

## 提供商电子服务门户(ESP)

PROVIDER ELECTRONIC SERVICE PORTAL (ESP)

### ESP财务设置与审核

ESP Financial Setup and Review

### 您可以在ESP上做什么?WHAT CAN YOU DO ON ESP?

- 签到/离职 Check-In/Out
- 提交时间表 Submit Timesheet
- 住家证明 Live-in Certification
- 工资记录 Payroll History
- 就业证明Employment Verification
- 审核税务文件
  Review Tax Documents

- 病假申请 Sick Leave Request
- 直接存款 Direct Deposit
- 更新您的联系信息
  Update Your Contact Information
- 资源链接 Link to Resources
- 阅读关于*ESP*的通知
  Read Notifications About the ESP



### 在本课程中:

IN THIS COURSE:

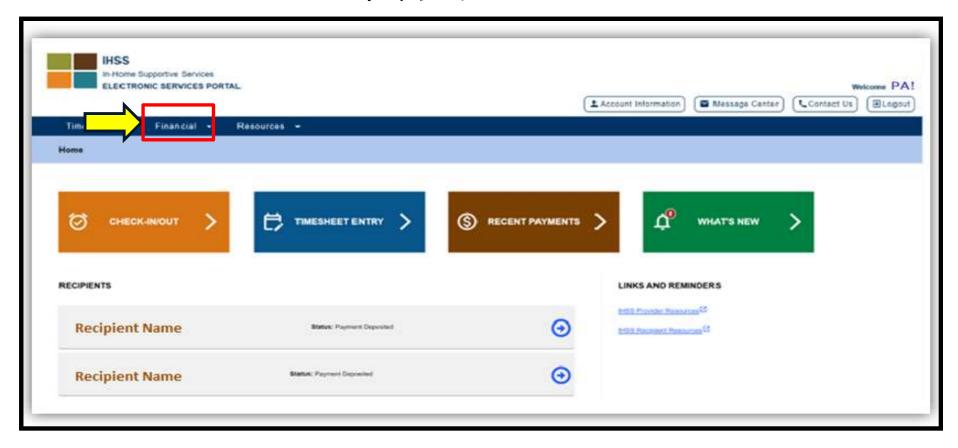
- 在本课程结束时,您将了解如何:
  By the end of this course, you will know how to:
  - o 确认住家提供者身份 Certify Live-in status
  - o 查看工资历史记录 View payroll history
  - 。 设置和更改直接存款
    Set up and change direct deposit
  - 查看税务文件 View tax documents
  - o 请求就业证明
    Request employment verification





by Sourcewise

### HOMEPAGE



- 登录账户后,您将看到首页 After you log in to your account, you will see the homepage
- 在本课程中,我们将查看"财务"(Financial)标签 In this course, we will be looking at the tab for "Financial"

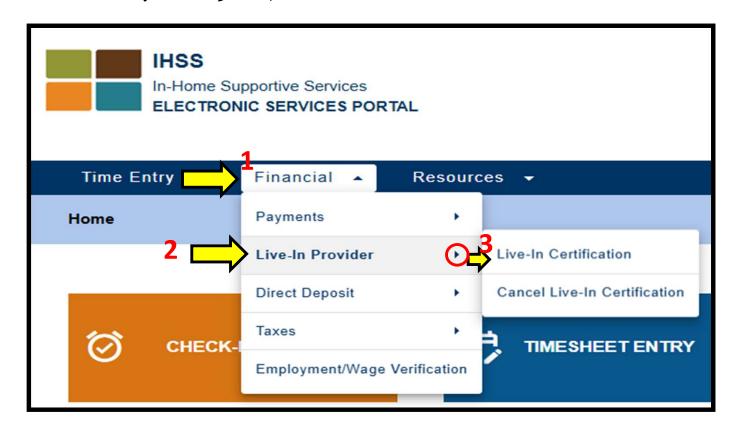


- 如果您<u>与</u>服务对象同住,您属于住家提供者,无需每日打卡签到/签退 If you live with your consumer, you are a Live-in Provider and do not need to check-in and out daily
  - 。 填写 SOC 2298 表格(将表格提交至所在县 IHSS 办公室) 或通过 ESP确认与服务对象同住 Complete the form SOC 2298 (submit it to your county IHSS office) or use the ESP to certify that you live with your recipient
  - 。 若未证明您的住家提供者身份,系统将在每个考勤周期开始 时询问您是否与服务对象同住 If you do not certify your Live-in status, you will be asked if you live with your consumer at the beginning of each timesheet period
- 如需更多信息,请访问加州社会服务部网站 <u>cdss.ca.gov/inforesources/ihss/live-in-provider-self-</u> <u>certification</u> For more information, please visit the California Department of Social Services
- 若您未与服务对象同住,请跳过以下说明
  If you do not live with your care recipient, please skip the following Live-In certification instructions
  - o 跳至视频第11页或3:58 Skip to page #11 or 3:58 in the video



### Public Authority Services by Sourcewise

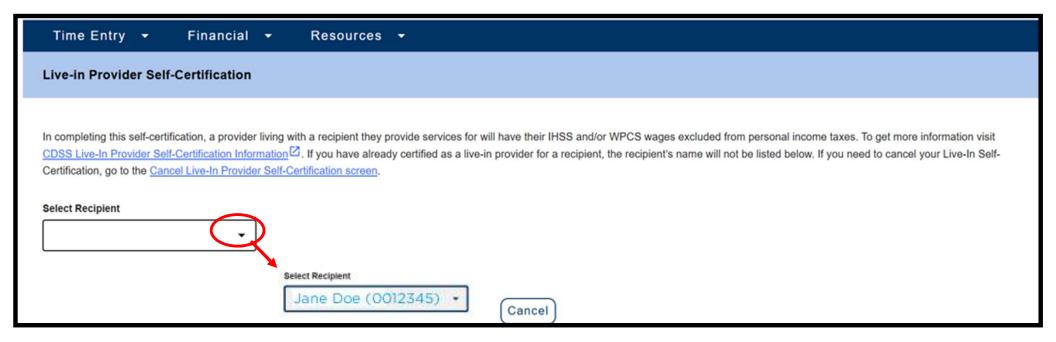
## 住家认证 LIVE-IN CERTIFICATION



要证明您的住家状态,请在顶部找到"财务"(1 Financial),然后 点击"住家提供者"(*2 Live-In Provider*),并选择"住家认证"*(3* Live-In Certification)

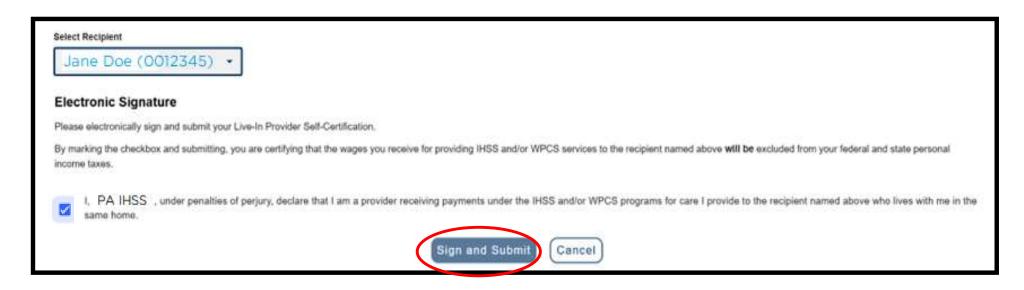
To certify your live-in status, on the top, find the tab for "Financial" (1), then click on "Live-In Provider" (2) and choose "Live-In Certification" (3)





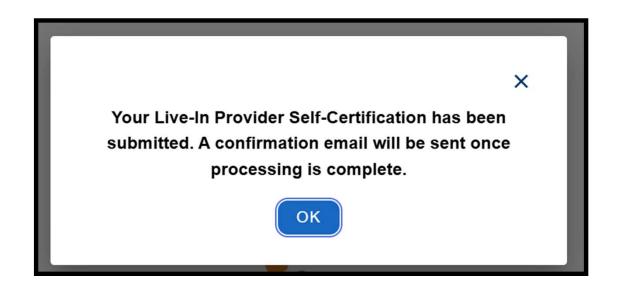
- 在"选择受照顾者"(Select Recipient)下,点击带有下拉箭头 的字框 Under "Select Recipient", click the drop-down arrow in the empty box
- 您将看到所有您关联且有资格自行证明住家状态的受照顾者 You will then see all recipients you are connected to and are eligible to self-certify your live-in status
- 找到您要证明住家状态的受照顾者,并点击其姓名 Find the recipient you are certifying your live-in status for and click on their name
  - © Sourcewise. All Rights Reserved.





- 选择要证明的受照顾者后,请核对"电子签名" (Electronic Signature) 下的信息,然后点击方框 After selecting the recipient you wish to certify for, review the information below "Electronic Signature", and then click on the square checkbox
- 方框内将出现勾选标记 It will then have a checkmark
- 随后点击"签名并提交"(Sign and Submit) Then click "Sign and Submit"





- ESP 门户将显示您已提交住家证明请求的通知
  The ESP portal will display a notification that you have submitted your Live-In request
  - o 待处理并批准后,您将收到一封邮件 Once it is processed and approved, you will receive a confirmation email
- 点击"确定" (OK) click "OK"



# 住家认证(取消)

LIVE-IN CERTIFICATION (CANCEL)



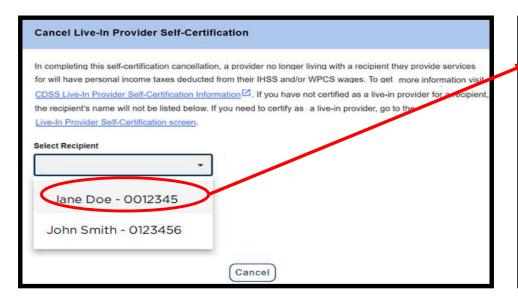
- 如果您希望取消住家证明,也可随时在ESP中提交取消请
  If you wish to cancel your Live-in Certification, you can also put the request in on the ESP at any time
- 求要取消住家证明,请在顶部找到"财务"(1 Financial),然后点击 "住家保姆"(2 Live-In Provider)并选择"取消住家证明"(3 Cancel Live-In Certification)

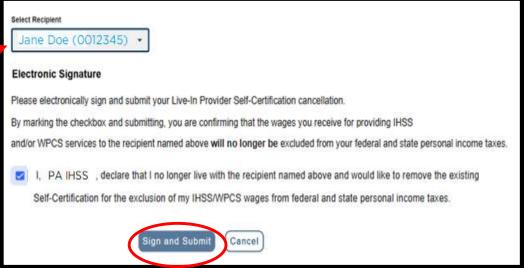
To cancel your live-in status, on the top, go to the "Financial" tab (1), then click on "Live-In Provider" (2) and choose "Cancel Live-In Certification" (3)



# 住家认证(取消)。

### LIVE-IN CERTIFICATION (CANCEL)



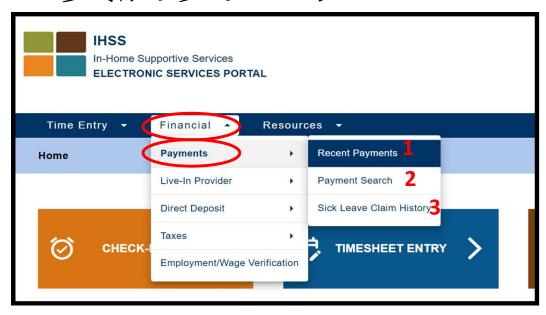


- 选择您想要取消认证的收件人,查看"电子签名"(Electronic Signature)下的信息,然后点击方框 Select the recipient you wish to cancel certification for, review the information under "Electronic Signature," and then click on the square box
- 声明旁边会出现一个复选标记 A checkmark will appear next to the statement
- 现在您可以点击"签名并提交"(Sign and Submit)
  You can now click "Sign and Submit"
- 您将收到电子邮件通知,告知您的请求已处理完毕 You will be notified by email that your request has been processed



### Public Authority Services by Sourcewise

## 一次万史记录 PAYROLL HISTORY

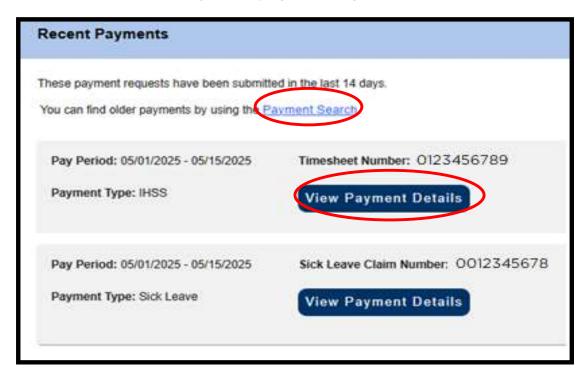


- 要查看付款历史记录,请前往"财务"(Financial),然后依次选择"付 款"(Payments),并点击以下选项:
  - To view payment history, go to "Financial," then, "Payments", and click on the option below:
    - 近期付款 (1 Recent Payments): 查看过去 14 天内提交的付款请求 For payment requests that have been submitted in the last 14 days
    - 款搜索 (2 Payment Search): 查看之前的付款请求 For older payment requests
  - 病假申请历史记录 (3 Sick Leave Claim History): 仅查看病假申请和付款的历史记录 For the history of sick leave requests and payments only



### 工资历史记录:最近付款(7)

PAYROLL HISTORY: RECENT PAYMENT



 您可以在此处查看过去 14 天内提交的所有付款请求的简要 摘要

A quick summary of any payment request submitted in the last 14 days can be found here

■ 点击"查看付款详情"(View Payment Details)可查看工时 表的详细视图 Click on "View Payment Details" for a detailed view of the timesheet



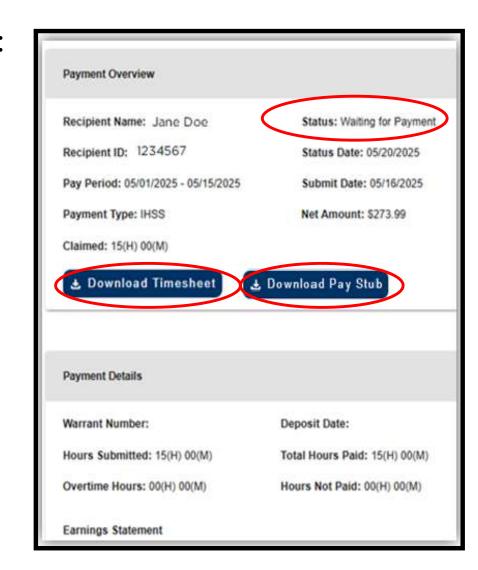
### Public Authority Services by Sourcewise

### 工资历史记录:最近付款(1)

PAYROLL HISTORY: RECENT PAYMENT

- 您可以在以下阶段查看考勤表状态:
  The status of your timesheet will be in one of these stages:
  - 己提交 (Submitted)
  - o 待收件人审核 (Waiting Recipient Review)
  - o 待发薪 (Waiting for Payment)
  - o 薪水已到账 (Payment Deposited)
- 当您的考勤表或工资单处于 "待发薪" (Waiting for payment)状态时,您可以下载它。点击"付款概览" (Payment Overview)中的蓝色按钮即可下载

You can download your timesheet or pay stub once it is in the "Waiting for payment" status. Do so by clicking the blue buttons in "Payment Overview"





### 工资历史记录:发薪搜索 (2)

PAYROLL HISTORY: PAYMENT SEARCH (2)



- 您可在此处查找之前的发薪请求 You can find previous payment requests here
- 选择您想要查看的期间的第一天
  Choose the first date of the period that you want to review
  - 。 IHSS有两个发薪周期 IHSS has two pay periods
    - □ 1日至15日 From the 1st to the 15th
    - □ 16日至月底
      From the 16<sup>th</sup> to the end of the month
  - o 点击日期,然后点击"搜索" (Search) Click on the date, then click "Search"

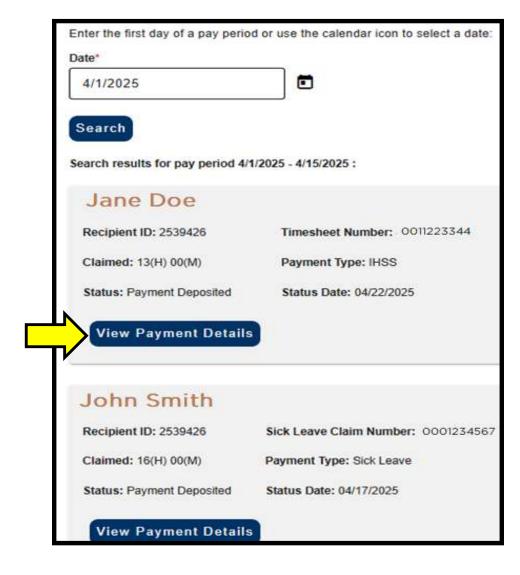


### Public Authority Services by Sourcewise

## 工资历史记录:发薪搜索 (2)

PAYROLL HISTORY: PAYMENT SEARCH (2)

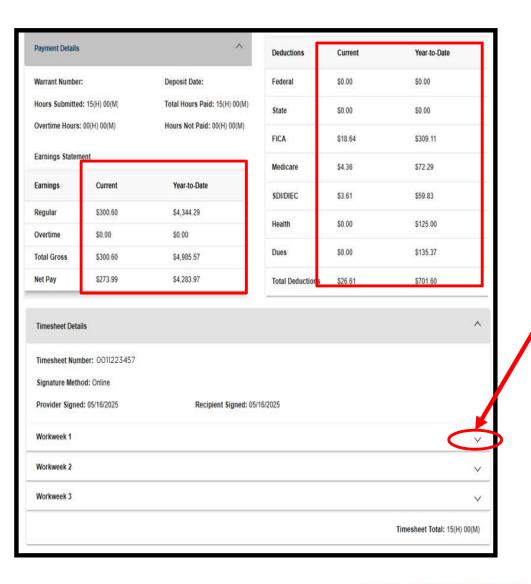
• 您可以选择"查看付款详情"(View Payment Details)来查看有关此付款期的更多详情 You can see more details about this pay period by selecting "View Payment Details"





### 工资历史记录:发薪搜索 (2)

PAYROLL HISTORY: PAYMENT SEARCH (2)

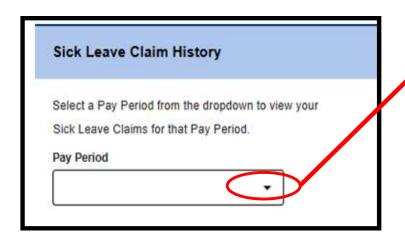


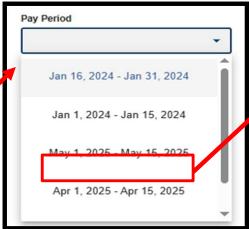
- \* 在 "近期发薪"或 "发薪搜索" (Recent Payment)下的 "发薪概述" (Payment Search)中,您可以通过点击下拉箭头详细查看提交的考 勤表 In the "Recent Payment" or "Payment Search", under Payment Overview, you can review the timesheet you submitted in detail by clicking on the down arrow
- 您还可以在两种发薪搜索选项中下载考勤表 You can also download the timesheet on both payment search options



### 工资历史记录:病假申请历史记录(3)

PAYROLL HISTORY: SICK LEAVE CLAIM HISTORY (3)







- 您可以在"病假索赔历史"(Sick Leave Claim History)下查看病假付款的历史记录 You can see the history of sick leave payments under "Sick Leave Claim History"
- 点击"工资期" (Pay Period)下方的空白框。您将看到过去领取病假工资的工资期 Click on the empty box under "Pay Period". You will then see past pay periods during which you received sick pay
  - 找到并点击您想要查看的工资期 Find and click on the pay period you wish to review
- 您将看到病假工资的汇总。如需查看详细汇总,请点击"查看病假工资详情"(View Sick Leave Claim Details)

You will then see a summary of the sick payment. For a detailed summary, click on "View Sick Leave Claim Details"

○ 您无法下载病假索赔You cannot download sick leave claims



## 直接存款 DIRECT DEPOSIT

服务提供者无法收到纸质工资单。服务提供者必须使用直接存款或充值支付卡来接收付款

Providers cannot receive paper paychecks. Providers are required to use direct deposit or a loaded pay card to receive their payments

欲了解更多信息,请访问 For more information, visit:
 <u>cdss.ca.gov/inforesources/ihss-</u>
 <u>providers/resources/direct-deposit</u>

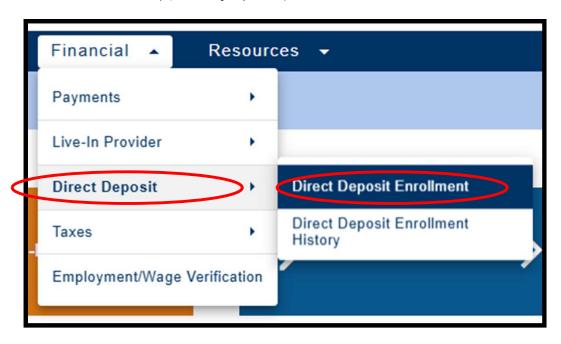


- 有两种方式可以注册直接存款 There are two ways to enroll in direct deposit
  - o 填写SOC 829表格并提交给IHSS Fill out form SOC 829 and submit it to IHSS
  - 。 通过ESP,您可以注册并更改您的直接存款 Through the ESP, you can enroll and change your direct deposit
    - □ 转到"财务"(Financial)选项卡,然后转到"直接存款"(Direct Deposit) Go to the "Financial" tab, then "Direct Deposit"
- 服务提供者必须为其服务的每位受助人注册直接存款 Providers must enroll in Direct Deposit for each recipient they work for



### Public Authority Services by Sourcewise

## 直接存款 DIRECT DEPOSIT



■ 要注册直接存款,请找到"财务"(Financial),然后 找到"直接存款"(Direct Deposit),然后单击"直接 存款注册"(Direct Deposit Enrollment)

To enroll in direct deposit, locate "Financial", then "Direct Deposit", and click on "Direct Deposit Enrollment"

· 然后,您将被要求完成一次性验证 You will then be asked to complete a one-time verification



## 直接存款 DIRECT DEPOSIT

### **Action Requires Verification Code** To enroll in or change your direct deposit, we must first send you a one-time verification code. If you select "Email me," the verification code will be sent to your email address. If you select "Text me," the verification code will be sent to your cell phone number. You may be charged a text messaging fee from your mobile service provider. For more information please view our SMS Terms Of Service and Privacy Policy. If you select "Call me," the verification code will be verbally provided to you in an automated telephone call to your primary telephone number. The verification code will expire 10 minutes after being sent, so be sure you have access to your email or phone. Select your verification option Email me at q\*\*\*@yah\*\*\* Text me at \*\*\*-\*\*\*-5056 Call me at \*\*\*-\*\*\*-5056 Cancel Request Send Verification Code

- 您可选择通过电子邮件、 短信或电话接收验证码。 You can choose to receive your code through email, text, or call
- 选择验证方式后,点击 "发送验证码" (Send Verification Code)

Select your verification option, then click the "Send Verification Code" button



## 直接存款 DIRECT DEPOSIT



- 收到验证码后,将其输入空框并点击"验证"(Verify)
  Once you receive your verification code, enter it into the empty box and click "Verify"
  - 该代码将在10分钟后失效The code will expire after 10 minutes
- 若未收到验证码,可点击"重新发送验证码"(Resend Code)按钮重新发送 If you have not received the code, you can have it resent to you by clicking the "Resend Code" button

## 直接存款 DIRECT DEPOSIT

### **Direct Deposit Enrollment**

To prevent fraudulent transactions this system captures and tracks system information about the users who add or make changes to their Direct Deposit accounts. If you do not want your information to be recorded, please complete and mail the IHSS Provider Direct Deposit Enrollment/Change/Cancellation Form (SOC 829).

Please select one of the options below to begin. Select **NEW** to enroll in Direct Deposit, **CHANGE** to change your Direct Deposit Account, or **CANCEL** to stop receiving Direct Deposit. You will need your Account Number and Routing Number to request a new or change an existing Direct Deposit. After selecting a Direct Deposit Option, an authorization checkbox will be displayed. Select the authorization checkbox to confirm your option and select Next to continue. To learn more about Direct Deposit, visit <u>Direct Deposit FAQ (PDF)</u>.

### Salect Your Direct Deposit Option

- NEW Enroll in Direct Deposit
- CHANGE Change Direct Deposit Account
- CANCEL Cancel Direct Deposit

### Authorization

PA IHSS , hereby authorize the State Controller's Office to directly deposit my pay warrants to my personal bank account.

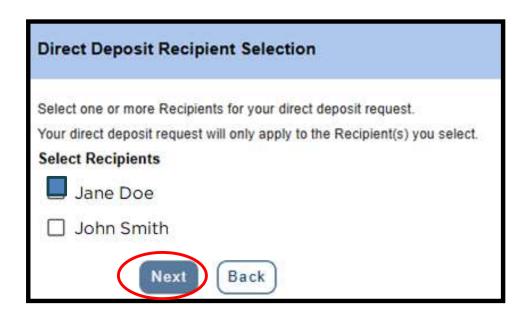


Cancel

- 若您开始为新受照顾者工作,需注册直接存款。点击"新"(New)旁边的圆圈,然后点击"下一步"(Next)
  - If you started working for a new recipient, you will need to enroll for direct deposit. Click the circle next to "New," then the authorization box, and then click "Next"
- 如果要切换到其他银行账户,请点击"更改"(Change)旁边的圆圈、授权框,然后点击"下一步"(Next)
  - If you want to switch to a different bank account, you will click on the circle next to "Change," the authorization box, and then "Next"
- 如果您想取消直接存款,请点击"取消"(Cancel)旁边的圆圈然后点击"下一步"(Next) If you wish to cancel your direct deposit, you will click on the circle next to "Cancel," the authorization box, and then "Next"
  - © Sourcewise. All Rights Reserved.



## 直接存款 DIRECT DEPOSIT



- 选择您要为其注册、更改或取消直接存款的受照 顾者 Select the recipient(s) you would like to enroll, change, or cancel your direct deposit for
  - o 如果您为多个受照顾者工作,您需要选择要为其 设置直接存款的所有受照顾者 If you work for more than one recipient, you will need to select all recipients you would like to set up the direct deposit for



# 直接存款 DIRECT DEPOSIT

### **Direct Deposit Instructions**

- Begin by selecting the Type of Account then enter your routing number and account number found on your personal check. The Bank Name will display based on the Routing Number you enter.
- Entering an incorrect routing number or account number will cause your Direct Deposit to be rejected.
- . The routing number is 9 digits long and starts with 0, 1, 2 or 3.
- · The account number must be between 4 and 17 digits.
- Do not use a deposit slip to provide this information because the numbers can be different than your account and cause your Direct Deposit request to be rejected.
- If you need help finding your routing number and account number, please contact your tank.
- Your routing number and account number may be different if you choose to use your savings
  account for Direct Deposit.
- . Below is an example of a check that shows where you can find this information.

### Check Example:

Your Name			Check NO. 4444
Pay to the Order of			
11121456781:	5765432109812	4444	

### Enter Your Bank Information

### Type of Account:

0	Checking
0	Savings

### ■ 查看直接存款说明

Review the direct deposit instructions

- 继续操作前,您需要准备好银行路由号码和账户号码
   You will need your routing and account numbers before setting up Direct Deposit
- o 您可以在空白支票上找到此信息,也可以从银行获取 You can find this information on a blank check or get it from your bank
- 在 "账户类型" (Type of Account)下选择您的银行账户类型

Choose your banking account type, under "Type of Account"



## 直接存款 DIRECT DEPOSIT



You will continue to receive paper checks by mail until your Direct Deposit account has been established. Please note, it can take up to 30 calendar days after the date of your request to start Direct Deposit with your bank. You will receive an email with more information.

Click the Sign and Submit button to electronically sign your request and submit it for processing.

I, PA IHSS agree to the terms above.

Sign and Submit Cancel Submit

- · 输入您的路由号码和账户号码 Enter your routing number and account number
  - o 您需要输入账户号码两次 You will need to enter your account number twice
- 填写路由号码和账户号码后,"银行名称" (Bank Name)将自动显示 After entering your account numbers, your "Bank Name" will appear automatically
- 确认信息后点击"下一步"(Next) 按钮

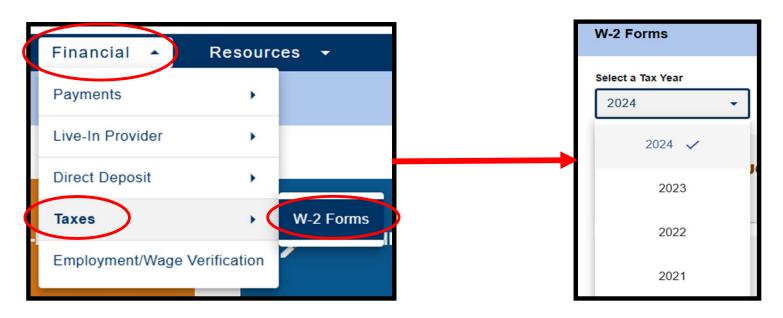
Confirm the information before clicking the "Next" button

- 核对信息,勾选方框以确认条款,然后点击"签名并提交"(Sign and Submit)
  Review the information, click on the square box to acknowledge the terms, and click "Sign and Submit"
  - 。 直接存款可能需要长达30个日历日 才能到账。在此期间,您将继续收 到纸质支票,直至直接存款设置完

It can take up to **30 calendar days** after your request for direct deposit to begin. You will continue to receive paper checks until the direct deposit has gone through



### 税收 TAXES

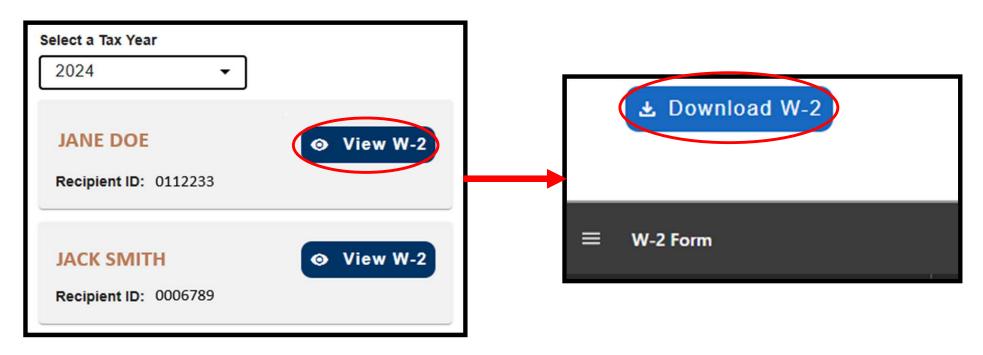


- 要查找*W-2*表格,请进入"财务"(Financial)选项,然后查找 "税务"(Taxes)并点击"*W-2* 表格"(*W-2 Forms*)

  To find your W-2, go to the "Financial" tab, then look for "Taxes" and click on "W-2 Forms"
- 您将看到最近一年的W-2 You will see the most recent year's W-2
  - 您将首先看到上一年度的*W-2*,如需查看更早年度的*W-2*,请点击 "选择纳税年度" *(Select a Tax Year)*下方的下拉箭头,然后选择 您要查看的年份 To see an earlier year's W-2, click on the drop-down arrow in the "Select a Tax Year" box, then click on the year you would like to review



### 税收 TAXES



- 如果您有多个受照顾者,请点击其姓名右侧的"查看W-2" (View W-2)以选择要查看W-2 的受照顾者 If you have more than one recipient, choose the recipient you would like to view the W-2 for by clicking on "View W-2" to the right side of their name
- 您可以直接在线查看*W-2*,或点击"下载 *W-2" (Download W-2)* 将副本保存至设备

You can directly view your W-2 online or click the "Download W-2" button to save a copy on your device



REQUEST EMPLOYMENT VERIFICATION



- IHSS提供者可在线申请就业及工资验证
  IHSS Providers can request employment and wage verification through the ESP
- 找到"财务" (Financial)选项,点击"就业/工资验证" (Employment/wage verification)

Go to the "Financial" tab and click on "Employment/wage verification"

■ 在下一页,您可以申请新的验证或下载以往申请记录 On the next page, you can request a new verification or download past request

REQUEST EMPLOYMENT VERIFICATION

### ← Request Employment/Wage Verification

Select Employment Verification Letter to generate a letter confirming your employment status. Select Employment Verification Letter and Wage Verification to generate a letter confirming your employment status including wage information.

- · Enter a Start Date and End Date.
- Payments Issued to you in the Date range you enter will be included with the Employment letter.
   Select Request Verification to submit your request.
   Select Cancel Request to return to the Employment/Wage Verification screen.

### Select Your Verification type

- Employment Verification Letter
- Employment Verification Letter and Wage Verification

Cancel Request

如果您需要一份确认就业状态的信函,请点击"就业验证信函" (Employment Verification letter)左侧的圆圈

If you need a letter to confirm your employment status, click on the circle to the left of "Employment Verification letter"

如果您需要一份包含工资信息的 就业状态确认信函,请点击"就 业验证和工资验证"

(Employment Verification letter and Wage Verification)左侧的圆圈

If you need a letter to confirm your employment status with your wage information. Click the circle to the left of "Employment Verification letter and Wage Verification"





REQUEST EMPLOYMENT VERIFICATION



如果您需要一份就业验证信函,请点击"请求验证" (Request Verification)

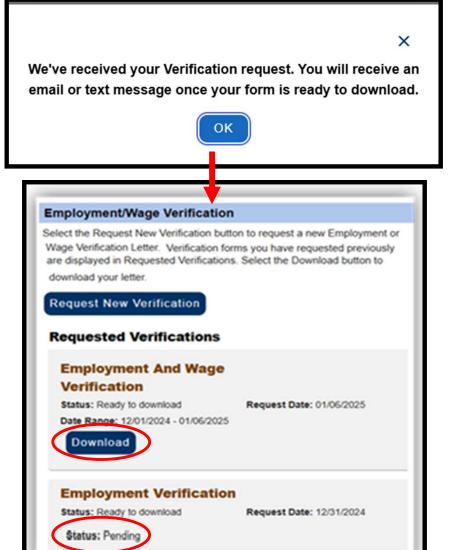
If you need an employment verification letter, click on "Request Verification"

 如果您需要一份包含工资验证的就业验证信函,您需要在点击 "请求验证" (Request Verification )之前输入日期范围

If you need an employment verification letter with wage verification, you will need to enter the date range before clicking on "Request Verification"



REQUEST EMPLOYMENT VERIFICATION



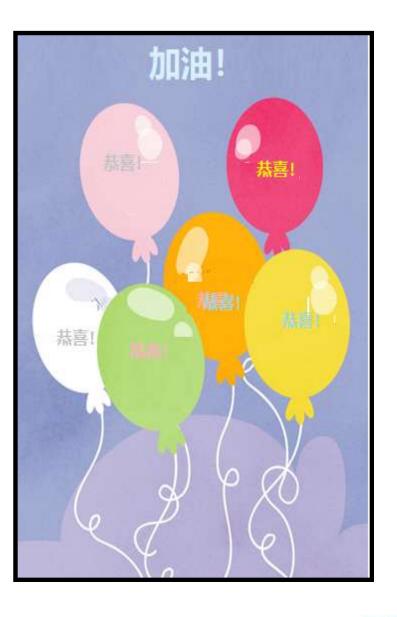
- 您将收到一条通知消息,提示您等待通过电子邮件或短信下载信函,待其在ESP系统中上线后即可下载 You will see a notification message letting you
  - know that you'll get an email or text message when the letter is available to download from the ESP

     它将显示"待处理"(Pending),
    - 直到信函准备好下载
      The request will show "Pending" until the letter is ready to be downloaded
- 收到通知后,它将显示在"已请求的验证" (Requested Verifications) 下。找到所需的验证并点击"下载" (Download)

When you are notified that it is ready, it can be found under "Requested Verifications". Go to the verification you need and click the "Download" button



### Public Authority Services by Sourcewise



### 恭喜

CONGRATULATIONS!

- 您现在知道如何在ESP上设置和查看财务信息。 您可以: You now know how to setup and review financial information on the ESP. You can now:
  - o 证明同住身份 Certify Live-in status
  - o 查看工资历史记录 View payroll history
  - o 设置和更改直接存款 Set up and change direct deposit
  - o 查看税务文件 View tax documents
  - o 申请就业验证 Request employment verification
- 查看"考勤表" (Timesheet)模块,了解如何 在ESP上提交考勤表以获取报酬 Review the "Timesheet" module to learn how to submit timesheet for payment

Review the "Timesheet" module to learn how to submit timesheet for payment through the ESP

如果您对ETS或时间表有任何疑问或问题,请致电ETS帮助台:

(866) 376-7066, 选项 1

If you have questions or issues with the ETS or timesheets, call the ETS Helpdesk: (866) 376-7066, Option 1





