CrossPointe.net Employee Portal User Guide

For Employees

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Every effort has been made to ensure that this documentation is complete and accurate. However, note that the programs may have changed slightly between the time the manual was printed and the product was released. These changes will not in any way interfere with your use of the product.

Overview

The CrossPointe.net Employee Portal provides direct, secure access to essential information so that employees can stay informed.

Key features of the Employee Portal include:

- Secure, password-protected access to employee information via the Internet.
- Direct access to payroll history, reimbursements and qualifications.
- Immediate access to W2 Forms.
- Information regarding employee's time and attendance through the last payroll run.
- On-line check simulator which allows employees to see the impact on their net pay when considering changes to their account such as withholding allowances or voluntary deductions.

What's Inside

This user guide provides all the instructions employees need to access and manage their information. Instructions for performing different Portal tasks, such as logging into the Portal, what to do when you forget your password and checking payroll and benefits are included.

Logging In to the Portal

Follow the step below to access the Employee Portal:

- Start your Internet browser.
- Go to the District's web page at www.sarasotacountyschools.net.
- Click on the heading titled "Employees" along the top banner.
- From the list displayed down the center of the page select the link "Employee Portal" (The portal URL can also be typed directly into the address bar of the web browser:

  https://ep.sarasotacountyschools.net/

  Save this link as a favorite in the web browser for quick and easy access to the sign on screen).
- The following screen is displayed on the user's computer:

- Enter your User ID which will be your Employee A# and press the Tab key.
- Enter your PIN which will be the last four digits of your social security number. Note: To reduce the number of passwords an employee needs to remember, you may also enter your School Board network password, if you have one, either is acceptable. Click the Sign-in button.
- The first time you sign into the Employee Portal, you will be asked to accept the "Terms of Use" agreement. This agreement defines the purpose and uses of the portal and the payroll documents that will now be delivered to you electronically.
- Once you have accepted the Terms of Use, you can begin navigating through the system.

Changing Your PIN

Follow the steps below to change your Employee Portal PIN (does not apply to your School Board network password):

- After logging in, select the "Profile" box from the navigation bar on the left hand side of the screen.
- From the dropdown menu that displays select "Reset PIN." •   The following screen is displayed on the user's computer:

- In the first box enter your old PIN and press the Tab key. If this is the first time you are changing our PIN, enter the last four digits of your social security number.

- In the next box enter your new PIN and press the Tab key. Your PIN can be either alpha or numeric characters. Your PIN is case sensitive and must be a minimum of 4 characters and no more than 20 characters in length.

- In the next box re-type your new PIN. Select the Save box on the right hand side of the screen.

- If your PIN has been changed, you will receive a "Save Successful" notification. If a problem occurs, an error notification will be displayed on the screen. Make any necessary corrections and select the Save box. If an error message continues to occur, please contact the IT Help Desk for assistance at 941-861-HELP (4357) or Extension 44357 or by e-mail at help@sarasotacountyschools.net .

Forgot Your PIN/Password?

Follow the steps below if you forget your password and would like to request it to be reset:

- When you arrive at the main Log In page of the Employee Portal, the following screen is displayed.

- Click **Forgot Password**

    The Portal display changes to the following dialog box:

- Enter your Employee SSN and press the Tab key.

- Enter the e-mail address that is included on your employee profile and click the Submit button.

- The portal will verify that the Employee SSN and e-mail address are associated with the same employee profile on record in the Crosspointe Human Resources database. If both items agree to the database, an e-mail will be sent to the employee with their password/PIN.

- Check your email to retrieve your password, and use it to sign on to the Portal.

- If both items do not agree try re-entering the information. If you are unable to reset your password or there is no e-mail address on file, the password will need to be reset by the IT Help Desk. Please contact the IT Help Desk for assistance at 941-861-HELP (4357) or Extension 44357 or by e-mail at help@sarasotacountyschools.net. In addition, please contact the Human Resources Department at 927-9000 ext.31200 to have your employee profile information updated to include your e-mail address.

Navigating the Portal

Once you have successfully logged onto the Portal, the first screen that is displayed is the employee's attendance calendar. Here you can quickly view at-a-glance the days you have taken off during the year and your available leave balances.

Below is a list of the currently available menu items to select from once you are in the portal. These are located on the left hand side of the screen and remain visible on every display available in the portal for ease of navigation through the system. It is our plan to expand the list of menu items in the future to include timesheets, interactive forms and change requests and annual benefit open enrollment. Each

menu item in white lettering is available for expansion for additional menu options. A description of each menu category is provided on the next few pages.

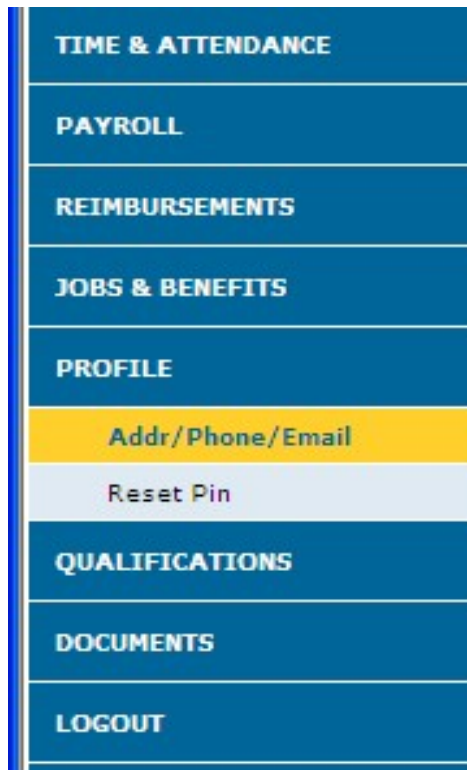| Menu	Options
Time & Attendance	**Attendance** Displays a calendar view of employee's attendance for the selected year, with a summary of the days earned, used, requested, and the remaining balance for each absence category. **Time Worked** Displays the employee's processed timesheets for additional hours worked outside of the normal duty day based on the selected year. Time, rate and pay amounts displayed include contracted services, extra duty days, straight time (ST) overtime and time and half (1H) overtime.

Menu	Options
Payroll	**Paycheck History** Displays an employee's check(s) paid in the selected year. Once a check is selected, the user can view and/or print the selected check details. **Withholdings (W4)** Displays the employee's Federal and State tax filing information. **Direct Deposit** Displays the last four digits of an employee's bank routing and account number. The account information displayed on this screen is only for the financial institution receiving your net pay amount. If you deposit your pay into multiple accounts, the other deposit amounts are reflected in the Benefits and Deductions area of the Jobs and Benefits menu. **Check Simulation** Displays employee's checks paid for the current year. Once a check is selected, the user can add, adjust or remove different payroll fields such as filing status, deduction amounts, allowances, etc. The user can then calculate their projected net pay based on these adjustments. **W2 Forms** Displays a PDF copy of the Employee's Form W2.

Menu	Options
Reimbursements	**Reimbursements** Displays employee expense reimbursement details based on the selected year.

Menu	Options
Jobs & Benefits	**Current Positions** Displays information on all employee primary and secondary jobs held during the current fiscal year. **Benefits & Deductions** Displays information on an employee's mandatory and voluntary deductions and employer paid benefits. Additional direct deposit amounts other than net pay are also reflected on this menu display.

Menu	Options
Profile	**Addr/Phone/Email** Displays an employee's mailing address and contact information. Please review this information and complete a change of address form if information is missing or changes are required. Also, please add a contact e-mail address, if you have one. If you forget your PIN, this is the quickest way to receive your information. If an e-mail address is not on file, the only way to Reset your PIN is through the IT Help Desk. **Reset Pin** Allows the employee to change their current PIN. The new PIN will take effect the next time you login. This menu item will only show up in the drop down menu if you logged into the portal using a PIN. If you log in using your network password, the menu item is not visible because your network password cannot be changed through the portal.

Menu	Options
Qualifications	**Certifications** Displays the list of certificates on file for instructional employees including dates of issuance and expiration. **Education** Displays an employee's educational background. If any information is missing, please contact Human Resources to have your information updated and/or corrected.

Menu	Options
Documents	Displays a list of frequently used employee documents and forms that are available for download.

Logging Off the Portal

Follow the steps below to end your session and log off the Portal:

- From any screen display in the portal (an example is shown below), click **Logout,** which appears both in the top right of the screen and as the last menu item along the left hand side of the page.

- The Portal ends your session and redisplays the Sign-In dialog box.

- For security reasons, it is recommended that you also close your Internet browser.