



UKG Team Member Employee Self-Service (ESS) Job Aid

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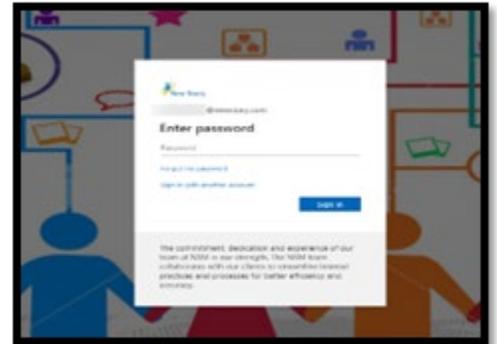
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Login, Change & Reset Password

URL: <https://www.office.com>

Username: Your complete company email address

Password: Your current Windows / O365 password



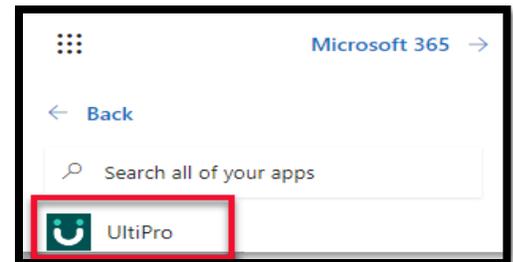
Using www.office.com to log into UKG:

1. Log into Office 365 using your full email address and Windows / Office 365 password.

Note: You may be asked to verify your account through a text message or a phone call.

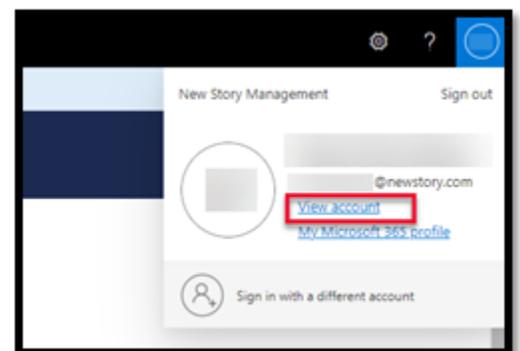


2. Select the waffle icon and click the UltiPro / UKG application. If you do not see the UltiPro/ UKG application, click 'All Apps' and scroll until you find UltiPro (UKG).



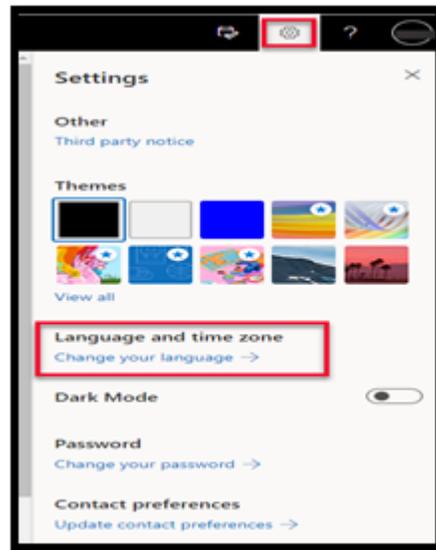
Change Your Office365 Password

1. Go to www.Office.com and sign in.
2. To change your Office.com password click your initials or picture in the top right corner and select 'View account.'
3. Select 'Password'
4. Change your password.

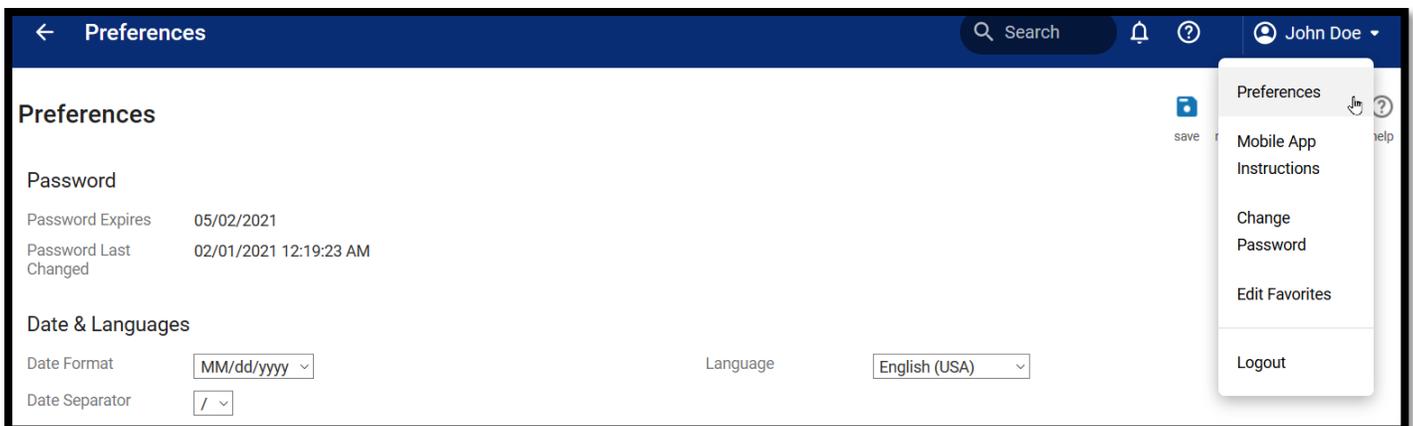


Customize Your Language Preference

You can set your language preference on the Log In screen, Settings>Language and time zone.



You may also change the language preference after you have logged in by using the drop-down next to your name on the home screen. Choose the Preferences option and click the Edit button.



While in Edit mode, you can choose the language of your choice from the drop-down options that are available. You may also change your password at any time by using the options shown above.

Customize Your Home Page

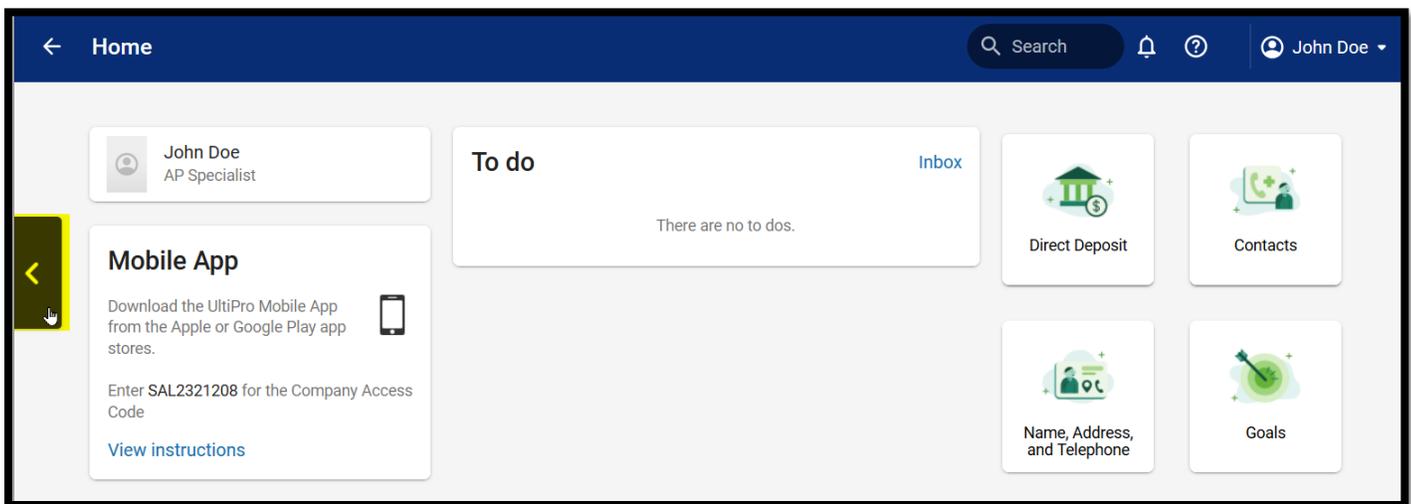
Home Page Personalization Overview

Personalize the home page by switching between the Smart and Classic Dashboards and configuring which Quick Links appear on the Smart Dashboard.

Switch Between Smart and Classic Dashboards

Switch between the Smart and Classic Dashboards on the home page.

To switch between the Smart and Classic Dashboards: From either dashboard, hover over the gray vertical bar on either side of the page. The navigation arrow appears.



You can personalize the Smart Dashboard by configuring which Quick Links appear. Available Quick Links are based on your web access rights. From the Smart Dashboard, you can do the following:

Remove a Quick Link

1. From the Smart Dashboard, hover over the desired Quick Link.
2. In the top-right corner of the Quick Link, select the X. The Quick Link is removed.

Add a Quick Link

1. From the Smart Dashboard, select an empty topic.
2. From the Quick Link drop-down list, select a Quick Link.
3. Select Add. The Quick Link appears.

Time Management

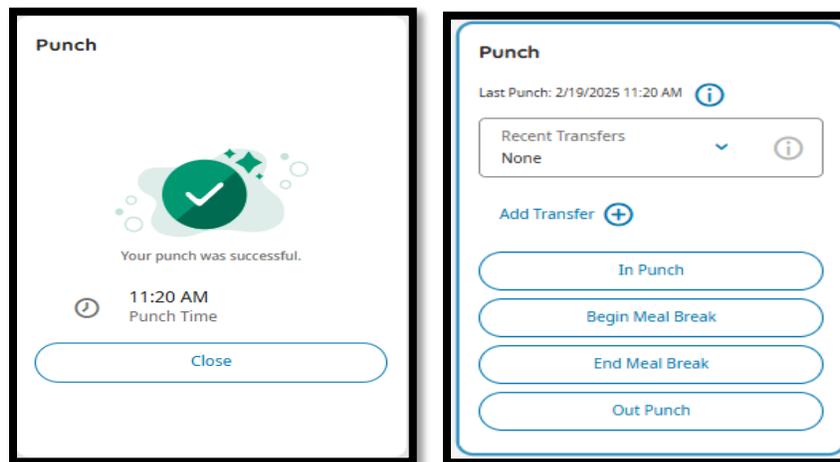
Workforce Management is where you enter a punch and request time off.

You can access this area by navigating to Myself > Workforce Management

Punch In / Punch Out Web

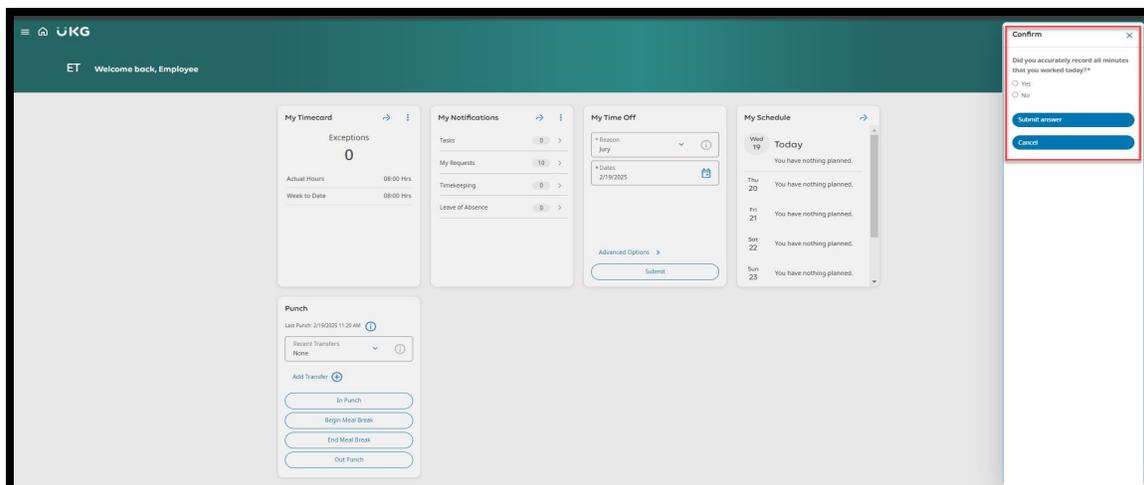
Click on the Punch Tile to start recording your “In punch” for the day.

- Use the “In Punch” when first arriving at work or the “End Meal Break” when returning from lunch. The “In punch” or “End Meal Break” would indicate you are starting to work.
- The punch tile will show the “Last Punch” that was entered. This is a confirmation that the punch was recorded on the timecard. A punch can also be viewed on the timecard.

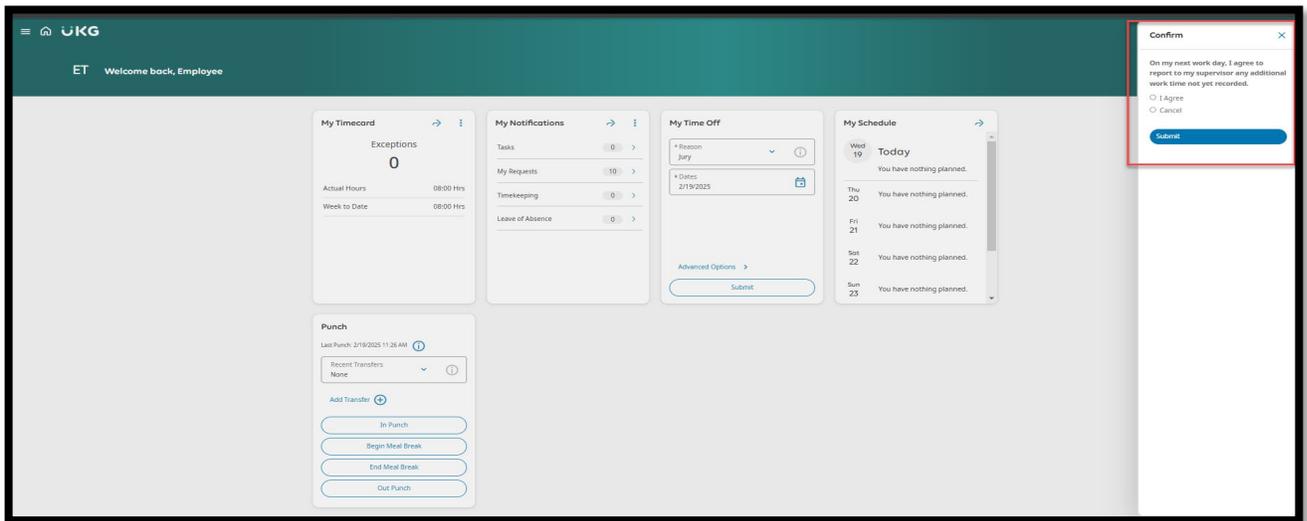


Click on “Out Punch” to record your punch and attest to your hours being accurate.

- Use the “Out Punch” when leaving work for the day or use the “Begin Meal Break” when clocking out for lunch. The “Out punch” would indicate you are not performing work or have left for the day.
- When you select “Out Punch” a box appears in your window to ask you if you accurately recorded your time.

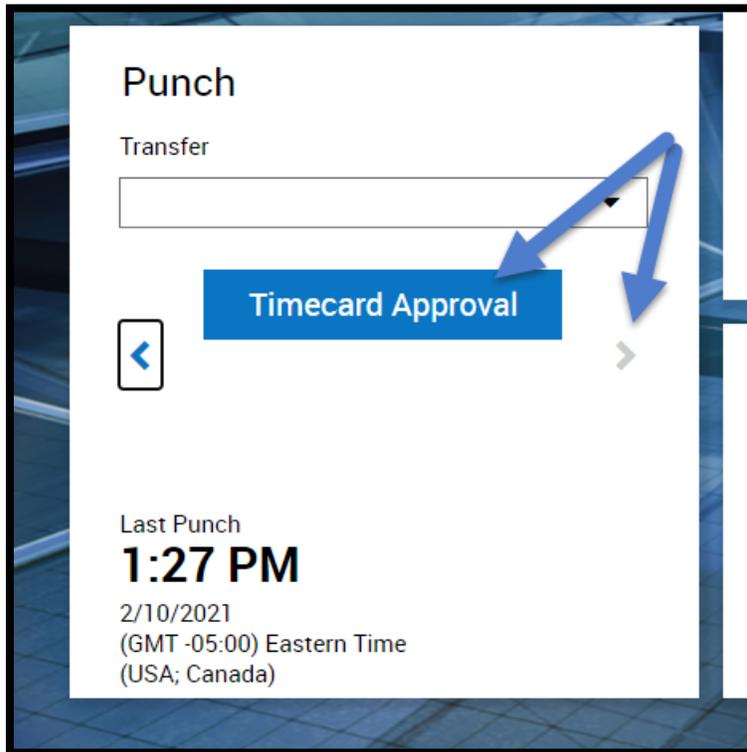


- If you select yes, the punch tile will show Last Punch for the day and no further action is necessary.
- If you select no, a new message appears, confirming you will notify your manager on your next day worked that additional time needs to be recorded or corrected.

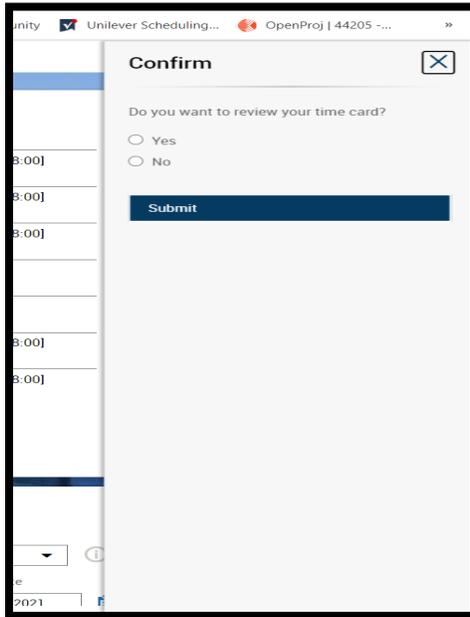


Time Card Approval

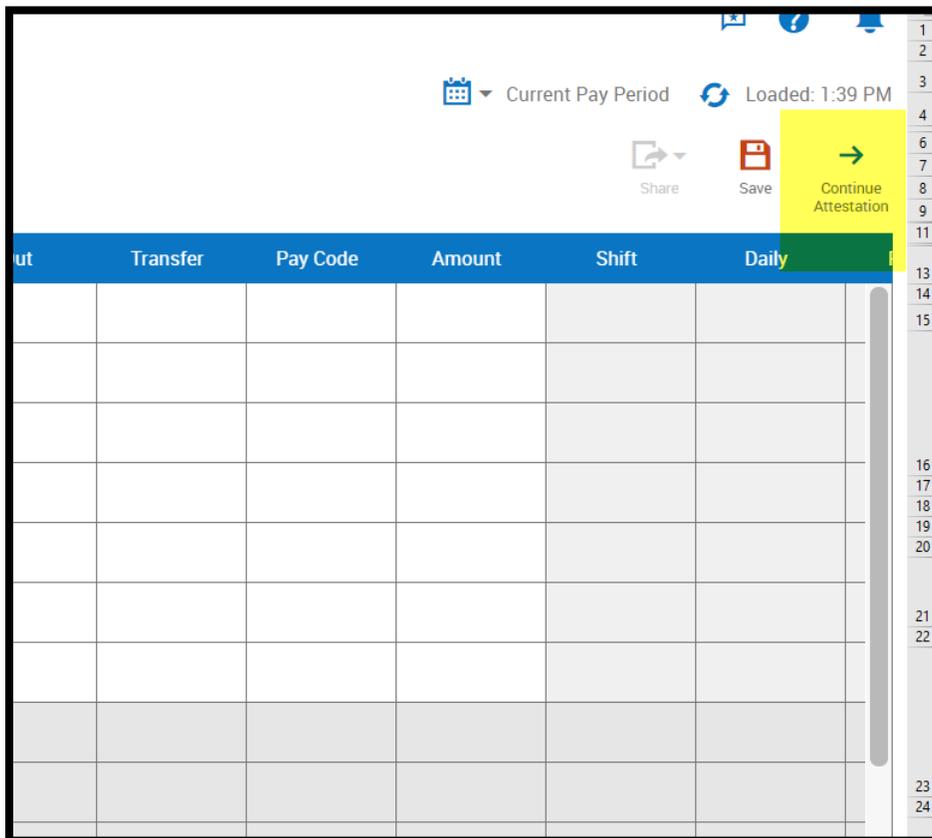
On the Punch tile, select the arrow to scroll to the right, select Timecard Approval.



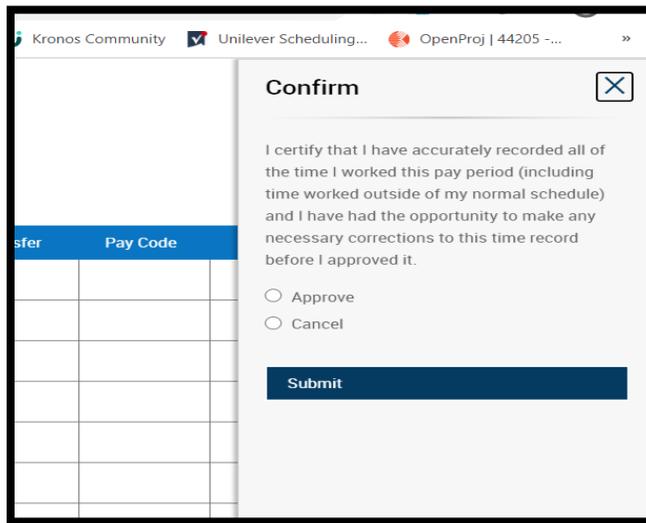
Once the Attestation form opens Select Yes to continue to your timecard for review, select Submit
 1. If you Select No the process ends.



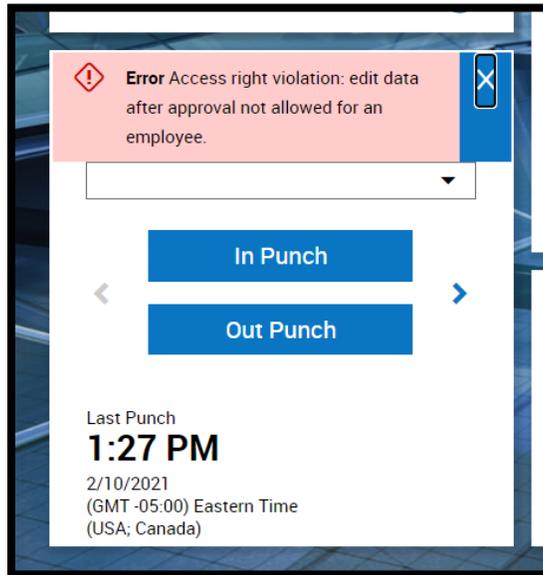
After you select Submit in the Attestation form process your Timecard opens for review. To continue through the Attestation process select Continue Attestation in the upper right side of your timecard.



The Attestation form opens, Select Approve. Once you Approve your timecard is approved, you are no longer able to add punches to that pay period and you are brought back to your Home screen. If you select Cancel no approval takes place and you are brought back to your Home screen.



If you receive the following error when Punching in for the day, you need to open your timecard and remove the approval. Once a timecard is approved the employee is unable to Timestamp in or out.



My Timecard

Current Pay Period

List View Approve Remove Approval

		Date	Schedule	Absence	In	Out	Transfer	In	Out	Transfer	Pay Code	Amount	Shift
+	🗑️	Sat 2/06											
+	🗑️	Sun 2/07											
+	🗑️	Mon 2/08	7:00 AM - 3:00 PM	🚫									
+	🗑️	Tue 2/09	7:00 AM - 3:00 PM	🚫									
+	🗑️					6:19 PM							

Submit Time Off Request

To submit a time off request, visit UKG and select the “Workforce Management” tab under **Myself**.

1. From the Dimension landing page, navigate to the “My Time Off” tile and select the drop-down arrow.

The screenshot shows the 'My Time Off' form. The 'Reason' dropdown menu is open, displaying 'PTO: 126:07 Hour(s)' as the selected option. Below the dropdown are fields for 'Start Date' (7/29/2021) and 'End Date' (7/29/2021), each with a calendar icon. A blue 'Submit' button is at the bottom, and an 'Advanced Options' link with a right-pointing arrow is at the bottom right.

2. After selecting the drop-down arrow, you will see several time off categories to select from such as PTO, vacation, bereavement, sick time and more. The items available in the drop down are contingent upon your company. Select the correct category for your time off.

This screenshot shows the 'Reason' dropdown menu expanded to show a list of categories: 'PTO: 126:07 Hour(s)', 'ATWP', 'BEREV', 'CMBANK', and 'DPERS'. The 'PTO' option is currently selected. The rest of the form, including the date fields and 'Submit' button, is visible in the background.

3. Using the calendar icons, select the appropriate dates for your time off period. You may also select “Advance Options” to view the calendar for the current and upcoming month.

The screenshot shows the 'My Time Off' form with a calendar open for July 2021. The calendar grid shows dates from 27 to 31. The 29th is highlighted in red. The 'Reason' dropdown is set to 'Vacation'. The 'Start Date' and 'End Date' fields are both set to 7/29/2021. The 'Submit' button and 'Advanced Options' link are also visible.

4. After you have selected the appropriate time off request code and date(s), click the submit button. You will receive a notification that your time off request was submitted.

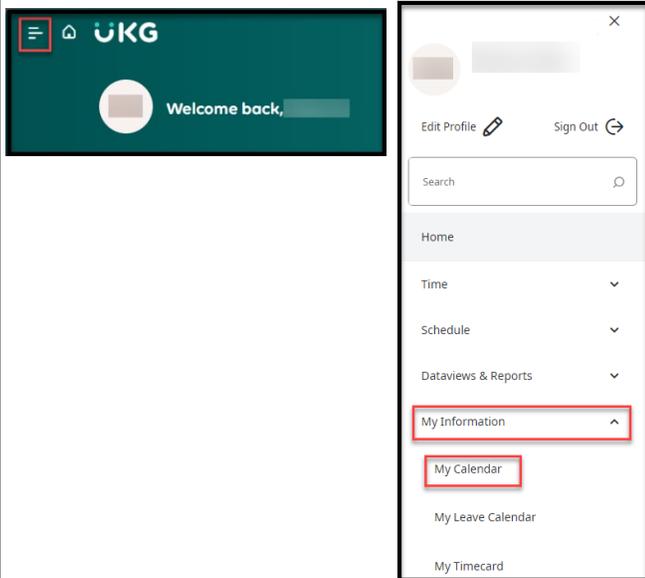
This screenshot shows the 'My Time Off' form with a blue notification banner at the top that reads 'Information: Your time-off request has been submitted'. The form fields are now filled with 'SUMMR' for the reason, and both 'Start Date' and 'End Date' are set to 7/29/2021. The 'Submit' button is prominent, and the 'Advanced Options' link is at the bottom right.

Your manager will receive a time off request notification and will determine if the request is approved.

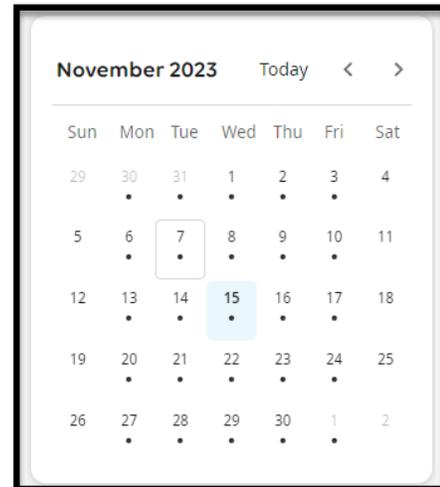
Cancel Time Off Request

To submit a time off cancellation request, visit UKG and select the “Workforce Management” tab under **Myself**.

1. From the Workforce Management landing page, navigate to the main menu icon > My information > My Calendar.



2. Select the date that you want to cancel from the calendar, then click on the time off request to open request details.

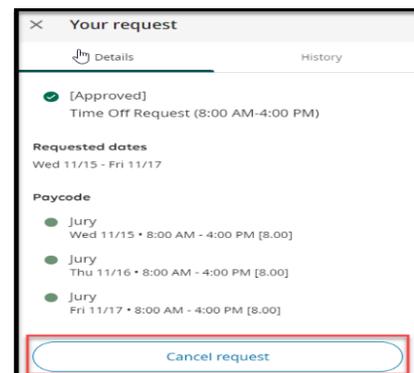


3. Once you select the date, your schedule list will display the date. Click on the time off request to open request detail.



4. Click “Cancel Request”

Please note: You cannot cancel a single day that was included in a time-off request that included multiple days. You can only cancel the complete request (all days in the series that were requested.)



Note: Your manager will receive a time off cancellation request notification and will need to approve it before it is removed from your schedule / timecard. Your manager will manually add back your scheduled time on your timecard.

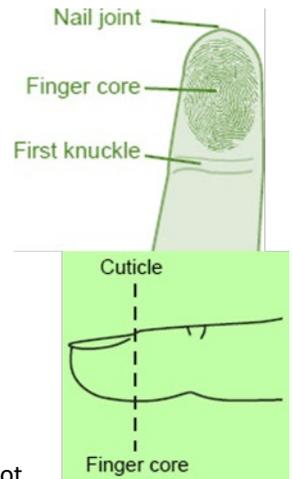
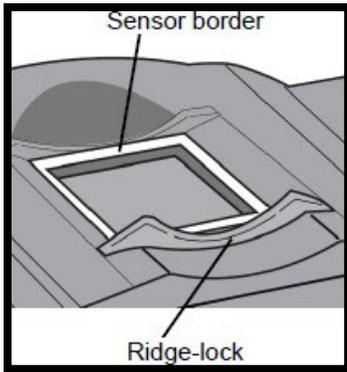
Punch In / Punch Out Physical Time Clock

Applicable to New Story Schools and Green Tree Staff

InTouch Biometric Verification Enrollment Quick Reference Guide

Step 1: Select Finger to Enroll

Index, middle, or ring fingers are recommended. Avoid using thumb and pinky fingers since they are awkward to position consistently on the sensor. Some finger conditions (like dry skin, scarring, or water logged fingers) may cause difficulty in enrolling and should be avoided.

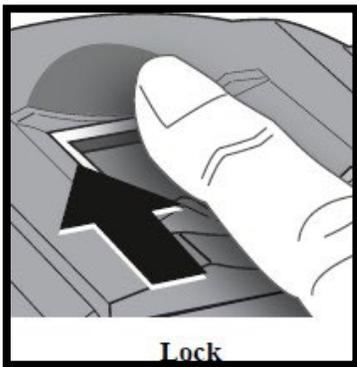


Step 2: Place Finger on Sensor Using Lock, Drop, and Hold

Lock: Slide your finger along the *ridge-lock*, without touching the sensor, until the 1st knuckle rests on the ridge-lock. If your finger is small, slide your 1st knuckle slightly *past* the ridge-lock so that the nail joint crosses the white border of the sensor.

Drop: Drop your finger flat onto the surface of the sensor, with your finger core in the center of the sensor. Apply moderate pressure. Do not rotate or slide your finger.

Hold: Hold your finger on the sensor until the LED flashes and a result is displayed, and then remove it.



Step 3: Review Capture Results

Res	Action
Good Enrollment	<ul style="list-style-type: none"> • Proceed to Step 4
Fair Enrollment, Poor Enrollment,-or- Failure	<ul style="list-style-type: none"> • Tap the "Retry" button and return to step 2 to retry this finger. • Tap "Change Finger" if you have tried this finger 3 times and return to step 1 to select a different finger. • Tap "Accept Best" and proceed to step 4 if you have tried all fingers 3 times.

Step 4: Place Finger on Sensor Again for Enrollment Test

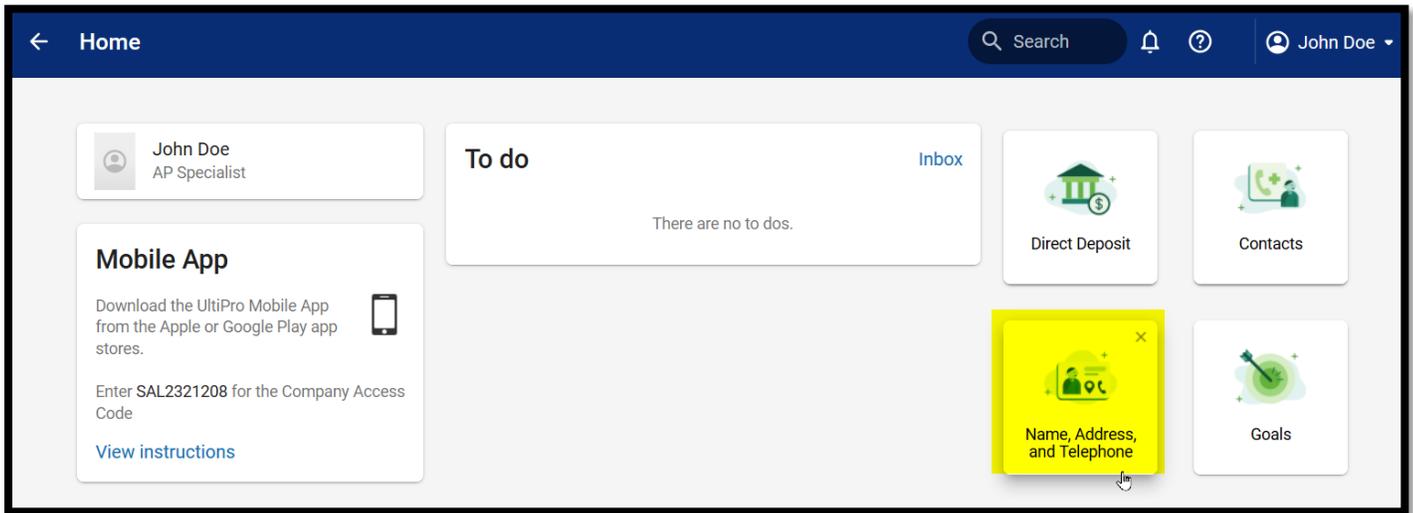
Place your finger on the sensor again using the Lock, Drop, and Hold method as you did in Step 2. Review the enrollment test results.



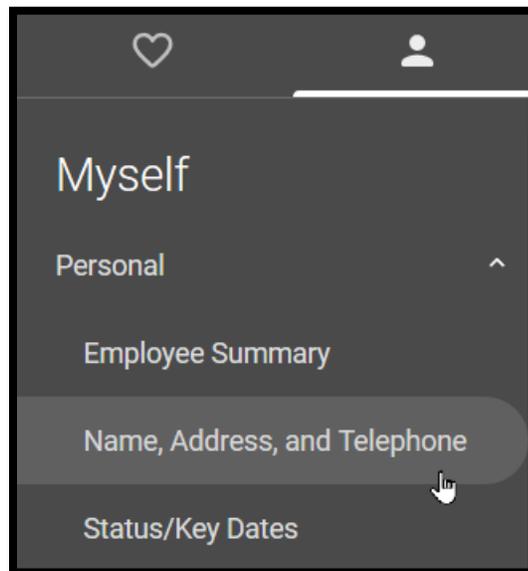
Result	Action
Accepted	<ul style="list-style-type: none"> • Return to step 1 and select a secondary finger from your other hand to enroll.
Failed	<ul style="list-style-type: none"> • Tap the "Retry" button and place finger on the sensor again.
Unable to Verify Enrollment	<ul style="list-style-type: none"> • Tap "Change Finger" and return to step 1 to select a different finger. • Tap threshold "low" and place finger again if you have tried all other fingers • Tap threshold "none" and place finger again if you have tried threshold "low" on all other fingers

Change Name, Address and Telephone

You can access the Name, Address and Telephone menu in two ways. If the Quick Link has been added to the dashboard, you can click it.



From the Home Screen you can select Menu > Myself > Personal > Name, Address and Telephone.



Then click on the 'Edit' button or 'Change Name, Address or Telephone' in the Things I Can Do section.

Name, Address, and Telephone

Name: John Doe
 Preferred: John
 Former last:
 Marital status:
 Address: 123 Main St, New York, NY 10001, United States
 Primary Home Phone: (Private)
 Primary Work Phone:
 Work extension:
 Primary e-mail:
 Alternate e-mail:

Mailstop:
 Alternate Phone Numbers:

Type ↑	Phone	Extension	Country	Country Prefix	Private
No records found					

The new address should be entered into the Quick Address Search field.

Change Name, Address, or Telephone

Prefix: [Dropdown]
 First: John
 Middle:
 Last: Doe
 Suffix: [Dropdown]
 Preferred first: John
 Former last:
 Marital status: [Dropdown]

Address

Quick Address Search: 100 Main St, New York, New York, USA

Country: United States
 Address: 100 Main St
 Address Line 2:
 City: New York
 State/Province: New York

Update fields as needed and 'Save'.

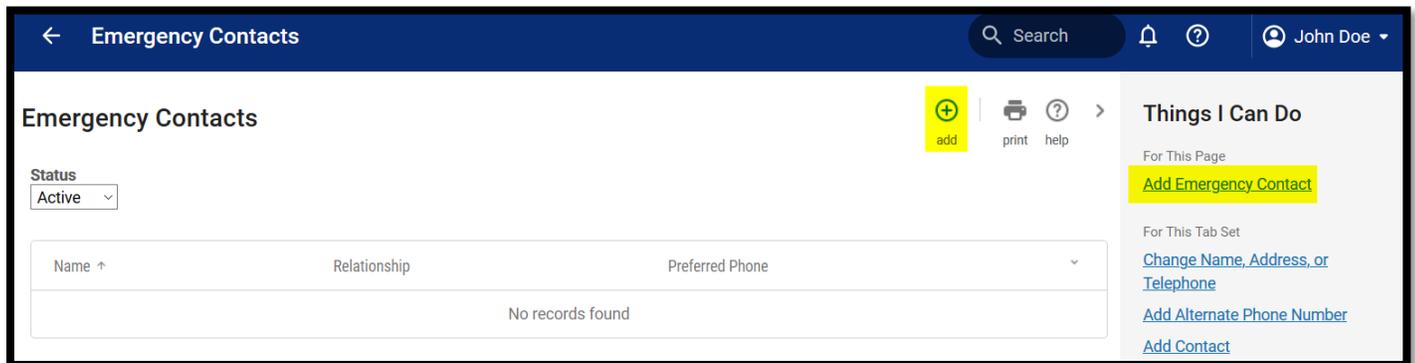
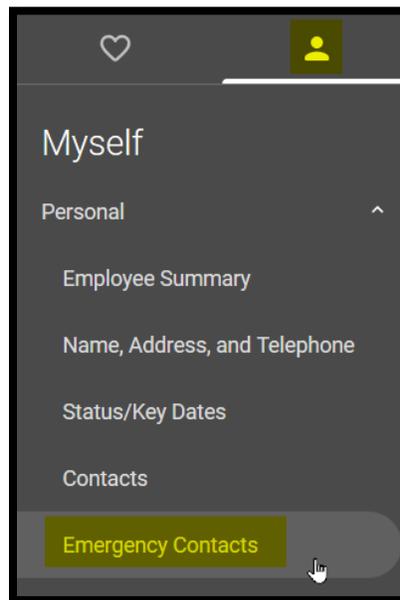
For additional help, be sure to use the Quick Tours and Tips on any screen.

Note: All changes will be in Pending status until approved by either HR or payroll. You may be required to submit supporting documentation before the change becomes effective. You will be notified if needed.

Add or Update Your Emergency Contacts

Your Emergency Contacts should include anyone who can be notified in the event of an emergency situation. We strongly encourage everyone to take the time to check all your contacts to ensure that their information is accurate and up to date.

From your home page, click Myself > Emergency Contacts. Alternatively, you can click the icon if you choose to have it present on your home page.



To add an Emergency Contact who is not already in the system, either click the green plus sign, or 'Add Contact' in the 'Things I Can Do' section.

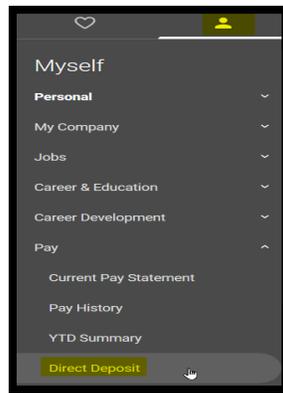
When filling out the information, be sure that 'Contact is active' is checked at the top.

Once you save, you will see your active Emergency Contact that you just added to your Contacts. The box will have a check mark confirming that person is your Emergency Contact.

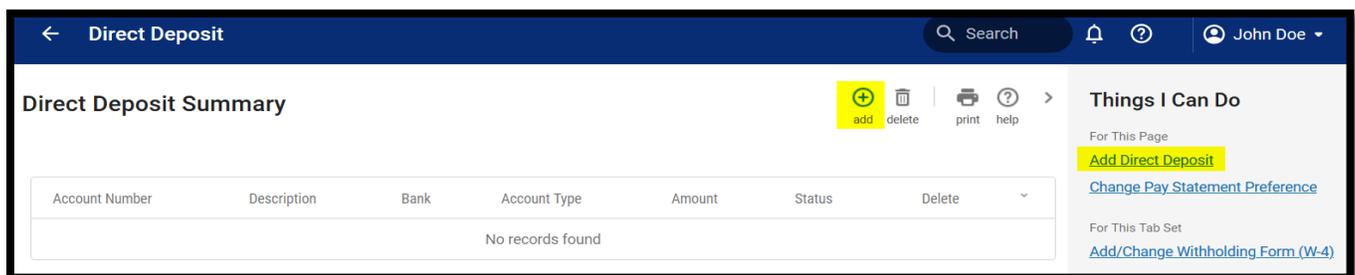
For additional help, be sure to use the Quick Tours and Tips on any screen.

Add or Change Direct Deposit

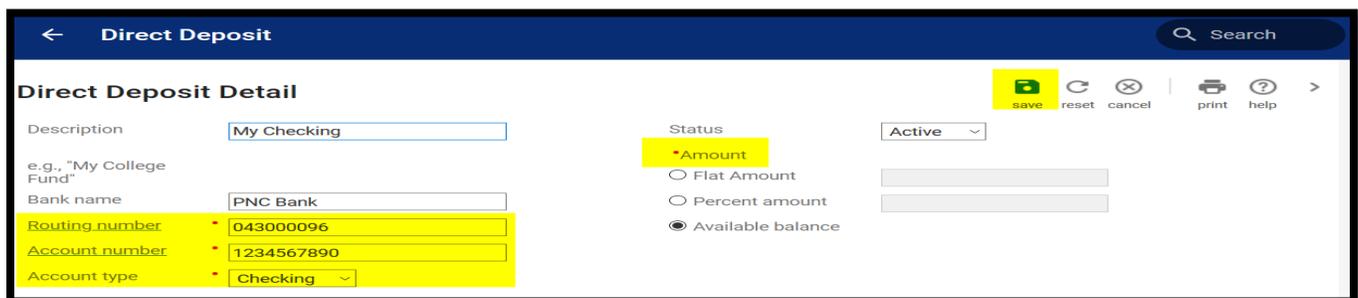
From the Home Screen, select Menu > Myself> Direct Deposit. If the Quick Link has been added to the dashboard, you can click it.



Click the 'Add' button to add a new account or click on Change Direct Deposit under the Things I Can Do section.



All fields that show a red dot indicator are required fields and must be filled in.



Update fields as needed and 'Save'.

You must click 'Submit' before the change will be added.

Note: All changes will be in Pending status until approved by either HR or payroll. You may be required to submit supporting documentation before the change becomes effective. You will be notified if needed.

Verify that your banking information (name on the account, name of the bank, bank routing number, and account number) is accurate. The first check will be deposited into your account.

Inactivate a Direct Deposit

Select Menu > Myself > Pay > Direct Deposit.

1. From the Direct Deposit Summary page, select the account hyperlink (blue account number).
2. Change the “status” from “active” to “inactive”.
 - Note: A correction should be made if this account was set to “available balance,” which indicates that the full deposit amount or all remaining funds (net pay) was going to this account. Another account should be selected to be the “available balance” account. This will prevent a paper check from being issued. Paper checked will require it to be mailed to your home address which may delay you receiving your funds on the expected pay date.
3. Select Save
4. Select Submit

Account Type	Amount
Percentage Account 1	80%
Percentage Account 2	10%
Available Balance Account	Any remaining amount

Employee bank info: ⓘ

Description:

e.g., "My College Fund"

Bank description:

Routing number:

Account number:

Account type:

Status: Active
Inactive

*Amount:

Flat Amount

Percent amount

Available balance

Archive a Direct Deposit Account

**Direct Deposit that are “archived” cannot be reactivated or edited.
This account will only be viewable.**

From the Home Screen, select Menu > Myself > Pay > Direct Deposit.

1. From the Direct Deposit Summary page, select the check box next to the account.
2. Select 'Archive'
3. Select 'OK' in the confirmation dialog box (“Would you like to archive this selected record?”).
4. Select Submit.
5. Status of the account is now 'Archived'.

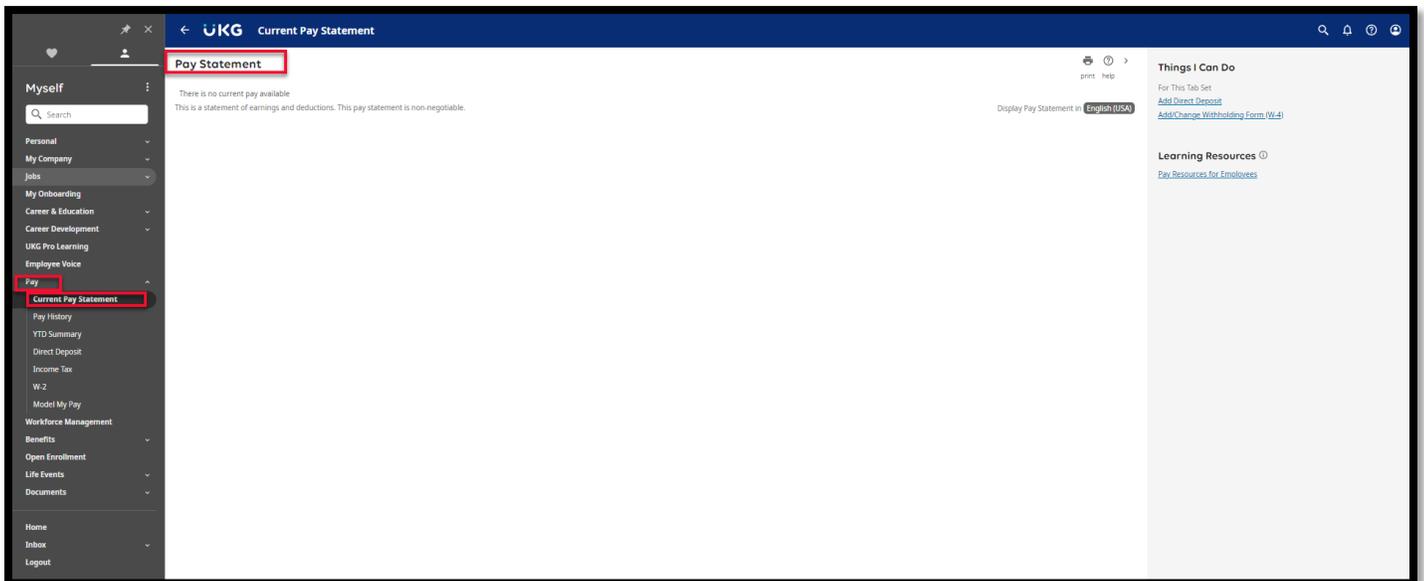
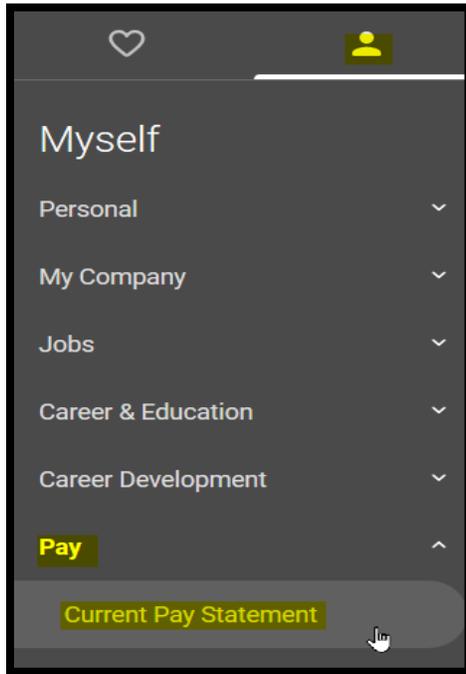
← UKG

Direct Deposit Summary add archive print help >

Account Number	Bank	Account Type	Amount	Status
<input checked="" type="checkbox"/> xxxxxxxxxxxxxxxxxxxx9248	Uti Credit Union	Checking	Available balance	Active

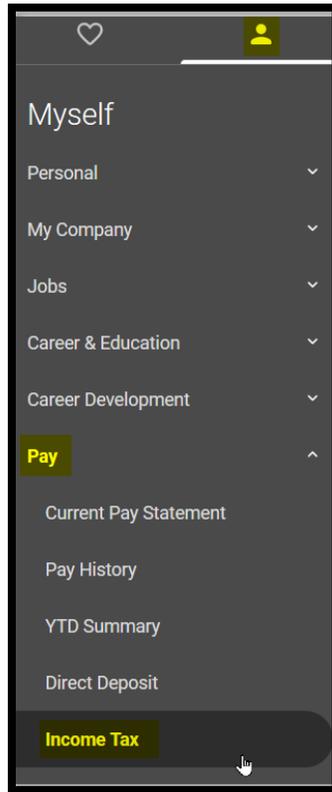
View Your Pay Statement

From your home page, select Myself > Current Pay Statement.

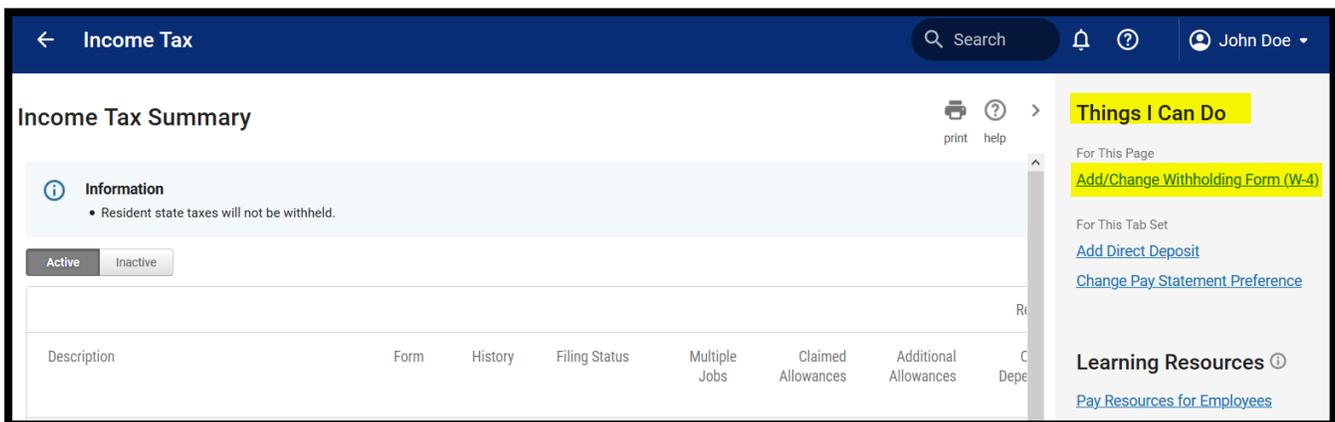


Add or Change Personal Income Tax Withholding

From the Home Screen, select **Myself > Pay > Income Tax**. If the Quick Link has been added to the dashboard, you can click it.



Click on the **Add / Change Withholding Form (W-4)** in the Things I Can Do section.



You will be presented with the Federal and State forms that you can click on and use to update your withholding information. To update your State withholding, click on the W-4 form link for your State.

Income Tax Search

Withholding Forms (W-4)

back print help

Add/Change Withholding Form (W-4)

Description	Form
Federal	<ul style="list-style-type: none"> Employee's Withholding Certificate (W-4) Certificado de Retenciones del Empleado (W-4(SP)) Employee's Withholding Certificate (W-4 (Non-Resident Alien))
New York	New York (IT-2104)
Pennsylvania	PA Residency Certification Form (CLGS-32-6)

Changing your State Withholding

If you want to view the State Instructions to complete the form, click on the Full Instructions link (highlighted in yellow). Fill out the fields on the page. The fields with a red dot are required to be completed. Click the NEXT button on the top right on the page to continue. Your State form may look different than the example below. Follow your State form instructions.

Withholding - New York next cancel help

New York Tax Form DE 4

[Full Instructions](#)

*** Filing Status**

Single or Married (with two or more incomes)
 Married (one income)
 Head of Household

*** Allowances**

Test Total Number of Allowances you're claiming (Use [Worksheet A](#) for regular withholding allowances. Use other worksheets as applicable, [Worksheet A+B](#)).

For your changes to go into effect, you will have to click in the box to certify that this change is a valid allowance. Then you must click the Sign and Save button. You will be able to see and copy of the form below that shows your updates.

Withholding - Pennsylvania cancel help

Pennsylvania Residency Certification Form

Under penalties of perjury, I declare that I have examined this information, including all accompanying schedules and statements and to the best of my belief, they are true, correct and complete.

[Sign & Save](#)

Changing your Federal Withholding

If you want to update your Federal withholding, from the Income Tax page, click on the Employee's Withholding Allowance Certificate W-4 link. You may see instructions to complete the form by clicking on the Full Instructions link (highlighted in yellow). Fill out the fields on the page. The fields with a red dot are required and must be completed. Click the NEXT button on the top right on the page to continue.

Withholding - Federal next cancel help

Federal Tax Form W-4

[Full Instructions](#)

*** Are your paychecks subject to Federal income tax?**
 You can only select No if both of the following are true:
 - Last year no Federal taxes were withheld from my paycheck
 - This year no Federal taxes should be withheld from my paycheck

Yes
 No

*** Step 1: Personal Information - Filing Status**

Single or Married filing separately
 Married filing jointly (or Qualifying widow(er))
 Head of household (Select only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual)

*** Step 2: Do you hold more than one job at a time?**

Yes
 No

Step 3: Claim Dependents
 Is your income \$200,000 or less?

Yes
 No

For your changes to go into effect, you will have to click in the box to certify that this change is true, correct and complete. Then you must click the Sign and Save button. You will be able to see and copy of the form below that shows your updates.

Withholding - Federal

 |

Federal Tax Form W-4

Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete.

Sign & Save

Page: 1 of 4
Automatic Zoom

Form W-4

Department of the Treasury
Internal Revenue Service

Employee's Withholding Certificate

▶ Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.
▶ Give Form W-4 to your employer.
▶ Your withholding is subject to review by the IRS.

OMB No. 1545-0074

2021

Step 1: Enter Personal Information	(a) First name and middle initial John	Last name Doe	(b) Social security number XXX-XX-6789
	Address 123 Main St		▶ Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov .
	City or town, state, and ZIP code New York, NY 10001		

If you wish to make changes, use the 'Back' button to go back to the previous screen. After you save, you will have an opportunity to review the summary of the information.

You must click 'Submit' before the change will be processed. If applicable, please choose the person who should approve your request if there is more than one person's name in the dropdown. Note: All changes will be in Pending status until approved by either HR or payroll.

Summary

You must select Submit to complete this request.

Comments

▼ **Request Information** Show

▼ **EmployeeWithholding**

	Before	Submitted
Income Tax	USFIT	USFIT
Filing status	Single/Married filing separately	Single/Married filing separately

Check Your Personal Information

We've updated your information based on the records we have on file. While we make every effort to ensure all information is correct, transferring data takes a great deal of work. We ask you to please check the following information your new UKG Pro employee record. Please make any changes by using the steps presented in this guide or contact your supervisor, HR or payroll contact for assistance.

- Personal information – address, phone number, social security number.
- Contacts – dependents, beneficiaries, and emergency contacts.
- Direct deposit.

If you need UKG Pro assistance, please submit a request <https://servicedesk.newstory.com>.

Access Mobile Application & Add Photo

The UKG Pro Mobile Application is enabled for all employees. Through the mobile application employees can view their inbox, news and information, the employee directory, pay information, benefits information and more!

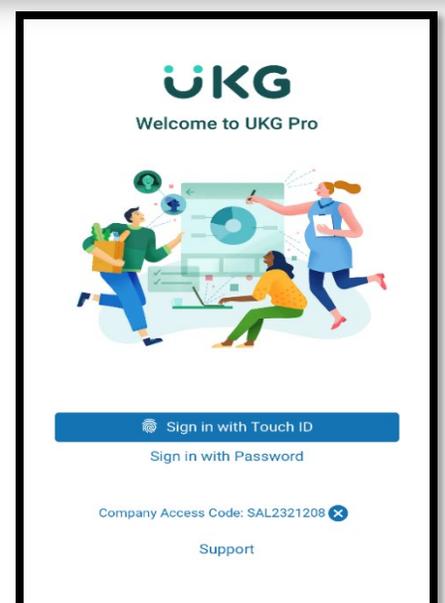
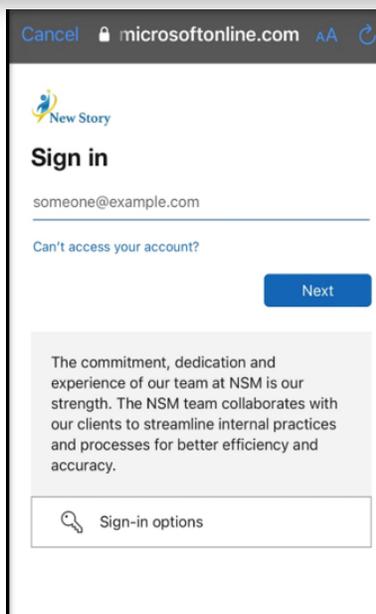
The mobile application also allows employees to add a professional photo to their employee profile, which will be visible in the mobile application and the web application to all staff. Employee photos can be viewed through the UKG directory or through the UKG organization chart. See instructions below.

Download the **UKG Pro Mobile App**  from the Apple or Google Play app stores.

Enter Our Company Code: SAL2321208

How to Login:

1. On the Sign In screen click "Use SSO (Corporate Credentials); this will open a new page with the Header 'New Story'.
2. Enter your Username (email address) and Password (Windows/Office 365 password; used to log into a computer).
3. After the initial log in you can elect to enable face ID, touch ID, and fingerprint login.

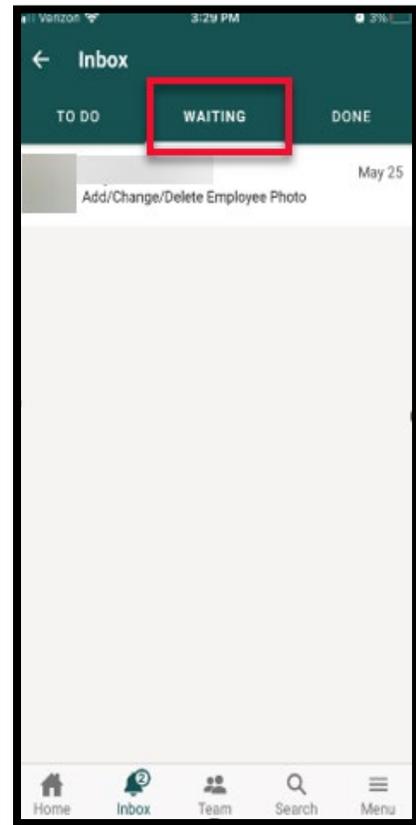
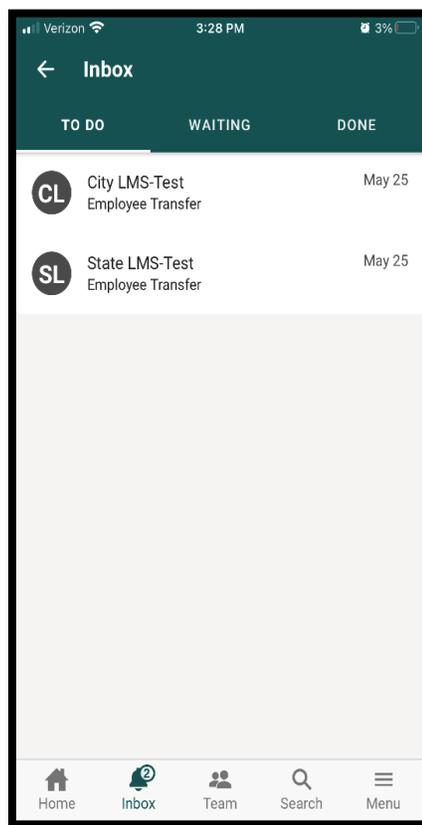
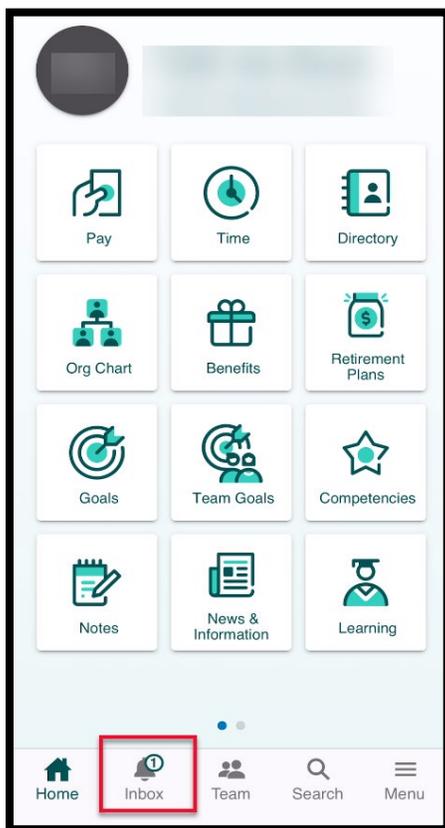


The UKG Pro Mobile App gives employees the ability to view the majority of the UKG features available in the UKG Pro web experience.

One of the most frequently accessed items is the employee inbox.

However, not everything available in the UKG web version is available on the app. You may still need to access UKG via the web to make changes to your record or information.

Access your UKG Pro Inbox to view any outstanding workflow request, request that require approval from others and request that have been completed.



Adding a Photo to UKG

To add your photo to your employee profile:

1. Click on your name and title, this will bring you to your employee profile.
2. Click on the empty employee photo box, and click edit.
3. Choose a professional photo that can be shared with your manager and co-workers.
4. After selecting your photo, your manager will receive a notification with your request to add a photo to your record.

