



ESS Portal – Employee Guide

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How to set up your portal

As a new employee with Consumer Directions Inc, you will receive an email to set up logins for our Employee Self-Service (ESS) Portal that will allow you to verify information accuracy within our system, check Paid Time Off (PTO) balances, review pay history, and print/save paystubs for your needs.

Along with the PIN you are emailed to get started, you will also need the following to get registered:

- Employee ID
- Last 4 of SSN
- Zip code (needs to be the one on file with us)

When you are ready to register and login, you will need to choose Consumer Direction Inc (CDI) from drop down menu. If you work with Consumer Directions only, you will choose Consumer Directions Inc. every time. Once the company is selected, you will click create new user.

- Helpful hint: if you hover over a section, it will list the requirements needed for that field. Example: length and character requirements for password creation.
- If you work for multiple employers, you will receive a new pin for each new employer. You will need to create a unique account for each employer.
- Each login you create will require you to have different usernames. They cannot be the same.

Other Information

Once logged in, you will see 3 choices to select at the top:

- **Home:** This will bring you to the main screen that you see at initial login.
- **Employee:** Any information the system holds that can be reviewed and used. Hover over employee and you will see the following options to be viewed:
 - Personal information
 - Features (earnings, taxes, deductions)
 - Check history (payments)
 - Feature hours
 - Calculators- helpful tools for personal use such as if buying or leasing a vehicle.
 - Websites- helpful sites that you as the employee could use with a hyper link directly to that site.
 - W-2's: This will not be available on the portal to view for tax reporting. They will continue to be mailed directly using the address on file.
- **E-mail HR:** This function is not being used at this time to report anything to our HR department. Please continue to contact your FMS specialist or HR directly for any updates to information needed.

Personal information:

Your personal information is the information you provided when you completed your new hire packet such as address, email, phone, birth date, and hire date. *If anything appears incorrect, please connect with your FMS Specialist to update this or HR directly.*

ESS Portal Features and How to Access Each Feature

Within the features section, there are 4 features you can review in the ESS portal:

Earnings

- a. **ERD EX (Your Payrate):** When you click the ERD feature, this will show your current payrate:

- Employee Features
 - Earnings
 - ERD EX
 - Bonus
 - PTO EX
 - PTO Accrual
 - Tax Deductions
 - Other Deductions

ERD EX	
Base Rate:	\$20.00
x Multiplier:	1.00
= Default Rate:	\$20.00
Hourly Rate Override: \$0.00	

How to find your PTO Balance:

Under Employee features click on PTO Accrual (screen shot below on left)

Accrued Balance (in Hours): will be the number of hours you have in PTO to be used. (Screen shot below Right).

- Employee Features
 - Earnings
 - ERD EX
 - Bonus
 - PTO EX
 - PTO Accrual
 - Tax Deductions
 - Other Deductions

PTO Accrual	
Accrued Balance (in Hours):	6.5910
Accrued Balance (in Days):	0.8239
Accrued Days per Year:	1.0000
Accrued on Last Check (Hours):	2.0248

Tax Deductions

You can review what is being claimed for State and Federal taxes by clicking on the tax line to look at them. This will not tell the amount being withheld each paycheck, but what you completed for each based on your completed W-4 paperwork.

- Employee Features
 - Earnings
 - Tax Deductions
 - Federal Income Tax
 - State Income Tax
 - Other Deductions

Federal Income Tax	
Filing Status:	Single
Exemptions:	0
Additional Withholding:	\$150.00
Supplemental Wage Percentage:	0%
2020 Form W4	
Step 2 - Only Two Jobs Total:	No
Dependent Claimed Total:	\$6,000.00
Other Income Amount:	\$0.00
Deductions Amount:	\$0.00

Other Deductions

This will show any deductions that may come off your paycheck that have been set up by HR or accounting. This will also show if you are being paid direct deposit and to what account.

- **DD:** This section shows your direct deposit information. Once clicked on, this will show the percent going into the account shown and account information for verification. If DD is not listed under other deductions, you were paid via paper check.

Employee Features

- Employee Features
 - Earnings
 - Tax Deductions
 - Other Deductions
 - [DD1](#)

DD1

System Calculation
Percent of Net Earnings: 100%

Account Information
Type:
Routing:
Account:

(Check History) Pay History

This section is where you can obtain your bi-weekly pay stubs for review and personal use. Your most recent payment will be on top. Click Print/View to open the document and will appear as a download on the top right of your screen. Once clicked, it will open in another window.

Consumer Directions, Inc. (Fiscal Agent) Monday, March 11, 2024 12:00 PM

Home Employee E-mail HR

User Info You are logged in as: [Redacted] Logout Change Password

Check History

Check #	Check Date	Amount	
15754	3/1/2024	\$1,264.00	View/Print
12621	2/16/2024	\$1,051.00	View/Print
9484	2/2/2024	\$1,195.00	View/Print
6334	1/19/2024	\$1,223.00	View/Print
2968	1/5/2024	\$1,413.00	View/Print

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