

Staff Portal Reference

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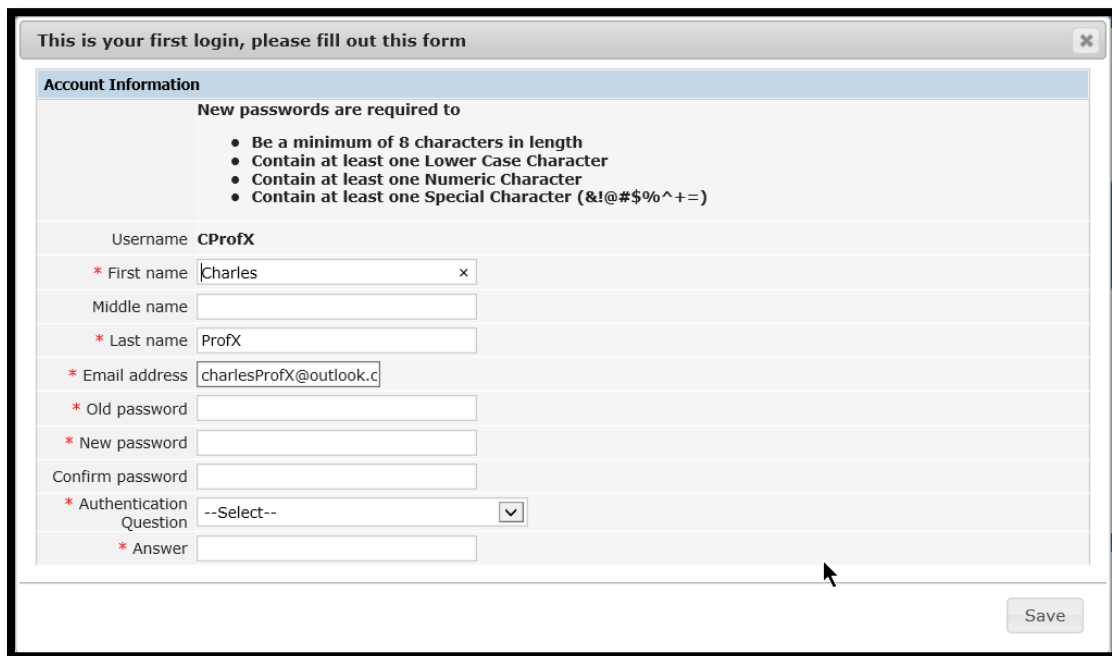
FIRST LOGIN

When the system administrator first sets up your account, you will receive a welcome email with your username, temporary password, and a link to the staff portal. After you receive the welcome email, you will need to perform the following steps to activate your login:

1. Click the link to the application that was provided in the email.
2. Enter your **username** and/or temporary **password** that was provided in the email.

A screenshot of a login page. It features a large blue 'C' shaped graphic on the left. To the right of the graphic, the word 'Login' is displayed with a key icon. Below 'Login', there are two input fields: 'Username' with the text 'EJeck' and 'Password' with masked characters '*****'. A 'Log in!' button is positioned below the password field. At the bottom, there is a link that says 'Forgot your Password?'.

3. Click the **Log In** button and the first login prompt will display, which will require you to enter a new password and set up a security question and answer.

A screenshot of a web browser window titled 'This is your first login, please fill out this form'. The form is titled 'Account Information' and includes a section for password requirements: 'New passwords are required to' followed by a bulleted list: 'Be a minimum of 8 characters in length', 'Contain at least one Lower Case Character', 'Contain at least one Numeric Character', and 'Contain at least one Special Character (&!@#\$\$%^+=)'. Below this, the form has several fields: 'Username' (pre-filled with 'CProfX'), 'First name' (pre-filled with 'Charles'), 'Middle name' (empty), 'Last name' (pre-filled with 'ProfX'), 'Email address' (pre-filled with 'charlesProfX@outlook.c'), 'Old password', 'New password', 'Confirm password', 'Authentication Question' (a dropdown menu with '--Select--' selected), and 'Answer'. A 'Save' button is located at the bottom right of the form.

4. Enter the temporary password you received in your email in the **Old Password** field.
5. Enter a meaningful password in the **New Password** field. Please note that your new password must contain:
 - eight or more characters,
 - at least one numeric character,

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- one upper and lower case character,
- and one special character (&!@#\$\$%^+=).

NOTE: Passwords will expire every 30 days and **MUST** be unique when compared to your last 10 passwords.

6. Enter your new password in the **Confirm Password** field.
7. Select a question from the **Authentication Question** field.
8. Enter your answer to the authentication question in the **Answer** field.

This is your first login, please fill out this form

Account Information

New passwords are required to

- Be a minimum of 8 characters in length
- Contain at least one Lower Case Character
- Contain at least one Numeric Character
- Contain at least one Special Character (&!@#\$\$%^+=)

Username **CProfX**

* First name Charles

Middle name

* Last name ProfX

* Email address charlesProfX@outlook.c

* Old password

* New password

Confirm password

* Authentication Question What is the name of your favorite pet? ▾

* Answer Brutus

Save

9. Click the Save button, which will take you to the **Home** page of the CSIU Staff Portal.

Financial Information System

Logged in as: aambridge

My Page Staff Portal

Home

Announcements

Announcement	Attachment
testing item 14 in 3947	
The attached Financial Information System (FIS) Supervisor Staff Portal Reference provides instructions o...	
W2 Form Instructions	
Welcome to CSIU's new financial Information system (FIS) ! You have received a new username and pass...	

Page 1 of 1 Rows Per Page: 10 Displaying 1 - 4 of 4

External Websites

Title	Description
Capital Blue Cross	Health insurance carrier
Geisinger Healt...	Health insurance carrier
Medco Prescrip...	Mail order prescriptions
The Employee A...	Provides CSIU staff and members of their immediate family with personal and professional assistanc...
PSERS (Public S...	Employee retirement
Philadelphia Fed...	Voluntary credit union
W-4 Form	To make changes to your exemptions complete this form and return it to the payroll office.

Page 1 of 1 Rows Per Page: 10 Displaying 1 - 7 of 7

My Favorites

Application	Description
HR/Payroll	My Information
HR/Payroll	My Information

Page 1 of 1 Rows Per Page: 10 Displaying 1 - 2 of 2

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HOME PAGE

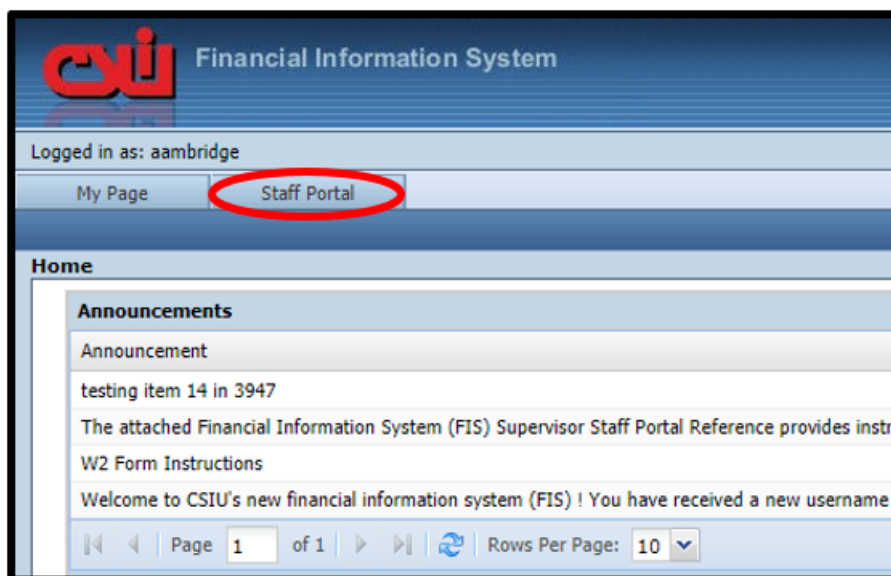
The Home page of the CSIU Staff Portal gives you access to the:

- Staff Portal – where you can request absences, access personnel and payroll information, W2 forms, salary and benefit information, and credit reimbursements.
- My Page – where you can change your password, change your security question and answer, and edit additional preferences.

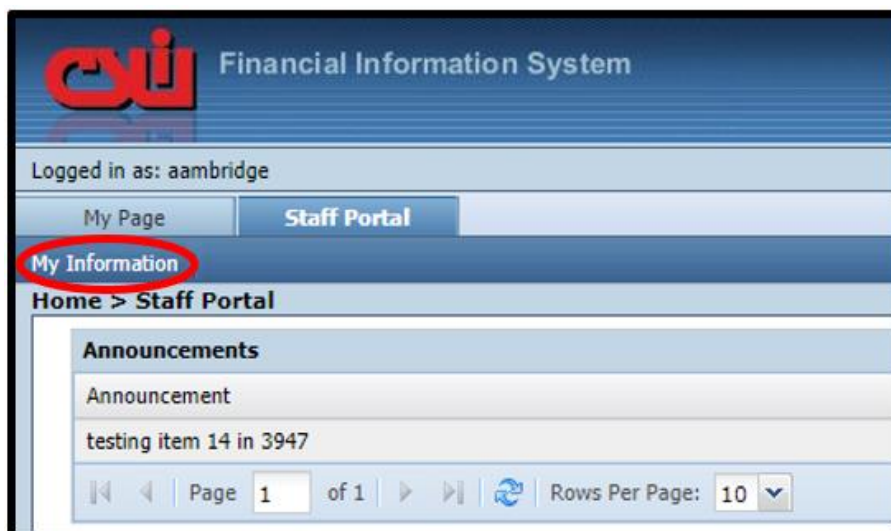
STAFF PORTAL

To navigate to the Staff Portal, do the following:

1. Click the **Staff Portal** link, which is located in the upper left of the page next to **My Page**.



2. Click the **My Information** tab, to access your information.



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After you click the **My Information** tab, you will see additional menu options and by default you're my information screen that contains your Demographic, Contact Information, Direct Deposit, Deductions, Taxes, Insurance, Clearances, and Outstanding requests display based on the options that have been enabled for you to view. You can click on any of the tabs to view your related information.

The screenshot displays the 'Financial Information System' staff portal. The user is logged in as 'aambridge'. The 'My Information' tab is selected, showing a sidebar with links to 'My Information', 'Pay Calculator', 'Pay History', 'My Absences', 'Salary Wage Information', 'Timesheet Information', and 'Course Activity Information'. The main content area has tabs for 'Demographics', 'Contact Information', 'Direct Deposit', 'Deductions', 'Taxes', 'Insurances', 'Clearances', and 'Outstanding Requests'. The 'Demographics' tab is active, displaying personal information for Ann R. Ambridge, including name, address, birth date, gender, and ethnicity, with 'Edit' buttons for each field.

Demographics	
Name: Ann R Ambridge	Staff Status: Active ID: 6
Last: Ambridge	First: Ann Edit
Middle: R	Prefix: Edit
	Suffix: Edit
Address 1: 467 WYMOING AVE	Address 2: Edit
City: SUNBURY	State: Pennsylvania
ZIP: 17801	ZIP+4: Edit
Birth Date: 8/1/1945 Edit	Gender: Female Edit
Marital Status: Married Edit	Maiden Name: Moore Edit
Email Address: msmith@mail.csliu.org Edit	
Ethnicity: Non-Hispanic	Race: White Edit

The **My Information** tab gives you access to the following information based on the options that your system admin has set up for you:

My Information

Allows you to view and possibly request changes to your basic HR/Payroll information. Please note that add and edit buttons may be available for you to add information or request changes. For example, you may want to update your phone number or edit your emergency contacts. All Adds and Edits go through Human Resources for approval before they take effect and can be viewed on staff portal pages.

Pay Calculator

Allows you to update your Federal withholding information or deductions to allow you to calculate a pay to see the Net Pay results. Please note that this will NOT calculate an actual Pay Check. If you have been given access to request changes to that information you can submit those change requests here as well.

Pay History

Allows you to access, print, or view historical Payroll information and W2 information (when available).

My Absences

Allows you to access your current absence balance, view absence details, and request time off.

Salary Wage Information

Allows you to view your wage information from a schedule. You can also view your Salary/Wage and Benefit letter if your employer provides you with such letters.

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Timesheet Information

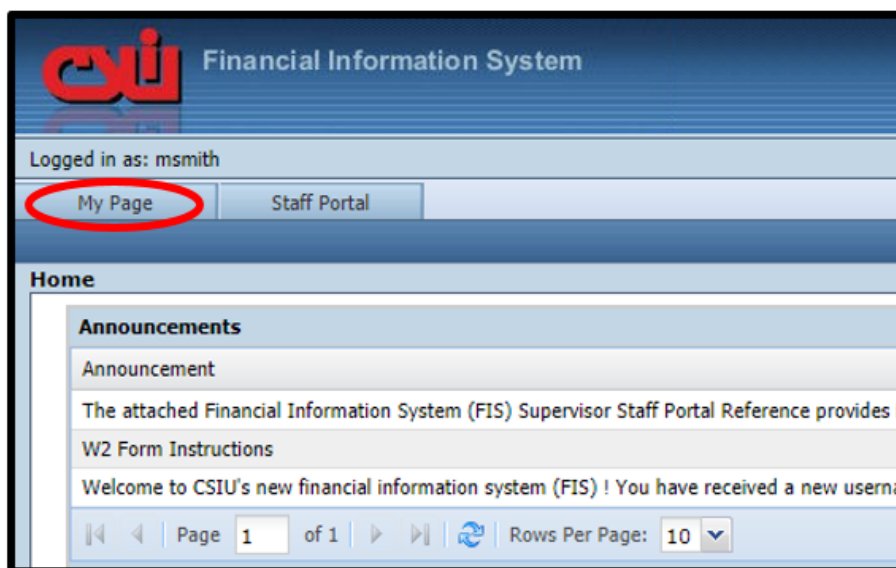
Allows you to enter your hours or days worked for a specific pay period if you need to submit a timesheet for payment.

Course Activity Information

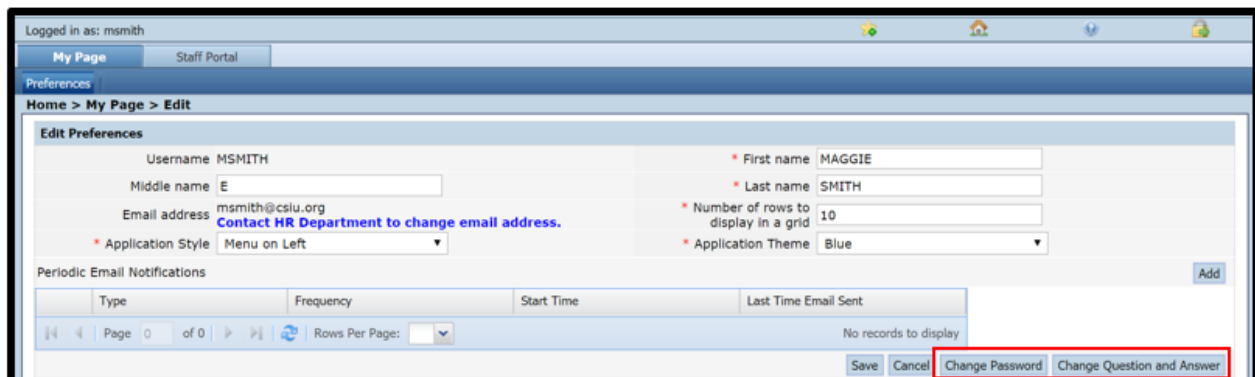
Allows you to view course/activity history information and register for an upcoming trainings. You can also request a reimbursement for a course that was approved for reimbursement.

MY PAGE

To navigate to My Page, click the **My Page** tab.



After you click the **My Page** tab, you will see your user information. The main purpose of the My Page area is to change your Password and/or security Question and Answer. If your employer is using SSO (Single Sign On) which uses your email and you password will always stay in sync with your email password you will not use this screen to update your password and security question information.

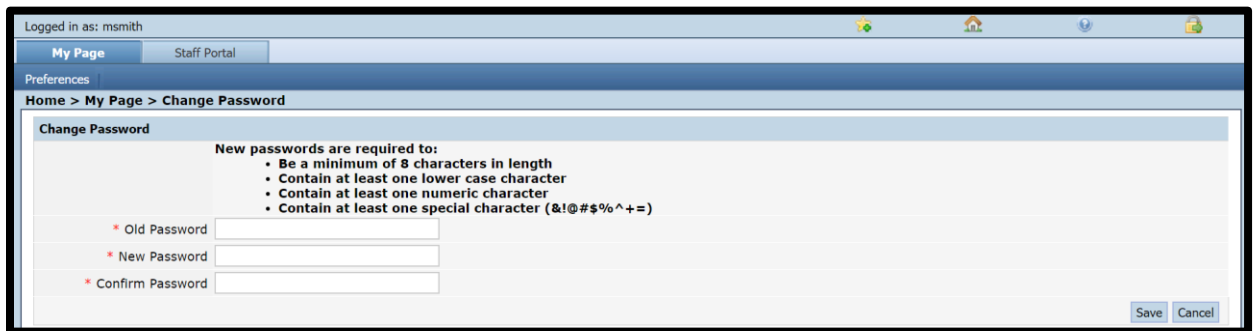


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Change Password

To change your password, do the following:

1. Click the **Change Password** button, which opens the *Change Password* page.

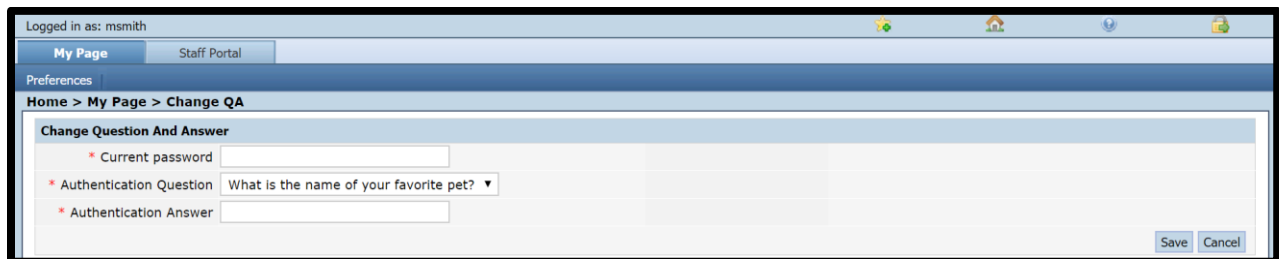
The screenshot shows a web browser window with the URL 'Logged in as: msmith'. The page has a navigation bar with 'My Page' and 'Staff Portal' tabs. Below the navigation bar, there's a breadcrumb trail: 'Home > My Page > Change Password'. The main content area is titled 'Change Password'. It lists requirements for new passwords: 'New passwords are required to: • Be a minimum of 8 characters in length • Contain at least one lower case character • Contain at least one numeric character • Contain at least one special character (&!@#%\$%^+=)'. There are three input fields: 'Old Password', 'New Password', and 'Confirm Password', each preceded by a red asterisk. At the bottom right, there are 'Save' and 'Cancel' buttons.

2. Enter your current password in the **Old Password** field.
3. Enter a new password in the **New Password** field. Note that your password must contain eight characters as well as one lower case, numeric and special characters.
4. Enter the new password again in the **Confirm Password** field.
5. Click the **Save** button and you will be returned to the main *My Page* area.

Change Security Question and Answer

To change your security question and answer, do the following:

1. Click the **Change Question and Answer** button, which opens the *Change QA* page.

The screenshot shows a web browser window with the URL 'Logged in as: msmith'. The page has a navigation bar with 'My Page' and 'Staff Portal' tabs. Below the navigation bar, there's a breadcrumb trail: 'Home > My Page > Change QA'. The main content area is titled 'Change Question And Answer'. It has three input fields: 'Current password', 'Authentication Question', and 'Authentication Answer', each preceded by a red asterisk. The 'Authentication Question' field has a dropdown menu with the text 'What is the name of your favorite pet?'. At the bottom right, there are 'Save' and 'Cancel' buttons.

2. Enter your current password in the **Current Password** field.
3. Select a question from the **Authentication Question** field.
4. Enter an answer in the **Authentication Answer** field.
5. Click the **Save** button and you will be returned to the main *My Page* area.

Additional My Page Features

My Page also allows you to:

- Update your First, Middle and Last names using the name fields. This does not change the information on your staff record.

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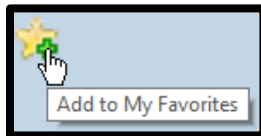
- View your email address. If you are able to change your email you will see a link to the Staff Portal page to submit a change request. Otherwise only HR/Payroll staff can change a work email address.
- Customize if the menus show to the left or right of the application using the Application Style field.
- Customize the color of your staff portal by using the Application Theme field.
- Customize the number of records that display in a grid.

ADDITIONAL NAVIGATION TOOLS

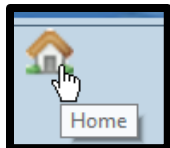
At the top of the Staff Portal, you may have noticed various icons. You can move your cursor over the icons for tool tips to help you identify what each icon does.



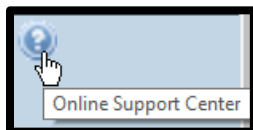
From left to right, the following icons allow you to perform various functions. Please note that some options may not be available to you.



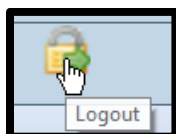
The star icon is used to Add links to your favorites. You can click this icon to add the webpage to your My Favorites section of the homepage. This allows you to quickly access the webpage instead of navigating through folders.



The house icon is used to navigate back to the main Staff Portal page. The main (or Home) page allows you to view announcements and your My Favorites links.



The question mark icon is used to navigate to the online support center, which is the central location for software documentation.



The lock icon is used to logout of the application.

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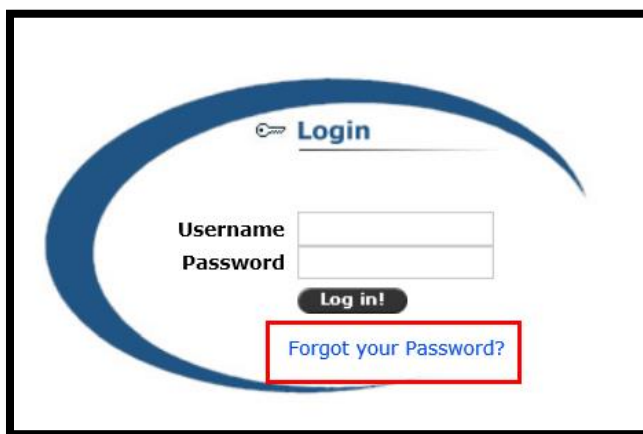
FORGOT PASSWORD

If your employer is not using SSO as mentioned above and you forget your password, you can retrieve and create a new password using the Forgot your Password link on the CSIU Financial Application Login page.

NOTE: Accounts are locked after three failed attempts to log in. It's advised that you use the Forgot Password option after the second attempt. If you are you locked out, you will need to contact the system admin to unlock your account.

To retrieve your password, perform the following steps:

1. On the CSIU Financial Application Login page, click the **Forgot your Password?** link.



2. Enter your username in the **Username** field.

3. Click the **Submit** button.
4. Enter your answer to the Authentication Question in the **Authentication Answer** field.
NOTE: if you do not know your answer, you will need to contact your System Administrator or your Human Resources department.

5. Click the submit button.