CLARITY EMPLOYEE AND MANAGER SELF-SERVICE USER GUIDE

PAYMATE SOFTWARE CORPORATION

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Welcome to Clarity Employee and Manager Self-Service!

Thank you for selecting Clarity ESS/MSS. Please contact your administrator for more information about Clarity.

About Clarity

Clarity is a comprehensive, unified payroll and human resources solution ideal for businesses that need advanced capabilities and HR integration. Designed for the U.S. and Canada, each module can work independently or as an integrated system sharing a common database. Clarity is cost-effective, easy to learn, and quick to implement – you can be up and running in less than a month!

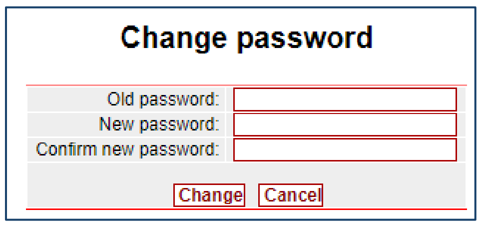
Clarity ESS allows your employees to request time off, manage their own personal records, view their own compensation history, and more to simplify your processes. Managers can also approve or reject employees' timesheets, expenses, and absence requests. ESS/MSS can be accessed from any device, such as PC, Mac, and mobile devices.

Using ESS

Changing Your Password

Your administrator or manager will provide you with your login credentials to your ESS portal. If you would like to change your password to something you can more easily remember, follow these steps.

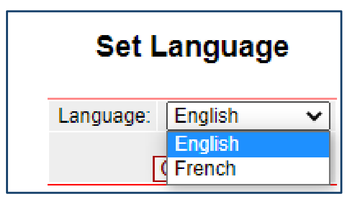
1. Navigate to *Preferences*.
2. Click **“Change Password”**.
3. Enter your *“Old Password”*.
4. Enter and confirm your *“New Password”*.
5. Click **“Change”** to confirm that you’d like to change your password.



Changing Your Language

By default, Clarity ESS will be in English, but you can change it to French, if preferred.

1. Navigate to *Preferences*.
2. Click **“Set Language”**.
3. Select the *“Language”* you’d like to set.

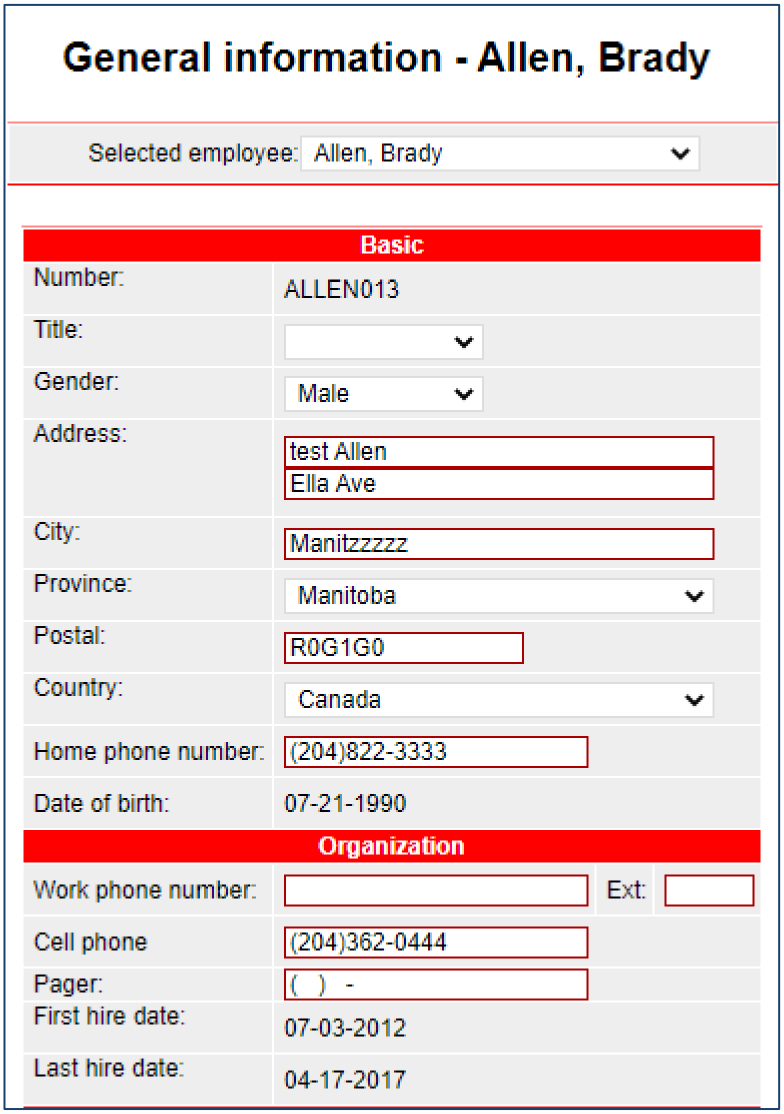


4. Click **“Change”** to confirm that you’d like to set Clarity ESS to a different language.

Employee Profile – General Information

You can view and change any personal information that you need, including your address or phone numbers.

1. Navigate to Employee Profile > General Information.
2. Depending on your company's security settings, if you are a manager, you can view your subordinates' general information. Select the employee in the dropdown field at the top of the page. If you are an employee, you will only view your own general information.
3. Change any information that you need in the *Basic* or *Organization* sections.



General information - Allen, Brady

Selected employee: Allen, Brady

Basic	
Number:	ALLEN013
Title:	
Gender:	Male
Address:	test Allen Ella Ave
City:	Manitzzzzz
Province:	Manitoba
Postal:	R0G1G0
Country:	Canada
Home phone number:	(204)822-3333
Date of birth:	07-21-1990
Organization	
Work phone number:	Ext:
Cell phone	(204)362-0444
Pager:	( ) -
First hire date:	07-03-2012
Last hire date:	04-17-2017

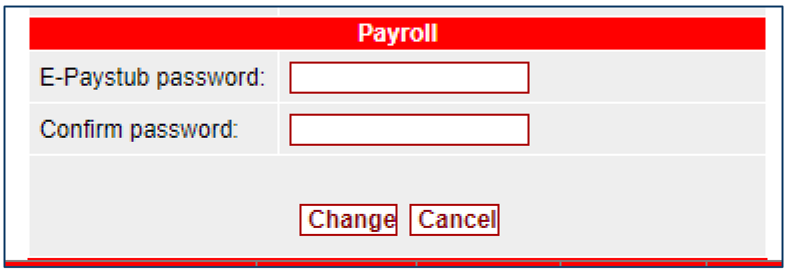
4. Click **"Change"** to save your changes.

Using ESS with Payroll

Changing Your E-Paystub Password

If your organization emails your paystubs to you as a password-protected PDF attachment, you can change the password to use.

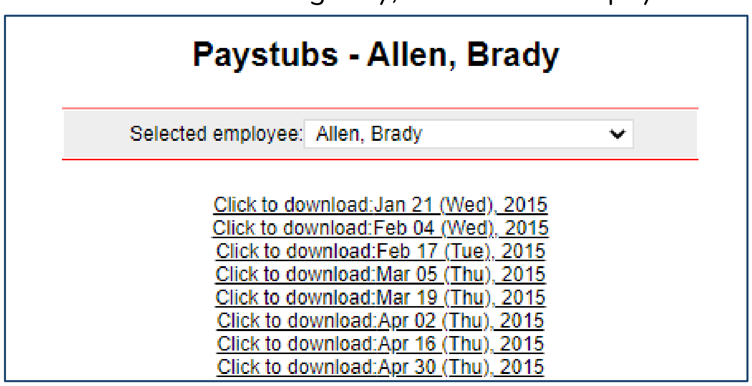
1. Navigate to Employee Profile > General Information.
2. In the *Payroll* section, enter and confirm the password you'd like to use.
3. Click **"Change"** to save your changes.



Accessing Previous Paystubs

You can access, view, and download any previous paystubs.

1. Navigate to Employee Profile > Paystubs.
2. Depending on your company's security settings, if you are a manager, you can view your subordinates' paystubs. Select the employee in the dropdown field at the top of the page. If you are an employee, you will only view your own paystubs.
3. All of your paystubs are listed chronologically, with the oldest paystub at the top of the page.



4. Select the paystub you would like to view and download.
5. Your paystub will automatically be downloaded to your browser's default downloads folder.

Reports – Payment Histories

You can view and download your own payment history.

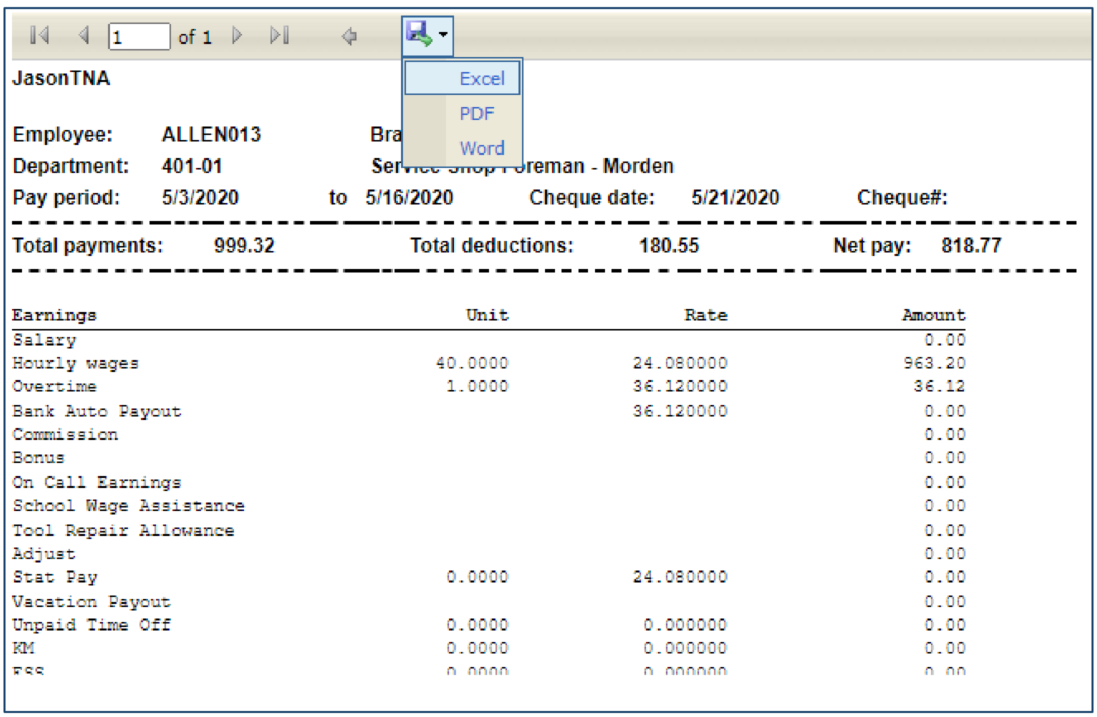
1. Navigate to Reports.
2. Select **“Payment Histories”**.

3. The quick details are shown at the top of the page. Click **“Detail”** in the ‘Details’ column to view the report.

Pay period start date	Pay period end date	Total payments	Total deductions	Net pay	Cheque date	Cheque number	Details
5/3/2020	*5/16/2020*	*999.32*	*180.55*	*818.77*	*5/21/2020*		*Detail*
4/23/2017	5/6/2017	2305.52	702.88	1602.64	5/11/2017	7841	Detail
4/23/2017	5/6/2017	240.80	131.29	109.51	5/11/2017		Detail
4/9/2017	4/22/2017	1250.55	451.09	799.46	4/27/2017	7720	Detail
3/12/2017	3/25/2017	1004.36	226.15	778.21	3/30/2017	7369	Detail

1 2 3 4 5 6 7 8 9 10 ...

4. Click the save button to download the report.

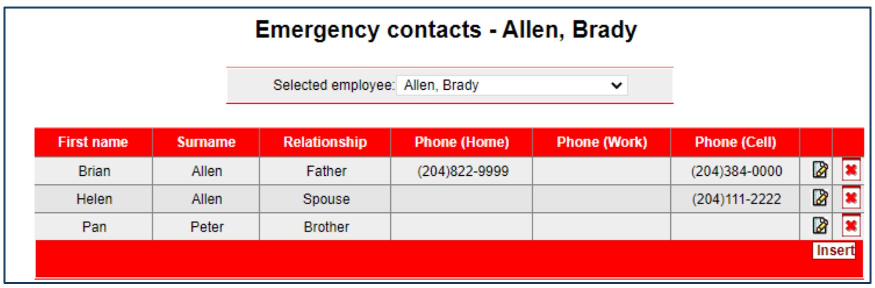


Using ESS with Human Resources

Emergency Contacts

You can add new or update your own emergency contacts' information, such as their address and phone numbers.

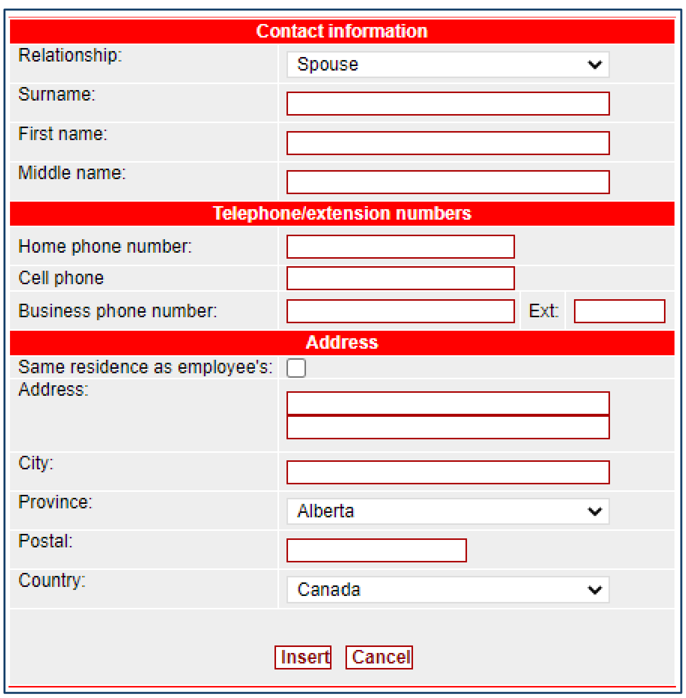
1. Navigate to Employee Profile > Emergency Contact.
2. Depending on your company's security settings, if you are a manager, you can view your subordinates' emergency contacts. Select the employee in the dropdown field at the top of the page. If you are an employee, you will only view your own emergency contacts.
3. Your existing emergency contacts will be shown at the top of the screen. Click on the pencil button to edit their information.


Emergency contacts - Allen, Brady

Selected employee: Allen, Brady

First name	Surname	Relationship	Phone (Home)	Phone (Work)	Phone (Cell)		
Brian	Allen	Father	(204)822-9999		(204)384-0000		
Helen	Allen	Spouse			(204)111-2222		
Pan	Peter	Brother					
							Insert

4. Click on the red **"x"** button to delete the emergency contact.
5. To add a new emergency contact, enter their information in the fields.


Contact information

Relationship:	Spouse
Surname:	
First name:	
Middle name:	

Telephone/extension numbers

Home phone number:			
Cell phone			
Business phone number:		Ext:	

Address

Same residence as employee's:	
Address:	
City:	
Province:	Alberta
Postal:	
Country:	Canada

Insert Cancel

6. Click **"Insert"** to add the new emergency contact.

Employment History

1. Navigate to Employee Profile > Employment History.
2. Depending on your company's security settings, if you are a manager, you can view your subordinates' employment history, along with your own. Select the employee in the dropdown field at the top of the page. If you are an employee, you will only view your own employment history.
3. All changes to the employment history for the selected employee, along with any comments, are shown here. The most recent changes are at the top of the page.

Employment history - Allen, Brady

Selected employee: Allen, Brady

Effective date	Division	Department	Position	Location	Employment type	Manager	Status	Annual salary	FTE amount	Summary	COMMENT
7/28/2021	Main	Service Shop Foreman - Morden		Morden		Benjamin Bergen	A	0.0000		Manager changed.	
7/28/2021	Main	Service Shop Foreman - Morden	Service Technician	Morden		Benjamin Bergen	A	0.0000		Position changed.	
4/11/2019	Main	Service Shop Foreman - Morden		Morden		Curtiss Barrett	A	0.0000		Manager changed.	
7/13/2017	Main	Service Shop Foreman - Morden		Morden		Larry Brice	A	0.0000		Department changed.	
4/17/2017	Main	Service Shop Foreman - Morden		Morden		Curtiss Barrett	A	0.0000		Status changed.	
4/17/2017	Main	Service Technician - Morden		Morden		Larry Brice	A	0.0000		Status changed.	
3/18/2017	Main	Service Technician - Morden		Morden		Larry Brice	T	0.0000		Status changed.	
3/14/2017	Main	Service Technician - Morden		Morden		Larry Brice	A	0.0000		Annual salary changed. Hourly rate changed.	
12/25/2016	Main	Service Technician - Morden		Morden		Larry Brice	A	0.0000		Status changed.	

Training Events

1. Navigate to Employee Profile > Training.
2. Depending on your company's security settings, if you are a manager, you can view your subordinates' training events, along with your own. Select the employee in the dropdown field at the top of the page. If you are an employee, you will only view your own training events.
3. All records of training events for the selected employee are shown here. Click **"Detail"** in the 'Details' column to view or modify the record.

Training - Allen, Brady

Selected employee: Allen, Brady

Training Event	Training Course	Type	Status	From date	To date	Location	Employee cost	Company cost	Days	Hour per day	Objective	Instructor	Details
IT Developer	IT Developer	Other	Step2	1/1/2021	1/31/2021	Alberta	0.0000	0.0000	31	4	Be familiar with the project requirements and run test cases	Bill Gates	Detail

4. Click **"Insert"** to create a new training event for the selected employee.
5. Enter all relevant fields.

Training details

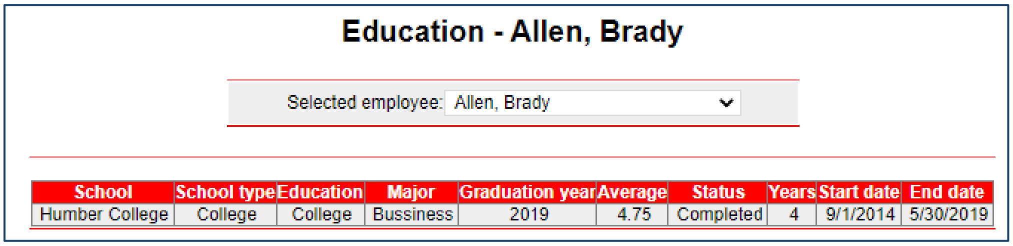
Training event:	IT Developer		
Training course:	IT Developer	Type:	Other
Instructor:	Bill Gates	Location:	Alberta
Company cost:	0.0000	Employee cost:	0.0000
Start date:	1/1/2021	End date:	1/31/2021
Number of days:	31	Hours per day:	4
Adeptness level:	Moderate	Status:	Step2
☑ Satisfactory completed		☐ Evaluation sent to employee	
Objective:	Be familiar with the project requirements and run test cases		
Comment:			

Save

6. Click **"Save"** to save your changes.

Education

1. Navigate to Employee Profile > Education.
2. Depending on your company's security settings, if you are a manager, you can view your subordinates' education, along with your own. Select the employee in the dropdown field at the top of the page. If you are an employee, you will only view your own education.
3. Details of the education for the selected employee are shown here.



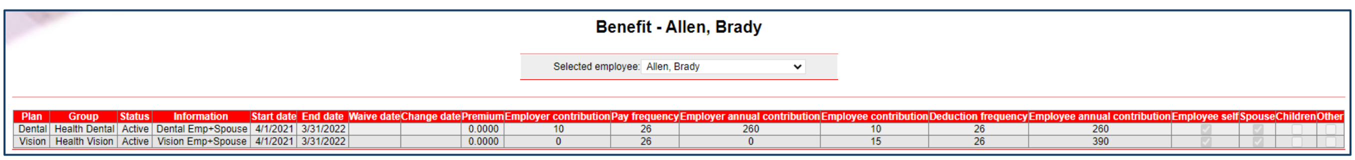
Education - Allen, Brady

Selected employee: Allen, Brady

School	School type	Education	Major	Graduation year	Average	Status	Years	Start date	End date
Humber College	College	College	Bussiness	2019	4.75	Completed	4	9/1/2014	5/30/2019

Enrolled Benefit Plans

1. Navigate to Employee Profile > Benefits.
2. Depending on your company's security settings, if you are a manager, you can view your subordinates' enrolled benefit plans, along with your own. Select the employee in the dropdown field at the top of the page. If you are an employee, you will only view your own enrolled benefit plans.
3. All enrolled benefit plans for the selected employee are shown here.



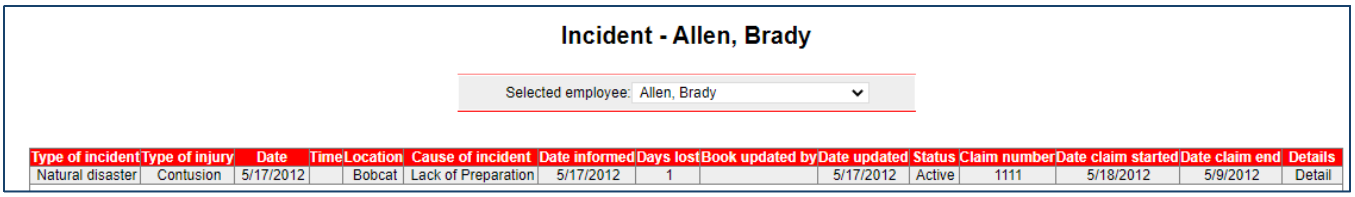
Benefit - Allen, Brady

Selected employee: Allen, Brady

Plan	Group	Status	Information	Start date	End date	Waive date	Change date	Premium	Employer contribution	Pay frequency	Employer annual contribution	Employee contribution	Deduction frequency	Employee annual contribution	Employee self	Spouse	Children	Other
Dental	Health Dental	Active	Dental Emp+Spouse	4/1/2021	3/31/2022			0.0000	10	26	260	10	26	260	☑	☑	☐	☐
Vision	Health Vision	Active	Vision Emp+Spouse	4/1/2021	3/31/2022			0.0000	0	26	0	15	26	390	☑	☑	☐	☐

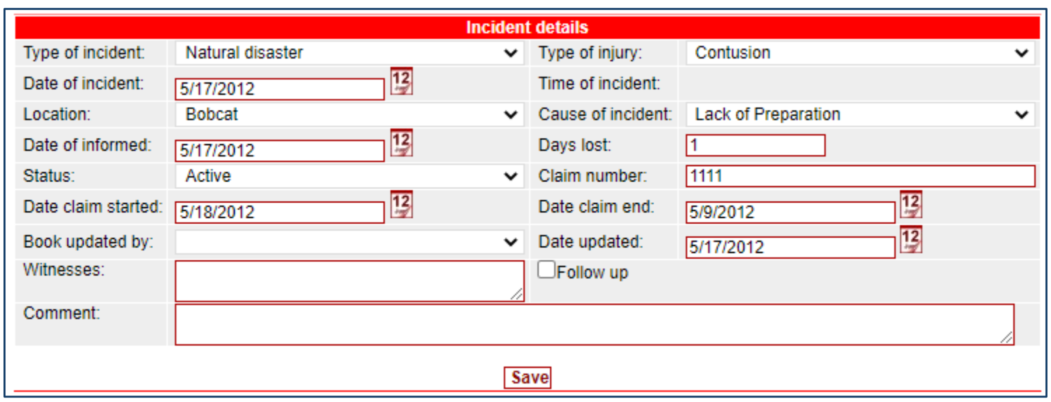
Incident and Injury Reporting

1. Navigate to Employee Profile > Incidents.
2. Depending on your company's security settings, if you are a manager, you can view your subordinates' incident and injury records, along with your own. Select the employee in the dropdown field at the top of the page. If you are an employee, you will only view your own incident and injury records.
3. All records of any injuries or incidents for the selected employee are shown here. Click **"Detail"** in the 'Details' column to view or edit the details of the record.



Type of incident	Type of injury	Date	Time	Location	Cause of incident	Date informed	Days lost	Book updated by	Date updated	Status	Claim number	Date claim started	Date claim end	Details
Natural disaster	Contusion	5/17/2012		Bobcat	Lack of Preparation	5/17/2012	1		5/17/2012	Active	1111	5/18/2012	5/9/2012	Detail

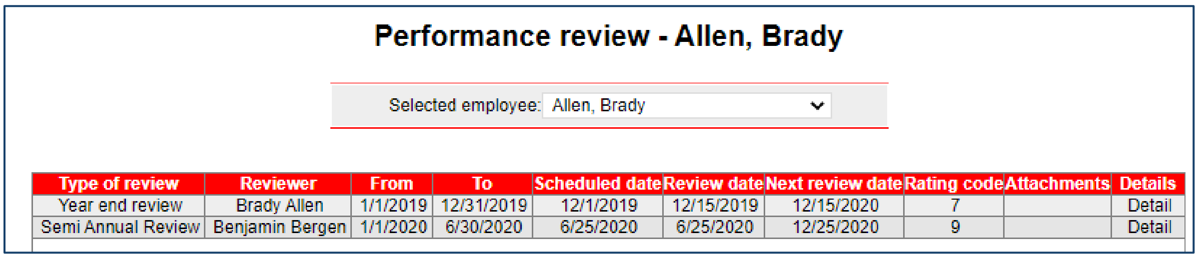
4. To create a new incident or injury record for the selected employee, click **"Insert"**.
5. Enter all relevant fields.



6. Click **"Save"** to save your changes.

Performance Reviews

1. Navigate to Employee Profile > Performance Review.
2. Depending on your company's security settings, if you are a manager, you can view your subordinates' performance reviews, along with your own. Select the employee in the dropdown field at the top of the page. If you are an employee, you will only view your own performance reviews.
3. All records of performance reviews for the selected employee are shown here. These may be your own performance reviews, or the employees that you are the reviewer for. Click **"Detail"** in the 'Details' column to view each review's details.

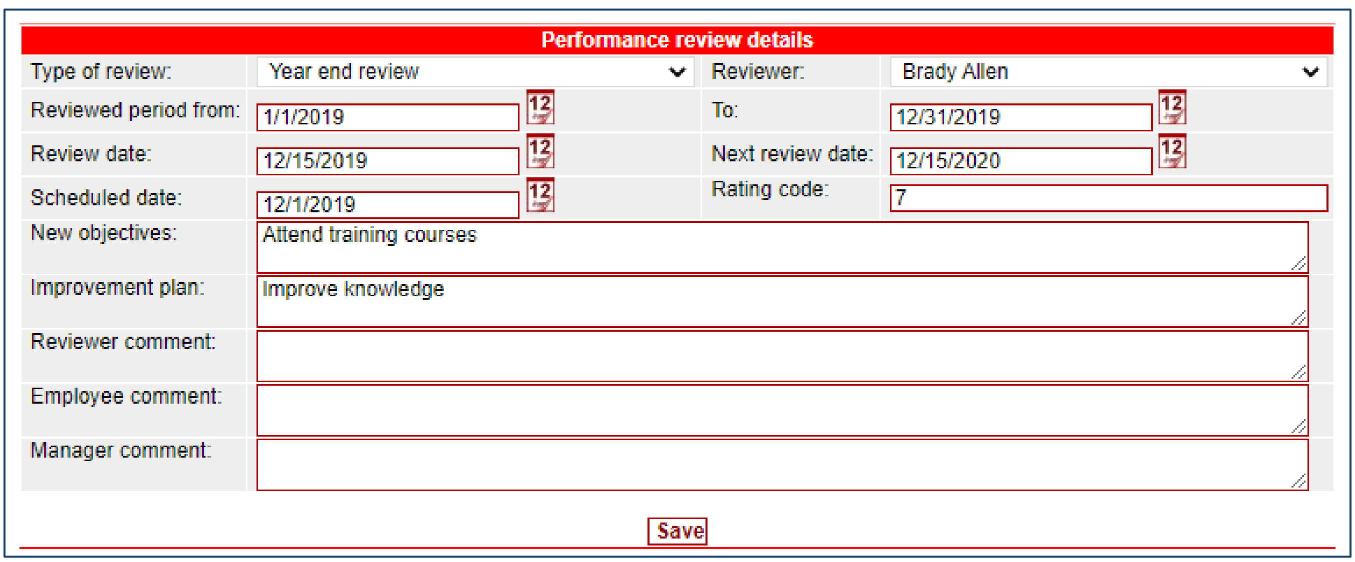


Performance review - Allen, Brady

Selected employee: Allen, Brady

Type of review	Reviewer	From	To	Scheduled date	Review date	Next review date	Rating code	Attachments	Details
Year end review	Brady Allen	1/1/2019	12/31/2019	12/1/2019	12/15/2019	12/15/2020	7		Detail
Semi Annual Review	Benjamin Bergen	1/1/2020	6/30/2020	6/25/2020	6/25/2020	12/25/2020	9		Detail

4. To add a new performance review, click **"Insert"**.
5. Enter all relevant fields.



Performance review details

Type of review:	Year end review	Reviewer:	Brady Allen
Reviewed period from:	1/1/2019	To:	12/31/2019
Review date:	12/15/2019	Next review date:	12/15/2020
Scheduled date:	12/1/2019	Rating code:	7
New objectives:	Attend training courses		
Improvement plan:	Improve knowledge		
Reviewer comment:			
Employee comment:			
Manager comment:			

Save

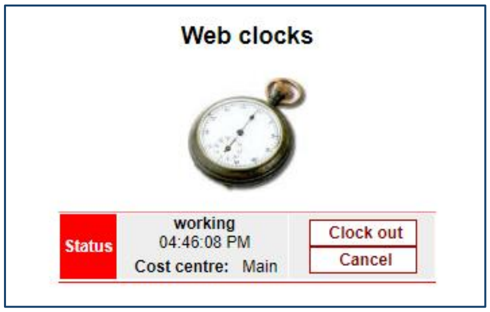
6. Click **"Save"** to save your changes.

Using ESS with TnA

Clocking In and Out

You can clock in and out each day that you are working.

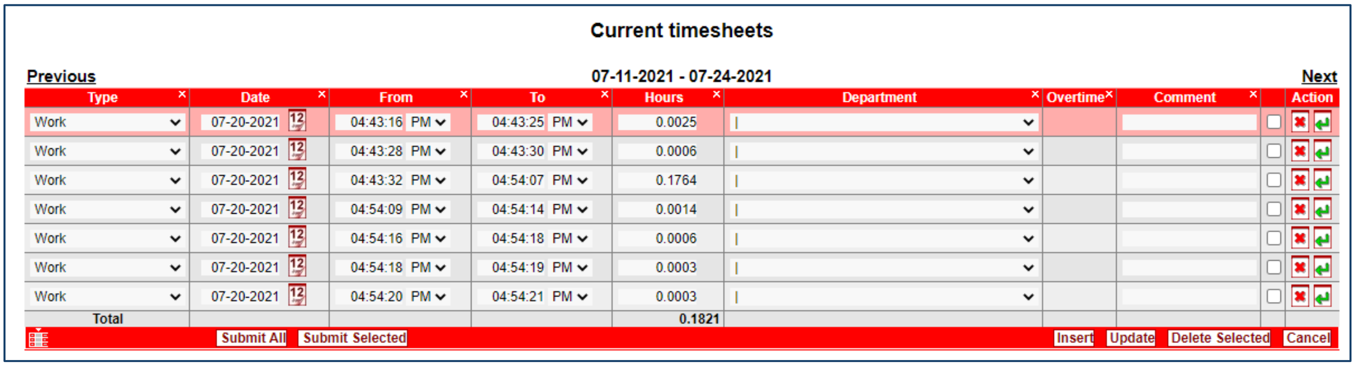
1. Navigate to *Web Clocks*.
2. Select the applicable *"Cost Centre"*.
3. Click **"Clock In"** to clock in and begin the working time.
4. Click **"Clock Out"** or **"Cancel"** to clock out and stop the working time.



Timesheets

You can update or modify your timesheets as required before you send it off to payroll. Your timesheet may be required to be approved before it can be sent to payroll. You can view the status of your timesheets in the 'Submitted' tab. If your timesheet was approved, you can view it in the 'Approved' tab. If your timesheet was rejected, you can view it in the 'Rejected' tab.

1. Navigate to Timesheets > Current. This is a list of all your current timesheets that have not yet been submitted.
2. Change any fields as required.
   a. *"Type"* refers to the type of entry to be made in the timesheet. This can be the work you are doing, or time off that you took.
   b. *"Date"* identifies the date that you worked or took off.
   c. *"From"* and *"To"* identifies that period of time that you worked or took off.
   d. *"Hours"* refer to the duration of time that you worked or took off.
   e. *"Department"* refers to the department of which you worked. If you took time off, you can leave this blank.
   f. You can enter any comments as required.



Current timesheets

Previous | 07-11-2021 - 07-24-2021 | Next

Type	Date	From	To	Hours	Department	Overtime	Comment	Action
Work	07-20-2021	04:43:16 PM	04:43:25 PM	0.0025	|			
Work	07-20-2021	04:43:28 PM	04:43:30 PM	0.0006	|			
Work	07-20-2021	04:43:32 PM	04:54:07 PM	0.1764	|			
Work	07-20-2021	04:54:09 PM	04:54:14 PM	0.0014	|			
Work	07-20-2021	04:54:16 PM	04:54:18 PM	0.0006	|			
Work	07-20-2021	04:54:18 PM	04:54:19 PM	0.0003	|			
Work	07-20-2021	04:54:20 PM	04:54:21 PM	0.0003	|			
Total				0.1821				

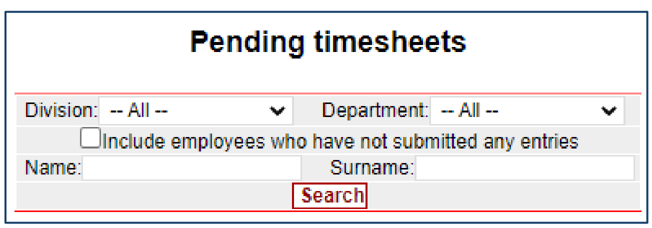
Submit All | Submit Selected | Insert | Update | Delete Selected | Cancel

3. If you want to add a new entry, click **"Insert"**.
4. Once you are ready to submit your timesheet, click the green arrow button for each entry that you want to submit. If you want to submit multiple entries in your timesheet at once, select each entry using the checkboxes and click **"Submit Selected"**. If you want to submit all entries in your timesheet, click **"Submit All"**.
5. If you want to delete an entry in your timesheet, click the red **"x"** button. If you want to delete multiple entries in your timesheet at once, select each entry using the checkboxes and click **"Delete Selected"**.

Approving or Rejecting Timesheets

Depending on your company's security settings, timesheets may be required to be approved before they can be sent to payroll for processing.

1. Navigate to Approvals > Pending Timesheets.
2. All pending timesheets are shown here. You can use the filters provided to filter specific timesheets. Click each sheet, or use the green pencil icon, to view or edit the timesheet's details.



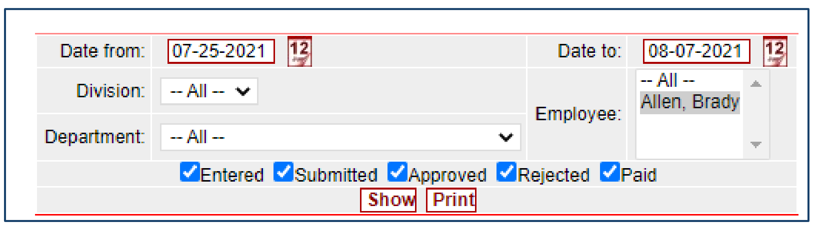
3. Click **"Search"** to view all timesheets that are pending approval.
4. Click the red **"x"** button to delete the timesheet.
5. Click the green checkmark button to approve the timesheet. If you want to approve multiple timesheets, use the checkboxes provided and click **"Approve Selected"**. If you want to approve all timesheets, click **"Approve All"**.
6. Click the red circle button to reject the timesheet. If you want to reject multiple timesheets, use the checkboxes provided and click **"Reject Selected"**. If you want to reject all timesheets, click **"Reject All"**.

Employee Timesheet Reports

The *Status Report* gives you the status of each timesheet that you have, including timesheets that were submitted or approved. The *Summary Report* gives you a quick summary of all of your timesheets.

1. Navigate to Reports.
2. Select **"Status Report"** or **"Summary Report"**.

3. Edit the filters as required, such as the date range or for a specific department. If you want to look for a specific status of your timesheets, use the checkboxes provided.



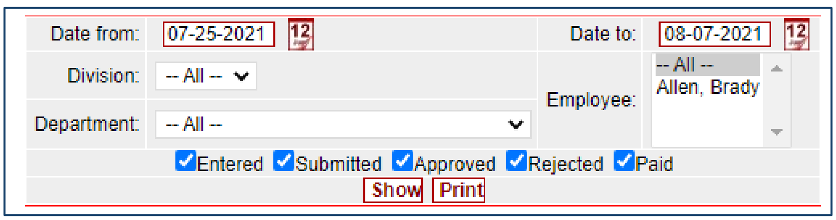
4. Click **"Show"** to preview the report.
5. Click **"Print"** to print the report. Your browser's printer dialogue box will appear.

Manager Timesheet Reports

Depending on your company's security permissions, if you are a manager, you may be able to view additional reports, such as the *Timesheets Exception Report* or the *Timesheets Audit Report*.

1. Navigate to Reports.
2. Select **"Exception Report"** or **"Audit Report"**.

3. Edit the filters as required, such as the date range or for a specific department. If you want to look for a specific status of your timesheets, use the checkboxes provided.



4. Click **"Show"** to preview the report.
5. Click **"Print"** to print the report. Your browser's printer dialogue box will appear.

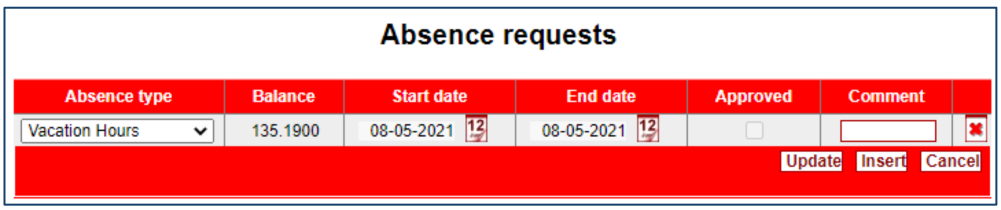
Absence Requests

You can request an absence, or time off, and submit it for approval. The requests that you send will be included in your timesheets.

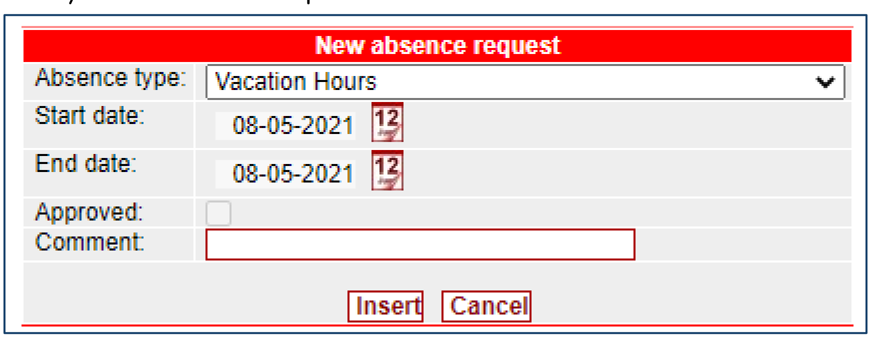
1. Navigate to Employee Profile > Absence Request.
2. Your absence balances are shown at the bottom of the page for your reference.

Absence Type	Payroll Category	Date Range	Carried Over	Entitlement	Adjustment	Taken	Unapproved Taken	Remaining Assumed
Sick Hours	Sick paid	01-01-2016-12-31-2016	0	16	0	0	0	16
Vacation Hours	Vacation paid	01-01-2017-12-31-2017	140.6	22.59	-8	20	0	135.19
Sick Hours	Sick paid	01-01-2017-12-31-2017	0	0	0	8	0	-8
Stat Hours	Stat Pay	01-01-2017-12-31-2017	0	0	0	9.17	0	-9.17
BANK	Bank Time Out	01-01-2016-12-31-2016	0	0	0	0	0	0
BANK	Bank Time Out	01-01-2017-12-31-2017	0	0	0	0	0	0
KM	KM	01-01-2019-12-31-2019	0	0	15	0	0	15
Unpaid Leave No Pay	Unpaid Time	01-01-2016-12-31-2016	0	0	0	0	0	0

3. Click **"Insert"** to add a new absence request.



4. Enter the required fields.
   a. <u>"Absence Type"</u> identifies what kind of absence you are taking, such as vacation.
   b. <u>"Start Date"</u> and <u>"End Date"</u> identifies when you will be taking the absence.
   c. Enter any comments as required.



5. Click **"Insert"** to submit the request for approval.

Your Absence Balances

You can view a quick summary of your current balances for each absence or time off type.

1. Navigate to Employee Profile > General Information.
2. At the bottom of the page are all your absence types.

Absence Type	Payroll Category	Date Range	Carried Over	Entitlement	Adjustment	Taken	Unapproved Taken	Remaining Assumed
Sick Hours	Sick paid	01-01-2016-12-31-2016	0	16	0	0	0	16
Vacation Hours	Vacation paid	01-01-2017-12-31-2017	140.6	22.59	-8	20	0	135.19
Sick Hours	Sick paid	01-01-2017-12-31-2017	0	0	0	8	0	-8
Stat Hours	Stat Pay	01-01-2017-12-31-2017	0	0	0	9.17	0	-9.17
BANK	Bank Time Out	01-01-2016-12-31-2016	0	0	0	0	0	0
BANK	Bank Time Out	01-01-2017-12-31-2017	0	0	0	0	0	0
KM	KM	01-01-2019-12-31-2019	0	0	15	0	0	15
Unpaid Leave No Pay	Unpaid Time	01-01-2016-12-31-2016	0	0	0	0	0	0

Approving or Rejecting Absence Requests

Depending on your company's security settings, absence requests may be required to be approved before they can be sent to your timesheets.

1. Navigate to Employee Profile > Absence Request.
2. Select the employee in the dropdown field.

Absence requests - Allen, Brady

Selected employee: Allen, Brady

3. All absence requests for the selected employee are shown here.
4. Use the provided checkbox in the 'Approved' column to approve of the absence request.

Absence type	Balance	Start date	End date	Approved	Comment
Vacation Hours	135.1900	08-06-2021	08-06-2021	☑	

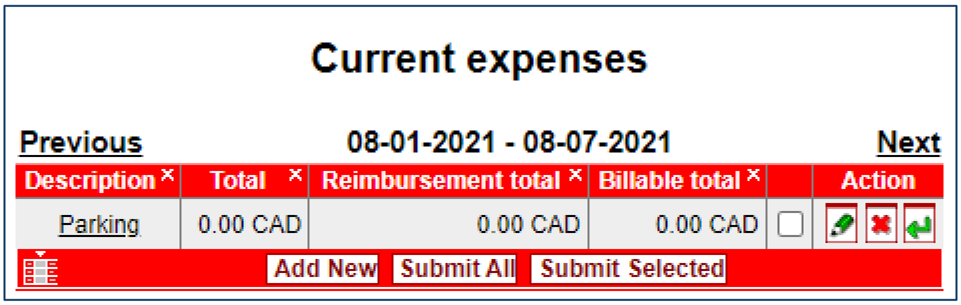
Update Insert Cancel

5. Click **"Update"** to save your changes.

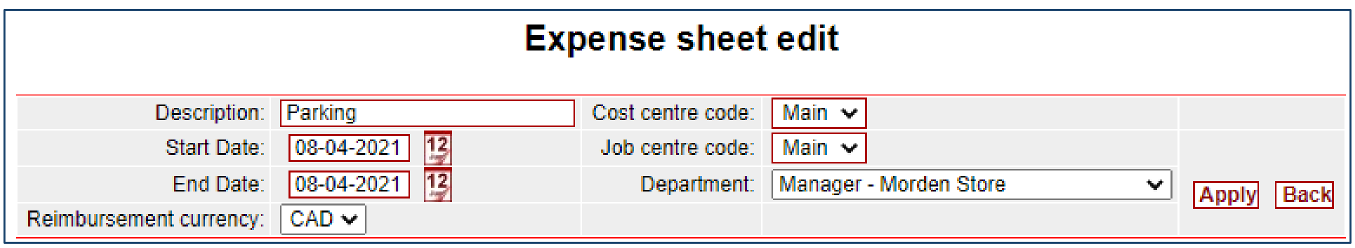
Expenses

Depending on your company's security permissions, you may be able to submit expenses that will get tracked within Clarity. As well, your expenses may be required to be approved before they are sent to Clarity.

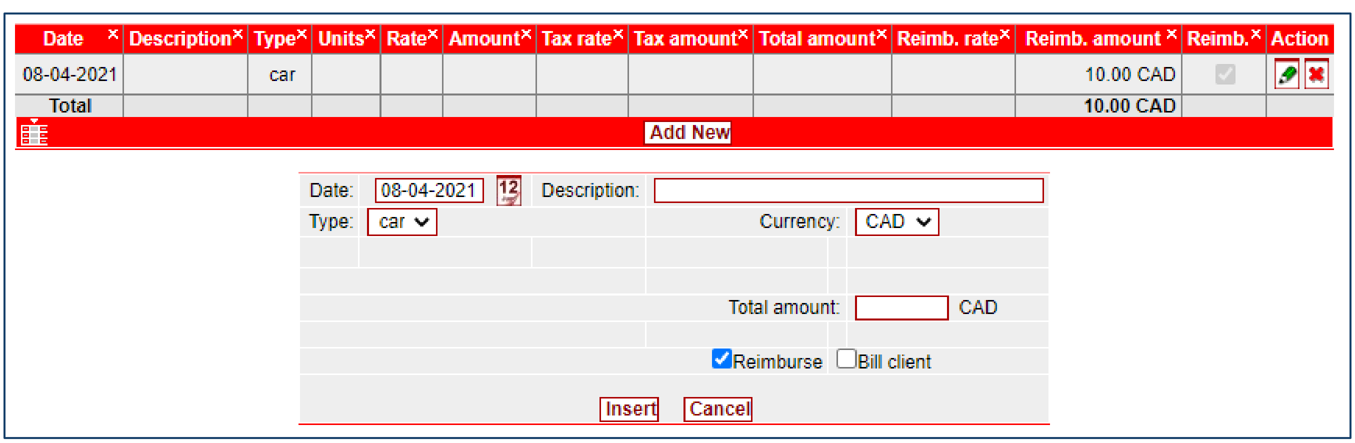
1. Navigate to Expenses > Current.
2. Your current expense sheets (not yet submitted, approved, or rejected) are shown. Click on the expense sheet to view or edit its details. You can also click the pencil button for the same function.



3. To add a new expense sheet, click **"Add New"**.
4. Enter all required fields.



5. Click **"Create"** to save your changes.
6. Entries in the expense sheet are shown below the expense sheet details. You can view or edit the details of an existing expense entry by clicking on it or clicking the green pencil icon.
7. Click **"Add New"** to add a new entry into the expense sheet.
8. Enter all relevant fields.

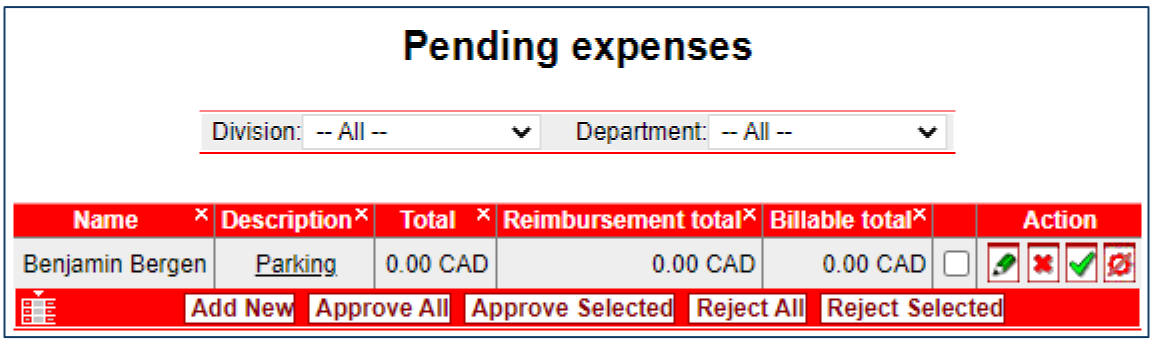


9. Click **"Insert"** to enter the entry into the expense sheet. If you're updating an expense entry, click **"Update"**.
10. Click the red **"x"** button to delete the expense record.
11. Click the green arrow button to submit the expense for approval. If you want to submit multiple expenses, use the checkboxes and click **"Submit Selected"**. If you want to submit all expenses, click **"Submit All".**

Approving or Rejecting Expense Submissions

Depending on your company's security permissions, all expense submissions may be required to be approved before it is sent and tracked in Clarity.

1. Navigate to Approvals > Pending Expenses.
2. All pending expense sheets are shown here. You can use the filters provided to filter out specific sheets. Click each sheet, or use the green pencil icon, to view or edit the sheet's details.



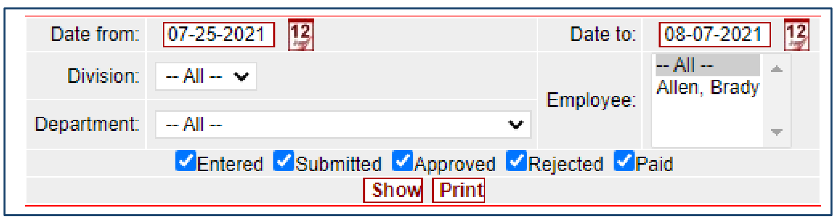
3. Click the red **"x"** button to delete the expense sheet.
4. Click the green checkmark button to approve the expense sheet. If you want to approve multiple sheets, use the checkboxes provided and click **"Approve Selected"**. If you want to approve all sheets, click **"Approve All"**.
5. Click the red circle button to reject the expense sheet. If you want to reject multiple sheets, use the checkboxes provided and click **"Reject Selected"**. If you want to reject all sheets, click **"Reject All"**.

Expense Reports

There are multiple reports that you can access for expenses, including the *Expense Summary Report, Expense Detail Report*, and *Expense Audit Report.*

1. Navigate to Reports.
2. Click on any of the *Expenses* reports.

3. Edit the filters as required, such as the date range or for a specific department. If you want to look for a specific status of your expense sheets, use the checkboxes provided.



4. Click **"Show"** to preview the report.
5. Click **"Print"** to print the report. Your browser's printer dialogue box will appear.