



## **Employee Self Service Guide**

*HR Employee Service Line at (855) 678-5027 or [Benefits@HeicoCG.com](mailto:Benefits@HeicoCG.com)*

# Employee Self Service Guide

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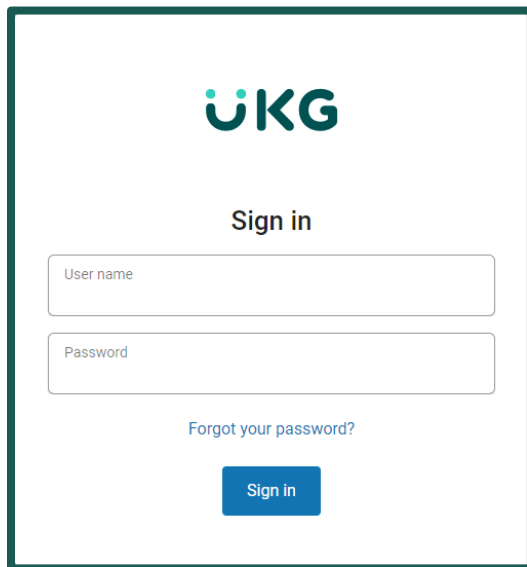
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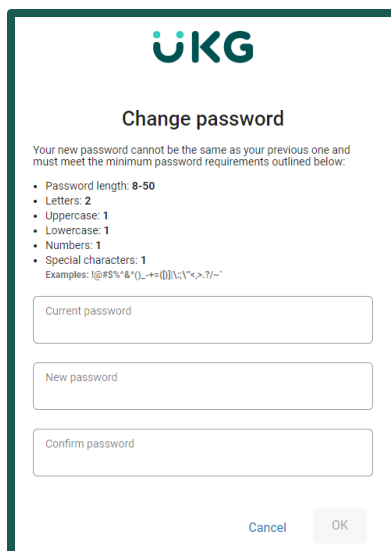
# Employee Self Service Guide

## LOG INTO UKG – For the First Time

1. Go to UKG: Link is located under Employee Login on your Company websites Home Page or visit [n31.ultipro.com](http://n31.ultipro.com).
2. Login using your default User Name and Password. Your default User Name is your **First Name** followed by your **Original Hire Date**, typed as MMDDYYYY. (Ex: Mary was hired on September 21, 2004. Her default User Name would be Mary09212004).
3. The default password is **First Name** followed by **Home ZIP Code**. (Ex: Mary's ZIP Code is 60555. Her default Password would be Mary60555). If you encounter problems, try using the zip code you lived in when you first were hired.

The image shows the UKG Sign in screen. At the top is the UKG logo. Below it is the text "Sign in". There are two input fields: "User name" and "Password". Below the "Password" field is a link that says "Forgot your password?". At the bottom is a blue button labeled "Sign in".

4. Click the **"Sign In"** button to continue.
5. The first time you log into UKG, you will be asked to Change your Password to something more secure. You can choose any password you like, as long as it follows the listed UKG password requirements.

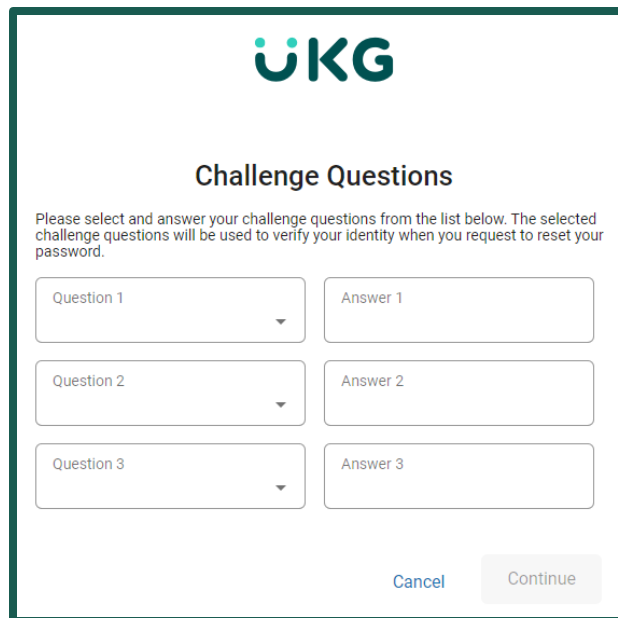
The image shows the UKG Change password screen. At the top is the UKG logo. Below it is the text "Change password". There is a note: "Your new password cannot be the same as your previous one and must meet the minimum password requirements outlined below:". Below the note are the requirements:

- Password length: 8-50
- Letters: 2
- Uppercase: 1
- Lowercase: 1
- Numbers: 1
- Special characters: 1

Below the requirements are three input fields: "Current password", "New password", and "Confirm password". At the bottom are two buttons: "Cancel" and "OK".

# Employee Self Service Guide

6. After setting up your password you will be asked to set up three *Challenge Questions* which you will need to answer if you ever forget your password. Remember that your answers are case sensitive. Click *“Continue”* when you are done to be taken to your new Home Page (Smart Dashboard).



The screenshot shows the UKG logo at the top. Below it is the title "Challenge Questions". A paragraph of instructions follows: "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." There are three rows of input fields. Each row has a dropdown menu on the left labeled "Question 1", "Question 2", and "Question 3" respectively, and a text input field on the right labeled "Answer 1", "Answer 2", and "Answer 3" respectively. At the bottom right, there are two buttons: "Cancel" and "Continue".

**UKG**

### 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.

Question 1	Answer 1
Question 2	Answer 2
Question 3	Answer 3

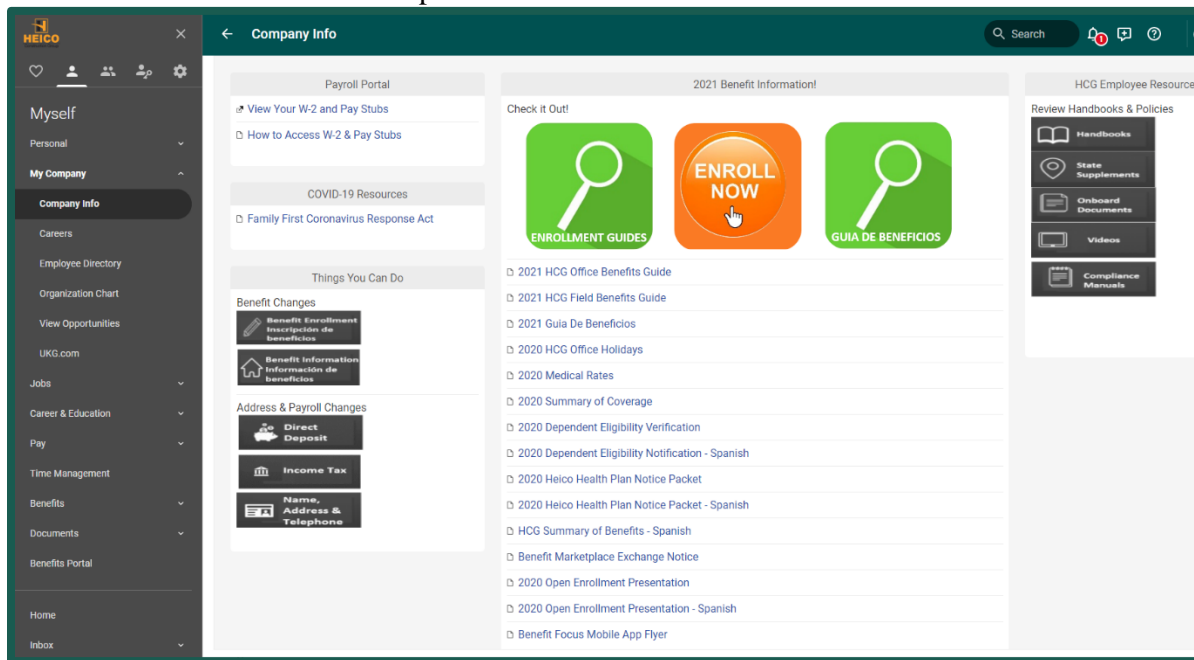
[Cancel](#) [Continue](#)

# Employee Self Service Guide

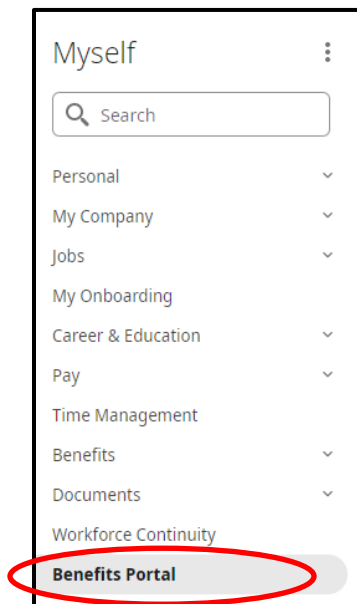
## OVERVIEW – Company Info Page

Upon logging in to UKG, you will gain access to Pertinent Company documents.

- ✓ Employee Handbooks
- ✓ Benefit Information
- ✓ Safety and HR Employee Videos
- ✓ Personal Tax & Direct Deposit Information



## BENEFITS PORTAL

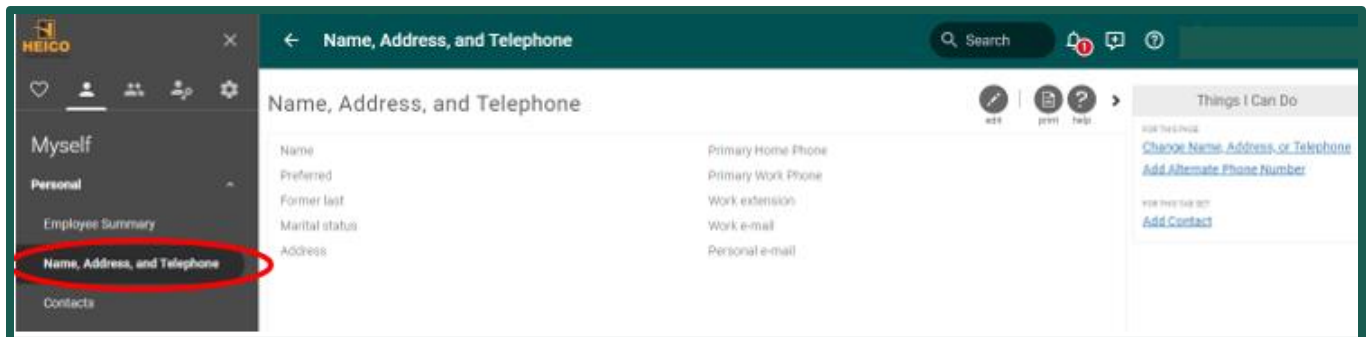


- Access your benefits by navigating to the Myself tab and clicking Benefits Portal.

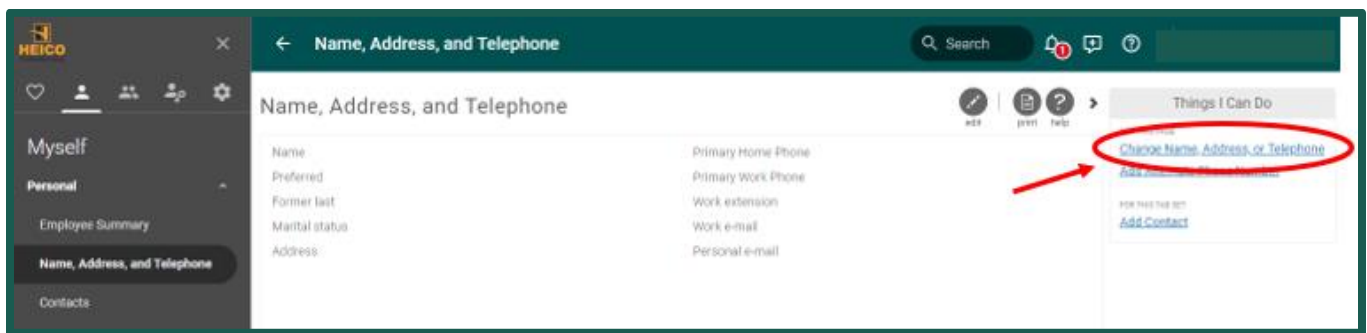
# Employee Self Service Guide

## MYSELF Tab - Changing Your Address and/or Telephone

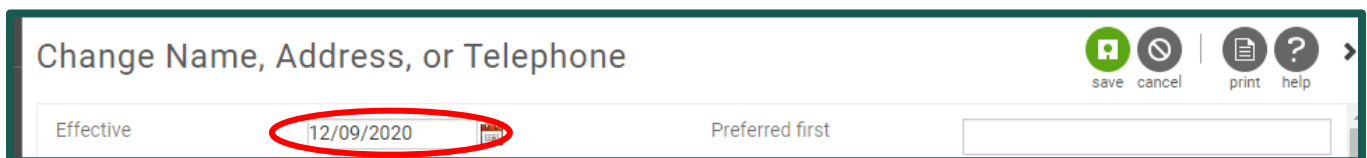
1. On the **PERSONAL** tab, click “Name, Address, and Telephone Contacts”.



2. Select ‘*Change Name, Address or Telephone*’ from the Things I Can Do menu on the right of your screen.



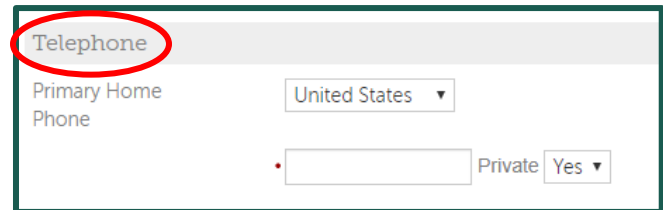
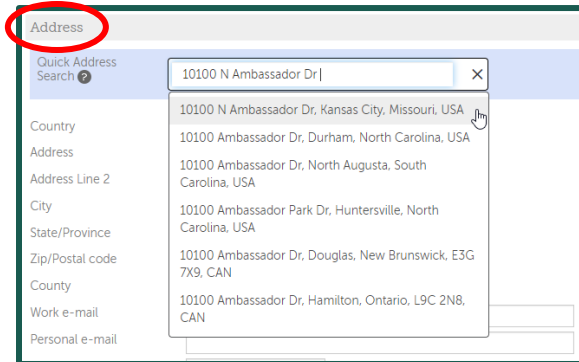
3. Effective date defaults to the date information is being updated, modify if necessary.



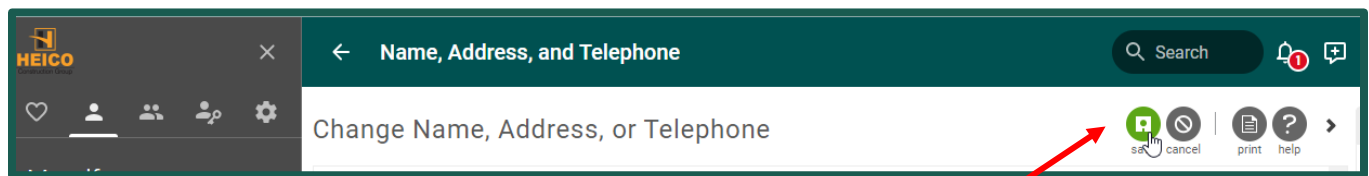
## Changing Your Address and/or Telephone – Continued

# Employee Self Service Guide

4. Update the Address, type in the Quick Address Search bar and select the correct one. Telephone can be added to the section below. Name changes **MUST** be processed through HR with legal documentation provided.



5. Click **Save**.



## PERSONAL Tab – Adding Emergency Contact Information

1. On the **PERSONAL** tab, select '**Add Contact**' from the Things I Can Do menu on the right of your screen.

# Employee Self Service Guide

HEICO

Name, Address, and Telephone

Search

edit print help

Things I Can Do

FOR THIS PAGE

[Change Name, Address, or Telephone](#)

[Add Alternate Phone Number](#)

[Add Contact](#)

Name, Address, and Telephone

Name	Primary Home Phone
Preferred	Primary Work Phone
Former last	Work extension
Marital status	Work e-mail
Address	Personal e-mail

2. Enter the first and last name of the Emergency Contact.

Add/Change Contact

delete save reset cancel print help

☒ Contact is active

Personal

First • Martha

Middle

Last • Interface

3. Scroll down to the 'Designation' section and select the appropriate *Relationship* from the picklist provided.

Designation

Select at least one designation for this contact. **Note:** Identifying this record as a **Dependent** or **Beneficiary** only makes them eligible for consideration, it does not automatically add them to any benefit plans.

Relationship •

None

Brother

Child living at home

Child not living at home

Cousin

Father

Fiance

Mother

Other

Sister

Spouse

Step-child

Step-father

Step-mother

Trust

Designation

☐ Dependent

☐ Beneficiary

☐ Emergency contact

Address

☐ Address is different

Country

Address

Address 2

## Adding Emergency Contact Information - Continued

4. Select *Emergency contact* as the contact *Designation*.



# Employee Self Service Guide

Add/Change Contact

delete

save

reset

cancel

print

help

Designation

Select at least one designation for this contact. **Note:** Identifying this record as a **Dependent** or **Beneficiary** only makes them eligible for consideration, it does not automatically add them to any benefit plans.

Relationship

Spouse

Designation

☐ Dependent

☐ Beneficiary

☒ Emergency contact

5. Click **Save**.

Add/Change Contact

delete

save

reset

cancel

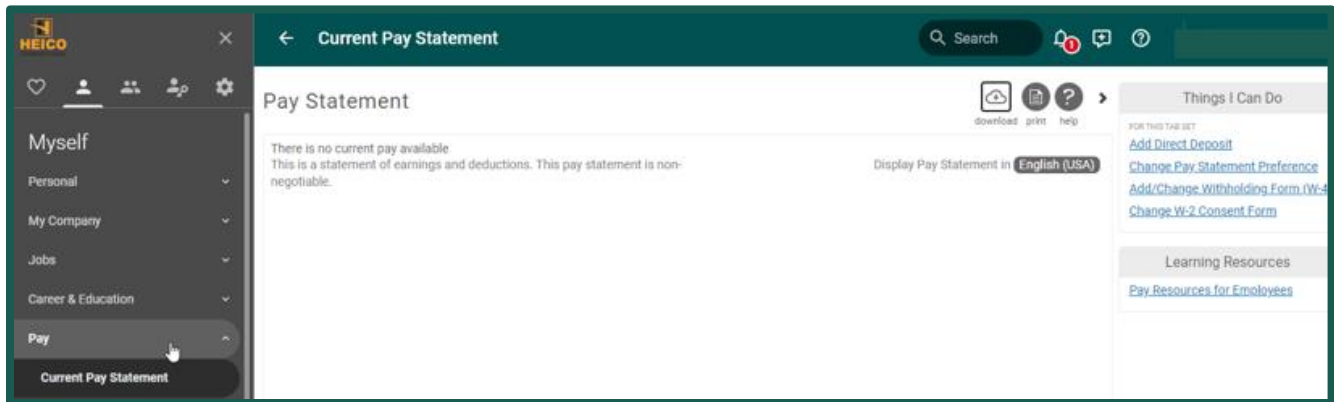
print

help

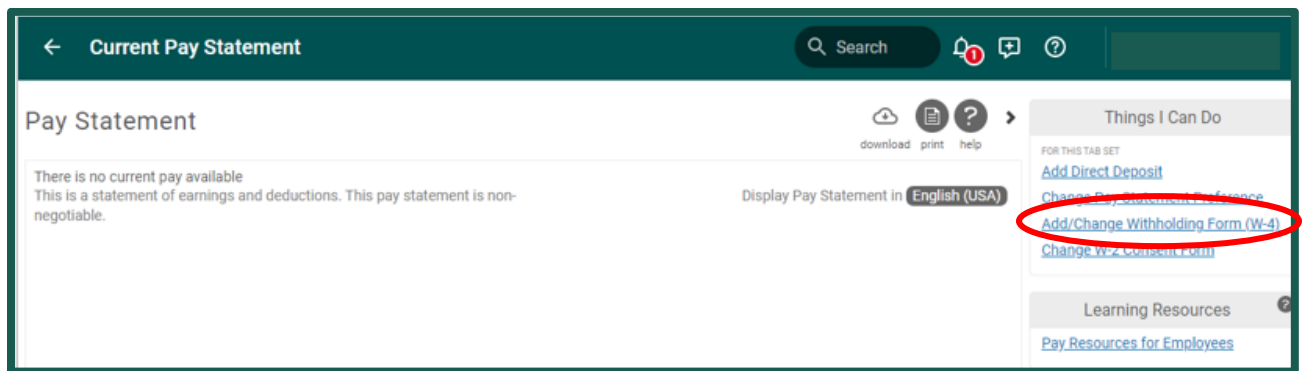
## **PAY** Tab – Changing Your Withholdings & Direct Deposit

Click on the **PAY** tab to access your tax and information.

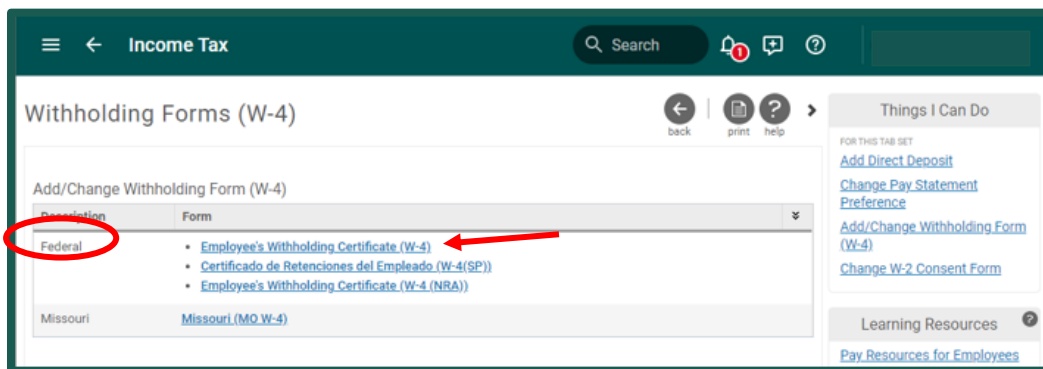
# Employee Self Service Guide



1. To modify your withholdings, select ‘**Add/Change W-4 Withholding**’ from the Things I Can Do menu on the right of your screen.



2. To update the **FEDERAL** withholding information, select “**Employees Withholding Allowance Certificate (W-4)**”.



## Changing Your Withholdings & Direct Deposit – Continued

3. Complete W-4 and click “**Next**”.

# Employee Self Service Guide

**Federal Tax Form W-4**

**\* Are your paychecks subject to Federal income tax?**  
You can only select No if both of the following are true:  
- Last year no Federal taxes were withheld from my paycheck  
- This year no Federal taxes should be withheld from my paycheck

☒ Yes  
☐ No

**\* Step 1: Personal Information - Filing Status**

☒ Single or Married filing separately  
☐ Married filing jointly (or Qualifying widow(er))  
☐ Head of household (Select only if you're unmarried and pay more than half the cost of keeping up your home)

**\* Step 2: Do you hold more than one job at a time?**

☒ Yes  
☐ No

☐ If there are only two jobs total, you may check this box. Do the other job's employer withhold taxes for you. For other options or more information on Step 2, see [Full Instructions](#).

**For the most accurate withholding, you should complete Steps**

**Step 3: Claim Dependents**  
Is your income \$200,000 or less?

☒ Yes  
☐ No

4. After reviewing your State W-4, check 'Under penalties of perjury, I certify that the information provided on this is true and accurate' and click **"Sign & Save"**.

**Federal Tax Form W-4**

☒ Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete.

**Sign & Save**

Page: 1 of 4 Automatic Zoom

Form **W-4**  
Department of the Treasury  
Internal Revenue Service

**Employee's Withholding Certificate**

► Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.  
► Give Form W-4 to your employer.  
► Your withholding is subject to review by the IRS.

OMB No. 1545-0074  
**2020**

## Changing Your Withholdings & Direct Deposit – Continued

1. To modify your **STATE** taxes, select *'Applicable State Form'*.

# Employee Self Service Guide

Income Tax

Withholding Forms (W-4)

Add/Change Withholding Form (W-4)

Description	Form
Federal	<ul style="list-style-type: none"><li>Employee's Withholding Certificate (W-4)</li><li>Certificado de Retenciones del Empleado (W-4(SP))</li><li>Employee's Withholding Certificate (W-4 (NRA))</li></ul>
Missouri	Missouri (MO W-4)

Things I Can Do

FOR THIS TAB SET

- [Add Direct Deposit](#)
- [Change Pay Statement Preference](#)
- [Add/Change Withholding Form \(W-4\)](#)
- [Change W-2 Consent Form](#)

Learning Resources

- [Pay Resources for Employees](#)

2. Complete State form and select **“Next”**.

Withholding - Missouri

Missouri Tax Form MO W-4

Full Instructions

**Filing Status** MO W-4 Line 1

☐ Single or Married Spouse Works or Married Filing Separate

☐ Married (Spouse does not work)

☐ Head of Household

**Additional Withholding** MO W-4 Line 2

Additional amount to be withheld each pay period.

\$

**Reduced Withholding** MO W-4 Line 3

Amount to be withheld each pay period. Please note: As an alternative to the standard income tax calculation, opting into Missouri's reduced withholding allows for a personally calculated flat amount to be deducted each paycheck. (See Full Instructions for further explanation.)

\$

**Exemption from Taxes** MO W-4 Line 4

☐ I certify that I am exempt from Missouri withholding because:

☐ I had a right to a refund of all of my Missouri income tax withheld last year because I had no tax liability and this year I expect a refund of all Missouri income tax withheld because I expect to have no tax liability.

☐ I meet the conditions set forth under the Servicemember Civil Relief Act, as amended by the Military Spouses Residency Relief Act and have no Missouri tax liability.

☐ Income earned as a member of any active duty component of the Armed Forces of the United States is eligible for the military income deduction.

next cancel help

3. After reviewing your State W-4, check ‘Under penalties of perjury, I certify that the information provided on this is true and accurate’ and click **“Sign & Save”**.

Withholding - Missouri

Missouri Tax Form MO W-4

☒ Under penalties of perjury, I certify that the information provided on this form is true and accurate.

**Sign & Save**

Page: 1 of 1

Automatic Zoom

Form MO W-4

Missouri Department of Revenue

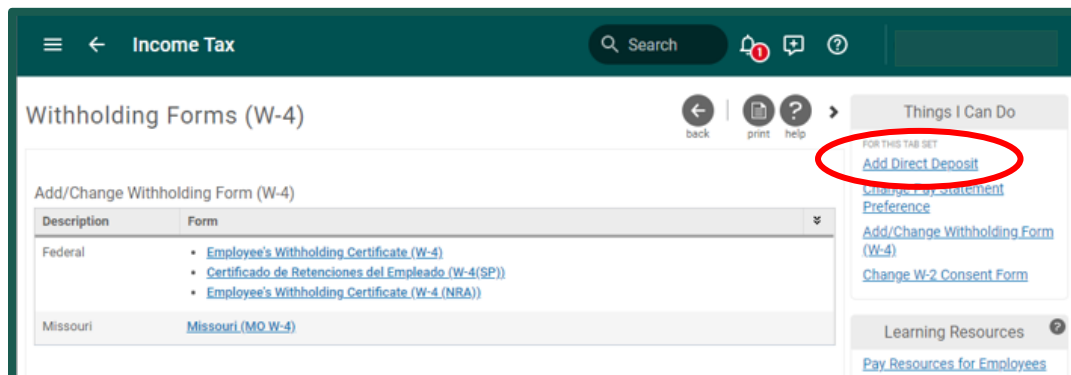
**Employee's Withholding Certificate**

This certificate is for income tax withholding and child support enforcement purposes only. Type or print.

## Changing Your Withholdings & Direct Deposit – Continued

# Employee Self Service Guide

1. To modify your **DIRECT DEPOSIT**, select '**Add Direct Deposit**' from the *Things I Can Do* menu on the right of your screen.



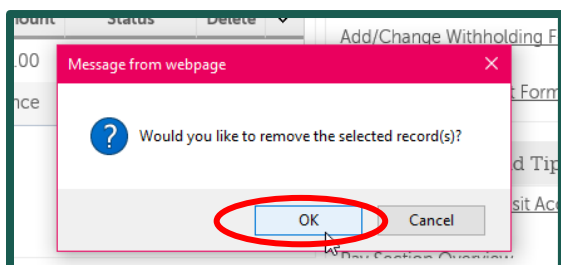
2. You cannot “edit” a current direct deposit. You must add new banking information and delete the previous direct deposit data. Fill out the details prompted after selecting the “Add Direct Deposit” link.

A screenshot of the 'Direct Deposit Detail' form. It has a header with 'Direct Deposit Detail' and icons for delete, save, reset, cancel, print, and help. The form includes a 'Description' field with a placeholder 'e.g., "My College Fund"', a 'Bank name' field, a 'Routing number' field, an 'Account number' field, and an 'Account type' dropdown. There's a 'Status' dropdown set to 'Active' and a section for 'Amount' with radio buttons for 'Flat Amount', 'Percent amount', and 'Available balance'. The 'Flat Amount' option is selected.

3. To delete the previous information, check the box listed under delete and click “delete” above.

A screenshot of the 'Direct Deposit Summary' page. It has a header with 'Direct Deposit Summary' and icons for add, delete, print, and help. Below the header, there's a section for 'Pay Statement Preference' with a link for 'Paper and electronic copies'. The main part of the page is a table with the following columns: Account Number, Description, Bank, Account Type, Amount, Status, and Delete. There are two rows of data. The first row has Account Number 'xxxxxxxxxxxxxxxx5689', Description 'Savings', Amount '\$200.00', Status 'Prenote', and a checked 'Delete' checkbox. The second row has Account Number 'xxxxxxxxxxxxxxxx3456', Description 'Checking', Amount 'Available balance', Status 'Prenote', and a checked 'Delete' checkbox.

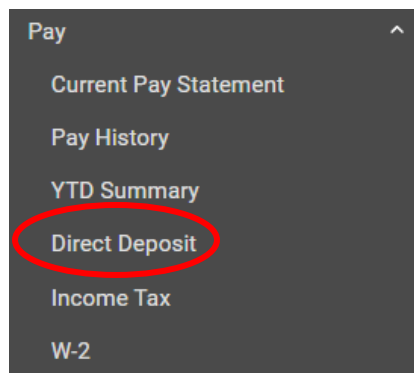
4. Then click “ok” to confirm changes and “submit” to finish.

A screenshot of the 'Summary' page. It has a header with 'Summary' and icons for submit, cancel, print, and help. Below the header, there's a red error message that says 'You must select Submit to complete this request.' The 'submit' button is circled in red.

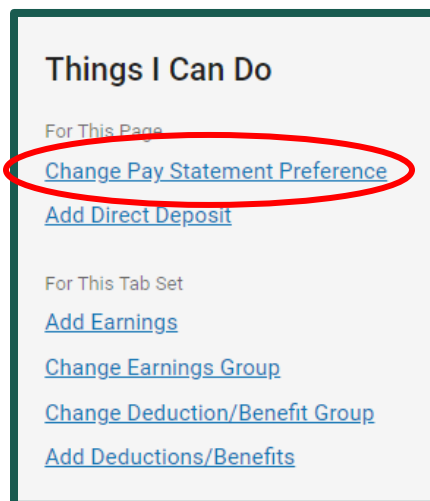
# Employee Self Service Guide

## Changing your Pay Statement Preference

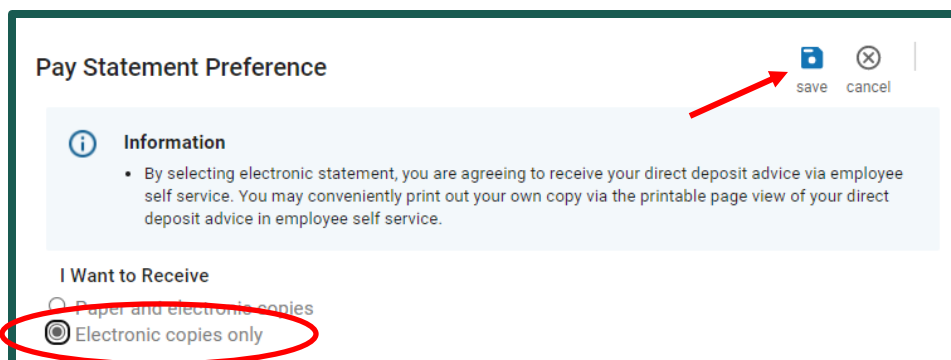
Click on the **PAY** tab and select '*Direct Deposit*'



1. To modify your **PAY STATEMENT PREFERENCES**, select '*Change Pay Statement Preference*' from the Things I Can Do menu on the right of your screen.



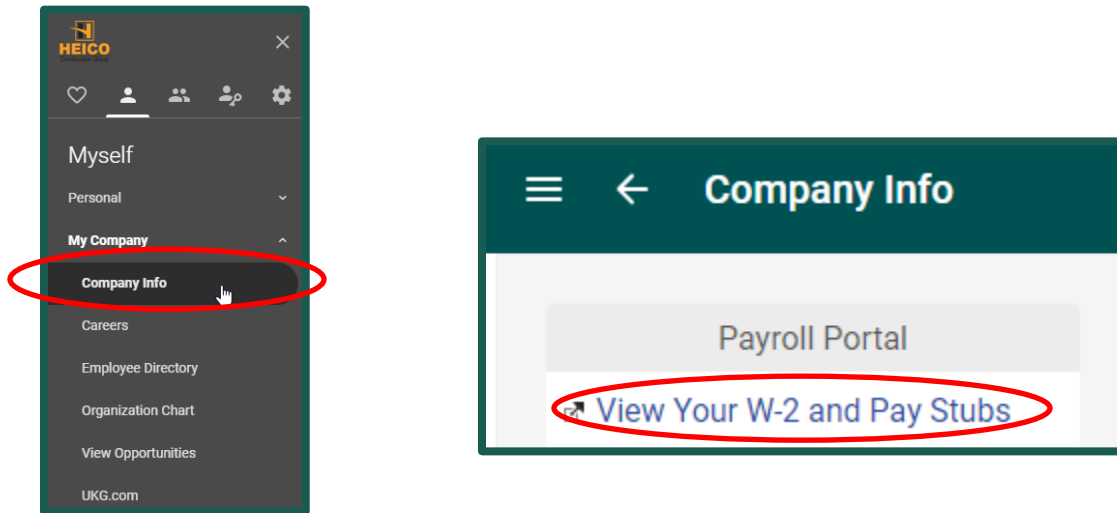
2. Select 'Electronic copies only' and click 'Save'

A screenshot of the 'Pay Statement Preference' form. The form has a title 'Pay Statement Preference' at the top. Below the title is an 'Information' section with a blue icon and text: 'By selecting electronic statement, you are agreeing to receive your direct deposit advice via employee self service. You may conveniently print out your own copy via the printable page view of your direct deposit advice in employee self service.' Below the information section is a section titled 'I Want to Receive' with two radio button options: 'Paper and electronic copies' and 'Electronic copies only' (which is circled in red). At the top right of the form, there are 'save' and 'cancel' buttons, with a red arrow pointing to the 'save' button.

# Employee Self Service Guide

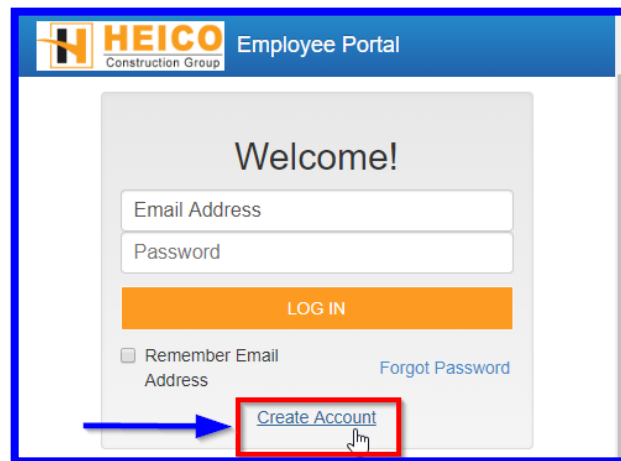
## Employee Payroll Portal Access

Click on the **MY COMPANY** tab and select '*My Company Info*' then '*View Your W-2 and Pay Stubs*'



## Create an Account:

1. Click “Create Account” at the bottom of the “Welcome!” box.
2. An “Account Setup” Pop-up window will appear where the employee will enter the requested information.



# Employee Self Service Guide

## Account Setup:

1. Fill out all fields marked *Required*.
2. Please note the following:
  - ‘Employee ID’ is the employee’s unique company employee number. The Employee ID number can be found in the uppermost left corner of a company pay stub. **Enter the last 6 digits of the employee ID only (without the 400).**
  - ‘Tax ID’ is the employee’s Social Security Number. **Enter the last 4 digits only.**
  - ‘Email Address’ should be a **personal email account**.
3. After all fields are completed, click the “Create Account” button at the very bottom of the “Account Setup” window



Account Setup

Employee ID:

Employee ID is the employee's unique Company Employee number. This number can be found in the uppermost left corner of any pay stub.

Required

Last Name:

Required

Date of Birth:

mm/dd/yyyy

Required

Tax ID:

Tax ID is the employee's Social Security Number.

Enter the last 4 digits of your Tax ID.

Email Address:

Email Address should be employee's personal email address.

This email address is used to log into the Employee Self-Service Portal

Required

Confirm Email Address:

Password:

Password Must:

- ✗ Contain at least one lower case letter
- ✗ Contain at least one upper case letter
- ✗ Contain at least one non-alpha character
- ✗ Be at least 8 characters in length

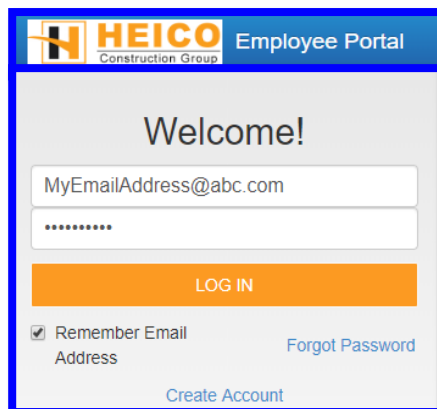
Confirm Password:

Required



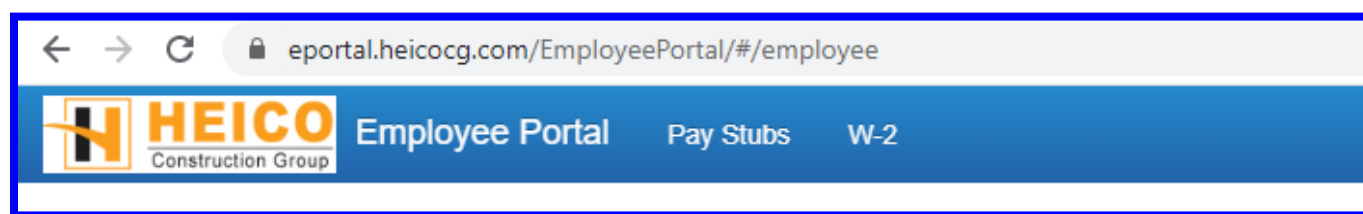
# Employee Self Service Guide

4. Employee can now “LOG IN” using from the employee Payroll Portal “Welcome!” box. Enter Email Address and Password.



The screenshot shows the HEICO Employee Portal login interface. At the top, there is a blue header with the HEICO logo and the text "Employee Portal". Below the header, a "Welcome!" message is displayed. Underneath, there are two input fields: one for the email address (containing "MyEmailAddress@abc.com") and one for the password (masked with dots). An orange "LOG IN" button is positioned below the password field. At the bottom, there is a checkbox labeled "Remember Email Address" which is checked, and a link for "Forgot Password". A "Create Account" link is also visible at the bottom.

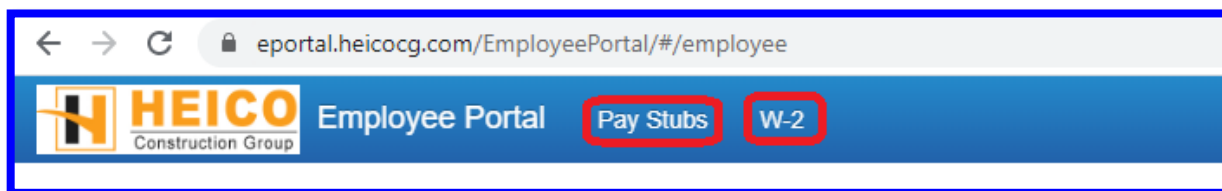
**Employee Payroll Portal:** After a successful LOG IN, the employee will be taken directly to the employee payroll portal site.



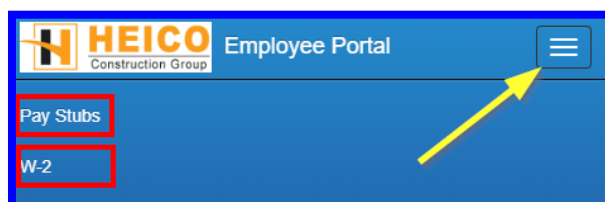
## Pay Stubs or W-2

Accessing employee **Pay Stubs** and **W-2**'s can be performed from the Employee Payroll Portal site.

- From the Employee Payroll Portal site, “Pay Stubs” and “W-2” can be Viewed, Printed or Downloaded.
  - Select “Pay Stubs” or “W-2” if using a web browser on a computer or laptop.



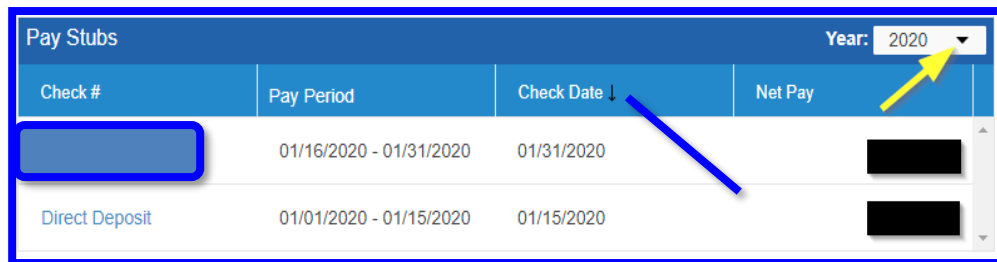
- On a mobile device, select the three bars in the upper right corner to see “Pay Stubs” and “W-2”.



# Employee Self Service Guide

## Pay Stubs

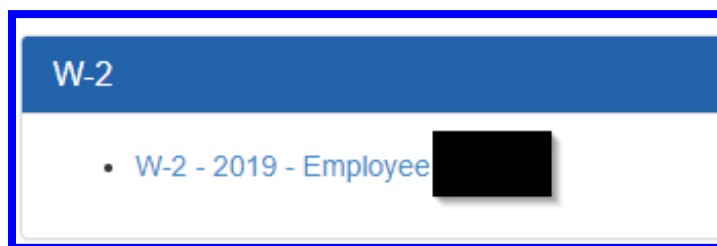
- Employee *Pay Stubs for the last five (5) years (2016-2020) can be accessed from the site.*
- Select the desired year from the drop down box.
- Pay stubs are sorted by the “Check Date” column. By default, the most recent pay stub will appear at the top. Clicking anywhere in the area of the “Check Date” box will toggle the sorting between ascending and descending dates.
- Select “Direct Deposit” to view a particular pay stub.



Pay Stubs				Year: 2020
Check #	Pay Period	Check Date ↓	Net Pay	
	01/16/2020 - 01/31/2020	01/31/2020		
Direct Deposit	01/01/2020 - 01/15/2020	01/15/2020		

## W-2

- Current Year (2019) W-2's are accessible via the site.



*Note: If the W-2 does not appear after selecting 'W-2 link', turn off the the pop-up blocker on the device.  
On an iphone using Safari, go to Settings/Safari/Block Pop-ups.*