Employee Personal Page (EPP)
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Password Field Instruction
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## Latest Update Information

The following changes have been made to the Employee Personal Page (EPP) procedure:

<table>
<thead>
<tr>
<th>Section</th>
<th>Description of Change</th>
</tr>
</thead>
</table>
| **Entering and Modifying a W-4** | Modified Step 3, Claim Dependents, of the W-4, Self Service Request. The enhancement will allow employees to add other tax credits (e.g., child tax credit).
                                           | Renamed the Total qualifying children and other dependents field to Add the amounts above and enter the total here.                                                                                                    |
|                                | Updated topic image.                                                                                                                                                                                                    |
| **TSP Catch-Up Contributions**  | Updated with spillover information.                                                                                                                                                                                  |
| **Enter TSP Catch-up Contributions** | Removed topic.                                                                                                                                                                                                        |
| **TSP Spillover Contributions** | Added new topic.                                                                                                                                                                                                       |
| **Preferences**                | Removed Change W-2 Password option.                                                                                                                                                                                  |
|                                | Removed Change Paperless E&L option.                                                                                                                                                                                  |
|                                | Updated image.                                                                                                                                                                                                          |
Accessibility for Users of Assistive Technology

The National Finance Center (NFC) is committed to providing applications that may be used with assistive technology.

To meet this commitment, NFC will comply with the requirements of the United States Access Board.

NFC must ensure that users with disabilities be provided with access to have the same options within an application as those with no disability, unless an undue burden would be imposed upon NFC.

Help for Users of Assistive Technology

Online help utilizes HyperText Markup Language (HTML) frames which display help in a separate browser. Each Help page contains a Table of Contents with links and Help content. Some Help topics include one or more Related Topics.

Navigation with Keyboard Shortcuts/Commands

- To move forward from link to link or to interactive elements, select the Tab key.
- To move backward from link to link or to interactive elements, select the Shift + Tab keys.
- To select hyperlinks, select the Enter key.
- To select buttons, select the Enter key.
- To navigate and select radio buttons, select the Up and Down Arrow keys.
- To select and deselect check boxes, press the Space bar.
- To navigate and select options from a selection box, select the Up and Down Arrow keys.

Contact Information for Users of Assistive Technology

If you experience an issue due to accessibility as defined by the United States Access Board, please contact your Agency Servicing Personnel Office for assistance. Authorized Agency Contacts (AACs) listed in Table Management System (TMGT) Table 063, Department/Agency/Bureau Contact, Contact Type 04, should call the NFC Contact Center at 1-855-NFC-4GOV (1-855-632-4468). When contacting the applicable person, please include all information regarding the function that you are trying to use within the application.
Getting Started in EPP

This section includes the following topics:

- Signing Up for EPP ................................................................. 5
- Logging in to EPP for the First Time ...................................... 8
- Registering Your Two-Step Authentication ............................ 19
- Logging In ............................................................................. 29
- Login Instructions Using eAuthentication ............................. 33
- Exiting EPP .......................................................................... 38

Signing Up for EPP

This topic has been updated to include the new EPP Landing page.

The New User Sign Up option allows employees of Agencies serviced by NFC to sign up for EPP.

If you received a “Welcome to EPP” email at your Agency work email address with a temporary password and instructions for accessing EPP, then your Agency has already established you in EPP. If you did not receive a "Welcome to EPP" email at your Agency work email address, but do have a valid work email address (e.g., john.doe@usda.gov) you must complete the signup process in EPP.
To Sign Up for EPP:


![Figure 1: New EPP Warning Page](image-url)
2. Select the I Agree button. The My Employee Personal Page login page is displayed.

Figure 2: EPP Launch Pad Page
Note: To obtain help on the My EPP login page, select the Need Assistance? link. The Need Assistance? page is displayed. Select the Need Help? link. The EPP User ID/Password Quick Reference guide is displayed. Then, follow the instructions as per the EPP User ID/Password Quick Reference Guide.

**Need Assistance?**

Need assistance with accessibility?
See the [accessibility section](#) of the MyEPP Procedure Manual.

Need assistance with logging in?
Need Help?

Have questions about your payroll or benefits?
Contact your Personnel or HR Office.

Experiencing difficulty using the app?
Call the NFC Contact Center at [1-855-632-4468](tel:1-855-632-4468) during the hours of operation of 06:30 am to 5:00 pm Central time, Monday through Friday (except on Federal Holidays).

---

**Figure 3: Need Assistance Page**

**Logging in to EPP for the First Time**

This topic has been updated to include the new EPP Landing page.

The Login page allows the user to log in to EPP for the first time.
To Log in to EPP for the First Time:

2. Select the Applications tab. The Application Launchpad is displayed.
3. On the Application Launchpad, select My EPP. A Warning page is displayed.

Figure 4: New EPP Warning Page
4. Select the **I Agree** button. The My Employee Personal Page login page is displayed.

![My Employee Personal Page Launch Pad Page](image-url)

*Figure 5: EPP Launch Pad Page*
5. Select a **Sign In Option** in accordance with the information provided in your EPP sign up letter. The Security Measures for Your Employee Personal Page is displayed.

![Security Measures for Your Employee Personal Page](image)

**Figure 6: Security Measures for Your Employee Personal Page**

6. Complete the fields as follows:

   **New User ID** (see "*New User ID (EPP) Field Instruction*" on page 188)

   **Confirm New User ID** (see "*Confirm New User ID (EPP) Field Instruction*" on page 177)

   **New Password** (see "*New Password (EPP) Field Instruction*" on page 188)
**Confirm New Password** (see "Confirm New Password (EPP) Field Instruction" on page 176)

7. Select the **Save** button. The Enter Your Work E-mail Address page is displayed.

![Image of Enter Your Work E-mail Address page]

**Figure 7: Enter Your Work E-mail Address Page**

Note: To change/modify your email address, refer to the EPP **Preferences** menu option for guidance.

8. Complete the **Work E-mail** (see "Enter Work E-mail Address Field Instruction" on page 185) field.

Note: If the employee has a work email address on IRIS Program IR119, Employee Personnel Data, it will be displayed in this field. The user may edit this field if desired. If the user does not have a work email address (e.g., contractors), they should select the **I do not have a work email address** button and follow the instructions that are displayed.

9. Select the **Submit** button. The Verify Your Work E-mail Address page is displayed.

![Image of Verify Your Work E-mail Address page]

**Figure 8: Verify Your Work E-mail Address Page**

10. Enter the verification code sent to your work email address in the Verification Code field.
11. Select the **Submit** button. The Enter Your Personal E-mail Address page is displayed.

![Figure 9: Enter Your Personal E-mail Address Page](image)

12. Enter your Personal Email address in the Personal E-mail field.

Note: If the user does not have a personal email address, they may reenter their work email address in this field.
13. Select the **Submit** button. The Two-Step Authentication page is displayed.

![Two-Step Authentication](image)

**Figure 10: Two Step Authentication with Phone Call**

14. On the Two-Step Authentication page, choose an option to verify your access.

Valid values are:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Text Message (SMS)</strong></td>
<td>Select this radio button if you would like to receive the authentication verification code in the form of a text message (SMS). The message will provide a verification code. Select the <strong>Continue</strong> button. The Two-Step Authentication Phone Number page is displayed.</td>
</tr>
</tbody>
</table>
Authentication Application
Select this radio button if you would like to use the Authentication Application.
Select the Continue button. The Two-Step Authentication App page is displayed.

Phone Call
Select this radio button if you would like to receive the Authentication verification code via an automated phone call.
Select the Continue button. The Two-Step Authentication App page is displayed.

To Utilize the Text Message (SMS) Option:
To utilize the text message option the user will have to provide a United State (US) telephone number. Each time you log in to your account with your password, a one-time use code via text message will be sent to your verified phone number.

Note: If you are outside of the US, you must use the Authentication application option.

Figure 11: Two-Step Authentication Phone Number Page

1. Enter your phone number in the Phone Number field.

Note: The phone number must be able to accept text messages (SMS). If you have lost your phone or changed your phone number, please refer to the EPP Miscellaneous (see "Miscellaneous" on page 134) menu option for guidance.
2. Select the **Submit** button. The Two-Step Authentication (with Verification Code) page is displayed.

![Two-Step Authentication Page - Verification Code Sent to Phone](image)

**Figure 12: Two-Step Authentication Page - Verification Code Sent to Phone**

3. Enter the verification code received via text message (SMS) in the Verification Code field.

   Note: If you do not receive the code within 10 minutes, select **Send new code**.

4. Select the **Submit** button. You will receive a text message on your phone confirming **2-Factor enabled**. You are now logged in to EPP.

**To Utilize the Authentication Application Option:**

The Authentication applications generate security codes without requiring internet connection or mobile service. User will need to download an authentication app to your computer or phone.
1. On your phone, open your Authentication app. The Two-Step Authentication (Key Code or Scan Code) page is displayed.

![Two-Step Authentication App Page](image)

Figure 13: Two-Step Authentication App Page

2. Enter or copy the key code from the app into the space provided under item number 3.

   OR

   Scan the code.

3. Select the **Submit** button.

**To Utilize the Phone Call Option:**

To utilize the phone call option you will have to provide a U.S. telephone number. Each time you log in to your account with your password, a one-time-use code will be sent to your verified phone number via an automated phone call.
Note: If you are outside of the U.S., you must use the Authentication application option.

1. Enter your phone number in the Phone Number field.

2. Select the **Submit** button. The Two-Step Authentication (verification code) page is displayed. You will receive an automated phone call providing a verification code.

3. Enter the verification code provided in the Verification Code field.
4. Select the **Submit** button. The My EPP Main Menu page is displayed.

Note: By selecting the **Phone Call** option to receive the verification code, each time you log in to your account, a one-time use code will be sent via an automated phone call to the verified phone number. Enter the code to access your account. Message and data rates may apply.

To change the selected two-factor authentication option to another option, go to **Preferences**, and select **Change Two-Step Authentication**.

---

### Registering Your Two-Step Authentication

The Registering Your Two-Step Authentication page allows the user to choose how they would prefer to receive the Two-Step Authentication verification code.

**To Register Your Two-Step Authentication:**


2. Select the Applications tab. The Application Launchpad is displayed.

3. On the Application Launchpad, select My EPP. A Warning page is displayed.

![Figure 16: New EPP Warning Page](image)

---

**Figure 16: New EPP Warning Page**
4. Select the **I Agree** button. The My Employee Personal Page login page is displayed.

![My Employee Personal Page](image)

**Figure 17: EPP Launch Pad Page**

5. From the **Choose a Sign In Option** menu, select a sign in option.

Valid values are:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
6. Complete the fields as follows:
   - User ID
   - Password

7. Select the **Log in** button. The Enter Your Work E-mail Address page is displayed.

![Figure 18: Enter Your Work E-mail Address Page - With Name Filled](image)

8. Verify that the email address shown is your correct work email address by selecting the **Submit** button. The Verify Your Work Email Address (with Verification Code) page is displayed.

![Figure 19: Verify Your Work E-mail Address Page - Verification Code Entry](image)

9. Enter the verification code that was sent to your work email in the space provided.
10. Select the **Submit** button. The Enter Your Personal E-mail Address page is displayed.

![Figure 20: Enter Your Personal E-mail Address (with Personal E-mail displayed) Page](image)

11. Verify that the email address shown is your correct personal email address by selecting the **Submit** button. The Verify Your Personal Email Address (with Verification Code) page is displayed.

![Figure 21: Verify Your Personal E-mail Address Page - Verification Code](image)

12. Enter the verification code that was sent to your personal email in the space provided.
13. Select the **Submit** button. The Two-Step Authentication page is displayed.

![Two-Step Authentication](image)

**Figure 22: Two Step Authentication with Phone Call**

14. On the Two-Step Authentication page, choose an option to verify your access.

Valid values are:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Text Message (SMS)</strong></td>
<td>Select this <strong>radio</strong> button if you would like to receive the authentication verification code in the form of a text message (SMS). The message will provide a verification code. Select the <strong>Continue</strong> button. The Two-Step Authentication Phone Number page is displayed.</td>
</tr>
</tbody>
</table>
Authentication Application

Select this radio button if you would like to use the Authentication Application.

Select the Continue button. The Two-Step Authentication App page is displayed.

Phone Call

Select this radio button if you would like to receive the Authentication verification code via an automated phone call.

Select the Continue button. The Two-Step Authentication App page is displayed.

To Utilize the Text Message (SMS) Option:

1. Enter your phone number in the Phone Number field provided.

   Note: The phone number must be able to accept text messages (SMS).

   **Figure 23: Two-Step Authentication Phone Number Page**

   Note: If you have lost your phone or changed your phone number, please refer to the EPP Miscellaneous (see "Miscellaneous" on page 134) menu option for guidance.

2. Select the Submit button. The Two-Step Authentication (with Verification Code) page is displayed.
Your phone will receive a verification code via text message (SMS).

![Two-Step Authentication Page - Verification Code Sent to Phone]

**Figure 24: Two-Step Authentication Page - Verification Code Sent to Phone**

3. Enter the Verification Code in the field provided.

Note: If you do not receive the code within 10 minutes, select *Send new code*.

4. Select the **Submit** button. You will receive a text message on your phone confirming **2-Step Authentication enabled**. You are now logged in to EPP.
The EPP Main Menu page is displayed.

Figure 25: EPP News and Announcements Page
**To Utilize the Authentication Application Option:**

1. On your phone, open your Authentication app. The Two-Step Authentication (Key Code or Scan Code) page is displayed.

   ![Two-Step Authentication App Page](image)

   **Figure 26: Two-Step Authentication App Page**

   2. Enter or copy the key code from the app into the space provided under item number 3.

   **OR**

   Scan the code

   3. Select the **Submit** button.

**To Utilize the Phone Call Option:**

To utilize the phone call option you will have to provide a U.S. telephone number. Each time you log in to your account with your password, a one-time-use code will be sent to your verified phone number via an automated phone call.
Note: If you are outside of the U.S., you must use the Authentication application option.

Figure 27: Two Step Authentication - Enter Phone Number

1. Enter your phone number in the Phone Number field.

2. Select the Submit button. The Two-Step Authentication (verification code) page is displayed. You will receive an automated phone call providing a verification code.

Figure 28: Two Step Authentication - Enter Verification Code

Note: If you do not receive the code within 10 minutes, select Resend Code.

3. Enter the verification code provided in the Verification Code field.
4. Select the **Submit** button. The My EPP Main Menu page is displayed.

Note: By selecting the **Phone Call** option to receive the verification code, each time you log in to your account, a one-time use code will be sent via an automated phone call to the verified phone number. Enter the code to access your account. Message and data rates may apply.

To change the selected two-factor authentication option to another option, go to **Preferences**, and select **Change Two-Step Authentication**.

---

**Logging In**

This topic has been updated to include the new EPP Landing page.

The Log In page allows you to log in to EPP.

**To Log in to EPP:**

1. Connect to **NFC Home page** ([http://www.nfc.usda.gov](http://www.nfc.usda.gov)).
2. Select the Applications tab. The Application Launchpad is displayed.
3. Select the My EPP icon. The EPP Warning banner page is displayed.

![Figure 29: New EPP Warning Page](image-url)
4. Select the **I Agree** button. The My Employee Personal Page login page is displayed.

![EPP Launch Pad Page](image_url)

**Figure 30: EPP Launch Pad Page**

5. From the **Choose a Sign In Option** menu, select a sign in option.

Valid values are:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sign with EPP Account</td>
<td></td>
</tr>
<tr>
<td>Sign in with EPP Account</td>
<td></td>
</tr>
</tbody>
</table>
6. Complete the fields as follows:

**User ID**

**Password** (see "Password Field Instruction" on page 189)

7. Select the **Log in** button.

Note: When registering your Two-Step Authentication, if you chose to receive the verification code via text message/SMS, your phone will receive the text message code at this time. If you chose Authentication Application, proceed to the Authentication Application option. If you chose Phone Call your phone will receive a call at this time. The Two-Step Authentication (verification code) page is displayed.

**Text Message Option:**

If the Text Message Option was chosen, the Two-Step Authentication page Verification Code is displayed.

Your phone will receive a verification code via text message/SMS.

1. Enter the verification code via text message (SMS) in the Verification Code field.

   **Note:** If you do not receive the code within 10 minutes, select **Send new code**.

2. Select the **Submit** button. You will receive a text message on your phone confirming **2-Step Authentication enabled**. You are now logged in to EPP.
Authentication Application Option:

If the Authentication Application Option was chosen, the Two-Step Authentication (Key Code or Scan Code) page is displayed.

1. Open the Authentication app on your cell phone.

2. Enter or copy the key code from the app into the space provided under item number 3. OR

   Scan the code.

3. Select the Submit button. You are now logged in to EPP.

Phone Call Option:

If the phone call option was chosen, each time you log in to your account with your password, a one-time-use code will be sent to your verified phone number via an automated phone call.
Note: If you are outside of the U.S., you must use the Authentication Application option.

![Two-Step Authentication Page](image)

**Figure 33: Two-Step Authentication Page - Verification Code Sent to Phone**

1. Enter the verification code in the field provided.

   Note: If you do not receive the code within 10 minutes, select **Resend code**.

2. Select the **Submit** button. You are now logged in to EPP.

**Login Instructions Using eAuthentication**

This topic has been updated to include the new eAuthentication page layout.

**To Log In Using eAuthentication with LincPass:**

If the Agency accesses the application using the eAuthentication Login, follow the steps below.


2. Select the Applications tab. The Application Launchpad is displayed.
3. Select the **I Agree** button. The Please Select Your Agency page is displayed.

![Figure 34: eAuthentication Select Your Agency Page](image)

4. Select your Agency from the drop-down menu.
5. Select the **Submit** button. The Save Agency popup appears.

**Save Agency?**
You have selected U.S. Department of Agriculture. Do you want to save this as your default agency for all future logins?

Note: if you need to change your default agency in the future, you will need to delete your browser cookies

[Yes] [No]

**Figure 35: eAuthentication Save Agency Pop Up Page**

6. Select the **Yes** button. The eAuthentication Log In page is displayed.

**Figure 36: eAuthentication Login Page**
7. Select the **Log In with PIV/CAC** button to log in. The Windows Security Select a Certificate page is displayed.

8. Select the **OK** button. The applicable Windows Security Smart Card popup will appear.

---

**Note:** Prior to selecting the **OK** button, ensure that the credential information displayed on the Certificate page is correct. If not, select the **More choices** option, select the correct credentials, then select the **OK** button.

9. Enter your PIN.

10. Select the **OK** button.

**To Log In Using eAuthentication with a User ID and Password:**

1. Connect to the applicable Web site for the application. A Warning page is displayed.
2. Select the I Agree button to acknowledge that you are aware that you are accessing a Government computer. The Login page is displayed.

![Image of eAuthentication Login Page]

Figure 37: eAuthentication Login Page

3. Complete the Log In fields as follows:

   **User ID** (see "User ID (Sign Up Letter) Field Instruction" on page 195)

   **Password** (see "Password (Sign Up Letter) Field Instruction" on page 189)
4. Select the **Log In with Password** button. The Two-Step Authentication page is displayed.

![Two-Step Authentication Page](image)

**Figure 38: Two-Step Authentication Page - Verification Code Sent to Phone**

5. Enter the Verification Code.

6. Select the **Submit** button.

**Exiting EPP**

The user can log out of EPP at any time by selecting **Log Out** on any page. After the user has successfully logged out of EPP, this page is displayed.

![EPP Log Out Page](image)

**Figure 39: EPP Log Out Page**
EPP Home Page

The EPP Home page allows users to access their personal information. Users can also view the latest news and announcements, which include announcements for all employees, and messages targeted to specific groups of employees. Organizations can request that messages be posted in the News section of the Home page by specifying either Department, Agency, or Department and Agency, and personnel office identifier (POI).

From the Log In page, select the Log In button. The EPP Home page is displayed.

![My EPP Home Page](image)

Figure 40: My EPP Home Page

Note: Options available on the EPP Home page may vary upon Agency Specifications and employee preferences (e.g., Flex Spending Accounts).

This section includes the following topics:
Financial Disclosure

The Financial Disclosure option allows authorized users to access and complete the OGE-278, Financial Disclosure form.

For more information see:

OGE-278 ..................................................................................................................42

OGE-278

The OGE-278 is completed by candidates, nominees, new entrants, incumbents, and terminees of certain high-level positions in the executive branch of the Federal Government. The OGE-278 collects pertinent financial information for conflict-of-interest reviews and public disclosure. The financial information collected includes assets and income, transactions, gifts, reimbursements and travel expenses, liabilities, agreements or arrangements, outside positions, and compensation. For more information regarding the OGE-278 or detailed instructions on completing this form, select the Instructions option from the menu at the top of the OGE-278 On-Line page.
Select the **OGE-278** component. The OGE-278 On-Line page is displayed.

![Figure 41: OGE-278 On-Line Page](image)

**Leave Calculator**

The **Leave Calculator** option allows users to view their leave information, plan their leave usage, maintain their leave history, and create leave slips. The leave calculator also displays the user’s projected end-of-year annual leave accruals and, if that balance is greater than 240 hours, their projected use-or-lose leave balance.

The leave calculator is not an official record of leave usage. The Earnings and Leave (E&L) Statement is the official record of leave usage. For pay periods that have already been processed, the leave calculator receives its leave balances from the E&L Statement. For the current pay period and future pay periods, the leave calculator calculates the projected leave balances based on the most recent E&L Statement, data entered in the leave calculator, and expected leave accruals.

Leave values are displayed and entered in quarter hour increments. For example: A leave value of 30 minutes is displayed as 0.50. A leave value of 1 hour and 15 minutes is 1.25. Clock times are not used in the leave calculator; i.e., an hour and a half is displayed as 1.50 and not as 1:30.
Daily values and pay period totals in red indicate used leave. Daily values and pay period totals in green indicate earned leave. Leave balances in green indicate positive leave balances. Leave balances in red indicate negative leave balances.

For more information see:

- **Entering Leave Data** .................................................................44
- **Show or Hide Weekends** ............................................................46
- **Create Leave Slip** ..................................................................46
- **Print Calendar** .......................................................................47
- **Print Annual Leave Summary** ..................................................48
- **Print Sick Leave Summary** ......................................................49
- **Print Comp Leave Summary** ....................................................50
- **Print My Leave Summary** .......................................................51
- **Switch to Manual Entry** ............................................................52

**Entering Leave Data**

The *Leave Calculator* option allows users to plan and enter their leave on a selected pay period schedule.
To Enter Leave Data:

1. Select the **Leave Calculator** component. The Leave Calculator page is displayed.

![Leave Calculator Page](image)

**Figure 42: Leave Calculator Page**

2. Select the applicable year to view or enter leave data. The current year is displayed by default.

3. Select the applicable pay period to view or enter leave data. The current pay period is displayed by default.

4. Complete the fields as follows:

   - **Starting Balance** (see "Starting Balance Field Instruction" on page 192)
   - **Annual** (see "Annual Field Instruction" on page 173)
   - **Sick** (see "Sick Field Instruction" on page 191)
   - **Comp** (see "Comp Field Instruction" on page 175)
   - **My Leave** (see "My Leave Field Instruction" on page 189)
My Leave 1 (see "My Leave Field Instruction" on page 189)
My Leave 2 (see "My Leave Field Instruction" on page 189)
PP Total (see "PP Total Field Instruction" on page 190)
Accr (see "Accrued Field Instruction" on page 171)
Ending Balance (see "Ending Balance Field Instruction" on page 185)

5. Select Save to save the leave data entered.

Show or Hide Weekends

The Options drop-down list allows users to show or hide weekends on the pay period schedule.

To Show or Hide Weekends:

From the Leave Calculator page, select Show Weekends from the Options drop-down list. The weekends are displayed

   OR

From the Leave Calculator page, select Hide Weekends from the Options drop-down list. The weekends are hidden.

Create Leave Slip

The Create Leave Slip option on the Options drop-down list allows users to create leave slips as PDF files.

To Create a Leave Slip:

1. From the Leave Calculator page, select Create Leave Slip from the Options drop-down list.

2. Select the day(s) in the calendar to create the leave slip.

   Note: The day(s) selected must contain an existing leave entry.
3. Select **GO**. The Leave Calculator with Make Leave Slip page is displayed.

![Leave Calculator with Make Leave Slip Page](Image)

**Figure 43: Leave Calculator with Make Leave Slip Page**

4. Select **Make Leave Slip** to create a leave slip for the days selected. The Leave Slip with the selected leave data is displayed in PDF form. The user has the option to edit and save the leave slip before printing.

**OR**

Select **Cancel** to cancel the action.

**Print Calendar**

The **Print Calendar** option on the Options drop-down list allows users to view their pay period calendar from a selected pay period to the end of a selected year.
To Print a Pay Period Calendar:

1. From the Leave Calculator page, select the year to be included in the pay period calendar.
2. Select the pay period for the pay period calendar to begin with.
3. Select **Print Calendar** from the Options drop-down list.
4. Select **Go**. The Employee Personal Page Leave Calendar page is displayed for the selected year.

![Employee Personal Page Leave Calendar Page](image)

Figure 44: Employee Personal Page Leave Calendar Page

Print Annual Leave Summary

The **Print Annual Leave Summary** option on the Options drop-down list allows users to view their compensatory leave summary from a selected pay period to the end of a selected year.

To Print an Annual Leave Summary:

1. From the Leave Calculator page, select the year to be included in the leave summary.
2. Select the pay period for the leave summary to begin with.
3. Select **Print Annual Leave Summary** from the Options drop-down list.
4. Select **Go**. The Annual Leave Summary page is displayed for the selected year.

![2013 Annual Leave Summary as of 12/5/2012](image)

**Figure 45: Annual Leave Summary Page**

**Print Sick Leave Summary**

The **Print Sick Leave Summary** option on the Options drop-down list allows users to view their sick leave summary from a selected pay period to the end of a selected year.

**To Print a Sick Leave Summary:**

1. From the Leave Calculator page, select the year to be included in the leave summary.
2. Select the pay period for the leave summary to begin with.
3. Select **Print Sick Leave Summary** from the Options drop-down list.
4. Select **Go**. The Sick Leave Summary page is displayed for the selected year.

![Sick Leave Summary as of 12/5/2012](image)

**Figure 46: Sick Leave Summary Page**

**Print Comp Leave Summary**

The **Print Comp Leave Summary** option on the Options drop-down list allows users to view their compensatory leave summary from a selected pay period to the end of a selected year.

**To Print a Comp Leave Summary:**

1. From the Leave Calculator page, select the year to be included in the leave summary.
2. Select the pay period for the leave summary to begin with.
3. Select **Print Comp Leave Summary** from the Options drop-down list.
4. Select Go. The Comp Leave Summary page is displayed for the selected year.

![Comp Leave Summary Page]

**Print My Leave Summary**

The **Print My Leave Summary** option on the Options drop-down list allows users to view their leave summary from a selected pay period to the end of a selected year.

**To Print a Leave Summary:**

1. From the Leave Calculator page, select the year to be included in the leave summary.
2. Select the pay period for the leave summary to begin with.
3. Select **Print My Leave Summary** from the Options drop-down list.
4. Select Go. The My Leave Leave Summary page is displayed for the selected year.

![My Leave Leave Summary Page](image)

### Switch to Manual Entry

The **Switch to Manual Entry** option on the Options drop-down list allows users to enter their Time and Attendance (T&A) data manually instead of selecting data from the number box.

**To Switch to Manual Entry:**

1. From the Leave Calculator page, select **Switch to Manual Entry** from the Options drop-down list.

2. Select Go. The pay period schedule is ready for manual entry.

---

**Note:** To stop using manual entry, select **Stop Using Manual Entry** from the Options drop-down list then select Go.
Benefits Statement

The annual statement of employee compensation and fringe benefits, the Benefits Statement, is the estimated value of benefits available to an employee or his/her survivors in the event of voluntary retirement, disability retirement, or death. The **Benefits Statement** option also displays estimated annuity benefits and account balances from the Thrift Savings Plan (TSP); Old-Age, Survivors, and Disability Insurance (OASDI) and/or Hospital Insurance Tax (HITS)/Medicare benefits; and general guidance.
The **Benefits Statement** option displays the employee’s compensation and benefits.

**Figure 49: Your Personal Benefits Statement Page**

### Who Will Receive the Benefits Statement

The Benefits Statement will be available for each employee who is eligible for retirement benefits and is covered by one of the retirement coverage codes listed below.
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>C</td>
<td>Civil Service Retirement System (CSRS) Offset</td>
</tr>
<tr>
<td>D</td>
<td>CSRS Offset (Congressional) Federal Insurance Contributions Act (FICA)</td>
</tr>
<tr>
<td>E</td>
<td>FICA and CSRS - For law enforcement and firefighter personnel</td>
</tr>
<tr>
<td>G</td>
<td>FICA and Foreign Service Retirement and Disability System (FSRDS)</td>
</tr>
<tr>
<td>I</td>
<td>Federal Employees Retirement System (FERS) (Congressional) FICA</td>
</tr>
<tr>
<td>IF</td>
<td>Foreign Service Pension System (FSPS) (Further Revised Annuity Employees (FRAE)) - (Congressional)</td>
</tr>
<tr>
<td>IR</td>
<td>FERS-RAE (Revised Annuity Employees) (Congressional) (pending Office of Personnel Management (OPM) approval)</td>
</tr>
<tr>
<td>K</td>
<td>FERS and FICA</td>
</tr>
<tr>
<td>KF</td>
<td>FERS (FRAE)</td>
</tr>
<tr>
<td>KR</td>
<td>FERS-RAE and FICA</td>
</tr>
<tr>
<td>M</td>
<td>FERS and FICA - Special</td>
</tr>
<tr>
<td>MF</td>
<td>FERS (FRAE) - Special</td>
</tr>
<tr>
<td>MR</td>
<td>FERS-RAE and FICA - Special</td>
</tr>
<tr>
<td>O</td>
<td>Customs and Border Protection Officers (CBPO) FERS Enhanced</td>
</tr>
<tr>
<td>OF</td>
<td>FERS (FRAE) CBPO</td>
</tr>
<tr>
<td>OR</td>
<td>FERS-RAE and FICA - Special (CBPO)</td>
</tr>
<tr>
<td>P</td>
<td>FSPS and FICA</td>
</tr>
<tr>
<td>PF</td>
<td>FSPS (FRAE)</td>
</tr>
<tr>
<td>PR</td>
<td>FSPS-RAE and FICA</td>
</tr>
<tr>
<td>Q</td>
<td>CBPO CSRS Offset</td>
</tr>
<tr>
<td>R</td>
<td>FICA and CSRS (Full)</td>
</tr>
<tr>
<td>T</td>
<td>FICA and CSRS - Special (Full) - For law enforcement and firefighter personnel</td>
</tr>
<tr>
<td>0</td>
<td>CBPO Enhanced CSRS</td>
</tr>
<tr>
<td>1</td>
<td>CSRS</td>
</tr>
<tr>
<td>3</td>
<td>FSRDS</td>
</tr>
</tbody>
</table>
Each part-time employee, with one of the retirement plans listed above and one of the following work schedules, will receive a Benefits Statement for his/her applicable retirement plan:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>P</td>
<td>Part-time</td>
</tr>
<tr>
<td>Q</td>
<td>Part-time seasonal</td>
</tr>
<tr>
<td>S</td>
<td>Part-time job sharer</td>
</tr>
<tr>
<td>T</td>
<td>Part-time seasonal job sharer</td>
</tr>
</tbody>
</table>

**Who Will Not Receive the Benefits Statement**

Some employees may not receive the Benefits Statement for the following reasons:

- The employee's retirement coverage code is not displayed on the above list.
- The employee is intermittent seasonal (e.g., other than work schedule P, Q, S, or T).
- The employee's 6C Retirement Date identifies the service computation date for employees appointed to law enforcement and firefighter positions or Customs and Border Protection offices. This entails that a special retirement deduction rate (Retirement Coverage Code 0, 6, E, M, O, Q, or T) in the Information/Research Inquiry System (IRIS) Program IR102, Dates & Misc Sal/Pers Data, is invalid. Invalid means that the 6C Retirement Date is earlier than the retirement service computation date or is later than the Benefits Statement date.
- The employee is not eligible for retirement benefits.
- The employee was separated in Pay Period 26 of the prior year or Pay Period 01 of the current year.
- The employee is a Federal Deposit Insurance Corporation annuitant with FERS annuitant indicator A or G or CSRS annuitant indicator 1 or 6.
- The employee's Agency has elected not to issue the Benefits Statement. (See those Agencies below.)

At the Agency's request, the Benefits Statement will not be created for employees of the following Agencies:

- Architect of the Capitol
• Commission on Security and Cooperation in Europe
• Congressional Budget Office
• Consumer Financial Protection Bureau
• Office of the Comptroller of the Currency
• Smithsonian Institution (Trust)
• Treasury Technical Assistance
• U.S. Botanic Garden
• U.S. Capitol Police
• U.S. Senate Restaurants

Also, the Benefits Statement will not be created for employees with the following work schedule codes:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>I</td>
<td>Intermittent</td>
</tr>
<tr>
<td>J</td>
<td>Intermittent seasonal</td>
</tr>
</tbody>
</table>

**Personal Information**

The **Personal Info** option allows users to make change requests to their residence address, Federal and State tax withholding, financial allotments, direct deposit, health insurance, and TSP contribution information through the Employee Self-Service (ESS) option. Users can elect for these changes to become effective for either the current or a future pay period.

Any self-service request that was previously entered is displayed in the Self-Service History section of the page. The status types and descriptions are as follows:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>The change request has not been entered or processed. It can be modified or deleted.</td>
</tr>
<tr>
<td>In Process</td>
<td>The change request is effective in a future pay period and is being held until processing begins for that pay period. Contact your Human Resources (HR) office for assistance if you want to make changes to this request.</td>
</tr>
<tr>
<td>Processed/Complete</td>
<td>The change request has been processed and updated successfully.</td>
</tr>
</tbody>
</table>
The change request has been processed, but errors were found. The errors must be corrected by your HR office before it can be processed successfully. Contact your HR office for more information.

The change request has been processed, but could not be completed because a matching request was found. It was deleted to prevent another request from processing successfully.

The change request has been processed, but errors were found, and it was deleted by your HR office. Contact your HR office for more information.

Any self-service request that was previously entered can be changed or deleted by selecting Edit or Delete in the Pending Self-Service Request section of the selected Self-Service page.

For more information see:

- Debt Management .......................................................... 59
- Direct Deposit ................................................................. 60
- Earnings and Leave Statements .......................................... 64
- Ethnicity and Race Identification (ERI), Gender, and Disability ....... 67
- Financial Allotments .......................................................... 78
- Federal Tax (W-4) ............................................................... 86
- Flexible Spending Accounts ................................................ 92
- Health Insurance ............................................................. 94
- Health Savings Account ................................................... 102
- Life Insurance .................................................................. 109
- Leave ............................................................................... 111
- Residence Address ............................................................ 111
- State Tax ........................................................................... 115
- Third Party Debt ............................................................... 120
- Thrift Savings Plan ............................................................. 121
- Veteran Status and Preference ........................................... 128
- W-2 ................................................................................. 131
- 1095-C ............................................................................. 132
- Miscellaneous .................................................................. 134
**Debt Management**

The **Debt Management** option allows employees to view their current debt information. The Debt Summary Statement is only available to those employees with debt(s).

![Debt Management Page](image)

**Figure 50: Debt Management Page**

**To View the Summary Statement:**

1. Select the **Debt Management** link located beneath the **Personal Info** menu on the EPP home page. The Debt Summary Statement will be displayed with a list of debts.
2. Select the View Details icon for the applicable bill number and type to view the specific details. The Debt Details page will be displayed with additional information about the debt. This is a view-only page.

Note: For more information on debts, see the Administrative Billings and Collection System (ABCO) procedure.

**Direct Deposit**

The Direct Deposit option allows the user to view their current Direct Deposit data and start or change a Direct Deposit/Electronic Funds Transfer (DD/EFT).

Note: Only one direct deposit is allowed; however, up to 16 financial allotments may be designated.

For more information see:

- View Current Direct Deposit Data ..............................................................................60
- Start a New Direct Deposit ..........................................................................................61
- Change an Existing Direct Deposit ..............................................................................64

**View Current Direct Deposit Data**

This topic has been updated to include a Note stating the number of Direct Deposits and Financial Allotments allowed.

**To View Current Direct Deposit Data:**

Select the Direct Deposit component. The Direct Deposit for Net Pay page is displayed. The user’s existing direct deposit data that is stored in the Payroll/Personnel System as of the last effective pay period is displayed.

Note: Only 1 direct deposit is allowed; however, up to 16 financial allotments may be designated.
This topic has been updated to include a Note stating the number of Direct Deposits and Financial Allotments allowed.

The Direct Deposit option allows the user to start a new direct deposit.

Note: If the user has a pending direct deposit, a new direct deposit cannot be entered until the pending one is processed or deleted.

To Start a New Direct Deposit:

1. From the Direct Deposit for Net Pay page, select the Self-Service button. The Enter Direct Deposit Self-Service Request page is displayed.
Note: Only 1 direct deposit is allowed; however, up to 16 financial allotments may be designated.

Figure 51: Enter Direct Deposit Self-Service Request Page

2. Complete the fields as follows:

   Bank Routing Nbr/Name (see "Bank Routing Nbr/Name Field Instruction" on page 174)

   Account Nbr (see "Account Nbr Field Instruction" on page 169)

   Confirm Account Nbr (see "Confirm Account Nbr Field Instruction" on page 175)
**Type of Account** (see "**Type of Account Field Instruction**" on page 193)

**Effective Pay Period, Year** (see "**Effective Pay Period, Year (DD/EFT) Field Instruction**" on page 181)

3. Select the **Continue** button. The Submit Direct Deposit Self-Service Request page is displayed.

![Figure 52: Submit Direct Deposit Self-Service Request Page](image)

The fields are displayed as follows:

**Bank Routing Nbr/Name** (see "**Bank Routing Nbr/Name (Displays) Field Instruction**" on page 174)

**Account Nbr** (see "**Account Nbr (Displays) Field Instruction**" on page 170)

**Type of Account** (see "**Type of Account (Displays) Field Instruction**" on page 194)
Effective Pay Period, Year (see "Effective Pay Period, Year (Displays DD/EFT) Field Instruction" on page 182)

4. Verify the information displayed is correct, then select Submit to submit the direct deposit request. The Submit Direct Deposit Self-Service Request Confirmation page is displayed.

   OR

   Select Back to return to the Direct Deposit Self-Service Request page.

5. Select Exit to return to the Direct Deposit page.

Change an Existing Direct Deposit

This topic has been updated to include a Note stating the number of Direct Deposits and Financial Allotments allowed.

Direct deposits may be made on the Direct Deposit page.

To Change an Existing Direct Deposit:

1. From the Direct Deposit page, select the Self-Service button. The Pending Direct Deposit Self-Service Request page is displayed.

2. Select Edit. The Direct Deposit Self-Service Request page is displayed. Locate the fields to be modified and see field instructions for Start a New Direct Deposit.

   OR

   Select Delete to delete the pending direct deposit. A message appears giving the option to either delete the pending direct deposit or cancel the action and return to the Direct Deposit page.

   Note: Only 1 direct deposit is allowed; however, up to 16 financial allotments may be designated.

Earnings and Leave Statements

The E&L Statements option allows users to view their current and past Earnings and Leave (E&L) Statements.
To View Earnings and Leave Statements:

1. Select the **E&L Statements** component. The E&L Statements page is displayed. The user’s existing E&L Statement that is stored in the Payroll/Personnel System as of the last effective pay period is displayed.
**Figure 53: Earnings & Leave Statements Page**
2. Select the appropriate year you are trying to find from the drop-down. Select **Year** menu.

3. Select the **View Details** icon next to the applicable E&L Statement to display the selected statement.

4. At this point the following options are available:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select <strong>Print-Friendly</strong></td>
<td>To display a printable version of the selected E&amp;L Statement.</td>
</tr>
<tr>
<td>Select <strong>View PDF</strong></td>
<td>To display a PDF version of the selected E&amp;L Statement.</td>
</tr>
<tr>
<td>Select <strong>View Doc (Word)</strong></td>
<td>To display the selected E&amp;L Statement in a Word document.</td>
</tr>
<tr>
<td>Select <strong>View Xls (Excel)</strong></td>
<td>To display the selected E&amp;L Statement in an Excel document.</td>
</tr>
</tbody>
</table>

**Ethnicity and Race Identification (ERI), Gender, and Disability**

The **ERI, Gender, and Disability** option allows users to add or change their Ethnicity and Race Identification (ERI) code, as well as change their gender and disability code through EPP/ESS.
1. Select the **ERI, Gender, & Disability** component. The Ethnicity and Race Identification (ERI), Gender, and Disability page is displayed. The user’s existing ERI, gender, and disability information that is stored in the Payroll/Personnel System as of the last effective pay period is displayed.

Figure 54: Ethnicity and Race Identification (ERI), Gender, and Disability Page
2. From the ERI, Gender, and Disability page select **Self-Service.** The Ethnicity Race Identification (ERI), Gender, and Disability Self Service page is displayed.

![Ethnicity and Race Identification (ERI), Gender, and Disability Self Service Page](image)

**Figure 55: Ethnicity and Race Identification (ERI), Gender, and Disability Self Service Page**

3. At this point the following options are available:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select <strong>Change</strong> next to ERI.</td>
<td>To add new or change existing ERI information.</td>
</tr>
<tr>
<td>Select <strong>Change</strong> next to Gender.</td>
<td>To change existing gender information.</td>
</tr>
<tr>
<td>Select <strong>Change</strong> next to Disability.</td>
<td>To change existing disability information.</td>
</tr>
</tbody>
</table>
For more information see:

- ERI ................................................................. 70
- Gender ............................................................ 73
- Disability ......................................................... 76

**ERI**

The ERI field displays the user’s current ERI information. This information can be added, if none exists, or the user can make changes to their existing information.

Note: To edit ERI information on a pending request, select **Edit** next to the ERI information on the Ethnicity and Race (ERI), Gender, and Disability Self-Service Update page, then follow the instructions listed below for Adding or Changing ERI Information.

Stack: To delete a pending ERI request, select **Delete**, then select **OK** on the Ethnicity and Race Identification (ERI), Gender, and Disability Self-Service Delete Confirmation page.

**To Add or Change ERI Information:**
1. Select Change next to ERI. The Enter Ethnicity and Race Identification (ERI) Self-Service Request page is displayed.

![Image of EPP interface]

Figure 56: Enter Ethnicity and Race Identification (ERI) Self-Service Request Page

2. Complete the applicable fields on the Self-Service Request page

   *Select one or more ERI code that applies* (see "Select One or More ERI Codes That Applies Field Instruction" on page 191)

   *Effective Pay Period, Year* (see "Effective Pay Period, Year (ERI) Field Instruction" on page 182)
3. Select **Continue**. The Submit Ethnicity and Race Identification (ERI) Self-Service Request page is displayed.

![Submit Ethnicity and Race Identification (ERI) Self-Service Request Page](image)

**Figure 57: Submit Ethnicity and Race Identification (ERI) Self-Service Request Page**

The fields are as follows:

*Effective Pay Period, Year* (see "Effective Pay Period, Year (ERI Displays) Field Instruction" on page 182)
4. Verify the information displayed is correct, then select **Submit**. The Ethnicity and Race Identification (ERI) Self-Service Request Confirmation page is displayed.

![Figure 58: Ethnicity and Race Identification (ERI) Self-Service Request Confirmation Page](image)

5. Select **Exit** to return to the Ethnicity and Race Identification (ERI), Gender, and Disability page.

**Gender**

The Gender field displays your current gender information. You can make changes to your existing gender information.

Note: To edit gender information on a pending request, select **Edit** next to gender information on the Ethnicity and Race (ERI), Gender, and Disability Self Service page, then follow the instructions listed below for Changing Gender Information.

To delete a pending gender request, select **Delete**, then click **OK** on the Ethnicity and Race Identification (ERI), Gender, and Disability Pending Self-Service page.
To Change Gender Information:

1. Select the Change button next to the Gender information. The Enter Gender Self-Service Request page is displayed.

   ![Enter Gender Self-Service Request Page](image)

   **Figure 59: Enter Gender Self-Service Request Page**

2. Complete the fields as follows:

   - Male (see "Male Field Instruction" on page 187)
   - Female (see "Female Field Instruction" on page 186)
   - Effective Pay Period, Year (see "Effective Pay Period, Year (Gender) Field Instruction" on page 182)
3. Select **Continue**. The Submit Gender Self-Service Request page is displayed.

![Submit Gender Self-Service Request Page](image)

**Figure 60: Submit Gender Self-Service Request Page**

The fields are as follows:

*Gender* (see "*Gender Field Instruction*" on page 186)

*Effective Pay Period, Year* (see "*Effective Pay Period, Year (Gender Displays) Field Instruction*" on page 182)

4. Verify the information displayed is correct, then select **Submit**. The Gender Self-Service Request Confirmation page is displayed.

5. Select **Exit** to return to the Ethnicity and Race Identification (ERI), Gender, and Disability page.
**Disability**

The Disability field displays your current disability information. You can make changes to your existing disability information.

Note: To edit disability information on a pending request, select the **Edit** button next to disability information on the Ethnicity and Race (ERI), Gender, and Disability Self Service page, then follow the instructions listed below for Changing Disability Information.

To delete a pending disability request, select the **Delete** button, then select the **OK** button on the Ethnicity and Race Identification (ERI), Gender, and Disability Self-Service page.

**To Change Disability Information:**

1. Select the **Change** button next to the disability information. The Enter Disability Self-Service Request page is displayed.

![Figure 61: Enter Disability Self-Service Request Page](image)
2. Complete the fields as follows:

Disability (see "Disability Field Instruction" on page 179)

Effective Pay Period, Year (see "Effective Pay Period, Year (Disability) Field Instruction" on page 181)

3. Select the Continue button. The Submit Disability Self-Service Request page is displayed.

![Submit Disability Self-Service Request Page](image)

Figure 62: Submit Disability Self-Service Request Page

The fields are as follows:

Disability (see "Disability (Displays) Field Instruction" on page 180)

Effective Pay Period, Year (see "Effective Pay Period, Year (Disability) Field Instruction" on page 181)
4. Verify the information displayed is correct, then select the Submit button. The Disability Self-Service Request Confirmation page is displayed.

![Disability Self-Service Request Confirmation Page](image)

Figure 63: Disability Self-Service Request Confirmation Page

5. Select the Exit button to return to the Ethnicity and Race Identification (ERI), Gender, and Disability page.

**Financial Allotments**

The **Financial Allotments** option allows users to view current financial allotments, start new financial allotments, and modify an existing financial allotment.

Note: A maximum of 16 financial allotments are allowed.
For more information see:

View Current Financial Allotments ............................................................ 79
Start a New Financial Allotment ................................................................. 82
Modify an Existing Financial Allotment .................................................. 86

**View Current Financial Allotments**

Users may view their current Financial Allotments. Information includes the bank routing number, the account number, and the allotment amount. Self-service transactions that have been entered are also displayed on this page, if applicable.
To View Current Financial Allotments:

1. Select the **Financial Allotments** component. The Financial Allotments page is displayed. The user’s existing financial allotment data (if any) that is stored in the Payroll/Personnel System, as of the last effective pay period, is displayed.

![Financial Allotments Page](image)

**Figure 64: Financial Allotments Page**

The fields are displayed as follows:

- **Bank Routing Nbr** (see "Bank Routing Nbr (Current) Field Instruction" on page 174)
- **Account Nbr** (see "Account Nbr (Current) Field Instruction" on page 169)
- **Type of Account** (see "Type of Account (Current) Field Instruction" on page 193)
- **Allotment Amount** (see "Allotment Amount (Current) Field Instruction" on page 172)
- **Date Processed** (see "Date Processed (Allotment) Field Instruction" on page 178)
Effective Pay Period, Year (see "Effective Pay Period, Year (Data) Field Instruction" on page 181)

Type of Request (see "Type of Request (Allotment) Field Instruction" on page 195)

Bank Routing Nbr/Name (see "Bank Routing Nbr/Name (Displays) Field Instruction" on page 174)

Account Nbr (see "Account Nbr (Allotment) Field Instruction" on page 169)

Type of Account (see "Type of Account (Allotment) Field Instruction" on page 193)

Allotment Amount (see "Allotment Amount (Displays) Field Instruction" on page 173)

Status (see "Status (Allotment) Field Instruction" on page 192)
**Start a New Financial Allotment**

To Start a New Financial Allotment:

1. From the Financial Allotments page, select **Self-Service**. The Financial Allotment Self-Service Request page is displayed.

![Financial Allotment Self-Service Request Page](image)

**Figure 65: Financial Allotment Self-Service Request Page**
2. Select **Start New Allotment**. The Enter Financial Allotment Self-Service Request page is displayed.

![Image of the Enter Financial Allotment Self-Service Request page]

**Figure 66: Enter Financial Allotment Self-Service Request Page**

3. Complete the fields as follows:

   **Type of Request** (see "*Type of Request (New) Field Instruction*" on page 195)

   **Bank Routing Nbr/Name** (see "*Bank Routing Nbr/Name Field Instruction*" on page 174)

   **Account Nbr** (see "*Account Nbr Field Instruction*" on page 169)

   **Confirm Account Nbr** (see "*Confirm Account Nbr Field Instruction*" on page 175)

   **Type of Account** (see "*Type of Account Field Instruction*" on page 193)

   **Allotment Amount** (see "*Allotment Amount (New) Field Instruction*" on page 173)
Effective Pay Period, Year (see "Effective Pay Period, Year (New) Field Instruction" on page 183)

4. Select **Continue**. The Submit Financial Allotment Self-Service Request page is displayed.

OR

Select **Back** to return to the Financial Allotment Change Request page.

Figure 67: Submit Financial Allotment Self-Service Request Page

The fields are displayed as follows:

**Type of Request** (see "Type of Request (New) Field Instruction" on page 195)

**Bank Routing Nbr/Name** (see "Bank Routing Nbr/Name (New) Field Instruction" on page 174)

**Account Nbr** (see "Account Nbr (New) Field Instruction" on page 170)
Type of Account (see "Type of Account (Allotment) Field Instruction" on page 193)

Allotment Amount (see "Allotment Amount (Displays) Field Instruction" on page 173)

Effective Pay Period, Year (see "Effective Pay Period, Year (Data) Field Instruction" on page 181)

5. Select Continue to submit the financial allotment request. The Financial Allotment Self-Service Request Confirmation page is displayed.

OR

Select Back to return to the Submit Financial Allotment Self-Service Request page.

OR

Select **Enter Another Request** to enter a new financial allotment request.

**Modify an Existing Financial Allotment**

To Modify an Existing Financial Allotment:

1. From the Financial Allotments page, select **Change Allotment**. The Enter Financial Allotment Self-Service Request page is displayed. Locate the fields to be modified and see **Start a New Financial Allotment** (on page 82) for further instructions.

OR

Select **Stop** to terminate the financial allotment.

**Federal Tax (W-4)**

The **Federal Tax (W-4)** option allows users to view their current Federal tax data, establish a new Federal income tax withholding, make changes to their existing Federal income tax withholding data, or claim total exemption from Federal tax withholding.

The following changes can be made to existing Federal income tax withholding data:

- Change the number of exemptions
- Change the filing status
- Establish, increase, or decrease the amount of additional deduction withholding
- File exemption from paying Federal tax

If there was no Federal tax owed in the previous tax year and it is expected that no Federal tax will be owed for the current year, total exemption from Federal tax may be claimed. However, a total exemption from Federal tax must be filed after February 15 of each year.

If the duty station is located in the Republic of Panama, Virgin Islands, Guam, and the northern Mariana Islands, then exemption from Federal income tax may apply. For more information, the user should contact their servicing personnel or payroll office.

If 11 or more exemptions are claimed, the Internal Revenue Service (IRS) will be notified and the user will be placed under IRS control. Once under IRS control, ESS cannot be utilized to increase the number of exemptions. To increase the number of exemptions, the Employee's Withholding Allowance Certificate (W-4) must be submitted to NFC. Users can also use this
option to decrease the number of exemptions. Users should contact their servicing personnel or payroll office for additional information.

If wages exceed $200 per week and total exemption from Federal tax withholding is claimed, the IRS is notified.

For more information see:

**Entering and Modifying a W-4**

This topic has been updated to include the change to Step 3, Claim Dependents, of the W-4, Self Service Request, and renaming of the Total qualifying children and other dependents field.

Users may enter and/or modify their W-4 information in EPP. The filing status, number of exemptions, and additional deductions may all be entered/modified. Self-Service transactions that have been entered are also displayed on this page, if applicable.
To Enter/Modify W-4 Information:

1. Select *Federal Tax (W-4)* from the Personal Info menu. The Federal Tax Certificate (W-4) page is displayed. The user’s existing Federal tax data (if any) that is stored in the Payroll/Personnel System as of the last effective pay period is displayed.

![Image of Federal Tax Certificate (W-4) page](image)

*Figure 69: EPP Federal Tax Certificate (W-4) Page*

2. Select the **Self-Service** button. The Enter Federal Tax (W-4) Self-Service Request page is displayed.

Note: The Self-Service option is only available if your Agency has elected to use this function of EPP. Please contact your personnel office with any questions.
Figure 70: W4 Section 3 Change

3. Complete the fields as follows:
**Filing Status** (see "Filing Status Field Instruction" on page 186)

**Multiple Jobs or Spouse Works** (see "Multiple Jobs or Spouse Works Field Instruction" on page 185)

**Claim Dependents** (see "Claim Dependents Field Instruction" on page 187)

**(Optional) Other Adjustments** (see "(Optional) Other Adjustments Field Instruction" on page 187)

**Effective Pay Period, Year** (see "Effective Pay Period, Year (W-4) Field Instruction" on page 184)
4. Select the **Continue** button. The Submit Federal Tax (W-4) Self-Service Request page is displayed.

![EPP Submit Federal Tax W-4 Self Service Request Page](image)

**Figure 71: EPP Submit Federal Tax W-4 Self Service Request Page**

5. Verify that the information displayed is correct, then select the **Submit** button to submit the Federal Tax (W-4) request. The Federal Tax (W-4) Self-Service Request Confirmation page is displayed.
Note: Select the Back button to return to the Enter Federal Tax (W-4) Self-Service Request page to make any corrections.

![Figure 72: EPP Federal Tax W4 Self Service Request Confirmation Page](image)

6. Select the **Exit Self-Service** button to return to the Federal Tax Certificate (W-4) page.

**Flexible Spending Accounts**

The **Flex Spending Accounts** option allows users to view their current Flexible Spending Account (FSA).

FSA allows employees to contribute money from their salary before taxes are withheld, then get reimbursed for their out-of-pocket expenses for health care and dependent care.

Employees can enroll in the Flexible Spending Accounts for Federal Employees (FSAFEDS) program each year during the Federal Benefits Open Season (November/December timeframe).
by visiting the FSAFEDS Web site at https://www.FSAFEDS.com and clicking **Enrollment**. Open season enrollments are effective January 1 of the following year. Current enrollees must remember to enroll each year to continue participating in FSAFEDS. Enrollment does not carry forward year to year.

New and newly-eligible employees who wish to enroll in this program must do so within 60 days of becoming eligible, but before October 1 of the calendar year. Otherwise, they will have to wait until the start of the open season.

**To View Current FSA:**

1. Select the **Flex Spending Accounts** component. The Flexible Spending Accounts page is displayed.

![Figure 73: Flex Spending Accounts Page](image)

The fields are as follows:

**Plan** (see "Plan Field Instruction" on page 190)
Total Amount (see "Total Amount Field Instruction" on page 193)

Pay Period Amount (see "Pay Period Amount Field Instruction" on page 189)

Balance (see "Balance Field Instruction" on page 173)

Health Insurance

The Health Insurance option allows users to view their current health benefits. Users can only make changes to their Federal Employees Health Benefits (FEHB) program coverage during open season. Open season normally occurs the Monday of the second full workweek in November through the Monday of the second full workweek in December. Users may also make changes to their health benefits outside of open season if they have a qualifying life event such as marriage, the birth or adoption of a child, or an eligible family member loses coverage. Users should contact their servicing personnel or payroll office for more information. Users may also refer to the U.S. Office of Personnel Management’s Web site at www.opm.gov for more detailed information.

For more information see:

View Current FEHB Coverage ..............................................................94
Modify FEHB Coverage ..................................................................97

View Current FEHB Coverage

To View Current FEHB Coverage:
1. Select the **Health Insurance** component. The Health Insurance page is displayed.

![Health Insurance Page](image)

**Figure 74: Health Insurance Page**

The fields are as follows:

- **Plan Code/Description** (see "Plan Code/Description Field Instruction" on page 190)
- **Premium Conversion** (see "Premium Conversion Field Instruction" on page 190)
- **Employee PP Deduction** (see "Employee PP Deduction Field Instruction" on page 184)
- **Agency PP Contribution** (see "Agency PP Contribution Field Instruction" on page 172)
- **Employee YTD Deduction** (see "Employee YTD Deduction Field Instruction" on page 185)
- **Date Processed** (see "Date Processed Field Instruction" on page 178)
Effective Pay Period, Year (see "Effective Pay Period, Year (Health) Field Instruction" on page 183)

Type of Change (see "Type of Change Field Instruction" on page 194)

Plan Code/Name (see "Plan Code/Name Field Instruction" on page 190)

Status (see "Status Field Instruction" on page 192)
Modify FEHB Coverage

To Modify FEHB Coverage:

1. From the Health Insurance option, select Self-Service. The FEHB Self-Service Request page is displayed.
2. Select Change Plan. The Enter FEHB Self-Service Request page is displayed.

![Enter FEHB Self-Service Request](image)

Figure 76: Enter FEHB Self-Service Request Page

3. Complete the fields as follows:

- **Plan Code/Name** (see "Plan Code/Name (Displays) Field Instruction" on page 190)
- **Premium Conversion** (see "Premium Conversion Field Instruction" on page 190)
- **Married?** (see "Married? (FEHB) Field Instruction" on page 187)
- Preferred Phone
- E-mail Address
- Medicare Coverage
Other Insurance Coverage

4. Select **Continue**. The Submit FEHB Self-Service Page is displayed.

![Submit FEHB Self-Service Request Page]

Figure 77: Submit FEHB Self-Service Request Page

The fields are as follows:

**Type of Change** (see "Type of Change Field Instruction" on page 194)

**Effective Pay Period, Year** (see "Effective Pay Period, Year Field Instruction" on page 181)
Plan Code/Name (see "Plan Code/Name Field Instruction" on page 190)

Married? (see "Married? Field Instruction" on page 187)

Preferred Phone

Medicare Coverage

Other Insurance Coverage

Family Members (If applicable)

5. Select Submit. The FEHB Self-Service Request Confirmation page is displayed.
OR

Select **Back** to return to the Enter FEHB Self-Service Request page.

6. Select **Exit** to return to the Health Insurance page.
Health Savings Account

The Health Savings Account option allows users to view their Health Savings Account (HSA) data, start a new HSA, make changes to an existing HSA, or stop an existing HSA.

An HSA is a tax-sheltered trust account owned by the user for the purpose of paying qualified medical expenses for themselves, their spouse, and their dependents. When users enroll in a High Deductible Health Plan (HDHP), the health plan determines whether they are eligible for an HSA based on information provided by the user.

To be eligible for an HSA, IRS regulations state that following requirements are met:

- Must be a participant in an HDHP.
- Cannot be covered by any other health plan that is not an HDHP, except those specifically allowed (e.g., disability, dental, vision, long-term care, and limited expense flexible spending accounts).
- Cannot be claimed as a dependent on someone else’s tax return. (This does not include filing jointly as a spouse.)
- Cannot be enrolled in TRICARE, Medicare, or have received Department of Veterans Affairs (VA) benefits within the previous 3 months.

For more information see:

Start a Health Savings Account ............................................................... 103
Modify a Health Savings Account ........................................................... 109
Cancel a Health Savings Account ............................................................ 109
Start a Health Savings Account

1. Select the **Health Savings Account** component. The Health Savings Account page is displayed. The user’s existing Health Savings Account data (if any) that is stored in the Payroll/Personnel System as of the last effective pay period is displayed.

![Figure 79: Health Savings Account Page](image-url)
2. Select **Self-Service**. The Health Savings Account (HSA) Allotment Self-Service Request page is displayed.

![Image of Health Savings Account (HSA) Allotment Self-Service Request Page]

*Figure 80: Health Savings Account (HSA) Allotment Self-Service Request Page*
3. Check the acknowledgment box at the bottom of the page to acknowledge that eligibility is valid. The **Start New HSA Allotment** button appears.

![Figure 81: Health Savings Account (HSA) Allotment Self-Service Request Start New HSA Allotment Page](image-url)
4. Select **Start New HSA Allotment** to start a new allotment for the Health Savings Account. The Enter Health Savings Account (HSA) Self-Service Request page is displayed.

![Image of the Enter Health Savings Account (HSA) Self-Service Request page]

**Figure 82: Enter Health Savings Account (HSA) Self-Service Request Page**

5. Complete the fields as follows:

   - **Type of Request** (see "**Type of Request (HSA) Field Instruction**" on page 195)
   - **Bank Routing Nbr/Name** (see "**Bank Routing Nbr/Name (HSA) Field Instruction**" on page 174)
   - **Account Nbr** (see "**Account Nbr (HSA) Field Instruction**" on page 170)
   - **Confirm Account Nbr** (see "**Confirm Account Nbr (HSA) Field Instruction**" on page 175)
   - **Allotment Amount** (see "**Allotment Amount Field Instruction**" on page 172)
Effective Pay Period, Year (see "Effective Pay Period, Year (HSA) Field Instruction" on page 183)

6. Select Continue. The Submit Health Savings Account (HSA) Self-Service Request page is displayed.

OR

Select Back to return to the Health Savings Account (HSA) Allotment Self-Service Request page.

Figure 83: Submit Health Savings Account (HSA) Self-Service Request Page

The fields are as follows:

Type of Request (see "Type of Request (HSA) Field Instruction" on page 195)

Bank Routing Nbr/Name (see "Bank Routing Nbr/Name (HSA Displays) Field Instruction" on page 174)
Account Nbr (see "Account Nbr (HSA Displays) Field Instruction" on page 170)

Allotment Amount (see "Allotment Amount (HSA Displays) Field Instruction" on page 173)

Effective Pay Period, Year (see "Effective Pay Period, Year (HSA Displays) Field Instruction" on page 183)

7. Select Submit. The Health Savings Account (HSA) Self-Service Request Confirmation page is displayed.

OR

Select Back to return to the Enter Health Savings Account (HSA) Self-Service Request page.

Figure 84: Health Savings Account (HSA) Self-Service Request Confirmation Page
8. Select Exit. The Health Savings Account (HSA) Allotment Change Request page is displayed.

**Modify a Health Savings Account**

1. Select the **Health Savings Account** component. The Health Savings Account page is displayed. The user’s existing HSA data (if any) that is stored in the Payroll/Personnel System as of the last effective pay period is displayed.

2. Select **Self-Service**. The Health Savings Account (HSA) Allotment Self-Service Request page is displayed.

3. Select **Change Amount** to change the allotment for the HSA. The Enter Health Savings Account (HSA) Self-Service Request page is displayed. For more information on completing these fields, see *Start a Health Savings Account* (on page 103).

**Cancel a Health Savings Account**

1. Select the **Health Savings Account** component. The Health Savings Account page is displayed. The user’s existing HSA data (if any) that is stored in the Payroll/Personnel System as of the last effective pay period is displayed.

2. Select **Self-Service**. The Health Savings Account (HSA) Allotment Self-Service Request page is displayed.

3. Select **Stop** to stop allotment for the HSA. The Enter Health Savings Account (HSA) Self-Service Request page is displayed. For more information on completing these fields, see *Start a Health Savings Account* (on page 103).

**Life Insurance**

The **Life Insurance** option allows users to view their life insurance information.
To View Life Insurance Data:

1. Select the **Life Insurance** component. The Life Insurance page is displayed. The user’s existing life insurance information that is stored in the Payroll/Personnel System as of the last effective pay period is displayed.

![Life Insurance Page](image)

Figure 85: Life Insurance Page

2. The fields are as follows:

   - **Plan Name** (see "Plan Name Field Instruction" on page 190)
   - **Coverage Description** (see "Coverage Description Field Instruction" on page 177)
   - **Basic Coverage Amount** (see "Basic Coverage Amount Field Instruction" on page 175)
Leave

The Leave option allows users to view their applicable leave balances.

To View Leave:

Select the Leave component. The Leave page is displayed.

![Figure 86: Leave Page](image)

Residence Address

The Residence Address option allows users to enter a new residence address or modify their existing residence address. The residence address is used for mailing the W-2, the Personal Benefits Statement, and E&L Statement, unless the user elected to stop receiving a mailed copy. The residence address is also used for employees who receive their checks through the mail.
Users who are using this option to enter a new residence address because they have moved to another State should contact their servicing personnel or payroll office to find out if they must also process a change in their current State and/or city/county tax withholding data.

Users who are separating and whose residence address is also changing should process a change to their residence address prior to their separation in order to prevent erroneous delivery of their final salary payment or severance payments.

**To Enter or Modify the Residence Address:**

1. Select the *Residence Address* component. The Residence Address page is displayed. The user’s existing residence address that is stored in the Payroll/Personnel System as of the last effective pay period is displayed.

![Figure 87: Residence Address Page](image-url)
2. Select **Self-Service**. The Enter Residence Address Self-Service Request page is displayed.

![Image of the Enter Residence Address Self-Service Request page]

**Figure 88: Enter Residence Address Self-Service Request Page**

3. Complete the fields as follows:

   *Street Address Line 1* (see "Street Address Line 1 Field Instruction" on page 187)

   *Street Address Line 2* (see "Street Address Line 2 Field Instruction" on page 187)

   *Street Address Line 3* (see "Street Address Line 3 Field Instruction" on page 187)

   *City, State* (see "City, State Field Instruction" on page 175)

   *Zip Code* (see "Zip Code Field Instruction" on page 196)

   *Zip Code (Optional)* (see "Zip Code (Optional) Field Instruction" on page 196)

   *Effective Pay Period, Year* (see "Effective Pay Period, Year (Address) Field Instruction" on page 181)
4. Select **Continue**. The Submit Residence Address Self-Service Request page is displayed.

**OR**

Select **Exit** to cancel the action and return to the Residence Address page.

![Submit Residence Address Self-Service Request Page](image)

**Figure 89: Submit Residence Address Self-Service Request Page**

The fields are as follows:

- **Residence Address** (see "Residence Address Field Instruction" on page 191)

- **Effective Pay Period, Year** (see "Effective Pay Period, Year (Residence) Field Instruction" on page 183)

5. Select **Submit**. The Residence Address Self-Service Request Confirmation page is displayed.
OR

Select Back to return to the Enter Residence Address Self-Service Request page.

6. Select Exit. The Residence Address page is displayed.

State Tax

The State Tax option allows users to view their current State tax data, establish new State income tax withholding, and make changes to their existing State income tax certificate withholding data.

Users can make the following changes to their existing State income tax withholding data:

- Change the number of exemptions
- Change the marital status
• Establish, increase, or decrease the amount of additional withholding

Note: Users may not change their State, file exempt from State withholding, or claim more than 15 exemptions or dependents through this option.

To Change State Tax Data:

1. Select the **State Tax** component. The State Tax Certificate page is displayed. The user’s existing State tax data that is stored in the Payroll/Personnel System as of the last effective pay period is displayed.

![State Tax Certificate Page](image)

**Figure 91: State Tax Certificate Page**
2. Select **Self-Service**. The Enter State Tax Request page is displayed.

![Enter State Tax Request Page](image)

**Figure 92: Enter State Tax Request Page**

3. Complete the fields as follows:

   * **Effective Pay Period, Year** (see "Effective Pay Period, Year (Tax) Field Instruction" on page 184)

   * Filing Status

   * **Number of Exemptions** (see "Number of Exemptions Field Instruction" on page 188)

   * **Additional Amount to be Withheld Each Pay Period** (see "Additional Amount To Be Withheld Each Pay Period Field Instruction" on page 171)

4. Select **Continue**. The Submit State Tax Certificate Self-Service Request page is displayed.
OR

Select **Exit** to cancel the action and return to the State Tax Certificate page.

![Submit State Tax Request Page](image)

**Figure 93: Submit State Tax Request Page**

The fields are as follows:

*Effective Pay Period, Year* (see "Effective Pay Period, Year (State Tax) Field Instruction" on page 184)

Filing Status

Number of Exemptions

*Additional Amount to be Withheld Each Pay Period* (see "Additional Amount To Be Withheld Each Pay Period (State Tax) Field Instruction" on page 171)

5. Select **Submit** to submit the new tax data. The State Tax Certificate Self-Service Request Confirmation page is displayed.
OR

Select **Back** to return to the Enter State Tax Request page.

OR

Select **Exit** to cancel the action and return to the State Tax Certificate page.

---

**Figure 94: State Tax Certificate Self-Service Request Confirmation Page**
Third Party Debt

The Third Party Debt Management option allows employees to view their current third party debt information. The Debt Summary Statement is only available to those employees with third party debt(s).

Figure 95: Third Party Debt Page

To View Third Party Debt:

1. Select the Third Party Debts link located beneath the Personal Info menu on the EPP home page. The Summary Statement will be displayed with a list of third party debts.

2. Select the View Details icon for the applicable bill number and type to view the specific details. The Debt Details page will be displayed with additional information about the third party debt. This is a view-only page.
Note: For more information on third party debts, see the Administrative Billings and Collection System (ABCO) procedure.

**Thrift Savings Plan**

The TSP option allows users to view their current Thrift Savings Plan (TSP) data. Users can also start, stop, or change TSP contributions.

TSP is a retirement savings and investment plan for Federal employees covered by the Federal Employees Retirement System (FERS) and the Civil Service Retirement System (CSRS).

TSP provides retirement income for participants and offers Federal employees the same type of savings and tax benefits that many private corporations offer their employees under 401(k) plans.

The Thrift Savings Plan Enhancement Act of 2009, Public Law 111-31, signed into law on June 22, 2009, authorized the Federal Retirement Thrift Investment Board (FRTIB) to add a Roth 401(k) feature to the plan. This benefit allows participants to contribute on an after-tax basis to their TSP accounts and receive tax-free earnings when they withdraw the funds (assuming certain criteria are met). For more information on Roth requirements, see the TSP Web site at [https://www.tsp.gov](https://www.tsp.gov).

TSP contributions are voluntary in the amount chosen by the participant. TSP benefits are in addition to employees’ FERS or CSRS annuity. TSP is an important part of a FERS employee’s retirement package, along with their FERS Basic Annuity and Social Security benefits. For CSRS employees, TSP serves as a supplement to their CSRS annuity. For more information about TSP, see the TSP Web site at [https://www.tsp.gov](https://www.tsp.gov).
To Make Changes to TSP:

1. Select the TSP component. The Thrift Savings Plan (Federal and Non-Federal) page is displayed. The user’s existing TSP data that is stored in the Payroll/Personnel System as of the last effective pay period is displayed.

![Figure 96: TSP Page](image-url)
2. Select the **Self-Service** button. The Enter TSP Self-Service Request page is displayed.

![TSP Self Service Page](image)

Figure 97: TSP Self Service Page

3. Select the **Start TSP Roth Contribution** button for Roth transactions. The Enter Roth TSP Self-Service Request page is displayed.
OR

Make the applicable selection on the Pending Self-Self Requests box for TSP transactions.

![Image of the Enter Roth TSP Self-Service Request Page]

Figure 98: Enter Roth TSP Self-Service Request Page

4. Complete the TSP and/or Roth fields as follows:

   **Type of Election** (see "Type of Election Field Instruction" on page 194)

   **Dollar Amount** (see "Dollar Amount Field Instruction" on page 180)

   **Percent of Basic Pay** (see "Percent of Basic Pay Field Instruction" on page 189)

   **Effective Pay Period, Year** (see "Effective Pay Period, Year (TSP) Field Instruction" on page 184)

5. Select the **Continue** button. The Submit TSP Self-Service Request page is displayed.
OR

Select the **Exit** button to cancel the action. The Thrift Savings Plan (Federal and Non-Federal) page is displayed.

![Submit Roth TSP Self-Service Request Page](image)

**Figure 99: Submit Roth TSP Self-Service Request Page**

The fields are as follows:

- **Type of Election** (see "Type of Election (TSP) Field Instruction" on page 194)
- **Dollar Amount** (see "Dollar Amount (TSP) Field Instruction" on page 180)
- **Contributions Per Pay Period** (see "Contributions Per Pay Period (TSP) Field Instruction" on page 189)
- **Effective Pay Period, Year** (see "Effective Pay Period, Year (TSP Displays) Field Instruction" on page 184)
6. Select the **Submit** button to submit the changes entered. The TSP Self-Service Request Confirmation page is displayed.

    OR

Select the **Back** button to return to the Enter TSP Self-Service Request page.

    OR

Select the **Exit** button to cancel the action. The Thrift Savings Plan (Federal and Non-Federal) page is displayed.

![Roth TSP Self-Service Request Confirmation Page](image)

**Figure 100: Roth TSP Self-Service Request Confirmation Page**

7. Select the **Exit** button. The Thrift Savings Plan (Federal and Non-Federal) page is displayed.
For more information see:

- **TSP Catch-Up Contributions** ........................................................................................................... 127
- **TSP Spillover Contributions** ............................................................................................................... 127

**TSP Catch-Up Contributions**

This topic has been updated to include information about spillover contributions.

TSP catch-up contributions were supplemental tax-deferred employee contributions that employees could make to TSP beyond the maximum amount they could contribute through regular contributions.

**Note:** As of Pay Period 26, 2020, catch-up contributions are no longer available, and all TSP contributions should be made in the same manner (including any spillover contributions above the maximum annual contribution amount). Any previous catch-up contributions submitted are still visible via EPP.

For more information, see **TSP Spillover Contributions** (on page 127).

**TSP Spillover Contributions**

Spillover contributions are made in conjunction with regular TSP contributions. There is no special form for spillover contributions. For more information on entering TSP contributions, see **Thrift Savings Plan** (on page 121).

To be eligible to make spillover contributions, the following conditions must apply:

- The employee must be at least age 50 years or older during the calendar year in which the spillover contributions are made (even if the employee becomes age 50 on December 31 of that year).
- The employee must be currently employed and in a pay status (contributions are made through payroll deductions).
- The employee must be making regular contributions to a civilian or uniformed services TSP account (or both) and/or an equivalent employer plan (401(k) 403(b), or 408 plan) that equals the maximum allowed by IRS.

Eligible employees may contribute up to the annual maximum dollar amount allowed by the IRS elective deferral limit.
Since spillover contributions are supplemental, they do not count against the IRS elective deferral limit. However, the combination of regular and spillover TSP contributions cannot exceed the total IRS contribution limit for the year.

Contributions spilling over toward the catch-up limit will be matched, but only up to the 5% of salary to which participants are already entitled.

Spillover contributions apply to the year during which they are made, even if they are posted to the TSP account in the following year (e.g., employee contributions for the last pay date in December may not be posted until January, but will be counted toward the limit in December).

Spillover contributions may only be made from the employee’s basic pay. Bonuses or special pay and incentive pay for members of the uniformed services, cannot be applied towards spillover contributions.

**Veteran Status and Preference**

The Vet Status & Preference option provides current Veterans Status, Veterans Preference, and Veterans Preference for RIF, if applicable.
Select the **Vet Status & Preference** component. The Veteran Status and Preference page is displayed.

**Figure 101: Veteran Status and Preference Page**

The fields are displayed as follows:
### Veterans Status Code

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>Pre-Vietnam-era vet: A veteran whose service ended before the Vietnam era (i.e., before August 5, 1964).</td>
</tr>
<tr>
<td>N</td>
<td>Not a Vietnam-era vet: Employee who may or may not be a veteran, but is not a veteran of the Vietnam era (i.e., employee did not serve during the period August 5, 1964, through May 7, 1975).</td>
</tr>
<tr>
<td>P</td>
<td>Post-Vietnam-era vet: A veteran whose service began after the Vietnam era (i.e., May 7, 1975).</td>
</tr>
<tr>
<td>V</td>
<td>Vietnam-era vet: A veteran who served during the Vietnam era (i.e., from August 5, 1964, through May 7, 1975).</td>
</tr>
<tr>
<td>X</td>
<td>Not a Veteran: Employee who is not a veteran.</td>
</tr>
</tbody>
</table>

### Veterans Preference Code

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>None: Employee has no veterans preference.</td>
</tr>
<tr>
<td>2</td>
<td>5-Point: Employee has a 5-point veterans preference.</td>
</tr>
<tr>
<td>3</td>
<td>10-point disability: Employee has a 10-point veterans preference due to disability.</td>
</tr>
<tr>
<td>4</td>
<td>10-point/compensable: Employee entitled to a 10-point preference due to a compensable service-connected disability of less than 30%.</td>
</tr>
<tr>
<td>5</td>
<td>10-point other: Persons entitled to a 10-point preference in this category: (1) Both the spouse and mother of veterans occupationally disabled because of a service-connected disability and (2) the widow/widower and mother of a deceased wartime veteran.</td>
</tr>
<tr>
<td>6</td>
<td>10-point/30% compensable: Veteran entitled to 10-point preference due to a compensable service-connected disability of 30% or more.</td>
</tr>
<tr>
<td>7</td>
<td>Dishonorable discharge: Veteran not entitled to preference.</td>
</tr>
</tbody>
</table>

### Veterans Preference RIF Code

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>30% or more Disable: Employee is a veteran with 30% or more disability.</td>
</tr>
<tr>
<td>2</td>
<td>Veteran: Employee is a veteran.</td>
</tr>
<tr>
<td>3</td>
<td>Non-Veteran: Employee is a non-veteran.</td>
</tr>
<tr>
<td>4</td>
<td>Veteran (No Retention Rights): Employee is a veteran with no retention rights.</td>
</tr>
<tr>
<td>5</td>
<td>Non-Veteran (Retention): Employee is a non-veteran with retention rights.</td>
</tr>
<tr>
<td>Veterans Preference RIF Code</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Rights)</td>
<td></td>
</tr>
</tbody>
</table>

**W-2**

The **W-2** option allows users to view and print their current or prior year Wage and Tax Statement (**W-2**). The **W-2** cannot be changed. It is generated by the Internal Revenue Service. To make changes to your exemptions/withholdings, see **Federal Tax (W-4)** (on page 86) or **State Tax** (on page 115).

1. Select the **W-2** component. The **W-2** (Wage and Tax Statement) page is displayed.

![Figure 102: W-2 (Wage & Tax Statement) Page](image)

2. Click the view details icon next to the applicable **W-2** to display the selected statement.
3. The following options are available:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click <strong>View Pdf</strong></td>
<td>Displays a PDF version of the selected W-2</td>
</tr>
<tr>
<td>Click <strong>View Doc (Word)</strong></td>
<td>Displays the selected W-2 in a Word document.</td>
</tr>
<tr>
<td>Click <strong>View Xls (Excel)</strong></td>
<td>Displays the selected W-2 in an Excel document.</td>
</tr>
</tbody>
</table>

**1095-C**

The **1095-C** option provides users with their Employer-Provided Health Insurance Offer and Coverage Statement. This report includes information about the health insurance coverage offered by an employer.
To View 1095-C Statement:

1. Select the 1095-C component. The 1095-C page is displayed.

**Figure 103: 1095-C Page**
2. Select the PDF icon. The Employer-Provided Health Insurance Offer and Coverage Statement is displayed.

![Employee-Provided Health Insurance Offer and Coverage Statement](image)

**Figure 104: Employee-Provided Health Insurance Offer and Coverage Statement**

**Miscellaneous**

The *Miscellaneous* option provides users with their basic personnel information.
To View Miscellaneous Data:

1. Select the **Miscellaneous** component. The Miscellaneous page is displayed.

![Miscellaneous Page](image)

**Figure 105: Miscellaneous Page**

### Preferences

This topic has been updated to include removal of the Change W-2 Password and the Change Paperless E&L menu options.

The **Preferences** option allows users to customize their EPP. Users are able to enter an email address to receive replacement passwords, verification of self-service actions, and other email
notifications. This menu also allows users to change their user password, user ID, and PII. Users can also elect whether or not to receive paperless W-2s and Earnings & Leave (E&L) statements.

To Set Your Preferences:

Select the Preferences component. Valid values are:

- Change Email Address(es)
- Change Paper W-2 & 1095-C
- Change Password
- Change Two-Step Authentication
- Change User ID
- Change PII

For more information see:

- Change Email Addresses ................................................................. 136
- Change Paper W-2 & 1095-C .............................................................. 140
- Change Password ............................................................................. 142
- Change Two-Step Authentication ...................................................... 144
- Change User ID ................................................................................. 151
- Change PII .......................................................................................... 153

Change Email Addresses

The Change Email Addresses option allows the user to change their email address(es).
To Change Your Email Address:

1. On the EPP Home page (with Preferences folder expanded), select **Change Email Addresses** to change your email address(es). The Change Email Addresses page is displayed.

![Change Email Addresses Page](image)

Figure 106: Change Email Addresses Page
2. Select the **Change** button to modify the applicable email address. The EPP authentication verification code is sent to the designated phone number or email address assigned to your two-factor authentication. The Change Email Addresses page with Please enter code is displayed.

![Change Email Addresses Page](image)

**Figure 107: Change Email Addresses Page**

3. Enter the six-digit verification code that you received in the designated box.

**Note:** If you have not received the code within ten minutes, select Resend Code.
4. Select the Submit button. The Change Email Addresses page is displayed.

![Image of Change Email Addresses page]

**Figure 108: Change Email Addresses Page**

5. Enter the new email information.
6. Select the **Submit** button. The Change Email Addresses page is displayed.

![Figure 109: Change Email Addresses](image)

**Change Paper W-2 & 1095-C**

This topic has been updated to include the Paperless option.

The **Change Paper W-2 & 1095-C** option allows the user to change receipt of their W-2 and/or 1095-C from paper to an electronic version and vice versa.
To Receive the W-2 & 1095-C Electronically:


![Figure 110: Change Paper W-2 & 1095-C (Paperless Button)](image-url)
2. Select the **Paperless** button to begin receiving your W-2 & 1095-C electronically. The Change Paper W-2 & 1095-C with Confirm button is displayed.

![Figure 111: Change Paper W-2 & 1095-C (Confirm Stop Paper)](image)

3. Select the **Confirm** button.

Note: The Paperless button changes to Paper after you select the Confirm button.

---

**Change Password**

The **Change Password** option allows the user to change their password.
To Change Your Password:

1. On the EPP Home page (with Preferences folder expanded), select **Change Password** to change your password. The Change Password page is displayed.

   ![Change Password Page](image)

   **Figure 112: Change Password Page**

2. Complete the fields as follows:

   - **Current Password** (see "Current Password Field Instruction" on page 177)
   - **New Password** (see "New Password Field Instruction" on page 188)
   - **Confirm New Password** (see "Confirm New Password Field Instruction" on page 176)

3. Select the **Change Password** button to make the password change.
**Change Two-Step Authentication**

The **Change Two-Step Authentication** option allows the user to change their two-step authentication.

**To Change the Two-Step Authentication:**

1. On the EPP Home page (with Preferences folder expanded), select **Change Two-Step Authentication**. The Change Two-Step Authentication page is displayed.

![Change Two-Step Authentication Page](image)

**Figure 113: Change Two-Step Authentication Page**

2. Select the **Reset Security** button. The Change Two-Step Authentication - Verification Code page is displayed.
Note: A verification code is sent to the email of record (check your work email and personal email if unsure which was used).

![Figure 114: Change Two-Step Authentication Page Verification Code](image)

3. Enter the verification code.
4. Select the **Submit** button. The Two-Step Authentication, Choose an Option page is displayed.

![Two-Step Authentication](image)

Figure 115: Two Step Authentication with Phone Call

5. On the Two-Step Authentication page, choose an option to verify your access. Valid values are:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Text Message (SMS)</strong></td>
<td>Select this <strong>radio</strong> button if you would like to receive the authentication verification code in the form of a text message (SMS). The message will provide a verification code. Select the <strong>Continue</strong> button. The Two-Step Authentication Phone Number page is displayed.</td>
</tr>
</tbody>
</table>
Authentication Application

Select this **radio** button if you would like to use the Authentication Application.

Select the **Continue** button. The Two-Step Authentication App page is displayed.

Phone Call

Select this **radio** button if you would like to receive the Authentication verification code via an automated phone call.

Select the **Continue** button. The Two-Step Authentication App page is displayed.

**To Utilize the Text Message (SMS) Option:**

To utilize the text message option the user will have to provide a United State (US) telephone number. Each time you log in to your account with your password, a one-time-use code via text message will be sent to your verified phone number.

**Note:** If you are outside of the US, you must use the Authentication application option.

---

**Figure 116: Two-Step Authentication Phone Number Page**

1. Enter your phone number in the Phone Number field.

**Note:** The phone number must be able to accept text messages (SMS). If you have lost your phone or changed your phone number, please refer to the EPP **Preferences** menu option for guidance.
2. Select the **Submit** button. The Two-Step Authentication (with Verification Code) page is displayed.

![Two-Step Authentication Page](image)

Figure 117: Two-Step Authentication Page - Verification Code Sent to Phone

3. Enter the verification code received via text message (SMS) in the Verification Code field.

   Note: If you do not receive the code within 10 minutes, select **Resend code**.

4. Select the **Submit** button. You will receive a text message on your phone confirming **2-Factor enabled**.

   Your two-step authentication has been updated and you are now logged into EPP.

**To Utilize the Authentication Application Option:**

The Authentication applications generate security codes without requiring internet connection or mobile service. User will need to download an authentication app to your computer or phone.
1. On your phone, open your Authentication app. The Two-Step Authentication (Key Code or Scan Code) page is displayed.

![Two-Step Authentication App Page](image)

**Figure 118: Two-Step Authentication App Page**

2. Enter or copy the key code from the app into the space provided under item number 3.

   OR

   Scan the code.

3. Select the **Submit** button. You will receive a message the **EPP verification code 2-Step Authentication is enabled**.

   Your two-step authentication has been updated and you are now logged in to EPP.

**To Utilize the Phone Call Option:**

To utilize the phone call option you will have to provide a U.S. telephone number. Each time you log in to your account with your password, a one-time-use code will be sent to your verified phone number via an automated phone call.
Note: If you are outside of the U.S., you must use the Authentication application option.

Figure 119: Two Step Authentication - Enter Phone Number

1. Enter your phone number in the Phone Number field.

2. Select the **Submit** button. The Two-Step Authentication (verification code) page is displayed. You will receive an automated phone call providing a verification code.

Figure 120: Two Step Authentication - Enter Verification Code

Note: If you do not receive the code within 10 minutes, select **Resend Code**.

3. Enter the verification code provided in the Verification Code field.
4. Select the **Submit** button. The My EPP Main Menu page is displayed.

Note: By selecting the **Phone Call** option to receive the verification code, each time you log in to your account, a one-time-use code will be sent via an automated phone call to the verified phone number. Enter the code to access your account. Message and data rates may apply.

To change the selected two-factor authentication option to another option, go to **Preferences**, and select **Change Two-Step Authentication**.

---

**Change User ID**

The **Change User ID** option allows the user to change their user ID.
To Change Your User ID:

1. On the EPP Home page (with Preferences folder expanded), select **Change User ID** to change your user ID.

![Change User ID Page](image)

**Figure 121: Change User ID Page**

2. Complete the fields as follows:

   **Current User ID** (see "*Current User ID Field Instruction" on page 177)

   **New User ID** (see "*New User ID Field Instruction" on page 188)

   **Confirm New User ID** (see "*Confirm New User ID Field Instruction" on page 177)

3. Select the **Change User ID** button to change the user ID.
**Change PII**

The *Change PII* option allows the user to unmask and mask certain data fields that house Personally Identifiable Information (PII). Upon entry into EPP the data will be masked as the default.

**To Change PII to Unmasked:**

1. On the EPP Home page (with Preferences folder expanded), select *Change PII*. The Change PII page is displayed.

![Change PII Page](image)

*Figure 122: Change PII Page*
2. Select the UnMask button to unmask PII.

![Change PII Page Unmasked](image)

**Figure 123: Change PII Page Unmasked**

When employees log out of EPP, the data will default back to a masked state. To return the data to a masked state during the same viewing session, select *Change PII* again.

Note: Employees will need to perform the process for unmasking data whenever they log back in to EPP. A banner will display at the top of each page containing PII to inform employees when the PII is masked or unmasked.

On the EPP Login page, the email address(es) that are presented when *Forgot Your Password* or *Forgot Your User ID* is selected (e.g., xxxxxxst@msn.com) will be partially masked.
Time Manager

The **Time Manager** option, if applicable, allows users to enter T&A data which can be submitted to a timekeeper for certification and submission. Users can enter T&A data on a daily basis and use a default schedule as a starting point each pay period. Each Agency must elect to offer their employees the daily entry options through the System for Time and Attendance Reporting (STAR) before they can begin using this feature of EPP. This option is activated at the contact-point level.

For more information see:

- Accounting Favorites ................................................................. 155
- Default Schedule ........................................................................ 158
- Pay Period Schedule ................................................................... 160

**Accounting Favorites**

The **Accounting Favorites** option allows users to select their most commonly used accounting codes, add their own description, and add it to a list of favorites to use when the default schedule is updated or pay period schedule is entered.

Each Agency uses its unique accounting codes and formats. The accounting data is validated when the accounting table is updated. The accounting data entered on the T&A is edited for validity and field length. Each employee’s record maintained by NFC contains the appropriation and accounting information used to disburse and charge the employee’s pay and related expenditures to the proper accounting records.

The accounting codes assigned to the employee’s organization are usually set up by an administrator assigned to that organization. The accounting codes are displayed on the **Accounting Favorites** option.

For more information see:

- Adding Accounting Favorites ...................................................... 155
- Deleting Accounting Favorites ..................................................... 157

**Adding Accounting Favorites**

The **Accounting Favorites** option allows users to select their most commonly used accounting codes and add to a list of favorites to use when entering T&A data.
To Add Accounting Favorites:

1. Select the **Accounting Favorites** component. The Accounting Favorites page is displayed.

![Accounting Favorites Page](image)

**Figure 124: Accounting Favorites Page**

2. Complete the fields as follows:

   - **Accounting Cd/Description** (see "Accounting Cd/Description Field Instruction" on page 170)
   - **Project** (see "Project Field Instruction" on page 191)

3. Select **Add to Favorites** to add the selected accounting code to the favorites list.

   OR

   Select **Delete** to delete the selected accounting code from the favorites list.
Deleting Accounting Favorites

The Accounting Favorites option allows users to simultaneously delete their most commonly used accounting codes stored in their list of favorites.

To Delete Accounting Favorites:

1. Select the Accounting Favorites component. The Accounting Favorites page is displayed.

![Accounting Favorites Page]

2. Select Delete Favorites to delete all of the accounting codes stored in the favorites list. A confirmation is displayed on the page.

Select Delete to delete the entire favorites list.

OR

Select Cancel to cancel the action and return to the Accounting Favorites page.
**Default Schedule**

The **Default Schedule** option allows users to customize their work schedule for the accounting codes, projects, hours of work, and leave that they most commonly work. The default schedule will be generated each pay period as a base schedule for the employee to enter their T&A data. The default schedule can be modified or deleted as needed by the employee by selecting the **Pay Period Schedule** option to make changes applicable for that particular pay period or by selecting the **Default Schedule** option to make changes applicable for all future pay periods.
To Create a Default Schedule:

1. Select the Default Schedule component. The Default Schedule page is displayed.

![Default Schedule Page](image)

**Figure 126: Default Schedule Page**

2. Complete the fields as follows:

*Accounting Project Type Work/Leave* (see "Accounting Project Type Work/Leave Field Instruction" on page 170)
Daily Total (see "Daily Total Field Instruction" on page 177)

Start Time (see "Start Time Field Instruction" on page 192)

End Time (see "End Time Field Instruction" on page 185)

Accounting Favorites (see "Accounting Favorites Field Instruction" on page 170)

Type of Work (Transaction Code) (see "Type of Work (Transaction Code) Field Instruction" on page 195)

Work Descriptor (see "Work Descriptor Field Instruction" on page 195)

3. Select Add to add the selected T&A data to the default schedule.

    OR

Select Delete to delete the selected T&A data from the default schedule.

4. At this point, the following options are available:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Save.</td>
<td>To save the default schedule.</td>
</tr>
<tr>
<td>Select Cancel.</td>
<td>To cancel the action. A confirmation popup appears asking the user if they want to reset the current default schedule.</td>
</tr>
<tr>
<td>Select Delete Schedule.</td>
<td>To delete the default schedule.</td>
</tr>
</tbody>
</table>

Pay Period Schedule

The Pay Period Schedule option allows users to update their schedule each pay period with the accounting codes/projects stored in their favorites, types of work, and hours worked during the pay period. The pay period schedule can also be submitted to the timekeeper for verification and processing.

A pay period schedule with a status of "Owned by Employee" can be updated. A pay period schedule with a status of "Owned by Timekeeper" can no longer be updated by the employee.
To Enter a Pay Period Schedule:

1. Select the **Pay Period Schedule** component. The Pay Period Schedule page is displayed. If the user has a default schedule saved, the T&A data saved on the default schedule will appear on the pay period schedule.

![Pay Period Schedule Page](image)

**Figure 127: Pay Period Schedule Page**
2. Select the applicable pay period from the drop-down list.

3. Complete the fields as follows:

   **Accounting Project Type Work/Leave** (see "Accounting Project Type Work/Leave (Default) Field Instruction" on page 171)

   **Daily Total** (see "Daily Total Field Instruction" on page 177)

   **Tour of Duty**

   **Accounting Favorites** (see "Accounting Favorites Field Instruction" on page 170)

   **Type of Work (Transaction Code)** (see "Type of Work (Transaction Code) Field Instruction" on page 195)

   **Work Descriptor** (see "Work Descriptor Field Instruction" on page 195)

4. Select **Add** to add the selected T&A data to the pay period schedule.

   OR

   Select **Delete** to delete the selected T&A data from the default schedule.

5. At this point, the following options are available:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
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<tbody>
<tr>
<td>Select <strong>Save</strong></td>
<td>To save the pay period schedule.</td>
</tr>
<tr>
<td>Select <strong>Cancel</strong></td>
<td>To cancel the action.</td>
</tr>
<tr>
<td>Select <strong>Submit to Timekeeper</strong></td>
<td>To submit the T&amp;A data to the timekeeper for validation and processing.</td>
</tr>
<tr>
<td>Select <strong>Reset to Default</strong></td>
<td>To reset the T&amp;A data to the pay period schedule to the data on the default schedule.</td>
</tr>
<tr>
<td>Select <strong>Print-Friendly</strong></td>
<td>To display a printable version of the pay period schedule.</td>
</tr>
</tbody>
</table>

**Links**

The **Links** option provides users with useful links to various Web sites that contain information regarding career, retirement, taxes, etc. for Federal employees.
1. Select the **Links** component. The Useful Links page is displayed.

![Figure 128: Useful Links Page](image)

2. Locate the applicable subject and select the link for more information.
EPP Field Instructions/Descriptions

This section includes the following topics:

Account Nbr Field Instruction
Account Nbr (Allotment) Field Instruction
Account Nbr (Current) Field Instruction
Account Nbr (Displays) Field Instruction
Account Nbr (HSA) Field Instruction
Account Nbr (HSA Displays) Field Instruction
Account Nbr (New) Field Instruction
Accounting Cd/Description Field Instruction
Accounting Favorites Field Instruction
Accounting Project Type Work/Leave Field Instruction
Accounting Project Type Work/Leave (Default) Field Instruction
Accrued Field Instruction
Additional Amount To Be Withheld Each Pay Period Field Instruction
Additional Amount To Be Withheld Each Pay Period (State Tax) Field Instruction
Additional Deduction Amount Field Instruction
Additional Deduction Amount (Displays) Field Instruction
Additional 1 E-mail Address Field Instruction
Additional 2 E-mail Address Field Instruction
Advanced Balance Field Instruction
Agency PP Contribution Field Instruction
Agency Work E-mail Address Field Instruction
Allotment Amount Field Instruction
Allotment Amount (Current) Field Instruction
Allotment Amount (Data) Field Instruction
Allotment Amount (Displays) Field Instruction
Allotment Amount (HSA Displays) Field Instruction
Allotment Amount (New) Field Instruction
Amount Advanced Field Instruction
Annual Field Instruction
Authorization Nbr Field Instruction
Authorization Nbr (Voucher) Field Instruction
Balance Field Instruction
Bank Routing Nbr Field Instruction
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Account Nbr
Enter the bank account number.

Account Nbr (Allotment) Field Instruction

Account Nbr
Populates with the account number of the financial allotment.

Account Nbr (Current) Field Instruction

Account Nbr
Populates with the account number of the current financial allotment.
Account Nbr (Displays) Field Instruction

Account Nbr
Populates with the account number entered on the Direct Deposit Self-Service Request page.

Account Nbr (HSA) Field Instruction

Account Nbr
Enter the bank account number for the Health Savings Account.

Account Nbr (HSA Displays) Field Instruction

Account Nbr
Displays the bank account number for the Health Savings Account.

Account Nbr (New) Field Instruction

Account Nbr
Populates with the account number entered on the Enter Financial Allotment Self-Service Request page.

Accounting Cd/Description Field Instruction

Accounting Cd/Description
Select the accounting code from the drop-down list. The valid values will vary based on the user’s Agency.

Accounting Favorites Field Instruction

Accounting Favorites
Select the applicable accounting code for the drop-down list.

Note: Accounting codes/projects must be saved in the employee’s accounting favorites before they can be used on the default or pay period schedules.

Accounting Project Type Work/Leave Field Instruction

Accounting Project Type Work/Leave
Populates based on the selections from the Accounting Favorites and Type of Work (Transaction Code) fields. For each line of accounting, enter the applicable number of hours worked or leave used for the corresponding day.

**Accounting Project Type Work/Leave (Default) Field Instruction**

**Accounting Project Type Work/Leave**
Populates based on the selections from the Accounting Favorites and Type of Work (Transaction Code) fields.

**Accrued Field Instruction**

**Accr**
Displays the total amount of annual, sick, compensatory (comp), and other leave accrued for the pay period. This field can be changed for annual leave by clicking in the cell and entering the applicable accrual amount in the field, then press Enter.

**Additional Amount To Be Withheld Each Pay Period Field Instruction**

**Additional Amount to be Withheld Each Pay Period**
Enter the additional dollar amount to be withheld each pay period.

**Additional Amount To Be Withheld Each Pay Period (State Tax) Field Instruction**

**Additional Amount to be Withheld Each Pay Period**
Displays the additional amount to be withheld that was entered on the Enter State Tax Request page.

**Additional Deduction Amount Field Instruction**

**Additional Deduction Amount**
Enter the amount, in dollars and cents, of additional money to be withheld for Federal tax.

**Additional Deduction Amount (Displays) Field Instruction**

**Additional Deduction Amount**
Populates with the additional deduction amount entered on the Federal Tax Certificate (W-4) Self-Service Request page.
Additional 1 E-mail Address Field Instruction

Additional 1 E-mail Address
Enter the applicable email address to receive notifications from EPP.

Additional 2 E-mail Address Field Instruction

Additional 2 E-mail Address
Enter the applicable secondary email address to receive notifications from EPP.

Advanced Balance Field Instruction

Advanced Balance
Displays the balance of the amount advanced.

Agency PP Contribution Field Instruction

Agency PP Contribution
Displays the amount the Agency contributes each pay period towards the user's health benefits.

Agency Work E-mail Address Field Instruction

Agency Work E-mail Address
Enter the applicable Agency work email address to receive notifications from EPP.

Allotment Amount Field Instruction

Allotment Amount
Enter the allotment amount.

Allotment Amount (Current) Field Instruction

Allotment Amount
Populates with the allotment amount of the current financial allotment.

Allotment Amount (Data) Field Instruction

Allotment Amount
Populates with the allotment amount entered on the Enter Financial Allotment Self-Service Request page.
Allotment Amount (Displays) Field Instruction

Allotment Amount
Populates with the allotment amount of the financial allotment.

Allotment Amount (HSA Displays) Field Instruction

Allotment Amount
Populates with the allotment amount entered on the Enter Health Savings Account (HSA) Self-Service Request page.

Allotment Amount (New) Field Instruction

Allotment Amount
Enter the allotment amount in dollars and cents.

Amount Advanced Field Instruction

Amount Advanced
Displays the amount the user was advanced prior to travel.

Annual Field Instruction

Annual
Select the amount of annual leave used for the applicable day from the number box that appears after pressing in the cell.

Authorization Nbr Field Instruction

Authorization Nbr
Displays the travel authorization number.

Authorization Nbr (Voucher) Field Instruction

Authorization Nbr
Displays the travel authorization number associated with the travel voucher.

Balance Field Instruction

Balance
Displays the balance of Flexible Spending Account.

**Bank Routing Nbr Field Instruction**

Bank Routing Nbr  
Populates with the bank routing number of the financial allotment.

**Bank Routing Nbr (Current) Field Instruction**

Bank Routing Nbr  
Populates with the bank routing number of the current financial allotment.

**Bank Routing Nbr/Name Field Instruction**

Bank Routing Nbr/Name  
Enter the bank routing number. The bank routing number must be nine digits.

**Bank Routing Nbr/Name (Displays) Field Instruction**

Bank Routing Nbr/Name  
Populates with the bank routing number/name entered on the Direct Deposit Self-Service Request page.

**Bank Routing Nbr/Name (HSA) Field Instruction**

Bank Routing Nbr/Name  
Enter the bank routing number/name for the Health Savings Account.

**Bank Routing Nbr/Name (HSA Displays) Field Instruction**

Bank Routing Nbr/Name  
Displays the bank routing number/name for the Health Savings Account.

**Bank Routing Nbr/Name (New) Field Instruction**

Bank Routing Nbr/Name  
Populates with the bank routing number/name entered on the Enter Financial Allotment Self-Service Request page.
Basic Coverage Amount Field Instruction

**Basic Coverage Amount**
Populates with the basic dollar amount of coverage.

Change Contributions Field Instruction

**Change (start) Contributions**
Select this option to change (or start) the amount of the contributions.

City, State Field Instruction

**City, State**
Populates based on the ZIP Code entered.

Note: The field will not be updated until **Continue** is pressed.

Comp Field Instruction

**Comp**
Select the amount of compensatory (comp) leave used or earned for the applicable day from the number box that appears after pressing in the cell.

Confirm Account Nbr Field Instruction

**Confirm Account Nbr**
Reenter the bank account number.

Confirm Account Nbr (Displays) Field Instruction

**Confirm Account Nbr**
Populates with the account number entered on the Direct Deposit Self-Service Request page.

Confirm Account Nbr (HSA) Field Instruction

**Confirm Account Nbr**
Reenter the bank account number for the Health Savings Account.
Confirm Additional 1 E-mail Address Field Instruction

Confirm Additional 1 E-mail Address
Reenter the applicable email address to receive notifications from EPP.

Confirm Additional 2 E-mail Address Field Instruction

Confirm Additional 2 E-mail Address
Reenter the applicable email address to receive notifications from EPP.

Confirm E-mail Address Field Instruction

Confirm E-mail Address
Reenter the EPP Work Email Address that you wish to use to receive notifications from EPP.

Confirm E-mail Address (Secondary) Field Instruction

Confirm E-mail Address
Reenter the Additional 2 Email Address that you wish to use to receive notifications from EPP.

Confirm Enter E-mail Address Field Instruction

Confirm Enter E-mail Address
Reenter the Additional 1 Email Address that you wish to use to receive notifications from EPP.

Confirm EPP Work E-mail Address Field Instruction

Confirm EPP Work E-mail Address
Reenter the applicable EPP work email address to receive notifications from EPP.

Confirm New Password Field Instruction

Confirm New Password
Reenter the new password.

Confirm New Password (EPP) Field Instruction

Confirm New Password
Reenter the password that you are creating for EPP.
Confirm New User ID Field Instruction

Confirm New User ID
Reenter the new user ID.

Confirm New User ID (EPP) Field Instruction

Confirm New User ID
Reenter the user ID that you are creating for EPP.

Confirm W-2 Password Field Instruction

Confirm W-2 Password
Enter the W-2 password for confirmation.

Contributions Per Pay Period Field Instruction

Contributions Per Pay Period
Populates with the contributions per pay period entered on the Enter TSP Catch-Up Self-Service Request page.

Coverage Description Field Instruction

Coverage Description
Populates with a brief description of coverage.

Current Password Field Instruction

Current Password
Enter the current password.

Current User ID Field Instruction

Current User ID
Enter the current user ID.

Daily Total Field Instruction

Daily Total
Populates based on the values entered for each accounting favorite on each day of the work schedule.

**Date of Birth (MM/DD/YYYY) Field Instruction**

**Date of Birth**
Enter your date of birth using the following format MM/DD/YYYY.

**Date Processed Field Instruction**

**Date Processed**
Displays the date an action was processed for health benefits.

**Date Processed (Allotment) Field Instruction**

**Date Processed**
Populates with the process date of the financial allotment.

**Date Processed (Travel) Field Instruction**

**Date Processed**
Displays the date the authorization was processed.

**Date of Request Field Instruction**

**Date of Request**
Displays the date a request was entered.

**Dates of Travel Field Instruction**

**Dates of Travel**
Displays the dates of travel.

**Dates of Travel (Voucher) Field Instruction**

**Dates of Travel**
Displays the dates of travel associated with the travel voucher.
Daytime Phone Field Instruction

Daytime Phone
Enter the daytime phone number.

Daytime Phone (FEHB) Field Instruction

Daytime Phone
Displays the daytime phone number that was entered on the Enter FEHB Self-Service Request page.

Daytime Phone (User) Field Instruction

Daytime Phone
Displays the daytime phone number of the user.

Disability Field Instruction

Disability
Select the applicable disability code from the drop-down list. The valid values are as follows:
01 – Do Not Wish to Identify
02 – Development Disability
03 – Traumatic Brain Injury
05 – No Disability/Serious Health Condition
06 – Disability Not Listed
13 – Speech Impairments
19 – Deaf/Serious Difficult Hearing
20 – Blind/Serious Difficult Seeing
31 – Missing Extremities
40 – Significant Mobility Impairment
41 – Spinal Abnormalities
44 – Non-Paralytic Orthopedic Impairments
51 – HIV Positive/AIDS
52 – Morbid Obesity
59 – Nervous System Disorder
60 – Partial/Complete Paralysis
80 – Cardiovascular/Heart Disease
81 – Depress/Anxiety/Psych Disorder
82 – Epilepsy/Other Seizure Disorders
83 – Blood Diseases
84 – Diabetes
85 – Orthopedic/Osteoarthritis
86 – Pulmonary or Respiratory Conditions
87 – Kidney Dysfunction
Disability (Displays) Field Instruction

Disability
Displays the disability code selected on the Enter Disability Self-Service Request page.

Dollar Amount Field Instruction

Dollar Amount
Enter the dollar amount to be contributed if Change Contributions is selected for Type of Election.

Note: If this field is completed, leave the Percent of Basic Pay field blank

Dollar Amount (Catch-Up) Field Instruction

Dollar Amount
Displays if the Change Contributions field is selected. Enter the dollar amount of the contribution.

Dollar Amount (TSP) Field Instruction

Dollar Amount
Displays the dollar amount that was entered on the Enter TSP Self-Service Request page.

Dollar Amount (Type Work) Field Instruction

Dollar Amount
Enter the dollar amount when an applicable type of work is selected.
Effective Pay Period, Year Field Instruction

Effective Pay Period, Year
Displays the pay period and year the request will be effective.

Effective Pay Period, Year (Address) Field Instruction

Effective Pay Period, Year
Select the pay period and year from the drop-down list for this action to be processed.

Effective Pay Period, Year (Catch-Up) Field Instruction

Effective Pay Period, Year
Select the pay period and year the action is to be effective.

Effective Pay Period, Year (Catch-Up Displays) Field Instruction

Effective Pay Period, Year
Populates with the effective pay period/year selected on the Enter TSP Catch-Up Self-Service Request page.

Effective Pay Period, Year (Data) Field Instruction

Effective Pay Period, Year
Populates with the effective pay period selected on the Enter Financial Allotment Self-Service Request page.

Effective Pay Period, Year (DD/EFT) Field Instruction

Effective Pay Period, Year
Select the pay period and year the direct deposit is to be effective.

Effective Pay Period, Year (Disability) Field Instruction

Effective Pay Period, Year
Select the pay period and year the disability change is to be effective. The current processing pay period and year are populated by default.
Effective Pay Period, Year (Disability Displays) Field Instruction

Effective Pay Period, Year
Displays the effective pay period/year selected on the Enter Disability Self-Service Request page.

Effective Pay Period, Year (Displays DD/EFT) Field Instruction

Effective Pay Period, Year
Populates with the effective pay period/year selected on the Direct Deposit Self-Service Request page.

Effective Pay Period, Year (ERI) Field Instruction

Effective Pay Period, Year
Select the pay period and year the Ethnicity and Race Identification change is to be effective. The current processing pay period and year are populated by default.

Effective Pay Period, Year (ERI Displays) Field Instruction

Effective Pay Period, Year
Displays the effective pay period/year selected on the Enter Ethnicity and Race Identification (ERI) Self-Service Request page.

Effective Pay Period, Year (FEHB) Field Instruction

Effective Pay Period, Year
Displays the effective pay period and year that was selected on the Enter FEHB Self-Service Request page.

Effective Pay Period, Year (Gender) Field Instruction

Effective Pay period, Year
Select the pay period and year the gender change is to be effective. The current processing pay period and year are populated by default.

Effective Pay Period, Year (Gender Displays) Field Instruction

Effective Pay Period, Year
Displays the effective pay period/year selected on the Enter Gender Self-Service Request page.
Effective Pay Period, Year (Health) Field Instruction

Effective Pay Period, Year
Displays the pay period and year a health benefits action was effective.

Effective Pay Period, Year (History) Field Instruction

Effective Pay Period, Year
Populates with the pay period and year the financial allotment was effective.

Effective Pay Period, Year (HSA) Field Instruction

Effective Pay Period, Year
Select the pay period and year the request is to be effective.

Effective Pay Period, Year (HSA Displays) Field Instruction

Effective Pay Period, Year
Populates with the effective pay period and year selected on the Enter Health Savings Account (HSA) Self-Service Request page.

Effective Pay Period, Year (New) Field Instruction

Effective Pay Period, Year
Select the pay period and year the financial allotment is to be effective. The current processing pay period and year is populated by default.

Effective Pay Period, Year (PP Calendar) Field Instruction

Effective Pay Period, Year
Select the applicable pay period and year from the drop-down list that the change request is to be effective or select Pay Period Calendar link to select a pay period and year.

Effective Pay Period, Year (Residence) Field Instruction

Effective Pay Period, Year
Displays the pay period and year that was selected on the Enter Residence Address Self-Service Request page.
Effective Pay Period, Year (State Tax) Field Instruction

Effective Pay Period, Year
Displays the effective pay period and year that was selected on the Enter State Tax Request page.

Effective Pay Period, Year (Tax) Field Instruction

Effective Pay Period, Year
Select the pay period and year the tax request is to be effective.

Effective Pay Period, Year (TSP) Field Instruction

Effective Pay Period, Year
Select the pay period and year the action is to be effective.

Effective Pay Period, Year (TSP Displays) Field Instruction

Effective Pay Period, Year
Displays the effective pay period/year that was selected on the Enter TSP Self-Service Request page.

Effective Pay Period, Year (W-4) Field Instruction

Effective Pay Period, Year
Select the pay period and year the W-4 is to be effective. The current processing pay period and year is populated by default.

Effective Pay Period, Year (W-4 Displays) Field Instruction

Effective Pay Period, Year
Populates with the effective pay period/year selected on the Federal Tax Certificate (W-4) Self-Service Request page.

Employee PP Deduction Field Instruction

Employee PP Deduction
Displays the amount deducted each pay period for health benefits.
Employee YTD Deduction Field Instruction

Employee YTD Deduction
Displays the amount deducted year to date (YTD) for health benefits.

End Time Field Instruction

End Time
Enter the time the tour of duty ends for the corresponding workday.

Ending Balance Field Instruction

Ending Balance
Displays the ending balance of annual, sick, compensatory (comp), and other leave for the pay period.

Enter E-mail Address Field Instruction

Enter E-mail Address
Enter the Additional 1 Email Address that you wish to use to receive notifications from EPP.

Enter Work E-mail Address Field Instruction

Enter Work E-mail Address
Enter the EPP Work Email Address that you wish to use to receive notifications from EPP.

Enter Secondary E-mail Address Field Instruction

Enter Secondary E-mail Address
Enter the Additional 2 Email Address that you wish to use to receive notifications from EPP.

Multiple Jobs or Spouse Works Field Instruction

Multiple Jobs or Spouse Works
Select the check box if there are two jobs total. This includes if you have more than one job, or if you are married filing jointly, and you and your spouse both have a job.

EPP Work E-mail Address Field Instruction

EPP Work E-mail Address
Enter the applicable EPP work email address to receive notifications from EPP.

**ERI Field Instructions**

<table>
<thead>
<tr>
<th>ERI</th>
<th>Displays the ERI code selected from the Enter Ethnicity and Race Identification (ERI) Self-Service Request page.</th>
</tr>
</thead>
</table>

**Female Field Instruction**

*Female*
Select this option if the gender is female.

**Filing Status Field Instruction**

*Filing Status*
Select the applicable filing status. The valid values are:
- Single or Married filing separately
- Married filing jointly (or Qualifying widow(er))
- Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual)
- Exempt from withholding

**Filing Status (Displays) Field Instruction**

*Filing Status*
Populates with the filing status selected on the Federal Tax Certificate (W-4) Self-Service Request page.

**Gender Field Instruction**

*Gender*
Displays the gender selected on the Enter Gender Self-Service Request page.

**Line Totals Field Instruction**

*Line Total*
Populates with the total hours entered for each line of accounting.
Street Address Line 1 Field Instruction

Street Address Line 1
Enter the first line of the street address.

Claim Dependents Field Instruction

Claim Dependents
Compute the applicable dollar amount and enter it in the applicable field.

Street Address Line 2 Field Instruction

Street Address Line 2
Enter the second line of the street address, if applicable.

Street Address Line 3 Field Instruction

Street Address Line 3
Enter the third line of the street address, if applicable.

(Optional) Other Adjustments Field Instruction

(Optional) Other Adjustments
Complete the fields if applicable.

Male Field Instruction

Male
Select this option if the gender is male.

Married? Field Instruction

Married?
Displays the marital status of user.

Married? (FEHB) Field Instruction

Married?
Displays the marital status that was selected on the Enter FEHB Self-Service Request page.
**Married? (Value) Field Instruction**

Married?
Select the applicable marital status. The valid values are **No** and **Yes**.

**Net to Traveler Field Instruction**

Net to Traveler
Displays the total amount disbursed to the user for the specified travel dates.

**New Password Field Instruction**

New Password
Enter the new password.

**New Password (EPP) Field Instruction**

New Password
Enter the password that you are creating for EPP.

**New User ID Field Instruction**

New User ID
Enter the new user ID.

**New User ID (EPP) Field Instruction**

New User ID
Enter the user ID that you are creating for EPP.

**Number of Exemptions Field Instruction**

Number of Exemptions
Enter the number of exemptions being claimed.

**Number of Exemptions (Displays) Field Instruction**

Number of Exemptions
Populates with the number of exemptions entered on the Federal Tax Certificate (W-4) Self-Service Request page.
My Leave Field Instruction

My Leave
My Leave 1
My Leave 2
Select the amount of other leave used or earned for the applicable day from the number box that appears after selecting in the cell. Change the name of the field from My Leave, My Leave 2, or My Leave 3 to the applicable type of leave.

Password (Sign Up Letter) Field Instruction

Password
Enter the password provided in your EPP sign up letter.

Password Field Instruction

Password
Enter the password. If unsuccessful, a message will appear stating that the user ID or password entered is invalid.

Pay Period Amount Field Instruction

Pay Period Amount
Displays the amount contributed to the Flexible Spending Account in each pay period.

Percent of Basic Pay Field Instruction

Percent of Basic Pay
Enter the percent of basic pay to be contributed if Change Contributions is selected for Type of Election.

Note: If this field is completed, leave the Dollar Amount field blank.

Contributions Per Pay Period (TSP) Field Instruction

Contributions Per Pay Period
Displays the percent of basic pay that was entered on the Submit TSP Self-Service Request page.
Plan Code/Description Field Instruction

Plan Code/Description
Displays the name and code of the current health benefits.

Plan Code/Name Field Instruction

Plan Code/Name
Displays the name and code of the health benefits.

Plan Code/Name (Displays) Field Instruction

Plan Code/Name
Displays the plan code and name of the health benefits included in the change request.

Plan Code/Name (FEHB) Field Instruction

Plan Code/Name
Displays the plan code and name of the health benefits included in the change request.

Plan Field Instruction

Plan
Displays the name of Flexible Spending Account plan.

Plan Name Field Instruction

Plan Name
Displays the name of the life insurance plan.

PP Total Field Instruction

PP Total
Displays the total amount of annual, sick, compensatory (comp), and other leave used for the pay period.

Premium Conversion Field Instruction

Premium Conversion
Displays whether or not the user has pre-tax premiums.

Note: If the employee answers "no" in this field, there are tax consequences resulting in their FEHB being taxed.

Project Field Instruction

Project
Enter the project number or description for the accounting code selected in the previous field.

Residence Address Field Instruction

Residence Address
Displays the address that was entered on the Enter Residence Address Self-Service Request page.

Select One or More ERI Codes That Applies Field Instruction

Select One or More ERI Code That Applies
Check the box(es) of the applicable race(s). Valid values are:
Hispanic or Latino
American Indian or Alaska Native
Asian
Black or African-American
Native Hawaiian or Other Pacific Islander
White

Select Year Field Instruction

Select Year
Select the appropriate year you are trying to find.

Sick Field Instruction

Sick
Select the amount of sick leave used for the applicable day from the number box that appears after selecting in the cell.

Social Security No. Field Instruction

Social Security No.
Enter your nine-digit Social Security number (SSN).

**Start Time Field Instruction**

**Start Time**
Enter the time the tour of duty begins for the corresponding workday.

**Starting Balance Field Instruction**

**Starting Balance**
Displays the starting leave balances at the beginning of the pay period.

**Status Field Instruction**

**Status**
Displays the status of the change for the health benefits. The valid values are as follows:
- **Pending** - The document has been entered into Employee Self-Service (ESS) but has not been sent for editing by the Personnel Input and Edit System (PINE). It can be modified or deleted by the employee.
- **In Process** - The document has been submitted to PINE and will be edited in the next pass. It cannot be modified or deleted by the employee.
- **Processed/Future** - The document has been edited by PINE and is in the future file. It cannot be modified or deleted by the employee. The employee must contact their servicing personnel office to have it modified or deleted.
- **Processed/Error** - The document failed PINE edits and is in suspense. The employee must contact their servicing personnel office to have it corrected or deleted.
- **Processed/Complete** - The document has been applied to the Payroll/Personnel database. No action can be taken to change or delete this document. The employee can verify the change in EPP.

**Status (Allotment) Field Instruction**

**Status**
Populates with the status of the financial allotment. The valid values are as follows:
- **Pending** - The document has been entered into Employee Self-Service (ESS) but has not been sent for editing by the Personnel Input and Edit System (PINE). It can be modified or deleted by the employee.
- **In Process** - The document has been submitted to PINE and will be edited in the next pass. It cannot be modified or deleted by the employee.
- **Processed/Future** - The document has been edited by PINE and is in the future file. It cannot be modified or deleted by the employee. The employee must contact their servicing personnel office to have it modified or deleted.
**Processed/Error** - The document failed PINE edits and is in suspense. The employee must contact their servicing personnel office to have it corrected or deleted.

**Processed/Complete** - The document has been applied to the Payroll/Personnel database. No action can be taken to change or delete this document. The employee can verify the change in EPP.

### Stop Contributions Field Instruction

**Stop Contributions**
Select this option to stop all contributions.

### Total Amount Field Instruction

**Total Amount**
Displays the total amount of contribution to the Flexible Spending Account.

### Type of Account Field Instruction

**Type of Account**
Select the type of bank account. Valid values are *Checking* and *Savings*.

### Type of Account (Allotment) Field Instruction

**Type of Account**
Populates with the type of account of the financial allotment.

### Password (Sign Up Letter) Field Instruction

**Password**
Enter the password provided in your EPP sign up letter.

### Type of Account (Current) Field Instruction

**Type of Account**
Populates with the type of account of the current financial allotment.

### Type of Account (Data) Field Instruction

**Type of Account**
Populates with the type of account selected on the Enter Financial Allotment Self-Service Request page.

**Type of Account (Displays) Field Instruction**

**Type of Account**
Populates with the type of account entered on the Direct Deposit Self-Service Request page.

**Type of Account (New) Field Instruction**

**Type of Account**
Populates with **New** to reflect the action selected on the Financial Allotment Change Request page.

**Type of Change Field Instruction**

**Type of Change**
Displays the type of change that was made to the health benefits.

**Type of Election Field Instruction**

**Type of Election**
Select the applicable type of action to be taken. Valid values are **Start Contributions**, **Change Contributions**, and **Stop Contributions**.

**Type of Election (Catch-Up) Field Instruction**

**Type of Election**
Populates with the type of election selected on the Enter TSP Catch-Up Self-Service Request page.

**Type of Election (TSP) Field Instruction**

**Type of Election**
Displays the type of election that was selected on the Enter TSP Self-Service Request page.

**Type of Request Field Instruction**

**Type of Request**
Populates with the self-service action being taken which reflects the action selected on the Health Savings Account (HSA) Allotment Self-Service Request page.

**Type of Request (Allotment) Field Instruction**

**Type of Request**
Populates with action taken on the financial allotment.

**Type of Request (HSA) Field Instruction**

**Type of Request**
Populates with the self-service action being taken which reflects the action selected on the Health Savings Account (HSA) Allotment Self-Service Request page.

**Type of Request (New) Field Instruction**

**Type of Request**
Populates with *New* to reflect the action selected on the Financial Allotment Change Request page.

**Type of Work (Transaction Code) Field Instruction**

**Type of Work (Transaction Code)**
Select the applicable transaction code for the type of work entered or leave used from the drop-down menu.

**User ID (Sign Up Letter) Field Instruction**

**User ID**
Enter the user ID provided in your EPP sign up letter.

**User ID Field Instruction**

**User ID**
Enter the user ID.

**Work Descriptor Field Instruction**

**Work Descriptor**
Select the applicable (if any) work descriptor. Valid Values are **FMLA**, **OWCP (Illness)**, and **OWCP (Injury)**.

**W2 Password Field Instruction**

**W2 Password**
Enter the W-2 password to be used to import W-2 data into a tax filing software.

**Zip Code Field Instruction**

**Zip Code**
Enter the five-digit ZIP Code.

**Zip Code (Optional) Field Instruction**

**Zip Code (Optional)**
Enter the optional ZIP+4 Code.
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No index entries found.