Revised February 3, 2009

Employee Self Service (ESS) Instructions for JAWS Users

General Tips and Instructions

Please follow these instructions carefully the first time you use ESS with JAWS. It will get you through the screens successfully and give you the opportunity to learn how the JAWS keyboard shortcuts work in this environment. If you are an experienced JAWS user, you may find other ways to navigate the application by experimenting and exploring the screens in the future.

IMPORTANT NOTES for JAWS Version 10 Users:

JAWS Version 10 defaults to “Forms Mode On” automatically whenever you move into combo box controls. This feature causes some problems in BEACON, not allowing you to move through the drop-down list boxes that you need to use in selecting leave and time entries on your timesheets, for example. For this reason, you must turn this feature off when you go into BEACON. From then on, each time you use BEACON, JAWS will function without the automatic forms feature activated and the instructions in this document should work for you as they did for the previous versions of JAWS.

INSTRUCTIONS:

1. After you log on to BEACON, wait until the Welcome page loads.
2. Then press INSERT+SHIFT+V. You should hear “JAWS dialogue – Personalize Settings for My BEACON.its.state.nc.gov” to indicate that the Personalize Settings JAWS dialogue box is open.
3. Use your down-arrow key to select “Auto Forms Mode On” and press your space bar to change the selection. You should then hear “Auto Forms Mode Off”.
4. Finally, press the Escape key or tab until you hear “Close button” and then press the space bar to exit the JAWS window.

As you continue using BEACON and each time you return to the BEACON web site, Forms Mode should be off, so use the instructions that follow to move in and out of Forms Mode as you go through your BEACON activities.

Tips:

- You must have the **Accessibility Feature activated** to use JAWS on these screens. Since this is a one-time requirement, the instructions are in another document. Please contact your supervisor if you have not yet completed this activation using the Personalize link.

- **Moving in and Out of Forms Mode**: As noted several times throughout the instructions, you may encounter some problems when you are either in or out of forms mode and need to switch back. If your cursor is in an edit box where you are trying to make an entry, try pressing the Enter key to get back into forms mode. Or if you are trying to use a keyboard shortcut that's not working, press the plus sign on the NUMPAD to get out of forms mode.
- **Don't go too fast**! Until you become familiar with the screens, listen a little longer than you might ordinarily to a field description in case the item you are searching for is preceded by some extra information. For example, you may hear "Drop down box, 1 of 10 items" before you hear "Time Worked," the item you are seeking.

The instructions that follow contain step-by-step actions as well as explanations of screens and content so that you can orient yourself and understand how and why you are taking certain steps.

Time Categories in BEACON

You will fall into one of three categories that affect how you record your time in BEACON. Contact your manager or HR representative if you are not sure category applies to you:

a. Positive time / Actual pay: If you must submit a timesheet to get paid, record all of your hours including hours worked and leave taken on BEACON.
b. Positive time / Exception pay: If you get paid a regular salary regardless of when your timesheet is submitted, you must record all hours including hours worked and leave taken on BEACON, an agency approved paper time sheet, or online timesheet.
c. Negative time: If you are not Subject to FSLA and not required to enter time worked on a timesheet, you must enter variations only from your normal schedule, such as leave taken or extra hours worked to count toward comp time.

Logging On

1. Log onto BEACON SAP portal at https://mybeacon.nc.gov using your NCID log-on ID and password (obtained through your agency).
   a. Since this is a form, tab until you hear "NCID star Edit" and press Enter to hear "Forms mode on, secure connection" before you begin typing in your NCID.
   b. After typing in your NCID, tab until you hear the "Password star password, edit" field and type in your password and then press Enter.
   c. When you are on the BEACON home page, you will hear "Home - SAP Netweaver Portal."

d. If you are using JAWS Version 10 follow the **IMPORTANT NOTES for JAWS Version 10 Users instructions to turn off an automatic setting** at the beginning of this document.

RECORDING, SAVING, AND RELEASING YOUR TIME OR LEAVE FOR APPROVAL

From the BEACON home page, follow these steps:

1. Press Tab until you hear “My Time link” and press Enter.
2. The My Time Entry screen loads.
3. Press Tab until you hear “Record Working Time link” and press Enter.
4. The Record Working Time Window loads defaulting to your current week.
    - If you want to confirm that you are on the correct screen, “Record Working Time,” press Insert + T to hear the title.
5. Next, you will hide the calendar option. If you don’t hide the calendar, you may get stuck tabbing through the calendar and find it difficult to make entries on the time sheet. To hide the calendar option, follow these steps:
    - Tab until you hear “Calendar, Hide Calendar link” and press Enter to hide the calendar. You will then hear “Calendar, Show Calendar link.”

You are almost ready to enter your hours worked. The following information describes the general layout of the screen before you get started. On the Weekly View screen, there are three rows. The first row, labeled Plan, contains your planned work hours (8 hours per day, for example). The second row, labeled Act for Actual, is blank initially, but will contain your hours worked after you enter them. The third row labeled Time Worked is where you will enter your hours or leave taken for each day.

Note: If you work extra hours in a pay period, your hours will be automatically calculated for comp time or overtime, and you do not need to identify them as overtime in any way on your time sheet. You simply report the total hours worked such as 9 hours for one normal 8-hour workday as part of your Time Worked hours and the system will apply the extra hour to overtime pay or comp time as appropriate.

Follow these steps to enter your time worked and leave taken:

1. Tab until you hear “Week From dash Input Field for Date” followed by the current week’s date that began on Sunday.
2. If you want to enter time for a previous week, type in the Sunday begin-date for the week that you are entering your time using MM/DD/YYYY format. (Option: If you only need go back to the previous week’s time, press Shift + Tab once to hear “Return to Previous Week graphic” and click Enter.)
3. Tab until you hear “Week From dash Input Field for Date” followed by the Sunday Start date in the From field for the week you are seeking.

4. Press the Enter key to enter forms mode. This is a very important step! If you do not press Enter now and instead go into forms mode later, the JAWS reader goes through a much longer description of a list that must go through to select your time entry codes.

When you are on the Sunday start date for the correct week, follow these steps to enter your hours:

If you are a **Positive Time** employee, follow these instructions to enter **hours worked**:

a. Tab through the days of the week until you hear “Drop-down List Box dash no item selected” and “To open list, press F4.” If you are not in forms mode, first press Enter and then Press the F4 key at the top of the keyboard.
b. Use the down arrow key to go through all of the choices listed in alphabetical order until you hear the type of entry you want to make, such as “Time Worked” for the first day of the week that you want to make an entry.
c. Assuming that you want to choose the “Time Worked” option first, follow the steps below to enter the number of hours you worked for each day of the week.
    1. Press Tab to move to the next field and the system will leave the “Time Worked” selection in that row header.
    2. Tab until you hear “Input field” followed by the date for the first entry you want to make for hours worked. To make sure that you are on the correct date, use the up arrow until you hear the date. Use the down arrow to return to the edit cell.
    3. Tab through the days and enter hours for each day that you worked. Use whole numbers such as 8 or include decimal points for partial hours such as 8.5. You do not need to enter zeros for days that you did not work. You do not have to press Enter after you type in the hours for each day. Just tab to the next day and your hours will remain as you typed them for each day.
d. When you reach Saturday (the end of that week), the next tab will take you to the next time entry row where you can enter any leave you took during the week following the instructions below.

If you are a **Positive Time** employee, follow these instructions to enter **any leave taken**:

a. Tab until you hear “Drop-down List Box dash no item selected” and “To open list, press F4” again.
b. Press the F4 key at the top of the keyboard.

c. Use the down arrow key to go through all of the choices listed in alphabetical order until you hear the type of entry you want to make, such as “Approved Leave” or “Sick Leave” for another day of the week.

   Note: You will notice that there is no code named Vacation. You would use the Approved Leave (9000) code for your vacation time. The system will then automatically deduct this time from your leave balances in the following order: Holiday Compensatory Leave, Compensatory Leave, On-call Compensatory Leave, Travel Time Compensatory Leave, Vacation Leave, Bonus Leave, and Advanced Vacation Leave (if approved).

d. Assuming that you want to choose the “Approved Leave” option first, follow the steps below to enter the number of hours you were on vacation for each day of the week.
   1. Press Tab to move to the next field and the system will leave the “Approved Leave” selection in that row header.
   2. Tab until you hear “Input field” followed by the date for the first entry you want to make for Approved Leave. To make sure that you are on the correct date, use the up arrow until you hear the date. Use the down arrow to return to the edit cell.
   3. Tab through the days and enter hours for any hours that you took Approved Leave. Use whole numbers such as 8 or include decimal points for partial hours such as 6.5.

e. When you reach Saturday (the end of that week), the next tab will take you to the next time entry row where you can enter any other leave you took during the week following the instructions below.

If you are a **Positive Time** employee, follow these instructions to enter **any additional leave taken**:

a. Tab until you hear “Drop-down List Box dash no item selected” and “To open list, press F4” again.
b. Press the F4 key at the top of the keyboard.
c. Use the down arrow key to go through all of the choices listed in alphabetical order until you hear the type of entry you want to make, such as “Approved Leave” or “Sick Leave” for another day of the week.
d. Assuming that you want to choose the “Sick Leave” option next, follow the steps below to enter the number of hours you were out sick for each day of the week.
   1. Press Tab to move to the next field and the system will leave the “Sick Leave” selection in that row header.
   2. Tab until you hear “Input field” followed by the date for the first entry you want to make for Sick Leave. To make sure that you are on the correct date, use the up arrow until you hear the date. Use the down arrow to return to the edit cell.
   3. Tab through the days and enter hours for any hours that you took Sick Leave. Use whole numbers such as 8 or include decimal points for partial hours such as 6.5.

e. When you reach Saturday (the end of that week), the next tab will take you to the next time entry row where you can enter any other leave you took during the week following the instructions above.

Creating a Template:

If you routinely enter the same type of time or leave each pay period, you have the option of saving a typical set of options such as Time Worked, Approved Leave, and Sick Leave as a template before you complete the remaining steps to review and save your entries. Then, each time you log on anywhere (home or office, for example) with your NCID, your time sheet will have the types pre-selected. To save your timesheet as a template, take the following steps:

1. Tab until you hear “Save as template link.”
2. Press Enter.
3. The system takes the cursor up to a line that reads, “Personal template has been saved,” If you do not hear this phrase, press the Insert Key and your Up Arrow to hear this confirmation statement.

Continuing to Save Your Time Sheet:

When you have entered all of your attendance and absence hours and saved as a template, you should review your time entries to make sure that they are correct before saving them:

1. Tab until you hear “Review link”.
2. Press Enter. Wait a few second while the Proceed to Review Newly Recoded Working Times screen loads. This screen contains all of your newly recorded times that you are getting ready to release to your supervisor for approval. The screen only contains the changes or new hours that you have entered so it may not include totals for the week. Following the screen layout, you will hear the date, the “time worked” label or the label for the type of leave recorded, followed by the number of hours.
3. Tab to get to first date and then tab to listen to your time and/or leave entered.
4. As you tab through the screen, if your time sheet has any errors, you will hear any error messages that you may have before you get to the first date tab. Correcting Errors: If you find an error in what you had entered or hear a system generated error message, tab to the Previous Step button to go back to the last screen to correct any mistakes following the steps outlined previously for entering time.

After you have reviewed your time entries and are ready to save your hours, follow these steps:

1. Tab until you hear “Save link”.
2. Press Enter.
3. On the next screen, Shift-Tab you will hear “Your data has been saved.”
4. Then tab until you hear “Release Working Times link” and press Enter. Wait a few seconds until the next screen loads.
5. Tab until you hear “Select All link” and press Enter.
6. Tab until you hear “Review link” and press Enter.
7. On the Release Working Time screen, you can tab through the entries to listen to all of the time you are ready to release for approval again and when you hear “Save Link,” press Enter.
8. The Release Working time screen loads again. Tab through until you hear the message “You have successfully released your working times.”
   a. When you release your time sheet, your manager will receive notice that your time sheet is ready for approval.
   b. If you submit your time, but wish to change it, you can make changes before the time sheet is approved. If your time sheet has been approved, you will need to contact your Time Administrator to make changes.

9. Use Tab to select one of the following and then press Enter to go to another function or go to Step 10 to log off.
   - Release Additional Working Times
   - Record Working Times
   - Go to My Working Time Home page
   - Go to Employee Self Service homepage
10. If you are ready to Log Off, tab or shift-tab until you hear “Log Off” and press Enter. Then press Shift Tab to hear, “Are you sure you want to log off?” and then tab until you hear, “Yes link” and press Enter.

To use your timesheet after saving it as a template, you will follow the same steps listed in the prior section, except that you will not need to use the drop-down list of time worked or leave options if you are entering your typical options already saved as a template. As you tab through the time sheet, you will hear your saved categories such as Time Worked or Approved Leave. Tab through the dates to enter your work or leave hours on each row. If you need to add another type of leave at a future date, you may add it to the timesheet by tabbing to an empty row and selecting from the list of choices. Select the leave type, enter your hours and if you do not select “Save as Template,” the additional leave category will not be automatically listed when you go back in to enter time at a later date.

Entering and Changing Your Personal Data:
Address Changes, Bank Information, Tax Withholding Information

CHANGING YOUR ADDRESS

From the BEACON home page, follow these steps:

1. Tab until you hear “My Data (ESS) this page link” and press Enter.
2. The Employee Self Service menu loads.
3. Tab until you hear “My Personal Data this page link” and press Enter.
4. Tab until you hear “Addresses link” and press Enter.
5. Tab several times until you hear “Addresses SSR slash 1” to confirm that you are out of the menu and into the addresses section of the screen. If you want to confirm that you are on the correct screen press Insert + T to hear the title that includes the phrase “Personal Data – Address.”
6. Tab several more times. You will hear “Permanent Residence” and your current address. Continue tabbing until you hear “Edit Link” and then press your Enter key.
7. The Addresses screen re-loads to allow you to make changes.
8. Tab several times. You will hear “Permanent Residence” and tab a few more times to hear your current address.
9. Press your Enter key to enter forms mode. You will hear “Forms mode on.” Press your Delete key until you hear “blk” for “blank” to verify that you have deleted the current address text.
10. Type in your new street address. Then tab to the next few fields to check the entries. If you need to make changes to your city, county, state, zip code, and telephone number, delete and then type in any changes in the same manner. Note: The state field is a drop-down box. If you are changing your state, you will hear instructions on how to access the state names and select the correct state.
11. Continue tabbing until you hear “Radio Button Checked – to change the selection, press up or down arrow” – or – you may hear “Valid from Today Radio button checked, one of two”. If you want the address change to be effective immediately, leave this button checked and tab on as described in Step 13.
12. If you want to make the address change effective on a future date, use your down arrow key until you hear “Valid as of Future Date”. Then tab until you hear “Input field for Date” and the current date. Press your Delete key until you hear “blk” for “blank” to verify that you have deleted the current date. Type in the date you want your address change to be effective using the MM/DD/YYYY format.
13. Tab until you hear “Review” and press Enter.
14. The changed address screen loads. Tab to listen to the address and the Valid From date to make sure they are correct.
    a. If you made an error, tab until you hear “Previous Step link” and press Enter. Then use your tab key or shift-tab to go through the fields and follow steps 10 through 14 to make your change.
    b. If all entries are correct, tab until you hear “Save link” and press Enter.

15. A confirmation screen loads. Press shift-tab until you hear “The changes to your address data were saved.”
16. Tab to listen to any of the links for another area within Employee Self Service or Log Off and press Enter. if (If you log off, tab or Shift-Tab until you hear “Are you sure you want to log off?” and then tab until you hear “Yes link” and press Enter.)

CHANGING YOUR DIRECT DEPOSIT INFORMATION

From the BEACON home page, follow these steps:

1. Tab until you hear “My Data (ESS) this page link” and press Enter.
2. The Employee Self Service menu loads.
3. Tab until you hear “My Personal Data this page link” and press Enter.
4. Press Up or Down Arrow until you hear “Bank Information link” and press Enter.
5. Give the bank information screen some time to load and then tab until you hear “Bank Information SSR/1” to confirm that you are now in the Bank Information section of the screen.
6. Then tab to hear your current bank payee name, bank name, and account number. Tab until you hear “Edit link” and press Enter to make changes to the Main bank where your payroll check is deposited.
    - The Bank Information edit screen loads. Tab until you hear “Bank Number Input field” and then your current bank number for your main bank. Press the Delete key and then Enter to go to forms mode. Type in your new bank’s 9-digit bank routing number. (You can obtain the routing number by calling your bank if you don’t have it.)
    - Tab until you hear “Account Number Input field” and then your current account number for your main bank. Press the Delete key and then Type in your new account number.
    - Tab until you hear “Checking Radio button checked – to change selection press up or down arrow”. If you want to change to a checking or savings account, use the down arrow key until you hear “Checking or Savings Radio Button selected”.
    - Continue tabbing until you hear “Radio Button Checked – to change the selection, press up or down arrow” – or – you may hear “Valid from Today Radio button checked, one of two”. Because all direct deposits must be effective the first day of the pay period (first day of the month if you are paid monthly), go to the next step to change the effective date unless you happen to be making this change on the first day of your pay period.
    - To make the direct deposit effective on a future date, use your down arrow key until you hear “Valid as of Future Date”. Then tab until you hear “Input field for Date” and the current date. Press your Delete key until you hear “blk” for “blank” to verify that you have deleted the current date. Type in the date you want your direct deposit change to be effective using the MM/DD/YYYY format.
    - Tab until you hear “Review” and press Enter.

- The changed Bank Information screen loads. Tab to listen to the changed bank information and the Valid From date to make sure they are correct.
- If you made an error, Tab until you hear “Previous Step link” and press Enter. Then use your Tab key or Shift-Tab to go through the fields and follow the steps above to make your change.
- If all entries are correct, tab until you hear “Save link” and press Enter.
- A confirmation screen loads. Press Tab or Shift-Tab until you hear “The changes to your bank data were saved.”

7. If you want to add another bank to divide your direct deposit into more than one bank instead, tab until you hear “Go to Bank Information Overview”.
    - Tab until you hear “New Other Bank link” and press Enter.
    - Follow the previous steps to enter in the new other bank information.
    - As you continue to tab after entering the bank number and account number, you will hear Standard Percentage input field 0. If you want to designate a certain percentage of your pay check to go to this account, type the percentage such as 20 for 20% or 10 for 10%. If you would rather specify a certain monetary amount, leave the Standard Percentage field set to 0 and tab until you hear Default Value input field 0. Enter in your amount such as 200 for $200.00 or 1000 for $1000.00.
    - Then follow the previous review and save steps to complete adding a new bank through the review and save steps.
    - Then Tab to go to any of the links for another area within Employee Self Service or select Log Off and press Enter if you are ready to exit ESS. (If you log off, Tab or Shift-Tab until you hear “Are you sure you want to log off?” Then Tab until you hear “Yes link” and press Enter.)

VIEWING OR PRINTING YOUR PAY STATEMENT

From the BEACON home page, follow these steps:

1. Tab until you hear “My Pay link”.
2. Press Enter.
3. Tab until you hear “Pay Statement link”.
4. Press Enter.
    - If you want to access another pay statement, press Tab until you hear “Previous Salary Statement” or “Next Salary Statement”.
    - Press Enter.
5. Since the statement is in PDF format, follow the JAWS reader instructions to listen to the reading of the PDF document.

VIEWING QUOTA BALANCES

From the BEACON home page, follow these steps:

1. Tab until you hear “My Time link” and press Enter.
2. Tab until you hear “Quota Overview link” and press Enter.
3. Tab through the quota table to hear your quota balances.
    - The quota table contains five columns:
        A. The Time Account column displays the time of leave.
        B. The Deductible From column displays the date from which the leave may be used.
        C. The Deductible To column displays the date to which the leave may be used.
        D. The Entitlement column displays the earned quota amounts.
        E. The Remainder column displays the quota amounts available to be used.
4. Tab to go to any of the links for another area within Employee Self Service or select Log Off and press Enter if you are ready to exit ESS. (If you log off, Tab or Shift-Tab until you hear “Are you sure you want to log off?” and then tab until you hear Yes link and press Enter.)

CHANGING YOUR TAX WITHHOLDING INFORMATION

From the BEACON home page, follow these steps:

1. Tab until you hear “My Data (ESS) this page link” and press Enter.
2. The Employee Self Service menu loads.
3. Tab until you hear “My Personal Data this page link” and press Enter.
4. Press tab until you hear “Tax Withholding Information link” and press Enter.
5. Tab until you hear “Federal” and your current selections and then “Edit link.” Press Enter.
    - This step allows you to make changes to your Federal withholding status.
6. Tab until you hear “Filing Status dash drop-down list box dash” followed by your current filing status.
    - To change your filing status:
        a. Press F4.
        b. Use the up and down arrows to find the correct filing status.
        c. Press Enter.
7. Tab until you hear “No of exemptions dash input field dash” followed by your current number of allowances.
    - To change your number of exemptions, enter the new number of exemptions or if that does not work, press Enter to enter forms mode.

8. Tab until you hear “Additional withholding dash input field dash” followed by your additional withholding amount.
    - To change your additional withholding amount, enter the new amount or if that does not work, press Enter to enter forms mode.
9. Tab until you hear “Tax Exempt Indicator dash drop-down list box dash” followed by your tax exempt status.
    - To change your tax exempt status:
        a. Press F4.
        b. Use the up and down arrows to find the correct tax exempt status.
        c. Press Enter.
10. Tab until you hear “Declaration dash checkbox dash not selected.”
11. Press the spacebar to select the Declaration checkbox.
12. Tab until you hear “Valid as of Future Date dash input field.”
    - To future date your Federal tax changes, enter the validity date in the MM/DD/YYYY format or if that does not work, press Enter to enter forms mode.
13. Tab until you hear “Review link” and press Enter.
14. Tab through your new federal tax withholding information.
    - If you need to make a correction, tab until you hear “Previous step link” and press Enter. Repeat the previous steps to update your Federal tax withholding information.
    - If the changes are correct, tab until you hear “Save link” and press Enter.
15. Tab until you hear “Go To W4 Tax Withholding Overview link” and press Enter.
16. Tab until you hear “North Carolina”. This is the data entry area for state tax withholdings.
17. Tab until you hear “Edit link” and press Enter.
    - This step allows you to make changes to your state tax withholding status.
18. Tab until you hear “Filing Status dash drop-down list box dash” followed by your current filing status.
    - To change your filing status:
        a. Press F4.
        b. Use the up and down arrows to find the correct filing status.
        c. Press Enter.
19. Tab until you hear “No of exemptions dash input field dash” followed by your current number of allowances.
    - To change your number of exemptions, enter the new number of exemptions or if that does not work, press Enter to enter forms mode.
20. Tab until you hear “Additional withholding dash input field dash” followed by your additional withholding amount.
    - To change your additional withholding amount, enter the new amount or if that does not work, press Enter to enter forms mode.

21. Tab until you hear "Tax Exempt Indicator dash drop-down list box dash" followed by your tax exempt status.
    - To change your tax exempt status:
        a. Press F4.
        b. Use the up and down arrows to find the correct tax exempt status.
        c. Press Enter.
22. Tab until you hear "Declaration dash checkbox dash not selected."
23. Tab until you hear "Valid as of Future Date dash input field."
    - To future date your Federal tax changes, enter the validity date in the MM/DD/YYYY format or if that does not work, press Enter to enter forms mode.
24. Tab until you hear "Review link" and press Enter.
25. Tab through your new state tax withholding information.
    - If you need to make a correction, tab until you hear "Previous step link" and press Enter. Repeat the previous steps to update your state tax withholding information.
    - If the changes are correct, tab until you hear "Save link" and press Enter.
26. Tab until you hear "Go To W4 Tax Withholding Overview link" and press Enter.
27. Tab to go to any of the links for another area within Employee Self Service or select Log Off and press Enter if you are ready to exit ESS. (If you log off, Tab or Shift-Tab until you hear "Are you sure you want to log off?" Then Tab until you hear "Yes link" and press Enter.)

GETTING HELP

To contact BEST Shared Services:

- In the Raleigh area, call 919-707-0707
- Statewide, call 866-622-3784
- Email BEST Shared Services at best@osc.nc.gov
- Web Site: http://www.osc.nc.gov/BEST