Staff Portal User Guide

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First Login

If your school district is using Single Sign On (SSO) the login information provided below regarding a temporary password does not apply to you if you have a valid work email account. If you do not have a work email account or your school is not using SSO, please follow the instructions below regarding your first login to the system.

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.

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.

4. Enter the temporary password you received in your email in the **Old Password** field.

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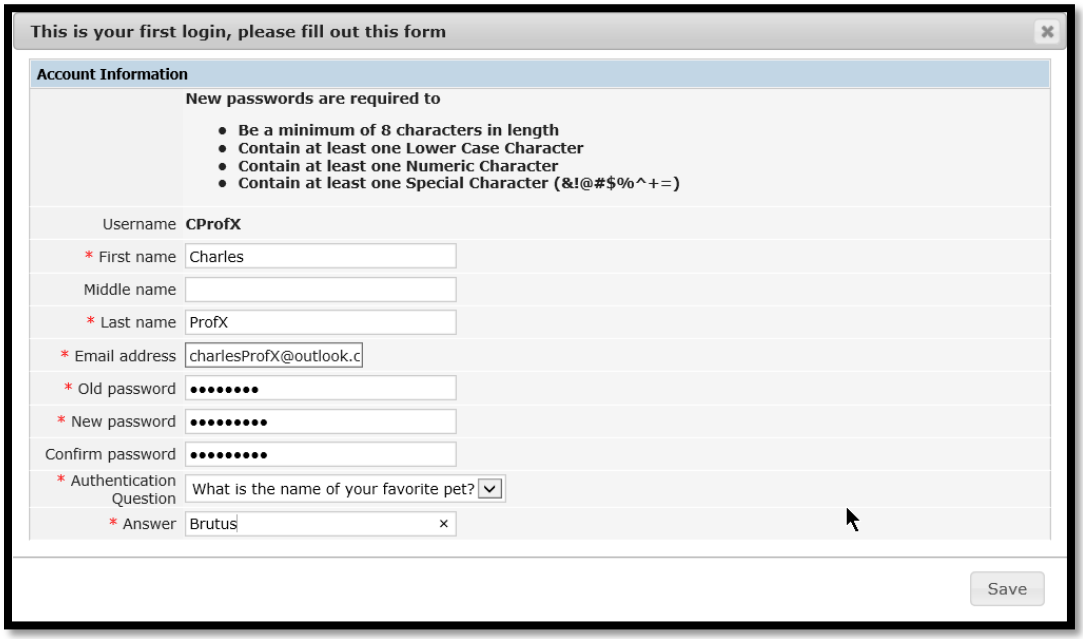
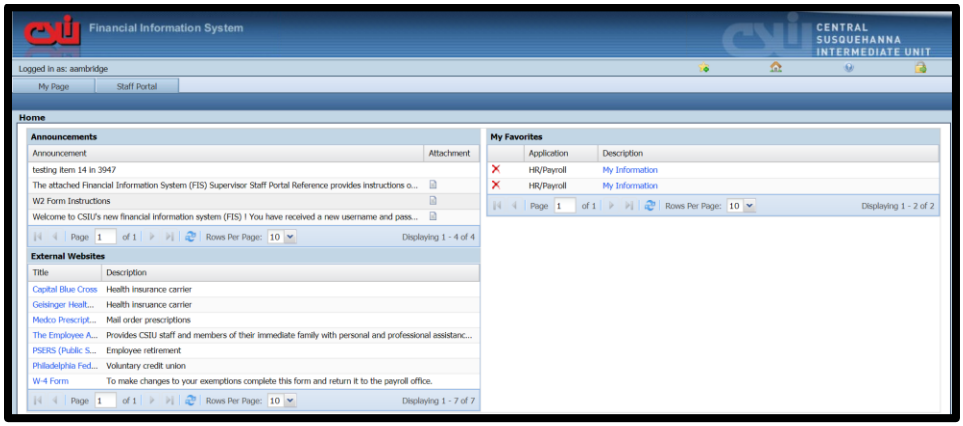
5. Enter a meaningful password in the **New Password** field. Please note that your new password must contain:
    - eight or more characters,
    - at least one numeric character,
    - one upper and lower case character,
    - and one special character (&!@#$%^+=).

    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.



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



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Home Page

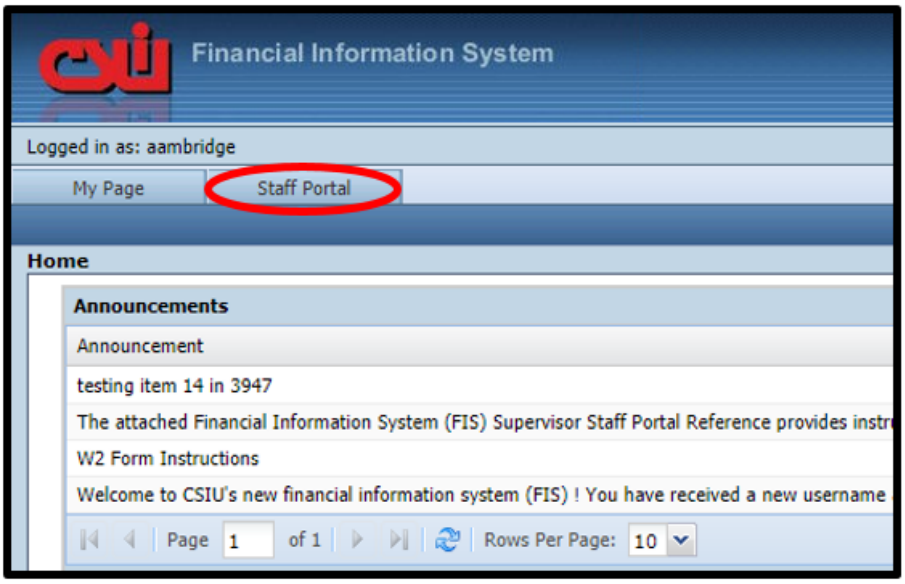
The Home page of the CSIU Staff Portal gives you access to the:

- 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.

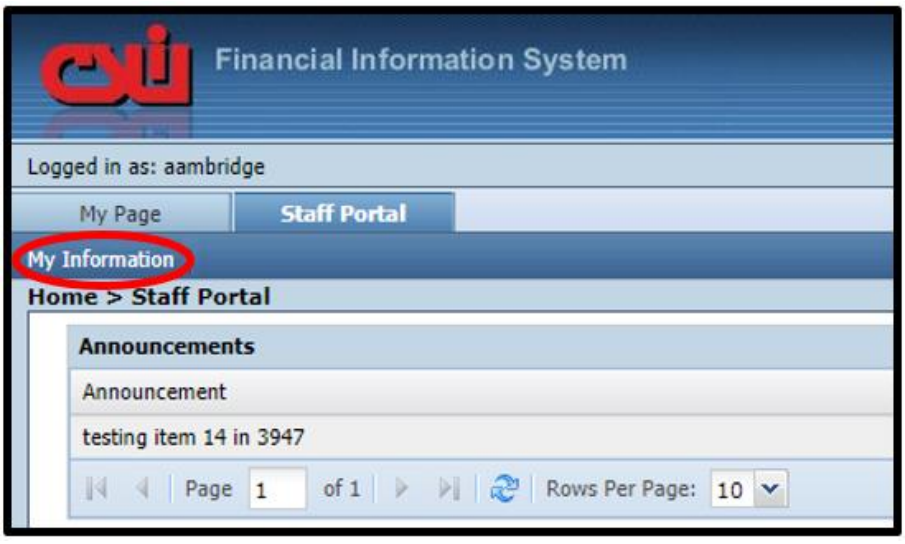
Staff Portal

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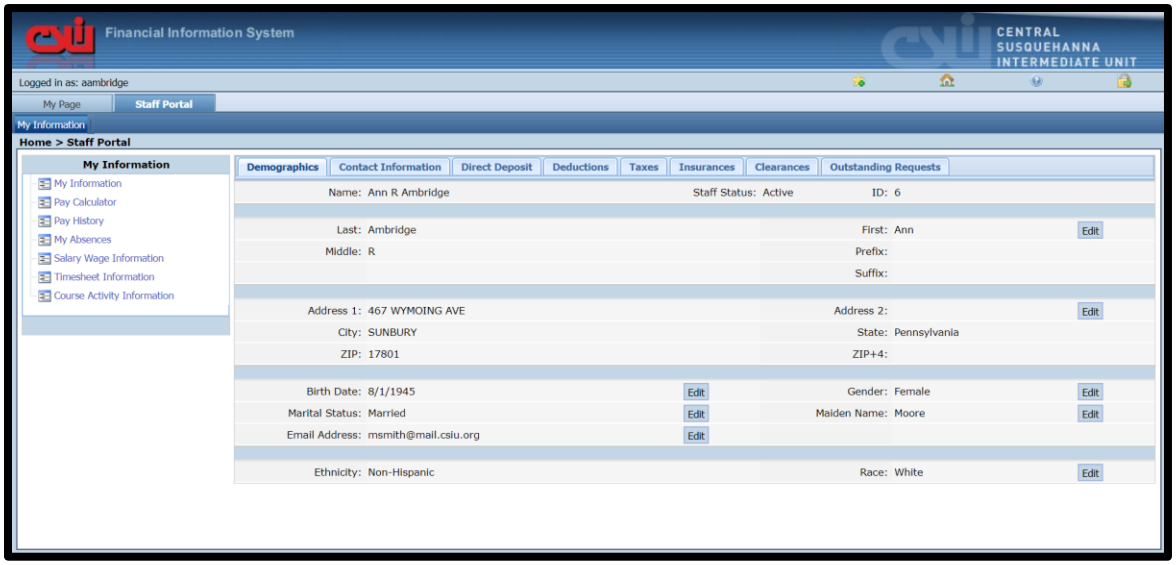
After you click the **My Information** tab, you will see additional menu options and by default you're my information screen that contains your Demographic, Contact Information, Direct Deposit, Deductions, Taxes, Insurance, Clearances, and Outstanding requests display based on the options that have been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



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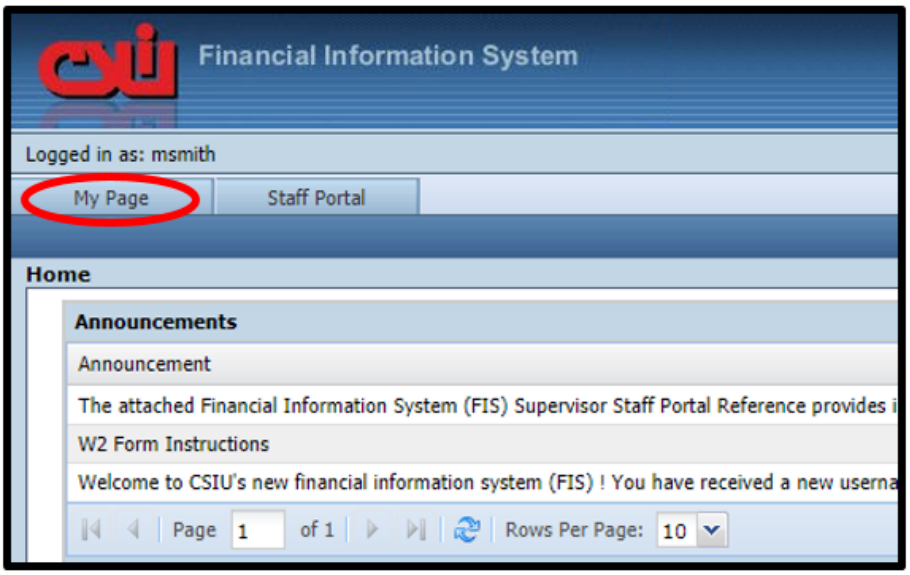
Timesheet Information
Allows you to enter your hours or days worked for a specific pay period if you need to submit a timesheet for payment.

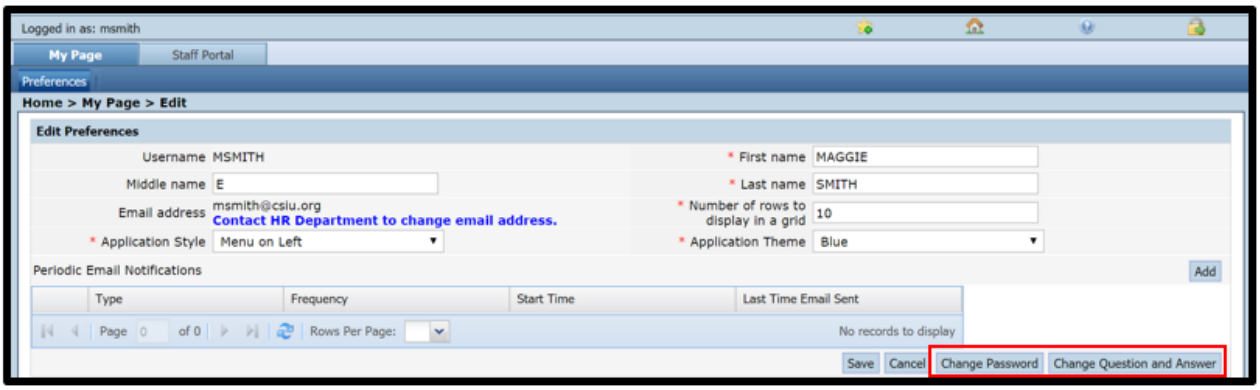
Course Activity Information
Allows you to view course/activity history information and register for an upcoming trainings. You can also request a reimbursement for a course that was approved for reimbursement.

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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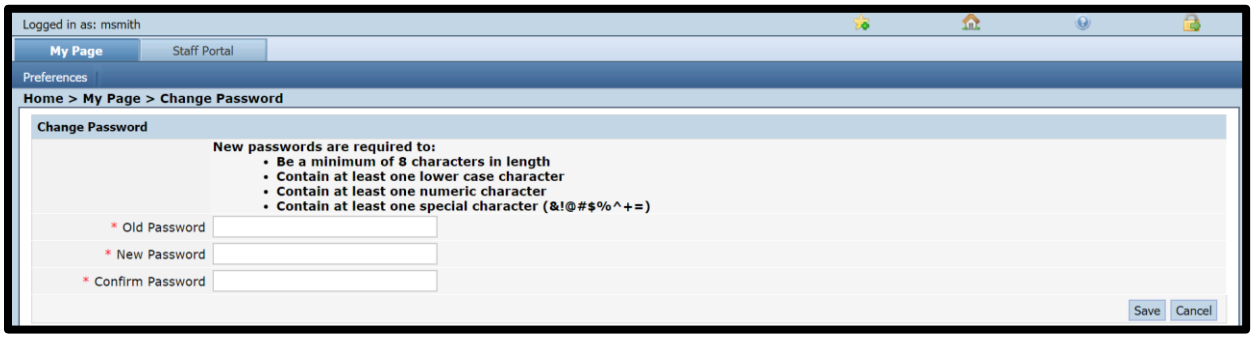
Change Password

To change your password, do the following:

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

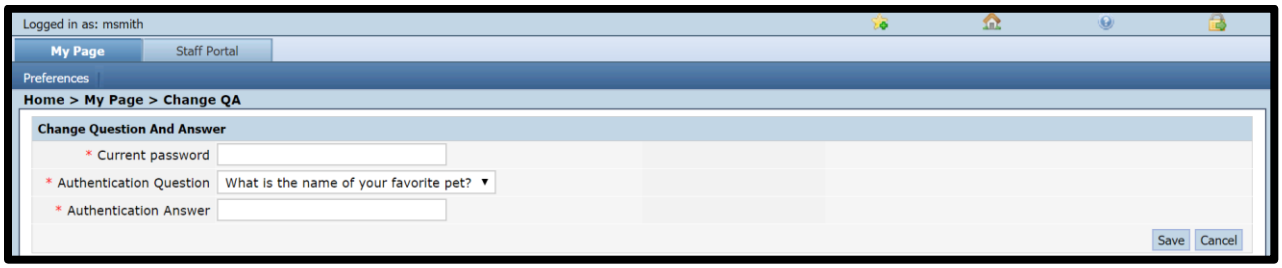


2. Enter your current password in the **Old Password** field.
3. Enter a new password in the **New Password** field. Note that your password must contain eight characters as well as one lower case, numeric and special characters.
4. Enter the new password again in the **Confirm Password** field.
5. Click 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.



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:

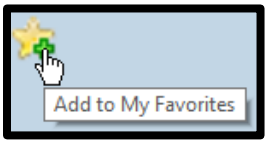
- Update your First, Middle and Last names using the name fields. This does not change the information on your staff record.

- 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.

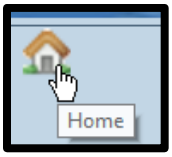
Additional Navigation Tools

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.

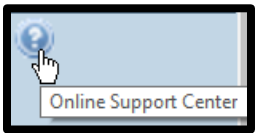
From left to right, the following icons allow you to perform various functions. Please note that some options may not be available to you.



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.

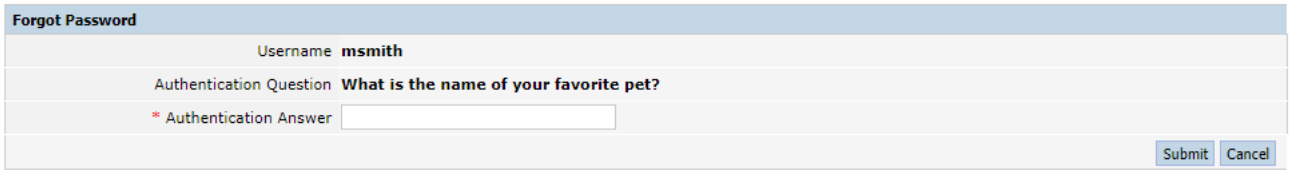
NOTE: Accounts are locked after three failed attempts to log in. It's advised that you use the Forgot Password option after the second attempt. If you are you locked out, you will need to contact the system admin to unlock your account.

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.

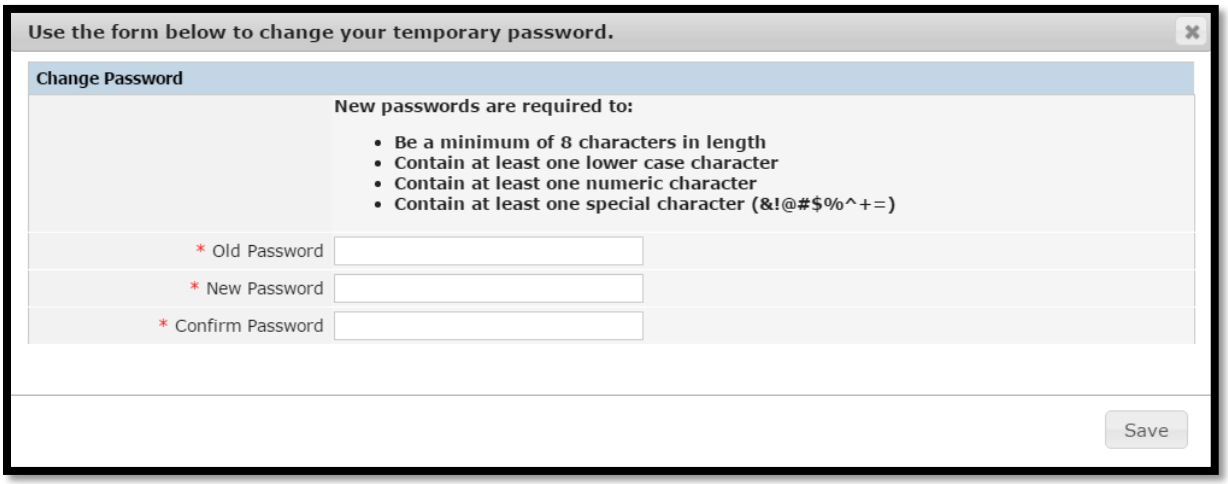


5. Click the submit button.

a. If your answer was correct, you will receive a prompt that your new password has been sent to your email address on file. *Skip to number 6*.
b. If your answer is incorrect, you will receive the 'The answer provided is incorrect' message.

NOTE: If your email address is incorrect or if you cannot remember your authentication answer, you will need to contact your System Administrator or your Human Resources department.

6. Check your email.
7. Log into the CSIU Financial Application with your username and new temporary password from the email. This will prompt you to change your password to something more meaningful.



8. Enter your old password in the **Old Password** field, which is the temporary password received in the email.
9. Enter a new password in the **New Password** field.
10. Enter your new password again in the **Confirm Password** field.

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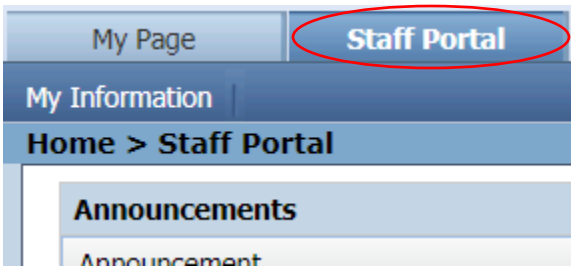
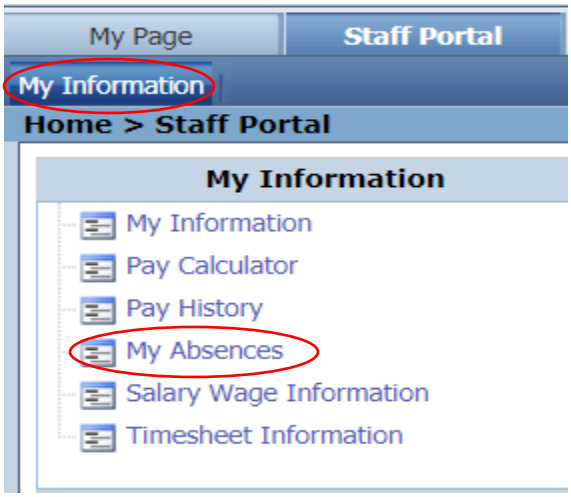
How to Request An Absence

To request an absence in the staff portal, perform the following:

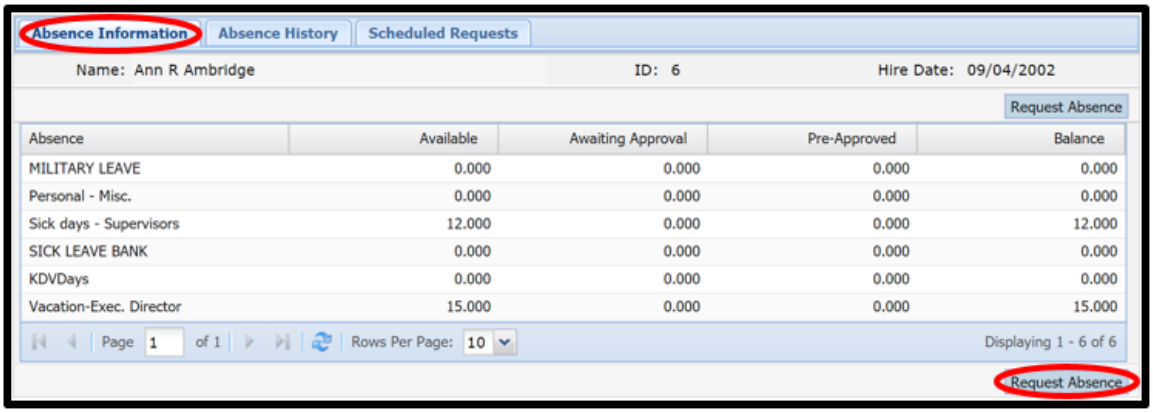
1. Log into the Staff Portal.
2. Click the **Staff Portal** tab.



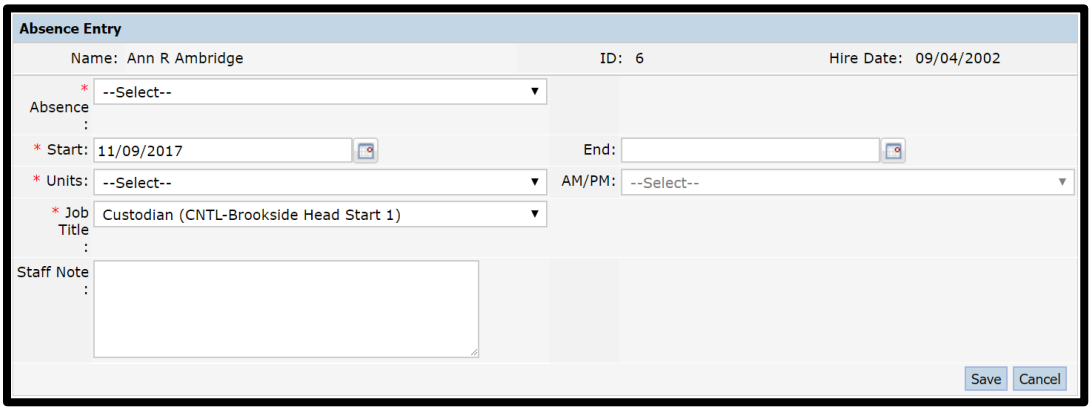
3. Click the **My Information** tab option.



4. Click the **My Absences** link on the menu to open the *Absence Information* screen.
5. The *Absence Information* tab displays all of the total information for your absences. Click on the **Request Absence** button available on the top or bottom of the absence information grid to open the *Absence Entry* screen.

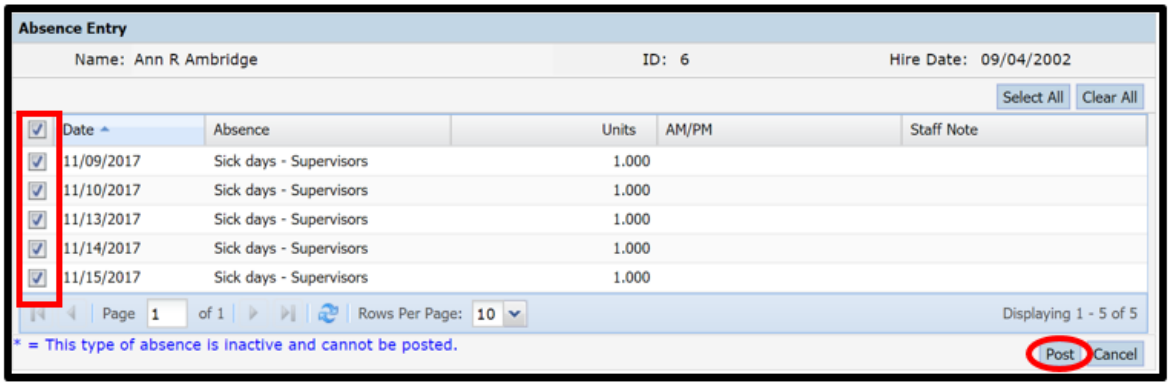


6. Select/Enter ALL required fields on the *Absence Entry* screen. **NOTE:** a red asterisk (*) means the field is required.



   a. Select the type of absences (sick, vacation) from the **Absence** field.
   b. Enter the **Start Date** (defaults to the current date). **NOTE:** If you are requesting a range of dates (such as a week of vacation), you MUST enter an end date in the **End Date** field.
   c. Select the unit value of the absence (full day=1, half day.5, or number of hours) from the **Unit** field. **NOTE:** If you select less than Full Day, you MUST select AM or PM from the AM/PM field.
   d. Select your job title from the **Job Title** field. If you only have one job title, this defaults to your current job title.
   e. Select your job location from the **Location** field. If you only have one job title, this defaults to your current job title's location.
   f. Optionally, add any staff or substitute notes in the applicable fields. **NOTE**: Sub notes are only available to those staff who need substitutes and are available to the sub caller.

7. Click the **Save** button.
   a. If you request one day, you will return to the main *Absence Information* tab and receive a blue message: '**Your Absence Request has been submitted**'.
   b. If you request a range of dates, you MUST use the checkbox options to select each of the dates from the grid and click the **Post** button to submit the request for approval. **NOTE**: you can select the checkbox to the left of the Date label to select ALL records.



NOTE: After you save or post, your absence request is sent to your supervisor for approval. You can also use the *Scheduled Requests* tab to cancel absence requests.

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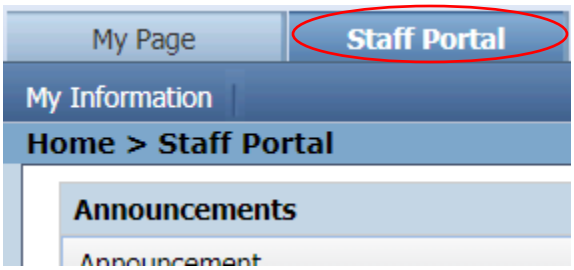
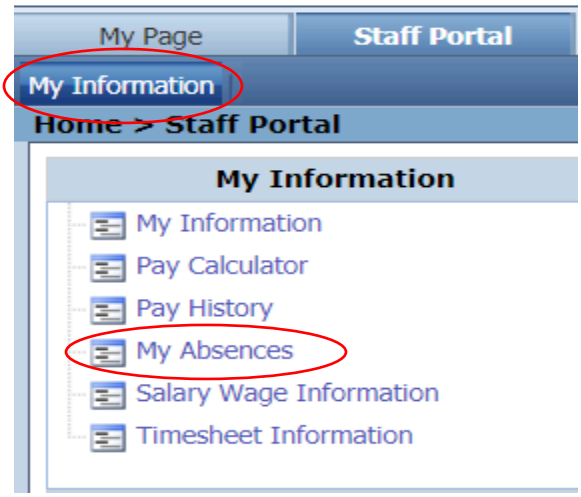
How to Cancel An Absence Request

To cancel an absence in the staff portal, perform the following:

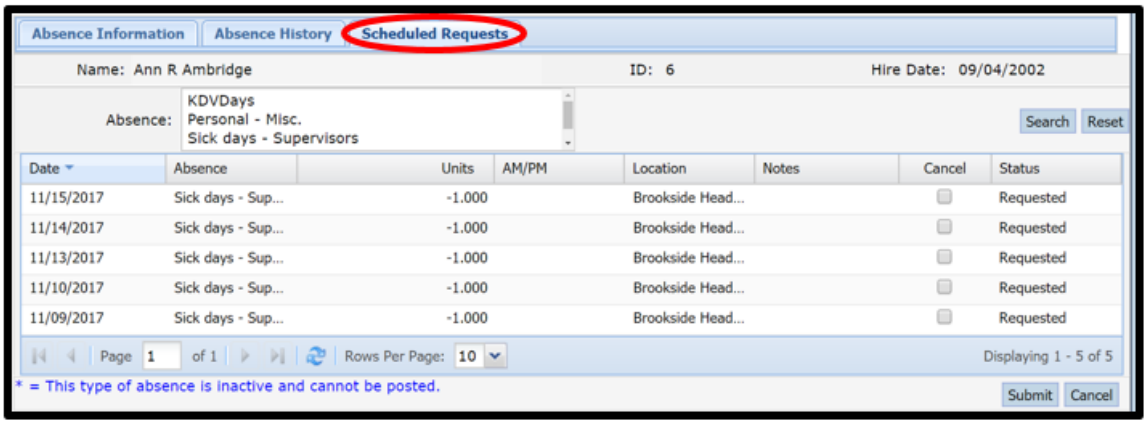
1. Log into the Staff Portal.
2. Click on the **Staff Portal** tab.



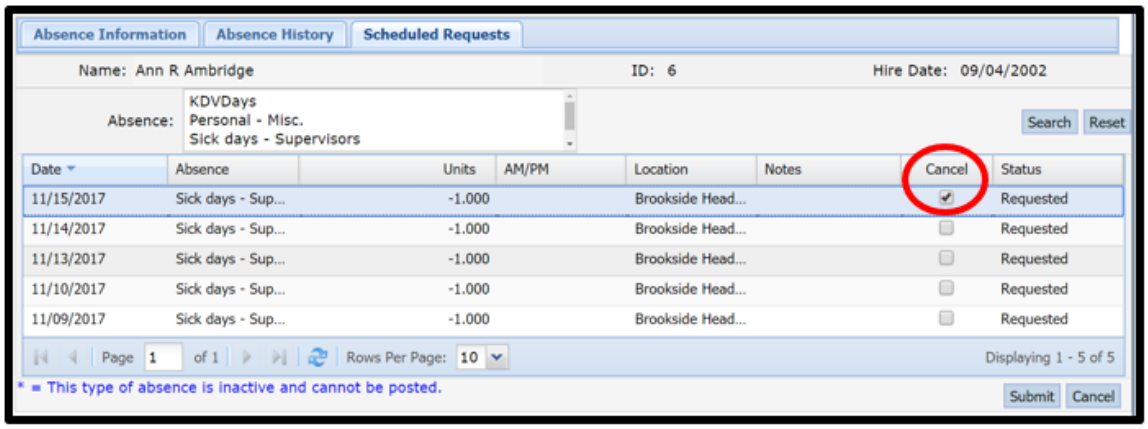
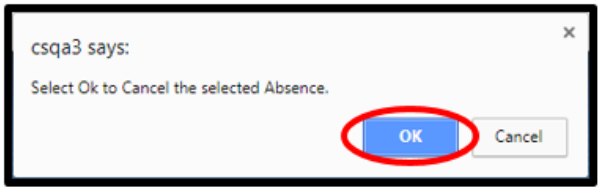
3. Click the **My Information** tab option.
4. Click the **My Absences** menu link to open the *Absence Information* tab.



5. Click the Scheduled Requests tab to view your future absence information in the grid.
    a. If desired, narrow your requests by absence types using the **Absence** field.
    b. Click the **Search** button.



6. Select the Cancel checkbox for one or multiple absence requests in the grid.



7. Click the Submit button to cancel your request.
8. Click OK after the system prompts you to confirm your cancelation request.