# Self-Service Checklist

*Revised: November 2010*

The Self-Service Checklist is used to assist the district in setting up Self-Service Demographic, Self-Service Payroll, and Self-Service approver access for employees though the Employee Access application.

## Security Administration Setup:

☐ 1. To set up access to the District EA Options table in Human Resources, go to the Security application, and on the Manage Users tab, find and edit existing district staff, or create a new user, if applicable.

☐ 2. Under **Manage Permissions**, verify that you have access to EA Self-Service Assignments under Human Resources, Tables.

☐ 3. To set up a district approver, under **Manage Permissions**, verify that you have access to Self-Service under Human Resources and to Self-Service Reports under Human Resources > Reports.

☐ 4. To set up a district approver to send and receive e-mail notifications, from the Manage Users tab, add the employee’s ID number to the user by clicking **Edit User** or **New User**.

**Notes:**

- If a district approver would like to receive an e-mail notification that a change is pending approval, the **Employee Nbr** field on the Edit User page in Security must be populated with the approver's employee number.
- If the employee number is typed in the **Employee Nbr** field, the approver’s name will display on the HRS8000 - Self-Service Report. If the **Employee Nbr** field is blank, the approver’s name will not display on the Self-Service Report (HRS8000)t.

## Human Resources Setup:

On the Tables > District EA Options page:

☐ 1. Under **Enable**, select **Self-Service Demographic** and **Self-Service Payroll**.

☐ 2. Under **Messages**, if the district wants to add a message to Self-Service Demographic and/or Self-Service Payroll, select the specific option, and then type the message in the text box that displays to the right of the option. The message will display on the appropriate page when the employee is logged on to the Employee Access, Self-Service application.

☐ 3. If the district uses the direct deposit prenote indicator, select **Set Prenote Indicator**.

☐ 4. Enter the number of direct deposit accounts that are allowed by the district. By default, the **Number of Direct Deposit Accounts Are Allowed** field is set to 0. If the field is set to 0, the employee will not be able to add any direct deposit bank accounts when logged on. However, he will be able to update any direct deposit bank accounts that already existed in his master record.

☐ 5. Click **Save**.

On the Tables > EA Self-Service Assignments > Demographic page:

☐ 1. In the **Option** field, select an option for each group. If N-None is selected, the category will not display for the employee in the Employee Access application.

- [ ] 2. In the **Approver ID** field, select an approver ID for each group.
- [ ] 3. Select **Doc Required** for each category that requires documentation.
- [ ] 4. Select **Required Field** if the employee is required to enter a value in this field.
- [ ] 5. Click **Save**.

On the Tables > EA Self-Service Assignments > Payroll page:

- [ ] 1. In the **Payroll** field, select the payroll frequency.
- [ ] 2. In the **Option** field, select an **Option** for each group. If N-None is selected, the category will not display for the employee in the Employee Access application.
- [ ] 3. In the **Approver ID** field, select an approver ID for each group.
- [ ] 4. Select **Doc Required** for each category that requires documentation.
- [ ] 5. Select **Required Field** if the employee is required to enter a value in this field.
- [ ] 6. Click **Save**.
- [ ] 7. Repeat the process for each applicable pay frequency.

On the Maintenance > Staff Demo page:

- [ ] 1. Verify that the **Work E-mail** field for the approver contains a valid e-mail address.