UKG

Employee Self Service Guide

HR Employee Service Line at (855) 678-5027 or Benefits@HeicoCG.com

Employee Self Service Guide

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Company Info Page

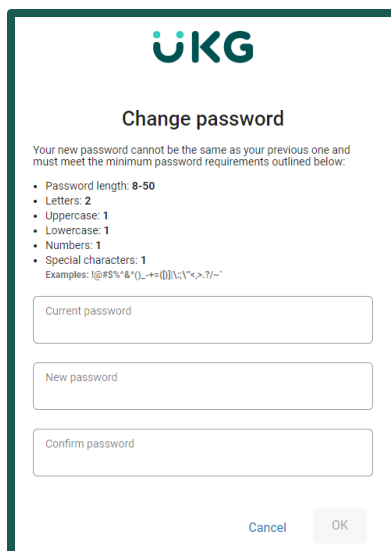**Personal Tab**

Pay Tab
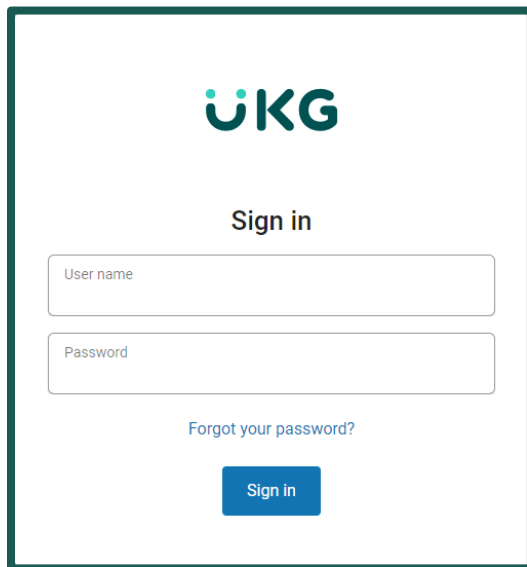
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LOG INTO UKG – For the First Time

1. Go to UKG: Link is located under Employee Login on your Company websites Home Page or visit n31.ultipro.com.

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.

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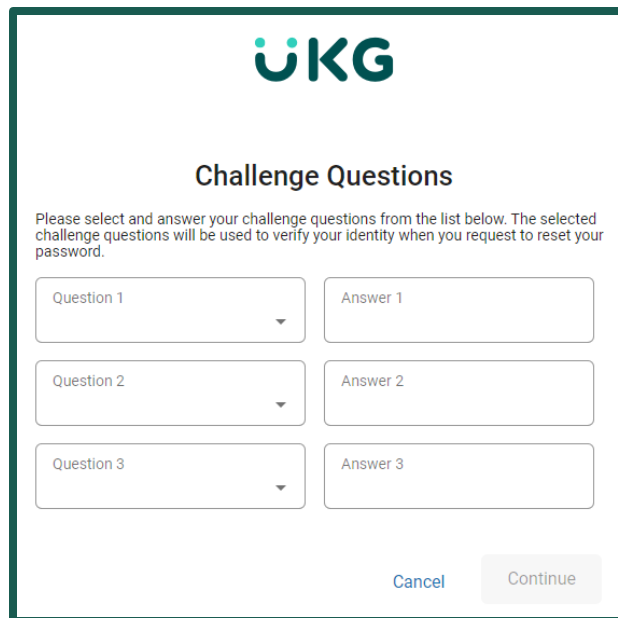
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6. After setting up your password you will be asked to set up three *Challenge Questions* which you will need to answer if you ever forget your password. Remember that your answers are case sensitive. Click *"Continue"* when you are done to be taken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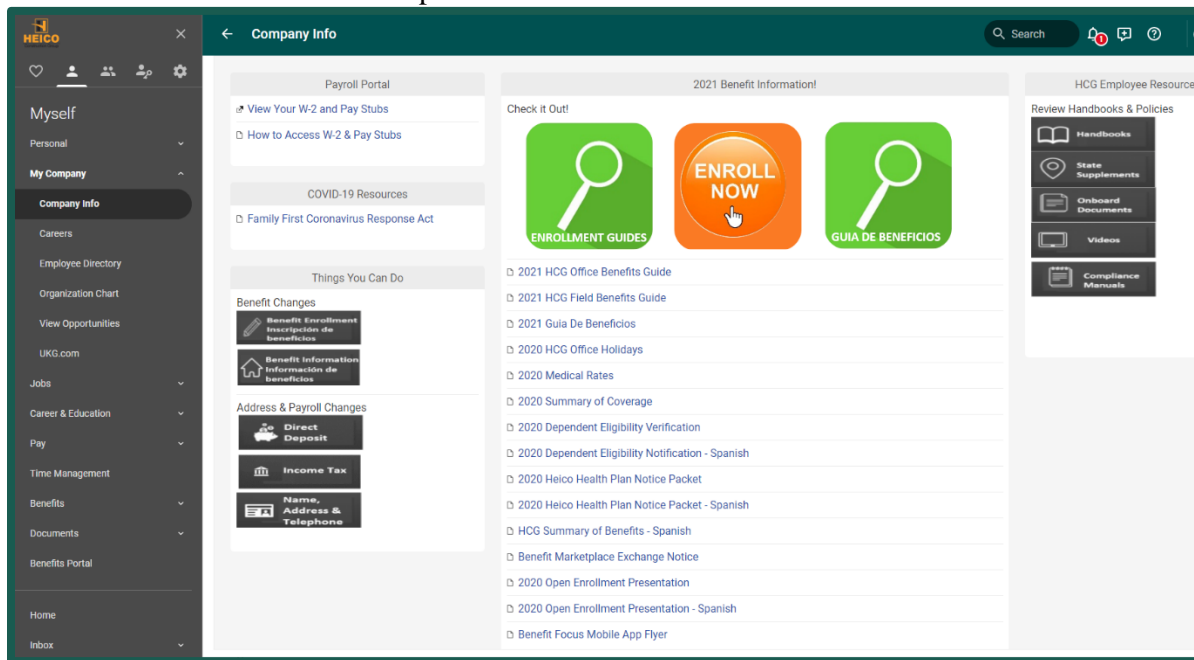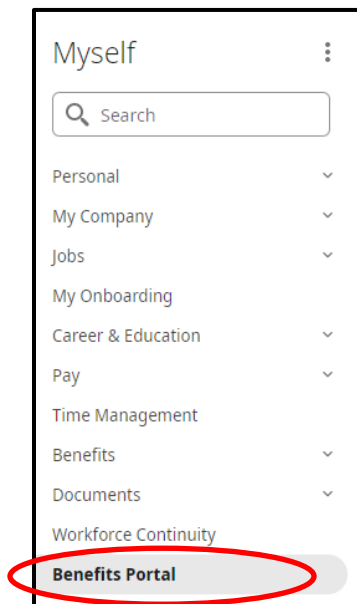
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OVERVIEW – Company Info Page

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

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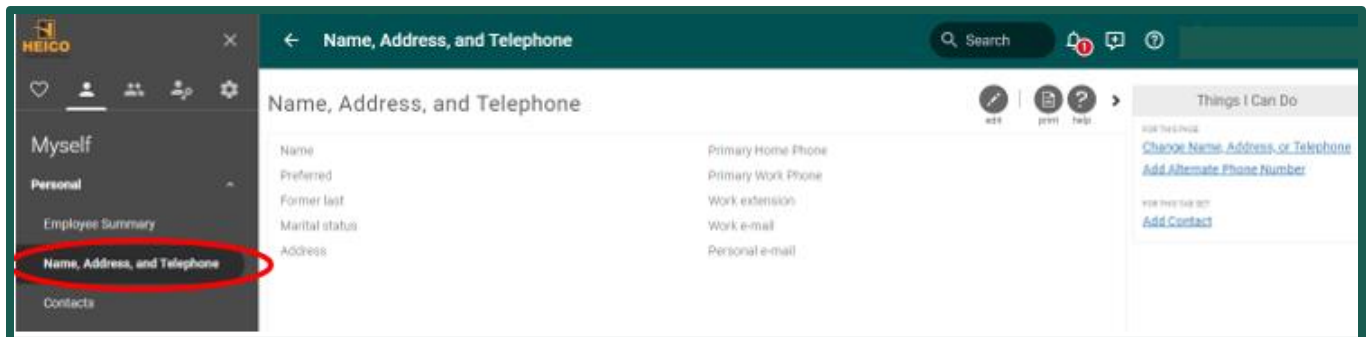- ✓ Personal Tax & Direct Deposit Information

BENEFITS PORTAL

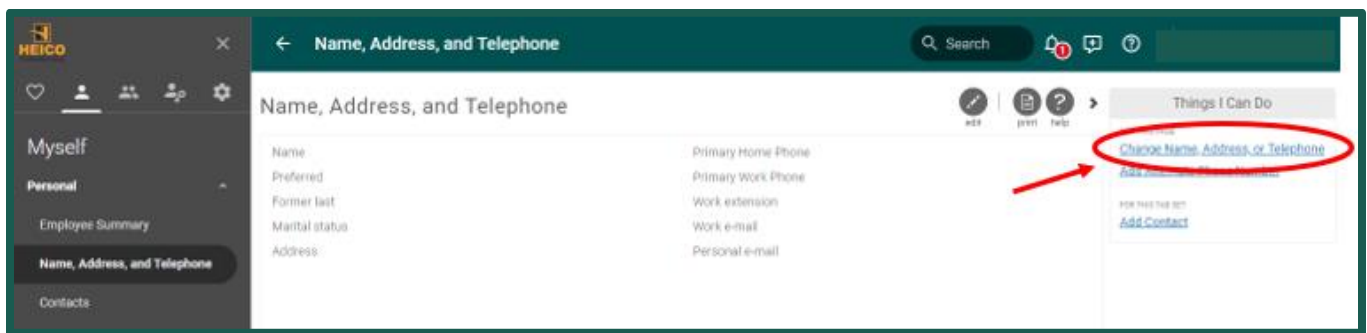➢ Access your benefits by navigating to the Myself tab and clicking Benefits Portal.

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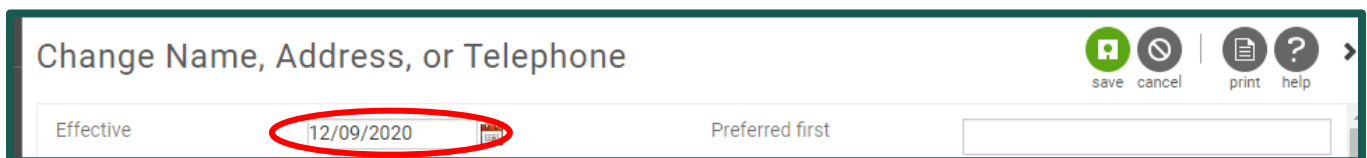## MYSELF Tab - Changing Your Address and/or Telephone

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.
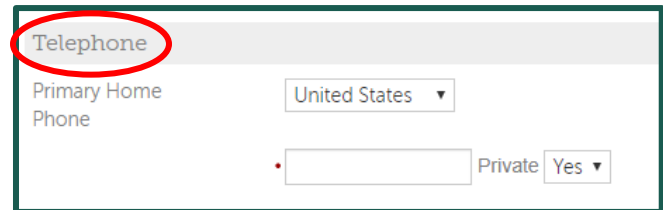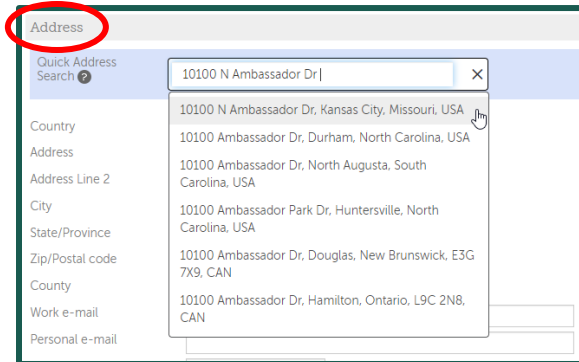

3. Effective date defaults to the date information is being updated, modify if necessary.
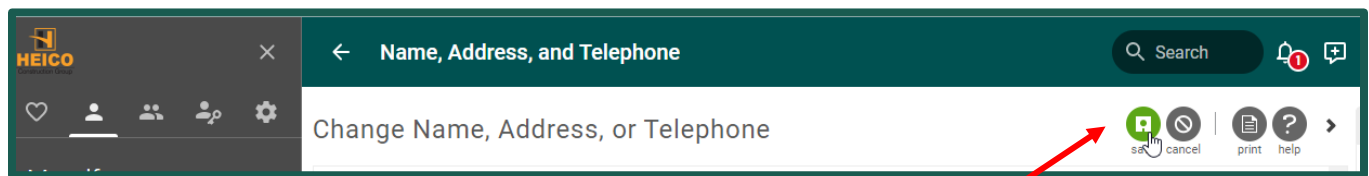

Changing Your Address and/or Telephone – Continued

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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.

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

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

Adding Emergency Contact Information - Continued

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

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5. Click *Save*.
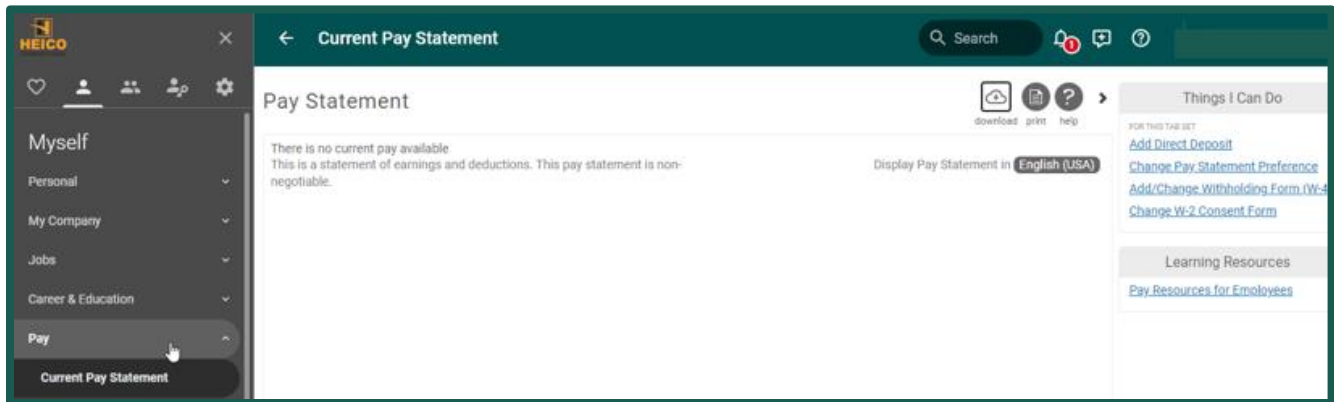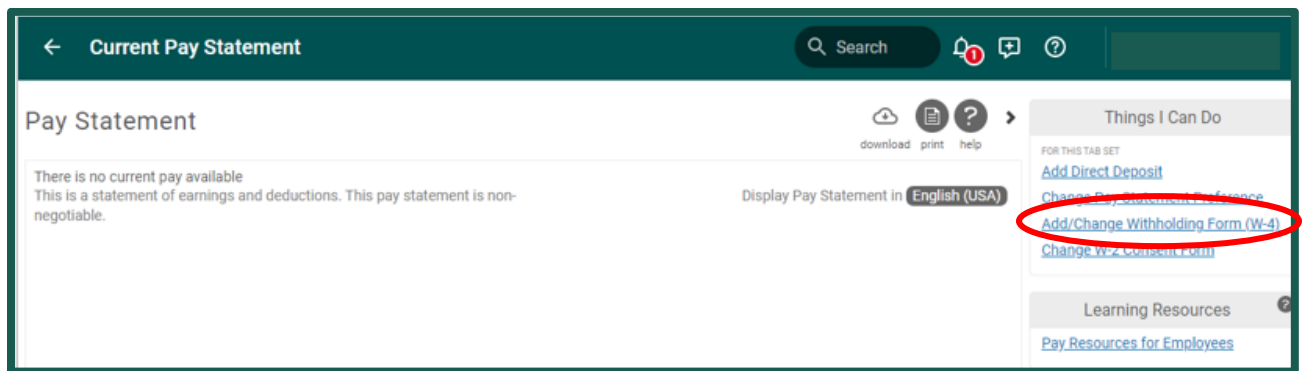

PAY Tab – Changing Your Withholdings & Direct Deposit

Click on the PAY tab to access your tax and information.
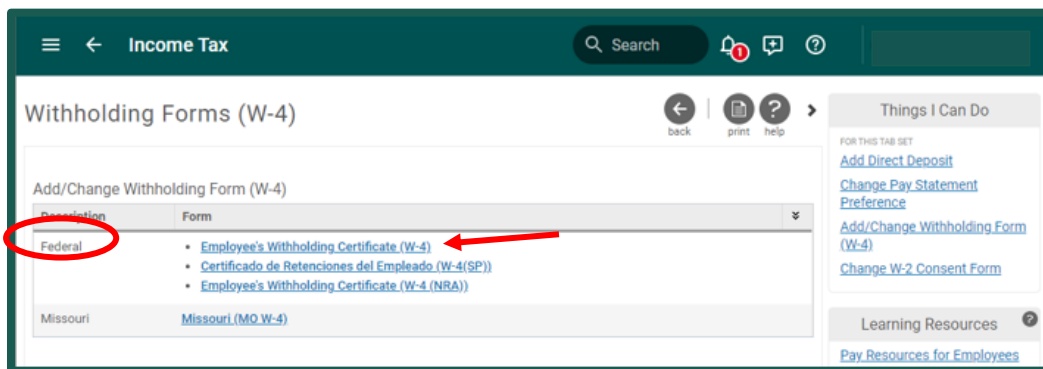
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1. To modify your withholdings, select **'Add/***Change W-4 Withholding'** from the *Things I Can Do* menu on the right of your screen.

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"*.

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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"_**.

Changing Your Withholdings & Direct Deposit – Continued

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

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2. Complete State form and select *"Next"*.

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"*.

Changing Your Withholdings & Direct Deposit – Continued

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1. To modify your DIRECT DEPOSIT, select '***Add Direct Deposit'*** from the *Things I Can Do* menu on the right of your screen.
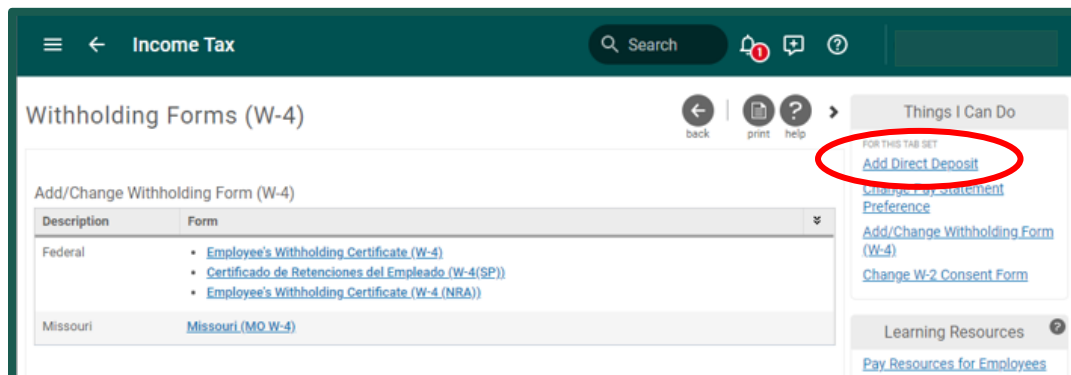
2. You cannot "edit" a current direct deposit. You must add new banking information and delete the previous direct deposit data. Fill out the details prompted after selecting the "Add Direct Deposit" link.
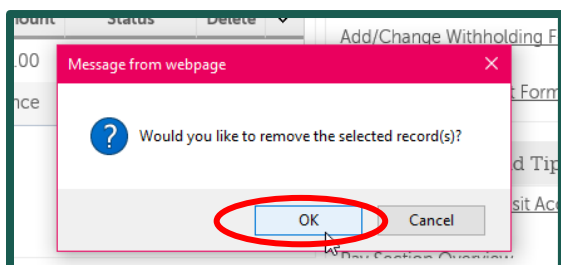

3. To delete the previous information, check the box listed under delete and click **"delete"** above.

4. Then click **"ok"** to confirm changes and **"submit"** to finish.

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Changing your Pay Statement Preference

Click on the PAY tab and select '***Direct Deposit***'
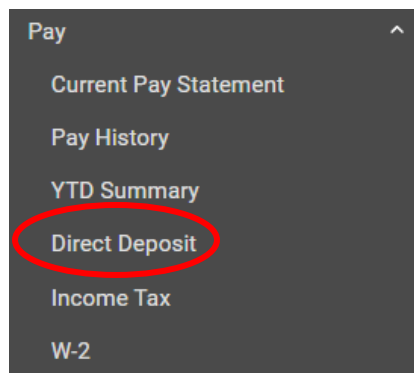
1. To modify your PAY STATEMENT PREFERENCES, select **'*Change Pay Statement Preference*'** from the _Things I Can Do_ menu on the right of your screen.

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

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Employee Payroll Portal Access

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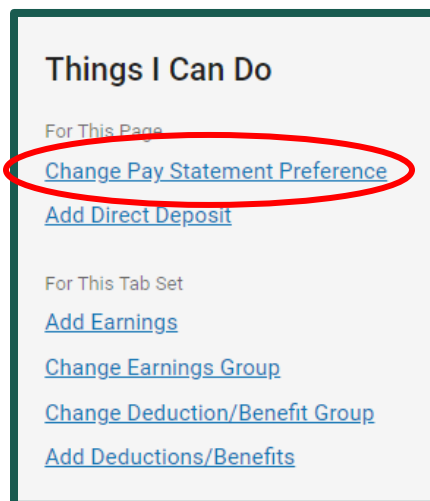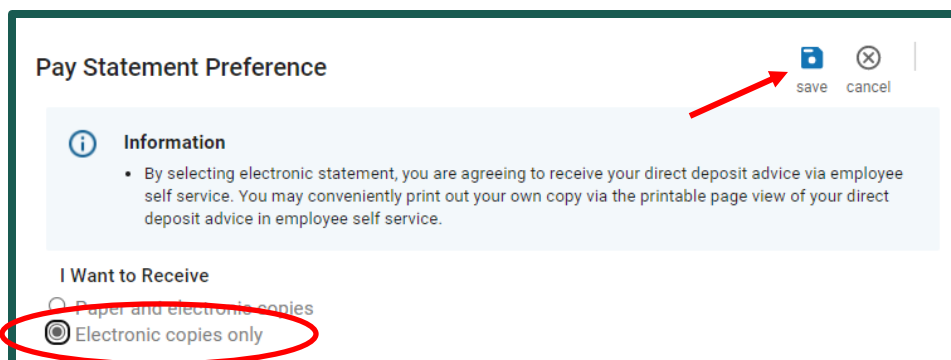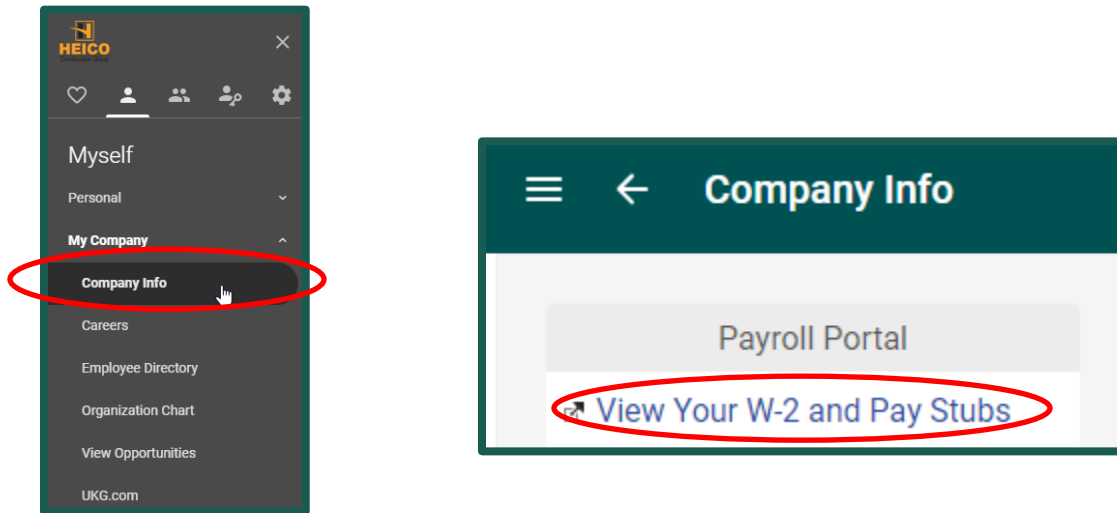

Create an Account:

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.

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Account Setup:

1. Fill out all fields marked *Required.*

2. Please note the following:
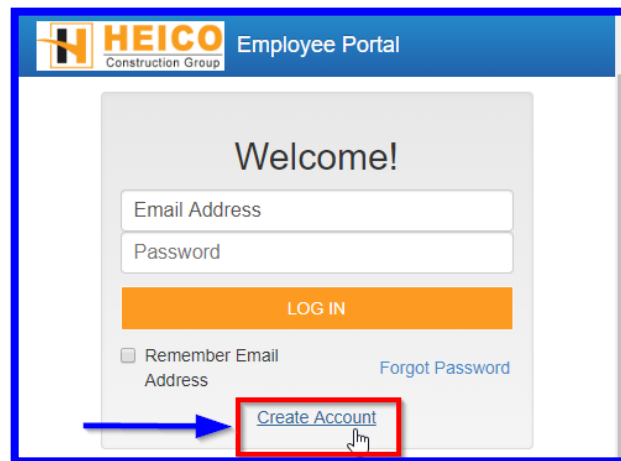   -   *'Employee ID'* is the employee's unique company employee number. The Employee ID number can be found in the uppermost left corner of a company pay stub. ***Enter the last 6 digits of the employee ID only (without the 400).***

    -   *'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
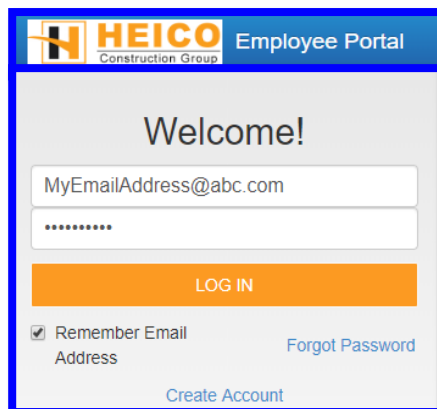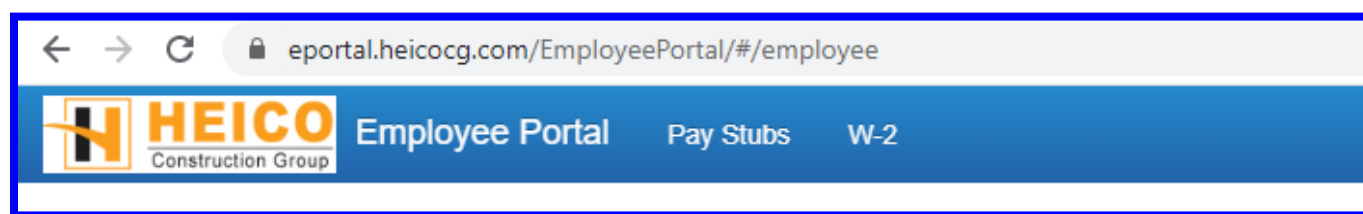
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4. Employee can now "LOG IN" using from the employee Payroll Portal "Welcome!" box. Enter Email Address and Password.

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.
    - o Select "Pay Stubs" or " W-2" if using a web browser on a computer or laptop.
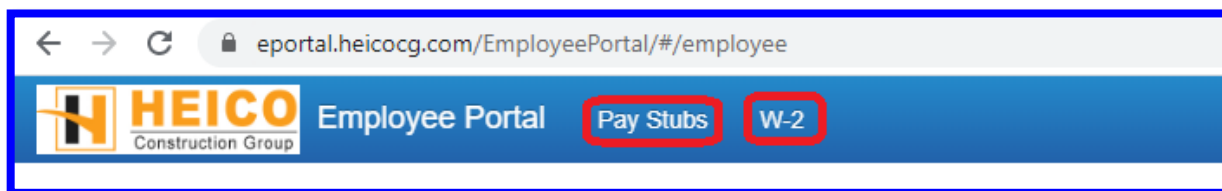
- On a mobile device, select the three bars in the upper right corner to see "Pay Stubs" and "W-2".

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Pay Stubs

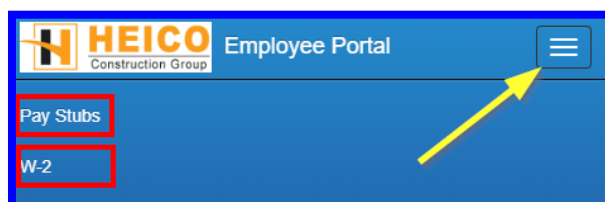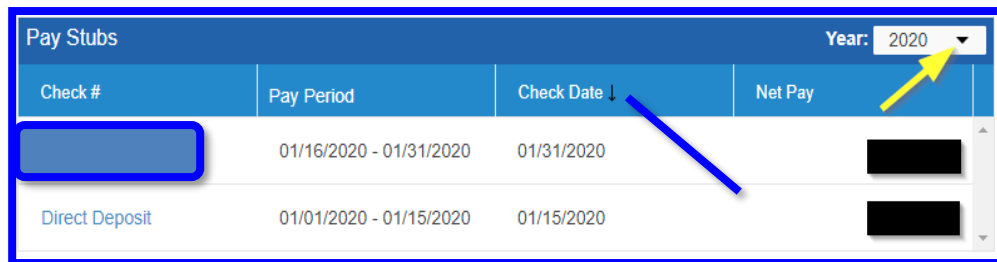- Employee *Pay Stubs for the last five (5) years (2016-2020) can be accessed from the site.*
- Select the desired year from the drop down box.
- Pay stubs are sorted by the "Check Date" column. By default, the most recent pay stub will appear at the top. Clickling anywhere in the area of the "Check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

W-2

- Current Year (2019) W-2's are accessible via the site.
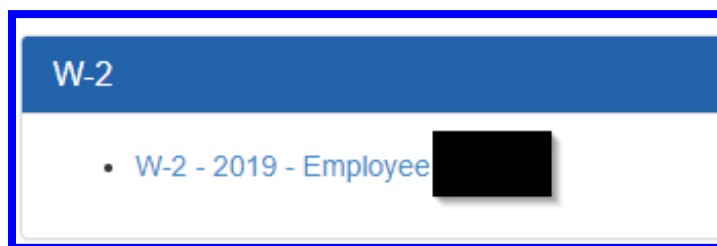
Note: If the W-2 does not appear after selecting 'W-2 link', turn off the the pop-up blocker on the device.
On an iphone using Safari, go to Settings/Safari/Block Pop-ups.