Overview

Employee Self Service (ESS) allows you to view payslips, leave balances and payroll information. You can also edit your personal and emergency contact details and access payslips.

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General Information

Every employee at UWA is allocated a unique, 8 digit employee number on the University’s Human Resource Information System (Alesco). This remains the same; no matter how many times the employee leaves and returns to the University.

However, each instance of employment at the University is allocated a job number. Different job numbers are allocated when the jobs are under different awards (i.e. academic, general, casual, etc), different classifications (i.e. different rate of pay) or in different departments.

Computer Requirements

ESS can be accessed from your work or home computer; you need access to the internet and a web browser. The vendors of the ESS software (Talent2 Works) has successfully tested the ESS with the following browsers - IE10.0, IE11.0, Firefox (32.0.3), Safari (7.0), Google Chrome (37.0). The ESS should also work with newer versions of Firefox and Google Chrome.

Helpful Hints

Employee Self Service Page: The URL below will take you to the Human Resources Employee Self Service page, which includes a help site providing further instructions and frequently asked questions (FAQs).

http://www.hr.uwa.edu.au/working/applications/ess

Passwords

It is important to not share your password with others, and, if prompted, do not save your password into your password list.

***** ALWAYS LOG OUT AFTER USING THE ESS *****

Closing the browser removes temporary cookies which could be used to gain access your account (this would have to be done from your computer).

Please note: Your ESS password is not the same as your Pheme password.

On-Screen ESS Help Links

Each ESS screen now has some additional links to further help.

Contacts

If you still have difficulties using or getting in to the ESS after reading the Help information and following the directions in the user guide, please contact your Personnel Faculty Team.
Please refer technical difficulties to the HR Systems Helpdesk on 6488 7896 or email ithelp-hr@uwa.edu.au.
1.0 Log On to Employee Self Service

Step 1: Enter at [http://www.hr.uwa.edu.au/working/applications/ess](http://www.hr.uwa.edu.au/working/applications/ess)

Step 2: Click on Login to ESS

Step 3: Enter your 8 digit Staff/Employee ID in the “Staff Number” ID box and your password in the Password box.

Your password is based (initially) on your date of birth using the format ddmmyy (e.g. if you were born on 9 July 1965 your password will be 090765). Note it is a 6 digit number, padded with zeros where applicable. When you have successfully accessed the ESS for the first time, you will be forced to change your password.

Step 4: Click OK.

Please note: Your ESS password is not the same as your Pheme password.

2.0 Log Out

At any stage you may log out of the Employee Self Service by clicking on Logout in the top right corner.

3.0 Password

Setting new password

Step 1: Go to the Change ESS Password the Employee Self Service. In the top right hand corner click on Links, then Change Password

Step 2: Enter your old password, new password and confirm the new password

Step 3: In the drop down menu select “User defined secret question.” Enter a secret question that will be asked should you forget your password, and enter the answer to the secret question. A correctly answered secret question allows your password to be emailed to you. (See Forgotten Password section below) For this function to work you must have your email address stored in the ESS. Except for Scholarship holders, email address is maintained through the Pheme system at [http://www.pheme.uwa.edu.au](http://www.pheme.uwa.edu.au). Scholarship holders who require their ESS password changed, will need to contact the HR Helpdesk on 6488 7896.
Answer the 'secret question'. If the answer provided is correct then a message displays showing the email address that your password has been sent to.

The ESS will prompt you to change your password the next time you log in.

**Changing password**

Click 'Links' on the top right corner, select change password and complete the form.
4.0 Navigation within Web Self Service

Home Page

The 'My Panel' on the left of the page has two sections:

• My Details - displays the employee number, active Job number and Position description of the logged in user. For Team Leaders, this area will also display the details of the employee 'in view'. This section also displays the active jobs for the logged in user. For Team Leaders, the view can be expanded to display team members.

• My Favourites - allows users to create a list of their frequently used or favourite application links.

Each of these panel items may be hidden individually by clicking on the minimise/maximise icon which is beside the panel item heading. Similarly, the entire My Panel may be minimised or maximised by clicking on the tab at the bottom right of the panel. The panel may also be re-sized by hovering over the right frame border until the cursor changes to arrows and then clicking and dragging the border.

Staff with more than one current job

1. Expand 'My Details' section.
2. You will be able to see all your current jobs.
3. Click on the job and click 'select' to see details for that job.
4. The 'plus' sign next to the staff number enables you to view your team list.

Please note: some screens show details for all current jobs, job numbers will be clearly stated next to each information.
Team Leader ‘View’

From within the My Details section of the user Panel, by highlighting a team member and clicking on ‘Select’, the Team Leader can select a team member and ‘Set the View’ to that team member at any level of the structure to access information about the team member using the Web Self Service menus and programs. Selecting another team member from the list and pressing ‘Select’ will change the employee in view.

When a user is viewing records of a team member in any screen, they can return directly to their own records by clearing the Team Members view either by selecting their own name/number and pressing ‘Select’ or selecting ‘Clear Team Member’ at the top of the page.

The employee number and name of the person in view will be displayed in the My Details section of the user Panel when a team leader is viewing records of a team member.

Please note: There are a few screens that the Team Leader does not have access to (i.e. Leave Booking Requests, Banking, Payslips and a few other).

To add a new program to the favourites menu:
1. Navigate to the page that you wish to add to your favourites menu. For example, open the Current Payslip to add it to the Favourites menu.

2. With the Current Payslip page open, click on the Add button under the My Favourites panel.

3. Current Payslip will be added to the Favourites list.

To delete an item from favourites, select the program by clicking it and then click on the Delete button.
5.0 MY DETAILS

5.1 Personal Details

5.1(a) Personal Contact

Select My Details > Personal Details > Personal Contacts.

To update your details, place the cursor over Contact Details and click. Make the changes required and press ‘update’ at the bottom of the page. You will receive a message that the changes have been successfully updated.

5.1(b) Emergency Contacts

Select My Details > Personal Details > Emergency Contacts.

Change: Place the cursor over the contact name and click. Make the changes required and press ‘Update’ at the bottom of the page. You will receive a message that the changes have been successfully updated.

Delete: Place the cursor over the contact name and click. Press ‘Delete’ at the bottom of the page. You will receive a message that the changes have been successfully updated.

Add: Place the cursor over Add new Emergency Contact record and click. Complete the details as required. Press insert at the bottom of the page. You will receive a message that the record was been successfully updated.

5.1(c) EEO Information

Select My Details > Personal Details > EEO Information.

The University is required to forward demographic data to DEST on an annual basis. Simply make the relevant selection for your Primary Language Spoken at Home and your Country of Birth, and click on the update button.
5.1(d) Preferred Name Maintenance

Select My Details > Personal Details > Pref. Name Maint.

The Preferred Name Maintenance screen in ESS allows you to do the following:

* enter an alternative first (given) name (e.g. Dave instead of David)
* if you have an additional legal surname in the HR system, select your current legal surname or your previous legal surname.

Your Preferred First Name and Preferred Surname will be used to construct your official UWA email address and be displayed in the Email and Calendaring Service (ECS) address lists. Changes made in the ESS may take up to two hours to process through Pheme and into related systems such as the ECS.

If you do make a change and you wish this to be reflected in your email address, you should log in to Pheme where you can select your alternative email address.

Changing your names(s) only affects Pheme and associated systems; it does not change your official name as held by HR.

Your preferred surname can only be maintained by you through this screen and not by Human Resources staff. When contacting Human Resources please continue to use your 'official' surname. Please note that only legal surnames can be recorded on the system.
5.2 Leave

5.2(a) Leave Booking Request

Step 1: Select My Details > Leave > Leave Booking Request

Step 2: Select Whole Day Leave Booking or Part Day Leave Booking as required. The appropriate booking form will then be displayed.

Note: There are differences between the forms, e.g. there is no End Date on the Part Day form, and there is not an Hours field on the Whole Day form.

Step 3: Enter the details as required:

Leave Code: Pull down the drop down list and select the appropriate code.
Start Date: Enter the date the leave is to commence.
End Date: Enter the date the leave is to finish.
Unit: Enter the unit of the leave. E.g. Hours.
Advance Pay: Enter a Yes or No as to whether you require pay in advance.

Please Note: Only a whole pay fortnight (14 days) can be paid in advance. Ensure that the leave end date is the last **SUNDAY** of a pay fortnight (not a Friday). It must be approved a month prior to the leave commencing. It will be your responsibility to submit applications that meet this 14 day minimum. It will also be your supervisor’s responsibility to approve the application in time for the payroll processing.

Medical Cert: Enter ‘Y’ if you have a medical certificate for Sick Leave or ‘N’ if you do not. This is a mandatory field for Sick Leave. **The medical certificate must be forwarded to the Supervisor for auditing purposes.**

Other Doc: This field is not relevant
**Reason:** This field will generate options based on the leave type selected above

**Comment:** Comments can be added if required.

**The leave types able to be selected within ESS are -**
- Annual Recreational
- Bereavement / Compassionate
- Ceremonial/Cultural
- Conference (Academic Staff Only)
- Emergency Services
- English Training
- International Sporting Events
- Personal (Sick/Carer’s) - medical certificates to be sent to HR Services
- Purchased (Employee Funded)
- Short Leave (General Staff Only) - covers Indigenous/Urgent Private Business
- TOIL (Time off in Lieu)

**Step 4:** Click **Submit Request** to submit your leave booking. You will receive a confirmation message that the leave booking was successfully updated.

**Note:** If leave booking exceeds the available leave balance the leave booking will be accepted but a Warning message **“The amount of leave requested exceeds available balance”** will be displayed. At this time the employee can reverse the entry or let it escalate to their Supervisor to Approve or Reject.

Leave Warning Messages

**Warning - Amount requested exceeds rostered hours.**

**Please note:** Once you have entered your leave application you may come across the ‘Warning Message’ below. The reason this message appears is because ESS determines your leave entitlement to that leave type as at the current pay period. You may not have a sufficient amount of leave as at this current pay period but if you do a leave projection to the end of the year, you will have the sufficient amount.

Check your available leave entitlement at the end of the year – through the “Leave Balances” menu item. If, after projecting to the end of the year, you do not have enough entitlement to cover the application you should not proceed with the application. If you do have enough entitlement by the end of the year, continue with your application, ignoring the warning message

**Warning!**
The Leave Request was successful, however, the following issue(s) were identified with the request:

**Warning - The amount of leave requested exceeds available balance.**
5.2(b) Leave Balances

Select My Details > Leave > Leave Balances

The balance is shown in hours. You can calculate your leave balances at a date by entering the desired date in the box (i.e. 31-Dec-2016) and pressing ‘Calculate Balances’. You can also select a date using the calendar function by pressing this button:

Please note that this screen displays only one job at a time.

Balance on another job: Select ‘Select Active Job’ from the menu options on the left. Click on the alternate job number required. Return to ‘Leave Balances Enquiry’ to view the balance.

Please note that leave balances are also displayed (as a collective entitlement) at the bottom of the payslip.

5.2(c) Leave History

Select My Details > Leave > Leave History

The leave bookings enquiry menu item allows you to view the approved leave bookings within a given period of time. On the selection screen, make some selections based on the period of time and the leave types you wish to search for, and click on the ‘Find’ button –

5.2(d) Roster

Select My Details > Leave > Roster

This menu item is specifically designed for part-time employees. It is used to allow part-time employees to check their roster pattern is accurate for the duration of their intended period of leave. This is important as it’s the roster pattern that controls the value of the leave entitlement to deduct. The system will automatically use the current date as your Enquiry Date. However you can change that date to check future, or retrospective, rosters you can change the Enquiry Date and click on Find.
This viewable roster result will allow you to check your work pattern for accuracy prior to booking your leave.

This menu item is specifically designed for part-time employees. It is used to allow part-time employees to check their roster pattern is accurate for the duration of their intended period of leave. This is important as it’s the roster pattern that controls the value of the leave entitlement to deduct. Simply nominate a date and a number of days and click ‘Find’, and the roster pattern held within the HR System will be displayed.

Reversing or Cancelling Leave

- If Leave has been approved

Go to Leave History and enter the required date or date range and click ‘Find’.

When the results are returned, and the leave application you wish to reverse is available, click on the reverse button on the Action column. It will ask you to confirm, once confirmed an email will be sent to your Supervisor. Once approved a return email will be sent to you as confirmation.

- If Leave has not been approved yet
Please note: rejected booking will show up on this screen and it should be deleted

Important Additional Information relating to leave application

- What do I do with my Medical Certificate?

The University of Western Australia sick leave policy remains unchanged by the implementation of on-line leave processing. This means that you will still be required to provide evidence of your illness, or of your family member’s illness for sick leave requests of three consecutive days or more.

In this case, please send your Medical Certificate to your Supervisor. You will need to include your name on the certificate, and the dates of the leave to which the certificate relates. Once the medical certificate has been sighted by your Supervisor, forward the medical certificate to Human Resources for storing.

- Will I still receive confirmation that my leave has been approved?

Yes. Your application for leave will trigger an automatic email to your current supervisor, which informs him or her that there is a transaction in the Employee Self Service needing approval.

As soon as your supervisor has approved or rejected your leave application, you will receive an email to let you know the status of your request.

If your current supervisor does not attend to your leave application within 10 working days, the ESS will automatically escalate your application to your supervisor’s manager for approval.

- Can my leave application be rejected?

Yes. Depending on operational requirements, supervisors may not be able to approve all leave requests. If this is the case, you will receive an email from your supervisor informing you that your leave has been rejected. Your supervisor is required to add any reasons or comments to the rejected application and the email will direct you to the Employee Self Service to view these comments.

You are encouraged to discuss any rejected leave applications with your supervisor or manager. If new leave dates can be negotiated, you will need to reverse the rejected application from the list displayed in your “Leave Requests” and submit a new Leave Request on the Employee Self Service facility. Rejected booking should be deleted from your pending transaction screen.
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- How do I change the dates of my leave application?

You need to reverse the booking and re-apply for your leave.

5.3 EMPLOYMENT

5.3(a) Appointment Details

Select My Details > Employment > Appointment Details.

Occupancy is the term used within Human Resources to describe your employee collective history. This Appointment Details screen simply represents for the selected Job, the employee history during that job/appointment.

The fields above each heading allow you to filter the appointment details as required. Once you have entered your required filters, press Enter on your keyboard and the details will update accordingly.

![Appointment Details Table]

OCC – relates to the occupancy type.

SUB - is substantive occupancy – generally considered your appointed position

CON - is concurrent occupancy – generally considered an appointment that occurs during your ownership of your original appointed position

HDA - is higher duties occupancy – used where you act in a role classified at a higher level than your original appointment

Active From and Active To just represent the effective dates to that “layer” of your occupancy.
5.3(b) Roster Enquiry

Select My Details > Employment > Roster

This menu item is specifically designed for part-time employees. It is used to allow part-time employees to check their roster pattern is accurate for the duration of their intended period of leave. This is important as it’s the roster pattern that controls the value of the leave entitlement to deduct. The system will automatically use the current date as your Enquiry Date. However you can change that date to check future, or retrospective, rosters you can change the Enquiry Date and click on ‘Find’.

This viewable roster result will allow you to check your work pattern for accuracy prior to booking your leave.

This menu item is specifically designed for part-time employees. It is used to allow part-time employees to check their roster pattern is accurate for the duration of their intended period of leave. This is important as it’s the roster pattern that controls the value of the leave entitlement to deduct. Simply nominate a date and a number of days and click ‘Find’, and the roster pattern held within the HR System will be displayed.

5.3(c) MBDP Maintenance

Select My Details > Employment > MBDP Maintenance.

The mailbag maintenance screen allows you to maintain a specific mailbag delivery point for you single or multiple jobs, here at UWA. Simply click on the drop-down field to select your mailbag value and then click on the update button. Into the future, the mailbag information will be passed through to the contact directory for automatic publishing.
5.4 Personal Development

5.4(a) Qualifications

Select My Details > Personal Development > Qualification

The University wishes to capture and keep an accurate academic profile of its staff. Upon navigating to the Qualifications screen, you will be presented with both a summary of those qualifications we currently hold for you, and an update screen that allows you to create and forward new qualifications for approval and storage.

To add a new record click on the ‘Add’ button. To update an existing record, select that record in the top list by clicking on the row for that item, this will update the details displayed in the Details section of the form to display the relevant details for that record. Edit the details as required.

Click the Save button to save the changes and then click the Submit button to submit the changed record for approval. If you don’t click on Submit then it will not be forwarded to your supervisor for approval.

A confirmation message will be displayed once the record is saved/submitted. If Save and/or Submit have not been selected, the Reset button will undo any currently entered changes and reset to the initially selected values for the record to the way it was before changes were entered. This button will have no effect if either Save or Submit have been selected previously.

To delete an existing record, highlight the applicable record to be deleted in the top block, and click the ‘Delete’ button as when editing a record. You will be prompted to confirm you wish to delete the record. The delete request record will appear in the Pending Qualifications table while awaiting approval.
- Export
Click on this button to display the current table data in XLS format for saving and/or opening in an Excel spreadsheet.
6.0 MY TEAM

6.1 Team Details

6.1(a) Leave Calendar

Select My Team > Team Details > Leave Calendar

This allows the manager to view a 3 month calendar displaying the approved leave currently recorded and booked for their staff. A date picker allows control over the date from which the 3 month period is projected and there is also the capability to restrict leave types. With the selections made, clicking on the ‘Display’ button will return the results.

![Leave Calendar Image]

6.1(b) Team Birthdays

Select My Team > Team Details > Team Birthdays

The Team Birthdays report allows you to view the birthdays for your staff.

![Team Birthdays Image]

6.1(c) Team Appointment Summary

Select My Team > Team Details > Team Appointment Summary

The appointment summary report displays all of those employees currently reporting to you. Additionally, this report includes appointment details about each employee, giving a more profiled view of their employment.
6.2 Management

6.2(a) Probations

Select My Team > Management > Probations

The probation report simply displays those employees who are still within their probationary period. The results of the report display the date that the probation is/was due to expire.

6.2(b) Increments

Select My Team > Management > Increments

The increment report displays those employees who are due an increment, displaying the date the increment is due, and the current step within their classification.

6.2(c) Sick/Carer Leave w/o Cert. (this year)

Select My Team > Management > Sick/Carer Leave w/o Cert. (this year).

This screen will show you which of your staff have taken Sick/Carer Leave in the current year without a Medical Certificate.
6.3 Leave

6.3(a) Team Leave Balances

Select My Team > Leave > Team Leave Balances

The leave balances report allows you to view the balances for leave as at the current pay period.

<table>
<thead>
<tr>
<th>Employee No</th>
<th>Job No</th>
<th>Name</th>
<th>Leave Code</th>
<th>Leave Code Description</th>
<th>Balance Actual Full</th>
<th>Leave Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>00000004</td>
<td>02</td>
<td>Fence, Noah</td>
<td>ALL</td>
<td>Annual Leave Load 33.544</td>
<td>33.544</td>
<td>H</td>
</tr>
<tr>
<td>00000004</td>
<td>02</td>
<td>Fence, Noah</td>
<td>LSL</td>
<td>Long Service Leave 225</td>
<td>422.012</td>
<td>H</td>
</tr>
<tr>
<td>00000004</td>
<td>02</td>
<td>Fence, Noah</td>
<td>PUNCH</td>
<td>Purchased Leave 6.0</td>
<td>6</td>
<td>H</td>
</tr>
</tbody>
</table>

6.3(b) Team Leave Bookings

Select My Team > Leave > Team Leave Bookings

The leave bookings screen allows you to view the approved leave bookings for your team.

7.0 MY APPROVALS

7.1 Approve Requests

Select My Approvals > Approve Requests

The approve transactions menu item is designed for Supervisors whose employees are submitting leave bookings through ESS. Clicking on the menu item will provide a summary table of the items awaiting approval. You can approve leave on the radio buttons, however, if the button is "greyed" out i.e. you will not be able to approve in this area.

If the buttons are 'greyed out' you must go into the Record Details and approve in this area.

There are primarily two reasons for this approval requirement –

1) Because there is some form of ‘Warning Message’ attached to the application and HR requires you to be aware of that warning message prior to approving the application

2) For sick leave, there is a medical certificate attached, and again, HR requires the approver to sight that a medical certificate was identified as being attached to the application.
To approve or reject the application, you click on the “Approval Status” drop down list, the status of the leave application appears as “Submitted.” In order to approve or reject the leave application, click on the drop-down arrow next to the Approval Status and change to “Rejected/Approved/Deferred/Escalated”.

Please note if you select “Deferred” on the application then you will need to enter the date you would like it to be resubmitted, if you select “Escalated” on the application then it will automatically go to your Supervisor/Manager.

Comments can be entered in support of the leave approval, rejection or escalation as required.

Once all details are entered, click on “Update” to save the entry, or on “Cancel” to escape the leave request. The “Update” function will automatically update the Alesco Payroll System with no need for the employee to complete a leave from, or for a supervisor to sign it.

Please Note: Before approving sick leave you will be required to sight the employee’s medical certificate in line with the University’s Policy. Once the medical certificate has been sighted, forward it to Human Resources to be placed on the individual’s staff file. Schools can take a copy for their own records.

7.2 Approval History

Select My Approvals > Approval History

The approval history menu item is designed for Supervisors to see employees leave history. Select the employee you wish to view and click on the find button.

This screen shows bookings that have been reversed and future bookings.

- What Happens if I Don’t Action the Leave Request?

The Employee Self Service has been set to escalate all leave applications after ten working days. This means that once you have received an email stating that an employee has applied for leave, you will have ten working days to log onto the Employee Self Service and approve or reject the application.

If you are unavailable for greater than ten days, your own Supervisor or Manager will receive an email stating that a leave application has been escalated from you. In this case, your Manager will need to approve or reject the leave. Leave that has not been approved after it has escalated once will then escalate to Human Resources for a follow up after the 20 days.

Your employee will receive a system-generated email once you have approved a leave application.
- What are the Important Points to Note in this Approval Process?

- Sight the Medical Certificate inline with the University’s Policy and send to Human Resources for storage. (School may wish to take a copy for their own records)

- Check if the Employee has requested Pay in Advance. (If so check the pay in advance booking is inline with the ESS Leave User Guide for pay in advance)

If an employee has sought to delete an approved leave request, that application for reversal/deletion will also come through for approval – as displayed below.

- How to approve if button greyed out

The following process should be followed for either Warning Message and Medical Certificate related requirements:

Select the **Record Detail** link.

This link opens an additional web browser window, allowing you to view/read the warning message and make a decision on approval. If you wish to continue with approval, select **Approve** from the **Approval Status** drop down list and select the **Update** button.
View and Update Request

**Warning!** The Leave Request was successful, however the following issue(s) were identified with the request:

> **Warning - The amount of leave requested exceeds available balance.**

<table>
<thead>
<tr>
<th>Person Id</th>
<th>00018387</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Blyoe, Mary-Jay Suzanne</td>
</tr>
<tr>
<td>Job Id</td>
<td>01</td>
</tr>
<tr>
<td>Position</td>
<td>105255 Human Resources Advisor</td>
</tr>
<tr>
<td>Leave Code</td>
<td>REC - Annual Recreation Leave</td>
</tr>
<tr>
<td>Start Date</td>
<td>25-Mar-2007</td>
</tr>
<tr>
<td>End Date</td>
<td>10-Aug-2007</td>
</tr>
<tr>
<td>Unit</td>
<td>727.5 Hours</td>
</tr>
<tr>
<td>Advance Pay</td>
<td>N</td>
</tr>
<tr>
<td>Medical Cert.</td>
<td>N</td>
</tr>
<tr>
<td>Other Doc.</td>
<td>N</td>
</tr>
</tbody>
</table>

8.0 My Pay – Payroll Details

8.1 Current Payslip

Select **My Pay > Payroll Details > Current Payslip.** This will display your most recent payslip.
8.2 Payslip History

Select My Pay > Payroll Details > Payslip History. This will display previous payslips.

Move your cursor over the date of the payslip required (cursor will turn into a hand) and click. The screen will display the payslip.

Any enquiries related to the details within the payslip can be discussed with your Faculty Employment & Recruitment personnel.
8.3 Bank Accounts

Select My Pay > Payroll Details > Bank Accounts

At the bottom of the Details block are four icons (Add, Delete, Reset and Save) which are used when adding a new bank account, and/or deleting or amending an existing account.

The records can easily be exported to Excel using the Export Icon (next to Table Options) and there is a search facility using the search icon.

Prior to saving, any data entered or changed in the Details block can be cancelled by pressing ‘Reset’.

To add a new bank account, select the ‘Add’ icon at the bottom of the form.

**Payment Method:** Bank.

**BSB#:** Enter or select a BSB number.

**Bank**

The Bank name should populate once the BSB number has been entered and the user tabs to navigate to the next field (if this does not populate a bank name can be selected from the list of values).

**Account #:** Enter the account number.

**Account Name:** Enter the name that the account is held in (normally the user’s name).

**Percentage:** Enter the percentage of net pay that is to be disbursed to this account, if applicable (if a Percentage is entered, the Fixed Amount field must be left blank).

**Fixed Amount:** Enter the fixed amount of net pay that is to be disbursed to this account, if applicable (if a fixed amount is entered, the Percentage field must be left blank).

**Reference:** Enter any relevant reference numbers

**Save** The record must then be Saved.

If there are no errors, a message will pop up advising that the record has been saved successfully.

To change an existing bank account, in the Summary block select the account to be changed, make relevant changes and select Save.

To delete an existing bank account, in the Summary block select the account to be deleted, and press Delete.

- If bank account is closed and user would like to replace that with a new bank account:
  1. Add the new bank account and insert a fixed amount.
2. Save

3. Select the account that is to be replaced

4. Insert a fixed amount for the account that is to be deleted

5. Select the new account and delete the fixed amount to make it the primary account. Save.
6. Select the deleting account. Delete. A message will pop up to confirm record has been deleted successfully.

8.4 Deductions

Select My Pay > Payroll Details > Deductions.

This screen displays the current deductions being deducted from your fortnightly pay.

- The “Job No.” column identifies the Job number that the deduction is set up against.
- The ‘Start Date” columns identifies the start date for this particular deduction – typically the beginning of a pay period.
- The “Type” column specifies whether that deduction is deducted as a percentage (P) or as an amount (A).
- The “Balance” column is used where you may have a deduction setup to deduct each fortnight to the total of a particular value, i.e. deduct $10 per pay until you reach $100, and then cease the deduction. In this scenario, that balance will adjust itself each fortnight until the limit value is reached. This scenario is not relevant for staff at UWA at this stage as the deductions allowed to be maintained are not suited to this scenario.
8.5 Payment Summary

Select My Pay > Payroll Details > Payment Summary

ESS provides your payment summary electronically. HR Services also provide you with the ability to choose to only receive your payment summary electronically – which is seen by HR Services and the University as a great alternative to the historical manual and hardcopy process of distribution.

You will initially see a summary view of your current and historical payment summaries.

Click on the “Serial #” (which is a link) to view the actual details of the payment summary.