Dayforce Training Guide

Employee Profile

Umbrella Family and Child Centres of Hamilton

Good care educates. Good education cares.

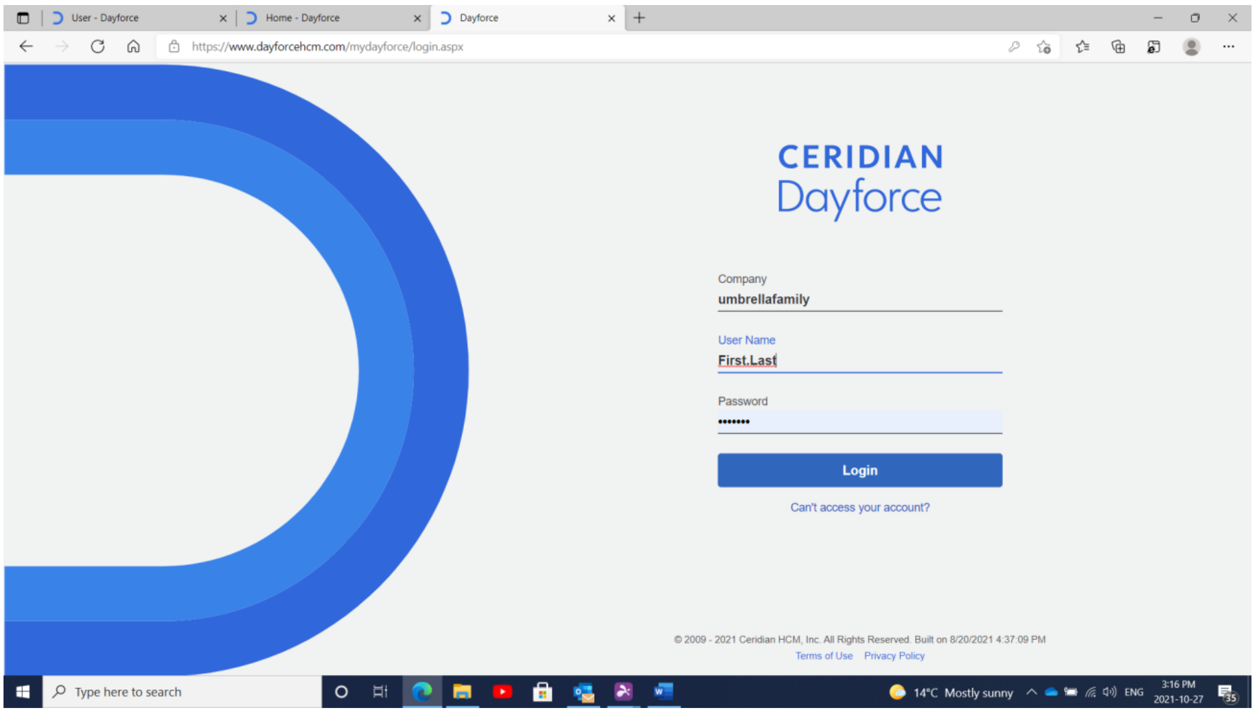
Contents

Section 1: Employee Login

How to Log In

Instructions for first time users of Dayforce:

Open website: https://www.dayforcehcm.com/



1. At the login screen, enter the following 3 fields:
   Company: **umbrellafamily**
   Username: **First.Last name**
   Password: **Lastname.four digits for birth year**
2. After you login, you will be prompted to create your own personal password which has to be a minimum of 6 characters. Please use something easy for you to remember but private so you are the only person able to access.
3. If you have difficulty logging in or forget your password please contact us at dayforcesupport@umbrellafamily.com for assistance.

Navigation

There are three main ways to navigate across the application:
1. The navigation panel
2. Your favorite features in **Home**
3. Global Search (located in the toolbar)

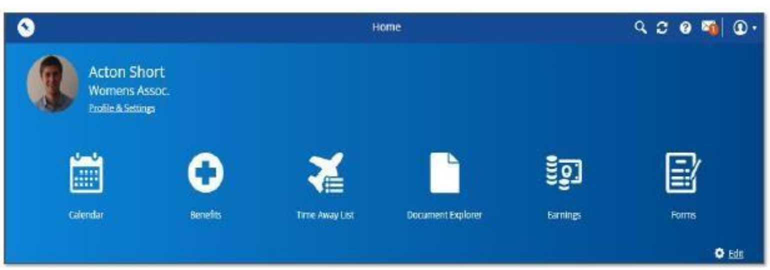
The image below provides an overview of where each of these items is in the application:

Section 2: Home Screen

Introduction to Home Screen

You can access your most frequently used features on the home screen. Depending on screen size, you can set up to 6 favorites. If your screen size does not allow for all six to be displayed, the application only displays as many as it can.

By default, the features you have access to will be listed in alphabetical order on the Favorites bar.

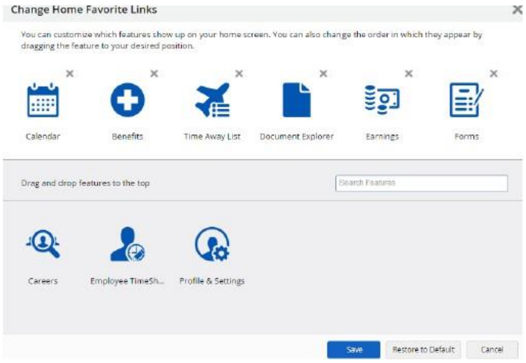


Personalize Your Home Screen Favorites

From the **Home Screen**, you have the ability to control which features are your own favorites based on your preferences.

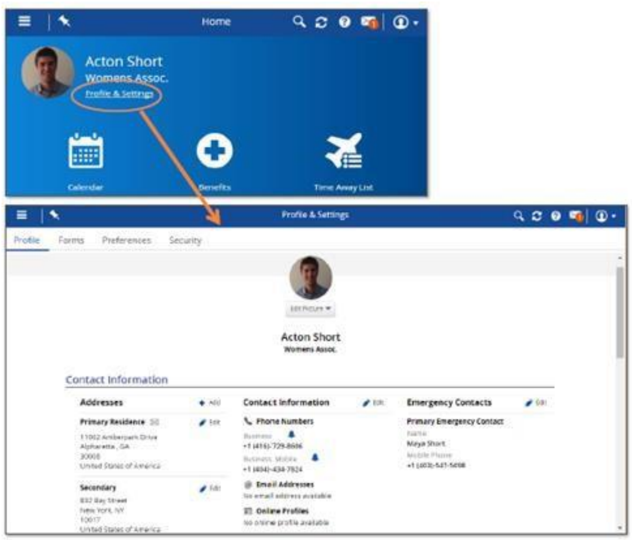
1. Click the **Edit** button.

2. This displays the **Change Home Favorite Links** control.



Profile Settings

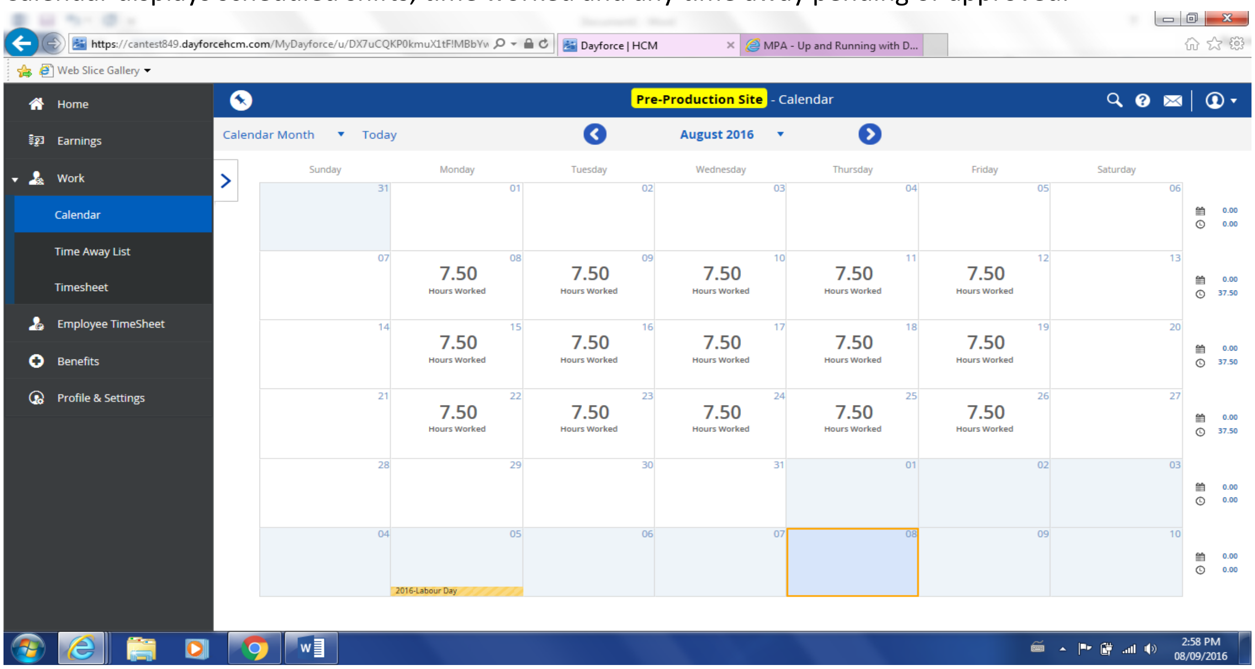
This section is for employee self-service features: Profile, Preferences, Security, and Forms. You can click on the **Profile & Settings** link to navigate to these features.



Section 3: Work Calendar

Introduction to Work Calendar

You can manage your schedule and request time away under the Work tab on the left-hand menu. The Calendar displays scheduled shifts, time worked and any time away pending or approved.



Section 4: Time Away

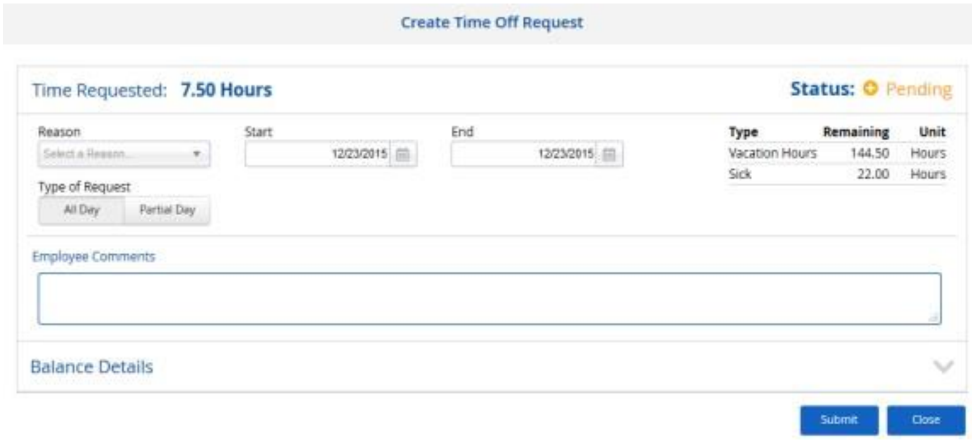
Make a Time Away Request

You can request time away from work for a single day or a range of dates in the **Work > Time Away List** feature.

To request time away from work:

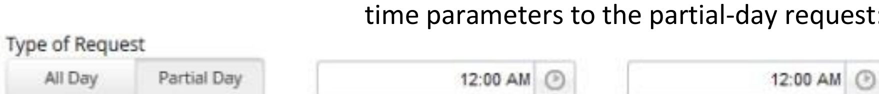
1. In **Work > Time Away List**, click the **Request New Time Off** button:

The **Create Time Off Request** slide-out panel opens:



2. Select the reason for the time off from the **Reason** drop-down list.
3. Select the date(s) you are requesting away from work. Select the same date for the **Start** and **End** fields to request one day.
4. In the **Type of Request** section, do one of the following depending on whether you're requesting a full day or partial day off work:
   - ○If you are requesting entire days off work, click the **All Day** button:

   - ○If you are requesting a partial day off, click the **Partial Day** button: ○ The application adds time parameters to the partial-day request:



   - ○ Type the start and end times of your request directly into the **Start** and **End** fields

5. To view your available balances, click the button. The application expands this section:

6. Type additional information, if necessary, in the **Employee Comments** text box. These are sent to your manager along with the time away from work request.

7. When you are done recording the details of your request, click the **Submit** button.

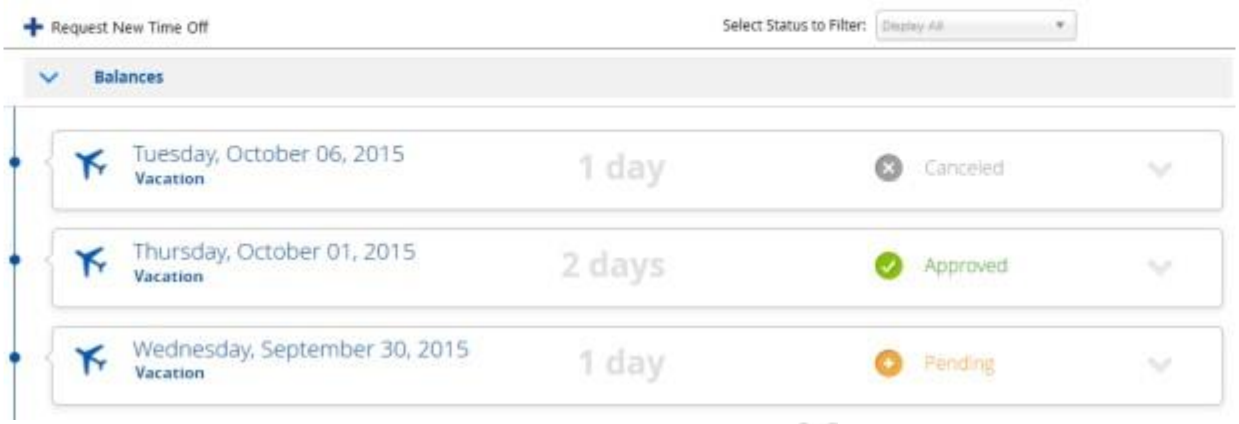
After you submit a time away from work request, it is automatically sent to your manager for review and approval. Once it is approved, the application marks this time on the calendar.

Approved requests are marked with a green check mark, rejected requests are displayed with a red 'x', and requests your manager hasn't responded to yet are displayed with an orange circle and labeled Pending.

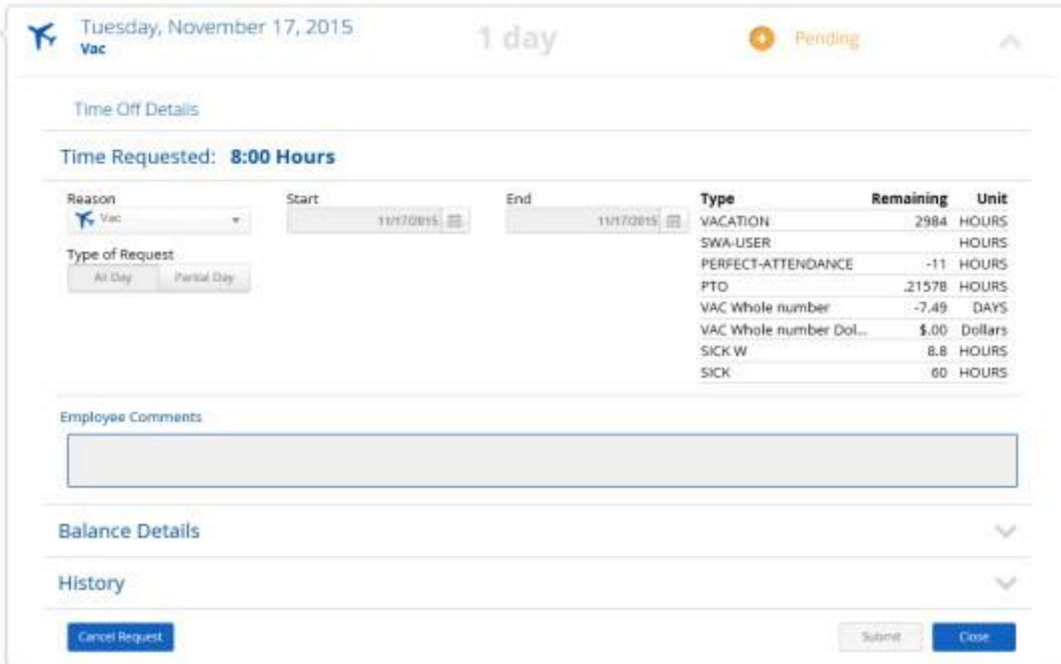
If you later need to cancel your time away, expand the request in the list and click the **Cancel Request** button.

View and Edit Existing Time Away Requests

When you open **Work > Time Away List**, the application displays your existing requests:



You can view more information about each request by clicking the button. The application expands the request directly in the list:



For pending requests, you can edit the details of the request directly from this expanded view. You can also click **Balance Details** to view information about your available balances, and click **History** to view the history of the request.

You can cancel approved requests by clicking **Cancel Request**.

Note: If the request has not been approved, the request will be deleted. If a manager has approved the time off already, the request will turn to pending until the manager cancels the request.

Filter Time Away Requests - You can filter time away from work requests by status. To filter your time away requests, select a status from the **Select Status to Filter** drop-down list. For example, if you only want to view your approved time away requests, select **Approved** from the **Select Status to Filter** drop-down list.

Accrued Balances

The balances on the earning statement reflect as of the pay period end.
*Balances do NOT include the current pay period accrual.
*The current pay period accrual will reflect on the next earning statement.

The balances in Dayforce reflect as of the pay period begin.
*Balance includes the current pay period accrual.
*Future time off requested/approved through the end of the calendar year is deducted.
*Reduced balance reflects on employee view only to help schedule time off.
*Balance is NOT reduced on the payroll side until it processes through the payroll run.

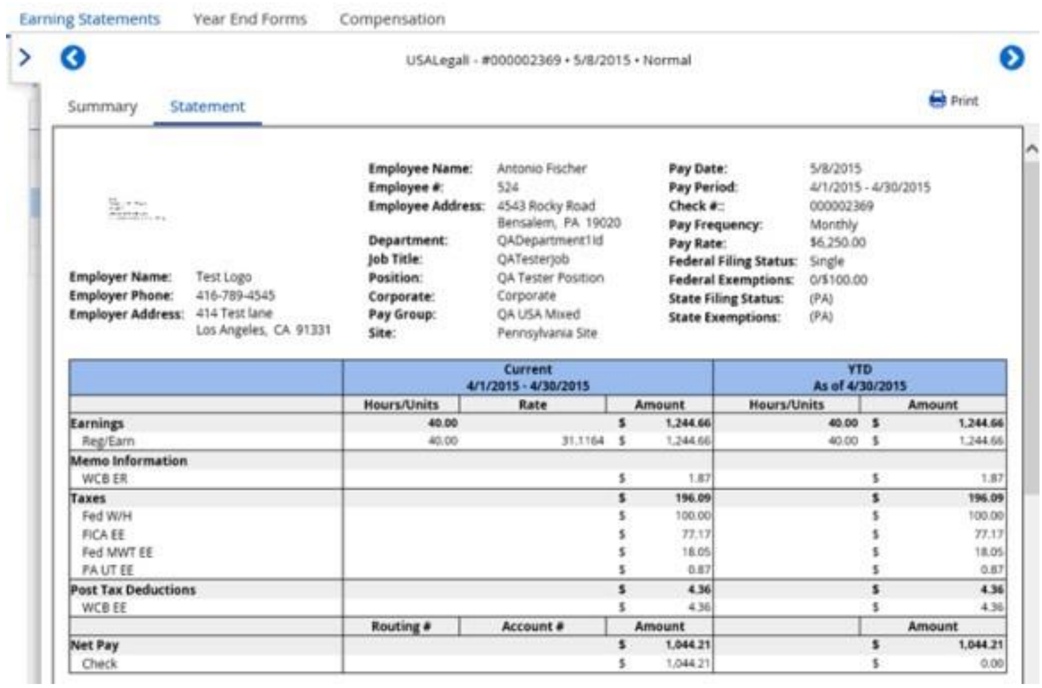
Earnings

Earning Statements

This section describes how to view and print your earning statements for current and past pay periods.

You access your earning statements is Earnings and print them:

1. Click **Earnings** from the navigation panel on the left.
2. Select the **Earnings Statements** tab and click the arrow button to expand the view
3. Select the earning statement/form you want to view.
4. To view the earning statement, click the **Statement** tab.
5. Click the **Print** button to open the **Print** dialog.
6. Click the **Print** button.



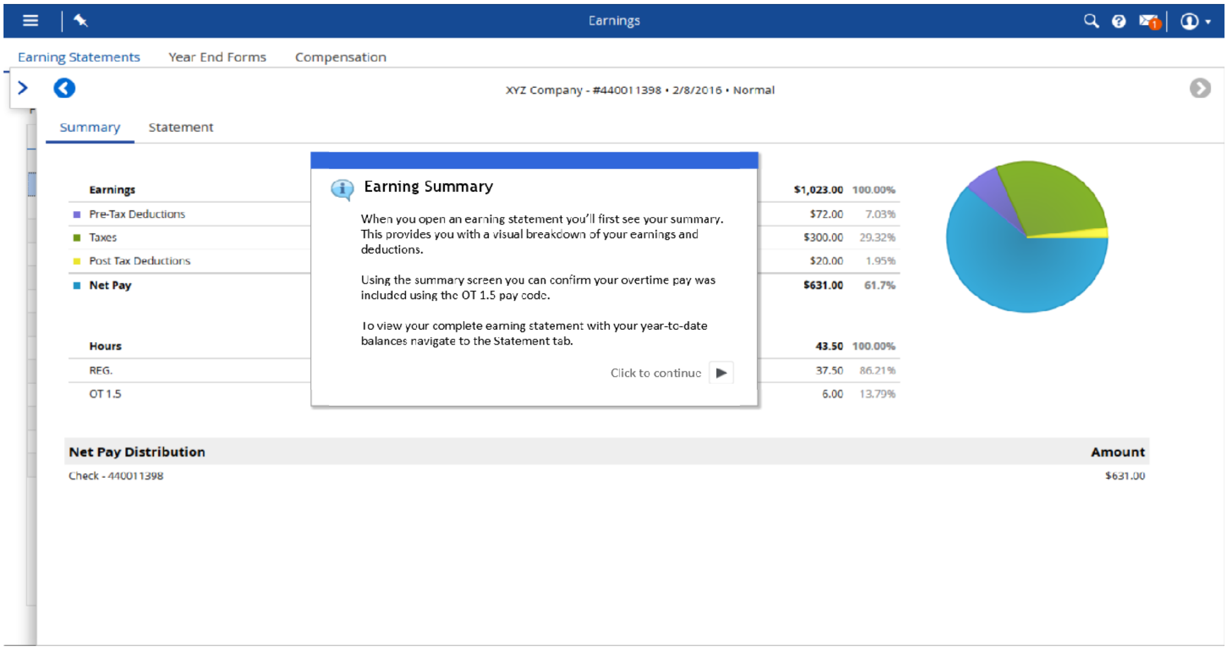
Employee Name: Antonio Fischer
Employee #: 524
Employee Address: 4543 Rocky Road, Bensalem, PA 19020
Department: QADepartment1Id
Job Title: QATesterjob
Position: QA Tester Position
Corporate: Corporate
Pay Group: QA USA Mixed
Site: Pennsylvania Site

Pay Date: 5/8/2015
Pay Period: 4/1/2015 - 4/30/2015
Check #: 000002369
Pay Frequency: Monthly
Pay Rate: $6,250.00
Federal Filing Status: Single
Federal Exemptions: 0/$100.00
State Filing Status: (PA)
State Exemptions: (PA)

Employer Name: Test Logo
Employer Phone: 416-789-4545
Employer Address: 414 Test lane, Los Angeles, CA 91331

	Current 4/1/2015 - 4/30/2015			YTD As of 4/30/2015	
	Hours/Units	Rate	Amount	Hours/Units	Amount
Earnings	40.00		$ 1,244.66	40.00	$ 1,244.66
Reg/Earn	40.00	31.1164	$ 1,244.66	40.00	$ 1,244.66
Memo Information					
WCB ER			$ 1.87		$ 1.87
Taxes			$ 196.09		$ 196.09
Fed W/H			$ 100.00		$ 100.00
FICA EE			$ 77.17		$ 77.17
Fed MWT EE			$ 18.05		$ 18.05
PA UT EE			$ 0.87		$ 0.87
Post Tax Deductions			$ 4.36		$ 4.36
WCB EE			$ 4.36		$ 4.36
	Routing #	Account #	Amount		Amount
Net Pay			$ 1,044.21		$ 1,044.21
Check			$ 1,044.21		$ 0.00

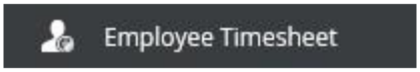
Earnings Summary


Earnings
Earning Statements
Year End Forms
Compensation
XYZ Company - #440011398 • 2/8/2016 • Normal
Summary
Statement
Earnings
Pre-Tax Deductions
Taxes
Post Tax Deductions
Net Pay
Hours
REG.
OT 1.5
Earning Summary
When you open an earning statement you'll first see your summary. This provides you with a visual breakdown of your earnings and deductions.
Using the summary screen you can confirm your overtime pay was included using the OT 1.5 pay code.
To view your complete earning statement with your year-to-date balances navigate to the Statement tab.
Click to continue
$1,023.00 100.00%
$72.00 7.03%
$300.00 29.32%
$20.00 1.95%
$631.00 61.7%
43.50 100.00%
37.50 86.21%
6.00 13.79%
Net Pay Distribution
Amount
Check - 440011398
$631.00

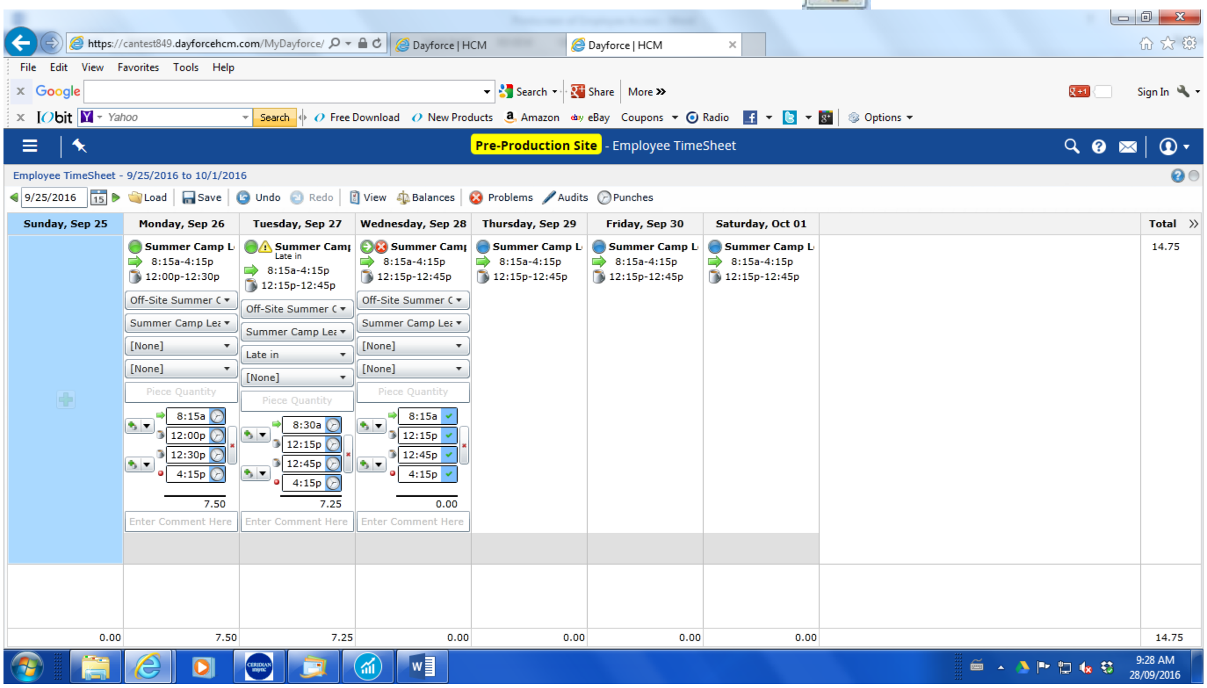
Section 5: Employee Timesheet

Viewing Your Timesheet

You can access your timesheets by clicking **Employee Timesheet** from the home screen on the navigation panel:



The timesheet allows you to record and view the times that you have worked throughout the week. Select the week you want to review using the calendar icon  and click the **Load** button.



Employee timesheet will load to the current work week. You can change the weeks by using the green arrows beside the date on the top left corner of the screen.

When you are in a week that has scheduled shifts you will be able to see the start and end times and the scheduled breaks. When you fill in your time worked you will click on the green check mark beside the time and that will then turn into a clock face. You would have to click on all of the check marks for the day to show the start and finish times of your attendance. If your hours were different than scheduled you can click where the time is and type in the actual time in and time out. If the dot beside the job title is <u>green then you have clocked you scheduled shift as posted</u> . If the dot has a <u>red X beside it that indicates you have not recorded your hours</u>. If the dot has a <u>yellow caution sign beside it indicates your shift is not exactly as scheduled </u>and would notify your Supervisor that there is something they should review.

Section 6: Profile and Settings

Changing your Address

Update your address:

1. Click **Forms.**
2. Click **Address Change - ESW** form.

3. Follow in structions How To Complete Form.

How to complete this form:

Step 1: End Date the current 'Primary Residence' and 'Mailing' address.

Step 2: Click the 'Add' button. Enter 'Primary Residence' information into blank fields.

Step 4: Click the 'Add' button again. Enter 'Mailing' address information into blank fields.

Step 5: Click twice on the 'Payroll Mailing' checkbox to remove from the old 'Mailing' address.

Step 6: Check 'Payroll Mailing' checkbox for new 'Mailing' Address.

Step 7: Click 'Submit'.

Note: DO NOT DELETE ANY ADDRESSES

4. You need to update both a ***primary residence*** address and ***mailing*** address.

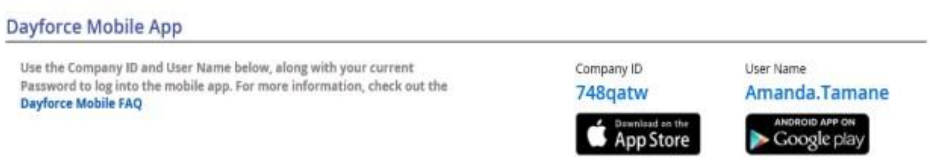
The ***mailing*** address will have the "payroll mailing" checked and the ***primary residence*** address will not.

Update Password & Security Questions

You can update your security settings and access links to download the mobile applications on the **Profile & Settings > Security** tab.

Dayforce Mobile App

The application displays information on the **Dayforce Mobile App**, including links to download the app on the App Store or Google Play, your Company ID and User Name, and a link to the Dayforce Mobile FAQ.

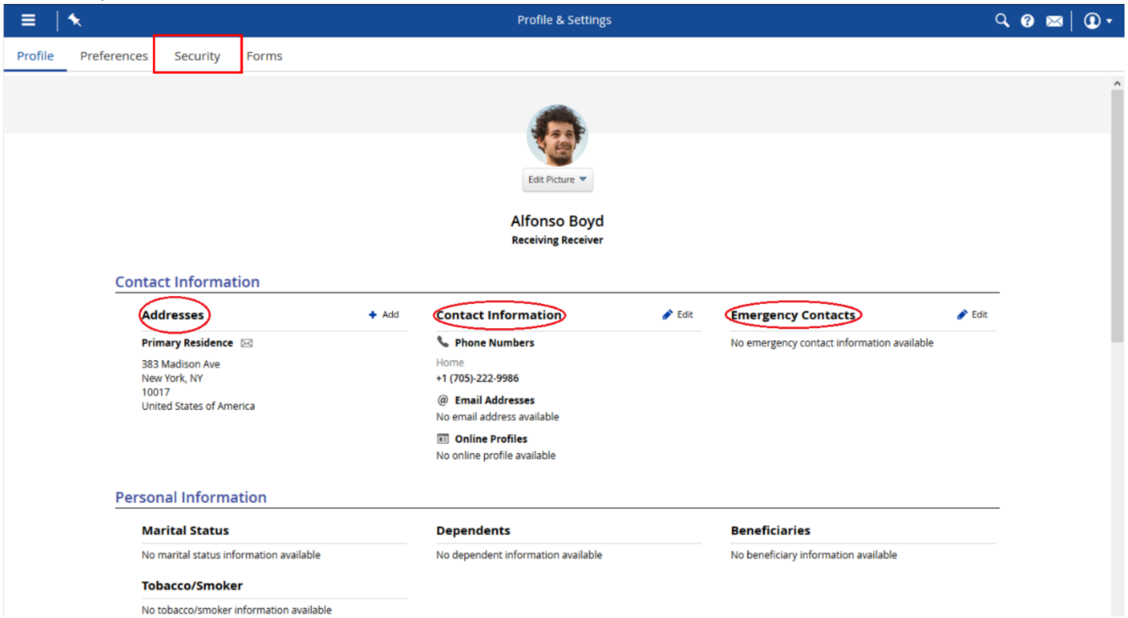


Update Your Security Settings

On the **Security Settings** widget, you can update your password, security questions, and PIN. **Update Password**

To update your password:

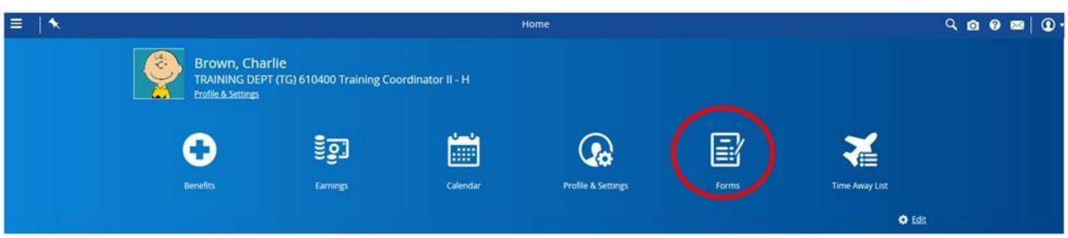
- Type your **Current Password** into the parameter.
- Type your **New Password** into the parameter, and type it again into the **Repeat Password** parameter.



View and Update Your Personal Information

View and Update your personal information, including your addresses, emergency contacts, name & marital status, contact information and direct deposit.

1. Click **Forms.**



2. Click the desired **Form.**

Update the form information and click **Submit**.