



## Connect Employee Quick Reference

### Introduction:

XCELHR is pleased to collaborate with your company to provide your HR needs. Our online portal [Connect](#) is available to provide you with 24x7 access to your payroll and employee information. This document will provide you with the instructions on how to access and navigate within the portal. If you have technology questions please send an email to [connectinquiries@xcelhr.com](mailto:connectinquiries@xcelhr.com).

### New User Sign On:

The following instructions will walk you through the process of creating your Connect login and access your personal information. Before you begin, you will need to know the following two (2) pieces of information about yourself:

- a. Last name
- b. Social security number

Create your “New User Sign On” account (NOTE: **Chrome** is the preferred browser)

1. In your browser, access <https://employee.xcelhr.com> and the following page will be displayed:

A screenshot of the XcelHR login page. It features the XcelHR logo at the top left. Below the logo are two input fields: 'Username' and 'Password'. To the right of the 'Password' field is a 'Log In' button. Below the 'Log In' button are two links: 'Forgot Username?' and 'Forgot Password?'. There is also a 'Register' link next to the 'Log In' button.

2. Click Register, and the following page will be displayed

A screenshot of the 'New User Registration' page. It has a title 'New User Registration' at the top. Below the title are five required fields, each with an asterisk: '\* Last Name', '\* Social Security Number (EIN Also Accepted)', '\* Username', '\* Password', and '\* Confirm Password'. At the bottom of the form are two buttons: 'Register' and 'Return To Login'.

3. Enter the required information and create your User Name and Password. Click Register when done. You can now return to the main login page and enter your newly created credentials.



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### Logging In:

1. Navigate to URL: <https://employee.xcelhr.com>
2. Enter the USERNAME and PASSWORD created in the previous step. Once successfully entered, you will be logged into Connect and your DASHBOARD window page will be displayed.

A screenshot of the XcelHR login page. It features the XcelHR logo at the top left. Below the logo are two input fields: 'Username' and 'Password'. The 'Username' field has a light blue border and a cursor. Below the 'Password' field is a 'Log In' button with a blue background and white text, and a 'Register' link in blue text. At the bottom, there are two links: 'Forgot Username?' and 'Forgot Password?'.

### Forgot Password:

1. Click on Hyperlink on the log in screen “Forgot Password”.
2. A window will appear asking you to enter your Username
3. Enter Username > Click Submit
4. An email will be sent to employee with instructions on how to reset password.

A screenshot of the 'Forgot Password' form. It has a title 'Forgot your password?' and a subtitle 'Enter your username and we will send you instructions for resetting your password.' Below this is a 'Username' input field. At the bottom, there is a 'Submit' button with a blue background and white text, and a 'Return To Login' link in blue text.



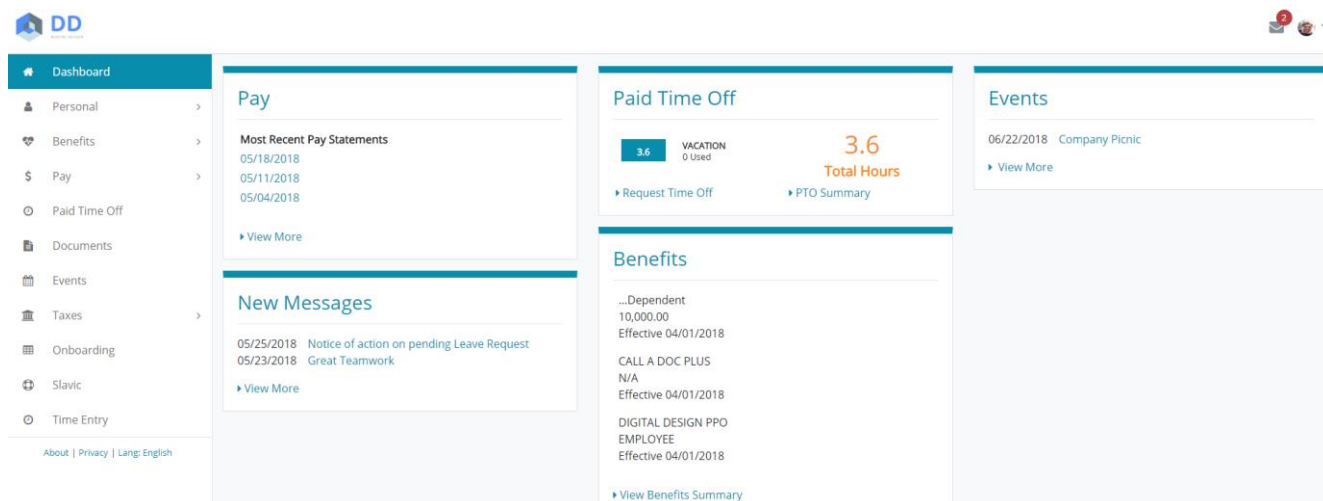
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### Dashboard/Employee Welcome Page

The dashboard is designed to give employees quick access to common HR and payroll information.

The standard menu items are listed on the left hand side of the page:

**Dashboard, Personal, Benefits, Pay, Paid Time Off, Documents, Events, Taxes, Onboarding, Slavic, Time Entry**

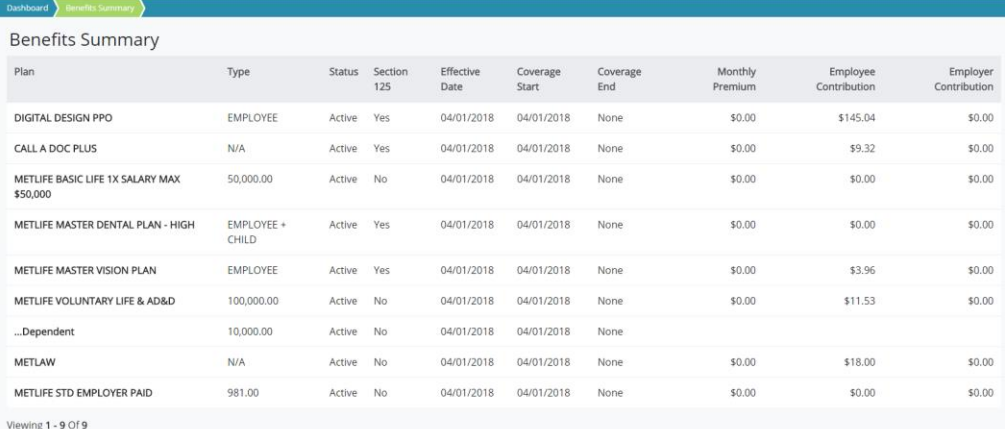
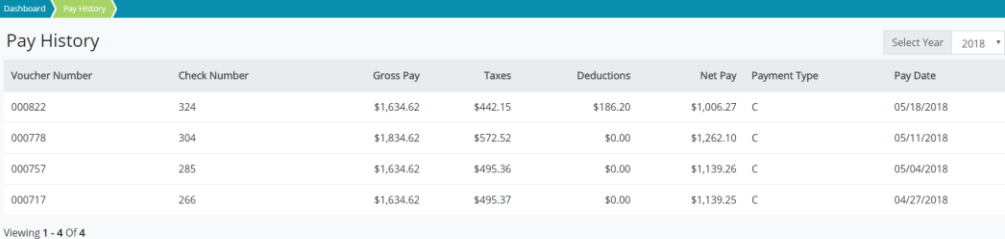
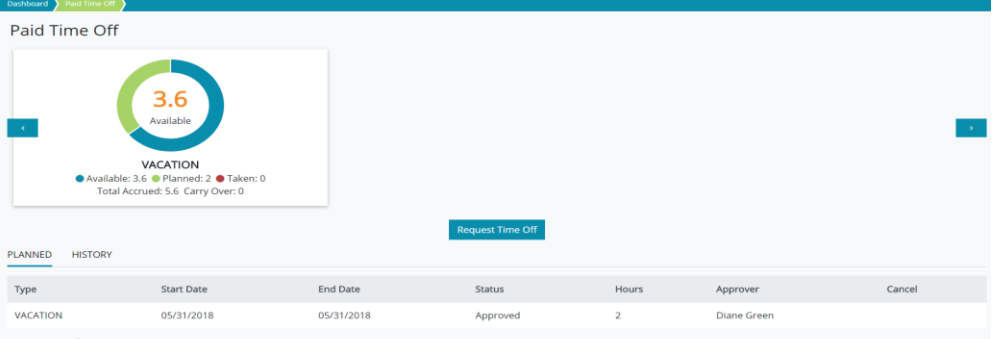


### Standard Employee Dashboard Items

<p><b>Personal</b></p> <p>Employment Summary</p> <p>Personal Info</p> <p>Contact Info</p> <p>Address</p> <p>Emergency Contacts</p> <p>Veteran Status</p> <p>Driver's License</p> <p>Vehicles</p> <p>Vehicle Insurance Policies</p> <p>Click on each category to view contents and make edits if enabled.</p>	<p>Personal menu is used to view and update employee personal and employment information. (See appendix "Common HR and Payroll Tasks" for navigation path on how to make changes to specific fields (i.e. address updates)</p> <p><i>1-Employment Summary</i></p>
<p><b>Benefits</b></p>	<p>Benefit menu provides details on Benefit plan offerings and selections. You can View Benefits Summary, Flexible Spending, Retirement Summary information and make updates to dependents and beneficiaries. During onboarding Clicking on "Benefits</p>



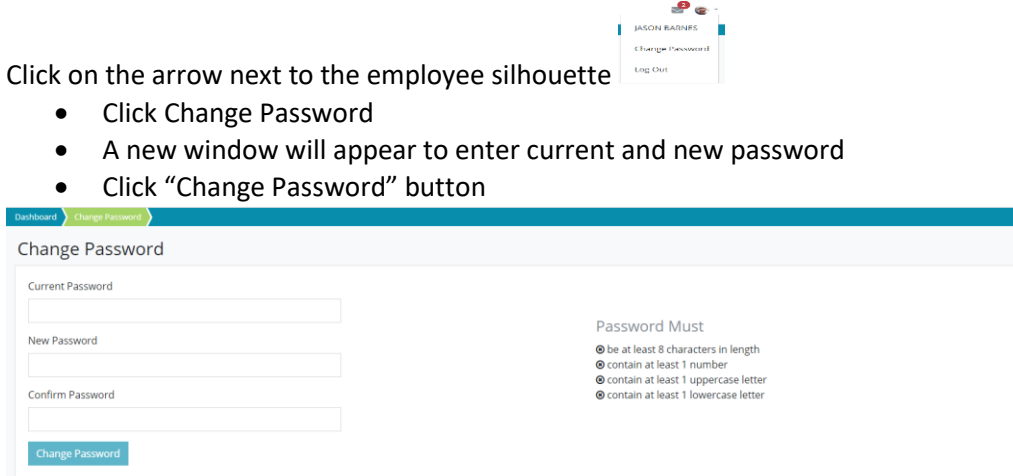
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<p><b>Benefits</b></p> <ul style="list-style-type: none"> <li>Summary</li> <li>Flexible Spending</li> <li>Retirement Summary</li> <li>Dependents/Beneficiaries</li> <li>Benefits Enrollment</li> <li>Benefits Summary</li> <li>Benefit Confirmation</li> </ul> <p>Click on each category to view contents and make edits if enabled.</p>	<p>Enrollment” will launch the employee into the Benefits Enrollment wizard to make elections.</p> <p><i>2-Benefits Summary</i></p>  <p>Viewing 1 - 9 Of 9</p>
<p><b>Pay</b></p> <ul style="list-style-type: none"> <li>Pay</li> <li>Pay History</li> <li>Payroll Inquiry</li> <li>Direct Deposit</li> <li>W2</li> </ul> <p>Click on each category to view contents and make edits if enabled.</p>	<p>The Pay Menu is where employees can view detailed information regarding their pay. The Direct Deposit tab is where changes to banking information can be viewed and updates made when necessary. At the end of the tax year if enabled employees can also view an online version of the W2.</p>  <p>Viewing 1 - 4 Of 4</p>
<p><b>Paid Time Off (if enabled)</b></p> <p><b>Paid Time Off</b></p> <p>Click on each category to view contents and make edits if enabled.</p>	<p>Paid Time Off is where employees can manage their time off balances. Accrual balances can be viewed and requests for time off can be initiated. A list of planned or historical time off periods can also be viewed.</p>  <p>Viewing 1 - 1 Of 1</p>
<p><b>Documents</b></p> <p>Click on folder to view contents if enabled.</p>	<p>Documents – is where employees can view any documents that have been uploaded by the administrator or worksite manager with permission granted to the employee. for viewing.</p>




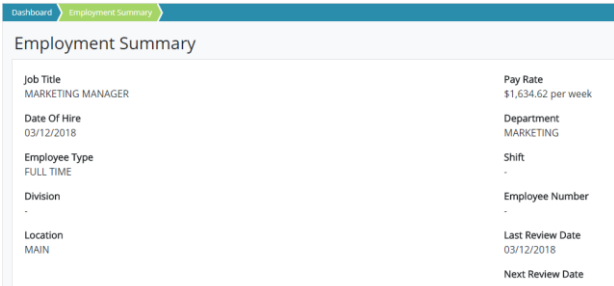
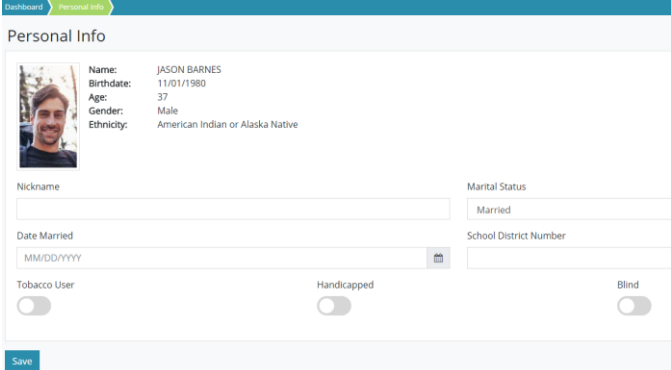
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	<div><div><div>DashboardDocuments</div></div><div>Documents</div><div><div><div>Benefits</div></div><div><div>HR Docs</div></div><div><div>My Documents</div></div></div><div><div><div>DashboardDocumentsMy Documents</div></div><div>My Documents</div><table><thead><tr><th>Name</th><th>Description</th><th>Date</th></tr></thead><tbody><tr><td>Employee Handbook.pdf</td><td>Employee Handbook - placeholder</td><td>2018-05-21</td></tr></tbody></table><div>Viewing 1 - 1 Of 1</div></div></div>	Name	Description	Date	Employee Handbook.pdf	Employee Handbook - placeholder	2018-05-21																																										
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Events	<div><div>View upcoming events and news from your company</div><div><div><div>DashboardEvents</div></div><div>Events</div><div><div>Viewing 1 - 1 Of 1</div><div><div>06/22/2018Company Picnic</div><div><div>Title: Company Picnic</div><div>Organizer: charrisStart: 12:00PMEnd: 04:00PM</div><div>Details: Please join us at Seneca Creek State Park for the Company Picnic!! There will be food, games and prizes!!</div></div></div></div></div></div>																																																
Taxes	<div><div><div>Taxes</div><div><div>Tax Withholding</div><div>W-2</div><div>1095-C</div></div></div><div><div>View tax withholdings, W-2, 1095-C</div><div><div><div>DashboardTax Withholding</div></div><div>Tax Withholding</div><div><div>Federal Tax</div><div><div>Additional Withholding</div><div>Allowance</div><div>Filing Status</div></div><div><div>MD State Tax - Resident</div><div><div>Filing Status</div><div>Total Number Of Exemptions Claimed</div><div>Additional Withholding Per Pay Period</div></div></div><div>Save</div></div></div></div></div>																																																
Onboarding (Link to view onboarding Documents)	<div><div>Click “Onboarding” to open a window to view documents signed at onboarding.</div><div><div><div>HomeMy Current BenefitsMy DocumentsLog Out</div><div>Welcome JASON</div><div><div>List of Documents</div><div><div>Employee DocumentsOther Documents</div><div>Press “Browse” to select a file for upload Choose FileNo file chosen</div><table><thead><tr><th>Document Name</th><th></th><th></th></tr></thead><tbody><tr><td>New Hire FORMS</td><td>2018-0-25, 9:50</td><td>View</td></tr><tr><td>New Hire Forms - E Sign</td><td>2018-0-26, 12:18</td><td>View</td></tr><tr><td>New Hire Forms - PED Relationship Letter</td><td>2018-0-25, 9:33</td><td>View</td></tr><tr><td>New Hire Forms - Handbook Acknowledgment</td><td>2018-0-25, 9:42</td><td>View</td></tr><tr><td>New Hire Forms - Employment Policies</td><td>2018-0-25, 9:42</td><td>View</td></tr><tr><td>Digital Design - Telecommuter</td><td>2018-0-25, 9:43</td><td>View</td></tr><tr><td>Direct Deposit</td><td>2018-0-25, 9:50</td><td>View</td></tr><tr><td>Tax Forms</td><td>2018-0-25, 9:50</td><td>View</td></tr><tr><td>Form 9-9 Section 1-v5</td><td>2018-0-25, 9:50</td><td>View</td></tr><tr><td>Section 11 - Documents from List A</td><td>2018-0-4, 10:35</td><td>View</td></tr><tr><td>Documentation/Documents from List AAdditional List A Documents/Documents from List B &amp; C</td><td>2018-0-4, 10:36</td><td>View</td></tr><tr><td>PED Arbitration Agreement Part 1</td><td>2018-0-4, 10:37</td><td>View</td></tr><tr><td>Arbitration Agreement - Arbitration Agreement</td><td>2018-0-4, 10:36</td><td>View</td></tr><tr><td>Arbitration Agreement - Arbitration Agreement PDF</td><td>2018-0-4, 10:37</td><td>View</td></tr><tr><td>AA_PED_Nov_1-3-2018.pdf</td><td>2018-0-4, 10:37</td><td>View</td></tr></tbody></table></div></div></div></div></div>	Document Name			New Hire FORMS	2018-0-25, 9:50	View	New Hire Forms - E Sign	2018-0-26, 12:18	View	New Hire Forms - PED Relationship Letter	2018-0-25, 9:33	View	New Hire Forms - Handbook Acknowledgment	2018-0-25, 9:42	View	New Hire Forms - Employment Policies	2018-0-25, 9:42	View	Digital Design - Telecommuter	2018-0-25, 9:43	View	Direct Deposit	2018-0-25, 9:50	View	Tax Forms	2018-0-25, 9:50	View	Form 9-9 Section 1-v5	2018-0-25, 9:50	View	Section 11 - Documents from List A	2018-0-4, 10:35	View	Documentation/Documents from List AAdditional List A Documents/Documents from List B & C	2018-0-4, 10:36	View	PED Arbitration Agreement Part 1	2018-0-4, 10:37	View	Arbitration Agreement - Arbitration Agreement	2018-0-4, 10:36	View	Arbitration Agreement - Arbitration Agreement PDF	2018-0-4, 10:37	View	AA_PED_Nov_1-3-2018.pdf	2018-0-4, 10:37	View
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Slavic – If Applicable	Launches to XcelHR Retirement Plan Portal																																																
Time Entry	Clicking on “Time Entry” will launch the employee into the Time and Labor screen.																																																

	<p>Setting will vary based on Company requirements.</p> <p style="text-align: right;">JASON BARNES    Log Off Clock In    6/16/2018 12:43:08 PM</p> <p>CLOCK IN    CLOCK OUT    BREAK    CHANGE JOB CODE    CHANGE COST CODE    VIEW    REQUESTS</p>
Change Password	<p>To update/change your password from inside the portal:</p> <p>Click on the arrow next to the employee silhouette</p> <ul style="list-style-type: none"> <li>• Click Change Password</li> <li>• A new window will appear to enter current and new password</li> <li>• Click “Change Password” button</li> </ul> 

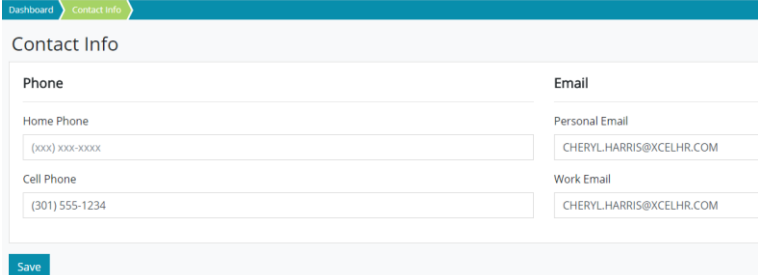
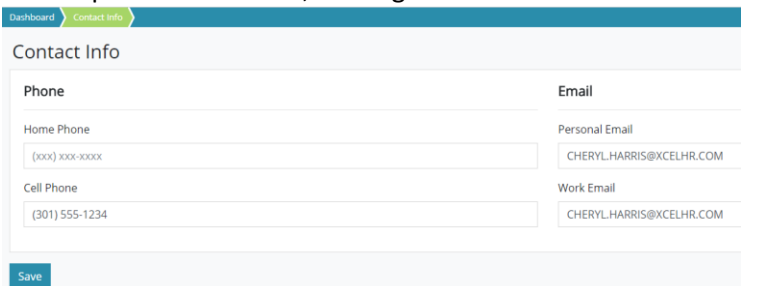
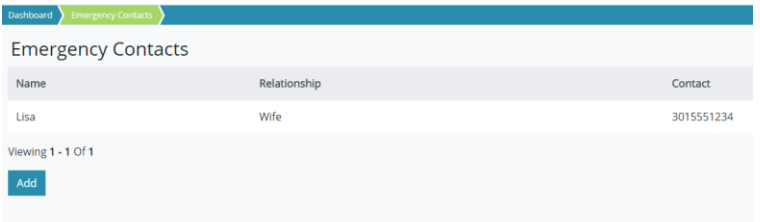
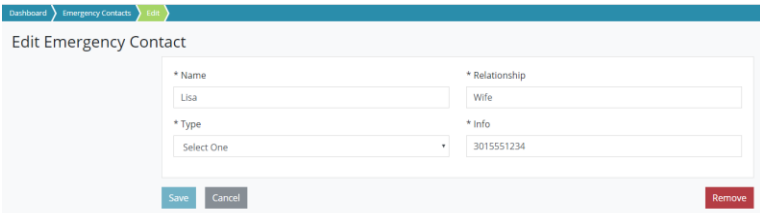


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Common HR and Payroll Tasks		
Category	Path	Contents/Action
Log In	To access the portal log onto: <a href="https://employee.xcelhr.com">https://employee.xcelhr.com</a>	Enter user name and password 
Forgot password	Click on URL: <a href="https://employee.xcelhr.com">https://employee.xcelhr.com</a>	Click on Forgot password link > The link will take you to the page to verify your identity and reset your password
Personal Data – View/Update Employee Overview	<i>Personal &gt; Employment Summary</i> This screen provides the employee a quick snapshot view of employment information.	<b>Employment Data:</b> Job Title, Date of Hire, Employee Type, Division, Location, Pay Rate, Department, Shift, Employee Number, Last Review Date, Next Review Date , 
Personal Info	<i>Personal &gt; Info</i>	<b>Personal Information:</b> Picture, Name, Birth Date, Age, Gender, Ethnicity, Nickname, Marital Status, Date Married, School District Number, Tobacco User, Handicapped, Blind To update, type new information and click Save. 



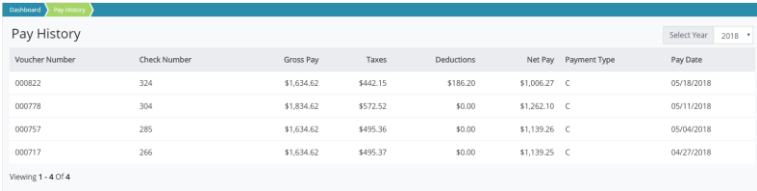
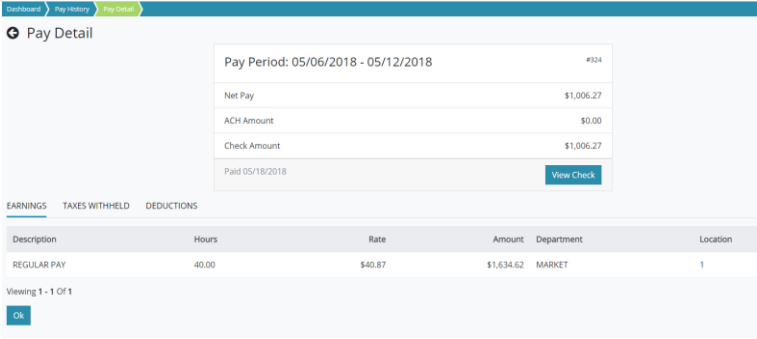
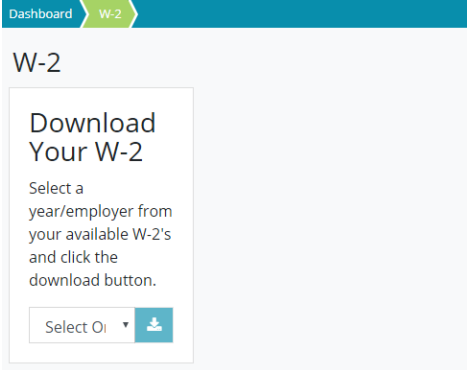
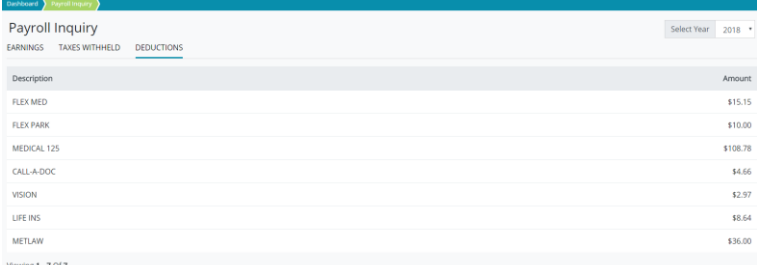
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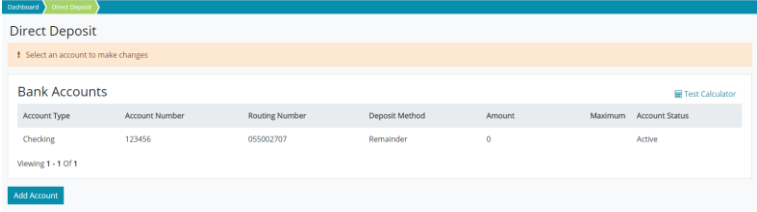
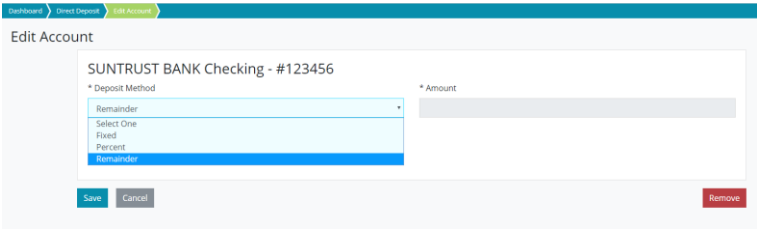
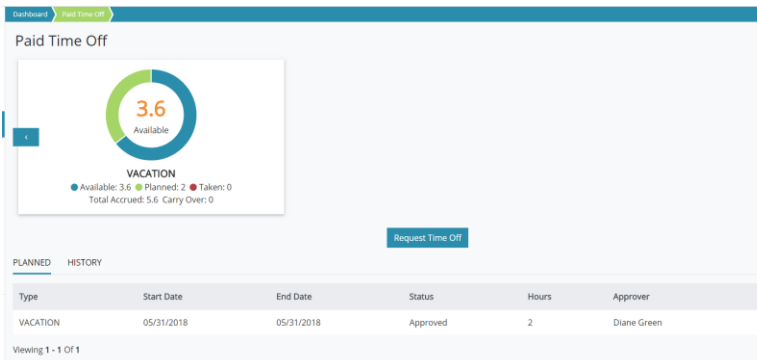
Common HR and Payroll Tasks		
Category	Path	Contents/Action
Contact Info	<i>Contact &gt; Info</i>	<p><b>Contact Info:</b> Home Phone, Cell Phone, Personal Email, Work Email</p> 
Address Change– Update Address Employee information	<i>Personal &gt; Address</i>	<p><b>Make update to Resident, Mailing or W2 address &gt; Click Save</b></p> 
Emergency Contact	<i>Personal &gt; Emergency Contacts</i>	<p><b>Emergency Contacts:</b> Name, Relationship, Contact</p>  <p>Viewing 1 - 1 Of 1</p> <p><b>To edit:</b> Click on the name, update information in the box &gt; Click Save</p>  <p>Click Remove to delete an emergency contact</p>



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### Common HR and Payroll Tasks

Category	Path	Contents/Action
Paycheck – Provides an online view of paystub and check history	<i>Pay &gt; Pay History</i>	<p><b>Select Year</b></p>  <p>Viewing 1 - 4 Of 4</p> <p><b>Click on a row to display details for check</b></p>  <p>Viewing 1 - 1 Of 1</p> <p><b>Click View Check to view paystub</b></p>
W-2	<i>Pay &gt; W-2</i>	<p><b>Select the year</b></p> <p><b>Available W2 forms will appear</b></p> 
Deduction List	<i>Payroll &gt; Payroll Inquiry</i>	<p><b>Select Year &gt; Tab to deductions &gt; Deduction code and amounts will appear</b></p>  <p>Viewing 1 - 7 Of 7</p>

Common HR and Payroll Tasks		
Category	Path	Contents/Action
Direct Deposit	<i>Pay &gt; Direct Deposit</i>	<p>A list of direct deposit accounts will appear. Click on a row to edit the account information.</p>  <ul style="list-style-type: none"> <li>• Select Deposit Method</li> <li>• Note: Remainder should always be selected for one account</li> </ul>  <ul style="list-style-type: none"> <li>• Make changes &gt; Click Save</li> <li>• Click "Update Information button"</li> <li>• Read "Terms and Conditions" pop-up message</li> <li>• Click "Accept"</li> <li>• A success message will appear</li> </ul>
PTO – View Available Hours (If enabled for your company)	<i>Paid Time Off</i>	
PTO Requests – New request (If enabled for your company)	<i>Paid Time Off</i>	<p>After clicking <b>Request Time Off</b> a window will appear with a request template. Enter the PTO type, start and end date, comments (optional) &gt; Click Submit</p> <p>Based on rules set up in your Company PTO plan, time may not be requested if it is not accrued (available).</p>



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Category	Path	Contents/Action
PTO Pending Requests (If enabled for your company)	<i>Paid Time Off</i>	<p>Click on Planned or History tab to view dates</p>
Documents – Company	<i>Documents</i>	<p>Documents with permission set for employee view will appear. Click on folder to view documents.</p>