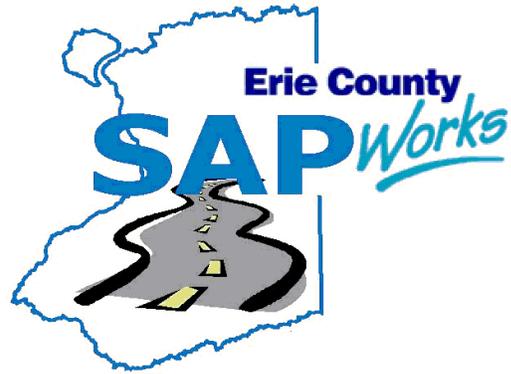




County of Erie



County of Erie

CHANGE PERSONAL INFORMATION

INTERNAL USE ONLY

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1. Overview

1.1. Purpose

The purpose of this document is to provide instructions to Erie County employees on how to enter personal information into Employee Self Service (ESS).

1.2. Maintenance

The County of Erie Department of Information & Support Services is the custodian of this document and responsible for its maintenance.

1.3. Revision History

Revision	Date	Comments
1.0	6/6/2011	Initial Publication

2. Background

The County of Erie DISS moved toward the implementation of Employee Self Service (ESS). This system allows employees to view and edit some personal information directly onto SAP.

3. Role Definitions

Role	Description
Employees	Employees in Erie County.

4. Ensuring Data Consistency

The previous process for changing this information was accomplished by notifying either departmental Personnel administrators or the Personnel department of these changes. Now employees will have the ability to view or change (where permissible) the information themselves by using Employee Self Service.



5. Log on/ Log off ESS system

To update Employee Personal data, the employee must first log on to ESS system. Log on using your User ID and Password, then click on "Log on" button.

Select the "My Personal Information" option.



County of Erie

From this screen, you can select Addresses, Bank Information, or Family Member/Dependent information. Each selection is covered in the following sections of this manual.

To exit this process, select the Logout option at top right corner of this screen.

The screenshot displays the 'Employee Self-Service' portal for user Lori Stilwell. The page has a blue header with 'Welcome Lori Stilwell' on the left and 'Help Log' on the right. Below the header is a search bar with 'Search' and 'Advanced Search' buttons. A navigation menu includes 'Employee Self-Service' and 'Learning'. A secondary menu lists 'Overview', 'Employee Search', 'Working Time', 'My Benefits and Payments', and 'My Personal Information'. The main content area is titled 'Personal Information' and includes a 'History' link. Under 'My Personal Information', there are three sections: 'Addresses' (with a sub-link 'Enter, change, or delete your address.'), 'Bank Information' (with a detailed warning about payment methods), and 'Family Member/Dependents' (with a warning about benefit plan changes).



6. Update Addresses

To view or change addresses, click on "Address" option.

The screenshot shows the Employee Self-Service portal interface. At the top, there is a navigation bar with the text "Welcome Lori Stilwell" on the left and "Help Log" on the right. Below this is a search bar with the text "Search Advanced Search". The main navigation area includes "Employee Self-Service" and "Learning" tabs, followed by a menu with "Overview", "Employee Search", "Working Time", "My Benefits and Payments", and "My Personal Information". The "Personal Information" section is active, with a "History" link and a "Back" button. The "My Personal Information" section contains several links: "Addresses" (circled in red), "Bank Information", and "Family Member/Dependents". Each link is followed by a brief description of the information it manages.

Employee Self-Service Learning

Overview | Employee Search | Working Time | My Benefits and Payments | My Personal Information

Personal Information | History | Back

My Personal Information

[Addresses](#)
Enter, change, or delete your address.

[Bank Information](#)
Enter, change, or delete your banking information. Please note that selecting PY Bank transfer ECMC or PY Check ECMC as your payment method when editing or entering new bank information will result in either no or incorrect payment. Please review your changes before you save them.

[Family Member/Dependents](#)
Enter, change or delete information about your family members or dependants.
Please note that adding or deleting a dependant here will not automatically result in changes to benefit plans.
Contact Personnel department if you wish to make changes to your benefit plans.



This screen will display Permanent Residence and Emergency contact address information. To change this data, click on "Edit" button under the item you wish to change.

Note: Your W2 will be sent to the address listed as "Permanent residence"

Welcome Lori Stüwell Help Log

Search [Advanced Search](#)

Employee Self-Service **Learning**

Overview | Employee Search | Working Time | My Benefits and Payments | My Personal Information | History [Back](#)

Addresses

1 2 3 4

Overview Edit Review and Save Confirmation

Permanent residence

Street Address: 95 Franklin St
City: Buffalo
Telephone No.: 858-6715

[Edit](#)

Emergency address

Street Address: 95 Franklin St
City: Buffalo
Telephone No.: 858-6715

[Edit](#)

[Previous Step](#) [Exit](#)



For example, if I click on "Emergency Address", this data is shown.

All of the data below can be updated. You must decide when this change will take effect, by selecting the "valid from today" or "valid from" option. If you choose a "valid from" option, you will be directed to enter a date (date in the future). If the information looks complete, click on the "Review" button to see next screen.

Welcome Lori Stowell [Help](#) [Log](#)

Search [Advanced Search](#)

Employee Self-Service [Learning](#)

[Overview](#) | [Employee Search](#) | [Working Time](#) | [My Benefits and Payments](#) | [My Personal Information](#) | [History](#) [Back](#)

Addresses

1 Overview 2 **Edit** 3 Review and Save 4 Confirmation

Emergency address

Country:

Co:

House Number and Street:

Address Line 2:

City:

County:

State:

ZIP Code:

Telephone:

Valid from Today
 Valid from

[Previous Step](#) [Review](#) [Exit](#)



Review the changes you made, and if satisfied, click the "Save" button, to see next screen. If not, click "Previous Step" to go back to last screen, or "exit" to leave the Personal Information update process.

The screenshot shows a web application interface for an employee named Lori Stilwell. The top navigation bar includes 'Welcome Lori Stilwell', a search box, and 'Help Log'. Below this is a menu for 'Employee Self-Service' with sub-menus for 'Learning', 'Overview', 'Employee Search', 'Working Time', 'My Benefits and Payments', and 'My Personal Information'. The main content area is titled 'Addresses' and features a progress indicator with four steps: 1. Overview, 2. Edit, 3. Review and Save (highlighted in a red circle), and 4. Confirmation. Below the progress indicator, the text reads 'Verify the Address data below' and 'Emergency address'. The address details are as follows:

Country:	USA
c/o:	ESS TRAINER, Sr.
House Number and Street:	95 Franklin St
Address Line 2:	
City:	Buffalo
County:	Erie
State:	New York
ZIP Code:	14202
Telephone:	716 858-2318

Valid from 6/2/2011

At the bottom of the form, there are three buttons: 'Previous Step', 'Save' (circled in red), and 'Exit'.



Choose what you want to do next. For this example, if you "Go to my personal information page", and then select "addresses" again, you will see this screen. It will show the changes just made today. You will have until the end of the day that the change is scheduled to take effect to delete the update, by clicking on "delete".

To navigate back to My Personal Information, click on "Exit" button here.

Welcome Lori Stüwell

Search [Advanced Search](#)

Employee Self-Service [Learning](#)

Overview | Employee Search | Working Time | My Benefits and Payments | My Personal Information

Addresses

1 Overview 2 Edit 3 Review and Save 4 Confirmation

Permanent residence

Street Address: 95 Franklin St
City: Buffalo
Telephone No.: 858-6715
[Edit](#)

Emergency address

Valid from Today
Street Address: 95 Franklin St
City: Buffalo
Telephone No.: 858-2318
[Edit](#) [Delete](#)

[Previous Step](#) [Exit](#)



7. Update Bank Information

To view or update Bank information, select "Bank information".

The screenshot shows the Employee Self-Service portal for Lori Stilwell. The navigation bar includes "Employee Self-Service" and "Learning". The main menu has "Overview", "Employee Search", "Working Time", "My Benefits and Payments", and "My Personal Information". The "Personal Information" section is active, showing a "History" link and a "Back" button. Under "My Personal Information", there are three links: "Addresses", "Bank Information", and "Family Member/Dependents". The "Bank Information" link is circled in red. Below each link is a brief description of the function.

Welcome Lori Stilwell [Help](#) [Log](#)

[Search](#) [Advanced Search](#)

Employee Self-Service [Learning](#)

[Overview](#) | [Employee Search](#) | [Working Time](#) | [My Benefits and Payments](#) | [My Personal Information](#)

Personal Information | [History](#) [Back](#)

My Personal Information

[Addresses](#)
Enter, change, or delete your address.

[Bank Information](#)
Enter, change, or delete your banking information. Please note that selecting PY Bank transfer ECMC or PY Check ECMC as your payment method when editing or entering new bank information will result in either no or incorrect payment. Please review your changes before you save them.

[Family Member/Dependents](#)
Enter, change or delete information about your family members or dependants.
Please note that adding or deleting a dependant here will not automatically result in changes to benefit plans.
Contact Personnel department if you wish to make changes to your benefit plans.



Everyone will have one "Main bank". This main bank is your default bank. Any "Other bank" listed will handle additional specific amounts to be directly deposited into a bank account, or printed as a check.

This screen shows overview of the current bank information. This example shows direct deposit accounts for 2 banks, one is listed as main bank, and there shows one "other bank". There may be several or no "other banks".

The "other bank" has an edit and delete button. There is also a button to add a new "other bank". If this other bank is deleted, in this case for example, the net pay would go to the main bank by default.

For this example, we will add a "new other bank".

Welcome Lori Stilwell

Search Advanced Search

Employee Self-Service Learning

Overview | Employee Search | Working Time | My Benefits and Payments | My Personal Information

History Back

Bank Information

1 Overview 2 Edit 3 Review and Save 4 Confirmation

Main bank

Payee: Trainer ESS
Bank Name: HSBC
Account Number: 987654321

Edit

Other bank

Valid from Today

Payee: Trainer ESS
Bank Name: SEFCU
Account Number: 123456789

Edit Delete

New Other bank

Previous Step **New Other bank** Exit



I add "new other bank" with payment method of "PY-bank transfer (direct deposit)" and enter value \$80. It is not recommended to use percentage calculation.

You will enter the bank number and account number for this "other bank". Bank number is the routing number of the bank.

If you are using a checking account, you can find your routing number and account number on a check. If you are using a savings account, ask your bank for the routing number. You should verify the routing number with your bank. If you get an error after entering your correct routing number, it may not exist in the system and you should contact the department's personnel administrator or central payroll department.

You should indicate checking or savings (selecting "none" defaults to checking account).

You must choose when this is to become effective and when it will end (if I only want this in effect for a limited time). All dates entered must be dates in the future.

Once change becomes effective, there will be a direct deposit or \$80 created and the remainder will be distributed to main bank and other bank as entered.

Bank Information

1 Overview 2 **Edit** 3 Review and Save 4 Confirmation

Other bank

Country: USA

Payee: Trainer ESS

City: Buffalo

ZIP Code: 14202

Bank Number: 221373383

Account Number: 123456789 Checking Savings None

Payment Method: PY Bank tra...

Purpose:

Currency: USD

Standard Percentage: 0

Or

Default Value: 80.00

Valid from Today
 Valid from
 Validity Period

Previous Step **Review** Exit

See next page for explanations on drop-down boxes.



This screen shows the information that will be displayed if you click on the box next to "Bank Number". This is the bank routing number. This additional screen will let you search for information for your bank. You do not need this if you know the routing number of your bank.

Welcome Lori Stowell Help Log

Search [Advanced Search](#)

Employee Self-Service [Learning](#)

Overview | Employee Search | Working Time | My Benefits and Payments | My Personal Information History Back

Bank Information

1 Overview 2 **Edit** 3 Review and Save 4 Confirmation

Other bank

Country: USA

Payee: Trainer ESS

City: Buffalo

ZIP Code: 14202

Bank Number: 021313103

Account Number:

Payment Method: Bank Key: Bank name:

Purpose: City: Bank Branch:

Currency: Bank number: Bank Country: US

Standard Percentage: [Go](#) [Exit](#)

Or

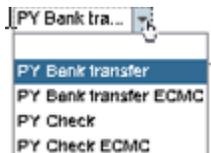
Bank number	SWIFT code	City	City	Name of bank	House number and street

Default Value:

Valid from Today
 Valid from
 Validity Period

[Previous Step](#) [Ret](#)

If you click on the arrow next to Payment Method, you will see a "drop down" selection to choose from. The only options which you should select are "PY bank transfer" and "PY check". The ECMC options should not be selected. "PY Bank transfer" will create a direct deposit amount; "PY Check" will create a paper check.





When you have all information entered, click on "Review" and then "Save".

Welcome Lori Stilwell [Help](#) [Log](#)

Search [Advanced Search](#)

Employee Self-Service [Learning](#)

[Overview](#) | [Employee Search](#) | [Working Time](#) | [My Benefits and Payments](#) | [My Personal Information](#) | [History](#) [Back](#)

Bank Information

1 Overview 2 **Edit** 3 Review and Save 4 Confirmation

Other bank

Country:

Payee:

City:

ZIP Code:

Bank Number:

Account Number: Checking Savings None

Payment Method:

Purpose:

Currency:

Standard Percentage:

Or

Default Value:

Valid from Today
 Valid from
 Validity Period

[Previous Step](#) [Review](#) [Exit](#)



You will see the note "The changes you made to your Bank data were saved".
Choose what you want to do next. In this example we "go to my personal information" and
then choose "bank information".

Welcome Lori Stowell

Search Advanced Search

Employee Self-Service Learning

Overview | Employee Search | Working Time | My Benefits and Payments | My Personal Information

History Back

Bank Information

1 Overview 2 Edit 3 Review and Save 4 Confirmation

The changes you made to your Bank data were saved

What do you want to do next?

- [Go to Bank Information Overview](#)
- [Go to My Personal Information homepage](#)
- [Go to Employee Self-Services homepage](#)

Other bank

Country:	USA
Payee:	Trainer ESS
City:	Buffalo
ZIP Code:	14202
Bank's American Bankers' Association Number:	221373383
Bank Account Number:	123456789
Account Type:	
Payment Method:	PY Bank Transfer
Purpose:	
Currency:	USD
Standard Percentage:	0
Default Value:	80.00

Valid from 6/2/2011 to 6/30/2011



This screen shows the current bank information.

If you chose to receive a check for all or part of your payment, please ensure the payment method is PY Check. Selecting any other payment method may result in no or incorrect payment.

In the example below, the 1st "Other bank" is a printed paper check. You can see this because there is no bank name listed.

Click on "Edit" to change any of the information.

Welcome Lori Stilwell [Search](#) [Advanced Search](#) [Help](#) [Log](#)

Employee Self-Service [Learning](#)

[Overview](#) | [Employee Search](#) | [Working Time](#) | [My Benefits and Payments](#) | [My Personal Information](#) | [History](#) [Back](#)

Bank Information

1 Overview 2 Edit 3 Review and Save 4 Confirmation

Main bank

Payee: Trainer ESS
Bank Name: HSBC
Account Number: 987654321
[Edit](#)

Other bank

Valid from 6/2/2011 to 6/30/2011	Valid from Today
Payee: Trainer ESS	Payee: Trainer ESS
Bank Name:	Bank Name: SEFCU
Account Number:	Account Number: 123456789
Edit Delete	Edit Delete
New Other bank	

[Previous Step](#) [New Other bank](#) [Exit](#)



For this example, I will leave payment method "PY check" (printed paper check), and enter value \$50. It is not recommended to use percentage calculation. Once change becomes effective, there will be a paycheck for \$50 generated and the remainder will be distributed to main bank and other bank as entered. You must choose when this change is to become effective and when it will end (if I only want this in effect for a limited time). All dates entered must be dates in the future. After all data is entered, click "review" to make sure it has been entered accurately.

Welcome Lori Stilwell [Help](#) [Log](#)

[Search](#) [Advanced Search](#)

Employee Self-Service [Learning](#)

[Overview](#) | [Employee Search](#) | [Working Time](#) | [My Benefits and Payments](#) | [My Personal Information](#) | [History](#) [Esc](#)

Bank Information

1 Overview 2 **Edit** 3 Review and Save 4 Confirmation

Other bank

Country:

Payee:

City:

ZIP Code:

Bank Number:

Account Number: Checking Savings None

Payment Method:

Purpose:

Currency:

Standard Percentage:

Or

Default Value:

Valid from Today
 Valid from
 Validity Period

[Previous Step](#) [Review](#) [Exit](#)



When changes are reviewed, click on "save" to update the information.

Welcome Lori Stilwell Help Log

Search [Advanced Search](#)

Employee Self-Service **Learning**

Overview | Employee Search | Working Time | My Benefits and Payments | My Personal Information | History, [Back](#)

Bank Information

1 Overview 2 Edit **3 Review and Save** 4 Confirmation

Verify the Bank data below

Other bank

Country:	USA
Payee:	Trainer ESS
City:	Buffalo
ZIP Code:	14202
Bank's American Bankers' Association Number:	
Bank Account Number:	
Account Type:	
Payment Method:	PY Check
Purpose:	
Currency:	USD
Standard Percentage:	0
Default Value:	50.00

Valid from 6/2/2011 to 5/30/2011

[Previous Step](#) **Save** [Exit](#)



You will see the note “The changes you made to your Bank data were saved”.

The screenshot shows the 'Employee Self-Service' portal for user 'Lori Stilwell'. The navigation bar includes 'Overview', 'Employee Search', 'Working Time', 'My Benefits and Payments', and 'My Personal Information'. The 'Bank Information' section is active, with a progress indicator showing four steps: 1. Overview, 2. Edit, 3. Review and Save, and 4. Confirmation (highlighted in yellow). A green notification box states: 'The changes you made to your Bank data were saved'. Below this, there are links for 'What do you want to do next?' including 'Go to Bank Information Overview', 'Go to My Personal Information homepage', and 'Go to Employee Self-Services homepage'. The 'Other bank' details are as follows:

Country:	USA
Payee:	Trainer ESS
City:	Buffalo
ZIP Code:	14202
Bank's American Bankers' Association Number:	
Bank Account Number:	
Account Type:	
Payment Method:	PY Check
Purpose:	
Currency:	USD
Standard Percentage:	0
Default Value:	50.00

Valid from 6/2/2011 to 6/30/2011

If you have any difficulty accessing any service please call helpdesk at 858-6715.



8. Update Family Member/Dependents

To select this option, click on "Family member/dependents".

The screenshot displays the Employee Self-Service interface for user Lori Stüwell. The page title is "Personal Information" and it includes a navigation menu with options like "Overview", "Employee Search", "Working Time", "My Benefits and Payments", and "My Personal Information". The main content area is titled "My Personal Information" and lists several options: "Addresses", "Bank Information", and "Family Member/Dependents". The "Family Member/Dependents" link is circled in red. Below this link, there is a warning: "Please note that adding or deleting a dependant here will not automatically result in changes to benefit plans. Contact Personnel department if you wish to make changes to your benefit plans."



Here, you can view or change information about spouse and children. For this example, we click on "New Spouse".

The screenshot displays the 'Employee Self-Service' portal for user 'Lori Stowell'. The page title is 'Family Member/Dependents'. A progress bar at the top shows four steps: 1. Overview (highlighted), 2. Edit, 3. Review and Save, and 4. Confirmation. Below the progress bar, a navigation menu contains the following options: 'Previous Step', 'New Spouse' (circled in red), 'New Divorced spouse', 'New Child', 'New Stepchild', and 'Exit'. The main content area below the menu is currently blank.



There are many fields available to input, you will have to scroll down on the screen to see them all. The only required field is first name, last name, and gender. This information does not update any W4 or insurance information. Click Review when data has been added.

Welcome Lori Stilwell [Search](#) [Advanced Search](#) [Help](#) [Log](#)

Employee Self-Service Learning

[Overview](#) | [Employee Search](#) | [Working Time](#) | [My Benefits and Payments](#) | [My Personal Information](#) | [History](#) [Bac](#)

Family Member/Dependents

1 Overview 2 **Edit** 3 Review and Save 4 Confirmation

Name
First Name: * _____
Last Name: * ESS _____
Other Title: _____

Data at Birth
Date of Birth: _____
Name at Birth: _____
Gender: Male Female

Other Personal Data
Social Security Number: _____
Nationality: _____
Second Nationality: _____
Third Nationality: _____
Reference Personnel Number: _____

Address
Street and House Number: _____



Welcome Lori Stilwell Help Log

Search [Advanced Search](#)

Employee Self-Service **Learning**

[Overview](#) | [Employee Search](#) | [Working Time](#) | [My Benefits and Payments](#) | [My Personal Information](#) | [History](#) [Back](#)

State:

ZIP Code:

Country:

Telephone: 000

Physicians

Physician 1:

ID Number:

Physician 2:

ID Number:

Status and Challenge

Status: Student
 Medicare
 Smoker
 Military Service
 Financially Independent

Challenge

Disability Date:

Notification Date:

Valid from Today
 Valid from
 Validity Period

[Previous Step](#) [Review](#) [Exit](#)



After reviewing the data, you can select "Save" to update the information. You will then see screen below. There is a note "The changes you made to your Family Member data were saved".

From here you can select where you want to go next. For this example, we select "Family Members / Dependents Overview".

The screenshot shows the Employee Self-Service interface. At the top, there is a navigation bar with "Employee Self-Service" and "Learning" tabs. Below this is a menu with "Overview", "Employee Search", "Working Time", "My Benefits and Payments", and "My Personal Information". A "History" link is visible on the right. A red oval highlights a green message box that says "The changes you made to your Family Member data were saved". Below the message is a "What do you want to do next?" section with a link to "Go to Employee Self-Services homepage". The main content area displays personal information for an employee named Mr. ESS, including fields for Name, Data at Birth, Other Personal Data, and Address.

Welcome Lori S Gilwell

Search Advanced Search

Employee Self-Service Learning

Overview | Employee Search | Working Time | My Benefits and Payments | My Personal Information

History Back

The changes you made to your Family Member data were saved

What do you want to do next?

[Go to Employee Self-Services homepage](#)

Name
First Name: Mr.
Last Name: ESS
Other Title:

Data at Birth
Date of Birth:
Name at Birth:
Gender: Male

Other Personal Data
Social Security Number:
Nationality:
Second Nationality:
Third Nationality:
Reference Personnel Number:

Address
Street and House Number:
Address Line 2:
City:
State:
ZIP Code:
Country:



You will then see the data you just entered. You can edit or delete this by selecting the appropriate option. You can also add new spouse or child from this screen. Click "Exit" to return to "My personal Information" screen.

Welcome Lori Stilwell [Help](#) [Log](#)

[Search](#) [Advanced Search](#)

Employee Self-Service [Learning](#)

[Overview](#) | [Employee Search](#) | [Working Time](#) | [My Benefits and Payments](#) | [My Personal Information](#) | [History](#) [Back](#)

Family Member/Dependents

1 **Overview** 2 Edit 3 Review and Save 4 Confirmation

Spouse

Valid from Today
First Name: Mr.
Last Name: ESS
Date of Birth:

[Edit](#) [Delete](#)

[Previous Step](#) [New Divorced spouse](#) [New Child](#) [New Stepchild](#) [Exit](#)

If you have any difficulty accessing any service please call helpdesk at 858-6715.