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INTRODUCTION TO EMPLOYEE DASHBOARD

The UNCGenie (Self Service Banner) Employee Dashboard provides employees access to elements of their Banner Employee records, some of which can be updated. In addition, the Employee Dashboard provides access to tools that allow designated employees to fulfill their job responsibilities such as EPAFs.

To login the Employee Dashboard visit https://ssb.uncg.edu, then click on “Login with iSpartan” and log in using your UNCG credentials:

From the landing page, click “Employees” then “Employee UNCGenie Main Manu” to go to the Employee Dashboard:
WELCOME TO UNCGENIE

ALL USERS

- Personal Information
  View and update your biographical and demographic information.
- Name Change Information
  Information on how to change your name.
- Social Security Number Change Information
  Information on how to change your SSN.
- Action Items
  View and process your assigned Action Items.
- Emergency Cell Phone Notification
  Enter your Cell Phone to contact in case of University Emergency.

EMPLOYEES

- Employee UNCGenie Main Menu
  Pay information, benefits, leave information, etc.
- EPAF (SSB 8)
  Changes person, position, or job actions or a combination.
- Salary Planner
  Evaluate, plan, and create budgets for any fiscal year.
- Effort Reporting
  US Federally mandated process to certify the salary charged is reasonable to the effort expended.
EMPLOYEE DASHBOARD – MAIN PAGE

From the Employee Dashboard main page, you will be able to view and access:

- My Profile
- Leave Balances
- Pay Information
- Earnings
- Benefits
- Taxes
- Job Summary
- Employee Summary
- EPAFs and PPAFs
- Effort Certification
- Pending Action Items
MY PROFILE

My Profile is a new page that displays a summary of basic employee information to the user including address, phone number, email address, emergency contact information and more. From here the user may also choose to update this information by clicking on the pencil icon.

LEAVE BALANCES

Leave Balances displays 6 current leave balances while “Full Leave Balance Information” provides detailed information on all current leave balances as well as complete leave history for the current and prior years.
PAY INFORMATION

Pay Information displays information related to an employee's current pay month. From here a user can open pages with additional information and tools including:

1. Their latest pay stub containing all earnings, deduction, tax, and direct deposit check information.
2. Complete pay stub history and details
3. Detailed direct deposit information
4. Complete deduction history

EARNINGS

Earnings displays total gross earnings for the current year as well as:

1. Detailed Earnings by Date Range
2. Detailed Earning by Position
BENEFITS

Benefits allows employees to view their current (and past) benefits by category. Current Summary will take the employee to a Date Selection page allowing them to view their current active deductions or those active as of a specific date.

Note that from here, employees can also choose to view current details on various categories of benefits including:

1. Retirement Plans
2. Health Benefits
3. Flexible Spending Accounts

The following options are not available to UNCG employees in UNCGenie:

4. Miscellaneous – Selecting this option will display a notification that it is not available.
5. Beneficiaries and Dependents – Employees may see information related to family members.

NOTE: Family members listed here DO NOT reflect designated beneficiaries or dependents. All beneficiaries and dependents are only officially recognized in the NC State Employee Benefits Platforms: BenefitFocus (for NC State Health Plan) and Empyrean (all other benefits). Please contact askbenefits@uncg.edu with any questions.
After selecting a specific category of benefits, employees can also view:

1. A full history of related benefits deduction information
2. A detailed listing of related contributions or deductions.

**NOTE:** Employees **CANNOT** use UNCGenie to modify their benefits or deductions. All changes to benefits and deductions must be managed in the NC State Employee Benefits Platforms: BenefitFocus (for NC State Health Plan) and Empyrean (all other benefits). Please contact askbenefits@uncg.edu with any questions.

**TAXES**

Taxes combines all available information and tools related to employee tax withholdings and forms including:

1. W-4 Employee's Withholding Allowance Certificate
2. Electronic Regulatory Consent
3. NC State Tax Form
4. W-2 Wage and Tax Statement
5. W-2c Corrected Wage and Tax Statement
JOB SUMMARY

Job Summary displays information related to current and prior jobs including relevant job dates, job change reasons, titles, departments, and statuses.
EMPLOYEE SUMMARY

Employee Summary is a new section displaying base employee information including hire dates, service dates, departments, employee classes and more. At UNCG the fields are defined as follows:

- Status – Employee status
- Full Time/Part Time Indicator – Whether an employee is designated as full or part time
- Home Department – The department an employee is employed by
- Check Distribution – The same as Home Dept.
- Employee Class – The employee’s employee classification, e.g. SHRA Exempt, EHRA 12 Month Leave Earning
- Current Hire Date – The data an employee was last hired (only changed after a break in service or certain classification changes)
- Original Hire Date – The date an employee was originally hired
- Adjusted Service – The date used to calculate consecutive years of State Service
- Seniority – The date used to calculate consecutive years of UNCG Service
- First Work Day – The first day of an employee’s assignment
- Hiring Location – Not used at UNCG
- Hiring College – Not used at UNCG
- Hiring Campus – Not used at UNCG
- District/Division – This represents a faculty member’s Department of Rank
### Employee Summary

<table>
<thead>
<tr>
<th>Status</th>
<th>Current Hire Date: 11/01/2023</th>
<th>Hiring Location:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Time Part Time Indicator</td>
<td>Original Hire Date: 08/10/1998</td>
<td>Hiring College:</td>
</tr>
<tr>
<td>Home Department: Office of the Provost</td>
<td>Adjusted Service: 11/01/1998</td>
<td>Hiring Campus:</td>
</tr>
<tr>
<td>Check Distribution: Human Resources</td>
<td>Seniority: 11/01/1999</td>
<td>District/Division:</td>
</tr>
<tr>
<td>Employee Class: SHRA Exempt</td>
<td>First Work Day:</td>
<td></td>
</tr>
</tbody>
</table>

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The My Activities section of the Employee Dashboard lists tools designated employees can use to perform their job duties and responsibilities as well as any pending Action Item notices such as survey requests, emergency contact review, and more.

EPAFs and PPAFs can be accessed using the “Electronic Personnel Action Forms (SSB8)” link. This link will take employees with access to managing EPAF/PPAFs to SSB8. Form there, employees with access can Originate, View, and Approve designated actions.

**Note:** EPAF/PPAFs in SSB8 retain their full functionality and appearance for the time being. EPAF/PPAFs will be upgraded to SSB9 during a future phase of the SSB9 project.

Clicking the EPAF (SSB8) link will take employees to the legacy UNCGenie page which will provide limited access to a few functions not yet migrated to UNCGenie 8. On this page, EPAF users may select:

1. **EPAFS** – Here employees will be able to perform all expected functions related to managing EPAF/PPAFs including Originating, Approving, Assigning Proxies, and more.
2. Employee Profile – This link will take employees back to the UNCGenie 9 Employee Dashboard.

**EFFORT CERTIFICATION**

Effort Certification provides functionality to allow authorized stakeholders to manage effort tracking related to grant funded personnel. This functionality is currently being configured and tested with plans to release to SSB9 soon.