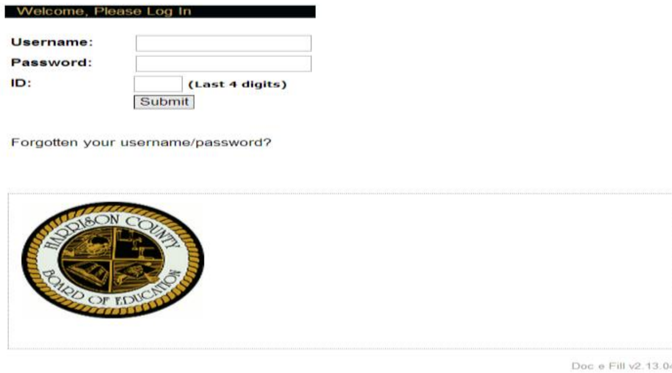
DOC E FILL INSTRUCTIONS FOR FORMS

TO SIGN IN – GO TO THE FOLLOWING LINK: https://docefill.harr.k12.wv.us



User name = FirstName.LastName (example = MARY.SMITH) - *this is **not** case sensitive*

Password (if this is your first time) = FIRSTNAME.LASTNAME1234 (example MARY.SMITH1234)
(The 1234 is the last 4 digits of your employee ID) – *the password **is case sensitive***

ID = The last 4 digits of your employee ID (example - Mary Smith's ID is 933001234 so ID= 1234)

Note: There may be captcha letters that you need to type to complete the sign in process. These are case sensitive and you DO NOT put a space between the two words that are listed. See example to the right.

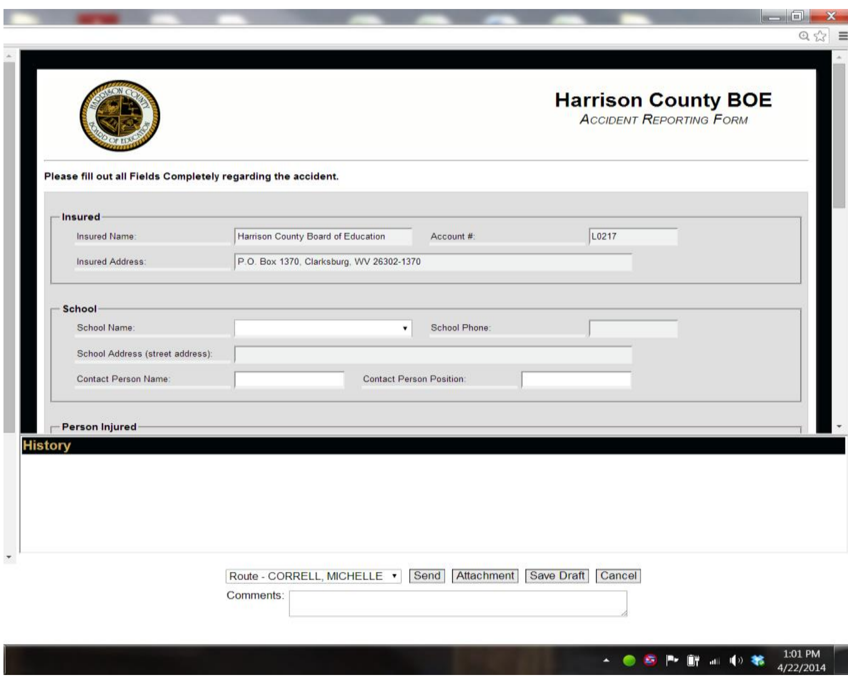
This is list of menu icons (located on the home page) that will help you navigate through the software. Click on the icon in the **upper left corner** of the screen for the items to appear.

Icon	Function	Description
	Library	List of all documents available to you for origination **(forms to be completed)**
	Drafts	**Documents you have saved** for later editing (if you start a form and save the draft, you may complete it at a later time)
	Received	**Documents sent to you from other** users in the system
	Submitted	Documents **originated by you** and sent to others in the system
	Completed	Documents archived for future referencing (**principals – student accident report**)
	Softdocs on Demand	Access to personal documents from Doc e Scan (where you **view your personnel and payroll information**)
	Change Settings	Allows **changing of password**, archive settings, email settings, report settings, and **location**
	Print	Allows you to print a document
	Help	Opens the **user manual** in a new window
	Reports	List of all available reports

This is the library that has the forms that you can submit. Click on this icon on the top left hand corner of your screen so that the forms will be displayed down the left side column of the screen. Click on the form you wish to complete and submit.

A list of forms currently available is as follows. *You may or may not have these forms as described below. If you feel that you don't have the correct menu, please contact Sharon Haddix (shaddix@access.k12.wv.us).*

- **Accident Report form** (all employees)
  - This form is very similar to the paper copy that is currently being used to report student/visitor accidents to BRIM. The person originating the form must complete the necessary information and route it to the school secretary. (It will route to Steve Casto if you are in the county office, maintenance or transportation departments.) This person should appear in the "route to" box as illustrated below. You may type comments in the comment box, but they will not go to BRIM. They are internal comments that you may include for the secretary or principal. Click on send and it will be sent to the secretary as selected.

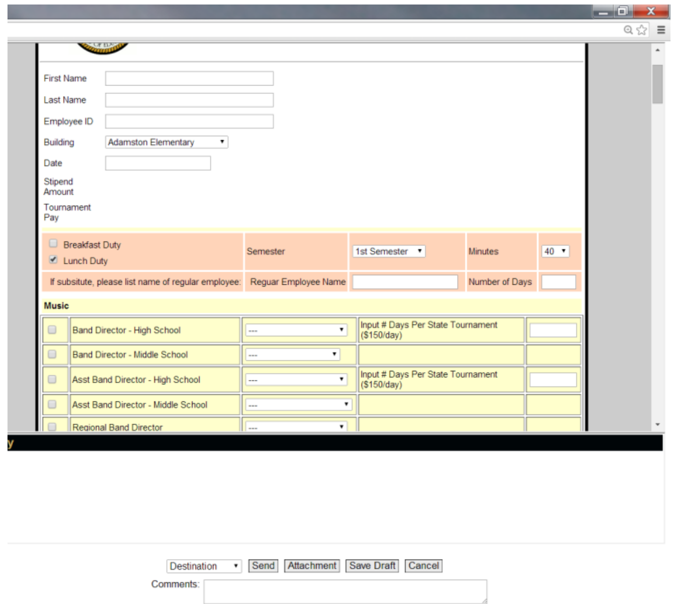


You may scroll down the form by dragging the gray bar

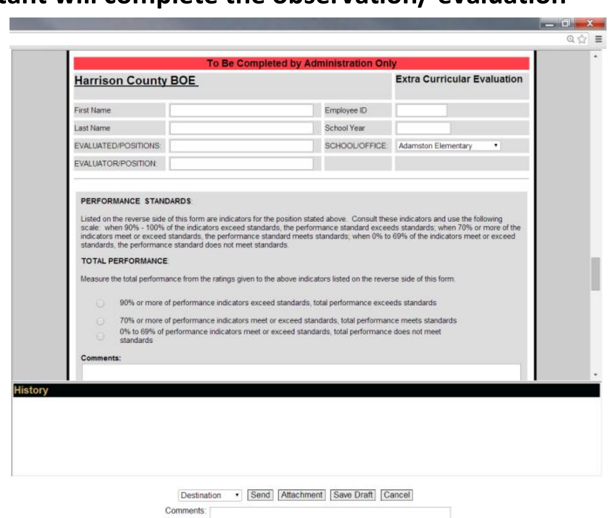
  - The selected secretary will make sure all student information is completed and will forward to the principal. **The principal will archive the form**. By selecting archive and clicking on send, the principal will be submitting the copy to BRIM and a copy will be automatically emailed to Ken Winkie and Steve Casto.
    - Principals will have access to completed copies of these forms in the completed file after it has been archived.
  - If an employee is completing this form for an accident that is not at his school location (i.e. coaching at another school), the employee must change his location prior to completing the form by selecting the key icon.

- **AP Approval form** (select employees) – already being used for accounts payable processing.

- **Extra-Curricular Payment Form** (all employees) –
    - The extra-curricular request for payment will also include applicable observations and evaluations to be completed by the principal/assistant principal. **This form will originate with the employee and will be submitted to the applicable principal/ assistant for approval.** The employee is to check the applicable request for payment (i.e. lunch duty 40 minutes) within the body of the form and then "route" by clicking on the "route box" (at the bottom) and selecting the appropriate administrator (shown as destination in the example) and clicking send. Any comments that are typed at the bottom of the screen will remain with the form and will be viewed by anyone, including the employee with access to the form. The name and ID will be pre-populated and must originate with the employee. **A separate request must be completed for each extra curricular position.**



    - The principal/assistant principal will receive an email notification that a request is pending. **The principal and/or assistant will complete the observation/ evaluation section at the bottom of the request form as required and route to Sharon Harris**. She will check to make sure the contract is on file and the paper observations and the electronic evaluation is complete. If all is correct, it will be forwarded to the finance department for payment. Ms. Harris will also keep track of the requests so that duplicate payments are not processed. If something is amiss, it will be sent back to the principal for correction (and may delay payment until it is corrected). Paper requests will not be processed. **Employees will be able to see the observations/ evaluations in the appropriate folder in the file icon after it has been archived by payroll.** 

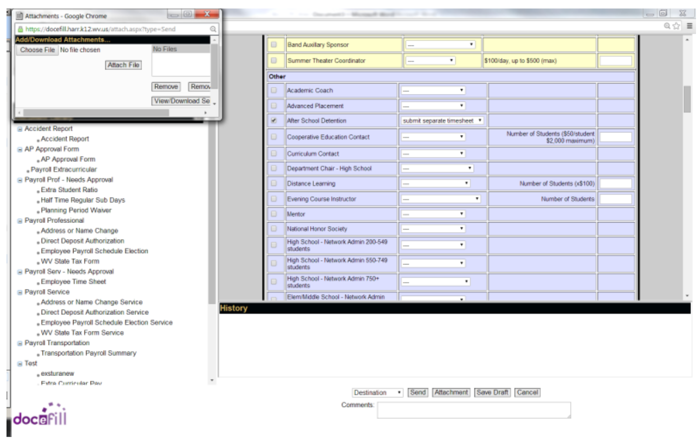


- If an employee is assigned to work at one location and their extra-curricular contract is for another location, **the employee will need to change her location to match her payment request** so that it will route to the appropriate administrator. This can be done as follows:

  Click on the  icon and select location settings. Change your location to the appropriate selection to match your payment request and click on submit. This will change your location for a single session. Proceed with completing your form. On your next login your default location will be resumed. If you do not see the location, contact the finance office so that they can correct your profile. *If you want to change your default location, then check the default box and click on submit. This will remain your location until you change it again.*

- **Substitute employees** will see all of the principals/assistant principals listed under the "route to" box. They **must select the applicable principal/administrator** for the request they are completing.

- To submit a request for payment for **after school detention**, please attach a timesheet with your total hours worked to the request for payment form.
  - To do this you click on the "attachment" button and an additional window will appear where the attachments can be added. Click the "browse" button to search for a file from the computer (you had to save a copy of the timesheet as a pdf file on your computer). Select the file and click "open".



  Click "attach file" to confirm the selection. Note – The attachment will not upload if the "attach file" button is not pressed.

- **Extra Student Ratio Form** (elementary professional employees only)
  - This form is already being used by employees as applicable. It is completed by the employee and approved by the principal and submitted to Mitzie Reider for payment. **The principal must make certain that duplicate requests are not approved for payment**. Paper requests will not be processed.

- **Half-Time Regular Sub Days** (professional employees only) – This is for half time employees that work as a substitute the other half of their workday. You must submit this to the principal/administrator of the school for which you are substituting. If you do not see this option, please contact the finance department so they can update your profile. You may "save draft" if you have already completed any part of the form so that you can resume when your profile is updated. Paper requests will not be processed.

   - If you are substituting in a school that is not your home school, you will need to change your location prior to completing this form. Click on the icon and select location settings. Change your location to the appropriate selection to match your payment request and click on submit. This will change your location for a single session. Proceed with completing your form. On your next login your default location will be resumed. If you do not see the location, contact the finance office so that they can correct your profile. *If you want to change your default location, then check the default box and click on submit. This will remain your location until you change it again.*

- **Planning Period Waiver** (professional employees only) – Complete the form as required and route to your principal. You must have board approval prior to submitting this form for approval to your principal and/or assistant principal. The finance department will not pay without board approval. Paper requests will not be processed.

- **Address or Name change** (all employees) – This form should be completed for all name and address changes. This form also lists the various web addresses (and has links to these addresses) that must also be updated with such changes. Professional employees route this form directly to Mitzie Reider and service employees to Faith Lafferty for processing. Click on send to complete process. Paper requests will not be processed.

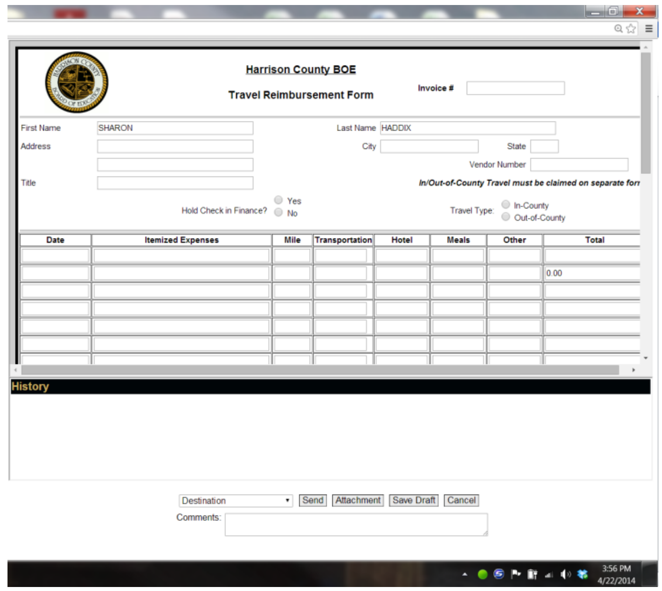
- **Direct Deposit Authorization** (all employees) – This form should be completed **if you wish to enroll or cancel direct deposit**. Check the box with the red writing if you wish to cancel. If you wish to enroll, complete the form with as many accounts as you need. The first bank name, routing, and account number will be the primary account if you select more than one account or bank to send your money. The remaining banks/accounts will require an amount to be deposited while the remainder of your paycheck will go to your primary account. Paper requests will not be processed.
   - If you would like to **attach** a copy of a voided check or deposit slip to verify the account number with your form, click on the "attachment" button and an additional window will appear where the attachments can be added. Click the "browse" button to search for a file from the computer (you had to save a copy of the check as a pdf file on your computer). Select the file and click "open". Click "attach file" to confirm the selection. Note – the attachment will not upload if the "attach file" button is not pressed.
   - If you don't know how you currently have your direct deposit set up, click on the icon and select "Direct Deposit Authorization" to view your current form on file.
   - If you want to just add to what you already have on file, list the addition and note that it is an addition to what you already have on file in the comments box. If you don't note that it is an addition to what you have, it will replace what you already have on file.

- **Employee Payroll Schedule Election** (all employees) – This is the form that allows you to annualize your pay (spread your pay over the summer if you are a 200-230 day employee). You may also complete this form If you want to not elect to annualize (cancel your summer checks). Paper requests will not be processed.

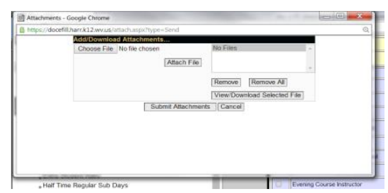
- **WV State Tax Form** (all employees) – This is the form you complete to change how you have your WV state taxes deducted from your paycheck. Select Mitzie Reider (professionals) or Faith Lafferty (service) and select the send button. Paper requests will not be processed.

- **W4 Federal Withholding Form** (all employees) – This is the form you complete to change how your federal taxes are deducted from your paycheck. Select Mitzie Reider (professionals) or Faith Lafferty (service) and select the send button. Paper requests will not be processed.

- **Travel Form** (all employees) – The form will be pre-populated with your name.



  - Complete the applicable fields similar to how you complete the paper copy. If you have receipts for hotel and other items you must attach them to the form by following the attachment directions. To **attach** a receipt(s), click on the "attachment" button and an additional window will appear where the attachments can be added. Click the "browse" button to search for a file from the computer (you had to save a copy of the receipt(s) as a pdf file on your computer). Select the file and click "open". Click on "attach file" to confirm the selection. Note – The attachment will not upload if the "attach file" button is not pressed.



  - You do not complete the invoice # field (finance use only).
  - You can select "save draft" at any time to leave the form and resume at a later time. It will be located under your saved draft folder.
  - In the drop down box below, route it to your immediate supervisor or the applicable administrator as listed in the drop down box. If you don't see the appropriate person listed, contact the finance office. The administrator will route to the next appropriate level. If it requires an account code to be added, the administrator may add the account in the comments box, or it may be forwarded to Sharon Haddix for the account code assignment.
  - Paper requests will not be processed.

Future Forms that are still being tested:

- *Employee Leave Slips (all employees)*
  - *Will be used to remit copies of doctor excuses, jury duty slips etc.*
  - *Originator will be employee or school secretary*
- *Payroll Authorization Form – (all employees)*
  - *(one of the following forms will be attached for payment – group attendance, payroll remittance, request for stipend, teacher cover planning form)*
- *Pre-K Lunch Waiver (service employees)*
- *Employee Time Sheet (service personnel only, excluding bus drivers)*