

Employee Portal Navigation and Information Review

Employee Portal Navigation and Information Verification

The instructions below are designed to guide the employee through the Trion portal.

To access the login page, click here: [Employee Portal \(trionworks.com\)](https://trionworks.com).

To create your username and password, select **Register** and follow the prompts. After you have registered and created credentials, login to gain access to the Employee Portal. Inside the portal you can view personal information and make changes if necessary.

- I. **Dashboard** - After logging in you will default to the **Dashboard** page.
 - a) From the **Dashboard** you have quick access to pay stubs, benefits and any messages from your employer.

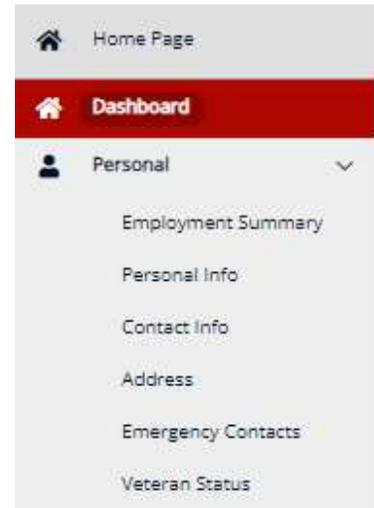
The screenshot displays the Employee Portal Dashboard. At the top, there is a 'Quick Access' bar. The main content area is divided into several sections: 'Pay' (Most Recent Pay Statements), 'SICK TIME' (Planned Taken, Available, Request Time Off, PTO Summary), 'New Messages' (No Unread Messages), 'Benefits' (Dependent, Spouse, DENTAL HIGH EMPLOYEE), and 'Life Events' (You can change your benefits based on your qualifying life event by starting the process here). A 'Swipeclock TimeCard' section is visible on the right, showing a sign-in error message. A navigation menu is overlaid on the right side, listing: Home Page, Dashboard (highlighted), Personal, Benefits, Pay, Sick Time, Documents, Events, Taxes, Onboarding, and Paid Time Off. A red arrow points to the 'Menu - Navigation Toolbar' on the left side of the dashboard.

- b) **Menu** – The menu or navigation toolbar, is located on the far, left side of the page.
 - i. Home page- same as Dashboard
 - ii. Dashboard
 - iii. Personal
 - iv. Benefits
 - v. Pay
 - vi. Sick Time
 - vii. Documents
 - viii. Events
 - ix. Taxes

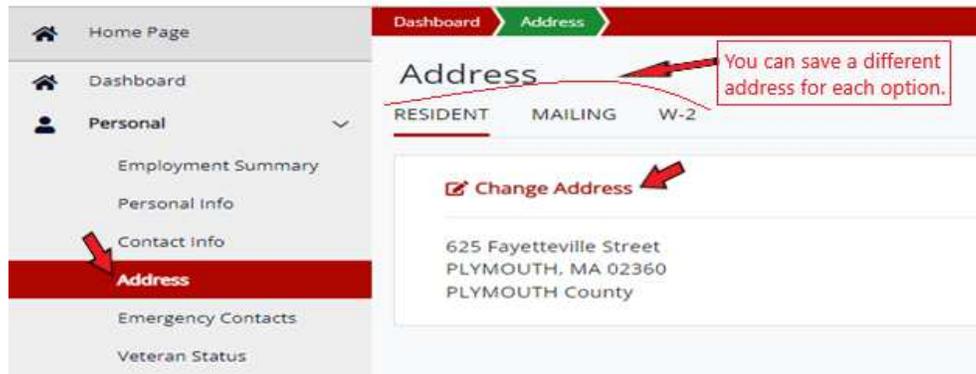
Employee Portal Overview

II. **Personal** – Under the Personal tab you can view your Employment Summary, Personal Info, Contact Info, Address, Emergency Contact and Veteran Status.

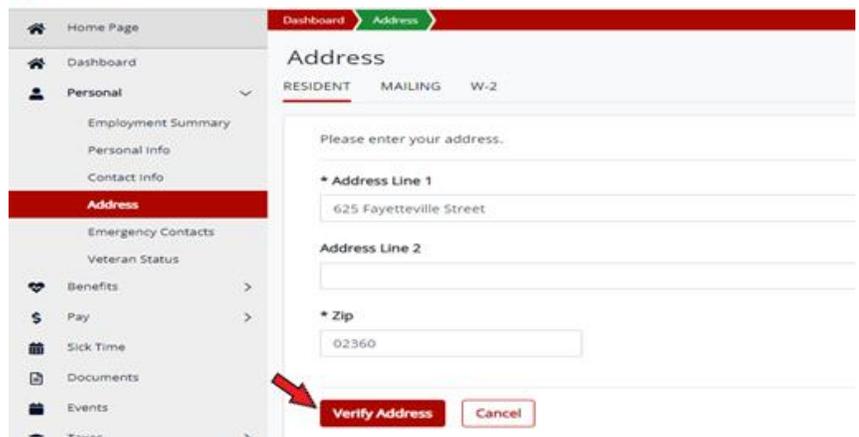
- a) Employee Summary – is view only and provides a summary of your employment information.
- b) Personal Info – View only information specific to you.
- c) Contact Info – Email and phone number.
- d) **Address** - If you have moved or your address is not listed correctly, you can select the **Address** tab and select **Change Address**. Here you can complete and save a different address for each option:
 - i. Resident
 - ii. Mailing
 - iii. W-2
- e) Emergency Contact
- f) Veteran Status



- You will be able to update your mailing address by selecting **Change Address**.



- After address information is entered, select **Verify Address**. This can be done for your Resident, Mailing, and W-2 address preferences.



Employee Portal Overview

- III. **Benefits** – If you have benefits through Trion, you'll access your Benefit information here.
- IV. **Pay** – Here, you will be able to view **Pay History**, see your YTD information by selecting **Payroll Inquiry** and add or remove a **Direct Deposit** account.

- a. Pay History – check stubs
- b. Payroll Inquiry
 - i. Earnings
 - ii. Taxes Withheld
 - iii. Deductions
 - iv. Pay History
- c. Direct Deposit – Employees may have up to 8 direct deposit accounts.
 - i. To add an account, select **Add Account**.



Direct Deposit

Select an account to make changes

Bank Accounts

Account Type	Account Number	Routing Number	Deposit Method	Amount	Maximum	Account Status
Checking	***** Show	124000737	Percent	75		Active
Checking	***** Show	123000220	Fixed	25		Active
Checking	***** Show	124000737	Fixed	10		Active
Checking	***** Show	102189285	Fixed	5		Active

Test Calculator Add Account

Next, complete all account information required fields. Once complete, select **Add**.

Home Page Direct Deposit Add Account

Account Info

* Routing Number: xxxxxxxx

* Bank Name: [Field]

* Account Type: [Dropdown]

* Account Number: xxxxxxxx Show

* Confirm Account Number: xxxxxxxx Show

Settings

* Deposit Method: [Dropdown] * Amount: [Field]

Maximum: [Field]

Add Cancel

Employee Portal Overview

- V. **Sick Time** – If an employee qualifies for Sick Time, all information will be found here or under the **Paid Time Off** tab in Menu options.
- VI. **Documents** – The Documents tab will store employee forms, uploaded by the employer or employee.
- VII. **Events** – Will inform an employee of any upcoming events, such as Open Enrollment.
- VIII. **Taxes** – Employee tax selections can be viewed, updated or printed from this tab.

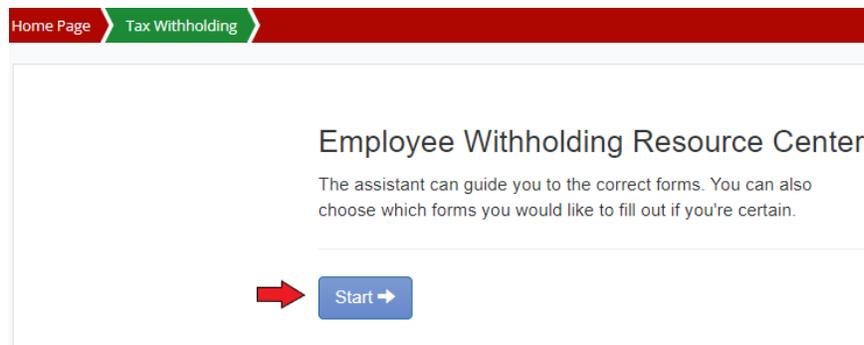
- a) Tax Withholding – View and/or Update
- b) W-2 – View/Print
- c) 1095-c – View/Print



- d) To update Tax Withholding information, Select **Update Forms**.



- i. Next, select **Start** under Employee Withholding Resource Center.



Employee Portal Overview

- ii. Next, select options to update Federal and/or State withholdings. Then select, **Continue**.

Please select which sections you would like to complete:

Note: Opting out of jurisdictions, to which you may be liable, may result in not enough taxes from being withheld or your employer to withhold at a higher rate.

Federal

I wish to complete forms for this jurisdiction. Please help determine which withholding forms apply to me

I wish to NOT complete forms for this jurisdiction at this time

Massachusetts Resident

I wish to complete forms for this jurisdiction. Please help determine which withholding forms apply to me

I wish to NOT complete forms for this jurisdiction at this time

[← Back](#) [Continue →](#)

- iii. Complete the Federal Survey by selecting the appropriate option. Example: Select, **I want to continue in English**. Then select, **Next**.

Home Page Tax Withholding

Federal — Survey

[Check my progress](#)

[Survey](#)

Select the correct choice: Foreign Earned Income Exclusion, Nonresident Alien, Continue in English, or Continue in Spanish

Foreign Earned Income Exclusion - I expect to qualify for the foreign earned income exclusion under either the bona fide residence or physical presence test for calendar year or other tax year

Nonresident Alien - I am exempt from withholding on compensation for independent (or eligible dependent) personal services of a Nonresident Alien Individual, see instructions for Form 8233

Quiero continuar en Español

I want to continue in English

Instructions for Form 8233:

[← Back](#) [Next →](#)

- iv. Next you will be directed to Start the form(s) selected in the previous step. Select, **Start** to begin your form.

Federal — Summary

[Check my progress](#)

[Summary](#)

Based on answers you provided, we have determined the following Federal withholding form(s) may apply to you.

	Locality	Name	Title	Status
Start	FEDERAL	W-4	Employee's Withholding Certificate	Not completed

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Employee Portal Overview

- v. Follow the prompts and complete all required fields.

Home Page Tax Withholding

Federal - Employee's Withholding Certificate - W-4

★ Wizard Form and Instructions

Check my progress

- Nonresident Alien
- Exemption
- Filing Status
- Step 2 Survey
- Dependents survey - Step 3
- Step 3
- Other Adjustments Survey (Optional) - Step 4**

Would you like to complete step 4 (Other Adjustments) for other income, deductions, and extra withholding? This step is optional.

Yes

No

◀ Back Next ▶

Required Fields

- vi. Scroll to review form selections. **Print** form if desired. If information appears to be correct select, **Submit Form**.

Home Page Tax Withholding

★ Wizard Form and Instructions

Please review the document below

If you would like to make any changes, you may return to the previous page.

If you would like to submit this form, please agree to the terms below.

Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.

Submit Form Print

W-4 Employee's Withholding Certificate

Form W-4 (2022)

Department of the Treasury Internal Revenue Service

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Use Form W-4 to your employer. Your withholding is subject to review by the IRS.

2022

Step 1: Enter Personal Information

(a) First name and middle initial John	Last name Smith	(f) Social security number ***-**-6258
Address 625 Federal Furnace Rd		
City or town, state, and ZIP code Plymouth, MA 023604735		

(g) Single or Married filing separately
 Married filing jointly or Qualifying widower
 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)

Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, when to use the estimator at www.irs.gov/W4App, and privacy.

Step 2: Multiple Jobs or Spouse Works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs. Do only one of the following:

- (a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3-5), or
- (b) Use the Multiple Jobs Worksheet on page 4 and enter the result in (Step 4c) below for roughly accurate withholding; or
- (c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld.

Tip: To be accurate, submit a 2022 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

Complete Steps 3-4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3-4(b) on the Form W-4 for the highest paying job.)

Step 3: Claim Dependents

If your total income will be \$200,000 or less (\$100,000 or less if married filing jointly): Multiply the number of qualifying children under age 17 by \$2,000 ▶ 3 6000.00	
Multiply the number of other dependents by \$500 ▶ 3 5000.00	
Add the amounts above and enter the total here	3 6500.00

Employee Portal Overview

- IX. **Logout / Account Settings** – Located in the upper right corner of your screen, select the icon with your first initial.
- a) Select **Account Settings** to reset your password.
 - b) **Log Out** – to end session.

