Employee Portal Registration Info

1. Portal registration looks at the Employee record(s) for matching data, including a check to ensure that only active (or paid) employees are allowed to register. An "active employee" is determined by the Employment Status field in the Employee record. The definition of the Employment Status includes two flags: Active Employees and Employees Only. These flags are set for each Employment Status defined in the Setup-Employment-Employment Status activity. A "paid employee" is determined by the employee having been paid some positive amount of Fit gross, SIT Gross and Medicare Gross.

Portal access is granted based on validation of the follwing information from the Employee Record:

- Work Email
- First Name
- Last Name
- Date of Birth
- SS # last 4 digits

Once a match is made and access is granted, the login process no longer validates <u>the email address</u>. In other words, changes made to email addresses in the employee record will not affect the ability of the employee to login to the employee portal

2. Once employee has successffully logged into the employee portal
   - The employee can change email address. The new email address will become Username and an option to send confirmation key to
   - The employee can change their username. The new user name wil be the Username (overrides email address username)

3. Under the following situations employees will be required to enter a confirmation key. The confirmation key will be sent to the email address indicated in the *Work Email* address field located in the Employee Contact section of the Employment tab. Employees with a cell phone number in the *Work Cell Phone* field will have a option to receive the confirmation key via text. *Generally these whould be employees with an employer paid cell phone.

   - Registering as a new user
   - Using the *Forgot your username or password* link
   - Accessing the portal on a new device and/or IP address
   - Employee portal accounts that have not been accessed within 35 days

Employee Portal Registration Instructions

A. Enter the following employee portal link in the address bar of a web browser
   https://shastaportal.xcoe.online/

B. **Create an internet favorite or bookmark the employee portal sign-in page for future access**

C. On the Sign-in page, click the ***Register as a new user?*** link located at the bottom of the page

Please Sign-in

Username   Enter your usemame or email address here

Password

Sign-in   Exit

Forgot your username or password?
Register as a new user?

D. Complete the following fields of the screenshot pictured below

The information entered is validated against your employee management record
1. Email Address: enter your work email address
2. First Name: enter your first name <u>as it appears on your paycheck</u>
3. Last Name: enter your last name <u>as it appears on your paycheck</u>
4. Date of Birth: enter your date of birth. Include the forward slashes (mm/dd/yyyy)
5. SS # last 4 digits: enter the last four digits of your SSN

The Password is created by the employee
6. Password: choose a password that is a minimum of 8 characters
7. Confirm Password: enter password again
8. Press Submit button

New User Registration

Email Address	Enter your email address here
First Name	This field is required.
Last Name	This field is required.
Date of Birth	This field is required. mm/dd/yyyy
SS # last 4 digits	
Password	
Confirm Password	

Submit   Cancel

If Submit button is disabled after completing the fields above, verify that your First and Last Name are entered as they appear on your paycheck and Date of Birth has been entered in mm/dd/yyy y format

E. Once your entries have been validated against you employee management record, you will be prompted to enter a Confirmation Key. *The confirmation key is sent to your work email address.*

<div align="center">

Example Email

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From: Escape Notifications Subject: Employee Online Portal: New User Registration Confirmation Your Username is: example@shastacoe.org You must enter this confirmation key within the next 5 minutes. Confirm key: qpvkyqvi

F. Enter (or copy and paste) the confirmation key provided in the email in the *Confirmation Key* field in the *Confirm User Setup Change* window pictured below and press the Submit button
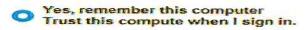
Confirm User Setup Change

Your Username and Confirmation Key were emailed to you. Enter Confirmation Key within 5 minutes

Confirmation Key

Submit   Cancel

G. Enter your Username, Password and press the Sign-in button

Please Sign-in

Username   Enter your email address here

Password

                                                    Exit

Forgot your password?
Register as a new user?

H. Once logged in, navigate the portal via the **My Activities** menu at the upper left corner

To eliminate entering an authentication code each time you sign-in to the employee protal select *Yes, remember this computer when logging in from a computer/device you trust.* Employees with a cell phone number in their employee management record will have an option to send the confirmation key to their cell phone or email address.

Would you like to remember this computer?

O Yes, remember this computer
Trust this compute when I sign in.

No, don't remember this computer.
Request a code each time I sign in.
Suggested for shared/public computers.

For assistance with setting up your employee portal account contact Diane Baxter @ 722-1709