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Employee Self-Service in My.Fordham

Purpose

This document is intended to provide an introduction to Employee Self Service in My.Fordham. Employee Self-Service in My.Fordham is a tool that enables the employees of Fordham University to access certain areas of their records through a secured portal that is validated through a User ID and Password. Employees can view changes to their records from home or the office on a 24/7 basis. This eliminates the need to contact the Human Resources office during business hours to request an update.

What is Banner and My.Fordham?

Banner is a suite of integrated software systems designed for managing colleges and other institutions. Banner is an Enterprise Resource Planning (ERP) system, which is a single solution to Fordham’s Human Resources, Finance, Enrollment and Advancement systems.

Banner itself is divided into two parts: Internet Native Banner (INB) which includes administrative and other functions used to change or maintain Banner, and Self Service Banner (SSB) which is the version that is accessible through My.Fordham.

My.Fordham is the gateway to Fordham’s online services for students, faculty, staff and alumni. Bookmarks, calendar, an online directory, campus announcements, an email interface, academic course and enrollment tools for faculty, discussion groups, registration, financial aid, bill payment and academic course information are all located inside My.Fordham.

Logging into My.Fordham

In order to log into My.Fordham, follow these steps:

1. Go to my.fordham.edu
2. In the Secure Access Login area, type in your AccessIT ID and Password.
3. Click Login.
Note: If you do not know your AccessIT user account and password, please contact the University Help Desk at (718) 817-3999 or via email to: helpdesk@fordham.edu for assistance.

4. Once you have logged into My.Fordham, select the Employee Tab and you should see a screen similar to the one below:

5. On the Employee Tab, in the Banner Self-Service channel, click Employee folder and then select the link of the information you want to view. You will be navigated to respective pages in Employee Self-Service.
Benefits and Deductions

The following functions enable employees to view their benefit and deduction information.

- Benefits and Deductions
  - Retirement Plans
  - Health Benefits
  - Flexible Spending Accounts
  - Miscellaneous
  - Open Enrollment
  - Beneficiaries and Dependents
  - Benefit Statement

Retirement Plans

The Retirement Plans page displays data for each benefit plan. The employer and employee contribution information is specified for each benefit plan.

The following links are displayed for retirement plan functions:

- History – Displays the history of changes for the deduction.
- Contributions or Deductions – Displays the employee and employee contributions for the time frame specified for the deduction.
- Add a New Benefit or Deduction – This function is not allowed.

STEPS
1. From the Benefits and Deductions menu, select Retirement Plans.
2. View the information.
3. Select the History or the Contributions or Deductions option.
4. View the information.

Retirement Plans

Select Add a New Benefit or Deduction to add a new benefit.

TIAA-CREF Basic Retirement Plan
Benefit or Deduction as of date: Nov 10, 2010
Status of Benefit or Deduction: Active
Start Date: Jul 01, 2010
End Date:
Employee Percentage: 5.00
Employer Percentage: 10.00
Employee Annual Limit: 
Employer Annual Limit: 

History | Contributions or Deductions | Vendor Web Site
Health Benefits
The Health Benefits page displays data for each benefit plan. The employer and employee contribution information is specified for each benefit plan.

The following links are displayed for health benefits functions:

- History – Displays the history of changes for the deduction.
- Contributions or Deductions – Displays the employee and employee contributions for the time frame specified for the deduction.
- Add a New Benefit – This function is not allowed.

**STEPS**
1. From the Benefits and Deductions menu, select Health Benefits.
2. View the information.
3. Select the History or the Contributions or Deductions option.
4. View the information.

Flexible Spending Accounts
The Flexible Spending Accounts page displays data for each flexible spending account. The amounts to be deducted each pay period and for the whole year are included.

The following links are displayed for flexible spending account functions:

- History – Displays the history of the deduction.
- Add a New Spending Account – This function is not allowed.

**STEPS**
1. From the Benefits and Deductions menu, select Flexible Spending Accounts.
2. View the information.
3. Select the History option.
4. View the information.
Flexible Spending Accounts

Select Add a New Spending Account to add a new flexible spending account.

Flexible Spending - Healthcare - HCA
Benefit or Deduction as of date: Nov 10, 2010
Status of Benefit or Deduction: Active
Start Date: Jul 01, 2010
End Date: 
Employee Amount: 100.00
Annual Goal Amount: 2,600.00

Miscellaneous
The Miscellaneous page displays data concerning miscellaneous benefits or deductions.

The following links are displayed for miscellaneous functions:

- History – Displays the history of the deduction.
- Contributions or Deductions – Displays the employee and employee contributions for the time frame specified.
- Add a New Benefit or Deduction – This function is not allowed.

STEPS
1. From the Benefits and Deductions menu, select Miscellaneous.
2. View the information.
3. Select the History or the Contributions or Deductions option.
4. View the information.

Miscellaneous

Select Add a New Benefit or Deduction to add a new record.

Accidental Death/Dismemberment-EE
Benefit or Deduction as of date: Nov 10, 2010
Status of Benefit or Deduction: Active
Start Date: Jul 01, 2010
End Date:
Plan: 26 Pays
EE/ER In: 1
Coverage Amount Override: 
Calculated Premium: 
Calculated Insurance Salary: 
Calculated Coverage Amount: 

History | Contributions or Deductions
**Benefit Statement**  
The online employee **Benefit Statement** merges all related benefits information into a single online benefit statement.

1. From the **Benefits and Deductions** menu, select **Benefits Statement**.
2. Press the **Select** option to view your benefits statement.
3. Press the **Select** option after entering the date criteria.
4. View the benefit statement.

**NOTE:** Use the vertical scroll bar to view all of the statement information.

---

**Benefit Statement Date Criteria**

1. **As of date:** [CURRENT]  
   Enter date: [MM/DD/YYYY]  
   Select | New ID

---

**Benefit Summary**

**Statement for Jorge Oubre as of Nov 10, 2010**  
**Current Date is Nov 10, 2010**  

**Personal Data**
- **Department:** Vice President-Information Technolo  
- **Benefit Category:** Administrator  
- **Date of Birth:** Aug 01, 1989  
- **Original Hire Date:** Aug 26, 2009  
- **Current Hire Date:** Aug 26, 2009  
- **Adjusted Service Date:** Aug 26, 2009

**Miscellaneous**

**ETRAC Pre-Tax Deduction**
- **Employee Amount:** $100.00

**Lombardi Fee**
- **Employee Amount:** $10.00
- **Annual Limit:** $200.00

**Parking**

- **Employee Amount:** $45.00

[Links to: Donations | Flex Spending Accounts | Health Insurance | Life Insurance | Long Term Disability | Miscellaneous | Parking | Retirement Plans | Taxes]
Pay Information

The Pay Information function enables employees to view their payroll data.

Pay Information
- Direct Deposit Allocation
- Earnings History
- Pay Stub
- Deductions History

Direct Deposit Allocation

The Direct Deposit Allocation page displays a list showing how your direct deposit pay is distributed.

The following is listed for each:

- Bank or credit union into which the money is deposited
- Amount or percentage deposited per pay into that bank or credit union
- Type of account into which the money is placed

STEPS

1. Select Direct Deposit Allocation from the Pay Information menu.
2. View your direct deposit information.

Direct Deposit Allocation

The following accounts are listed in the order in which your pay will be distributed.

- There are no payroll records with direct deposit information.

<table>
<thead>
<tr>
<th>Proposed Pay Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bank Name</td>
</tr>
<tr>
<td>FEDERAL RESERVE BANK OF BOSTON</td>
</tr>
</tbody>
</table>

NOTE: A message will display if you do not have any direct deposits.
Earnings History

The Earnings History option allows you to view your earnings data.

STEPS
1. From the Pay Information menu, select Earnings History.
2. Enter the date information and select the Display option.
3. View your earnings history.
4. Click the type of pay to view the detail of your earnings.

Pay Stub

The Pay Stub page allows you to view your general pay information for a particular year and see detailed data for a particular pay period.

STEPS
1. From the Pay Information menu, select Pay Stub.
2. Select the year from the drop down menu.
3. Click Display.
4. View your pay information.
5. Click a particular pay stub date to view the detail.
Deductions History
The Deductions History page allows you to view deduction information for a range you specify.

STEPS
1. From the Pay Information menu, select Deductions History.
2. Enter the date range.
3. Click Display.
4. View your deductions information.
5. Click a Deduction Type to view the detail.
### Deductions History

Choose the From and To date range and then select Display.

**From Date:** January 2010  
**To Date:** November 2010

---

#### Deductions Summary

Select a deduction to access history information.

**Deduction History from January 2010 to November 2010**

<table>
<thead>
<tr>
<th>Deduction Type</th>
<th>Employee Deduction</th>
<th>Employer Deduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accidental Death/Dismemberment-EE</td>
<td>.65</td>
<td>.00</td>
</tr>
<tr>
<td>Aetna Option</td>
<td>138.42</td>
<td>784.32</td>
</tr>
<tr>
<td>ETRAC Pre-Tax Deduction</td>
<td>200.00</td>
<td>.00</td>
</tr>
<tr>
<td>FICA Tax</td>
<td>652.73</td>
<td>652.73</td>
</tr>
<tr>
<td>Federal Tax Withholding</td>
<td>2,845.21</td>
<td>.00</td>
</tr>
<tr>
<td>Flexible Spending - Healthcare - HCA</td>
<td>300.00</td>
<td>.00</td>
</tr>
<tr>
<td>Imputed Life</td>
<td>.00</td>
<td>.00</td>
</tr>
<tr>
<td>Life Insurance - Employee</td>
<td>5.93</td>
<td>.00</td>
</tr>
<tr>
<td>Life and ADD Insurance - ER</td>
<td>.00</td>
<td>197.33</td>
</tr>
<tr>
<td>Lombardini Fee</td>
<td>30.00</td>
<td>.00</td>
</tr>
<tr>
<td>Long Term Disability</td>
<td>.00</td>
<td>243.36</td>
</tr>
<tr>
<td>Medicare Tax</td>
<td>199.43</td>
<td>199.43</td>
</tr>
<tr>
<td>Metro Commuter Tax</td>
<td>.00</td>
<td>.48</td>
</tr>
<tr>
<td>New York State Withholding</td>
<td>808.96</td>
<td>.00</td>
</tr>
<tr>
<td>Parking</td>
<td>45.00</td>
<td>.00</td>
</tr>
</tbody>
</table>

**Contributions or Deductions**

Choose new dates to change the date range and select Display.

**Aetna Option**

**History Start Date:** January 2010  
**History End Date:** November 2010

<table>
<thead>
<tr>
<th>Year Month</th>
<th>Personal Deduction</th>
<th>Employer Contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010 January</td>
<td>.00</td>
<td>.00</td>
</tr>
<tr>
<td>February</td>
<td>.00</td>
<td>.00</td>
</tr>
<tr>
<td>March</td>
<td>.00</td>
<td>.00</td>
</tr>
<tr>
<td>April</td>
<td>.00</td>
<td>.00</td>
</tr>
<tr>
<td>May</td>
<td>.00</td>
<td>.00</td>
</tr>
<tr>
<td>June</td>
<td>.00</td>
<td>.00</td>
</tr>
<tr>
<td>July</td>
<td>92.28</td>
<td>522.58</td>
</tr>
<tr>
<td>August</td>
<td>461.14</td>
<td>261.44</td>
</tr>
<tr>
<td>September</td>
<td>.00</td>
<td>.00</td>
</tr>
<tr>
<td>October</td>
<td>.00</td>
<td>.00</td>
</tr>
<tr>
<td>November</td>
<td>.00</td>
<td>.00</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>138.42</td>
<td>784.32</td>
</tr>
</tbody>
</table>
Tax Forms

The **Tax Forms** page gives you access to view your W4 Exemptions or Allowances and your year-end tax statements.

- **W4 Tax Exemptions or Allowances**
- **Electronic W-2 Consent**
- **W-2 Wage and Tax Statement**
- **W-2c Corrected Wage and Tax Statement**

**W4 Tax Exemptions or Allowances**
The **W4 Tax Exemptions** page displays your W-4 Information as of today's date.

**STEPS**
1. From the Tax Forms menu, select **W4 Tax Exemptions**.
2. View your tax information.

**W4 Tax Exemptions or Allowances**

---

*Federal Tax Withholding*

- **As of Date:** Nov 10, 2010
- **Status:** Active
- **Start Date:** Jul 01, 2010
- **End Date:**
- **Filing Status:** Single
- **Number of Allowances:** 0
- **Additional Withholding:** .00

---

**W-2 Wage and Tax Statement**
The **W-2 Year End Earnings Statement** page allows you to access your W2 Statement (for US employees) for a specified year. The status and date at the top of the page lets you know if this is an Original issue W-2 or a Reissued W-2 along with the date it was created. You can use your browser and the Print button to print the W-2.

**STEPS**
1. Select **W2 Wage and Tax Statement** from the Tax Forms menu.
2. Select the **Tax Year** for which you wish to review the W-2 statement.
3. Select your **Employer** or **Institution** from the corresponding pull-down list.
4. Click the **Display** button.
5. Select the **Print** button.
6. Select the Print option from the File menu of your web browser.

**NOTE:** If no W2 statements are available, a message will display.
W-2c Corrected Wage and Tax Statement
If your information provided by your institution to the government has been changed after it was
submitted to the IRS, you can print a corrected W-2c Wage and Tax Statement. The Status field on
the W-2 states it is reissued and the As of Date field displays the reissue date.

STEPS
1. Select W-2c Corrected Wage and Tax Statement from the Tax Forms menu.
2. Select the Tax Year for which you wish to review the W-2 statement.
3. Select your Employer or Institution from the corresponding pull-down list.
4. Click the Display button.
5. Select the Print button.
6. Select the Print option from the File menu of your web browser.

Jobs Summary
The Jobs Summary option allows you to access jobs information.

Jobs Summary

STEPS
1. Select Jobs Summary from the Employee Services menu.
2. View your job summary information.
3. Click the job title to view the details of that job.

Jobs Summary

List of Jobs
<table>
<thead>
<tr>
<th>Title</th>
<th>Begin Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associate Registrar</td>
<td>Jan 01, 2010</td>
<td></td>
</tr>
<tr>
<td>University RH Student Worker</td>
<td>Jan 01, 2010</td>
<td></td>
</tr>
<tr>
<td>Ram Van RH Student Worker</td>
<td>Jan 01, 2010</td>
<td></td>
</tr>
</tbody>
</table>

Job Detail

Changes to Your Job
<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Status</th>
<th>Job Title</th>
<th>Department Name</th>
<th>Reason for Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan 01, 2010</td>
<td>Active</td>
<td>Associate Registrar</td>
<td>Vice President-Information Technology</td>
<td></td>
</tr>
</tbody>
</table>
**Leave Balances**

The **Leave Balances** option allows you to access your leave balance information. Leave information will only display for Maintenance and Clerical Employees.

![Leave Balances]

**STEPS**

1. Select **Leave Balances** from the Employee Services menu.
2. View your leave balance information.

**Banner Help Guides and Aids**

The Banner Help Guides and Aids channel links directly to the Banner Quick Reference Site. This site contains helpful information on the Banner Information system, including Fordham – specific documentation.