Introduction to üKG

UltiPro by ULTIMATE SOFTWARE   KRONOS

SUMMARY OF TOPICS

UKG System Walk-through

Time Management Training

USING ÜKG

THINGS YOU CAN DO IN THE SYSTEM

1) VIEW pay statements/W2/Tax Withholdings

2) ENROLL in your anual benefits

3) UPDATE your personal information

4) MANAGE emergency contacts & dependents

5) ENTER time off requests

6) VIEW reporting & company information

VISIT <u>Our IAPMO HR Website</u> for training guides.

| HOME | BENEFITS | BENEFIT HIGHLIGHT | PAYROLL/UKG | IAPMO CARES | SAFETY | LABOR LAWS | ABOUT HR | THE QUARTERLY DRIP | MANAGER PAGE |

üKG

What is UKG?

UKG is our complete HRIS System. It is where you request time off, clock in, view paychecks, and make benefit elections at open enrollment. If you haven't created an account, don't delay do it today!

Click the UKG Logo or the button below to go to the UKG site.

THIS WAY TO UKG ⟶

Quick Guides

All Employees

PDF
Employee Training Recap

PPT
UKG Employee Training

PDF
Updating Beneficiaries

PDF
Request/Modify Time Off

PDF
UKG Login Guide

PDF
Compatibility Guide

PDF
1095C Guide

PDF
PTO Balance

PDF
VOE/VOI Quickstart Guide

Time Management Training Guide

For All Employees

Requesting Time off

Supervisor/Managers and Time Approvers

PPT
UKG Supervisor Training

PDF
View your Teams Calendar

Time Management Training Guide

Supervisor / Managers

★ Login training video available on our <u>HR Website</u> under "training videos".

ACCOUNT SETUP
HOW TO LOG IN

- WEBSITE https://nw15.ultipro.com/
- USERNAME first.last@iapmo.org

UKG

Welcome, come on in!

Username
first.last@iapmo.org

Password
MMDDYYYY

Sign in

Forgot your password?

Powered by UKG

- NEW HIRE/RESET PASSWORDS Date of Birth (MMDDYYYY)
- EXISTING EMPLOYEES Last password set

ACCOUNT SETUP
PASSWORD REQUIREMENTS

- After logging in to the self-service for the first time with your DATE OF BIRTH (MMDDYYYY), you will be prompted to change your password.
- For security reasons, your password must contain at least one upper-case alphabetic character, one lower-case alphabetic character, one numeric character, and one special character.
- It can be any combination of alpha-numeric characters that meet ALL the requirements listed on the Change Password screen.
- It cannot include spaces or apostrophes.
- It is case sensitive.

Change password

Your new password cannot be the same as your previous one and must meet the minimum password requirements outlined below:

- Password length: **15-64**
- Letters: **2**
- Uppercase: **1**
- Lowercase: **1**
- Numbers: **1**
- Special characters: **1**
  Examples: !@#$%^&*()_-+={[}]|\:;\"'<,>.?/~`

Current password

New password

Confirm password
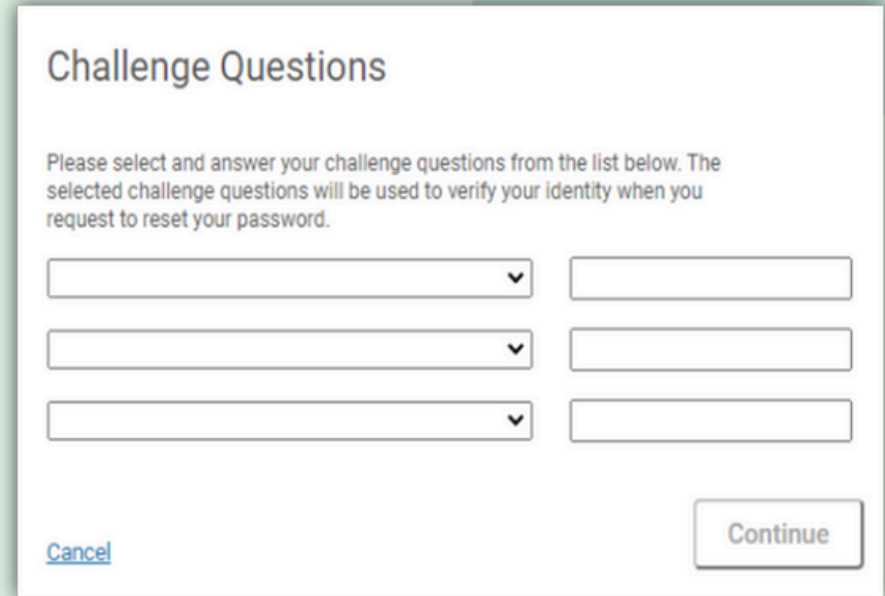
ACCOUNT SETUP

CHALLENGE QUESTIONS

After choosing your new password, you will then be asked to set up three challenge questions. These can be used to reset your password in the case you forget it, when you press the "Forgot your Password" link.

Tips to set up the challenge questions:
1. Select questions that you know the answer to and type in the answer to the right of the question.
2. The answers are case-sensitive.

Remember your password!

NOTE: It is always best to record your password in a safe place, HR will only be able to completely reset your password to the default settings.

Challenge Questions

Please select and answer your challenge questions from the list below. The selected challenge questions will be used to verify your identity when you request to reset your password.

Cancel   Continue

If you need assistance resetting your password, you can contact the front office at frontoffice@iapmo.org

NAVIGATING YOUR ACCOUNT

A SELF-GUIDED TOUR

- At initial log in, you will be asked to click the "I understand" button.
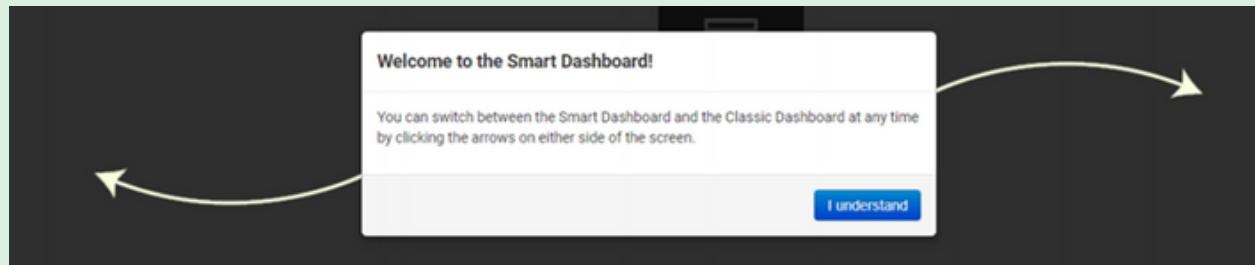
- You will then be prompted to go through the self-guided tour.

NAVIGATING YOUR ACCOUNT

THE SMART DASHBOARD & ADDING SHORTCUTS
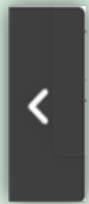
On the left and right of the screen, you will see these arrows, you can use these to toggle back and forth between The Smart Dashboard & The Classic View.

- You can personalize your Smart Dashboard by adding which shortcuts you would like to appear. The links that are available depend on your web access rights granted by your administrator.

- To add a shortcut, select the 🖊 icon on your Smart Dashboard, select the shortcut you would like to add, and it will then appear on your Dashboard.

My shortcuts 🖊

🕐 Time Clock Entry >

🕐 Time Management >
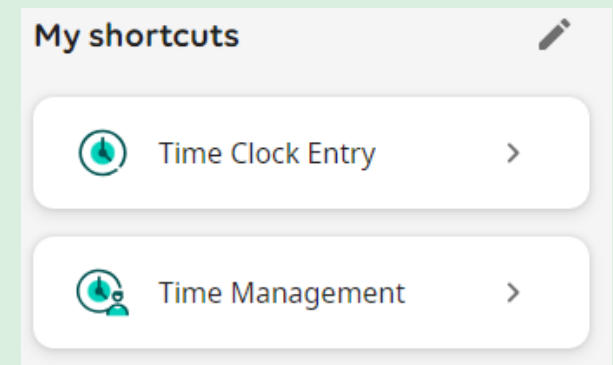
NAVIGATING YOUR ACCOUNT

THE SMART DASHBOARD – LAST PAY WIDGET & INBOX

On the homepage, you will also see a widget for your last pay statement.
This widget will take you to view your most recent pay stub.

For me

My pay

✓ Last pay Thursday, August 15

View detailed paystub

The inbox 🔔 will notify you of any action items that you might need to take, such as accepting a new handbook, policies, or reading internal announcements.

✕ **Notifications**

You're all caught up!
That deserves another cup of coffee.

NAVIGATING YOUR ACCOUNT

TIME MANAGEMENT

★ Time Management - You can review your timesheet for missed or incorrect punches, view your accruals balances and hours worked, and input your sick/vaction time requests here.

UKG

Requesting and Modifying Time Off Quick Guide

Submiting a time off request on UKG is easy and convenient. The system allows you to modify a time off request from multiple days to less than 8 hours. Keep in mind, time off requests must be made in increments of one hour.

STEP ONE: Log in and click the Myself Tab

IAPMO

1. Select MYSELF tab

My sel f

Personal
My Company
Jobs
Career & Education
Pay
Giving

2. Click on TIME MANAGEMENT

Time Management

Time Clock Entry
Benefits
Documents

Home
Inbox
Logout

STEP TWO: Once under the Time Management page look on the right side under THINGS I CAN DO right underneath your name

Your Name Here

Things I Can Do

Add Time Off Request

Click on ADD TIME OFF REQUEST

Quick Tours and Tips

Request Time Off

841e - Time Management for Employees Overview

STEP THREE: This is where you can customize your request. Fill out the form with complete day(s) requests. For advance requests look for the ADVANCED OPTIONS.

Requests

Time-Off Requests

Available Balance

VACATION
SICK LEAVE

Check AVAILABLE accrual balance here

After filling in the correct type of time off, beginning and end dates, optional description and notes, click SAVE

New Request

Advance Options

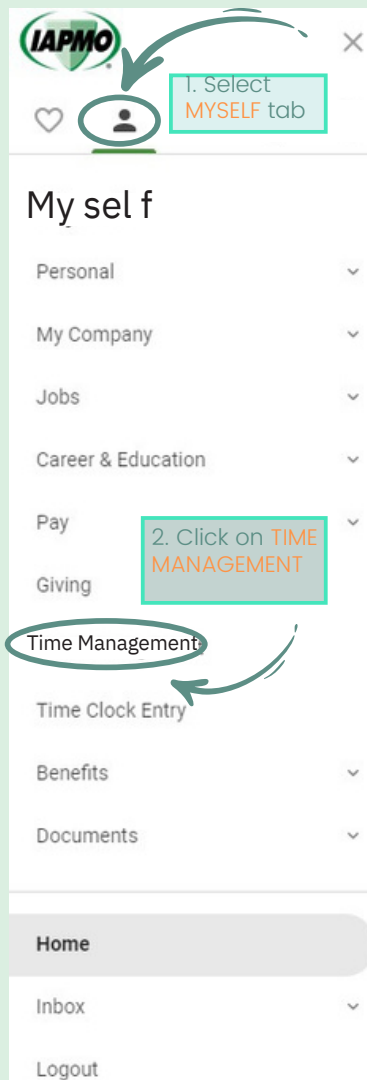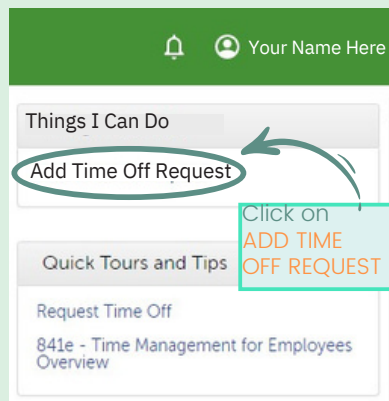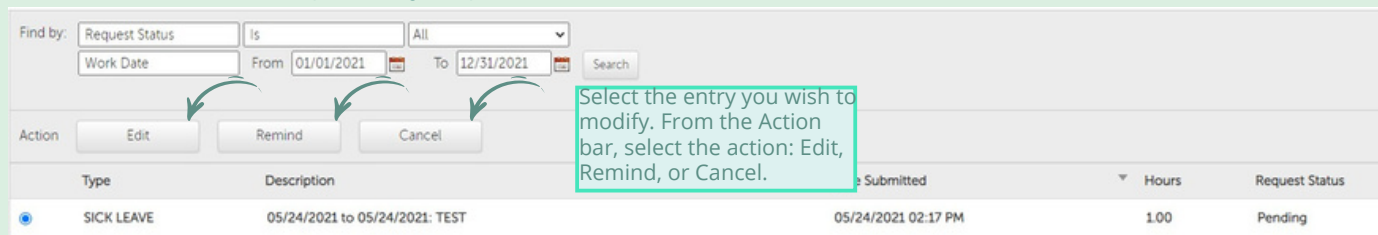| Description | Partial Day |
Type	VACATION
From	05/24/2021
To	05/24/2021
Total	3
Notes	

Date	Day	Type	Hours	Start	End	Available Hours	Remaining Hours
x	05/24/2021	MON	VACATION	3.00			30.01	27.01

Advance Options

For ADVANCED requests, such as
• partial days
• multiple pay codes
• non-consecutive days
look for the ADVANCED OPTIONS box to display the daily table. Here you can specify amount of time, in increments of one hour, start and end dates and different code types for each request.

TO MODIFY AN EXISTING REQUEST: You can modify and cancel requests for time off, as well as send a reminder to respond to a request in Time Management using the landing page. To do this repeat STEP 1, then click the ≡ button found at the top left corner. Select SCHEDULER then REQUEST. This will open a box listing all taken, declined, cancelled and pending requests.

| Find by: | Request Status | Is | All | Search |
| | Work Date | From 01/01/2021 | To 12/31/2021 | |

| Action | Edit | Remind | Cancel |

Select the entry you wish to modify. From the Action bar, select the action: Edit, Remind, or Cancel.

	Type	Description	Submitted	Hours	Request Status
●	SICK LEAVE	05/24/2021 to 05/24/2021: TEST	05/24/2021 02:17 PM	1.00	Pending

• If you select EDIT, an Edit Request form appears with the original information. • If you select REMIND, a Reminder Message pop-up window appears. Enter a message to your supervisor and select Remind (for example, "need to buy airline ticket soon"). • If you select CANCEL, a Cancel Message pop-up window appears. Note: Cancellations do not remove events, such as meetings, from your personal and/or shared Outlook calendars. To keep your calendar(s) current, please manually delete the applicable meeting(s).
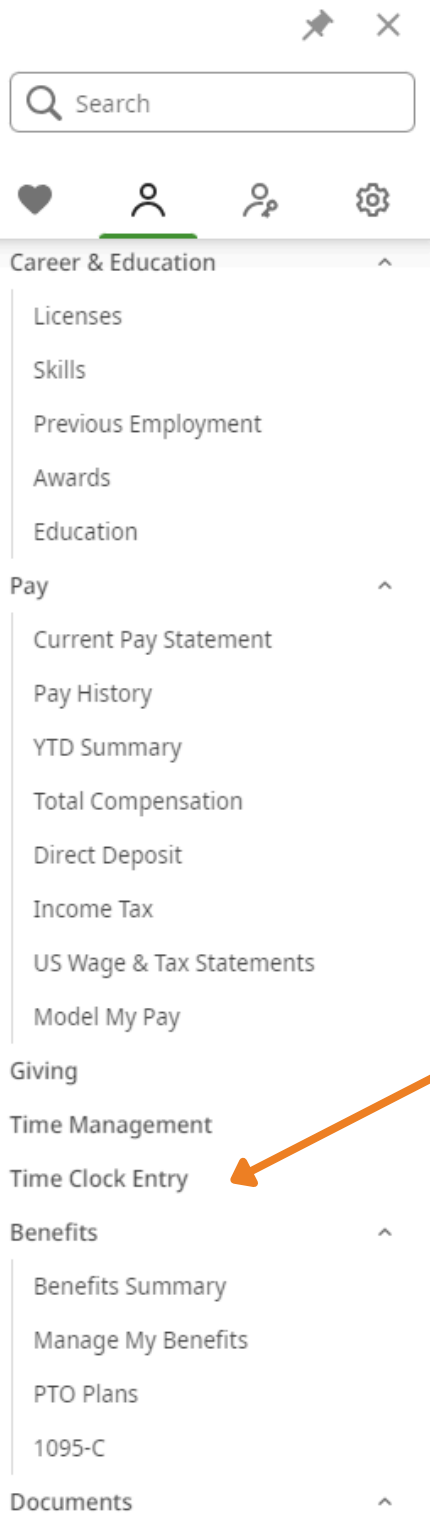
NAVIGATING YOUR ACCOUNT

TIME CLOCK ENTRY

★Time Clock Entry - Below you will see two ways that you can clock in.

1) Through your online account under **Myelf >> Time Clock Entry**, you can also add "**Time Clock Entry**" as a Shortcut to your Dashboard.

Thursday, 08/29/2024 4:06:15 PM

Welcome!

Punch   Transfer
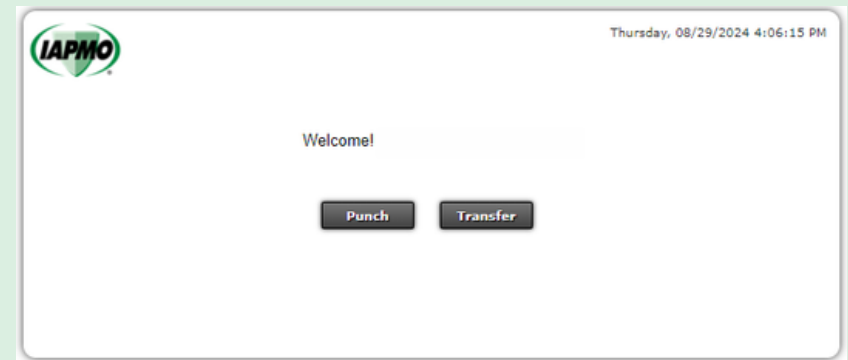
2) Through the iPad Kiosks located in each building. Your **Time Clock Pin** can be found under **Personal >> Employee Summary** or **Job >> Job Summary**.

1:55 PM   East Front BLD

	Go ›
1	2	3
4	5	6
7	8	9
✕	0	←

English
Language - Langue - Idioma - Sprache - Lingua

NAVIGATING YOUR ACCOUNT

FAVORITES MENU

You can access your Favorites menu by clicking on the ♡ icon. You'll find all the items that you've marked as your Favorites. This menu is customizable.

IAPMO

♡ 👤 👥 👤🔍
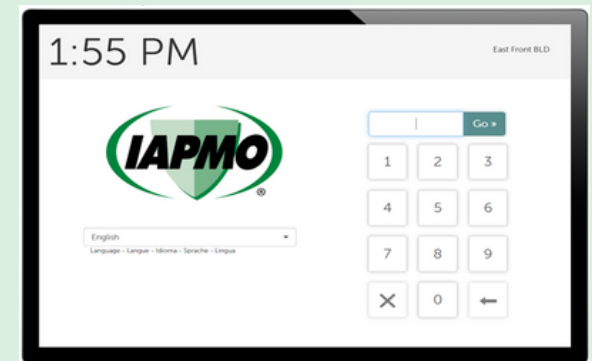
Favorites Menu

Access your favorite pages from one location. Select Add Favorites and get started!

Add Favorites

Home

Inbox ⌄

Logout

Edit Favorites

Select your favorites (0/40 selected)

Select up to 40 links you would like to see in your favorites menu.

MYSELF (0 selected)

Personal
- ☐ Employee Summary
- ☐ Name, Address, and Telephone
- ☐ Status/Key Dates
- ☐ Emergency Contacts
- ☐ Property
- ☐ Private Info
- ☐ Identification Documents

My Company
- ☐ Company Info
- ☐ Electronic Forms
- ☐ Employee Directory
- ☐ Organization Chart
- ☐ View Opportunities
- ☐ UKG.com

Jobs
- ☐ Job Summary
- ☐ Compensation
- ☐ Job History
- ☐ Reviews
- ☐ Other Company Info

☐ **My Onboarding**

Career & Education
- ☐ Licenses
- ☐ Previous Employment
- ☐ Awards
- ☐ Education

Pay
- ☐ Current Pay Statement
- ☐ Pay History
- ☐ YTD Summary
- ☐ Direct Deposit
- ☐ Income Tax
- ☐ W-2
- ☐ Model My Pay

☐ **Time Management**

Benefits
- ☐ Benefits Summary
- ☐ Manage My Benefits
- ☐ Beneficiaries/Dependents
- ☐ Investments
- ☐ PTO Plans

Myself ⋮

Personal ⌃

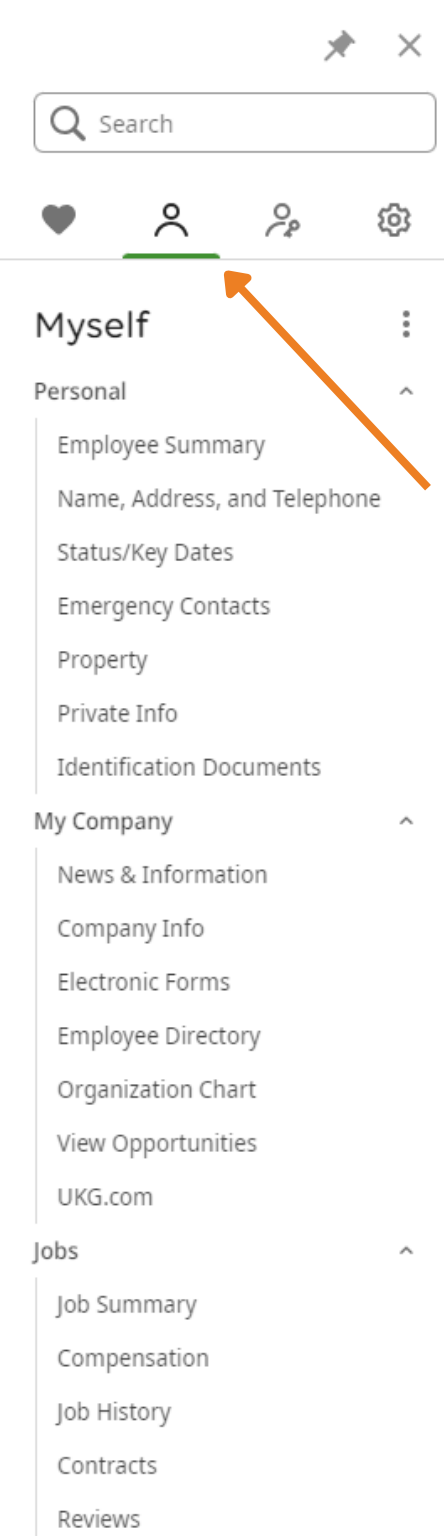Employee Summary

Name, Address, and Telephone

Status/Key Dates

Emergency Contacts

Property

Private Info

Identification Documents

My Company ⌃

News & Information

Company Info

Electronic Forms

Employee Directory

Organization Chart

View Opportunities

UKG.com

Jobs ⌃

Job Summary

Compensation

Job History

Contracts

Reviews

NAVIGATING YOUR ACCOUNT

PERSONAL

- **Employee Summary** – This feature shows you personal demographic information, date of hire, job title, time in service, supervisor, etc. For non-exempt employees only, you can view your Time Clock Pin here.

- ★**Name, Address, and Telephone** – You can make edits to this data. Once submitted, HR will need to approve.

- **Status/Key Dates** – This shows you important dates such as hire, rehire, retirement, etc.

- ★**Emergency Contacts** – Can be added or updated here.

- **Property** – In time, IT and Accounting will be able to provide your company property inventory such as equipment and credit cards.

- **Private info** – Only visible to you and HR, this is where your social, DOB, I-9, EEOC, disability, and vet status would be.

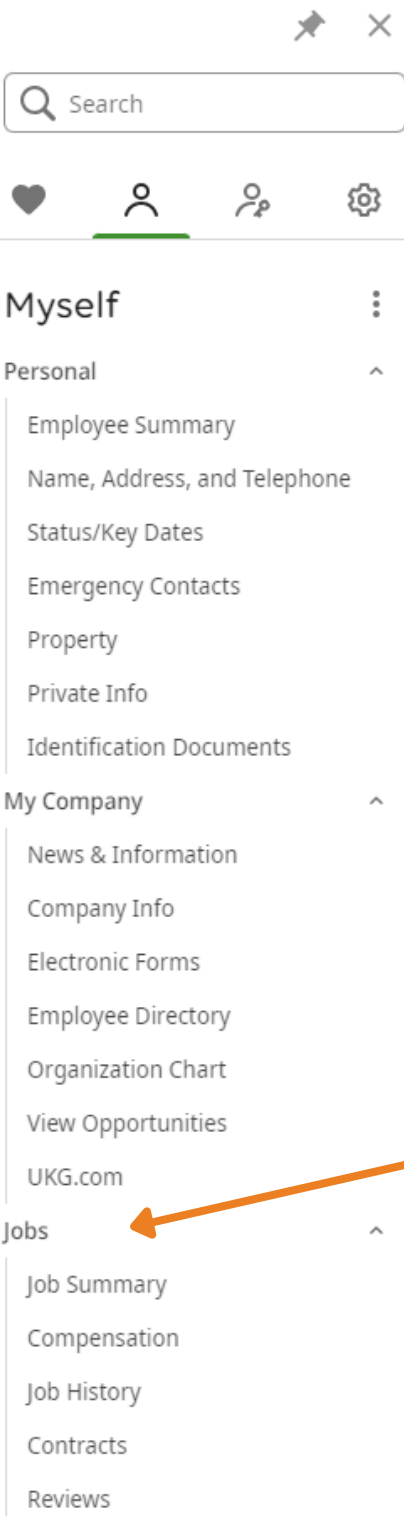- **Identification Documents** – Can be housed here for new hires.
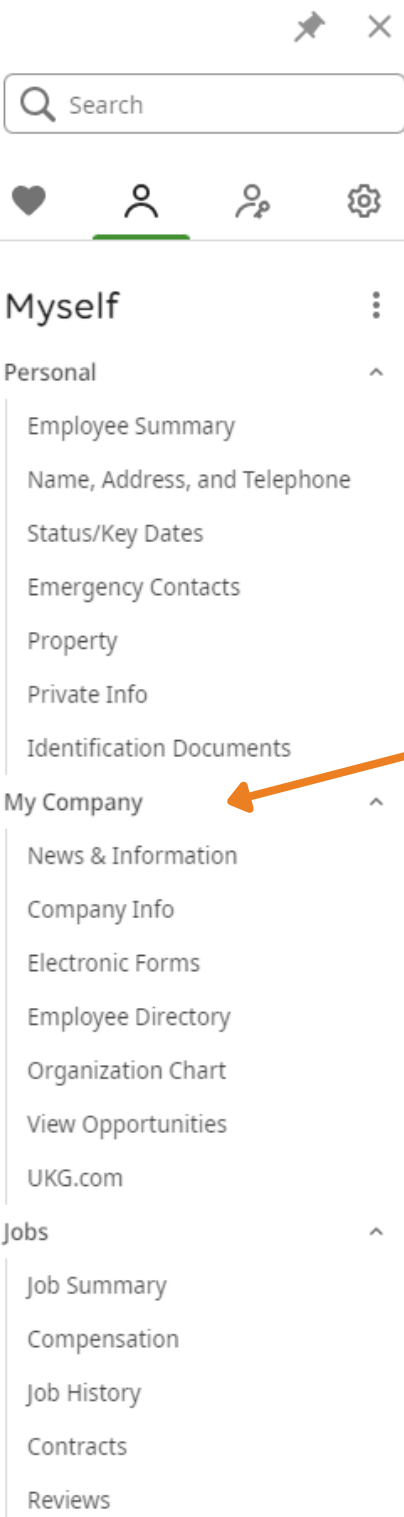
NAVIGATING YOUR ACCOUNT

MY COMPANY

- **Company Info** – Where you can see a broadcast of announcements to employees from HR.
- **Electronic Forms** – You can upload content or documents from your personnel file or anything else you would like to add to your digital file.
- **Employee Directory** – This is where you are able to search for U.S. employees and their telephone numbers or email addresses.
- **Organization Chart** – You can view our company's Organization Chart here.
- **View Opportunities** – Where you can see what current opportunities are available at IAPMO.

Search

Myself

Personal
- Employee Summary
- Name, Address, and Telephone
- Status/Key Dates
- Emergency Contacts
- Property
- Private Info
- Identification Documents

My Company
- News & Information
- Company Info
- Electronic Forms
- Employee Directory
- Organization Chart
- View Opportunities
- UKG.com

Jobs
- Job Summary
- Compensation
- Job History
- Contracts
- Reviews

Myself

Personal

Employee Summary
Name, Address, and Telephone
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Job Summary
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Contracts
Reviews
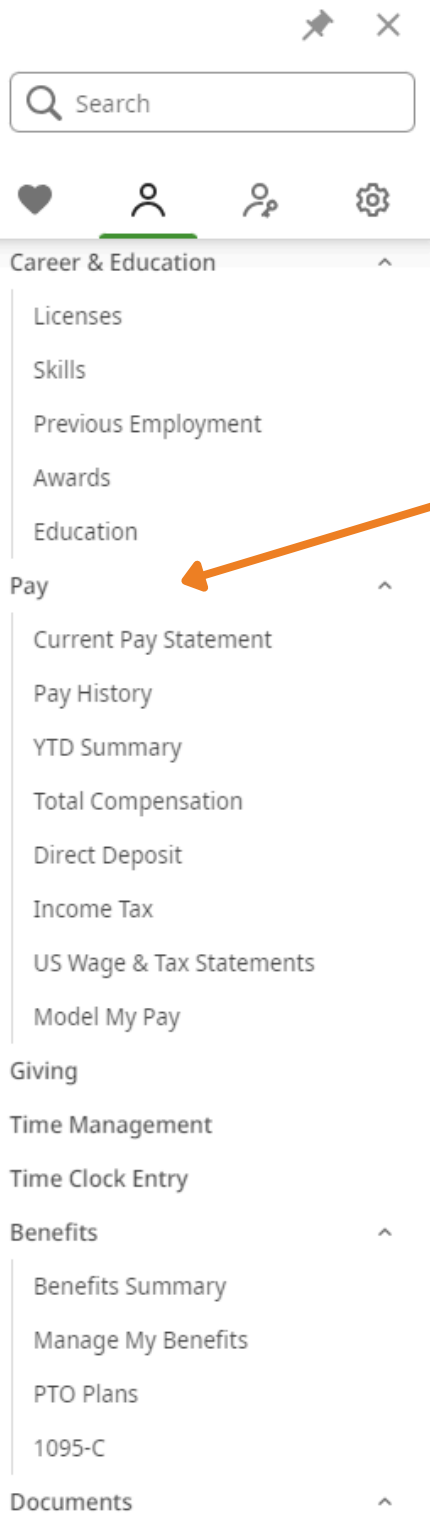
NAVIGATING YOUR ACCOUNT

JOBS

- **Job Summary** - Here is a quick summary of details of your role and time of service. For non-exempt employees only, you can view your Time Clock Pin here.
- **Compensation** - Shows you the rate you are currently being compensated at in a yearly, semi, and hourly format.
- **Job History** - Here will be a history of roles you have held within the organization.
- **Reviews** - Yearly reviews can be added/updated here.
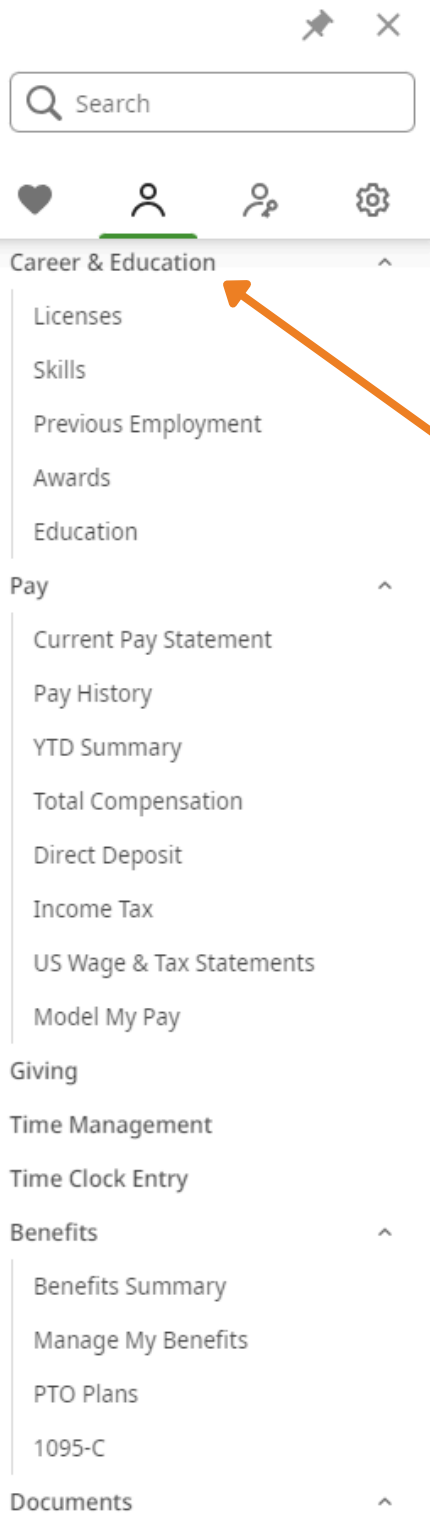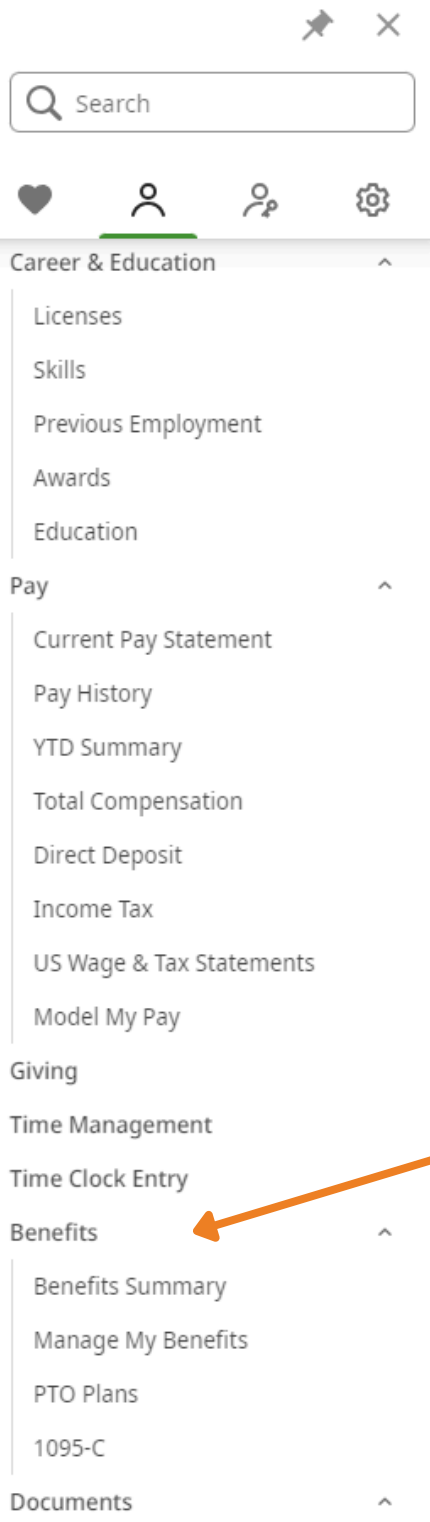
NAVIGATING YOUR ACCOUNT

CAREER & EDUCATION

- **Licenses** - You can add your licenses and certificates here or we can upload them for you.
- **Previous Employment** - Add your previous employment here.
- **Awards** - Add your awards and recognitions or we can upload them for you.
- **Education** - Send us a copy of your degree and we'll upload it here for you.

Search

Career & Education

Licenses
Skills
Previous Employment
Awards
Education

Pay

Current Pay Statement
Pay History
YTD Summary
Total Compensation
Direct Deposit
Income Tax
US Wage & Tax Statements
Model My Pay

Giving

Time Management

Time Clock Entry

Benefits

Benefits Summary
Manage My Benefits
PTO Plans
1095-C

Documents

Career & Education ∧

Licenses

Skills

Previous Employment

Awards

Education

Pay ∧

Current Pay Statement

Pay History

YTD Summary

Total Compensation

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Income Tax

US Wage & Tax Statements

Model My Pay

Giving

Time Management

Time Clock Entry

Benefits ∧

Benefits Summary

Manage My Benefits

PTO Plans
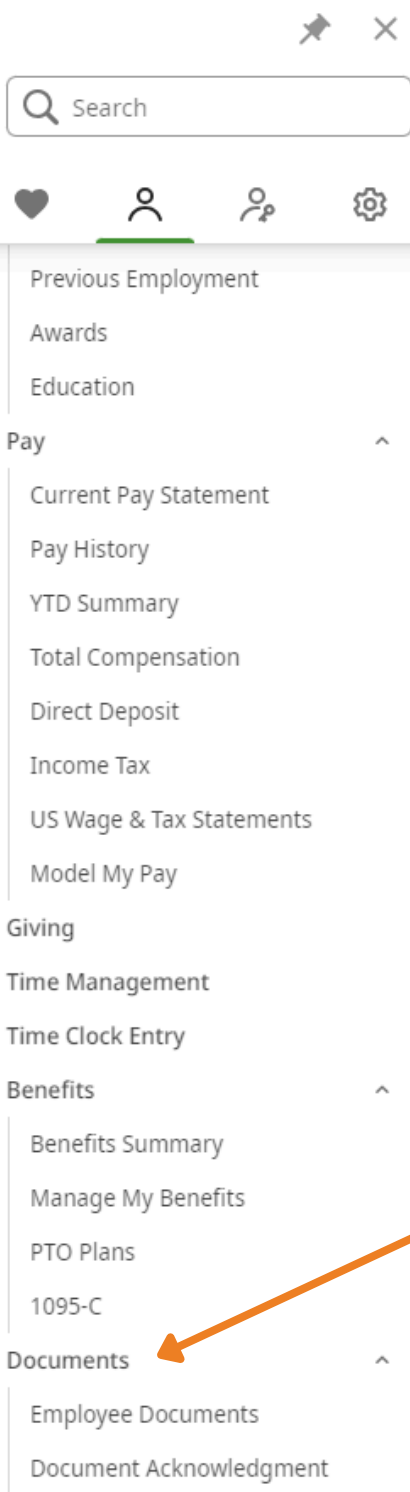
1095-C

Documents ∧

NAVIGATING YOUR ACCOUNT

PAY

- **Current Pay Statement** - Find your most recent pay statement of earnings and deductions here.
- **Pay History** - Where all you pay statements will be saved.
- **YTD Summary** - Provides Year to Date totals on all pay/earning and deduction codes and taxes.
- **Total Compensation** - Shows annualized totals of non-work earnings, employer paid benefits and employer paid taxes.
- **Direct Deposit** - Add or delete Direct Depost information here.
- ★**Income Tax** - Federal and State deductions are here.
- ★**U.S. Wage and Tax Statements** - Your Form W-2 can be found here.
- **Model My Pay** - Calculate your take home pay here, you can adjust your earnings and deductions to see what it would be if you make any changes.

Career & Education

Licenses

Skills

Previous Employment

Awards

Education

Pay

Current Pay Statement

Pay History

YTD Summary

Total Compensation

Direct Deposit

Income Tax

US Wage & Tax Statements

Model My Pay

Giving

Time Management

Time Clock Entry

Benefits

Benefits Summary

Manage My Benefits

PTO Plans

1095-C

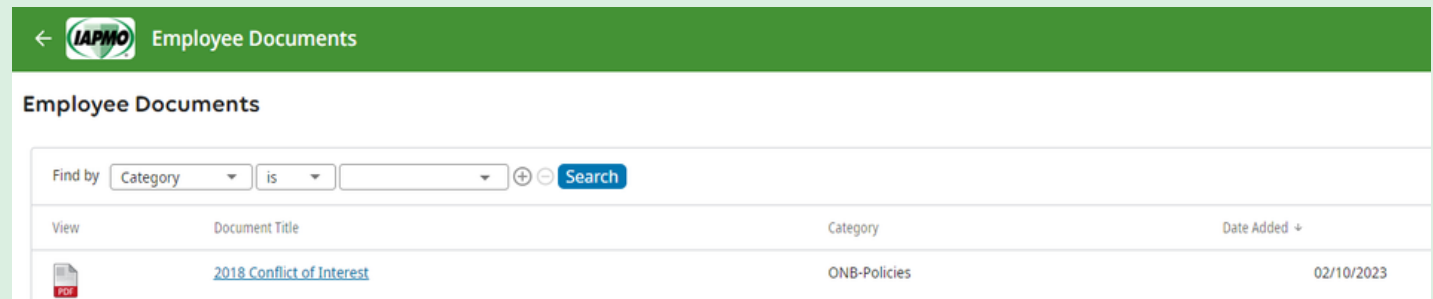## Documents

NAVIGATING YOUR ACCOUNT

BENEFITS

- **Benefits Summary** – You can view your current benefit deductions here.
- **Manage My Benefits** – You can make edits here during your benefits eligibility period, which begins on the first of the month following 30 consecutive days of employment, during the annual Open Enrollment period, or if you have a qualifying life event. Once you make edits, they get submitted to HR for approval.
- **1095-C** – View copies of your 1095-C document here for your tax records.

Left sidebar navigation

Search

Previous Employment
Awards
Education

Pay ^
Current Pay Statement
Pay History
YTD Summary
Total Compensation
Direct Deposit
Income Tax
US Wage & Tax Statements
Model My Pay

Giving

Time Management

Time Clock Entry

Benefits ^
Benefits Summary
Manage My Benefits
PTO Plans
1095-C

Documents ^
Employee Documents
Document Acknowledgment

NAVIGATING YOUR ACCOUNT

DOCUMENTS

- **Employee Documents** - All the employee documents you signed in the onboarding process will be uploaded here. Any new documents that you sign later on (ex. job descriptions, offer letters, etc.) will also be uploaded here.
- Remember to click on the 📄PDF to download the document.

IAPMO Employee Documents

Employee Documents

Find by [Category ▾] [is ▾] [_____ ▾] ⊕ ⊖ [Search]

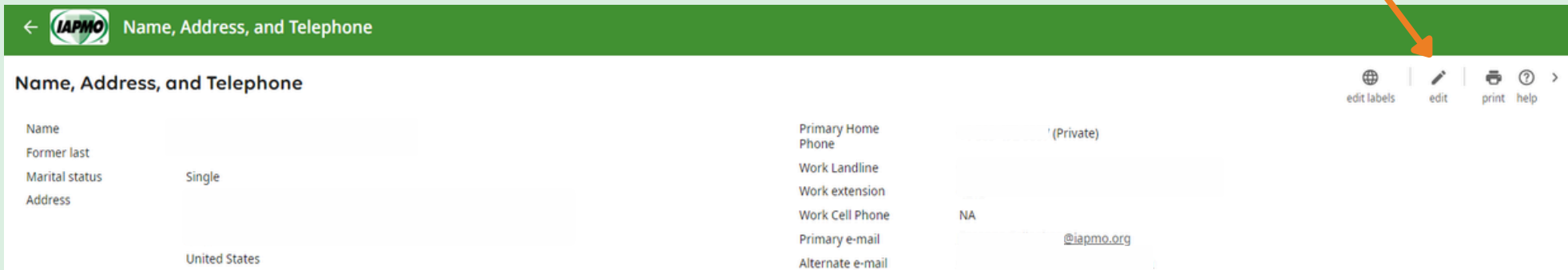| View	Document Title	Category	Date Added ↓
📄PDF	2018 Conflict of Interest	ONB-Policies	02/10/2023

- **Document Acknowledgement** - Any new company policies or acknowledgments will be posted here.

HOW TO:
UPDATE PERSONAL INFORMATION

PERSONAL >> NAME, ADDRESS, AND TELEPHONE

- Personal information can be edited by clicking on the "Edit" ✎ button on the top-right corner of the Personal tab. Simply select the button and follow the instructions.
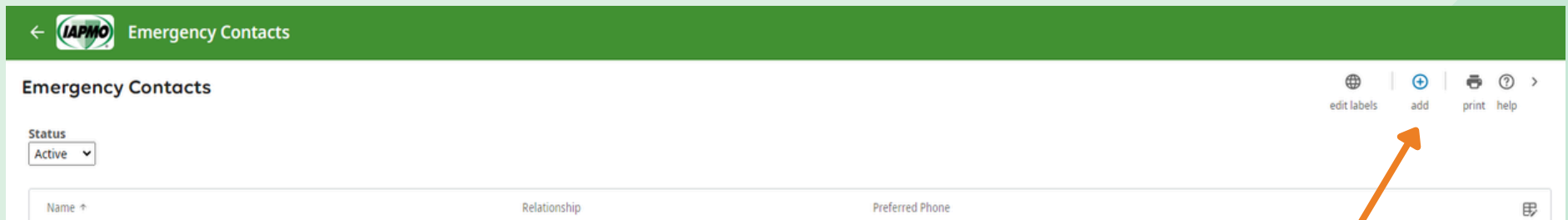
← (IAPMO) Name, Address, and Telephone			
Name, Address, and Telephone		edit labels edit print help	
Name		Primary Home Phone	' (Private)
Former last		Work Landline	
Marital status	Single	Work extension	
Address		Work Cell Phone	NA
		Primary e-mail	@iapmo.org
	United States	Alternate e-mail	

- NOTE: Press "Save" to submit your changes.
Once submitted, HR will need to approve it in the system.
Only information that you have been given to change will display the "Edit" button at the top right.

HOW TO:

MANAGE CONTACT INFORMATION

PERSONAL >> EMERGENCY CONTACT

- Select the "+" button on the Personal/Contacts screen to add a new Emergency Contact.
- You can select the name of a current contact to update it.

NOTE: To add a person to a benefit such as medical or dental, you will need to use Life Events under Myself >> Manage my Benefits >> Life Event
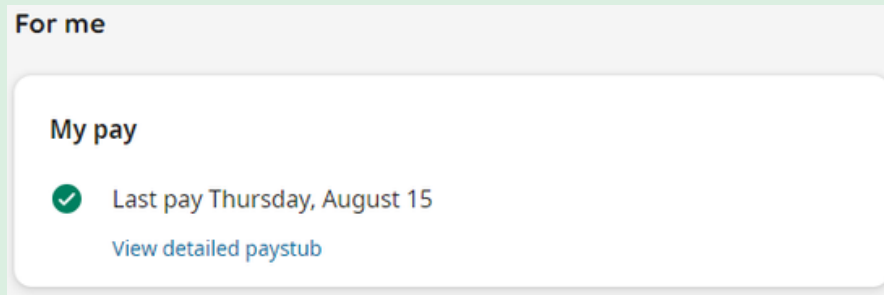
HOW TO:
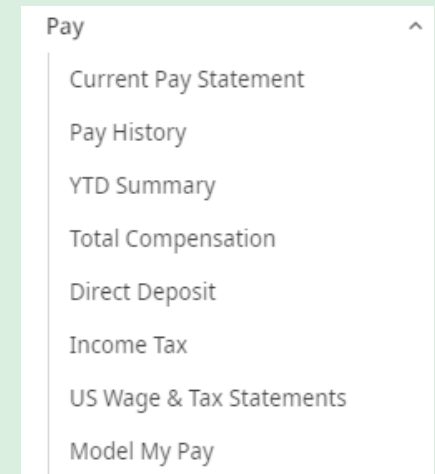
VIEW PAY STATEMENT INFORMATION

PAY >> CURRENT PAY STATEMENT

- You can access your pay statement by clicking on the 1) My Pay Widget on the homepage or under 2) Myself >> Pay>> Current Pay Statement. 3) Download or print your pay statements from the top right corner of the Statement screen.
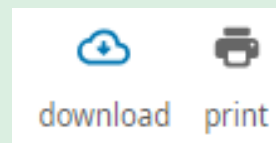
1)

For me

My pay

✓ Last pay Thursday, August 15

View detailed paystub

3)

☁ 🖨
download   print

2)

Pay	^
Current Pay Statement	
Pay History	
YTD Summary	
Total Compensation	
Direct Deposit	
Income Tax	
US Wage & Tax Statements	
Model My Pay	

HOW TO:

CHECK WITHHOLDINGS

PAY >> INCOME TAX

- View your tax exemptions here.
- You can also view your W-2's under Pay >>> U.S. Wage and Tax Statements whenever they are available.

ACTION ITEMS:

- Review all training materials on the HR Website.
- Set up your UKG account.
- Verify that all the information in your account is correct.

QUESTIONS?

CONTACT US!

PAYROLL/UKG ASSISTANCE

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BREANNA CALLAGHAN

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ashley.fuentes@iapmo.org