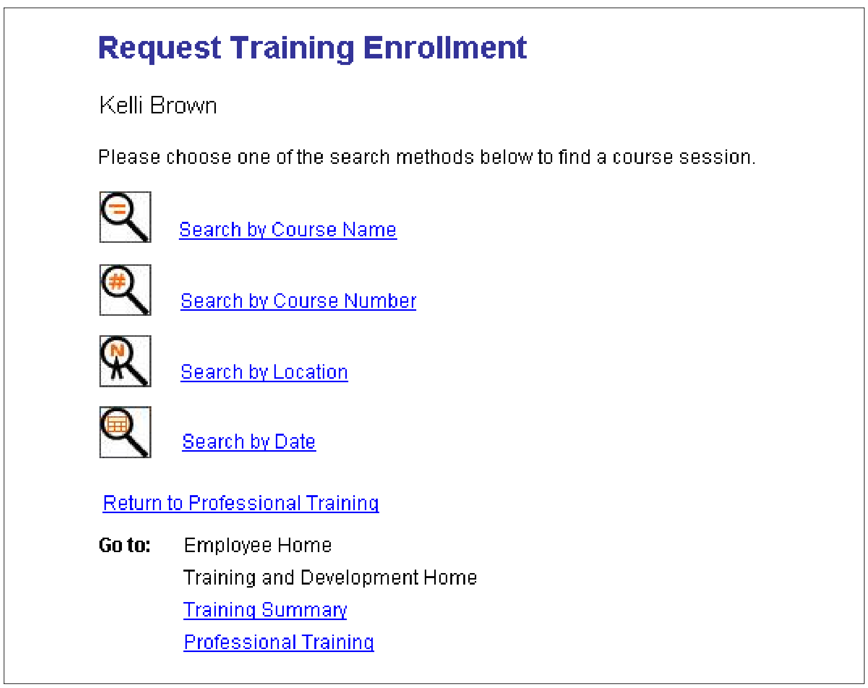


**Figure 449. Request Training Enrollment page**

Note: Select the applicable link to search for a course session or to return to the prior menu options.

**14.** Click **Save**.

# Payroll Documents

The Payroll Documents module of ***EmpowHR*** contains payroll and benefit related information. Employees can access and update their own data. The ESS Payroll Documents have additional instruction in the application to mimic the Employee Personal Page located on the NFC's Home Page for ease of use.

This section is divided into the following topics:



## *Charitable Contributions*

A charitable contribution is the authorization by an employee to withhold, through payroll deductions, contributions for the CFC.

Any employee whose duty station is located within an approved CFC area, and whose net pay is sufficient to cover the allotment, may authorize payroll deductions for charitable contributions. Employees may choose to have CFC contributions submitted to two different campaign areas. Included are employees whose appointments are limited to 1 year or less, provided an appropriate official of the employing agency determines the employee will continue employment for a period sufficient to justify the allotment. The allotment will be an equal amount deducted each pay period (minimum $1.00). The allotment will be for a term of 1 year beginning with the first pay period that begins in January and ending with the last pay period that begins in December.

No deductions are made for any pay period in which the employee's net pay is insufficient to cover the deduction amount. When an employee has insufficient coverage of an allotment, the agency may establish a standard order in which the deduction is made, or they may request the employee to designate the order in which deductions are made. No adjustments are made in subsequent pay periods to make up for deductions not made to cover the authorized amount.

All CFC contributions are automatically discontinued only upon expiration of the 1-year withholding period, in the event of death or retirement, or upon separation from Federal service.

A charitable contribution is the authorization by an employee to withhold, through payroll deductions, contributions for the CFC.

Following are guidelines for processing charitable contribution data:

- Since most of the CFC documents are processed for Pay Period 1, enter the CFC data as soon as possible.
- Do not enter one-time cash contributions in EmpowHR; send the contribution directly to the designated charity or federated group.
- An employee may discontinue an allotment at any time by submitting a signed letter or memorandum to the personnel office. The document must include the employee's name, the amount, and the organization from which the contribution is being revoked. The cancellation is effective in the pay period it is entered into the system.
- The Office of Personnel Management regulations provide that allotment authorizations be transferred when an employee moves to an organization serviced by a different payroll office. A new authorization form should be completed only if an authorization was in effect with the losing department on the date of transfer.
- The maximum number of charitable contribution records allowed is two.

This example will show how to enter data for an employee who wants to (1) authorize, (2) change, or (3) cancel biweekly payroll deductions for charitable contributions to the Combined Federal Campaign.

**To add/change/cancel Charitable Contributions:**

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Payroll Documents*** component. The Charitable Contributions page is displayed.

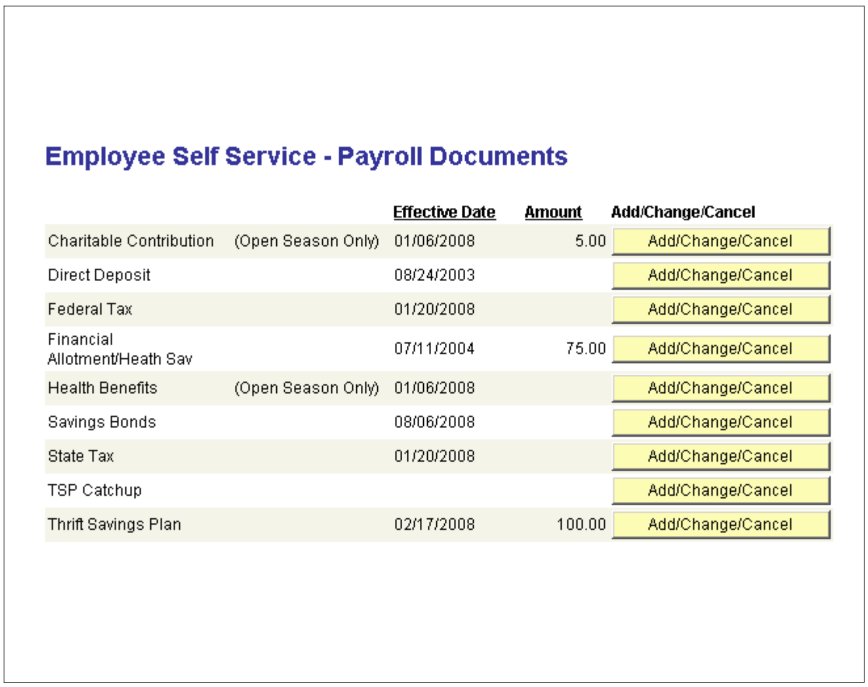


**Figure 450. Employee Self Service - Payroll Documents page**

**4.** Select ***Add/Change/Cancel*** next to Charitable Contributions. The Charitable Contributions page (**Figure 451** ) is displayed.

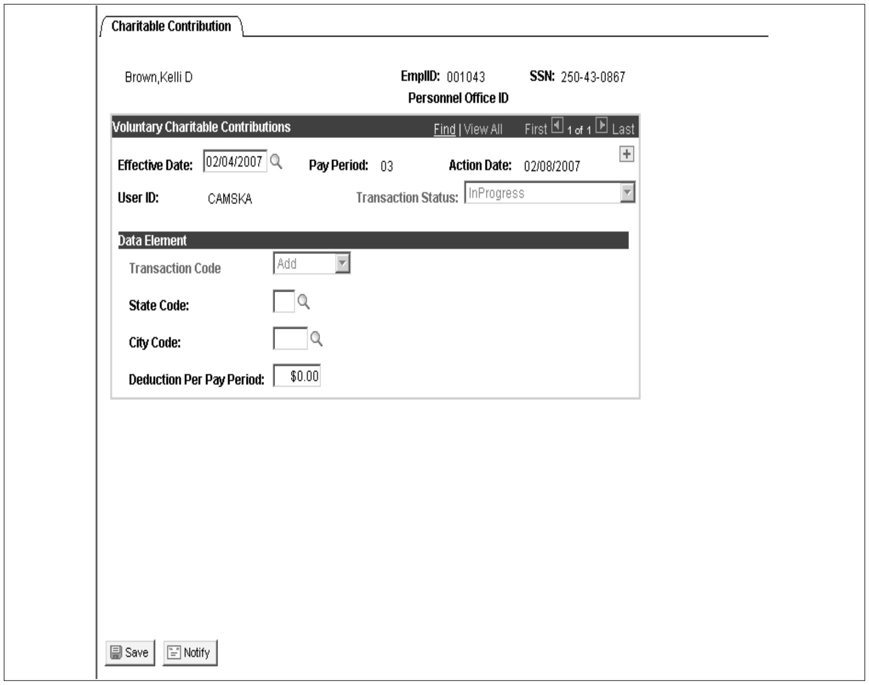


**Figure 451. Charitable Contributions page**

**5.** Complete the fields as follows:

**Effective Date**

Enter the date the charitable contribution was entered or select data by clicking the search icon.

**Action Date**

This field is populated and cannot be changed.

**User ID**

This field is populated when the employee signs on to Employee Self Service.

**Transaction Status**

This field defaults to `In Progress` and reflects the status of the transaction. The transaction status will change when the transaction is saved, in SINQ, or resent to NFC.

**Transaction Code**

Enter the applicable information or select data from the drop-down list. The valid values are **`Add`**, **`Change`**, and **`Delete`**.

**State Code**

Enter the state code or select data by clicking on the search icon.

**City Code**

Enter the city code or select data by clicking on the search icon.

**Deduction Per Pay Period**

Enter the amount of charitable deduction to be withheld per pay period.

6. Click **Save**.
7. Click **OK**.

### *Direct Deposit*

Direct Deposit allows net pay of net pay into a checking or savings account at a financial organization through DD/EFT. It is the employee's pay after deductions, which is transmitted through DD/EFT to a financial organization. A net pay allotment is the direct deposit of net pay into a checking or savings account at a financial organization through DD/EFT.

Before beginning the following information in needed

- Bank Routing Number
- Employee's Account Number
- Type of Account (Savings or Checking) into which the deposit will be made

This section contains the following topics:

[Changing Net Pay](#)
[Canceling Net Pay](#)

### *Changing Net Pay*

Once the employee is participating in direct deposit, an employee can:

- Change the depositor account number
- Change from a checking to a savings account or vice versa
- Change from one financial organization to another
- Change the routing number of a financial organization

### *Cancelling Net Pay*

To cancel a direct deposit authorization, enter the new check mailing address data or designated agent code in the Employee Address document. You must enter the new check mailing address or designated agent number; otherwise the salary will continue to be disbursed to the financial organization through DD/EFT.

**To cancel Net Pay data:**

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Payroll Documents*** component.
4. Select the ***Add/Change/Cancel*** Direct Deposit The Direct Deposit page (**Figure 452** ) is displayed.

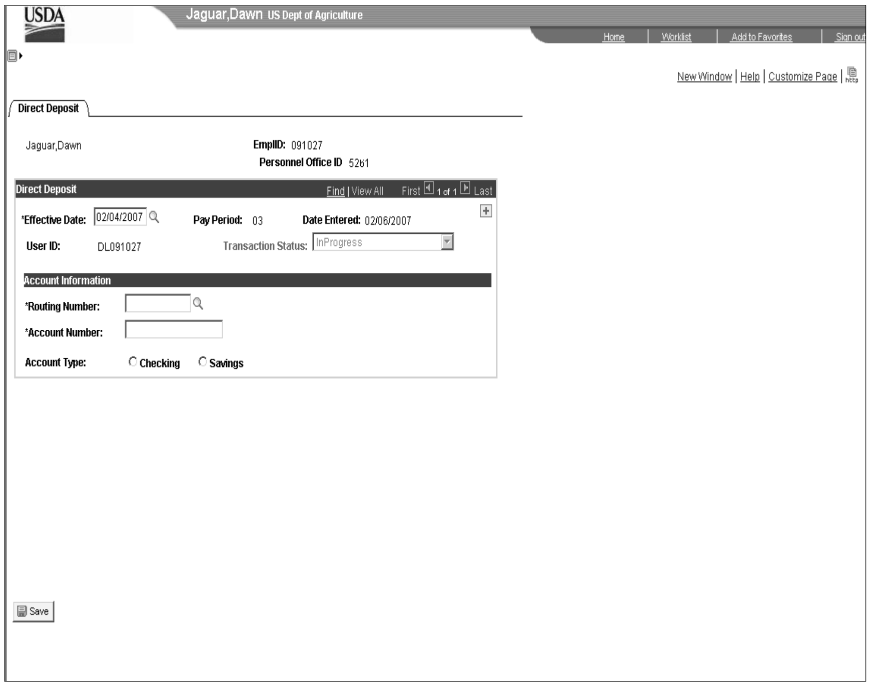


**Figure 452. Direct Deposit page**

5. Complete the fields as follows:

**Effective Date**

This field is automatically populated with the beginning date of the current pay period. Change the date if applicable.

**Date Entered**

This date is populated.

**User ID**

This field is populated when the employee signs on to Employee Self Service.

**Transaction Status**

This field defaults to `In Progress` and reflects the status of the transaction. The transaction status will change when the transaction is saved, in SINQ, or resent to NFC.

***Routing Number**

Enter the routing number of the bank or select data by clicking on the search icon.

***Account Number**

Enter the account number of the direct deposit.

**Account Type/Checking**

Check this box if the account is a checking account

**Account Type/Savings**

Check this box if the account is a savings account.

**School**

Enter the applicable data or select data from the drop-down list.

6. Click **Save**.
7. Click **OK**.

## *Federal Tax Data*

Federal tax is withheld through payroll deductions based on the processing of Form W−4. Federal income tax withholding is based on an IRS formula that includes a calculation of TSP contributions, the number of allowances claimed, and a tax-withholding table for marital status. From this calculation, the tax amount is determined based on the taxable income amount and the tax percentage.

Federal income tax is withheld based on the processing of Form W−4. If a W−4 is not processed, Federal income tax will be automatically be withheld at the rate of single with zero exemption until a W−4 is processed.

A Federal income tax certificate does not need to be processed for employees reassigning to another agency serviced by NFC within the same department. However, employees transferring from one department to another department serviced by NFC must submit a new W−4 at the time the accession action is processed.

An employee may choose to claim exempt if no Federal tax was owed the prior year and the employee does not expect to owe any tax in the current year. The employee must file a W−4 before February 15 of each year if total exemption is claimed. Otherwise, tax withholding will automatically be withheld based on single with zero exemptions.

**Note**: Employees whose duty station is the Republic of Panama, Virgin Islands, Guam or the Northern Mariana Islands, may be exempt from Federal income tax. If exempt, the employee must file a W−4 indicating *Exempt* status.

Before beginning, the following information is needed:

- Marital Status of the employee.
- Total number of tax exemptions to be claimed by the employee.
- Any additional withholding amount (in dollars and cents) − **NOTE**: this is an optional field.

**To add/change/cancel Federal Tax data:**

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Payroll Documents*** component.
4. Select the ***Add/Change/Cancel*** Federal Tax. The Federal Tax page (**Figure 453** ) is displayed.

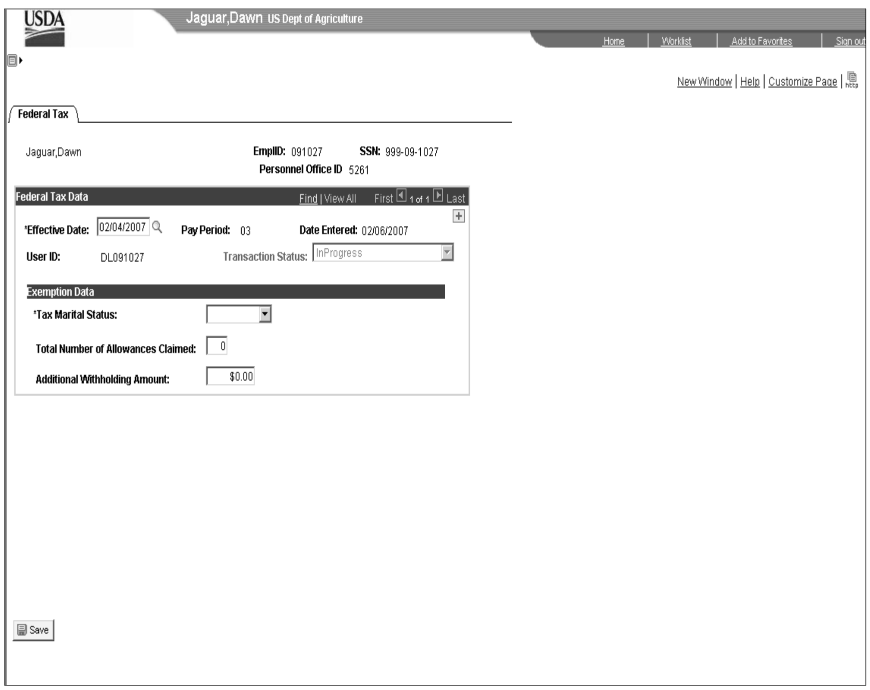


**Figure 453. Federal Tax Data page**

5. Complete the fields as follows:

**Effective Date**

This field is populated with the beginning date of the current pay period. This field can be changed. Select data by clicking on the search icon.

**User ID**

This field is populated when the employee signs on to Employee Self Service.

**Transaction Status**

This field defaults to `In Progress` and reflects the status of the transaction. The transaction status will change when the transaction is saved, in SINQ, or resent to NFC.

***Tax Marital Status**

Enter the tax marital status or select data from the drop-down list. The valid values are:

**Total Number Of Allowances Claimed**

Enter the number of exemption.

**Additional Withholding Amount**

Enter the additional amount to be withheld over the amount deduction for the number of exemptions.

6. Click **Save**.

7. Click **OK**.

### *Financial Allotments*

Financial Allotments are voluntary deductions to financial institutions with direct deposit. This does not include such items as charity, savings bonds, thrift savings, garnishments, union, or other organizational dues. For these changes, see your personnel office.

In order to participate in Health Savings Plan, you must participate in a High Deductible Health Plan, have no other insurance coverage other than those specifically allowed (e.g., disability, dental, vision, long−term care and limited expense flexible spending accounts) and not be claimed as a dependent on someone else's tax return. Filing jointly as a spouse does not mean you are a dependent on your spouse's tax return. You cannot contribute to an HSA if you participate in a general−purpose health care flexible spending account (HCFSA), a spouse's HCFSA, a spouse's family enrollment in other non−high deductible health insurance coverage, TRICARE, Medicare or have received VA benefits within the previous three months.

The following options are available for a Financial Allotment or a Health Savings Plan:

- Start a new allotment
- Change an existing allotment amount
- Stop an existing allotment

8. Select ***Add/Change/Cancel*** button next to Financial Allotment. The Financial Allotment page (**Figure 454** ) is displayed.

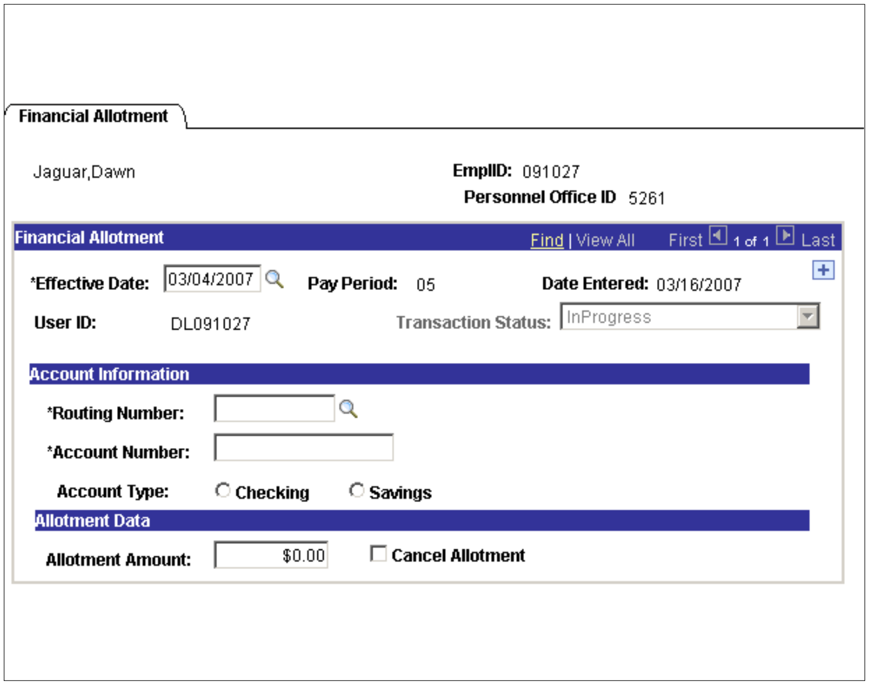


**Figure 454. Financial Allotment page**

9. Complete the fields as follows:

**Effective Date**

This field is populated with the beginning date of the current pay period. This field can be changed. Select data by clicking on the search icon.

**User ID**

This field is populated when the employee signs on to Employee Self Service.

**Transaction Status**

This field defaults to `In Progress` and reflects the status of the transaction. The transaction status will change when the transaction is saved, in SINQ, or resent to NFC.

***Routing Number**

Enter the routing number of the bank or select data by clicking on the search icon.

***Account Number**

Enter the account number of the direct deposit.

**Account Type/Checking**

Check this box if the account is a checking account

**Account Type/Savings**

Check this box if the account is a savings account.

**Allotment Amount**

Enter the amount of the financial allotment.

**Cancel Allotment**

Check this box if the allotment should be canceled.

**10.** Click **Save**.

## *Health Benefits*

Any Federal Health Benefits (FEHB) Change Request entered during Open Season will be effective Pay Period 01. If you meet the criteria for a ”qualifying life event” and wish to have your FEHB change effective on a different date, please see your servicing personnel office. The major ”Qualifying Life Events” (QLEs) that permit enrollment or change in enrollment outside of open season are:

- A change in family status:
  - Marriage
  - Birth or adoption of a child
  - Acquisition of a foster child
  - Legal separation
  - Divorce
  - Death of a spouse or dependent
  - Change in employment status:
    - Reemployed after a break in service of more than 3 days
    - Return to pay status after your coverage terminated during leave without pay status or because you were in leave without pay status for more than 365 days
    - Pay increases enough for premiums to be withheld
    - Restored to a civilian position after serving in the uniformed services
    - Change from a temporary appointment to an appointment that entitles you to a Government contribution
    - Change to or from part−time career employment
  - Employee or a family member lose FEHB or other coverage:
    - Under another FEHB enrollment because the covering enrollment was terminated, canceled, or changed to self only

- Under another federally−sponsored health benefits program
- Under Medicaid or similar State−sponsored program for the needy because your membership terminates in the employee organization sponsoring the FEHB plan
- Under a non−Federal health plan

- When one of these events occur, the employee may:
    - Enroll
    - Change enrollment from self only to self and family
    - Change enrollment to self only
    - Cancel enrollment

**Note**: A change to self only may be made only if the QLE causes the enrollee to be the last eligible family member under the FEHB enrollment. A cancellation may be made only if the enrollee can show that as a result of the QLE, he or she and all eligible family members now have other health insurance.

**11.** Select the ***Add/Change/Cancel*** button Health Benefits. The Health Benefits Elections page (**Figure 455** ) is displayed.

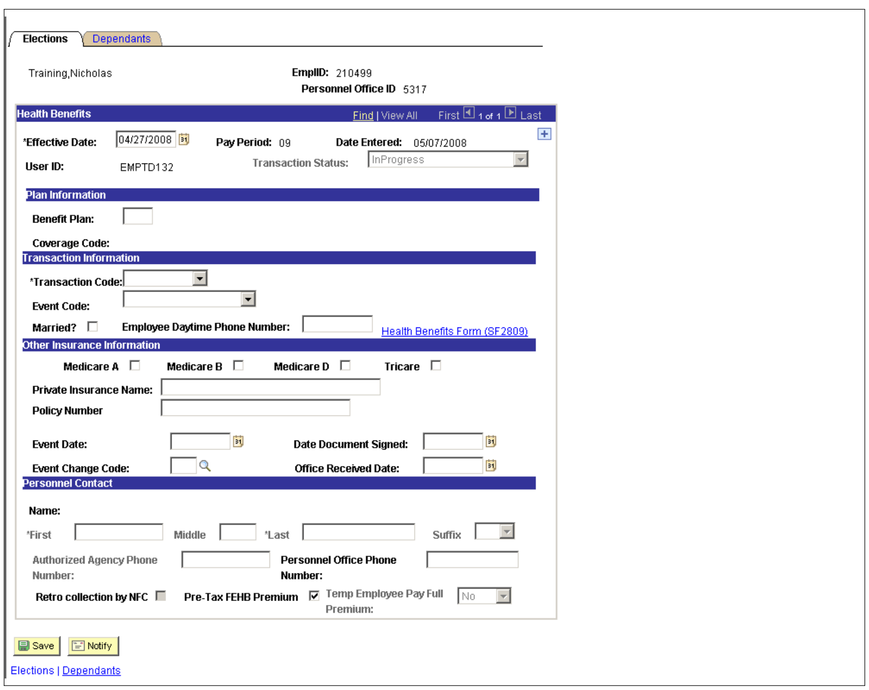


**Figure 455. Health Benefits Elections page**

**12.** Complete the fields as follows:

**Effective Date**

This field is populated with the beginning date of the current pay period. This field can be changed. Select data by clicking on the search icon.

**User ID**

This field is populated when the employee signs on to Employee Self Service.

**Transaction Status**

This field defaults to `In Progress` and reflects the status of the transaction. The transaction status will change when the transaction is saved, in SINQ, or resent to NFC.

**Benefit Plan**

Enter the health benefit plan.

**Transaction Code**

Enter the applicable information or select data from the drop-down list. The valid values are **`Add`**, **`Change`**, and **`Delete`**.

**Event Code**

Enter the applicable data or select data from the drop-down list. the valid values are:

**Married?**

Check this box if the applicant is married.

**Employee Daytime Phone Number**

Enter the phone number of the applicant.

**Medicare A**

Check this box if applicable.

**Medicare B**

Check this box if applicable.

**Medicare D**

Check this box if applicable.

**Tricare**

Check this box if applicable.

**Private Insurance Name**

Enter the private insurance name if the applicant has additional insurance.

**Policy Number**

Enter the policy number if the applicant had additional insurance.

**Event Date**

Enter the event date or select a date from the calendar icon.

**Date Document Signed**

Enter the date the insurance document was signed or select a date from the calendar icon.

**Office Received Date**

Enter the date the office received the document or select a date from the calendar icon.

**Event Change Code**

Enter the event change code or select data by clicking the search icon.

***First**

Enter the first name of the personnel contact.

**Middle**

Enter the middle name of the personnel contact if applicable.

***Last**

Enter the last name of the personnel contact.

**Authorized Agency Phone Number**

Enter the phone number of the personnel contact's agency.

**Personnel Office Phone Number**

Enter the phone number of the personnel office for the personnel contact.

**Retro Collection By NFC**

Check this box if applicable.

**Pre-Tax Premium**

This box is checked. Uncheck if the pre-tax premium is no.

**Temp Employee Pay full Premium**

This field defaults to **No**. Change by selecting data from the drop-down list.

**Personnel Office Phone Number**

Enter the phone number of the personnel office for the personnel contact.

13. Click ***Health Benefits Form (SF2809)*** link to complete the Health Benefits form for submission.

14. Click **Save**.

15. Click the ***Dependents*** link at the bottom of the page. The Dependents page (**Figure 456**) is displayed.

    **OR**

    Click the ***Dependents*** tab at the top of the page. The Dependents page (**Figure 456**) is displayed.

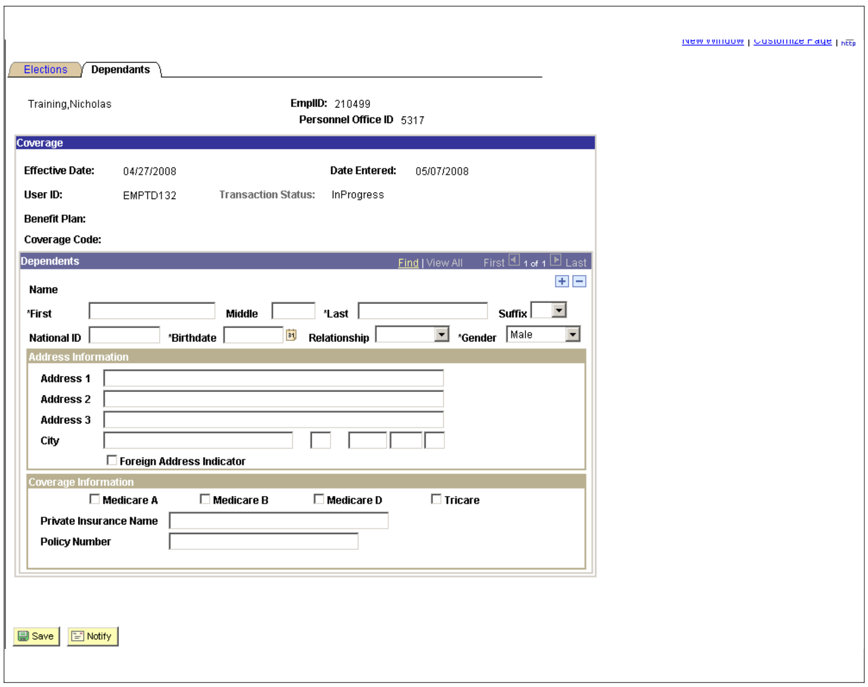


**Figure 456. Health Benefits Dependents page**

16. Complete the fields as follows:

**Effective Date**

This field is populated with the beginning date of the current pay period. This field can be changed. Select data by clicking on the search icon.

**User ID**

This field is populated when the employee signs on to Employee Self Service.

**Benefit Plan**

The health benefit plan is populated from the elections page.

**Transaction Status**

The transaction status is based on the status of the transaction. When the transaction is saved, the status will change.

***First**

Enter the first name of the personnel contact.

**Middle**

Enter the middle name of the personnel contact if applicable.

***Last**

Enter the last name of the personnel contact.

**Suffix**

Enter the suffix if applicable or select data from the drop-down list. The valid values are:

***Birthdate**

Enter the birthdate of the dependent or select a date from the drop-down list.

**Relationship**

Enter the relationship between the applicant and the dependent or select data from the drop-down list. The valid values are:

***Gender**

Enter the gender of the dependent or select data from the drop-down list. The valid values are:

**Address 1**

Enter the first line of the dependent’s address.

**Address 2**

Enter the second line of the dependent’s address if applicable.

**Address 3**

Enter the third line of the dependent’s address if applicable.

**City/State/ Postal Code**

Enter the city, state, and zip code of the address.

**Foreign Address Indicator**

Check this box if the address is in a foreign country.

**Medicare A**

Check this box if applicable.

**Medicare B**

Check this box if applicable.

**Medicare D**

Check this box if applicable.

**Tricare**

Check this box if applicable.

**Private Insurance Name**

Enter the private insurance name if the applicant has additional insurance.

**Policy Number**

Enter the policy number if the applicant had additional insurance.

17. Click the **+** to add another dependent. If more than two, click the **+** for each additional dependent.
18. Click **Save**.
19. Click the ***Elections*** link at the bottom of the page. The Elections page (**Figure 455** ) is displayed.

## *Savings Bonds*

Savings bonds documents are used to enter U.S. Series EE and Series I Savings Bonds data for deductions through the Payroll Savings Plan. Bond data is used for preparation of semi-annual bond reports that provides statistics pertaining to bond deductions. The bond account is reflected on the employee’s AD−334, Statement of Earnings and Leave. Savings bonds documents are used to add new bonds, update bond data, and cancel existing bonds.

This section will show how to enter data for an employee who wants to purchase U. S. Series EE and Series I savings bonds through voluntary participation in the Payroll Savings Plan.

Before beginning, the following information is needed:

- Form SB−2152, Authorization for Purchase and Request for Change − United States Savings Bonds, and/or Form SB−2253, Authorization for Purchase and Request for Change − United States Inflation−Indexed Savings Bonds

This section contains the following topics:



## *Savings Bond: Overview*

Employees may purchase a maximum of 9 allotments for U.S. Series EE and Series I savings bonds combined through voluntary participation in the Payroll Savings Plan. The Payroll Savings Plan is an automatic system for installment purchases of Series EE and Series I Savings Bonds through regular allotments (authorizations) set aside each pay period. Employees may elect to enroll in the Payroll Savings Plan at any time.

The National Finance Center electronically transmits savings bond information to the Federal Reserve Bank (FRB) on the official Thursday payday. FRB prints and distributes savings bonds the following week. Bond owners should receive their bonds within 10 working days after the official payday in which the savings bond was purchased.

## *Bond Account*

The allotment amount specified by the employee is established when the initial bond is entered. This amount is deducted from the employee's salary each pay period. The allotments are accrued in the employee's bond account established in the PPS database until the full purchase price of the bond has been accumulated. At that time, the bond is issued and mailed to the designated bond owner. This cycle continues until the employee cancels the allotment or terminates employment. Upon cancellation of the allotment or termination of employment, the employee's savings bond account is closed in the database.

If the accumulated amount exceeds the purchase price of the bond, the balance is carried forward in the employee's bond account and applied toward the next bond purchase. If any portion of the amount cannot be equally applied toward the purchase of another bond, it is refunded.

## *Bond Purchase Price*

The purchase price of the Series EE bond is one-half of its face value as shown on the bond card. The purchase price of Series I is 100 percent of the face value.

## Bond Inscriptions

The savings bond inscription is the owner and/or co−owner/beneficiary information printed on the savings bond. The employee dictates this information. For each savings bond allotment, the savings bond may be issued to a single owner inscription or with a rotating inscription.

This section includes the following topics:



### Single Owner Inscription Option

The single owner inscription option permits the employee to designate one savings bond owner and zero or one co−owner/beneficiary for a savings bond allotment. Each savings bond purchased from one allotment will be issued to the designated bond owner. The owner and co-owner or beneficiary inscription will remain constant until the employee changes the inscription, cancels that savings bond allotment, or terminates employment.

The employee may:

- Designate an adult or minor as the owner and/or co-owner/beneficiary.
- Designate a fiduciary or an organization, private or public, as the owner. If the institution is an employer, the employer identification number assigned to the Internal Revenue Service must be entered on the bond card in lieu of the owner's social security number (SSNO).

### Rotating Inscription Option

The rotating inscription option allows the employee to have the savings bond resulting from one allotment issued to different designated owners and/or different co-owners or beneficiaries on a recurring, sequential cycle. The employee may designate one to nine owners and zero to nine co-owners and/or beneficiaries. The co-owners or beneficiaries designations may be: zero to nine co-owners, zero to nine beneficiaries, or a combination of co-owners and beneficiaries totaling a maximum of nine (i.e., five co-owners and four beneficiaries, three co-owners and six beneficiaries, etc.). Many issuing combinations are possible through the rotating inscription option.

Each employee may have a maximum of nine separate savings bond accounts for Series EE and Series I combined. Each savings bond account has two subdivisions (a savings bond owner section and a co-owner/beneficiary section).

For a new savings bond allotment under the rotating inscription option, as many as nine bond cards may be required. Even though multiple bond cards are required to transact the rotating inscription option, it is only assigned one authorization number.

The bond owner section may designate a total of nine separate savings bond owners. Savings bonds are issued to a designated owner in a rotating sequential order. The owner rotation is accomplished independently with the savings bond account.

The co-owner/beneficiary section may have a total of nine co-owners or nine beneficiaries, or a combination of co−owners and beneficiaries totaling a maximum of nine. The co-owner/beneficiary inscription is rotated with each savings bond issued and is also accomplished independently with the bond account.

Naming multiple savings bond owners and/or multiple co-owners/beneficiaries causes both the savings bond owners and co−owner/beneficiary inscriptions to change with each savings bond issued. Because the savings bond owner and co-owner/beneficiary designation both rotate independently with the employee’s savings bond account, the employee can determine the issuing order and sequence by the procedure illustrated below.

1. List the savings bond owners in order of designation (savings bond owner Number 1, 2, etc.).

2. List the co-owners/beneficiaries in a second column in order of designation, if applicable.

3. List the savings bond to be issued and the inscription to be reflected on that savings bond as the owner and co-owner/beneficiary designation are rotated. Remember the savings bond owner designation rotates independently as does the co-owner/beneficiary designation. (The table below depicts an example of a rotating inscription with six bond owners and four co-owners/beneficiaries.)

| Savings Bond Owner | Co−owner/Beneficiary |
|---|---|
| 1−John Snow | 1−Karen Rain (co−owner) |
| 2−Susan Snow | 2−Betty Rain (beneficiary) |
| 3−Billy Snow | 3−Sharon Rain (beneficiary) |
| 4−Sally Snow | 4−Randy Rain (co−owner) |
| 5−Mary Snow | |
| 6−Bob Snow | |

**Inscription Reflected On Savings Bond When Issued**

| Savings Bond Issued | Savings Bond Owner | Co−owner/Beneficiary |
|---|---|---|
| **1** | 1−John Snow | 1−Karen Rain |
| **2** | 2−Susan Snow | 2−Betty Rain |
| **3** | 3−Bill Snow | 3−Sharon Rain |
| **4** | 4−Sally Snow | 4−Randy Rain |
| **5** | 5−Mary Snow | 1−Karen Rain |
| **6** | 6−Bob Snow | 2−Betty Rain |
| **7** | 1−John Snow | 3−Sharon Rain |
| **8** | 2−Susan Snow | 4−Randy Rain |
| **9** | 3−Bill Snow | 1−Karen Rain |
| **10** | 4−Sally Snow | 2−Betty Rain |
| **11** | 5−Mary Snow | 3−Sharon Rain |
| **12** | 6−Bob Snow | 4−Randy Rain |

## *Bond Authorization Number*

An authorization number is assigned to each savings bond allotment. The authorization number identifies the employee’s savings bond account in the database. The assigned authorization number will remain with that particular savings bond allotment until the savings bond allotment is canceled. All future transactions affecting a specific savings bond allotment must show the original assigned authorization number.

Each employee may establish a maximum of nine separate savings bond authorizations for Series EE and Series I in the database. Individually, the savings bond allotment may be for any amount equal to or greater than $3.75. For each authorization, the resultant savings bond may be issued to a single owner or issued with a rotating inscription.

The authorization number assigned to each savings bond allotment plays an important role when the employee wishes to enroll in the Payroll Savings Plan for savings bonds, change any information for the savings bond allotment, or wishes to cancel the savings bond allotment. Verify the authorization number in IRIS Program IR108 when processing a savings bond allotment for an employee.

This includes new allotments to ensure that the employee has no savings bond allotments established in the database and that Authorization Number 1 can be used. If the new savings bond allotment is for an employee who has established savings bond allotments in the database, the next sequential number should be used for the authorization number.

### *Bond Transfer And Cancellation*

An employee who transfers from one department to another department is treated as an accession (this includes departments serviced by the USDA PPS). If the new employee wishes to continue and/or start savings bond allotment(s), enter the bond data from the bond card.

Once established, a savings bond authorization continues until the employee cancels the allotment or terminates employment with the department: Intradepartmental movement (changes in personnel office, agency, duty, station, etc.) does not effect the savings bond allotment(s). The employee's savings bond record in the database is automatically updated when the payroll/personnel changes are processed. No action is required at the time of the intradepartmental reassignment unless the reassignment results in a change of address of a designated bond owner. In such cases, enter the data to change the bond inscription(s).

If an employee is transferring to an agency outside the department, retiring, or resigning, the savings bond allotment(s) are automatically canceled. Any balance remaining in the employee's bond account will be included in the final salary payment. If the employee transfers and wishes to continue voluntary participation in the Payroll Savings Plan, a bond card must be completed and submitted to the gaining organization (this includes departments serviced by the USDA PPS).

In the event of death, the balance remaining in the savings bond account is included in the balance paid to the survivors or an estate.

### *Bond Non−Receipt*

If a savings bond has not been received within 30 days after the expected delivery date, the employee should contact the agency personnel office. If the bond has not been returned to the agency personnel office, the agency personnel office should request the savings bond serial number from NFC through DOTSE. The serial numbers are needed to complete the Department of the Treasury's claim form.

If the savings bond has not been received between 31 and 120 days after the expected delivery date, Form PDF 3062, Claim for Relief on Account of Loss, Theft, or Destruction of

United States Savings Bonds After Valid Issue But Prior To Receipt By Owner, Co−owner, Or Beneficiary, must be completed. This form can be obtained from the local servicing Federal Reserve Bank. The completed form should be sent to:

Federal Reserve Bank
Pittsburgh Branch
P.O. Box 299
Pittsburgh, PA 15219

**OR**

Federal Express Form PDF 3062 to the following address:

Federal Reserve Bank
Pittsburgh Branch
717 Grant Street
Pittsburgh, PA 15230

Claims routed to the Federal Reserve Bank, Pittsburgh Branch with issue dates of more than 120 days old are returned to the agency due to these claims being handled by the Bureau of the Public Debt. The agency should assist the employee in completing Form PDF 3062−4, Claims For Relief On Account Of The Non−receipt Of United States Savings Bonds. This form can be obtained from the local servicing Federal Reserve Bank. The completed form should be sent to:

Bureau of the Public Debt
Parkersburg, WV 26106−1328

If the original savings bond is received in the interim before relief is granted, the claimant should promptly notify Treasury in writing at the address mentioned above. If the application can be canceled in time, no replacement savings bond will be issued.

If the original savings bond is received after the replacement savings bond, the original savings bond should be forwarded promptly to the Department of the Treasury with a letter explaining the reason for the return.

## *Destroyed, Lost, Stolen, Mutilated, Or Defaced Savings Bonds*

A request for a replacement savings bond must be prepared only if the savings bond was received by the owner or representative and was subsequently destroyed, lost, stolen, mutilated, or defaced.

To initiate the replacement of a savings bond, the owner must prepare Form PDF 1048, Application For Relief On Account Of Loss, Theft, or Destruction Of United States Savings And Retirement Securities. This form can be obtained from the local servicing Federal Reserve Bank. The employee should follow the instructions attached to the form and submit the form and the defaced savings bond and all available fragments of a mutilated savings bond, in any form whatsoever, to the following address:

Bureau of the Public Debt
Parkersburg, WV 26106−1328

## *Undeliverable/Returned Savings Bonds*

All undeliverable savings bonds are returned to the Department of the Treasury. The Department of the Treasury returns the original savings bond to NFC for handling.

Upon receipt of undeliverable savings bonds, NFC will determine which agency personnel office services the employee. The original savings bond is then forwarded to the employee’s agency personnel office with a memorandum that provides instructions for sending the savings bond to the employee and asking that the employee’s savings bond address be corrected. A bond card must be completed to change an address for savings bond allotments. An employee address document will not change an address for a savings bond allotment.

The agency personnel office should give the original savings bond to the employee, if possible. If the savings bond cannot be given to the employee (e.g., the employee is at another location, separated, etc.) the agency should make every effort to notify the employee of the undeliverable/returned bond so that arrangements can be made to deliver the bond to the employee.

Have the employee complete a bond card to correct the address and enter the address in the system. If a subsequent savings bond is issued before the inscription is changed, it is also returned to the Department of the Treasury and then to NFC. This procedure continues until the address is corrected; therefore, it is important to correct the employee’s address in the PPS as soon as possible.

If the agency personnel office is unable to contact the employee within 90 days after the savings bond issue date, forward the savings bond to the Bureau of the Public Debt, Parkersburg, WV 26106−1328, using Form PD 4581 ABC, Forwarding Item Transmittal − U.S. Savings Bonds/Notes − Retirement Plan Bonds − Individual Retirement Bonds. The Remarks block should be annotated with a description of the efforts made to deliver the bond (e.g., “Attempted to contact employee at last known address.”). This form can be obtained from the local servicing Federal Reserve Bank.

Forward a deceased employee’s bond to the co-owner or beneficiary, if any, and obtain a receipt. If the savings bond cannot be delivered within 30 days to a co-owner or beneficiary, or it is in a single ownership form, it should be returned to NFC with a statement indicating why the bond cannot be delivered. NFC will then forward this information to the Bureau of the Public Debt. A 90−day waiting period is not necessary in this case.

## *Bond Address Change*

Enter a change in inscription to change an address for a savings bond allotment.

**Note**: Processing an employee address document does not change an address for a savings bond allotment.

4. Select the ***Add/Change/Cancel*** button next to Savings Bonds. The Savings Bond Summary page (**Figure 457** ) is displayed.

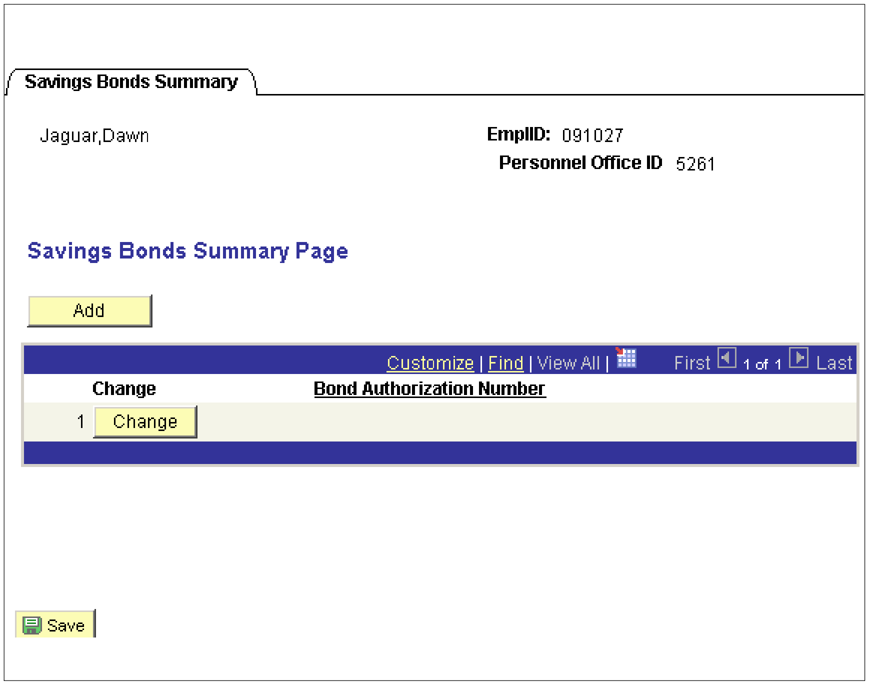


**Figure 457. Savings Bonds Summary page**

5. Click **Change**. The Bond Information page (**Figure 458**) is displayed.

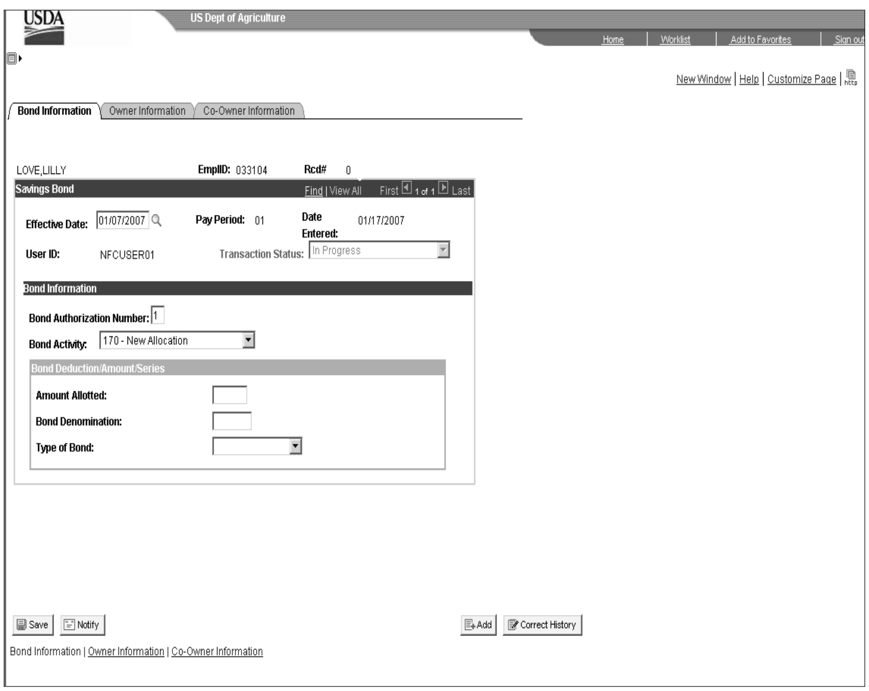


**Figure 458. Bond Information page**

6. Complete the fields as follows:

**Effective Date**

This field is populated with the beginning date of the current pay period. This field can be changed. Select data by clicking on the search icon.

**User ID**

This field is populated when the employee signs on to Employee Self Service.

**Transaction Status**

The transaction status is based on the status of the transaction. When the transaction is saved, the status will change.

**Bond Authorization Number**

Enter the bond authorization number (1−9).

**Bond Activity**

Enter the applicable data or select data from the drop-down list. The valid values are

**Amount Allocated**

Enter the amount allocated to purchase the bond.

**Bond Denomination**

Enter the denomination of the bond.

**Type Of Bond**

Enter the bond type or select data from the drop-down list. The valid values are:

**School**

Enter the applicable data or select data from the drop-down list.

7. Click **Save** to save the transaction.
8. Select the ***Owner Information*** tab to enter the owner new bond information. The Owner Information page (**Figure 459** )is displayed.

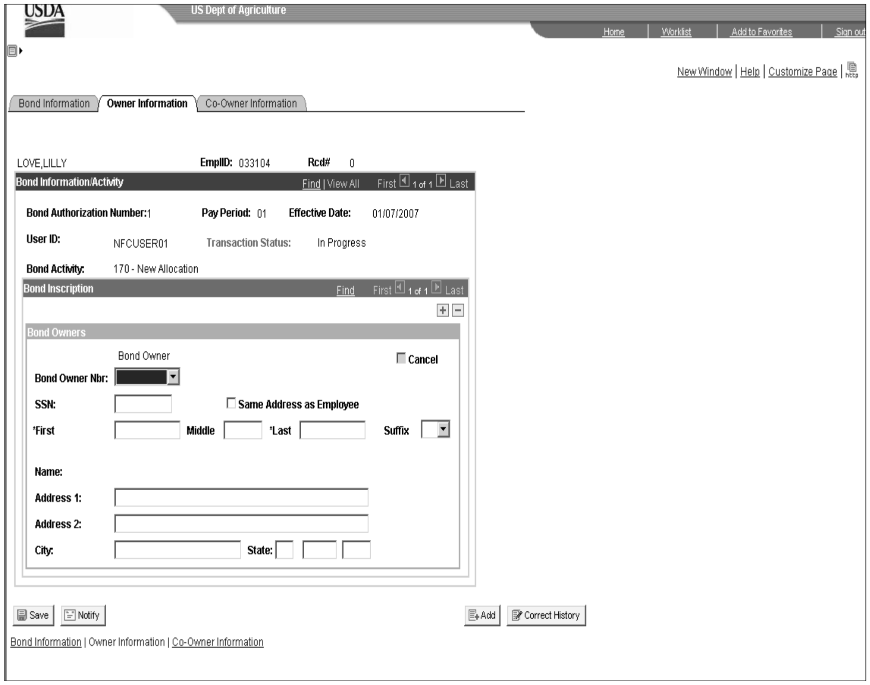

**Figure 459. Owner Information page**

9. Complete the fields as follows:

**Bond Owner Nbr**

Enter the bond owner number or select data from the drop-down list. The valid values are:

**Cancel**

Click this box to cancel the bond.

**SSN**

Enter the social security number of the bond owner.

**Same Address As Employee**

Check this box if the address of the bond owner is the same as the employee.

***First**

Enter the first name of the bond owner.

**Middle**

Enter the middle name of the bond owner if applicable.

***Last**

Enter the last name of the bond owner.

**Suffix**

Enter the suffix if applicable or select data from the drop-down list. The valid values are:

**Address 1**

Enter the first line of the bond owner address.

**Address 2**

Enter the second line of the bond owner address if applicable.

**Address 3**

Enter the third line of the bond owner address if applicable.

**City**

Enter the city for the address.

**State/Postal Code**

Enter the state and postal code for the bond owner’s address.

10. Click **Save** .
11. Click the ***Beneficiary Information*** link at the bottom of the page (**Figure 459**). The Bond Beneficiary Information page (**Figure 460** ) is displayed.

    **OR**

    Click the ***Beneficiary Information*** tab at the top of the page. The Bond Beneficiary Information page(**Figure 460** )is displayed.

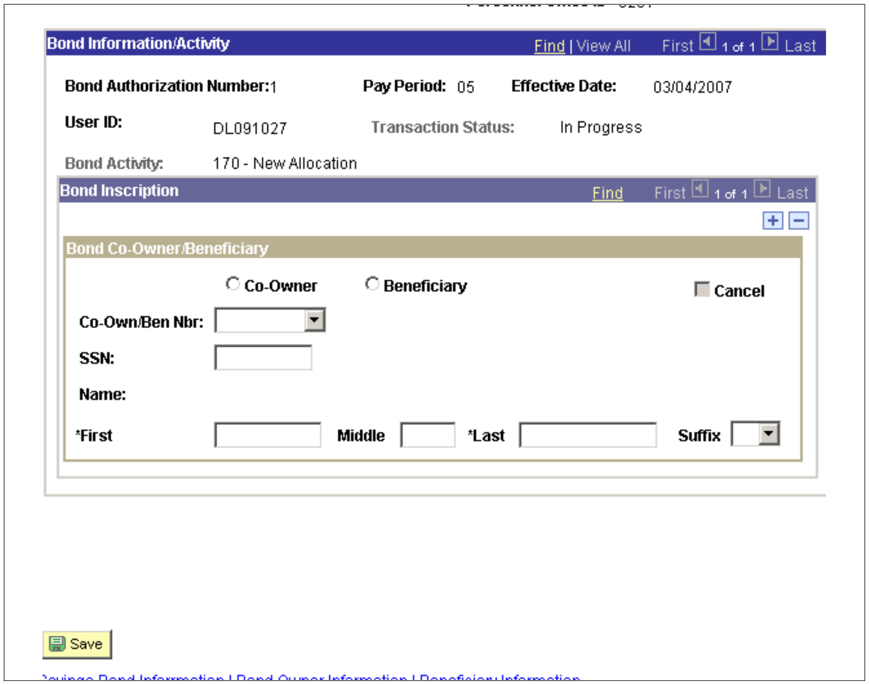


**Figure 460. Beneficiary Information page**

**12.** Complete the fields as follows:

**Co-Owner**

Check this box if the bond will have a co-owner.

**Beneficiary**

Check this box if the bond will have a beneficiary.

**Cancel**

Check this box if the co-owner or beneficiary should be canceled.

**Co-Owner Nbr**

Enter the co-owner number or select data from the drop-down list. The valid values are:

**SSN**

Enter the social security number of the co-owner or beneficiary.

***First**

Enter the first name of the co-owner or beneficiary.

**Middle**

Enter the middle name of the co-owner or beneficiary if applicable.

***Last**

Enter the last name of the co-owner or beneficiary.

**Suffix**

Enter the suffix for the co-owner or beneficiary or select data from the drop-down list. The valid values are:

13. Click **Save** .

### *State Tax*

For processing purposes, the tax year usually begins in Pay Period 25 and ends in Pay Period 24. All taxes withheld for those inclusive pay periods are reported on the IRS Form W−2, Wage and Tax Statement.

A new tax certificate may be processed at any time to change an employee's tax information. If the employee's duty station or residence changes and the new local tax location has an agreement with Treasury for mandatory withholding, a new tax certificate should be processed. All previously processed exemptions, additional withholdings, etc., will be removed and must be reprocessed, if applicable. If a new tax certificate is not processed, the PPS will begin withholdings at the highest taxable rate if the duty station has a mandatory tax withholding agreement

You may be exempt from withholding of state tax on the basis of limited earnings or other reasons determined by the state. If exemption is allowed by the state, type Only (ONL) in the Total Number Of Allowances field, to indicate the employee is exempt from withholding.

Some states do not provide state withholding exemption certificates for establishing an exemption status; others do not require the processing of state tax withholding data since the income tax formulas are based on a percentage of Federal income tax, Federal exemption status, or a percentage of annual wages. If the state tax withholding is based on the Federal withholding and a IRS Form W−4 is not processed, Federal and State Income Taxes will be automatically withheld at the rate of single with zero exemption until a IRS Form W−4 is entered for processing.

Unless otherwise indicated, state tax deductions for lump sum payments and cash awards are withheld based on the employee's state tax exemptions recorded in the database.

This section contains the following topics:



### *Dual State Tax Voluntary Withholding*

Dual state tax withholding allows employees to voluntarily elect to pay state tax in both their duty station and residence states. If state income tax is currently being withheld based on the duty station and a state tax form is entered to begin withholding for the residence state, the document will appear in suspense with an informational message indicating the document entered will result in dual state tax deductions. To release the document, type C in the Status Code field.

The Form AD−304, Request and Authorization for Allotments of Compensation for State Income Tax Purposes, serves as a certification that the employee is authorizing voluntary withholding from his/her pay and must accompany the appropriate state withholding exemption certificate. The Form AD−304 can also be used to record the voluntary state tax withholding data in cases where the state does not provide a form for the declaration of withholding.

If the Form AD−304 is used to record voluntary state tax data in lieu of a state tax certificate, the State Tax Withholding State Code, the Total Number of Allowances, and the Additional Amount (if applicable) must be indicated on the form when signed by the employee.

## *Cancellation Of Voluntary Withholding*

Voluntary state tax withholding will terminate if:

- The duty station state changes (the certificate of non−residence is now void)
- The state revokes its tax withholding law,
- An exemption from withholding certificate is processed (ONL in the Total Number Of Allowances field).
- A cancellation of voluntary withholding is processed (CAN in the Total Number Of Allowances field).

## *Certificate Of Non−Residence For State Tax*

States with reciprocal agreements have agreed that if taxes are withheld for the residence state, taxes will not be withheld for the duty station state. A certificate of non-residence allows an employee to declare non−residency for the duty station state to have taxes withheld for the residence state.

State laws and regulations should be checked to determine if reciprocal agreements are in place before processing a certificate of non−residence for an employee. In most cases, the employee must reside in one of several designated states to be exempt from the mandatory withholding provisions of their duty station state.

If your duty station changes, the certificate of non−residence in effect at that time will become void, and a new certificate is required for the new duty station state (if applicable).

Each certificate of non−residence is to be completed following the instructions on the individual form. Enter the duty station state tax document to waive liability before entering the state tax document for the residence state. Type WAV (waiver) in the Total Number of Allowances Claimed field.

### *Voluntary Withholding*

Several taxing entities that do not have agreements with the Secretary of the Treasury have been established in the database for voluntary tax withholding. Tax data must be processed for these entities for taxes to be withheld. Voluntary withholding is based on residence. An employee may voluntarily elect to pay tax based on residence if:

- The residence city, county, or state is established in TMGT.
- The mandatory duty station tax is waived (if allowed).
- The residence tax locality on the tax form agrees with the residence tax locality of the duty station.

### *Additional Withholding*

You may authorize an amount to be withheld from your salary each pay period in addition to the amount automatically withheld in accordance with the income tax formula. Most exemption certificates allow for additional withholding. This dollar amount is entered in the Additional Amount field of the applicable income tax certificate page.

This section shows the process of establishing or changing an employee's state income tax withholding code or an additional withholding amount; establishing or canceling a certificate of non−residence and claiming total exemptions from withholding, if permitted by the state.

Before beginning, the following information is needed: (refer to the State Tax withholding certificated completed by the employee).

- State Tax withholding code
- Total number of Allowances
- Additional withholding amount FOR CALIFORNIA, ILLINOIS, MICHIGAN, VIRGINIA AND PUERTO RICO ONLY)
- Additional Exemptions Claimed FOR Puerto Rico ONLY
- Personal Exemptions Claimed
- Public or Private Employee

**14.** Select the ***Add/Change/Cancel*** button next to State Tax. The State Tax tab page (**Figure 461** ) is displayed.

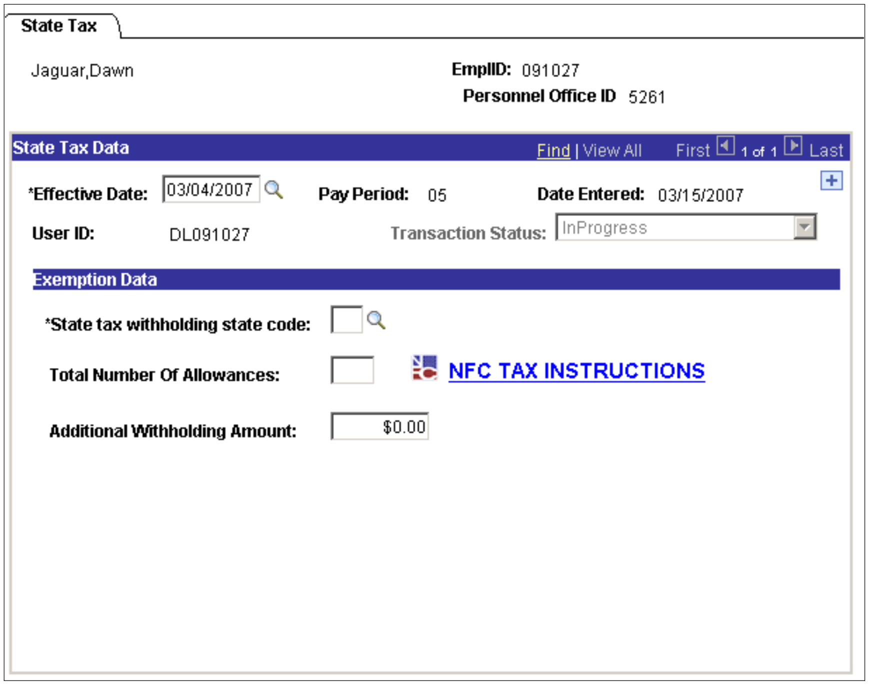


**Figure 461. State Tax tab page**

15. Complete the fields as follows:

**Effective Date**

This field is automatically populated with the beginning date of the current pay period. Change the date if applicable.

**Date Entered**

This date is populated.

**User ID**

This field is populated when the employee signs on to Employee Self Service.

**Transaction Status**

This field defaults to `In Progress` and reflects the status of the transaction. The transaction status will change when the transaction is saved, in SINQ, or resent to NFC.

***State Tax Withholding State Code**

Enter the state tax withholding code or select data by clicking on the search icon.

**Total Number Of Allowances**

Enter the applicable number.

**Additional Withholding Amount**

Enter the additional amount to be withheld.

16. Click **Save** .

### *Thrift Savings Plan*

The Thrift Savings Plan transaction allows you to specify a percentage of pay (up to 99%) or whole dollar amount to contribute to your TSP each pay period. Your total contributions for the year may not exceed the Internal Revenue Service (IRS) limit. When changing your TSP contribution amounts, please enter either a percentage or whole dollar amount. Do no enter both.

FERS employees should refer to the TSP Fact Sheet **`Annual Limit on Elective Deferrals`** dated 11/2/05 available on ***www.tsp.gov*** to ensure your contribution will receive the maximum agency matching.

Before beginning, the following information is needed: (refer to Form TSP−1)

- The type of action (enrolling, changing, stopping contributions)
- The percent of Contribution OR the amount of Contribution.
- Whether action is being processed during an Open Season.

17. Select ***Add/Change/Cancel*** button next to Thrift Savings Plan. The Thrift Savings Plan page (**Figure 462** ) is displayed.

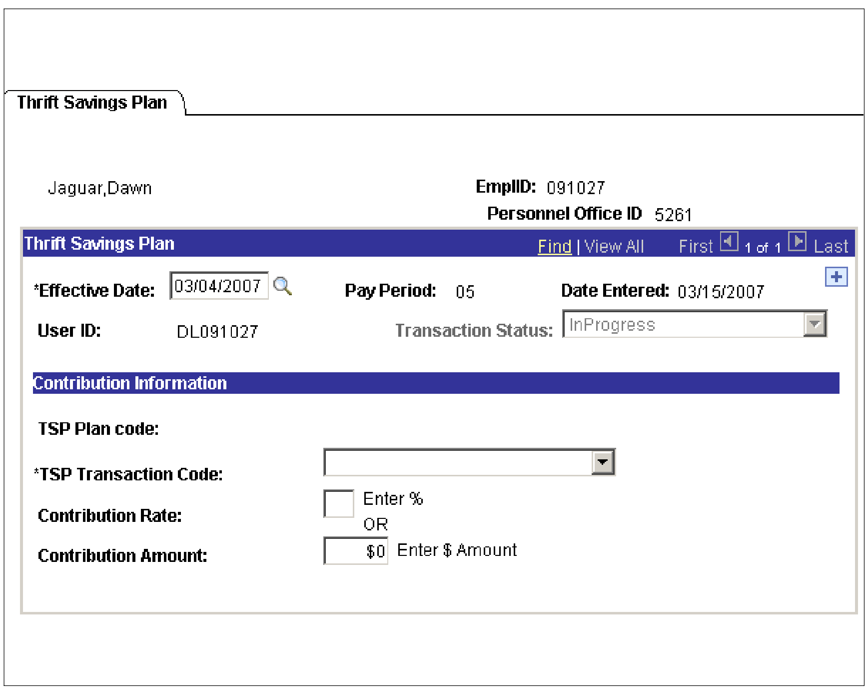


**Figure 462. Thrift Savings Plan page**

18. Complete the fields as follows:

**Effective Date**

This field is automatically populated with the beginning date of the current pay period. Change the date if applicable.

**Date Entered**

This date is populated.

**User ID**

This field is populated when the employee signs on to Employee Self Service.

**Transaction Status**

This field defaults to **`In Progress`** and reflects the status of the transaction. The transaction status will change when the transaction is saved, in SINQ, or resent to NFC.

***TSP Transaction Code**

Enter the TSP transaction code or select data from the drop-down list. The valid values are:

**Contribution Rate**

Enter the contribution percent.

**OR**

**Contribution Amount**

Enter the contribution amount ($XX.XX)

19. Click **Save** .

### *TSP Catchup*

Public Law 107−304 permits eligible TSP participants age 50 or older to make tax-deferred ”catch-up” contributions from basic pay to their TSP accounts. The catch-up contributions are a supplement to the participant’s regular TSP contributions and do not count against either the statutory contribution percentage limitations or the IRS deferral limit.

You must meet the following criteria in order to make catch−up contributions:

- In pay status.
- At least 50 years or older in the year that the catch−up contributions are made.
- Not be in the 6-month non-contribution period following a financial hardship in−service withdrawal.

- Contributing the maximum amount allowed according to TSP/IRS regulations.

There are no matching government contributions when making catch-up contributions. Allocations for the catch−up contributions will be made in accordance with the employee's current allocations.

Before beginning, the following information is needed: (refer to Form TSP−1−C)

- Type of action (enrolling, changing, stopping contributions)
- Amount of Contribution

**20.** Select the ***Add/Change/Cancel*** button next to TSP Catchup. The TSP Catchup page (**Figure 463** ) is displayed.

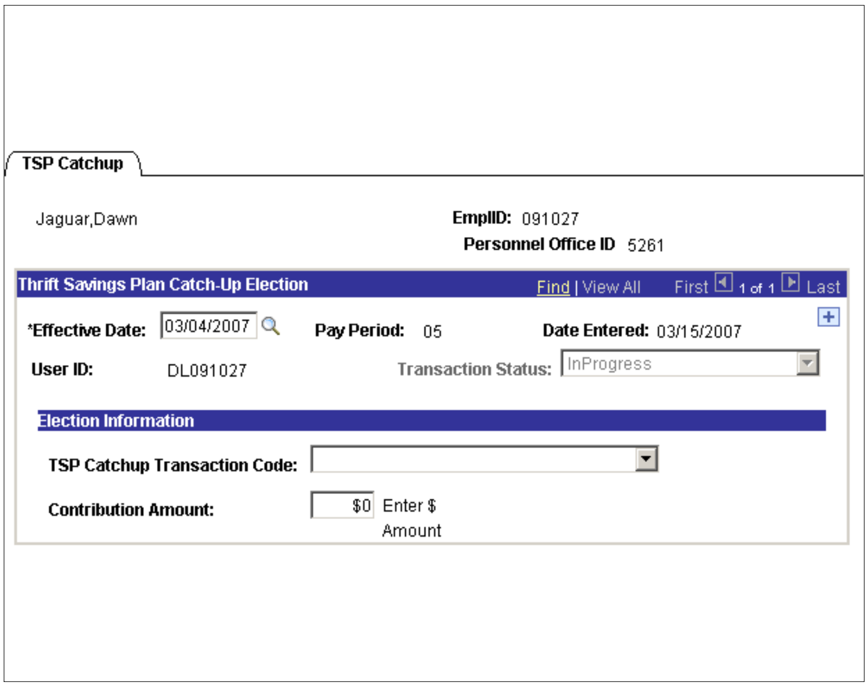


**Figure 463. TSP Catchup page**

**21.** Complete the fields as follows:

**Effective Date**

This field is automatically populated with the beginning date of the current pay period. Change the date if applicable.

**Date Entered**

This date is populated.

**User ID**

This field is populated when the employee signs on to Employee Self Service.

**Transaction Status**

This field defaults to `In Progress` and reflects the status of the transaction. The transaction status will change when the transaction is saved, in SINQ, or resent to NFC.

**TSP Catchup Transaction Code**

Enter the TSP transaction code or select data from the drop-down list. The valid values are:

**Contribution Amount**

Enter the contribution amount ($XX.XX)

22. Click **Save**.

## Awards Request

### To view and update an Award:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Awards Request*** component. The Find An Existing Value tab - GAO Employee Award Request page (**Figure 466** ) is displayed.

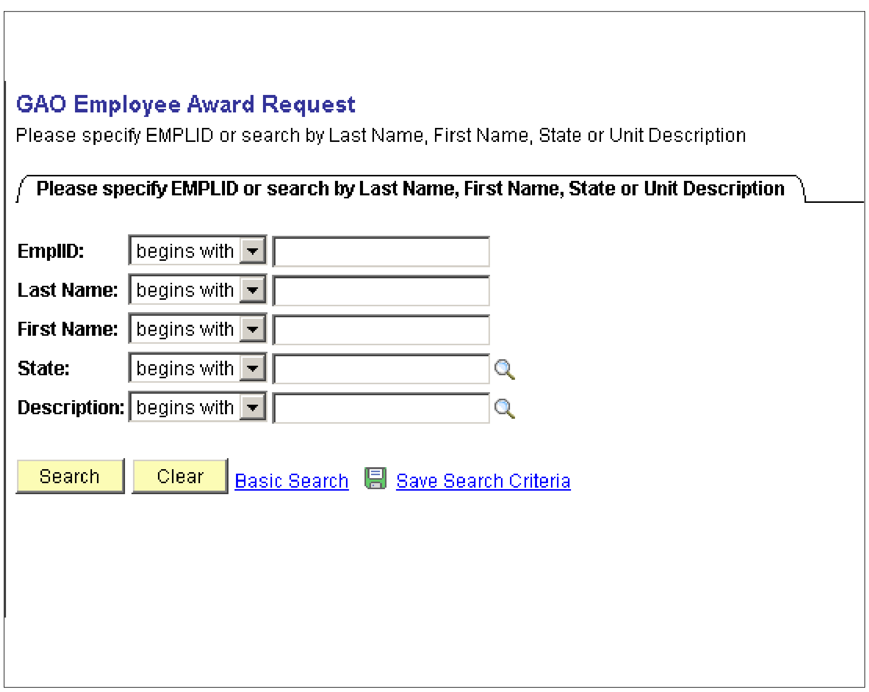


**Figure 464. GAO Award Request page**

4. Complete the fields as follows:

**EmplID**

Enter the EmplID.

**Last Name**

Enter the last name.

**First Name**

Enter the first name.

**State**

Enter the state.

**Description**

Enter the description.

5. Click **Search**. The Award Request For (the selected employee) page (**Figure 465**) is displayed.

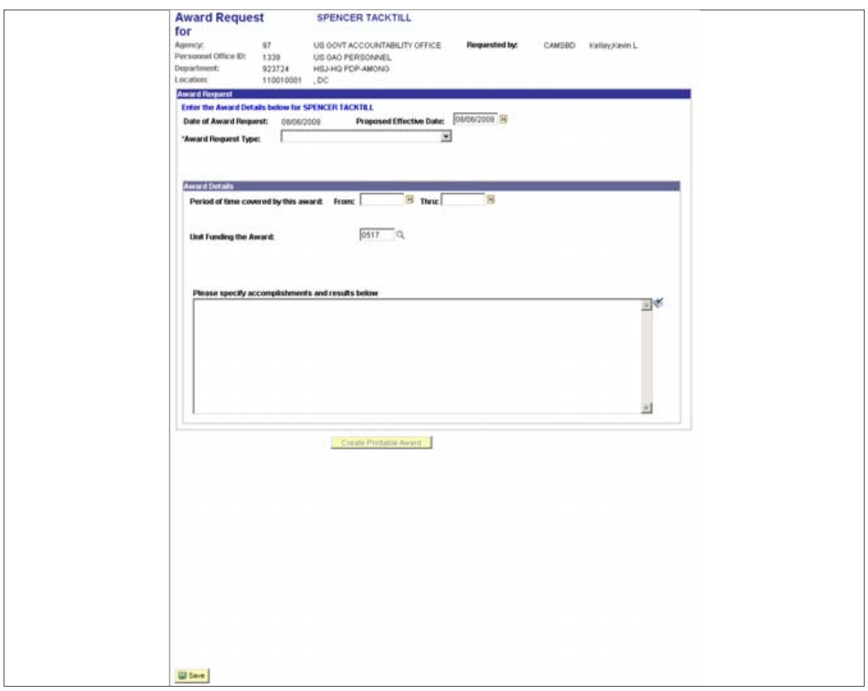

**Figure 465. Award Request For (the selected employee) page**

6. Complete the fields as follows:

**Agency**

This field is the agency of the employee and is populated from the ESS logon.

**Personnel Office ID**

This field is the POI of the employee and is populated based on the employee.

**Department**

This field is the Department of the employee/POI and is populated.

**Requested By**

This field is populated from the User ID.

**Request Approver**

This field is the person approving the award and is populated from the ESS workflow.

**Enter The Award Details Below For**

Enter the the award justification.

**Date Of Award Request**

This date is the current date or the date of the award request.

***Award Request Type**

Enter the award type or select data from the drop-down list. The valid values are:

**Request Status**

Enter the request status or select data by clicking the search icon. The valid values are:

**Period Of Time Covered By This Award/From**

Enter the date the award period started or select a date from the calendar icon.

**Period Of Time Covered By This Award/Thru**

Enter the date the award period ended or select a date from the calendar icon.

**Dollar Amount Being Requested**

Enter the amount of the award.

**Please Specify Accomplishments And Results Below**

Enter the specific accomplishments to justify the award.

7. Click **Save** to save the data.

8. Click **Create Printable Award** to print the actual award.

## Awards

This process allows an to view and update an award.

### To view and update an Award:

1. Select the ***Employee Self Service*** menu group.

2. Select the ***Tasks*** menu.

3. Select the ***Awards*** component. The Find An Existing Value tab - Awards page (**Figure 466** ) is displayed.

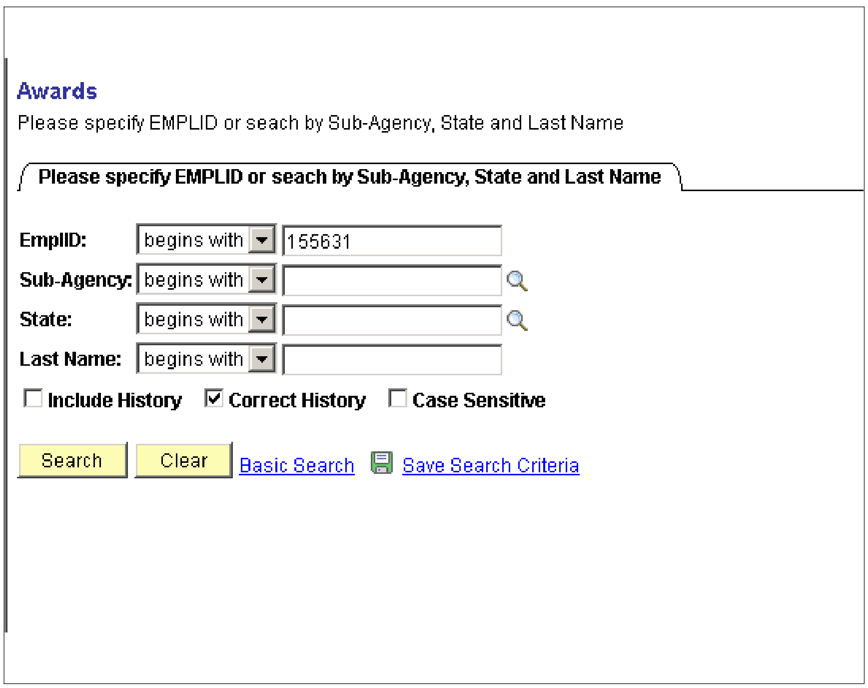


**Figure 466. Find An Existing Value tab - Award Request page**

4. Complete the fields as follows:

5. Complete the fields as follows:

**EmplID**

Enter the EmplID.

**Last Name**

Enter the last name.

**First Name**

Enter the first name.

**State**

Enter the state.

**Description**

Enter the description.

6. Click **Search**. The Award Request For (the selected employee) page (**Figure 465**) is displayed.

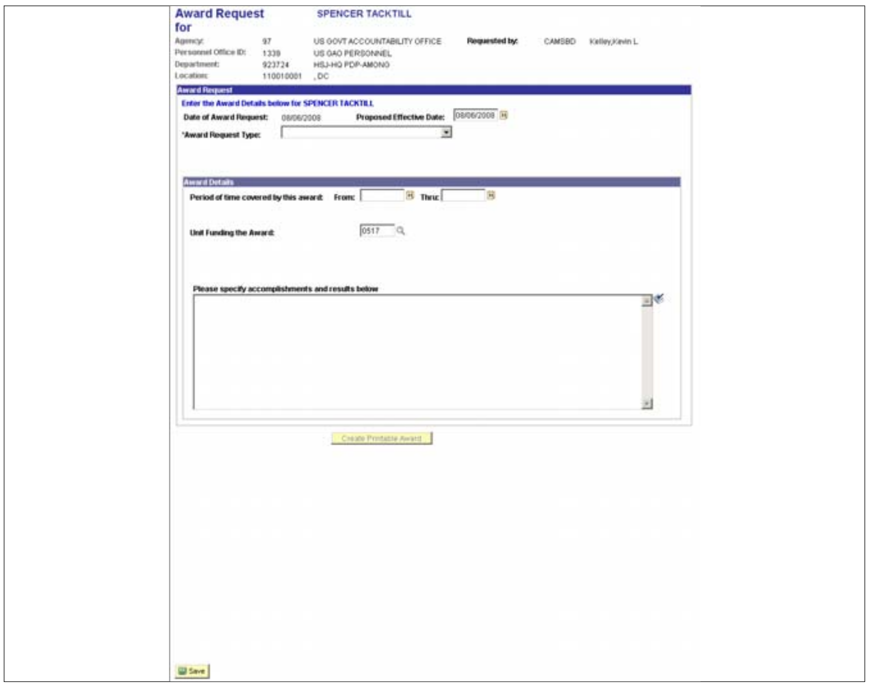


**Figure 467. Award Request For (the selected employee) page**

**Agency**

This field is the agency of the employee and is populated from the ESS logon.

**Personnel Office ID**

This field is the POI of the employee and is populated based on the employee.

**Department**

This field is the Department of the employee/POI and is populated.

**Requested By**

This field is populated from the User ID.

**Request Approver**

This field is the person approving the award and is populated from the ESS workflow.

**Enter The Award Details Below For**

Enter the the award justification.

**Date Of Award Request**

This date is the current date or the date of the award request.

***Award Request Type**

Enter the award type or select data from the drop-down list. The valid values are:

**Request Status**

Enter the request status or select data by clicking the search icon. The valid values are:

**Period Of Time Covered By This Award/From**

Enter the date the award period started or select a date from the calendar icon.

**Period Of Time Covered By This Award/Thru**

Enter the date the award period ended or select a date from the calendar icon.

**Dollar Amount Being Requested**

Enter the amount of the award.

**Please Specify Accomplishments And Results Below**

Enter the specific accomplishments to justify the award.

7. Click **Save** to save the data.
8. Click **Create Printable Award** to print the actual award.

## Performance

The Employee Self Service (ESS) Performance option allows the employee to view and edit their performance plan documents. The employee can view the performance plan start and end dates and the performance plan date, rating scale and their employment information for the following year. The Supervisor's latest actions can also be viewed by the employee. The employee can view the Elements and Standards tab and cannot edit the plan it is is finalized by their manager.

This section contains the following topics:



### *Existing Plan*

**To view or modify an existing Performance Plan:**

1. Select the ***Employee Self Service*** menu group.

2. Select the ***Tasks*** menu.

3. Select the ***Performance*** component. The Performance Request page (**Figure 468** ) is displayed.

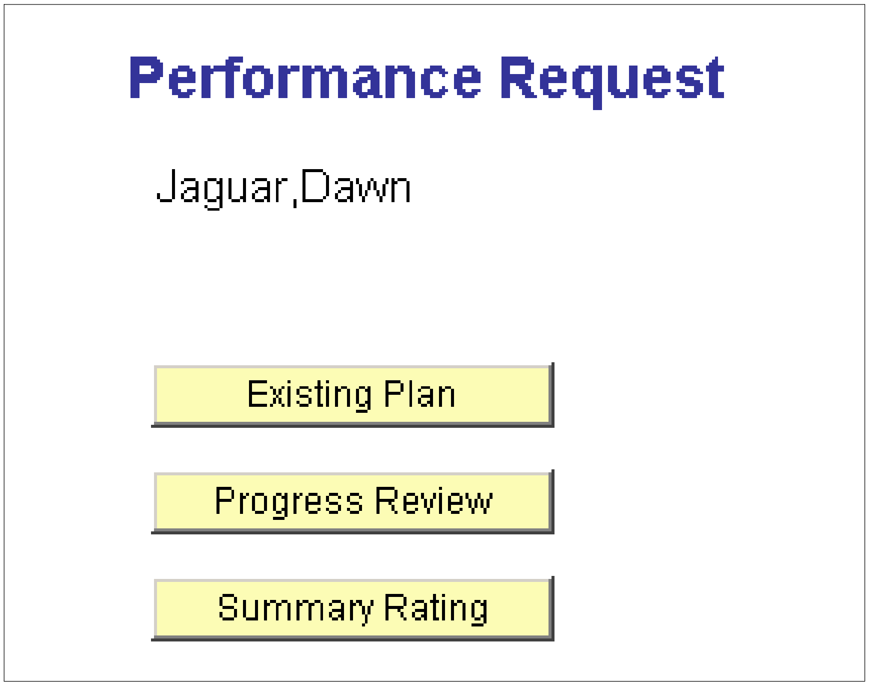


**Figure 468. Performance Request page**

4. Click **Existing Plan**. The Find An Existing Value tab - Employee Views Plan page (**Figure 469** ) is displayed.

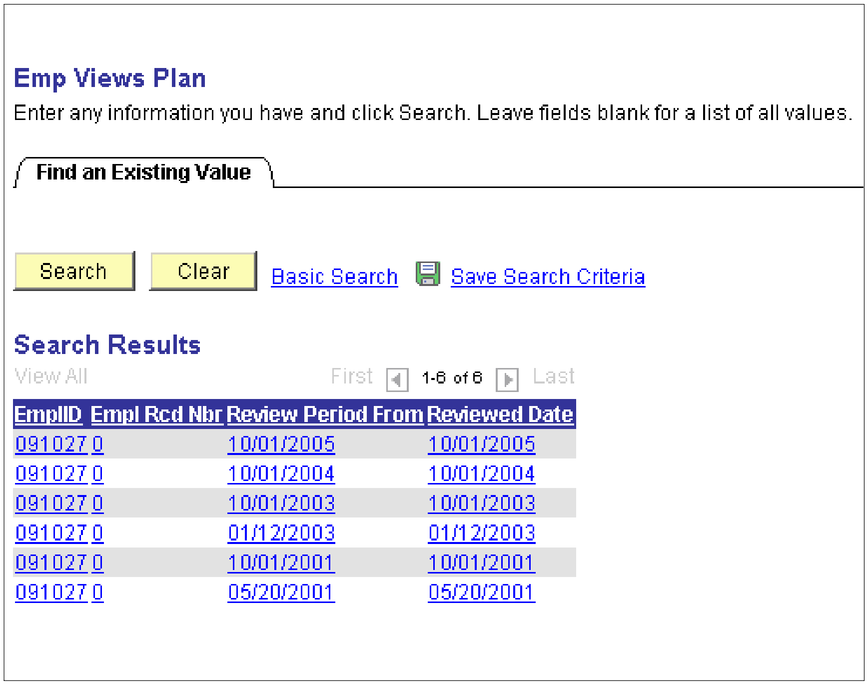


**Figure 469. Employee Views Plan page**

5. Select a plan from the list.
6. Click **Search**. The Performance Plan tab - Employee Views Plan page (**Figure 470** ) for the selected plan is displayed.

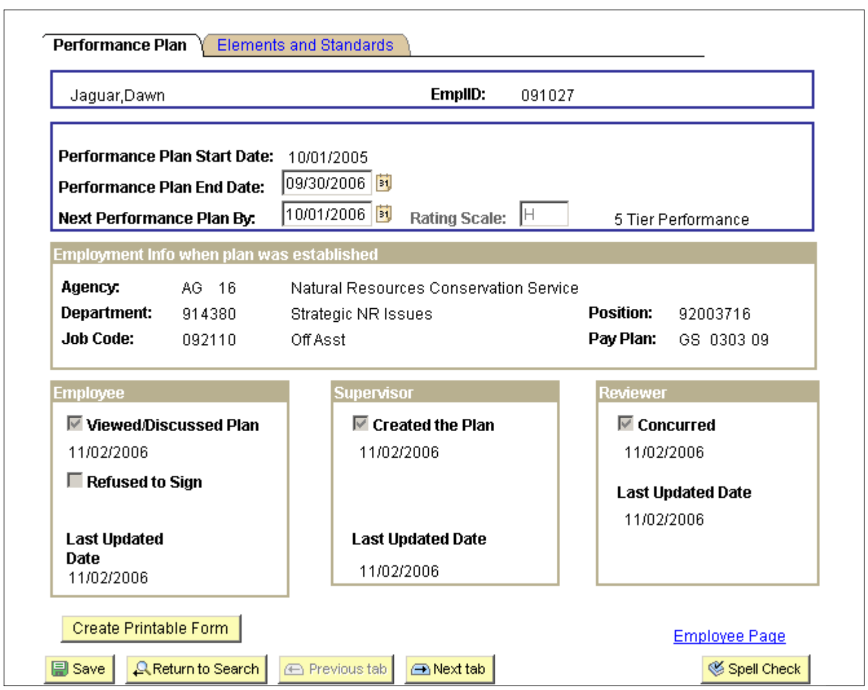


**Figure 470. Performance Plan tab - Employee Views Plan page**

**Note**: There are fields on this page that are populated from other pages in the application. These field cannot be modified.

7. Complete the fields as follows:

**Performance Plan Start Date**

This field is populated from the MSS entry.

**Performance Plan End Date**

Enter the performance plan end date or select a date from the calendar icon.

**Next Performance Plan By**

Enter the date that the next plan is due or select a date from the calendar icon.

**Rating Scale**

This field is populated from the MSS entry.

**Agency**

This field is populated from the ESS logon.

**Department**

This field is populated from the ESS logon.

**Job Code**

This field is populated from the ESS logon.

**Position**

This field is populated from the ESS logon.

**Pay Plan**

This field is populated from the ESS logon.

**Employee/Viewed Discussed Plan**

Check this box if the employee has viewed the plan or discussed with the supervisor. The employee can check this block or the refused to sign block.

**Employee Refused To Sign**

Check this box if the employee refused to sign the rating performance plan. The employee can check this box or the viewed discussed plan box.

**Last Updated Date**

This date is populated once the Viewed Discussed Plan or Refused To Sign box.

**Supervisor/Created The Plan**

This box is checked and dated from the MSS entry.

**Supervisor/Last Updated Date**

This date is the last date the plan was updated and is populated from the MSS entry.

**Reviewed/Concurred**

This box is check and dated by the reviewer of the plan and is populated from the MSS workflow process.

**Reviewed/Last Updated Date**

This is dated by the reviewer of the plan and is populated from the MSS workflow process.

**8.** Click **Create Printable Form** to print the Performance Plan.

**OR**

Click **Save**.

**OR**

Click **Return To Search** to find another performance plan.

**OR**

Click **Next Tab** to advance to the Elements and Standards tab- Employee Views Plan page. The Elements and Standards page (**Figure 471** ) is displayed.

**OR**

Click ***Employee Page*** to go back to the Performance Request tab - Employee Views Plan page (**Figure 468** ).

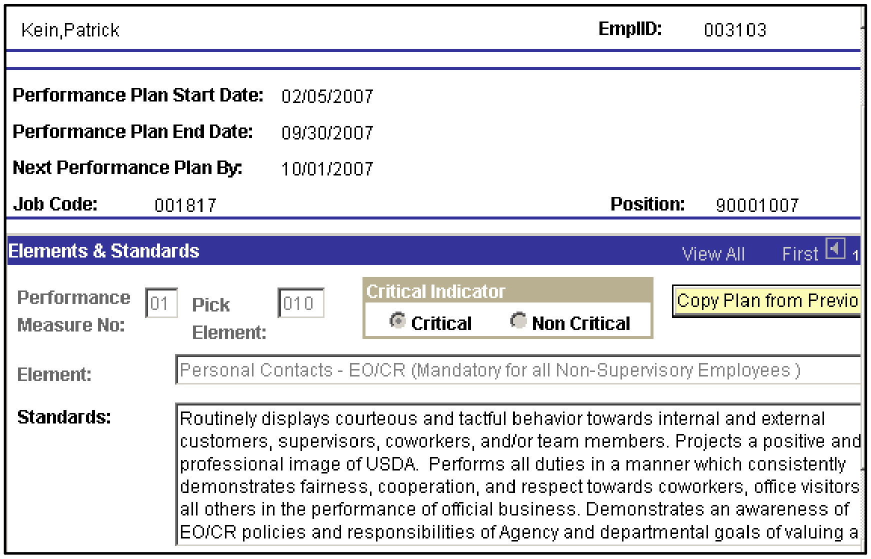


**Figure 471. Elements and Standards tab - Employee Views Plan page**

9. Complete the field as follows:

**Standards**

Enter the function requirement of the standard.

10. Click **Save**.

    **OR**

    Click **Notify** to notify a particular person of the change.

    **OR**

    Click **Previous Tab** to move to the next tab. The Performance Plan tab - Employee View Plan page (**Figure 470** ) is displayed.

    **OR**

    Click **Spell Check** to check the spelling of the explanation of the standard.

    **OR**

    Click **Copy Plan From Previous** to copy a plan from a previous plan.

## *Progress Review*

The Employee Self Service Progress Review option allows employees to view and edit their progress review, elements and standards. The employee cannot edit the Critical and Non-Critical Indicator, however, they can edit the standards detail.

### To enter or modify a Progress Review:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Performance*** component. The Find An Existing Value tab - Self Progress Review page (**Figure 472** ) is displayed.

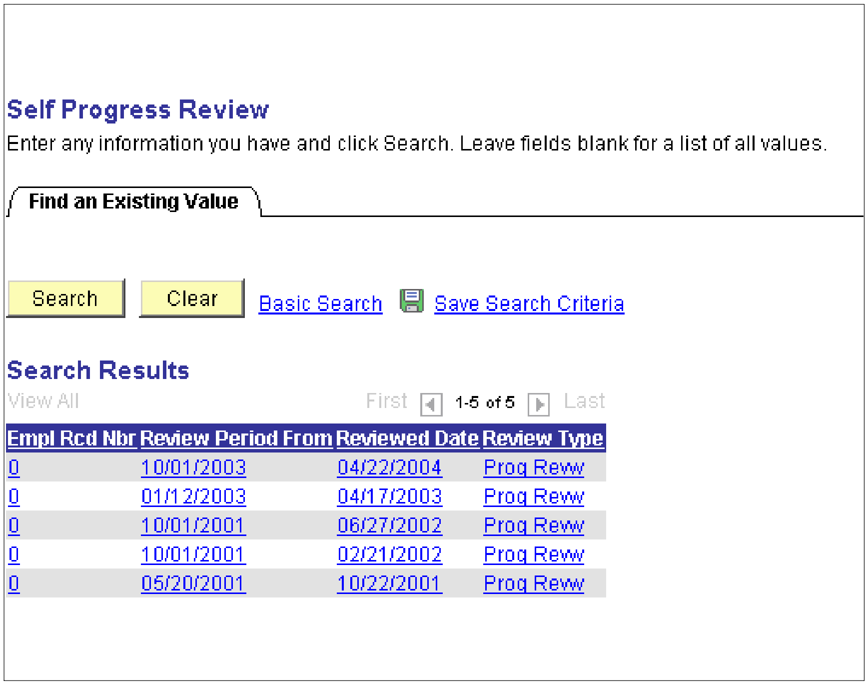


**Figure 472. Self Progress Review tab - Self Progress Review page**

4. Select a Progress Review.
5. Click **Search**. The Progress Review tab - Self Progress Review page (**Figure 473** ) is displayed.

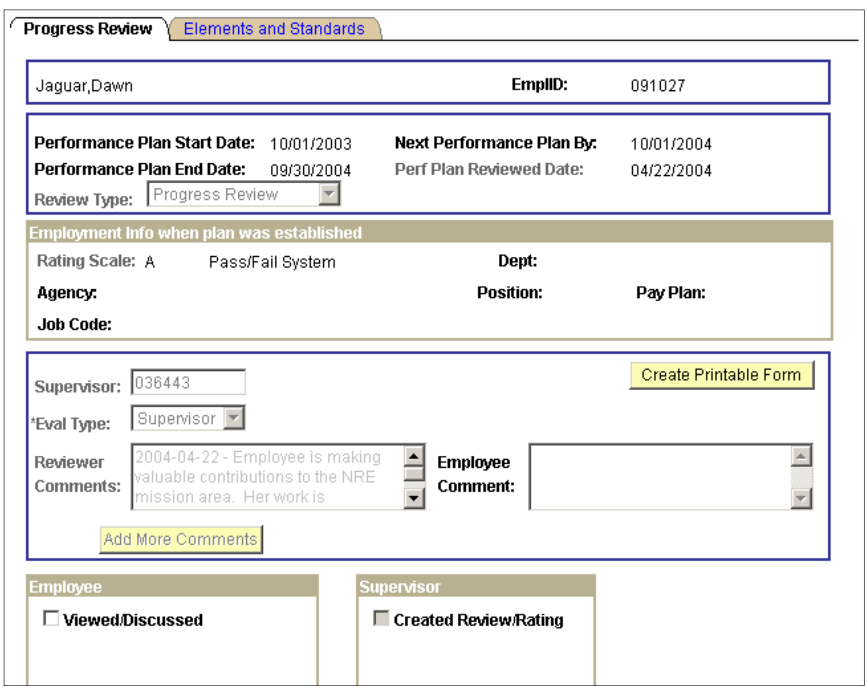


**Figure 473. Progress Review page**

**Note**:There are fields on this page that are populated from other pages in the application. These field cannot be modified.

6. Complete the fields as follows:

**Performance Plan Start Date**

This field is populated from the MSS entry.

**Performance Plan End Date**

Enter the performance plan end date or select a date from the calendar icon.

**Next Performance Plan By**

Enter the date that the next plan is due or select a date from the calendar icon.

**Rating Scale**

This field is populated from the MSS entry.

**Agency**

This field is populated from the ESS logon.

**Department**

This field is populated from the ESS logon.

**Job Code**

This field is populated from the ESS logon.

**Position**

This field is populated from the ESS logon.

**Pay Plan**

This field is populated from the ESS logon.

**Supervisor**

This field is populated from the MSS entry.

***Evaluation Type**

This field is populated from the MSS entry.

**Employee Comment**

Enter the comments for the progress review.

**Reviewer Comments**

This field is populated from the MSS entry.

**Note**: Click **Add More Comments** to add additional reviewer or employee comments.

**Employee/Viewed/ Discussed**

Check this box if the employee viewed the performance plan and if the manager has discussed the plan with the employee. The current date is populated.

**Supervisor/Reviewed/ Rating**

This box is checked if the supervisor created/reviewed the progress review. The current date is populated.

**Reviewer/Concurred Rating**

This box is checked if the reviewed has reviewed the progress review. The current date is populated.

7. Click **Save**.
8. Click **Return To Search**.

   **OR**

   Click **Next Tab**. The Elements and Standards tab - Self Progress Review page (**Figure 474** ) is displayed.

   **OR**

   Click ***Employee Page*** to return to the list of progress reviews.

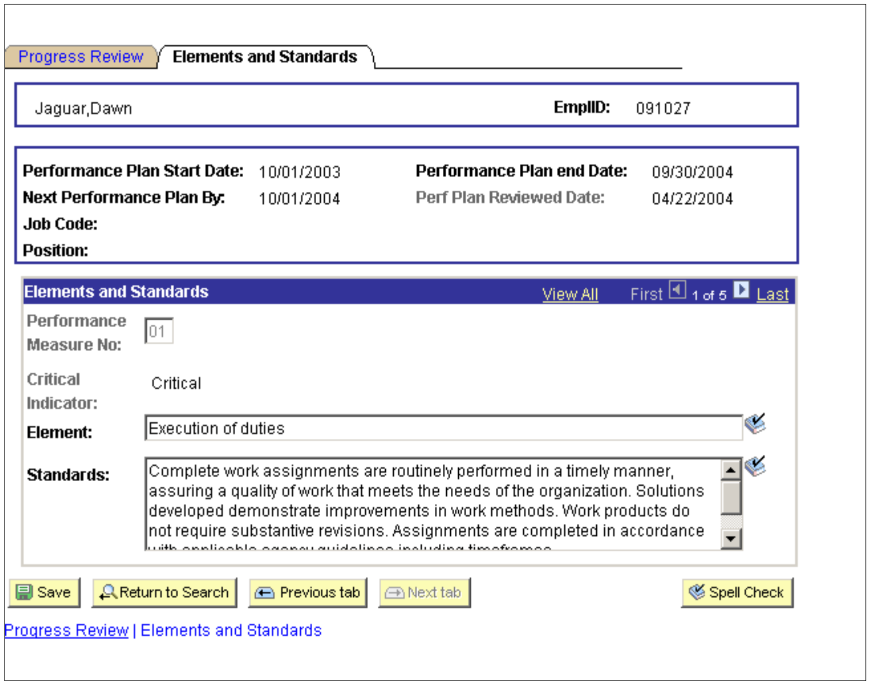


**Figure 474. Elements and Standardstab - Self Progress Review page**

9. Complete the fields as follows:

**Element**

This field is populated with information. Change if applicable.

**Standards**

This field is populated with information. Change if applicable.

10. Click **Save**.
11. Click **Spell Check** to check the spelling of the Standards.
12. Click **Return To Search**.

    **OR**

    Click **Previous Tab**. The Performance Plan tab - Self Progress Review page (**Figure 470**) will display.

## *Summary Rating*

The ESS Summary Rating option allows employees to view or edit their summary rating (final rating). When the employee selects the Summary Rating button, any rating that has started is displayed.

**To review/edits a Summary Rating:**

1. Select the ***Employee Self Service*** menu group.

2. Select the ***Tasks*** menu.

3. Select the ***Performance*** component. The Find An Existing Value tab - Self Progress Review page (**Figure 475** ) is displayed.

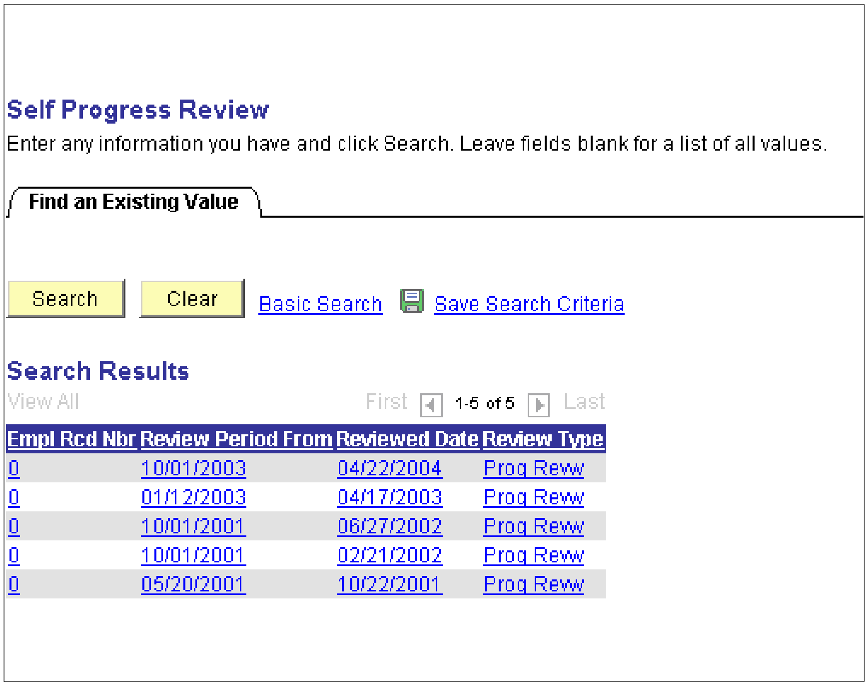


**Figure 475. Find An Existing Value tab - Self Progress Review page**

4. Select a Summary Rating.

5. Click **Search**. The Summary Rating page (**Figure 476**) is displayed.

Figure 476.  Summary Rating page (DPR REPORTED)

**Note**:There are fields on this page that are populated from other pages in the application. These field cannot be modified.

6. Complete the fields as follows:

**Performance Plan Start Date**

This field is populated from the MSS entry.

**Performance Plan End Date**

Enter the performance plan end date or select a date from the calendar icon.

**Next Performance Plan By**

Enter the date that the next plan is due or select a date from the calendar icon.

**Rating Scale**

This field is populated from the MSS entry.

**Agency**

This field is populated from the ESS logon.

**Department**

This field is populated from the ESS logon.

**Job Code**

This field is populated from the ESS logon.

**Position**

This field is populated from the ESS logon.

**Pay Plan**

This field is populated from the ESS logon.

**Supervisor**

This field is populated from the MSS entry.

***Evaluation Type**

This field is populated from the MSS entry.

**Employee Comment**

Enter the comments for the progress review.

**Reviewer Comments**

This field is populated from the MSS entry.

**Note**: Click **Add More Comments** to add additional reviewer or employee comments.

**Employee**

Check this box if the employee viewed the summary rating and if the manager has discussed the plan with the employee. The current date is populated.

**Supervisor/Created Review/Rating**

This box is checked if the supervisor created/reviewed the summary rating. The current date is populated.

7. Click **Save**.

## Manager Authorizes Restored Leave

**To view authorized Restored Leave:**

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.

3. Select the ***Mgr Authorizes Restored Leave*** component. The Find An Existing Value tab - Mgr Authorized Restored Leave page (**Figure 477** ) is displayed.


**Figure 477. Find An Existing Value tab - Manager Authorized Restored Leave page**

4. Complete the fields as follows:

**Search By**

This field defaults to **`EmplID`**. To change, select data from the drop-down list. The valid value is **`EmplID`**.

**Begins With**

Enter the corresponding data for the search by value.

5. Click **Search**. The Authorized Restored Leave tab page (**Figure 478** ) is displayed.

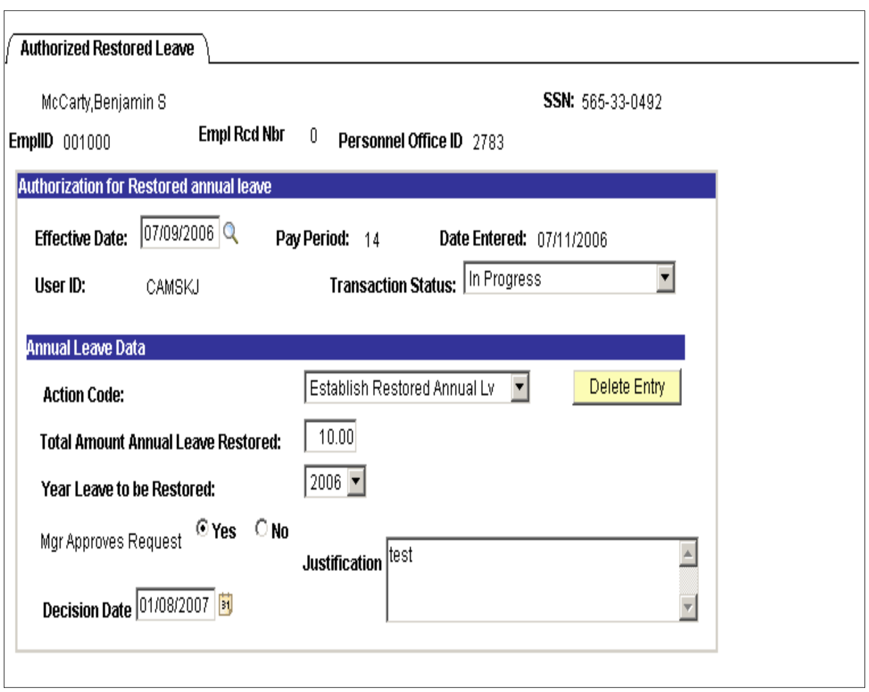


**Figure 478. Authorized Restored Leave page**

6. Complete the fields as follows:

**Effective Date**

This field is automatically populated with the beginning date of the current pay period. Change the date if applicable.

**Date Entered**

This date is populated.

**User ID**

This field is populated when the employee signs on to Employee Self Service.

**Transaction Status**

This field defaults to **`In Progress`** and reflects the status of the transaction. The transaction status will change when the transaction is saved, in SINQ, or resent to NFC.

**Action Code**

Enter the applicable data or select data from the drop-down list. The valid values are:

**Total Amount Of Annual Leave Restored**

Enter the total number of hours to be restored. Use a decimal to record the quarter hour.

**Year Leave To Be Restored**

Enter the year of the leave to be restored or select data from the drop-down list.

**Mgr Approves Request**

The manager checks **`Yes`** if the restored leave is approved. The manager checks **`No`** if the restored leave is disapproved.

**Decision Date**

Enter the date the managers decision was made or select a date from the calendar icon.

**Justification**

Enter the justification for the approval or disapproval of the restored leave.

7. Click **Save** to save the information.

**OR**

Click **Notify** to send the information to another manager.

**OR**

Click **Delete Entry** to delete the entered information.

# Change Proposed Effective Dates

This process allows the manger to change proposed effective dates on Hires and Rehires.

**To change proposed Effective Dates:**

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Change Proposed Effdt*** component. The Change Proposed Effective Date page (**Figure 479** ) is displayed.


**Figure 479. Change Proposed Effective Date page**

4. Enter a date in the `Proposed Effective Date` field or select data from the calendar icon.
5. Click **Process**. The proposed effective date has been changed.

# Contact Information

This section includes the following topics:

[Email Address]

[Emergency Contacts]

[Home Address]

[Phone Numbers]

## *Email Address*

This section explains how to enter an email address.

**To enter an Email Address:**

1. Select the ***Employee Self Service*** menu group.

2. Select the ***Tasks*** menu.

3. Select the ***Contact Information*** component. The Contact Information page (**Figure 480** ) is displayed.

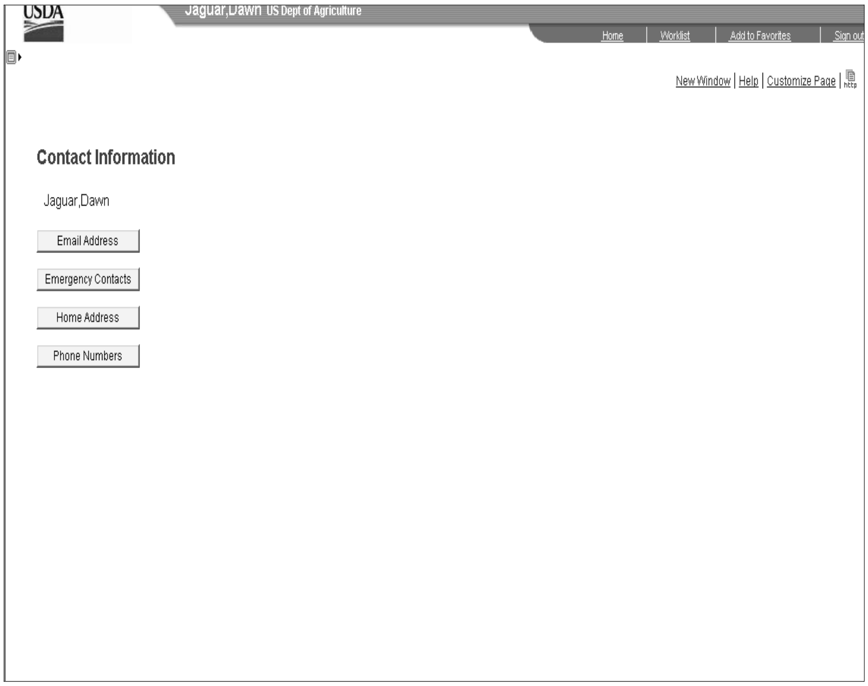


**Figure 480. Contact Information page**

4. Select ***Email Address***. The Email Addresses page (**Figure 481** ) is displayed.

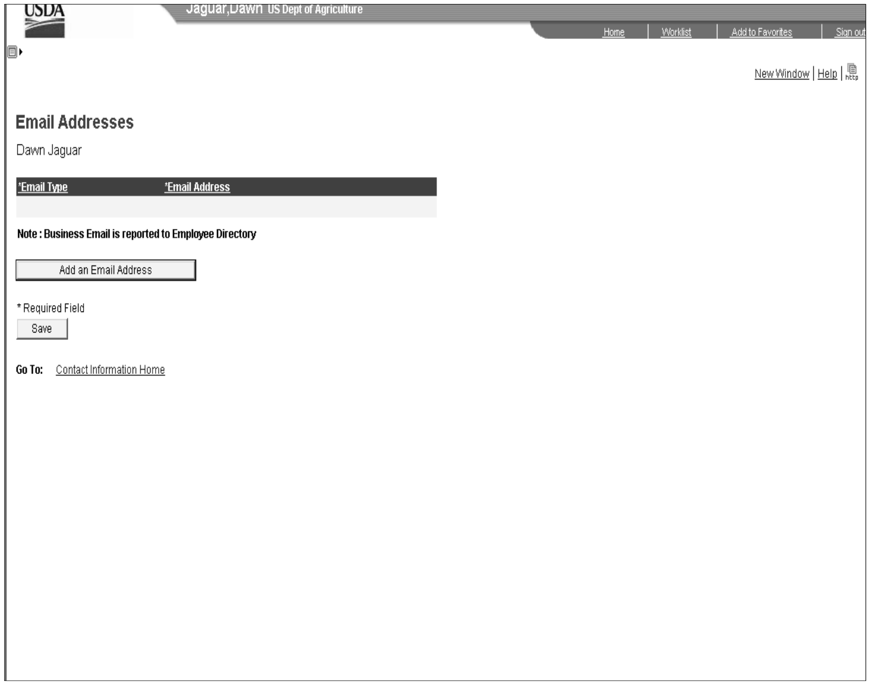


**Figure 481. Email Addresses page**

5. Click **Add An Email Address**.

6. Complete the fields as follows:

***Email Type**

Enter the type of email address or select data from the drop-down list. The valid values are:

***Email Address**

Enter the email address.

**Note**: If an email address is established, click **Delete** to delete the established email address.

7. Click **Save**.

8. Click **OK**.

9. Click ***Contact Information Home***.

## *Emergency Contacts*

This section will explain how to enter an emergency contact.

**To enter an Emergency Contact::**

1. Select the ***Employee Self Service*** menu group.

2. Select the ***Tasks*** menu.

3. Select the ***Contact Information*** component. The Contact Information page (**Figure 480** ) is displayed.

4. Select the ***Emergency Contacts*** option. The Emergency Contacts page (**Figure 482** ) is displayed.


**Figure 482. Emergency Contacts page**

5. Click **Add An Emergency Contact**.

6. Complete the fields as follows:

***First Name**

Enter the first name of the emergency contact.

**Middle Name**

Enter the middle name if applicable.

***Last Name**

Enter the last name of the emergency contact.

**Name Suffix**

Enter the suffix for the name if applicable or select data from the drop-down list. The valid values are:

***Relationship To The Employee**

Enter the relationship the contact is to the employee or select data from the drop-down list. The valid values are:

**Contact Has The Same Address**

Check this box if the contact has the same address as the employee.

**Conact Has The Same Phone Number**

Check this box if the contact has the same phone number as the employee.

7. Click **Save**.
8. Click **OK**.
9. Click **Edit** to modify an emergency contact.
10. Click **Delete** to delete an emergency contact.

## *Home Address*

This section will explain how to enter a Home Address Contact.

**To enter a home address:**

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Contact Information*** component. The Contact Information page (**Figure 480** ) is displayed.
4. Select the ***Home Address***. The Home Address page (**Figure 483** ) is displayed.

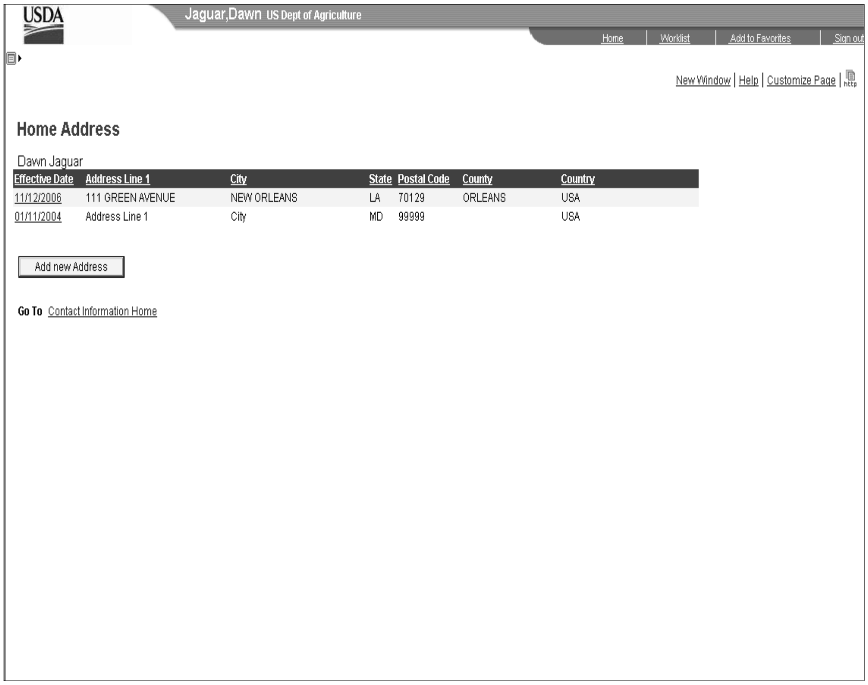


**Figure 483. Home Address page**

5. Click **Add New Address**.

6. Complete the fields as follows:

***Date Address Is Effective**

Enter the date that the address is effective or select a date from the calendar icon.

***Address Line 1**

Enter the address for the home address.

**Address Line 2**

Enter the 2nd line of the home address if applicable.

**Address Line 3**

Enter the 3rd line of the home address if applicable.

***City**

Enter the city of the home address.

***State**

Enter the state of the home address.

***Postal Code**

Enter the zip code of the city.

**Country**

This field defaults to **USA**. Change by selecting data from the search icon.

7. Click **Save**.
8. Click **OK**.

## *Phone Numbers*

This section will explain how to enter a Phone Number.

### To enter a Phone Number:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Contact Information*** component. The Contact Information page (**Figure 495** ) is displayed.
4. Select ***Phone Numbers***. The Phone Numbers page is displayed.

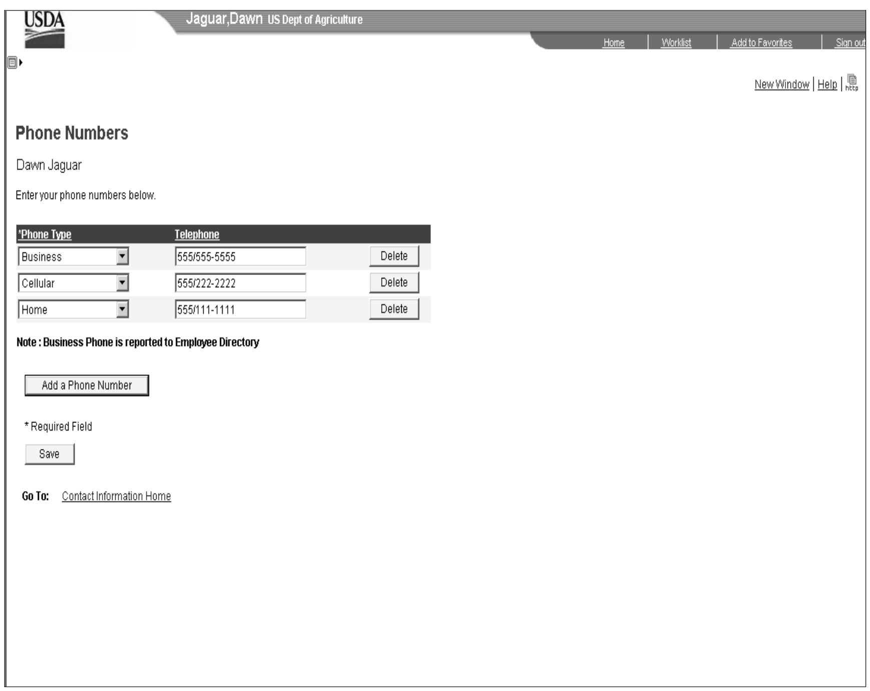


**Figure 484. Phone Numbers page**

5. Click **Add A Phone Number**.
6. Complete the fields on the Phone Numbers page as follows:

***Phone Number Type**

Enter the type of phone number or select data from the drop-down list. The valid values are:

**Telephone**

Enter the telephone number.

**Note**: If a phone number has been previously established, click **Delete** to delete the established phone number.

7. Click **Save**.

8. Click **OK**.