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# **JD Edwards World**

# **Employee Self-Service**

# **Guide**

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**Version A9.1**

**Revised - January 15, 2007**

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# 1 Overview



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# Overview to Employee Self-Service

Human Resource (HR) and Payroll (PR) managers have great flexibility and control using Employee Self-Service. Employee Self-Service consists of two components, the programs that employee's use and the programs that Human Resource and Payroll managers use to manage employee access and requests. Employees use the Employee Self-Service menu while Human Resource and Payroll managers use the Employee Resource Management (ERM) menu. Each of these components has a separate URL.

Using the Employee Self-Service menus, employees can:

- Change Federal W-4 information
- Change address information
- Enter time records
- Choose Benefit plans
- Add a new family member
- Change information for existing family members
- Track vacation balances, sick balances, or other accrual information.

## Features

- Employee program control. Human Resource and Payroll managers control specific programs employees' access. Payroll managers can set up a restricted list of pay types for employees to choose from when entering their time. They can also create a different description for each pay type.
- View Vacation-Sick employee program. This program allows for all four types of accrual set up. Management controls which accrual types employees can see by creating a restricted list of accrual types. They can define a different description for each accrual type.
- Change Federal W-4. An employee can enter their Federal W-4 information or view, print, and change their current Federal W-4. The information the employee views is consistent with the 2007 Federal W-4 Form. All of the directions are in vocabulary overrides. If the wording on the form changes slightly in a following year, you can easily change the vocabulary override.
- Production Maintenance Program for Federal W-4. This program allows the Human Resource or Payroll manager to view and maintain the Federal W-4 information that an employee enters. After approval and the upload process, the system stores the information in the Federal W-4 Master File (F06303). Federal W-4 Inquiry/Maintenance allows management to make changes for the

employee if they receive a request by the employee or as the IRS requires. It provides the opportunity to add W-4 information for one or all new employees to suit your business needs. Management can also print employee W-4 information with the electronic signature values and print reports to include questions 8-10 for submission to the IRS.

- Access to Manager Menus. Human Resource and Payroll managers use the Employee Resource Setup menu (G08ESS) for the set up programs and to access the processing options for employee programs. The Employee Resource Management menu (G08ESSM) includes the programs that managers use when employees make requests for changes to their employee information. This includes an approval program for each employee program where HR/Payroll can review the employee's request, approve or reset and upload the request to the production files. Each employee request has a record in the appropriate history files, for compliance with electronic signature law, and there is an inquiry program and a set of World Writer report versions for each employee program. These features are not available with the View Vacation-Sick program.

## Electronic Signature Law Compliance

The Employee Self-Service programs are in compliance with electronic signature law.

- Each employee program displays an Approve button for the employee to use when they finish making the changes. When the user clicks Approve, the Electronic Signature Acceptance window displays, explaining the agreement with the company regarding the change they request. The employee has the option to accept or not accept. If they do not accept, they can exit the program or continue to request changes.
- After the employee confirms their choices they can keep a record of their requests and the agreement they make. They can either print a copy of this or keep an electronic copy, which they can e-mail to an address of their choice.
- When the employee accepts the agreement for the changes, the system saves the values as well as the time, date and other unique markers in temporary files. If management approves the employee's request and uploads the data to the production files, the system copies all of the values in the temporary files to the electronic signature history files for validation and future reference.
- The HR/Payroll Department uses the programs on the Employee Resource Management menu (G08ESSM) to access the information in the electronic signature history files.

## Controls in Employee Self-Service

The Human Resources/Payroll Department has the following controls over employee programs:

- Access to programs and when access is available.
- Date choices become effective for specific benefit events.

- E-mail to HR/Payroll containing questions and information within the program and who receives the e-mail.
- Information employees can access while using the Self-Service programs. This information can include regulations, requirements, or instructions to aid with decisions.

## Flows

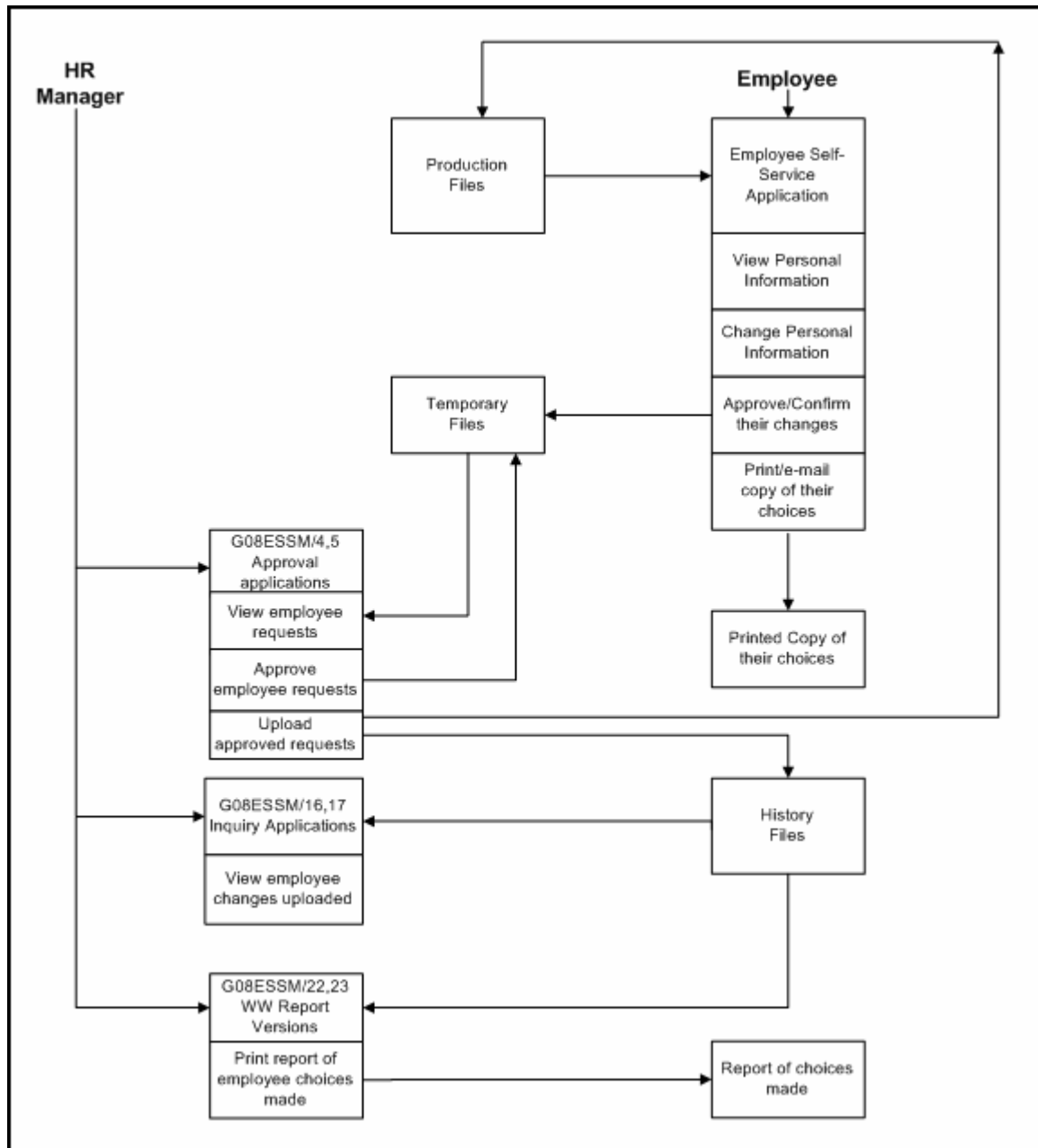
The system saves the choices that employees make in temporary files, which are specific to each program. After you approve employees' choices and upload them, their requests become records in your production files. The number of temporary files the system uses and the complexity of the flow of information varies dependent on the program. The two flows of information include

- Change Federal W-4 and Address
- Select Benefits and Change Participant

### **Change Federal W-4 and Change Address Flow**

The system displays current data from the production files on the screen that the employee views. When the employee makes changes to this data, the system saves the data in temporary files. The manager views the data in the temporary file using an approval program.

## Flow for Change Federal W-4 and Change Address



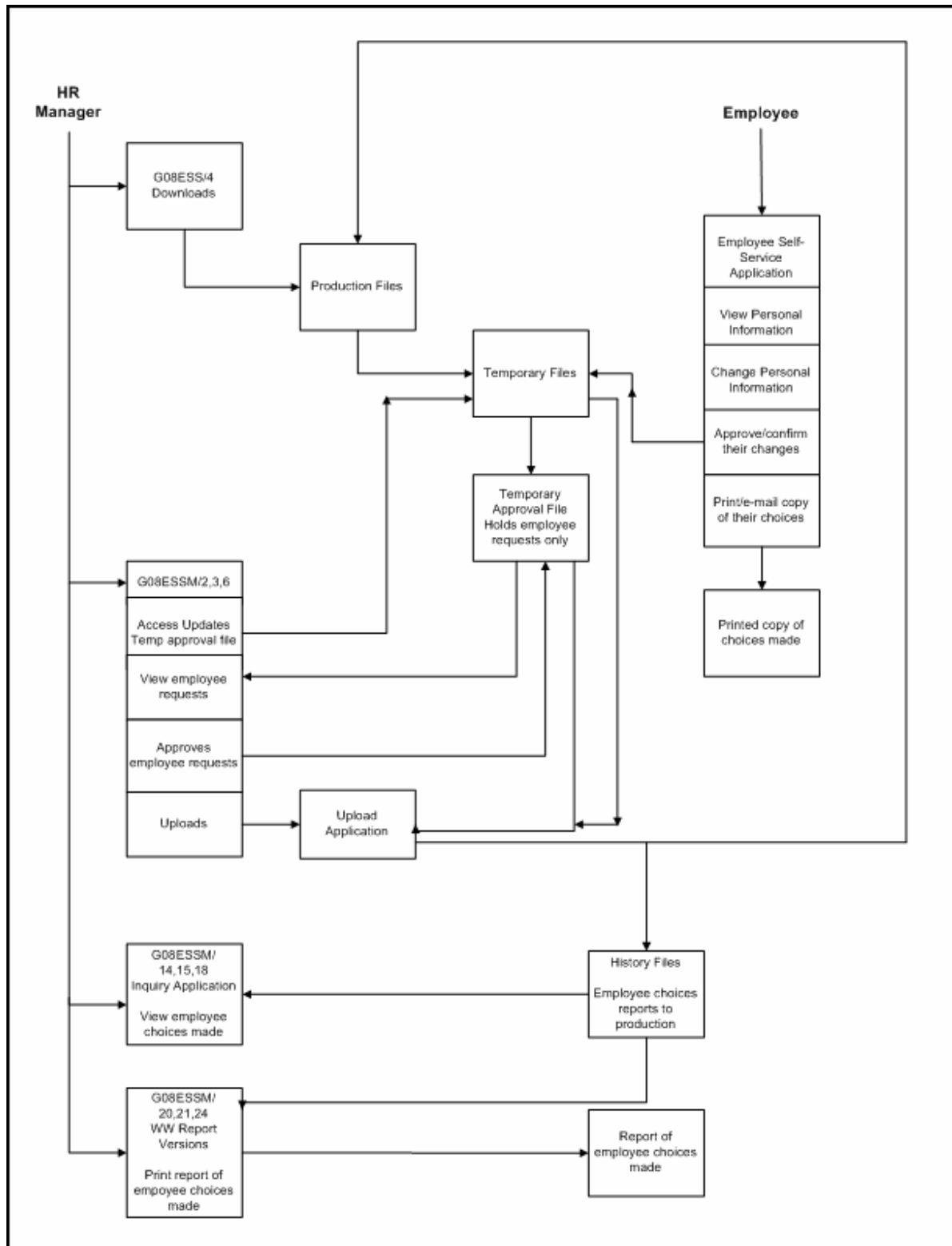
## Flow for Select Benefits and Change Participant Information

The data in the Select Benefits and Change Participant Information temporary files is a copy of the current data in the production files. Before employees can use these two programs, you must download the data in the Benefit Setup File Download program (P08334DL). In addition, to use the Open Enrollment and Retirement events in Select Benefits, you must also run DBA Setup File Download (P069117JQ). The system copies values in the DBA field in production files to Dependent Beneficiary Accrual (DBA) temporary files. This allows you to customize DBA setup to suit your business needs. The Next Year DBA Setup program allows HR to set

new DBA values for the year or season which the system saves to the temporary files. Users access the data that resides in the DBA temporary files for only Open Enrollment and Retirement events. The other events access DBA data in production.

The system copies the employees' data that resides in the DBA temporary files to an approval temporary file. This is the data that management views for evaluation within the approval program. Once management approves the data, you upload the data to the production and history files. Using a separate approval temporary file can help you avoid access issues.

## Flow for Select Benefits and Change Participant Information





## **Time Entry**

The data in the Time Entry program is only the data the employee enters and approves. The system saves the data the employee enters and approves in a temporary file and the employee can later view this data.

Additionally, the system copies the employees' time entry data to an approval temporary file. This is the data that management views for evaluation within the approval program. Once management approves the data, they upload the data to the production and history files. Using a separate approval temporary file can help you avoid access issues.

## **Employee Self-Service Menus**

### **Employee Resource Setup Menu (G08ESS)**

#### **Setup Processes**

HR and PR managers use Event Setup and PC/Web Access Setup to set up events which control if and when employees have access to programs. You can also set up information you want to make available for employees to view while entering change requests. This information can include regulations, requirements, or instructions to aid with decisions.

HR managers run the Benefit Setup File Download and DBA Setup File Download programs to copy data from the production files to temporary files. The data in the temporary files is the data that employees change and that the HR/Payroll manager evaluates for approval.

HR managers use the Next Year DBA Setup program to change the DBA rates and standards for the next year in the temporary DBA files. Employees access the data in the temporary DBA files during open enrollment and retirement events within Select Benefits.

#### **Employee Processing Options**

These menu selections are identical to the menu selections that employees use when they access Employee Self-Service. You use these menu selections to set the processing options for the employee programs.

#### **Employee Request Management**

You use Request Approval-History Menu to access the Employee Resource Management menu.

### **Employee Resource Management Menu (G08ESSM)**

#### **Approval Applications**

The HR or Payroll manager uses these programs to view employees' requests for changes to their HR or time entry records. The manager can approve or reject the

requests and then submit the approved records for upload to the respective production files.

### Electronic Signature Inquiry

Use these programs to select records by a specific event or employee. The system displays the history of approval records in the production files for the choices employees make.

### Electronic Signature Reports

Use these programs to access World Writer report versions. These reports allow you to select records by a specific event or employee. You can print reports of the history of approval records in the production files for the choices employees make. The electronic signature components which are specific to an employee, the event, and time of their choices print on each report.

## Employee Resource Online Menu (G08ESSJW)

The Employee Resource Online Menu includes the following employee programs:

- Select Benefits
- Change Participant Info
- Change Address
- Change Federal W-4
- View Vacation-Sick
- Enter Time

This menu must exist on the iSeries to provide access for the J Walk screens. You can access them in an iSeries environment; however, do not use them. Use of these programs by anyone other than specific employees entering their requests can compromise company legal standards for electronic signature law.

## PC/Web Access Setup

PC/Web Access Setup allows you to set up documents, spreadsheets, PDF documents and websites for employees to view when accessing any of the employee programs. You should place the documents and spreadsheets in the Docs folder on the deployment server. The deployment server is where you install JWalk.

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**Note:** Enter only the document or spreadsheet filename and file type in the PC/Web Name&Path field. For example, enter Compare Plan Rates.xls.

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See the *Self Service Configuration Guide* for more information.

## Additional Setup Considerations

Before using the Select Benefits and Benefits Selection Approvals and Upload you must consider the following when setting up your system:

- You download benefits again after each major enrollment period, approval, and upload.
- If employees enroll family members as dependents or beneficiaries, you must set up plans to require a dependent or beneficiary.
- You must recreate the DBA changes in the Next Year DBA Setup in production for the beginning of the new period. There are no upload programs for these changes and temporary files.
- That if you want to allow the employee to enroll in more than one plan for a category, you cannot use category rule R (required) or O (optional).
- If the effective date of the plan is different than the effective date of the event, you must make employees aware of this. For example, effective at the beginning of the next month. You can use this feature for the benefits events such as Life Change. You should not use this for the Open Enrollment, Retirement, and New Hire events as there can be a conflict of dates.
- Do not use default plan setup for controlled flow benefit events.
- Plans which provide options require dependents. You cannot include an additional plan option for the employee only.
- Select Benefit does not process or display flex or group rule information.



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## 2 Set Up



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# Overview to Employee Self-Service Set Up

You must set up all programs before you or your employees can use this system.

## Processing Option Setup

You must set up the processing options for the following programs on the Employee Resource Setup menu (G08ESS):

- Benefits Setup File Download
- Select Benefits
- Change Federal W-4
- View Vacation-Sick
- Enter Time

The processing options for Select Benefits, Enter Time, and View Vacation-Sick are similar to those for Benefit Group Selection program on the Benefits Administration menu (G08B1), Time Entry by Employee program on the Time Entry menu (G0712) and the Benefit/Accrual Inquiry program on the History Inquiries menu (G0714). Processing options exist for each of the employee programs. Additional informational for PC/Web Info Setup exists at the bottom of the processing options.

Additionally, you must set the processing options for the Federal W-4 Inquiry/Maintenance program on the Employee Resource Management menu (G08ESSM).

There is no required processing option setup for the Change Participant Information and Change Address programs.

## Setup Programs

Following are the setup requirements for each program on the Employee Resource Setup menu (G08ESS):

- Event Setup (P08EVNT)). You must set up events for all programs your employees access.
- PC/Web Access Setup (P08INFO): Optionally, you can set this for all programs your employees' access on the Web.
- Benefits Setup File Download (P08334DL): You must run this program before your employees use Select Benefits programs and Change Participant Information. Additionally, you must run this program after each major

enrollment period. How frequently you run the program is dependent on how often your employees use Employee Self-Service programs.

- **DBA Setup File Download (P069117JQ):** You must run this program before your employees use Select Benefits for the Open Enrollment and Retirement events. You also run this program before a new enrollment period to make changes to DBA values within Next Year DBA Setup.
- **Next Year DBA Setup (P069117):** You must run this program before your employees use Select Benefits for the Open Enrollment and Retirement events. Use this program only if you want to make changes to DBA values in production files before the new enrollment period. The Retirement and Open Enrollment events use DBA information in temporary files which you download from production files using the DBA Setup File Download program. Next Year DBA Setup allows changes to DBA information that the system stores in temporary files.

## **Employee Self-Service Programs**

Following are the setup requirements for programs on the Employee Self-Service menu (G08ESSJW):

**Select Benefits (P08334SS):** You must plan and setup each benefit group depending on the category rules and defaults that suit your business needs. If you allow employees to enroll participants in plans you need to determine which plans require dependents or beneficiaries and set up those plans.

**Change Participant Info. (P08336SS):** You can set up a special informational window to display for employees when they add a participant.

**Change Federal W-4 (P0601SS):** You must perform set the processing options for the three Federal W-4 programs.

**View Vacation-Sick (P06093S):** You must set up a UDC table for the Accrual Type for Employee Self-Service field.

**Enter Time (P061121S):** You must set up the restricted pay type UDC table for the Online Pay Type field. Additionally, you can use labor distribution with the Enter Time program.



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## Downloading Dependent Beneficiary Accrual (DBA) Setup Files

You use the DBA Setup File Download program (P069117JQ) to download the current DBA set up file data from production files into temporary files for use by the Next Year DBA Setup and the Select Benefits programs. The program downloads the following file data to these temporary files:

- Transaction Cross Reference (F069036) to Transaction Cross Reference for Self Service (T069036)
- Transaction Parameters (F069116) to Transaction Parameters for Self Service (T069116)
- Generic Table Constants (F069026) to Generic Table Constants for Self Service (T069026)
- State/Local W2 Additions (F069117) to State/Local W2 Additions for Self Service (T069117)
- Wage Attachment (F06931) to Wage Attachment File for Self Service (T06931))
- Wage Attachment Additional Exemptions (F069311) to Wage Attachment Additional Exemptions for Self Service (T069311)
- Wage Attachment Exemptions (F069312) to Wage Attachment Exemptions File for Self Service (T069312)

You must perform this download prior to employees using any of the Select Benefits for the Open Enrollment and Retirement events as well as using the Next Year DBA Setup program.

You can choose whether or not to change any DBA values in the Next Year DBA Setup program; however you must perform this download so there are values in the DBA temporary files. The HR manager can then use the Next Year DBA Setup program to change DBA rates or requirements in the temporary files. The system uses the new DBA data in the Select Benefits program for the Open Enrollment and Retirement events so you can ensure that the DBA calculates correctly for next year's or next period's enrollment.

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**Note:** There is not a program that uploads the temporary DBA files into production

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From Employee Resource Setup (G08ESS), choose DBA Setup File Download

## What You Should Know About

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**When to download**

Complete this download before you want to change DBA values for a new Open Enrollment or Retirement enrollment period. Changes to benefit plans must be complete and a new enrollment period should not begin for either Open Enrollment or Retirement prior to this download. Otherwise, you overwrite any new DBA information that you enter using the Next Year DBA Setup program and the new DBA information will no longer exist.

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## Downloading Benefits Setup Files

You use the Benefits Setup File Download program (P08334DL)) to download current employee benefits enrollment data from production files to the temporary files for use by the Select Benefits program. This program also downloads the participant information from production files to temporary files for use by the Change Participant Information program (P08336SS)). The program downloads data as follows:

- Employee Enrollment (F08330) )to Employee Enrollment - WF for Employee Self Service (T08330)
- Employee Pay Instructions (F06106) )to Employee Pay Instructions File for Employee Self Service (T06106) file for employee self service)
- Dependents/Beneficiaries X-Ref file (F08336) )to Dependents/Beneficiaries - WF for Self-Service (T08336) wf for employee self service)
- Participant File (F08901)) to Participant File - WF for Self-Service (T08901) wf for employee self service
- 401K Elections (F08346)) to 401K Elections for Employee Self-Service (T08346)for employee self service)
- Flexible Spending Accounts – Balances (F08370) to Flexible Spending Accounts – Balances File - Employee SS (T08370)

You use Date for Downloading Records processing option to control the volume of records you download from each benefit plan file. The system downloads all records with an end date greater than the date you enter and all records with an end date of zero. If you do not enter a date in this processing option, the system downloads all records.

The system also removes data in these temporary files:

- Benefit Selection Approval File - Self Service (T08APR) )
- Dependent/Beneficiary Approval File - Self-Service (T08ADB)

You must perform this download prior to employees using any of the Select Benefits and the Change Participant Information programs. JD Edwards recommends that you run the program after each major enrollment, approval and upload process. This allows the correct information to reside in the temporary files. The most current data is available to employees for making life changes, and so forth using Select Benefits. You must coordinate the download for Select Benefits with the download for Change Participant Information. The frequency with which you download participant information depends on the volume and frequency your employees use the Change Participant Information program. JD Edwards recommends that you perform the download during non-business hours when employees do not have access to these programs.



From Employee Resource Setup (G08ESS), choose **Benefits Setup File Download**

## What You Should Know About

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### When to download

You should download after each major enrollment period when the employee requests have been approved and uploaded. Otherwise, you run the risk of having multiple requests for changes per employee for multiple or same events in the temporary files which can cause unpredictable results.

Additionally, do not download when employees are accessing the events or employee requests are waiting for approval and upload. Doing so overwrites their requests.

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# Setting Up Next Year's DBA File

The HR Manager uses the Next Year DBA Setup program (P069117SS) to make changes to the current Dependent Benefit Accrual (DBA) data prior to employees accessing the data in production files. The system saves any changes you make to DBA rates and requirements in the temporary DBA files. Employees access this data only during the Open Enrollment and Retirement events in a new enrollment period. This program is similar to the DBA Setup program on the Benefits Administration Setup menu (G08B1) however this program saves your changes to temporary files.

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**Note:** Use this program only when the open enrollment and retirement events, which access the DBA data in the temporary files, are not active.

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From Employee Resource Setup (G08ESS), choose **Next Year DBA Setup**

**069117 Next Year DBA Setup**

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
Additional Parameters  
DBA Limits  
Tax Exempt Authorities  
State/Local W-2 Addition  
Category Codes Setup  
Address Book  
Garnishment Calculation  
Standard Exemption Ar  
Basis of Calculations  
DBA Text Window  
Calculation Tables  
Additional Exemptions  
Rollover Setup Window  
Year-End Parameters  
Print DBA  
Clear Screen

**Next Year DBA Setup**

Action Code: 069117  
DBA Code: 1005 Health/Co. DBA Type: B

**DBA Calculation**

Source of Calculation: G Current Period  
Method of Calculation: A Flat Amount  
Table Cd (Methods 1-9):  
Amount or Rate 1 & 2: 45.0000  
Effect on Disposable Wage: 1  
Calc if No Gross (Y,N): N  
Calc in Pre-Payroll (Y,N): Y  
Effect on Check: 1

**Paystub Info**

Paystub Text: Health/Co.  
Method of Printing: N  
DBA Print Group:

**General Acct Info:**

Effect on GL: N  
A/P Voucher(Y,N): N  
Payee Address No.:

**DBA Time Table**

Pay Period to Calculate: Y / Y / N / N / M  
Calc Once Per Period (Y,N): N  
Eff Dates - From & Thru:

**Arrearage Information**

Arrearage Method: N  
When to Adjust Ded: 0  
Order to Adjust Ded:

F5=Addl F6=Limits F8=Exmpt F16=Text F19=Rollover F20=YearEnd F24=More



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# Setting Up Events

The HR or Payroll Manager uses the Event Setup program (P08EVNT)) to set up events for each program. You must set up specific events for employees to access in the Self Service programs. Additionally, you must set up events prior to using the PC/Web Access Setup for the Self-Service programs.

Consider the following as you set up events. You must set up:

- One event for each program
- Specific events prior to setting up information in PC/Web Access Setup for the same programs
- Multiple events in Select Benefits, such as Open Enrollment and Enter Time, such as Bi-weekly time entry programs. Employees select an event when they access the program.
- Effective dates for all events prior to the employee accessing Self-Service.

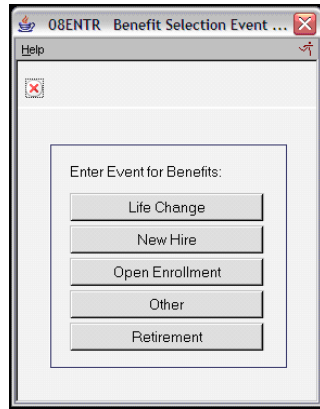
## Available Events

You set up a single event for the following programs. The employee does not view or select the event; the system associates it with all of the choices the employee makes. The system stores the information in the employee history files when management approves and uploads the requests.

- Change Federal W-4 – W4
- Change Address – AD
- Change Participant Info – DB

For Select Benefits the following events are available:

- Life Change (LC)
- Other (OT)
- Open Enrollment (OE)
- Retirement (RT)
- New Hire (NH)



For Enter Time the following events are available:

- Bi-Weekly Time Entry (TB)
- Time Entry (TE)
- Monthly Time Entry ('TM')
- Semi-Monthly Time Entry (TS)
- Weekly Time Entry (TW)



## Event Codes

Do not change the codes for events in UDC table 08/ER. These codes determine how the system processes the employee's request. Additionally, you should not change the description of events for Change Address, Change Federal W-4, or Change Participant Information as the employee does not view these events in the same manner as they view Benefits or Time Entry. However, you can make changes to the description for either Benefits or Time Entry. Limit the description to 20 characters in length or the entire description does not display in the screen or on reports. For example, for time entry events you choose to use only one for union employees and one for non-union employees. You change the descriptions to UNION Time and NON-UNION Time.

All events display as a choice for the employee when entering time; however, if the events are not set up, the employee receives an error message when they choose one of these events. You can remove the descriptions of the events in the UDC table;



however, JD Edwards recommends that you make note of the original descriptions, as the system bases the processing of events on the descriptions.

Additionally, the employee receives an error if they choose an event on a date that is outside the date range on Even Set Up.

## Controlled Flow

In order to require the employee to evaluate and choose a plan for the enrollment period, the system controls the flow of screens which it displays for benefit events. This flow is available for the Open Enrollment, Retirement, and New Hire events. During set up, you choose which categories of plans are available for the employee to access for the event. For example, MEDICAL, DENTAL and VISION are available for the open enrollment event. When the employee begins selecting benefits for open enrollment, a screen displays all medical plans. When an employee chooses a medical plan, a screen displays all of the dental plans from which to choose. When the employee chooses a dental plan, a screen displays all of the vision plans from which to choose. When the employee chooses a vision plan, a confirmation screen displays with a list of their choices.

For the Life Change and Other events, the employee selects the category they want to review, then chooses a plan or exits without making a selection.

## Event Set Up Fields

### Event Effective Date Field

For the Select Benefits Open Enrollment, Retirement, and New Hire events, the HR manager sets the effective date for the event. This is the date the employee's enrollment request becomes effective in production once management approves and uploads the requests. The system enters this date when the employee accesses Select Benefits for that event. The employees cannot change the date.

For Life Change, Other, Change Address, and Change Participant Information, the HR Manager does not enter an effective date for any of these events. The employee enters the date to match the employee's needs.

For Enter Time events, the payroll manager can enter an effective date. If they enter an effective date for any time entry events, the system enters this date in the Date Worked field on the Enter Time screen. The employees cannot change the date.

For Change Federal W-4, neither the HR Manager nor the employee can enter an effective date. Management enters the year of the Federal W-4 form in a processing option in the Change Federal W-4 program (P0601SS). The effective date of the employee's Federal W-4 in production occurs once management approves and uploads the requests and they update the Employee Tax Exemptions/Overrides file (F06017)).

The View Vacation-Sick event has no effective date, as employees cannot input data.

## Program Name and Version Fields

You must complete the Program Name and Version fields.

**Note:** The values you enter in these fields must be correct as the program accesses these values for evaluation and the AS400 Event Setup program does not verify the Program Name and Version for the event.

The following table includes each event and the appropriate Program Name and Version.

Event	Event Description	Program	Version
AD	Address Change	P01ABSS	ZJDESS001
DB	Participant Change	P08336SS	ZJDESS001
LC	Life Change	P08334SS	ZJDESS001
NH	New Hire	P08334SS	ZJDESS001
OE	Open Enrollment	P08334SS	ZJDESS001
OT	Other (Enrollment)	P08334SS	ZJDESS001
RT	Retirement	P08334SS	ZJDESS001
TB	Bi-Weekly Time Entry	P061121S	ZJDESS001
TE	Time Entry	P061121S	ZJDESS001
TM	Monthly Time Entry	P061121S	ZJDESS001
TS	Semi-Monthly Time Entry	P061121S	ZJDESS001
TW	Weekly Time Entry	P061121S	ZJDESS001
VS	View Vacation-Sick	P06093S	ZJDESS001
W4	Change Federal W-4	P0601SS	ZJDESS001

## Header and Header Field Values

Enter values in these fields for only benefit events. These fields are important for all benefits events because the values control which type of plans are available for the employee to choose or remove for specific benefit events. The Header Field Value is any of the benefit categories you want to include for the event.

If you assign the employee to a benefit group and that group does not include a particular category, even though the category is in the event in the Header Field Value field, the category does not display. For example, you assign the employee to

the HOURLY benefit group which does not include the VISION category. Even though the VISION category is in the Open Enrollment event in the Header Field Value field, VISION does not display when the employee accesses the event during the Select Benefits option of Self Service.

## To set up events



From Employee Resource Setup (G08ESS), choose **Event Setup**

On Event Setup, complete the following fields:

- Event
- Company
- Country
- Effective Dates
- Event Effective
- Manager E-mail
- Program Name
- Version
- Header Field
- Header Field Value

---

**Note:** Do not set up multiple copies of the same event for the same company and country. JD Edwards cannot assure which record the system retrieves for processing if multiple copies exist.

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08EVNT Event Setup

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
Previous Event  
Next Event  
Clear Screen

08EVNT Event Setup

Action Type I  
Event OE Open Enrollment  
Company 00007 A Model Payroll Company  
Country US United States  
Effective Dates 11/01/07 to 11/30/07  
Event Effective 01/01/08  
Manager James Smith  
Manager E-mail James.Smith@comcast.net  
Program Name P08334SS Benefit Group Selections for Self Service  
Version ZJDESS001 Enrollment - Rules and Eligibility SS

P	Field	Header	Field Value
<input type="checkbox"/>	VDSBGR	DENTAL	
<input type="checkbox"/>	VDSBGR	LIFE	
<input type="checkbox"/>	VDSBGR	MEDICAL	
<input type="checkbox"/>	VDSBGR	SPENDING	
<input type="checkbox"/>	VDSBGR	VISION	

F3=Exit F7=Error F24=More Keys

Field	Explanation
Event	This is a "Generic" Status Code used by the HR Application. Examples of where/why it is used are as follows: Plan Master Rates (P083203). Uses it to flag "Active" or "Inactive" rates associated with a given Plan/Option.
Company	<p>The company number in which the employee generally resides.</p> <p><i>Screen-specific</i></p> <p>Use this field to set up similar events for various companies.</p>
Country	<p>Enter a UDC (00/CN) for the country.</p> <p><i>Screen-specific</i></p> <p>Use this field to set up similar events for different locations of your company.</p>
Effective Dates	<p>The date on which a requisition, a position, or activity within a position takes effect.</p> <p><i>Screen-specific</i></p> <p>This date range determines the time period your employees have access to this event. For Time Entry the employee can enter time for dates they work after the end date of this range, but not for dates they work before the beginning of this time range.</p>

Field	Explanation
Event Effective	The effective date is used generically. It can be a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, or whatever is appropriate.
Manager	Optionally, enter the manager's name.
Manager E-mail	Manager E-Mail Address. Used in Event Setup for Self-Service.
	<i>Screen-specific</i>
	You can assign an e-mail address for this event. Employees can provide information or ask questions via e-mail from the event screens. This is available for all application events.
Program Name	The identification, such as program number, table number, and report number, that is assigned to an element of software.
Version	A user-defined set of specifications that control how applications and reports run. You use versions to group and save a set of user-defined processing option values and data selection and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process, you must choose a version.
Header Field	The RPG field name (6 bytes) to be passed as a parameter on function key exits or subfile options.
	<i>Screen-specific</i>
	This field applies only to Benefit events.
Header Field Value	This field applies only to Benefit categories that you include for each Benefit event. For example, Medical, Dental, or Vision



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# Setting Up PC/Web Access

The PC/Web Access Setup program (P08INFO) allows the Human Resource or Payroll Manager to attach information for employees to access while using any of the Self-Service programs. For example, you can attach a document about medical plans that providers supply to your company which includes the details of plans. )

The types of documents that you can provide include:

- Text documents
- Spreadsheets
- PDF

Additionally, you can provide a URL to a Website for employees to access while using the Self-Service programs.

You must complete all fields in the header portion of the PC/Web Access Setup screen. The Program Name and Version fields are identical to those in the Event Setup program.

PC/Web Access Setup is an optional program.

## Where Employees View Information

For Select Benefits, the employee views all of the plans available for a specific category on the Plan screen. There are multiple places on this screen where the employee performs an action, such as clicking a button or link, to access the information you attach. The system retrieves the information which displays on another screen or in a window. These link or event buttons include:

- **POPEN:** Selecting the category. The information displays before the screen displays with all the plans for that category.
- **PUSH1:** Chooses an icon in the upper right corner of the plan screen for a category.  
**PUSH2:** Chooses an icon in the upper right corner of the plan screen for a category.
- **DCLICK:** Chooses an option on the plan line that is available for the category. This can be set up for each plan line within a category and for all categories.

For Enter Time, Change Address, and Change Participant Information, the employee views information you attach on the screen for that program. There is an Access Type field in each of these self service options.

For Change Participant Information, you can attach information for both the Participants by Employee- ERM screen and for the Participant Information - ERM screen using PUSH1-NSF.

The Change Federal W-4 program uses PUSH1-NSF on the initial screen. This program also uses the PUSH2-NSF and PUSH3-NSF events for the second and third program screens, respectively.

## Examples

### POPEN Example

This first screen in this example displays the category of plans. When the employee clicks Next, the second screen displays with the information you set up for the flexible spending account category in the POPEN event. In example a POPEN for the MEDICAL category, the information displays before the screen that displays the category of MEDICAL plans.

0833455 Select Benefits

Options Help

ORACLE JD Edwards World URL

Open Enrollment

Employee Number 15423 Vandercleet, John W. Elected Total 18.30-

Effective Date 01/01/2008

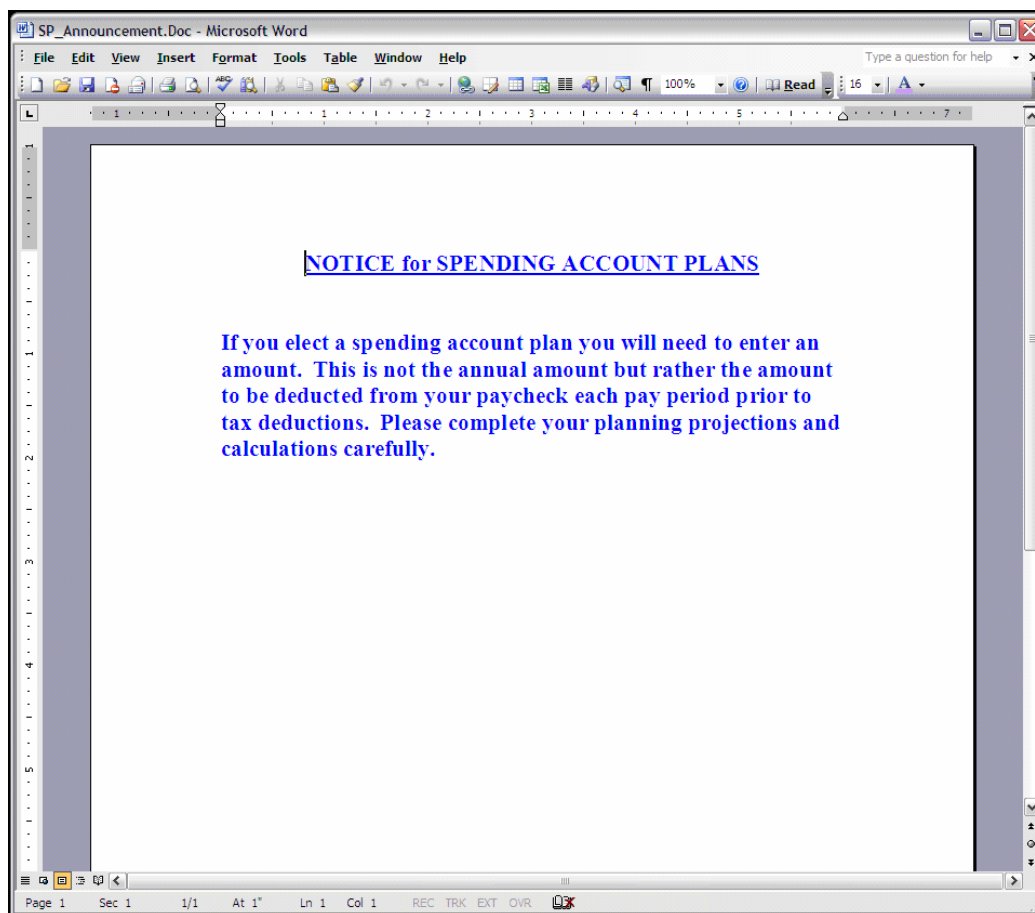
Double-Click on Plan Line below for More Information  
Highlight Line & Choose Options to Display or Change

Plan	Plan Description	Status	Amount
VISION00	Vision - Basic - Employee		1.56-
VISION01	Vision - Premium - Employee	Elected	3.05-
VISION00	Decline Vision		

VISION - One Election Is Required

Previous View New Selections Next





## PUSH1 Example

The first screen in this example displays the list of plans for the medical category. When the employee clicks Guide for Benefits, the second screen displays the Medical Insurance Guide document. Using PDF documents allows you to include large documents for employees to review.

0833455 Select Benefits

Options Help

ORACLE JD Edwards World URL

Open Enrollment

Employee Number 15423 Vandercoleet, John W. Elected Total

Effective Date 01/01/2008

Double-Click on Plan Line below for More Information  
Highlight Line & Choose Options to Display or Change

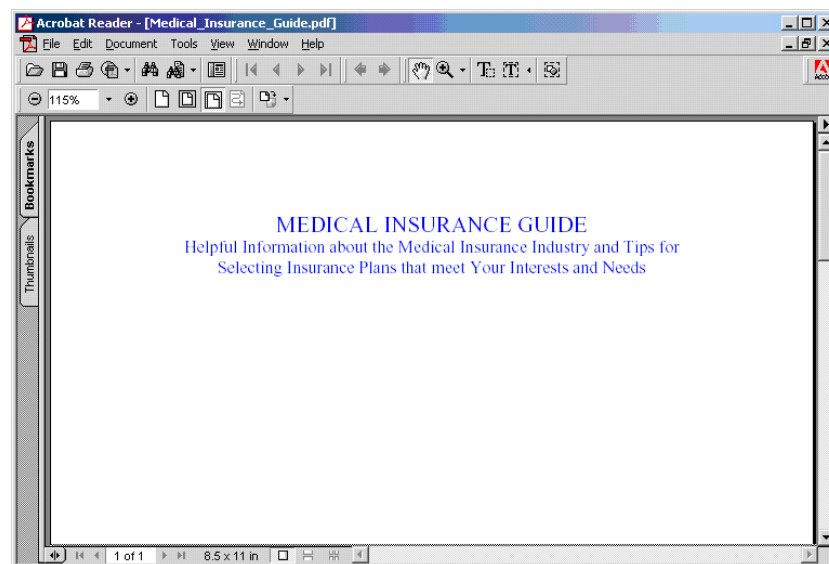
Guide for Benefits

Compare Rates

MEDICAL - One Election Is Required

Plan	Plan Description	Status	Amount
MED	Medical - Employee Only		9.75-
MED+FAM	Medical - Employee & Family		15.00-
MED+ONE	Medical - Employee + One		12.00-
MED00	Decline Medical		

Previous View New Selections Next



## PUSH2 Example

The first screen in this example displays the list of plans for the medical category. When the employee clicks Compare Rates, the second screen displays a spreadsheet with rate comparisons.

0833455 Select Benefits

Options Help

ORACLE JD Edwards World

URL

Open Enrollment

Employee Number 15423 Vanderleet, John W. Elected Total

Effective Date 01/01/2008

Double-Click on Plan Line below for More Information  
Highlight Line & Choose Options to Display or Change

Guide for Benefits

Compare Rates

MEDICAL - One Election Is Required

Plan	Plan Description	Status	Amount
MED	Medical - Employee Only		9.75-
MED+FAM	Medical - Employee & Family		15.00-
MED+ONE	Medical - Employee + One		12.00-
MED00	Decline Medical		

Previous View New Selections Next

Microsoft Excel

File Edit View Insert Format Tools Data Window Help

SampleX-Cel.xls

	A	B	C	D	E	F	G	H	I	J	K
1											
2											
3											
4											
5											
6											
7											
8											
9											
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30											

Ready

## DCLICK Example

The first screen in this example displays the list of plans for the medical category. When the employee double clicks on the MED plan line, the second screen displays the document with specific plan information. When the employee double clicks on

the MED+FAM plan line, a different document displays with specific plan information. You can set up information for each plan line. If you do not set up information for the plan, a window displays stating there is no information set up for that plan.

0833455 Select Benefits

Options Help

ORACLE JD Edwards World URL

Open Enrollment

Employee Number 15423 Vandercoleet, John W. Elected Total

Effective Date 01/01/2008

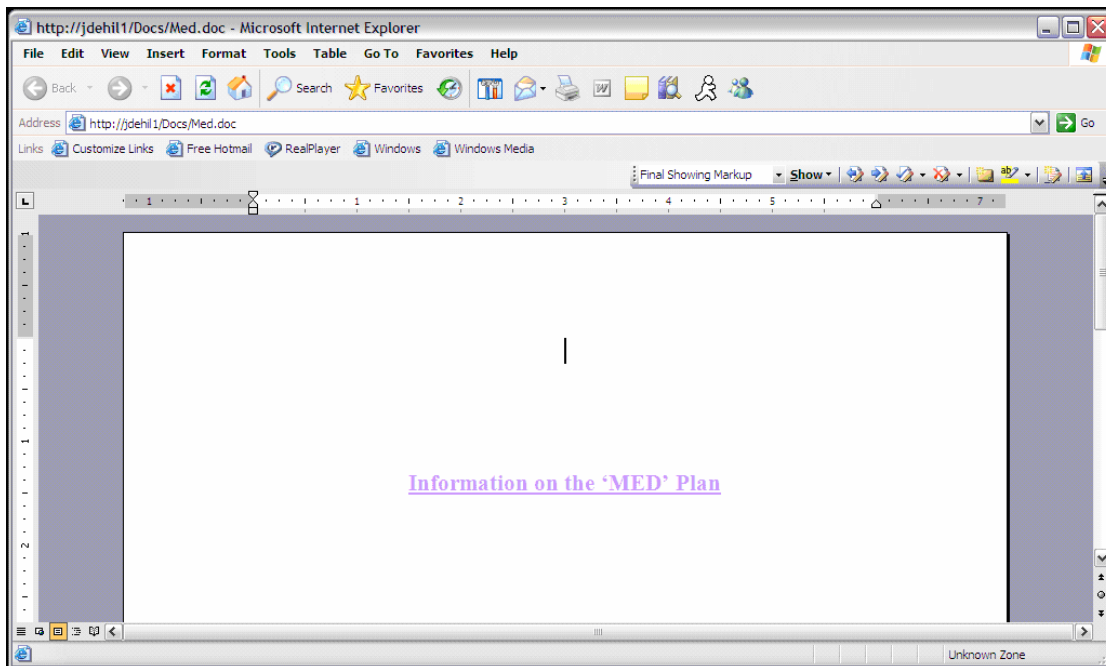
Double-Click on Plan Line below for More Information  
Highlight Line & Choose Options to Display or Change

Guide for Benefits

Compare Rates

Plan	Plan Description	Status	Amount
MED	Medical - Employee Only		9.75-
MED+FAM	Medical - Employee & Family		15.00-
MED+ONE	Medical - Employee + One		12.00-
MED00	Decline Medical		

Previous View New Selections Next



## PUSH1-NSF Example

The first screen in this example displays the time entry screen. When the employee clicks the Payroll News button, the second screen displays with the information you set up.

The screenshot shows a Microsoft Internet Explorer browser window. The address bar displays the URL <http://jdehl1/Docs/TEInfo.doc>. The document content features the title **Time Entry Announcement** in orange text. Below the title, a paragraph in orange text reads: "You can provide information you want your employees to see while they are in the process of entering their time. Create a button title in 'PC/Web Information Set Up' that defines or gets their attention. Remember this information can also be in the form of a spreadsheet or website." The browser's status bar at the bottom indicates "Unknown Zone".

The first screen in this example is the second screen of the Change Federal W-4 program. When the employee clicks Deduction Worksheets, the second screen displays the information you set up.

0601SS Change Federal W-4

Help

ORACLE JD Edwards World

URL

Deduction Worksheets

Enter or change all required (\*) or appropriate fields and press ENTER/ 'Next'.  
To print or email your current W-4 press ENTER or 'Next'.

Calendar Year: 2007  
NEW W-4:  
Employee Number: 15423 John W. Vandercleet

5. Total number of allowances you are claiming (from Personal Allowances Worksheet, Line H, or from Deduction and Adjustments and Two-Earner/Two Job Worksheets, if they apply). 6 \*

6. Additional amount, if any, you want to withhold from each paycheck. .00

7. Click on the box next to the items below that apply to you:

☐ Last year, did you have a right to a refund of ALL Federal Income Tax withheld because you had no tax liability?

☐ This year, do you expect a refund of ALL Federal Income Tax withheld because you expect to have NO liability?

☐ If you answered 'Yes' to two questions above, do you want to claim exemption from withholding for 2007 ?

Previous Next

http://jdehil1/Docs/W4%20Worksheets%20%20%203.doc - Microsoft Internet Explorer

File Edit View Insert Format Tools Table Go To Favorites Help

Back Forward Stop Home Search Favorites

Address http://jdehil1/Docs/W4%20Worksheets%20%20%203.doc

Links Customize Links Free Hotmail RealPlayer Windows Windows Media

Final Showing Markup Show

Form W-4 (2005) Page 2

**Deductions and Adjustments Worksheet**

Note: Use this worksheet only if you plan to itemize deductions, claim certain credits, or claim adjustments to income on your 2005 tax return.

1 Enter an estimate of your 2005 itemized deductions. These include qualifying home mortgage interest, charitable contributions, state and local taxes, medical expenses in excess of 7.5% of your income, and miscellaneous deductions. (For 2005, you may have to reduce your itemized deductions if your income is over \$145,950 (\$72,975 if married filing separately). See Worksheet 3 in Pub. 919 for details.) . . . 1 \$

2 Enter: { \$10,000 if married filing jointly or qualifying widow(er)  
\$ 7,300 if head of household  
\$ 5,000 if single or married filing separately } . . . . . 2 \$

3 Subtract line 2 from line 1. If line 2 is greater than line 1, enter "-0-" . . . . . 3 \$

4 Enter an estimate of your 2005 adjustments to income, including alimony, deductible IRA contributions, and student loan interest . . . . . 4 \$

5 Add lines 3 and 4 and enter the total. (Include any amount for credits from Worksheet 7 in Pub. 919) . . . . . 5 \$

6 Enter an estimate of your 2005 nonwage income (such as dividends or interest) . . . . . 6 \$

7 Subtract line 6 from line 5. Enter the result, but not less than "-0-" . . . . . 7 \$

8 Divide the amount on line 7 by \$3,200 and enter the result here. Drop any fraction . . . . . 8

9 Enter the number from the **Personal Allowances Worksheet**, line H, page 1 . . . . . 9

10 Add lines 8 and 9 and enter the total here. If you plan to use the **Two-Earner/Two-Job Worksheet**, also enter this total on line 1 below. Otherwise, stop here and enter this total on Form W-4, line 5, page 1 . . . . . 10

**Two-Earner/Two-Job Worksheet** (See Two-earners/two-jobs on page 1.)

## Change Federal W-4 PUSH3-NSF Example

The first two screens in this example illustrate the first and third screens of the Change Federal W-4 program. If an employee completes the checkbox for question 4 on the Change Federal W-4 screen, the Acceptance screen displays with Soc Security Website button. The employee can click Soc Security Website to access the third screen in this example, which is a URL you set up.

0601SS Change Federal W-4

Help

ORACLE JD Edwards World URL

Allowances Worksheet

Email HR

Calendar Year: 2007  
NEW W-4:

Employee Number: 15423

1. Name and Address:  
Name - First, Middle Initial, Last John W. Vandercleet  
Home Address Line 1 2837 E. Redcliff Drive  
Address Line 2  
City Denver  
State CO  
Postal Code 80223

2. Social Security Number: 460-01-5423

3. W-4 Marital Status: \* ☐ ☒ ☐

NOTE: If married but legally separated, or your spouse is a non-resident alien, select 'Single'.  
4. Click on the box if your last name differs from your last name on your social security card. ☒ ☐ ☐

Next

Enter or change all required (\*) or appropriate fields and press ENTER/ 'Next'.  
To print or email your current W-4 press ENTER or 'Next'.

0601SS Change Federal W-4

Help

ORACLE JD Edwards World URL

Calendar Year: 2007  
NEW W-4:

Employee Number: 15423 John W. Vandercleet

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

☒ \* I Accept  
Click to submit or approve form.

Your Request has been Submitted.

Because your social security card does not have your current legal name, you must call 1 866 772-1213 to receive a new card. Soc Security Website

Previous Print Email Copy Approve

Print or email your current or new W-4.





## Optional Set up for Change Federal W-4

The Change Federal W-4 program allows great flexibility for the type of information that you set up for employees to access.

This program does not provide the worksheets you normally associate with the Federal W-4 form. However, you can provide access to a worksheet and other form information using the PUSH1-NSF and PUSH2-NSF buttons. Additionally, you can set up different information for employees to view on each of the three screens in the program.

For example, you can set up the first screen with general information about using the program, the IRS website, or the Personal Allowances Worksheet for the W-4 form. You might also choose to set up the second screen to provide access to all three W-4 worksheets or only specific worksheets, for example Worksheets 2 and 3.

You can only use the PUSH3-NSF button on the third screen of the Change Federal W-4. It provides access to the Social Security Administration website where the employee can change their name if it does not match their Social Security card. The button displays adjacent to the name difference warning after they approve changes on the W-4.

## About PC/Web Access Setup Processing Options

Instructions for PC/Web Access Setup, including descriptions to set up each key field, are at the bottom of each set of processing options for each program. Access the processing options from the Employee Resource Setup menu (G08ESS). For example, to access the processing options for Select Benefits, enter 14 on the command line and click DW Processing Options (F18). The PC/Web Access Setup



program accesses the processing option fields of each program for verification during setup.

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**Note:** JD Edwards World recommends that you do not change these processing options. Other self-service programs access PC/Web Access Setup.

---

## Before You Begin

- Set up events using the Event Setup program.
- Acquire documentation from medical, dental, insurance, etc. providers or create your own documentation for your employees to review. You must place the file in the Docs folder on the deployment server.
- Do not change the processing options for any of the programs.
- Do not change UDC tables 00/DO for documents and 00/JE for J Walk Events.

## To set up PC/Web Access



From Employee Resource Setup (G08ESS), choose **PC/Web Access Setup**

On PC/Web Access Setup, complete the following fields:

- Event
- Company
- Country
- Program Name
- Version
- J Walk Event
- Access Type
- Header Field Value
- PC/Web Name&Path

Field	Explanation
Event	This is a "Generic" Status Code used by the HR Application. Examples of where/why it is used are as follows: Plan Master Rates (P083203). Uses it to flag "Active" or "Inactive" rates associated with a given Plan/Option.
Company	The company number in which the employee generally resides. <i>Screen-specific</i> Use this field to set up similar events for various companies.
Country	Enter a UDC (00/CN), for the country. <i>Screen-specific</i> Use this field to set up similar events for different locations of your company.
Program Name	The identification, such as program number, table number, and report number, that is assigned to an element of software.

Field	Explanation
Version	<p>A user-defined set of specifications that control how applications and reports run. You use versions to group and save a set of user-defined processing option values and data selection and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process, you must choose a version.</p>
JWalk Event	<p>Enter a UDC (00/JE), for the type of event.</p> <p><i>Screen-specific</i></p> <p>For example, choose POPEN, PUSH1, PUSHE 2, DCLICK, and so forth.</p> <p>For Enter Time, Change Address, and Change Participant Information, enter PUSH1-NSF.</p> <p>For Change Federal W-4, enter PUSH2-NSF or PUSH3-NSF.</p>
Access Type	<p>Enter a UDC (00/DO), for the type of document.</p> <p><i>Screen-specific</i></p> <p>For example, choose a document, spreadsheet, PDF, and so forth.</p>
Header Field Value	<p>Enter the benefit category for Select Benefits. For example, enter MEDICAL, DENTAL.</p>
Subfile Field Value	<p>Enter the benefit plan for Select Benefits. For example, enter MED, MED+FAMILY, DENTAL.</p>
PC/Web Name&Path	<p>This is where examples will be given as to how the PC/Web Name and Path should appear. At least one example will be given for a document, spreadsheet and website.</p> <p><i>Screen-specific</i></p> <p>Enter the only the filename for the documents employees access for benefits.</p>
Button Title	<p>A 20 character generic description.</p> <p><i>Screen-specific</i></p> <p>Enter only letters for the title you want to appear on the button.</p>



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# Additional Setup Considerations

## Setting Up Your Self-Service System

For each of the programs that employees access, there are additional setup considerations you should perform on your system.

### Select Benefits

#### Category Rules

You use category rules in the Self-Service programs in the same way as you use them in the production environment. The description for the category rule displays to the right of the category on the Select Benefits plan screen. You cannot set up more than one plan with the category rule R (required). For Open Enrollment, Retirement, and New Hire events, the system requires the employee to enroll in at least one plan in each category. Using either category rule R or O (optional), the system limits the employee's choice to one plan for a specific category.

#### Default Plans Processing Option

For the Open Enrollment, Retirement and New Hire events, when you set the Default Plans processing option to automatically enroll the employee in the default plan, the employee must elect or change a plan. The employee cannot continue if they do not elect or change a plan. For the Life Change and Other events, when the employee clicks Cancel to exit, one of the following screens might display:

- Dependent or beneficiary screen displays if the default plan requires the employee complete this information
- Option or amount window displays
- Plan screen containing the status of Elected.

The employee can either accept this plan or elect a different plan.


#### Process Ineligible Enrollment Processing Option

JD Edwards World recommends that you leave the Process Ineligible Enrollment processing option set to 1. If you change the value to blank, this allows the system to process ineligible enrollment and can make the approval process cumbersome.

#### Processing Options


See [Enrollment - Rules and Eligibility SS \(P08334SS\)](#)

## Plans with Options

	From Benefits Administration (G08B1), choose <b>Plan Master Information</b>
---	---

Plans with options cannot include an employee-only option. The system evaluates the value in the Dependent/Benef field on the Plan Information screen to determine whether the employee can enroll family members in the plan. You can set up various dependent-level options, for example you can set up employee and spouse or employee plus one dependent.

## Dependents and Beneficiaries

	From Benefits Administration (G08B1), choose <b>Plan Master Information</b>
---	---

You must determine which plans require dependents and beneficiaries. You must set the Dependent/Benef field on the Plan Information screen with a D for dependent or B for beneficiary if you require employee to dependents or beneficiaries with the plan. When an employee enrolls in a plan that requires this information, the Select Benefits program displays the Dependent or Beneficiary screen. The system requires they select a participant to continue.

## Rates Based on Plans with Options


If you are changing the rates for the options for a new year, you can copy the current year's plan and change the name and description. For example, if the plan is EMP + SP might be EMP + SPO. Additionally, you can:

- Add the year to the end of the description of each plan
- Copy the options for the current plan to the new plan
- Increase the rates
- Add the new plan to the category for the appropriate benefit groups
- Provide employees with instructions for enrollment in the new plan

## Eligibility

You cannot use eligibility rules which set the effective date prior to the enrollment date in Open Enrollment with and other controlled events. The eligibility date conflicts with the effective date of the event and causes unpredictable results.

## Plan Descriptions

	From Benefits Administration (G08B1), choose <b>Plan Master Information</b>
---	---

It is essential that you enter a concise description for each plan. While the Description field on the Plan Information screen accommodates 30 characters, the Select Benefits screen displays 28 characters of the plan description.

## Enter Time

### Restricted Pay Types for Employees Online

You must set up pay types in UDC 07/OP for the Online Pay Type field. You can change the descriptions to suit your business need, however the screen displays 15 characters. You must include pay types in Labor Distribution for employees in this UDC.

### Load Pay Type Description Processing Option

JD Edwards World recommends you leave this processing option blank so employees or their approving manager can enter comments. If you enter a value of 1 in this processing option, the pay type description displays in two places on one line for each time record and employees cannot access the Comment field.

### Processing Options:p

See [Time Entry By Employee \(P061121S\)](#)

### Labor Distribution

If you set the Automatically Split Time Based on Labor Distribution processing option to 1, the Labor Speed Entry button displays on the time entry screen. When the employee exists in the Labor Distribution program, the employee chooses a Date Worked in the header of the Time Entry screen, clicks Labor Speed Entry, and the system splits and enters their hours as follows:

- For the % (percentage) method of distribution, a window displays for the employee to enter the total number of hours worked. After the employee approves their time entry, the system distributes the hours which display on the Time Entry screen.

06LDH Labor Distribution Pay Period

Functions Tools Help

✓ ✗ ?

Labor Dist. Method = Percentage

Enter Pay Period Hrs: 46

**Time Entry**  
 Employee Number: 15421 Simms, Lucille S.  
 Date Worked:   
 Hours: 46.00  
 Labor Speed Entry:  LS Amount:

Highlight Line and Choose Options to Delete or Cancel

Payroll News  
Email Payroll

Summary Detail

Type of Time	Hours	Date Worked	Comment
Regular	27.60	03/09/07	
Regular	18.40	03/09/07	

Delete All Print Email Copy Approve

- For the H (hours) method of distribution, the system enters the hours on the Time Entry screen.

**Time Entry**  
 Employee Number: 15422 Lucenzio, Mario B.  
 Date Worked:   
 Hours: 40.00  
 Labor Speed Entry:  LS Amount:

Highlight Line and Choose Options to Delete or Cancel

Payroll News  
Email Payroll

Summary Detail

Type of Time	Hours	Date Worked	Comment
Regular	32.00	03/09/07	
Regular	8.00	03/09/07	

Delete All Print Email Copy Approve

## View Vacation-Sick)

The View Vacation-Sick program is very flexible and allows management to set up all four types of accruals. Managers limit which accrual types employees view by entering accrual types in UDC 07/S5. They can also enter a concise description for the accrual type. This program uses pay types and Dependent Beneficiaries Accruals



for accruals as they are setup in the Payroll Month PDBA Summary History (F06146) and Fiscal/Anniversary Year History (F06147) files.

### 07/S5 UDC Table

This UDC table includes the V (Vacation Hours) and S (Sick Hours) accrual types. Do not delete or change the blank record at the beginning of this table as this record allows the system to include more than one vacation or sick hour accrual in the balance for each employee to view. It also allows Payroll managers to add other accrual types to the UDC. Additionally, the Accrual Type for Employee Self-Service field works in conjunction with this UDC. You can change the description of this field or delete it from the UDC table.

### View Vacation-Sick Processing Options

The View Vacation-Sick processing options (P06093S) include additional information on the last screen for setting up PC/Web Access Setup for this program.

### Processing Options

See [View Vacation-Sick \(P06093S\)](#)

## Change Address

You can set up your system to retain the former address of an employee in your system when the employee changes their address or the address of a family member. Choose the Address Book Constants on the Address Book Setup menu (G0141) and enter 1 in the Address by Effective Date field. After you upload the approved employee requests for address changes, choose the Effective Address Update on the A/B Advanced & Technical Operations menu (G0131). Run a version with a run date beyond the last effective upload date in Address Approval. The system prioritizes the address records for these employees so the most recent address displays.

If you clear this constant or enter 0, only the current address record for each employee and family member exists in your system.

## Change Participant Information

You can set up your system to have an additional text window display when the employee adds a participant. This window displays when the employee clicks Add. The employee must review the message and close the window to enter information about the new participant. You must set up this window within J Walk files. See the *Self-Service Configuration Guide* for more information.

Additionally, you can use the processing option to display full or partial details on the form.

### Processing Options

See [Dependents/Beneficiaries Assignment \(P08336SS\)](#)

## Federal W-4

You can verify UDC 07/W4 for Marital Status and set the processing options for the following three W-4 programs.

### Change Federal W-4 UDC

UDC 07/W4 for Marital Status is set up for the Change Federal W-4 program and the values and descriptions match those on the 2007 Federal W-4 Form. You should change these only to comply with Federal changes.

### Change Federal W-4 Processing Options

You specify the year for the W-4 form employees' view and change using the Change Federal W4 (P0601SS) processing options. Additionally, you can enter the phone number for the Social Security Administration in the processing options.

Information regarding PC/Web Access Setup is available at the bottom of the processing options.

### Processing Options

See [Change Federal W4 \(P0601SS\)](#)

### Federal W-4 Approval Processing Options

When you upload approved employees request for changes, the system updates the Federal W-4 Master File (F06303). Enter 1 in the Files to be Updated processing option and the system updates the Employee Tax Exemptions/Overrides file (F06017) with the employees' requests.

### Processing Options p

See [Federal W-4 Approval \(P0601AP\)](#)

### Federal W-4 Inquiry/Maintenance Processing Options p

Use the Federal W-4 Inquiry/Maintenance processing options to control the following:

- Operation Available to User. Enter 1 to allow users to use the Add and Change options on the Change W-4 screen.
- Current Phone Number for Federal IRS. Enter the Social Security Administration phone number and the phone number prints on the report the employee generates.
- Printed Report. Enter 1 to add questions 8 through 10 and company information on the W-4 report.

## Processing Options

See [Federal W-4 Inquiry/Maintenance \(P06303\)](#)



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## **3 Using Employee Self-Service**



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# Overview to Using Employee Self-Service

Using Employee Self-Service consists of the programs that employee's use on the Employee Resource Online menu (G08ESSJW) to perform the following:

- Change Federal W-4 information
- Change address information
- Enter time records
- Choose Benefit plans
- Add a participants
- Change information for existing participants
- Track vacation balances, sick balances, or other accrual information.

The screens in Employee Self-Service include buttons for various employee options. They include:

- Email HR: The employee can send an e-mail to the e-mail address, usually the HR Manager, set up in Event Setup.
- Print: The employee can print a list of their choices or entries. See *Appendix A* for a sample.
- Email copy: The employee can send an e-mail, which includes a list of their choices or entries, before and after they confirm their choices.

Additionally, the employee can access Payroll News and view information the HR requests for that Self-Service program.





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# Selecting Benefits

## About Selecting Benefits

The employee accesses a variety of screens and windows using the Select Benefits programs. The screens and windows vary depending on which benefit the employee accesses, whether the plan includes options, and if the employee wants to include dependent/beneficiary information.

JD Edwards World recommends that you run the Benefits Setup File Download after management approves and uploads data from each major enrollment event. An Open Enrollment period might last for several weeks. If an employee incurs a life event during the Open Enrollment period, they can use the Life Change event to enter their requests. The HR Manager can approve and upload the individual request without affecting their Open Enrollment as long as the effective date is prior to the Open Enrollment effective date. However, the HR Manager must not download benefits data or it overwrites all data in the temporary files. JD Edwards World recommends that you set the date range for the Life Change event to an extensive period of time, for example from the beginning of a financial quarter to the end of the financial quarter, which allows Open Enrollment and Retirement to overlap this date range.

## Choosing Categories

The Category screen includes all of the categories from which employees can choose in their benefit group. For the Open Enrollment, Retirement, and New Hire events, the system enters the effective date in the header from the Event Setup file (F08EVNT). For the Life Change and Other events, the employee must enter an effective date or choose one from the calendar.

To make selections for Open Enrollment, Retirement or New Hire events, the employee clicks Start. For the Life Change or Other events, the employee clicks the category, such as MEDICAL, to make changes to plans.

This screen also includes the following buttons:

**Email HR:** The employee can send an e-mail to the e-mail address, usually the HR Manager, set up in Event Setup.

**View Current Elections:** The employee can access the Current Elections screen .which displays current (active) plan enrollment for the employee.

**View/Approve Selections:** For Life Change and Other events only, the employee can review their elections and then proceed to confirm their benefits.

## Choosing Plans

Employees use the Plan screen to review, choose, change or stop enrollment in a plan.

When an employee is currently active in a plan, the Status field contains the value of Active. Additionally, if the plan includes an option, the Option field contains a value. If a plan is set up as the default plan, the Default field contains a value.

If you attach information for this plan, such as a medical insurance documentation, the employee can access the information from this screen.

If you set up category rules, One Election Required (R) or One Election Optional (O) display next to the category. The employee must choose only one plan when the category rule is R. For Open Enrollment, Retirement, and New Hire events, the employee cannot continue through the benefit selection process if they do not choose a plan or choose too many plans.

The Plan Screen displays directions and error messages in the center of the screen to aid employees through this process. When the employee clicks on the error message, another screen displays with an explanation and the resolution. The employee must resolve the error to continue through this process.

The Plan screen also includes the View New Selections button for the employee to review a list the changes and new plans they choose during this benefit selection process. The View New Selections screen contains only the most recent choices, unless the employee chooses a plan that requires dependents or beneficiaries. The employee can view the new election after they choose another benefit on the next Plan screen. For example, the employee chooses an employee-only medical plan and continues by choosing a dental plan. When the employee clicks View New Selections, only the medical plan displays on the View New Selections screen. The medical and dental plan do not display until the employee chooses another benefit.

There are several windows the employee can access from the Plan screen. When the employee chooses the Display Information option, a window displays with all of the employees prior and current enrollment information for this plan. If the employee is not active in a plan, the window displays with no data in the fields. When the employee elects a plan with no options or payroll deductions, the Status field for that plan changes to Elected. When the employee elects a plan with options and payroll deductions, a window displays for them to choose options or enter payroll deduction amounts. When the employee elects to Re-Enroll or Change Enrollment for a plan in which they are currently active, a window displays for them to verify the prior dates of enrollment and the new beginning date of enrollment. When the employee chooses Stop or End Plan, the Status field changes to Stopped for that plan in which they are currently active.

## Choosing Participants

When the plan requires a dependent or beneficiary, the Dependent or Beneficiary screens display. The employee must enter or choose at least one dependent or beneficiary and confirm the information before they can continue. If the employee is currently active in the plan, the screen displays all of the employee's participants. If an employee has recently entered a new participant using the Change Participant

Information program and the data in the production files is not current prior to the employee accessing events, this participant does not display in the list.

On the Dependents screen, the employee can click Select ALL Dependents or they can select them one at a time. The system enters a checkmark to indicate a participant's enrollment.

For beneficiaries, the employee must confirm or change each beneficiary and complete the Beneficiary Type and Percentage Allotted fields.

## Making Changes

The employee can make changes anytime prior to the end of the benefit period. When the employee elects a plan and returns to the Category screen, they can continue to access that category of plans. If they want to make changes to options or amounts for a plan that they chose, such as adding an option or changing an amount, they must elect the plan again and make the changes.

When the employee elects a plan and then wants to elect a different plan, they must choose Stop or End Plan for the first plan and then elect a different plan. For Life Change or Other events, the employee enters the same category to elect a different plan. For Open Enrollment, Retirement, and New Hire events events, the employee must return to the Plan screen from the Confirmation screen. If the employee wants to re-enroll for a plan and make changes to an option or an amount, they can do so from the Plan screen.

The employee can access the Plan screen from the Confirmation screen if they want to make any changes. If the employee confirms the plan on the Confirmation screen, they must Re-Enroll or Change Enrollment to change options, payroll deductions, or to choose a different date.

## Confirming Benefits

The Confirmation screen lists all of the plans the employee elects or changes and the participants they chose for each plan during this benefits event. After confirming and exiting benefit events, when an employee accesses the Plan screens and uses the same effective date, all elections display as Active.

The employee can access the appropriate screen, from the Confirmation screen, to make changes to plan elections or participants if necessary.

For the Open Enrollment, Retirement, and New Hire events, the employee clicks Next or Previous to save their choices and return to the Confirmation screen. Life Change or Other events, the employee must click Cancel to save their changes and return to the Confirmation screen.

This screen also includes the following buttons:

Print: The employee can print a list of their choices. See *Appendix A* for a sample.

Email copy: The employee can send an e-mail, which includes a list of their choices, before and after they confirm their choices.

Submit for Approval: The employee submits their choices for approval.

## Accepting Benefits

The Electronic Signature Acceptance window displays when the employee submits their choices for approval.

When the employee clicks I Accept, the system includes the event, employee number, date, and time of acceptance in the electronic signature. The system saves the employee selections in the temporary files and creates a confirmation number for the employee and their choices. The system stores the confirmation number, time, date, and other markers with each record verifying the employee's choices. The Confirmation screen displays and the employee can print or send an e-mail of benefit selections which includes the confirmation number.

If the employee clicks Previous, the Confirmation screen displays.

### What You Should Know About

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<b>Electronic Signature Requirements</b>	
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	It must be clear to the employee when they are entering into an agreement with the company.
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	The employee must have the ability to access a hard copy and electronic copy of their agreement.
--	--

	You must provide storage of the employee's choices.
--	---

	You must be able to access the records you store of employees' choices, make them available at the employee's request, and be able to view them for comparison. You can access the records using an inquiry program or World Writer versions.
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## Accessing Benefits Screens

There are several ways for employees to move between the benefit screens, depending on the screen and the event. Prior to moving to another screen, the employee should click Enter if they want the system to save their choices.

The employee can click Exit on the Plan screens and the Category screen displays. When the employee clicks Cancel to exit the Category screen, a warning displays that the system does not save elections when they close the program.

For Open Enrollment, Retirement, or New Hire events:

- When the employee clicks Next on the Category screen, the last Plan screen displays.
- When an employee makes a choice on the Plan screen, the system saves the choices prior to:
  - Clicking Next, which displays the next available plan or the New Changed Elections screen.
  - Clicking Previous, which displays the Category screen.
- Clicking Exit on the Plan screen does not save their choices and the Category screen displays.

For Life Change and Other events, when the employee makes plan elections and then clicks Exit to close the Category screen, a warning displays that the system does not save elections when they exit the program.

When the employee confirms their choices, the Confirmed Elections screen displays.

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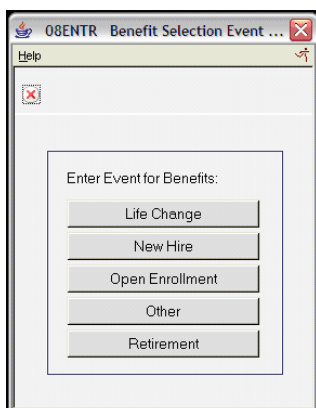
**Note:** JD Edwards World does not recommend that you exit Select Benefits by clicking Close (the X in the upper right corner of the screen). A window displays warning the user the session will end. Clicking Yes ends the benefits session.

---

## To select benefits

Following is an example of a current employee selecting medical and dental benefits.

1. On Benefit Selection Event, choose an event (Open Enrollment).



2. On the Category screen, perform one of the following:
  - To review current benefits, click View Current Elections.
  - To send an e-mail to the HR manager, click Email HR.
  - To begin benefit enrollment, click Start.

0833455 Select Benefits

Help

ORACLE JD Edwards World URL

Open Enrollment Elected Total 18.30-

Employee Number 15126 Cane, Phillip R.  
Effective Date 01/01/2008

Selection Order

MEDICAL  
DENTAL  
LIFE  
VISION  
SPENDING

Press **Start** to Begin

View Current Elections  
03/09/07

Email HR

The Current Elections screen displays with the employee's current benefits.

0833455 Select Benefits

Help

ORACLE JD Edwards World URL

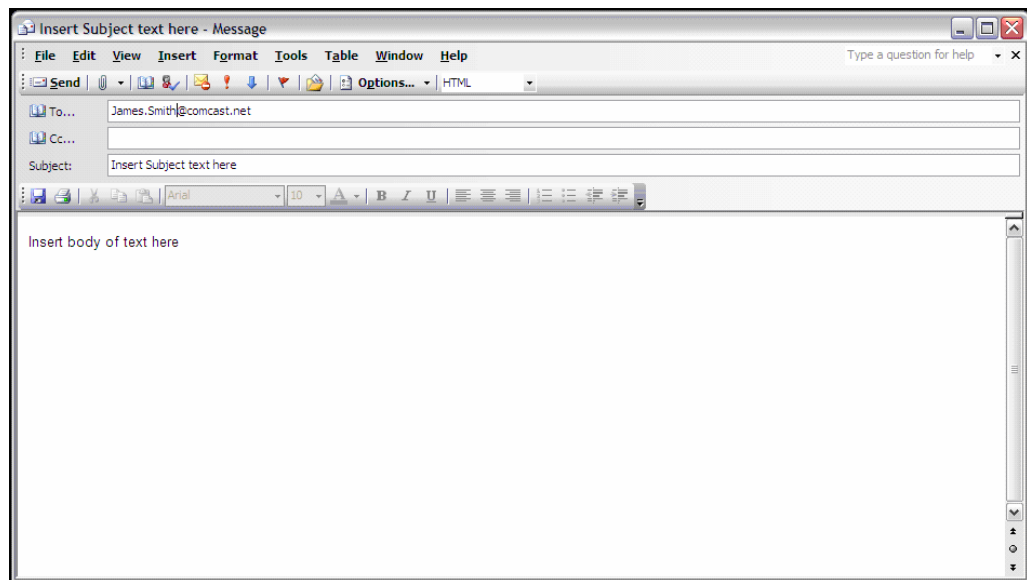
Life Change Current Elections

Employee Number 15424 Ming, Lee W.  
Effective Date 05/01/2007  
Total Employee Cost 15.25- Per Pay Period

Listed below are the plans currently enrolled in with HR.  
Press Cancel to return.

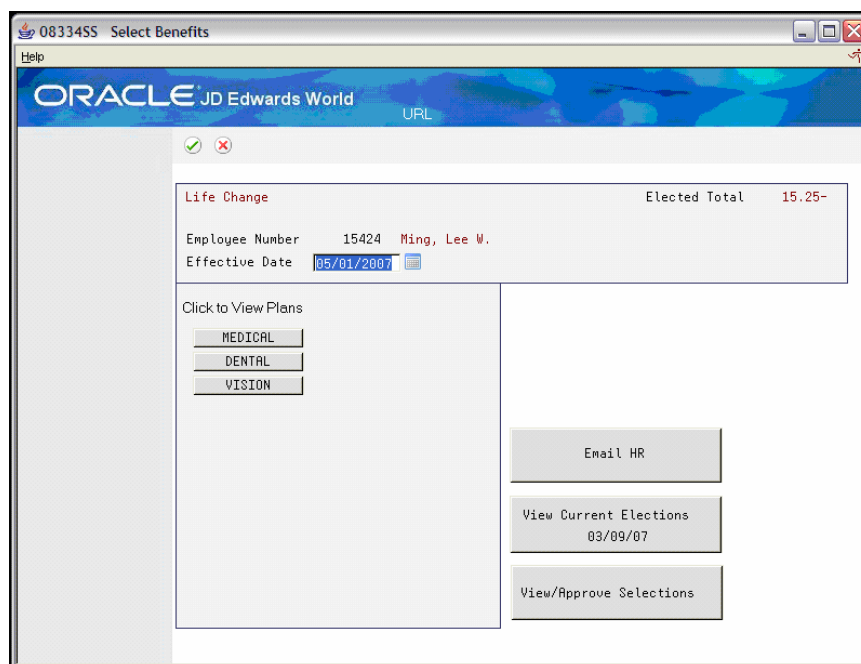
Benefit Category	Benefit Plan Selected	Employee Cost Per Pay Period
DENTAL	Dental - Employee	5.50-
MEDICAL	Medical - Employee	9.75-

An e-mail editor displays to send an e-mail to the HR manager.



The Category screen displays to make benefit selections.

3. On the Category screen, click MEDICAL.



4. On the Plan screen, perform one of the following:
  - Choose a medical plan, right-click and choose an option to elect, change or stop enrollment.
  - Double click a line for more information or choose a medical plan, right-click and choose Display Information to review additional plan information.

083345S Select Benefits

Options Help

ORACLE JD Edwards World URL

Open Enrollment

Employee Number 15126 Cane, Phillip R. Elected Total 18.30-

Effective Date 01/01/2008

Double-Click on Plan Line below for More Information  
Highlight Line & Choose Options to Display or Change

Guide for Benefits

Compare Rates

MEDICAL - One Election Is Required

Plan	Plan Description	Status	Amount
MED	Med	Active	9.75-
MED+FAM	Med		15.00-
MED+ONE	Med		12.00-
MED00	Dec		

Previous View New Selections Next

The Dependent and Beneficiary screens display with current dependents and beneficiaries.

5. On the Dependent screen, perform one of the following and click Approve:

- Click YES to select all dependents
- Click the Elect field for each dependent.
- Double-click the Elect field to exclude the dependent.

The Elect field contains a checkmark to indicate the participant is a dependent or a question mark to indicate they are not a participant.

083345D Select Benefits

Help

ORACLE JD Edwards World URL

Open Enrollment

Employee Number 15126 Cane, Phillip R.

Plan DEN+FAM Dental - Family 2007

Plan Option FAM EE plus family

Effective Date 01/01/2008

Dependent Selection

Select ALL Dependents Yes

Dependent / Beneficiary Name	Relationship	Plan	Plan Option	Elect
Cane, Melissa B.	Spouse	DEN+FAM	FAM	✓
Cane, Isabelle S.	Child	DEN+FAM	FAM	✓
Thomas, Alice P.	Parent			?
				?
				?
				?
				?
				?
				?
				?

Exit Approve



6. On the Beneficiary screen, perform one of the following:

- Click the Elect field for each beneficiary.
- Double-click the Elect field to exclude the beneficiary.

The Elect field contains a checkmark to indicate the participant is a beneficiary or a question mark to indicate they are not a beneficiary.

7. Complete the following fields for each beneficiary and click Approve:

- Relationship
- Beneficiary Type
- Percent Allotted

Dependent / Beneficiary Name	Relationship	Beneficiary Type	Percent Allotted	Elect
Cane, Melissa B.	Spouse	C1	75	✓
Cane, Isabelle S.	Child	C2	25	✓
Thomas, Alice P.	Parent			?

8. On Approval Acceptance, click Yes to confirm dependents and Beneficiaries.

The Plan screen displays containing changes or new information.

0833455 Select Benefits

Options Help

ORACLE JD Edwards World URL

Open Enrollment

Employee Number 15126 Cane, Phillip R. Elected Total 18.30-

Effective Date 01/01/2008

Double-Click on Plan Line below for More Information  
Highlight Line & Choose Options to Display or Change

Guide for Benefits

Compare Rates

Plan	Plan Description	Status	Amount
MED	Medical - Employee	Changed	9.75-
MED+FAM	Medical - Employee & Family		15.00-
MED+ONE	Medical - Employee + One		12.00-
MED00	Decline Medical		

Previous View New Selections Next

9. Click Cancel to access the Category screen and choose Dental.

0833455 Select Benefits

Help

ORACLE JD Edwards World URL

Life Change Elected Total 15.25-

Employee Number 15424 Ming, Lee W.

Effective Date 05/01/2007

Click to View Plans

MEDICAL

DENTAL

VISION

Email HR

View Current Elections 03/09/07

View/Approve Selections

10. On the Additional Options window, choose a dental plan.

Opt	Description	Amount
FAM	EE plus family	13.00-
ONE	EE plus one	8.00-

11. On Plan Information, confirm the information and click Approve.

Plan: DEN+FAM Dental - Family 2007

Begin Date: 01/01/08 Status: Active

Ending Date: Status:

View Plan Options and Select:

Plan Option: FAM EE plus family

Exit Without Approval Approve

12. On the Dependent screen, perform one of the following and click Approve:

- Click Select ALL Dependents
- Click the Elect field for each dependent.
- Double-click the Elect field to exclude the dependent.

The Elect field contains a checkmark to indicate the participant is a dependent or a question mark to indicate they are not a participant.

13. On Approval Acceptance, click Yes to confirm dependents and Beneficiaries.

Have all the Dependents/Beneficiaries been selected for this plan?

Yes No

The Plan screen displays containing changes or new information.

To continue choosing benefits access the Category screen and choose a category.

14. On the Plan screen, click View New Selections to review changes.

Benefit Category	Benefit Plan Selected	Employee Cost Per Pay Period
DENTAL	Dental - Family 2007 FHM	13.00-
	Melissa B. Cane Spouse	
	Isabelle S. Cane Child	
MEDICAL	Medical - Employee	9.75-

15. On the View New Selections screen, perform one of the following:

- To print a copy of the new selections, click Print.
- To send an e-mail of the new selections, click Email Copy.
- To confirm choices and submit benefits for approval, click Submit for Approval.

You can access the Confirmation screen by clicking Next on the last Plan screen for Open Enrollment, Retirement, and New Hire events. You can access the Confirmation screen for Life Change and Other events by clicking Approve on the Category screen.

16. On The Confirmation screen, perform one of the following:

- To change plans or participants, right-click on a line and select Change.
- To print a copy of the new selections, click Print.
- To send an e-mail of the new selections, click Email Copy.
- To confirm choices and submit benefits for approval, click Submit for Approval.

0833455 Select Benefits

Options Help

ORACLE JD Edwards World

URL

Open Enrollment New/Changed Elections

Employee Number 15126 Cane, Phillip R.

Effective Date 01/01/2008

Total Employee Cost 116.78- Per Pay Period

Highlight Line and Choose Options to Make Changes

Benefit Category	Benefit Plan Selected	Employee Cost Per Pay Period
DENTAL	Dental - Family 2007 FHM	13.00-
	Melissa B. Cane Spouse	
	Isabelle S. Cane Child	
LIFE	Life Insurance Plan	5.98-
	Melissa B. Cane Spouse	
	Isabelle S. Cane Child	
MEDICAL	Medical - Employee	9.75-
SPENDING	Medical Spending Acco	85.00-
VISION	Vision - Premium	3.05-

Print Email Copy Submit for Approval

17. On the Electronic Signature Copy of Acceptance window, enter an e-mail address to e-mail a list of the choices.

Electronic Signature Copy of Acceptance

Help

Please enter the Recipient's e-mail address:

Melissa.Cane@comcast.net

Send Return to Benefits

18. On the Electronic Signature Copy of Acceptance window, perform one of the following:

- To print a copy of your benefit selections, click Print to Local Printer.
- To review your benefit selections, click View Report.
- To make changes, click Return to Confirmation Statement.

Electronic Signature Copy of Acceptance

Help

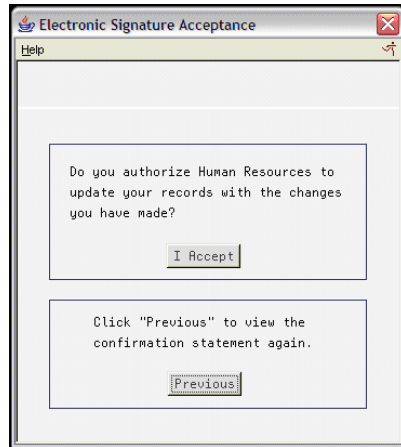
Please click on an option to select.

Print to Local Printer View Report

Return to Confirmation Statement

**19.** On the Electronic Signature Acceptance window, perform one of the following:

- To accept benefit selections, click I Accept.
- To return to the confirmation statement, click Previous.



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# Entering Time

There are three screens or windows that the employee normally uses while entering time. The employee must first choose the type of time entry in the Time Entry Event window.

The Enter Time screen contains two different formats for entering and reviewing employee time records. The employee can choose either the:

- Summary tab to display one time record per line.
- Detail tab to display the detail entry fields, such as number of pieces, equipment, and so forth in several lines for one time record.

Additionally, the employee can access Payroll News and send an e-mail to Payroll from this screen.

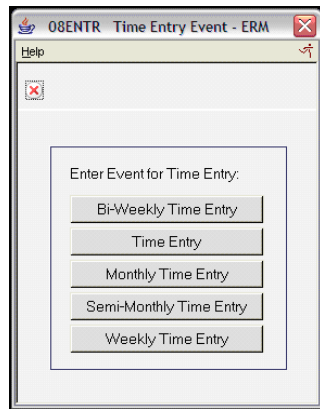
From the Enter Time screen, the employee can access a window containing a list of values for the Type of Time field.

The first time the employee uses the Time Entry program, the screen does not contain any data and the employee must enter the date in the Date field. JD Edwards World recommends that employees use the pay period end-date. Additionally, when employees use Labor Speed Entry for the first time, the description in the Type of Time field does not display until they approve the time records.

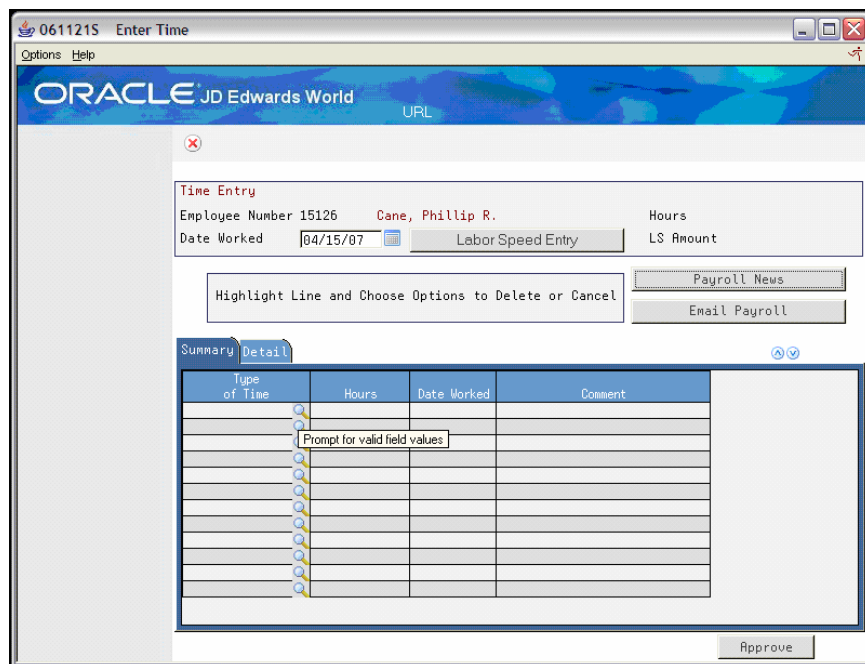
The employee must approve their time entry using the Electronic Signature Acceptance Screen. When the employee accepts their time entry, the system saves the record in a temporary file. The system creates a confirmation number which includes the employee number, date and time. This confirmation number and other electronic signature data verify the employee's choices for this event.

## To enter time

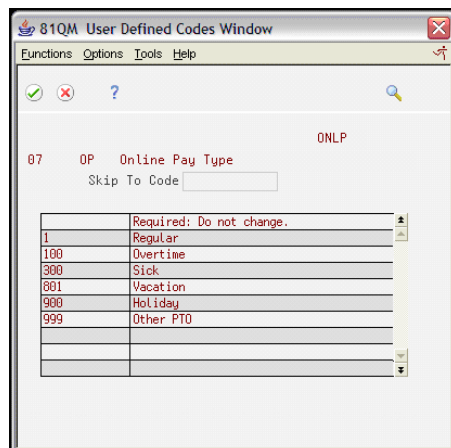
1. Choose the type of time entry in the Time Entry Event window. .



2. On the Enter Time screen, click Prompt for valid field values.



3. On the User Defined Codes Window, choose the type of time and click Ok.





4. On the Enter Time screen, complete the following fields and click Approve:

- Hours
- Date Worked
- Comment (optional)

Time Entry

Employee Number 15126 Cane, Phillip R. Hours

Date Worked 04/15/07 Labor Speed Entry LS Amount

Highlight Line and Choose Options to Delete or Cancel

Payroll News

Email Payroll

Summary Detail

Type of Time	Hours	Date Worked	Comment
Regular	40	04/05/07	Regular responsibilities
Equip:		Job Type:	Job Loc:
Shift:		Item:	Pieces:
Subldgr:	T		Tax A:
			Phs:
Overtime	6	04/06/07	Special client needs
Equip:		Job Type:	Job Loc:
Shift:		Item:	Pieces:
Subldgr:	T		Tax A:
			Phs:

Approve

Approve

5. On Electronic Signature Acceptance, perform one of the following:

- Click Accept and Return to return to the Enter Time screen.
- Click Accept and Exit to exit the Time Entry program.
- Click Previous to return to the Enter Time screen to make changes.

If you do not accept the records, the system does not save the time entry records.

Electronic Signature Acceptance

Help

Do you authorize Payroll to update your records with the changes you have made?

Accept and return Accept with Exit

Click "Previous" to return to Time Entry.

Previous

6. On the Enter Time screen, perform one of the following:

- Click Print to print a copy of the time records.
- Click Email Copy to send an e-mail with a copy of the time records to an e-mail address.
- Click Delete All to delete all time records.
- Choose a line, right click and choose Delete/Cancel to delete or cancel that time record.
- Choose a line and make changes.

If you change, delete or cancel time entry records, you must click Approve to approve the records.

**ORACLE** JD Edwards World URL

---

X [ ] [ ] X

**Options Help**

<div style="color: red; font-weight: bold;">Time Entry</div>		
Employee Number    15126 Cane, Phillip R.	Hours                  86.00	
Date Worked <input type="text"/>	<button>Labor Speed Entry</button>	LS Amount

Highlight Line and Choose Options to Delete or Cancel

 Payroll News  
 Email Payroll

Summary Detail

Ⓐ Ⓜ

Type of Time	Hours	Date Worked	Comment
Regular <input checked="" type="radio"/>	40.00	04/05/07	Regular responsibilities
Overtime <input checked="" type="radio"/>	6.00	04/06/07	Special client needs
Vacation <input checked="" type="radio"/>	40.00	Delete/Cancel	Out of Town - Family
<input type="radio"/>			
<input type="radio"/>			
<input type="radio"/>			
<input type="radio"/>			
<input type="radio"/>			
<input type="radio"/>			
<input type="radio"/>			
<input type="radio"/>			
<input type="radio"/>			
<input type="radio"/>			
<input type="radio"/>			
<input type="radio"/>			
<input type="radio"/>			
<input type="radio"/>			

Delete All      
  Print      
  Email Copy      
  Approve

## To enter time using labor speed entry

1. Choose the type of time entry in the Time Entry Event window. .

O8ENTR Time Entry Event - ERM

Help

Enter Event for Time Entry:

Bi-Weekly Time Entry

Time Entry

Monthly Time Entry

Semi-Monthly Time Entry

Weekly Time Entry

- 2. On the Enter Time screen, enter date in the following field:**

- Date Worked

0611215 Enter Time

Options Help

ORACLE JD Edwards World

URL

Time Entry

Employee Number 15126 Cane, Phillip R. Hours

Date Worked Labor Speed Entry LS Amount

Select the date from a calendar

Highlight Line and Choose Options to Delete or Cancel

Payroll News

Email Payroll

Summary Detail

Type of Time	Hours	Date Worked	Comment

Approve

3. Click Labor Speed Entry.
4. On Labor Distribution Pay Period, complete the following field and click Enter.
  - Enter Pay Period Hours

06LDH Labor Distribution Pay Period

Functions Tools Help

Labor Dist. Method = Percentage

Enter Pay Period Hrs: 46

The system distributes the hours appropriately and they display on the Enter Time screen.

5. On the Enter Time screen, click Approve.

[illegible]

6. On the Electronic Signature Acceptance Screen, perform one of the following:
  - Click Accept and Return to return to the Enter Time screen.
  - Click Accept and Exit to exit the Time Entry program.
  - Click Previous to return to the Enter Time screen to make changes.

If you do not accept the records, the system does not save the time entry records.

Electronic Signature Acceptance

Help

Do you authorize Payroll to update your records with the changes you have made?

Accept and return Accept with Exit

Click "Previous" to return to Time Entry.

Previous

7. On the Enter Time screen, perform one of the following:
  - Click Print to print a copy of the time records.
  - Click Email Copy to send an e-mail with a copy of the time records to an e-mail address.
  - Click Delete All to delete all time records.

- Choose a line, right click and choose Delete/Cancel to delete or cancel the time record.
- Choose a line and make changes.

If you change, delete or cancel time entry records, you must click Approve to approve the records.



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# Changing Participant Information

Employees use the Change Participant Information program (P08336SS) to add participants and change information about participants.

The Change Participant Information screen lists the employee's current participants. The employee can make changes to a participant's relationship or the beginning or end effective dates of a participant's status. Once the employee approves the additions and changes, the system stores the information in temporary files for management approval. Additionally, the employee can print and e-mail a copy of all of the changes.

At any time while using the Change Participant Information screen, the employee can review information from the HR Department by clicking the Info HR Needs button. The employee can also send an e-mail to the HR Department.

The Change Participant Information program comprises the following programs and files:

- Participants by Employee- ERM (P08336SS )
- Participant Information - ERM (P08901SS)
- Dependents/Beneficiaries X-Ref file (F08336)
- Participant File (F08901)

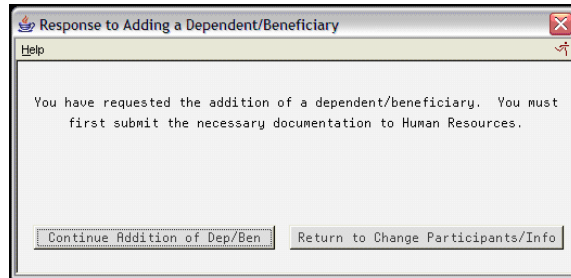
When the employee changes a participant's information on the Change Participant Information screen, they must enter an effective date for the change. If they continue to make changes for the participant on the Participant Entry screen, the effective date displays on the screen. The effective date applies to all changes. The system uses the effective date to manage the information between the two files and for the confirmation report and history. The Address Changes screen is part of the Change Address event and uses a separate effective date.

If the current record for the participant in the Dependents/Beneficiaries X-Ref file (F08336) includes a plan, after approving and uploading requests for participant changes, you can review addition records in the Dependents/Beneficiaries by Employee program (P08336) from the Dependents & Beneficiaries menu (G08B12). The system adds a record for each change to a participant in the F08336 file which does not include a plan.

The system maintains separate records for requests and approved participant relationship data, and the start and end dates of enrollment. For example, when an employee does not enter effective dates for a participant a record exists in the system without dates. Later the employee enters a start date and the upload program enters an end date for the first record (without dates) and creates a new record with the start date the employee enters. When the employee accesses the first record (without dates) and attempts to enter an end date, the program does not allow the employee to update that record because the record with an end date exists.

When HR changes the start and end dates on the first record (without dates), the Dependents/Beneficiaries by Employee program deletes the first record.

The Change Participant Information program can include an additional window which displays after the employee clicks Add. This window displays a message and requires the employee to choose how to continue entering information about the new participant. The message can be up to 250 characters long. You must set up this window within J Walk files. See the *Self-Service Configuration Guide* for more information.



## To add a participant

1. On Change Participant Information, click Add.

Number	Name	Relationship	Effective From	Effective Thru
32934	Moore, Dan R.	S Spouse		
32942	Moore, Beth K.	C Child		
32951	Moore, Ralph T.	P Parent		

2. On Participant Entry, complete the following applicable fields and click Approve:

- Effective Date
- Name
- Tax ID Number
- Gender



- Date of Birth
- High School Graduate
- Full Time Student
- Employed (Y/N)
- School Attending
- Disability Flag
- Date of Medicare
- Date of Disability

08901SS Participant Entry

ORACLE JD Edwards World

Enter your change and click Approve.

Effective Date: 06/01/07 More Info HR Needs

Participant Number: Email HR

**General Information:**

Name (Adds Only): Phyllis L. Krieger

Tax ID Number: 949021242

Gender: F

Date of Birth: 04/06/35

**School Information:**

High School Graduate: ☐ Employed (Y/N): ☐

Full Time Student: ☐ School Attending:

**Other Information:**

Disability Flag: ☐ Date of Disability:

Date of Medicare:  Date of Death:

Approve

**3. On Address Changes – Self Service, complete the following fields and click Approve:**

- Mailing Address
- City
- State
- Postal Code
- Phone Number/Type

01ABSS Address Changes - Self Service

Help

ORACLE JD Edwards World URL

Enter your change and click Approve.

Effective Date 08/01/07 Message from HR

Address Number 33419 Email HR

First Name Phyllis

Middle Name L

Last Name Krieger

Mailing Address 4982 S. Leyden Way

C/O Sunnyvale Assisted Living Center

Unit 405

City Denver State CO

Postal Code 80343 Country United States

Phone Number/Type ( 720 ) 982-8473 / HOME

Phone Number/Type ( ) /

Approve

- On Change Participant Information, click Prompt for field values.

08336SS Change Participant Info.

Options Help

ORACLE JD Edwards World URL

Employee Number 15125 Moore, Susan L.

Effective Date 07/01/2007

Highlight Line and Choose Options to Change

Info HR Needs

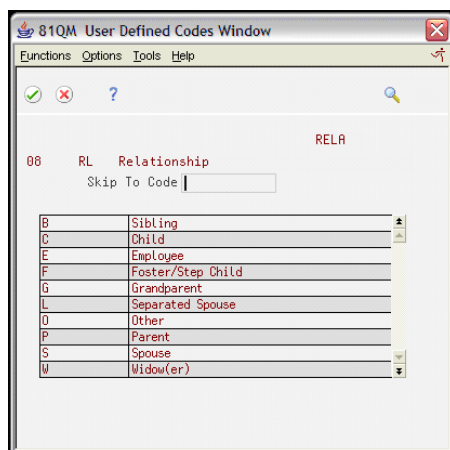
Email HR

Add

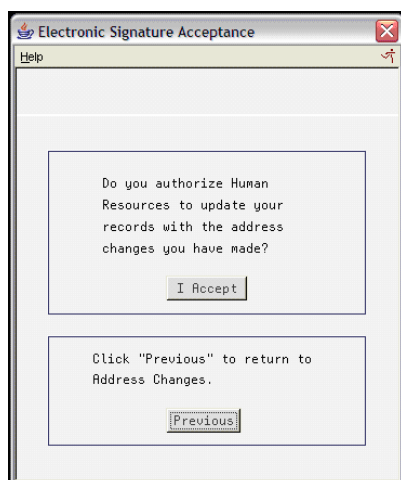
Number	Name	Relationship	Effective From	Effective Thru
32934	Moore, Dan R.	S Spouse		
32942	Moore, Beth K.	C Child		
32951	Moore, Ralph T.	P Parent	12/01/04	07/01/07
00033419	Krieger, Phyllis L.			

Print Email Copy Approve

- On the User Defined Codes window, choose a relationship.



6. On Change Participant Information, click Approve.
7. On Electronic Signature Acceptance, perform one of the following:
  - Click I Accept to accept the addition.
  - Click Previous to return to the Change Participant Information screen and make changes.



## To change participant information

1. On Change Participant Information, choose a participant, and then choose Participant Entry.

08336SS Change Participant Info.

Options Help

ORACLE JD Edwards World URL

Employee Number 15125 Moore, Susan L.  
Effective Date 07/01/2007

Highlight Line and Choose Options to Change

Info HR Needs  
Email HR

Add

Number	Name	Relationship	Effective From	Effective Thru
32934	Moore, Dan R.	S Spouse		
32942	Moore, Beth K.	Child		
32951	Moore, Ralph T.	Parent	12/01/04	07/01/07

Participant Entry  
Delete

Print Email Copy Approve

2. On Participant Entry, complete the appropriate fields and click Approve.

08901SS Participant Entry

Help

ORACLE JD Edwards World URL

Related Employee: 15125 Moore, Susan L.

Effective Date 06/01/07

Participant Number 32942 Moore, Beth K.

Enter your change and click Approve.

More Info HR Needs  
Email HR

General Information:

Name (Adds Only)

Tax ID Number 923495096

Gender F

Date of Birth 12/07/1991

School Information:

High School Graduate N Employed (Y/N) N

Full Time Student N School Attending Thomas Jefferson High School

Other Information:

Disability Flag N Date of Disability

Date of Medicare Date of Death

Approve

3. On Participant Entry, perform one of the following:

- Click Add/Change Address to change address information.
- Click Approve to approve the changes.

08901SS Participant Entry

Help

ORACLE JD Edwards World URL

Related Employee: 15125  
Moore, Susan L.

Enter your change and click Approve.

Effective Date 06/01/2007

Participant Number 32942 Moore, Beth K.

More Info HR Needs

Email HR

General Information:

Name (Addrs Only)

Tax ID Number 923495096

Gender F

Date of Birth 12/07/1991

School Information:

High School Graduate N

Employed (V/N) N

Full Time Student N

School Attending Thomas Jefferson High School

Other Information:

Disability Flag N

Date of Disability

Date of Medicare

Date of Death

Add/Change Address

Approve

4. On Address Changes – Self Service, complete the appropriate fields and click Approve.

01ABSS Address Changes - Self Service

Help

ORACLE JD Edwards World URL

Enter your change and click Approve.

Effective Date 08/01/07

Address Number 33419

Message from HR

First Name Phyllis

Middle Name L

Last Name Krieger

Mailing Address 4982 S. Leyden Way

C/O Sunnyvale Assisted Living Center

Unit 405

City Denver

State CO

Postal Code 80343

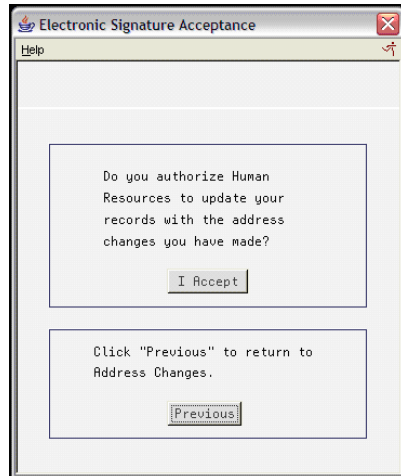
Country United States

Phone Number/Type ( 720 ) 982-8473 / HOME

Phone Number/Type ( ) /

Approve

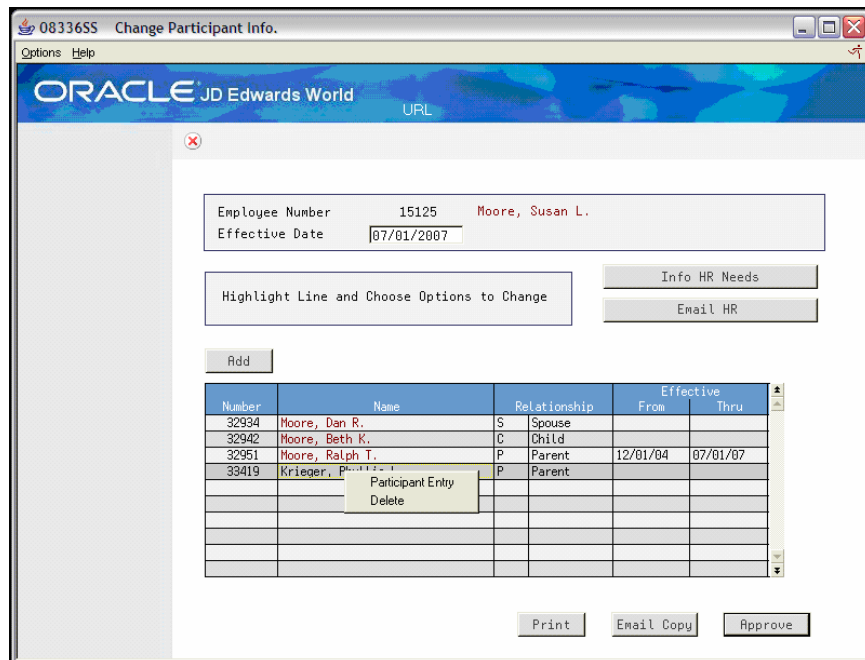
5. On Change Participant Information, click Approve.
6. On Electronic Signature Acceptance, perform one of the following:
- Click I Accept to accept the changes.
  - Click Previous to return to the Change Participant Information screen and make changes.



## To delete a new participant

You can only delete a new participant which you mistakenly add. You can delete the participant anytime prior to management approval and upload. The Change Participant Information program (P08336SS) does not allow you to delete a participant currently in the system.

1. On Change Participant Information, choose a participant, and then choose Delete.



The system replaces the name of the participant with the word Deleted.

08336SS Change Participant Info.

Options Help

ORACLE JD Edwards World URL

Employee Number 15125 Moore, Susan L.  
Effective Date 07/01/2007

Highlight Line and Choose Options to Change

Info HR Needs  
Email HR

Add

Number	Name	Relationship	Effective From	Effective Thru
32934	Moore, Dan R.	S Spouse		
32942	Moore, Beth K.	C Child		
32951	Moore, Ralph T.	P Parent	12/01/04	07/01/07
33419	Deleted	P Parent		

Print Email Copy Approve

- Click Close and then access the program to confirm that the record no longer exists.

The Change Participant Information screen displays only the prior participants.

08336SS Change Participant Info.

Options Help

ORACLE JD Edwards World URL

Employee Number 15125 Moore, Susan L.  
Effective Date

Highlight Line and Choose Options to Change

Info HR Needs  
Email HR

Add

Number	Name	Relationship	Effective From	Effective Thru
32934	Moore, Dan R.	S Spouse		
32942	Moore, Beth K.	C Child		
32951	Moore, Ralph T.	P Parent	12/01/04	07/01/07

Approve





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# Changing Addresses

The employee uses the Change Address program (P01ABSS) to make changes to address information for themselves and participants. The Change Address screen includes two tabs; one for the employee's address information and the other for participants (dependents/beneficiaries). Additionally, the employee can print and send an e-mail with their changes.

When the employee accepts their changes, the system saves the changes and the electronic signature markers to temporary files.

## To change address information

1. On Change Address, complete any of the following fields:

- Effective Date
- Mailing Address
- City
- State
- Postal Code
- Phone Number/Type

The screenshot shows the '01ABSS Change Address' window. At the top is the 'ORACLE JD Edwards World' header with a 'URL' field. Below the header is a tabbed interface with two tabs: 'Change of Address' (selected) and 'Change of Dep/Ben Address'. A message box at the top right says 'Enter your change and click Approve.' The 'Change of Address' tab contains a form with the following fields: 'Effective Date' (calendar icon), 'Address Number' (15422), 'First Name' (Mario), 'Middle Name' (B.), 'Last Name' (Lucenzio), 'Mailing Address' (4201 N. Tennyson), 'City' (Denver), 'State' (CO), 'Postal Code' (80232), 'Country' (United States), and 'Phone Number/Type' (303) 988-2932. There are also buttons for 'Message from HR', 'Email HR', and 'Approve'.

2. Click the Change Dep/Ben Address tab, choose a participant, right-click and choose Change Address.

0833655 Change Participant Info.

Options Help

ORACLE JD Edwards World URL

Employee Number 15422 Lucenzio, Mario B.

Highlight Line and Choose Options to Change

Info HR Needs

Email HR

Number	Name	Relationship	Effective From	Effective Thru
32918	Lucenzio, Kathryn	Spouse		
32926	Lucenzio, Sophia	Child		

3. On Address Changes – Self Service, complete the appropriate fields.

01ABSS Address Changes - Self Service

Help

ORACLE JD Edwards World URL

Enter your change and click Approve.

Change of Dep/Ben Address Change of Address

Effective Date 04/02/07

Address Number 32918

First Name Kathryn

Middle Name C.

Last Name Lucenzio

Mailing Address Same as her husband's

Taking classes 1-4 pm Mon.- Thurs.

Can be reached for emergency purposes

at second phone number below

City

Postal Code

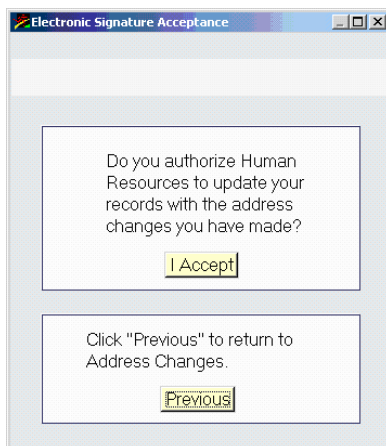
Country United States

Phone Number/Type ( 720 ) 903-8782 / HEMG

Phone Number/Type ( 720 ) 898-5301 /

Approve

4. Click Approve.
5. On Electronic Signature Acceptance, perform one of the following:
  - Click I Accept to accept the changes.
  - Click Previous to return to the Change Address screen and make changes.

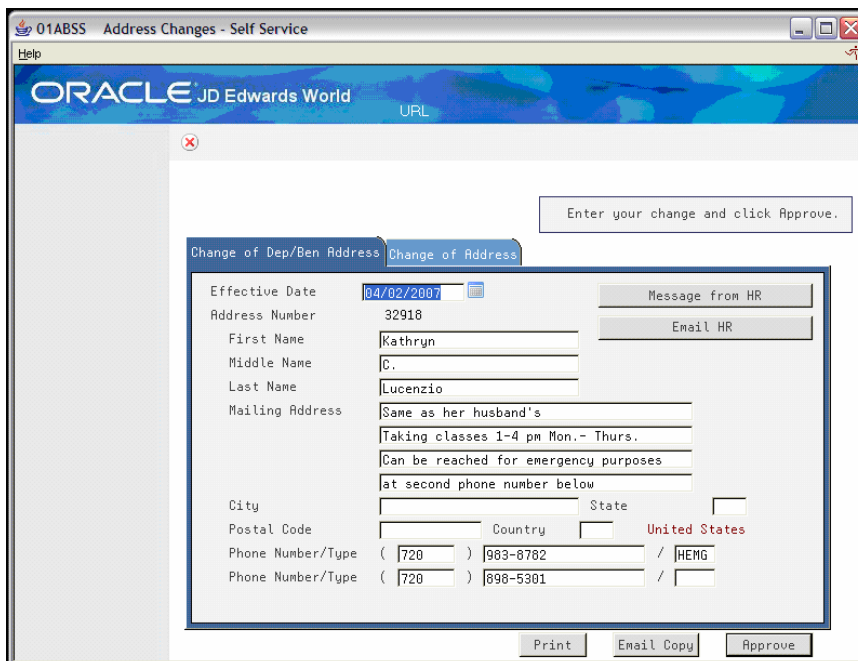


Electronic Signature Acceptance

Do you authorize Human Resources to update your records with the address changes you have made?

Click "Previous" to return to Address Changes.

After accepting the changes, you can print and send an e-mail copy of the changes.



01ABSS Address Changes - Self Service

ORACLE JD Edwards World

URL

Enter your change and click Approve.

Change of Dep/Ben Address Change of Address

Effective Date: 04/02/2007

Address Number: 32918

First Name: Kathryn

Middle Name: C.

Last Name: Lucenzio

Mailing Address: Same as her husband's

Taking classes 1-4 pm Mon.- Thurs.

Can be reached for emergency purposes

at second phone number below

City: State:

Postal Code: Country: United States

Phone Number/Type: ( 720 ) 983-8782 / JHEMG

Phone Number/Type: ( 720 ) 898-5301 /

Message from HR

Email HR

Print Email Copy Approve



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# Changing the Federal W-4

The employee uses the Change Federal W-4 program (P0601SS) to change their Federal W-4 form.

If management sets up documentation using the PC/Web Access Setup program (P08INFO) for the various event buttons and links, the employee can review information, such as deduction worksheets, or access a website by clicking the buttons or links. If these are not set up, the buttons and links do not display.

The first screen of the Change Federal W-4 program includes the Calendar Year field and the status of the W-4. The status can vary depending on how recently the employee has made changes to the W-4. There are four statuses:

- If you have recently implemented Employee Self-Service, there is no W-4 record for the employee and the status is NEW W-4. The employee must complete all of the required fields.
- If the employee has recently made changes to their W-4, and it is awaiting approval, the status is PENDING W-4. The changes the employee makes display in the fields.
- If the information in the W-4 is for the same year as the year in the processing option, the status is CURRENT W-4. The current values display in the fields.
- If the W-4 information is not the year set in the processing option, the status is PRIOR YEAR W4. The employee must complete all of the required fields.

When the employee approves and accepts the W-4 changes, they can send an e-mail and print a report with their completed Federal W-4 form. The printing function and type of information on the report varies.

- If the employee is adding their W-4 information for the same year as the year in the processing option for the first time (NEW W-4) and they do not complete and approve the W-4, they receive an error message for both Print and Email Copy. The error states that there is no record to print. However, this does not display until the employee completes all of the screens for printing and sending e-mail.
- If the employee prints their CURRENT W-4 information from the production file, without making any changes to the W-4, the system does not include the confirmation number.
- If the employee prints the W-4 information, which is awaiting management approval and upload, (NEW W4, PENDING W4 or PRIOR YEAR W4) the system includes confirmation number.

When the employee checks line 4 on the first W-4 screen, this indicates that their current last name differs from the last name on their Social Security card. A message displays on the last W-4 screen informing them that they should contact the Social

Security Administration to procure a new social security card. If you set the phone number processing option, the phone number for the Social Security Administration displays on this screen. Additionally, if an event is set up, the employee can click a button to access the Social Security Administration web site.

There is an asterisk adjacent to each required field. When the employee completes the all of the required fields on a screen, they move between screens by clicking the Next and Previous buttons, which allows them to review the information. If the employee does not complete a required field and clicks Next, the cursor remains in the blank field and an error message displays. The error message displays over the instructions for completing the W-4 form. Most fields include a prompt for valid values where the employee can access additional information and choose a value for the required fields.

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**Note:** When an employee chooses a W-4 Marital Status, they might receive an error message. The employee should disregard the message and click Next.

---

When the employee approves and accepts the changes to the W-4, the system saves the changes and creates a confirmation number in the Federal W-4 Temporary File (T06303).

## To change the federal W-4

1. Choose the Change Federal W-4 event.

The Change Federal W-4 screen displays with the employee's personal information.

You can click Email HR to send an e-mail to the Payroll Department.

2. Optionally, click the Allowances Worksheet button to access a worksheet to determine the W-4 Marital Status.
3. In the W-4 Marital Status field, click Prompt for valid values.

0601SS Change Federal W-4

ORACLE JD Edwards World

URL

Allowances Worksheet

Email HR

Calendar Year: 2007

CURRENT W-4:

Employee Number: 15420

1. Name and Address:

Name - First, Middle Initial, Last Mary B. Perimore

Home Address Line 1 934 S. Logan St.

Address Line 2

City Denver

State CO

Postal Code 80232

2. Social Security Number: 460-01-5420

3. W-4 Marital Status: \* S

NOTE: If married but legally separated, or your spouse is a non-resident alien, select 'Single'.

4. Click on the box if your last name differs from your last name on your social security card. ☐

Next

4. On the User Defined Codes window, choose a marital status and click Enter.

81QM User Defined Codes Window

Functions Options Tools Help

FWMS

07 W4 W-4 Marital Status

Skip To Code

H	Married, withhold at higher Single rate.
M	Married
S	Single

When you choose a W-4 Marital Status, if an error message displays, disregard the message.

5. Optionally, click the checkbox in line 4 to indicate that your last name differs from your last name on your social security card.
6. Click Next.
7. Optionally, click Deductions Worksheets to access a worksheet to determine the number of deductions.

0601SS Change Federal W-4

Help

ORACLE JD Edwards World

URL

Deduction Worksheets

Enter or change all required (\*) or appropriate fields and press ENTER/ 'Next'. To print or email your current W-4 press ENTER or 'Next'.

Calendar Year: 2007  
CURRENT W-4:  
Employee Number: 15420 Mary B. Perinore

5. Total number of allowances you are claiming (from Personal Allowances Worksheet, Line H, or from Deduction and Adjustments and Two-Earner /Two Job Worksheets, if they apply). 3 \*

6. Additional amount, if any, you want to withhold from each paycheck. .00

7. Click on the box next to the items below that apply to you:

☐ Last year, did you have a right to a refund of ALL Federal Income Tax withheld because you had no tax liability?

☐ This year, do you expect a refund of ALL Federal Income Tax withheld because you expect to have NO liability?

☐ If you answered 'Yes' to two questions above, do you want to claim exemption from withholding for 2007 ?

Previous Next

8. In the Total Number of Allowances field, click Prompt for valid values.
9. On Exemptions, review the information, complete the Enter Value field and click Enter.

96CCVC Exemptions - Tax 01

Help

ORACLE JD Edwards World

(XC01 )

The number of payroll tax withholding exemptions claimed on the employee's W-4. If this field is left blank for federal exemptions, zero exemptions will be used. The number of federal exemptions will also be used for state and local tax calculations unless separate entries are created for state and local tax areas.

Special conditions:

o For the state of Arizona, use this field to specify the level of tax (percentage of federal income tax).

o For the state of Connecticut, leave this field blank.

o For the state of Louisiana, enter the number of credits.

More

Enter Value 3 Skip to

10. On Change Federal W-4, in the Additional Amount field, click Prompt for valid values.
11. On Additional Withholding, review the information, optionally complete the Enter Value field and click Enter.



96CCVC Additional Withholding 01

ORACLE JD Edwards World

(AW01)

An additional amount to be withheld over and above the calculated withholding. This could also represent a flat withholding amount in situations where the employee elects to completely bypass the calculated amount. The authority to which each element relates is determined by the tier code of the tax authority. Whether the amount is to be an additional amount or a flat withholding is specified in the employee's master file record.

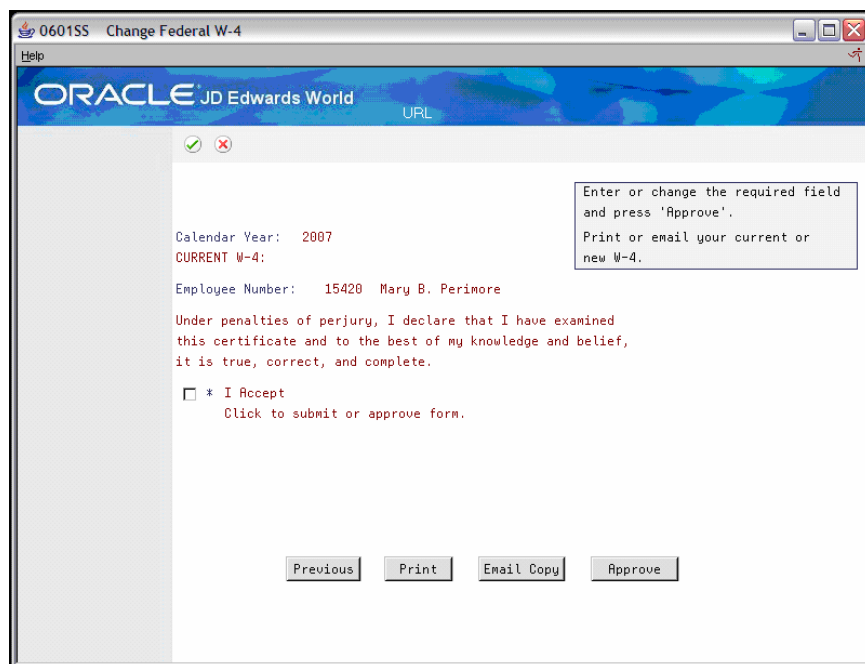

Enter Value 750.00 Skip to

12. On Change Federal W-4, click Next.

The sworn statement for the Federal W-4 Form displays.

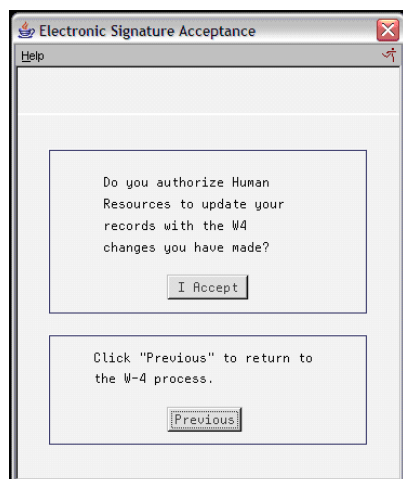
13. Perform one of the following:

- To review W-4 information, click Previous
- To print a copy of the W-4 information, click Print.
- To send an e-mail a copy of the W-4 information, click Email Copy.
- To approve W-4 information, click the I Accept checkbox and then click Approve.



14. On the Electronic Signature Acceptance window, perform one of the following:

- To accept W-4 changes, click I Accept.
- To return to the W-4 screen, click Previous.



When you accept the authorization for HR to update your W-4 with the changes, the W-4 screen displays with a confirmation message.

060155 Change Federal W-4

Help

ORACLE JD Edwards World

URL

Calendar Year: 2007

NEW W-4:

Employee Number: 15424 Lee W. Ming

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

☒ \* I Accept  
Click to submit or approve form.

Your Request has been Submitted.

Because your social security card does not have your current legal name, you must call 1 866 772-1213 to receive a new card.

Soc Security Website

Previous Print Email Copy Approve

If the employee completes the checkbox on line 4, indicating their last name differs from the last name on the social security card, a message displays informing them to contact the Social Security Administration.



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# Viewing Vacation-Sick Balances

View Vacation-Sick program (P06093S) allows the employee to view accrual information for the accrual types in the UDC 07/S5. For example, the employee can view information about their vacation hours, sick hours, or other accrual types that you have set up.

The initial screen that the employees' access is the Vacation Hours screen or the description that you have set up for the accrual type in the UDC 07/S5.

If management sets up documentation using the PC/Web Access Setup program (P08INFO) for an event button, the employee can review information, such as paid holidays for the year. If these are not set up, the button does not display.

Additionally, if you have set up a manager's e-mail address in the Event Setup program (P08EVNT), the employee can send an e-mail to the HR Department.

## To view vacation-sick balances

The Vacation Hours screen displays with the employees vacation balance when the employee chooses this event.

1. Click the Click to View Choices button.

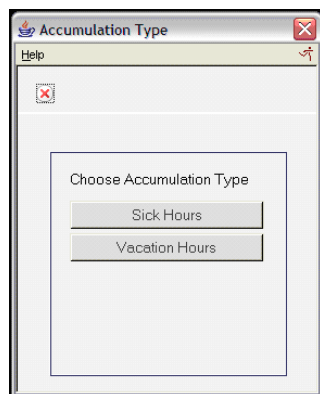
The screenshot shows the '06093S Vacation Hours' window in Oracle JD Edwards World. The window has a title bar with the icon, text '06093S Vacation Hours', and standard window controls. Below the title bar is a blue header with the 'ORACLE JD Edwards World' logo and a 'URL' field. A 'Help' button is in the top left. The main content area has a 'Control' button with a red 'X' icon. On the right, there are two buttons: 'Holidays for 2007' and 'Email HR'. The title 'Vacation Hours' is centered. Below it, a box displays '50503 Justin F. Dreidan'. A table shows the employee's balance details:

	Hours	Days	Dollars
Beginning Balance	32.00	4.00	48.94
Additions This Year			
Taken (Earnings)	.50	.06	24.47
Available Balance	31.50	3.94	24.47
Accrued Balance	20.01	2.50	20.01

At the bottom, there is a 'Click to View Choices' button.

The Accumulation Type window displays with the various types of hours that you can accrue.

2. Choose an Accumulation Type. For example, click Sick Hours.



The Sick Hours screen displays with the sick hours balance.

The screenshot shows the "Sick Hours" screen in JD Edwards World. The window title is "06093S Sick Hours". The header includes the "ORACLE JD Edwards World" logo and a "URL" field. On the right, there are buttons for "Holidays for 2007" and "Email HR". The main content area is titled "Sick Hours" and displays a summary for employee "50503 Justin F. Dreidan".

	Hours	Days	Dollars
Beginning Balance	16.00	2.00	204.00
Additions This Year	17.34	2.17	17.34
Taken (Earnings)	3.50	.44	171.30
Available Balance	29.84	3.73	50.04
Accrued Balance			

At the bottom of the screen, there is a button labeled "Click to View Choices".

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## 4 Approvals





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# Overview to Approvals

There are five management approval programs. On the Employee Resource Management menu (G08ESSM), under the Approval Application section, the programs include:

- Benefit Selection Approval (P08334US)
- Participant Approval (P08DBAP)
- Address Approval (P01ABUSS)
- Federal W-4 Approval (P0601AP)
- Time Entry Approval (P06011AP)

There are separate approval temporary files for the Benefit Selection Approval, Time Entry Approval, and Participant Approval programs. This is to avoid access conflicts for employees using these programs. The system copies all requests to the approval temporary file when management accesses the approval program. When management approves and uploads the records to the production and electronic signature history files, the system deletes the records in the approval temporary files.

When management approves requests, the system saves the approval confirmation in the temporary files for the Time Entry Approval, Address Approval, and Federal W-4 Approval programs. When management uploads the records to the production and electronic signature history files, the system deletes the records in the temporary files.

The system replaces the records in the temporary files for Select Benefits and Change Participant Information with the records in the Benefits Setup File Download program.

There are separate upload programs for the Select Benefits Approval, Enter Time Approval, and Change Participant Information Approval programs. These upload programs create an exception report with the errors in the upload process.



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# Approving Employee Requests

This chapter includes the approval process for additions and changes to addresses, benefit selection, Federal W-4, participants, and time entry.

Although there are some differences between the programs, the data and options display in a similar manner. The similarities between the approval programs include:

- A list of employees requesting changes, one employee per line.
- In the Option field, you can enter the following number next to each employee line to:
  - 1: to display the employee's current data in the production files. For example, the current address information. The exceptions to this include:
    - Federal W-4 Approval. This option is not available.
    - Time Entry Approval. The detail of the employee's current time entry request displays.
  - 2: only in these programs:
    - Participant Approval program to display the address request
    - Benefit Selection Approval program to display dependent/beneficiary enrollment.
  - 4: to approve the request.
  - 8: to reset the request.
- You can use the following function exits:
  - More Details (F4) to display information in the fold area. For example, full address and phone number, list of plans the employee elects, and so forth.
  - Approve All (F5) to approve all employee requests on the screen.
  - Submit Approval (F6) to confirm the upload, the 06SBM confirmation window displays. It allows you to submit all approved employee requests for upload to the production files. The system clears the screen of all employee records that it uploads.
  - Reset Approval Selections (F8) to reset all employee requests on the screen.
- Vocabulary Overrides for each approval program screen contains an approval value that you can change for language or company preferences. Normally, this value is A, for approved. When you approve a record, this value displays on the screen and the system stores it in the appropriate temporary file for the approval program. When you upload records, the system stores this value in the

appropriate electronic signature history files. The specific VTX field per screen follows:


- Address Approval V01ABUSS – VTX024
- Benefit Selection Approval V08334US – VTX104
- Federal W-4 Approval V0601AP – VTX016
- Participant Approval V08DBAP – VTX036
- Time Entry Approval V0611AP – VTX093

## Approving Address Changes

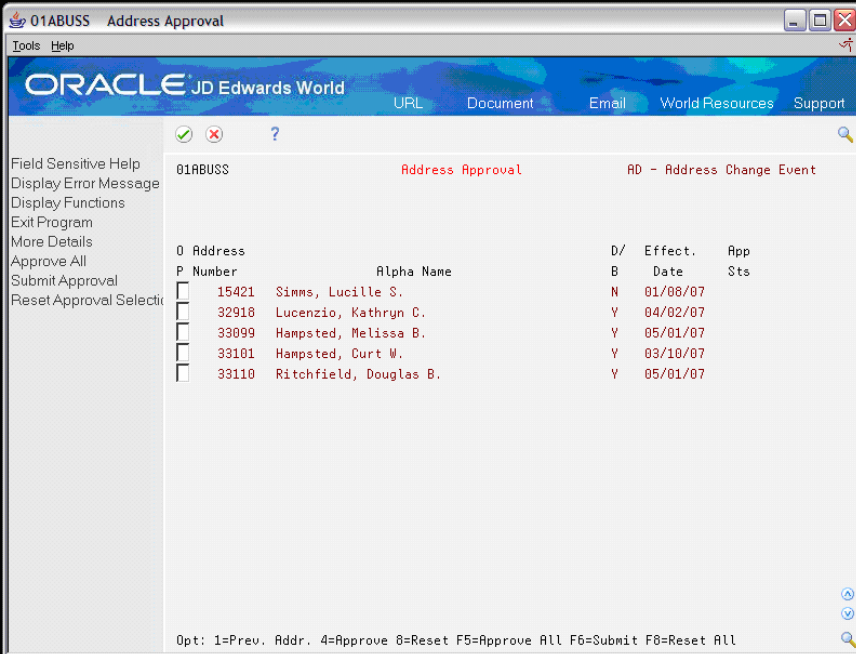
You use the Address Approval program (P01ABUSS) to approve address changes for employees and participants. When you approve the change, an approval marker displays in the App Sts field next to the employee record.

You can approve all employee records at once and then upload them at a later time. This allows the HR Manager to choose when the upload occurs.

### To approve address changes

	From Employee Resource Management (G08ESSM), choose <b>Address Approval</b>
---	---

On Address Approval, approve the records.



P Number	Alpha Name	D/B	Effect. Date	App Sts
<input type="checkbox"/> 15421	Simms, Lucille S.	N	01/08/07	
<input type="checkbox"/> 32918	Lucenzio, Kathryn C.	Y	04/02/07	
<input type="checkbox"/> 33099	Hampsted, Melissa B.	Y	05/01/07	
<input type="checkbox"/> 33101	Hampsted, Curt W.	Y	03/10/07	
<input type="checkbox"/> 33110	Ritchfield, Douglas B.	Y	05/01/07	

Opt: 1=Prev. Addr. 4=Approve 8=Reset F5=Approve All F6=Submit F8=Reset All

01ABUSS Address Approval

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
More Details  
Approve All  
Submit Approval  
Reset Approval Selection

01ABUSS Address Approval AD - Address Change Event

Address	Alpha Name	D/ Effect. Date	App Sts
15421 Simms, Lucille S.		N 01/08/07	
2887 E. 4th Avenue	( 303 )	989-2983	/ HOME
Denver, CO 80343			/
32918 Lucenzio, Kathryn C.		Y 04/02/07	
Dep/Ben of Employee Number 15422 Lucenzio, Mario B.			
Same as her husband's	( 720 )	983-8782	/ HENG
Taking classes 1-4 pm Mon.- Thurs.	( 720 )	898-5301	/
Can be reached for emergency purposes at second phone number below			

Opt: 1=Prev. Addr. 4=Approve 8=Reset F5=Approve All F6=Submit F8=Reset All

## Approving Benefit Selection

You use the Benefit Selection Approval program (P08334US) to approve employee benefit selections.

When you approve the benefits, an approval marker displays in the App Sts field next to the employee record. When you choose More Details (F4) the system displays a record for each plan that the employee stops, those with an end-date, each new plan and changes in a plan. If D or B displays adjacent to the App Sts field on a plan line, dependents or beneficiaries are enrolled in this plan.

When you approve and upload records, the system creates the Benefit Batch Update Exception Report (R08334BS) with the records that did not upload and those records that you did not approve before upload.

You can approve all employee records at once and then upload them at a later time. This allows the HR Manager to upload at a time when employees are not accessing the temporary files.

### To approve benefit selection



From Employee Resource Management (G08ESSM), choose **Benefit Selection Approval**

On Benefit Selection Approval, approve the records.

08334US Benefit Selection Approval

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

08334US Benefit Selection Approval

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
More Details  
Approve All  
Submit Approval  
Reset Approval Select  
Exit Dep/Ben Elections

P	Emp. No.	Employee Name	Benefit Group	Group Rule	Pay Freq	Reason	App Sts
<input type="checkbox"/>	15126	Cane, Phillip R.	HRLY		W	OE	
<input type="checkbox"/>	15422	Lucenzio, Mario B.	HRLY		W	RT	
<input type="checkbox"/>	15424	Ming, Lee W.	HRLY		W	LC	

Opt: 1=Prev Ben 2=D/B 4=Approv 8=Reset F5=Approv All F6=Submit F8=Reset All

08334US Benefit Selection Approval

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

08334US Benefit Selection Approval

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
More Details  
Approve All  
Submit Approval  
Reset Approval Select  
Exit Dep/Ben Elections

P	Emp. No.	Employee Name	Benefit Group	Group Rule	Pay Freq	Reason	App Sts
<input type="checkbox"/>	15126	Cane, Phillip R.	HRLY		W	OE	
	Plan: DEN	Opt: Eff: 01/01/05	EE:		ER:		DB:
	Plan: MED	Opt: Eff: 01/01/05	EE:		ER:		DB:
	Plan: VISIONE1	Opt: Eff: 12/01/06	EE:	3.05-	ER:		DB:
	Plan: DEN+FAM	Opt: FAM Eff: 01/01/08	EE:	13.00	ER:		DB: D
	Plan: LIFE	Opt: Eff: 01/01/08	EE:	5.98-	ER:		DB: B
	Plan: MED	Opt: Eff: 01/01/08	EE:	9.75-	ER:		DB:
	Plan: SPND-MED	Opt: Eff: 01/01/08	EE:	85.00	ER:		DB:
	Plan: VISIONE1	Opt: Eff: 01/01/08	EE:	3.05-	ER:		DB:
	Plan:	Opt: Eff:	EE:		ER:		DB:
	Plan:	Opt: Eff:	EE:		ER:		DB:
	Plan:	Opt: Eff:	EE:		ER:		DB:
	Plan:	Opt: Eff:	EE:		ER:		DB:
	Plan:	Opt: Eff:	EE:		ER:		DB:
	Plan:	Opt: Eff:	EE:		ER:		DB:
	Plan:	Opt: Eff:	EE:		ER:		DB:
	Plan:	Opt: Eff:	EE:		ER:		DB:
	Plan:	Opt: Eff:	EE:		ER:		DB:

Opt: 1=Prev Ben 2=D/B 4=Approv 8=Reset F5=Approv All F6=Submit F8=Reset All

08334US Benefit Selection Approval

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help 08334US Benefit Selection Approval  
 Display Error Message Open Enrollment Dep/Ben Elections  
 Display Functions  
 Exit Program  
 More Details  
 Approve All  
 Submit Approval  
 Reset Approval Selection  
 Exit Dep/Ben Elections

Employee No 15126 Cane, Phillip R.  
 Effective Date 01/01/2008

Dependent / Beneficiary			Dep/	Bene			Perc.	
Number	Name	Relationship	Bene	Plan ID	Opt	Type	Allo	
32969	Cane, Melissa B.	S Spouse	D	DEN+FAM	FAM			
32977	Cane, Isabelle S.	C Child	D	DEN+FAM	FAM			
32969	Cane, Melissa B.	S Spouse	B	LIFE		C1	75.00	
32977	Cane, Isabelle S.	C Child	B	LIFE		C2	25.00	

## Approving Federal W-4 Changes

You use the Federal W-4 Approval program (P0601AP) to approve Federal W-4 records. The system displays only the changes employees' request. Each field value of the W-4 form displays when you choose More Details (F4). When you approve the changes, an approval marker displays in the App Sts field next to the employee record.

You can approve all employee records at once and then upload them at a later time. This allows the HR Manager to choose when the upload occurs.

The system updates the Federal W-4 Master File (F06303) with the employees request for changes when you approve and upload the records. You can also update the Employee Tax Exemptions/Overrides file (F06017) by setting the Files to be Updated processing option to 1.

### To approve Federal W-4 changes



From Employee Resource Management (G08ESSM), choose **Federal W-4 Approval**

On Federal W-4 Approval, approve the records.

0601AP Federal W-4 Approval

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
More Details  
Approve All  
Submit Approval  
Reset Approval Selection

0601AP Federal W-4 Approval

P	Address	Employee Name	W-4 Marital Status	Year	Request Date	App Sts
<input type="checkbox"/>	15125	Moore, Susan L.	M Married	2007	03/07/07	
<input type="checkbox"/>	15422	Lucenzio, Mario B.	M Married	2007	02/28/07	
<input type="checkbox"/>	15423	Vandercleet, John W.	M Married	2007	03/05/07	
<input type="checkbox"/>	15424	Ming, Lee W.	M Married	2007	03/07/07	
<input type="checkbox"/>	50501	Hampsted, Larry F.	S Single	2007	03/09/07	
<input type="checkbox"/>	50502	Simms, Robert W.	S Single	2007	03/09/07	

Opt: 4=Approve 8=Reset F5=Approve All F6=Submit F8=Reset All

0601AP Federal W-4 Approval

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
More Details  
Approve All  
Submit Approval  
Reset Approval Selection

0601AP Federal W-4 Approval

P	Address	Employee Name	W-4 Marital Status	Year	Request Date	App Sts
<input type="checkbox"/>	15125	Moore, Susan L.	M Married	2007	03/07/07	X
Number of Allowances: 4 Additional Withholding: \$ .00 Name Chg: Exempt Status: Confirmed: X Request Time: 17:19:48						
<input type="checkbox"/>	15422	Lucenzio, Mario B.	M Married	2007	02/28/07	X
Number of Allowances: 2 Additional Withholding: \$ .00 Name Chg: X Exempt Status: Confirmed: X Request Time: 9:28:57						
<input type="checkbox"/>	15423	Vandercleet, John W.	M Married	2007	03/05/07	X
Number of Allowances: 3 Additional Withholding: \$ 750.00 Name Chg: X Exempt Status: Confirmed: X Request Time: 13:43:06						
<input type="checkbox"/>	15424	Ming, Lee W.	M Married	2007	03/07/07	X
Number of Allowances: 3 Additional Withholding: \$ 750.00 Name Chg: X Exempt Status: Confirmed: X Request Time: 16:56:46						
<input type="checkbox"/>	50501	Hampsted, Larry F.	S Single	2007	03/09/07	X
Number of Allowances: 0 Additional Withholding: \$ 5.00 Name Chg: Exempt Status: Confirmed: X Request Time: 12:10:08						

Opt: 4=Approve 8=Reset F5=Approve All F6=Submit F8=Reset All

## Approving Participants

You use the Participant Approval program (P08DBAP) to approve additional participants and changes for existing participants.

Only the changes for participants display when you choose More Details (F4). When you approve the changes, an approval marker displays in the App field next to the employee record.



When you approve and upload records, the system creates the Participant Approval Upload Report - ERM (R08DBAP) with the records that did not upload and the reason.

You can approve all employee records at once and then upload them at a later time. This allows the HR Manager to upload at a time when employees are not accessing the temporary files.

## To approve participant changes



From Employee Resource Management (G08ESSM), choose **Participant Approval**

On Participant Approval, approve the records.

08DBAP Participant Approval

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

08DBAP Participant Approval DB - Participant Event

Employee	Employee Name	Part. Number	Participant Name	Effect. Date	App
<input type="checkbox"/> 15125	Moore, Susan L.	32942	Moore, Beth K.	06/01/07	
<input type="checkbox"/> 15125	Moore, Susan L.	32951	Moore, Ralph T.	07/01/07	
<input type="checkbox"/> 15420	Perimore, Mary B.	32871	Brettstone, Wilma B.	05/15/07	

Opt: 1=Prev.D/B 2=Addr. 4=Appr. 8=Reset F5=App.All F6=Submit F8=Reset All

**O8DBAP Participant Approval DB - Participant Event**

Employee Number	Employee Name	Part. Number	Participant Name	Effect. Date	App
15125	Moore, Susan L.	32942	Moore, Beth K.	06/01/07	
Tax ID: 923495096 Gender: F Effective: to Rel: C DB: B HS Grad: N FT Student: N School Attending: Thomas Jefferson High School Employed: N Disability: N Disabil. Date: Birth Date: 12/07/1991 Date of Medicare: Date of Death: Address Change: N					
15125	Moore, Susan L.	32951	Moore, Ralph T.	07/01/07	
Tax ID: 939888138 Gender: M Effective: 12/01/2004 to 07/01/2007 Rel: P DB: B HS Grad: Y FT Student: N School Attending: Denver Art Academy Employed: N Disability: N Disabil. Date: Birth Date: 10/11/1992 Date of Medicare: Date of Death: Address Change: N					
15420	Perimore, Mary B.	32871	Brettstone, Wilma B.	05/15/07	
Tax ID: 938891244 Gender: M Effective: to Rel: P DB: B HS Grad: Y FT Student: N School Attending: Art Students League Employed: N Disability: N Disabil. Date: Birth Date: 04/06/1931 Date of Medicare: Date of Death: Address Change: Y					

Opt: 1=Prev.D/B 2=Addr. 4=Appr. 8=Reset F5=App.All F6=Submit F8=Reset All

**O8DBAP Address Changes - Self Service**

Action Code I  
Address Number 32871  
Effective Date

First Name Wilma  
Middle Name B.  
Last Name Brettstone  
Mailing Address 3492 S. Niagara Street  
Unit 402

City Denver  
Postal Code 80339  
Country United States  
Phone Number/Type ( 303 ) 988-2893 HOME  
Phone Number/Type ( 720 ) 292-4816 HENG

Email HR  
Search Type Q

## Approving Time Entry

You use the Time Entry Approval program (P0611AP) to approve time entry for employees.

You can choose to locate only those time entry records for a particular business unit or a specific supervisor. Additionally, you can choose to use both a specific business unit and a specific supervisor. You can also click Enter and all time records display. You can set up business unit security for the By Business Unit field.

When you approve and upload records to production, the system creates a duplicate of the record, including the electronic signature markers, in the history file. The Time Entry Approval program also adds the AS400 User ID and a time/date stamp for the approval to the approval temporary file. When you approve the records, an approval marker displays in the A P field next to the employee record and the approver User ID in the Approver Sign-On field. The system also stores the data in these fields in the electronic signature history files.

The system deletes time entry records from the temporary file after you upload records to production and the electronic signature history file.

The Time Entry Batch Upload - Self Service (P0611APB) program uploads time records. If the system identifies errors, it generates the Exception Report for Time Entry Upload – ERM report (R0611APB).

## To approve time entry



From Employee Resource Management (G08ESSM), choose **Time Entry Approval**

On Time Entry Approval, approve the records.

**0611AP By B**

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
More Details  
Approve All  
Submit Approval  
Reset Approval Selection

0611AP Time Entry Approval

By Bus Unit  
By Supervisor

P	Emp. No.	Employee Name	Total Hours	Total Amount	Total Pieces	Ev	Approver Sign-On	A P
<input type="checkbox"/>	15126	Cane, Phillip R.	86.00			TE		
<input type="checkbox"/>	15421	Simms, Lucille S.	46.00			TE		
<input type="checkbox"/>	15422	Lucenzio, Mario B.	40.00			TE		
<input type="checkbox"/>	15423	Vandercleet, John W.	44.00			TS		
<input type="checkbox"/>	15424	Ming, Lee W.	40.00			TE		
<input type="checkbox"/>	50501	Hampsted, Larry F.	30.00			TE		

Opt: 1=Empl Time 4=Approve 8=Reset F5=Approv All F6=Submit F8=Reset All

0611AP Time Entry Approval

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

0611AP Time Entry Approval

By Bus Unit

By Supervisor

0

P Emp. No. Employee Name Total Hours Total Amount Total Pieces Ev Approver A

☐ 15126 Cane, Phillip R. 86.00 TE Sign-On P

Typ:	1 Hr:	40.00	Ant:	Pc:	Eq:	Dw:	04/05/07
Typ:	100 Hr:	6.00	Ant:	Pc:	Eq:	Dw:	04/06/07
Typ:	801 Hr:	40.00	Ant:	Pc:	Eq:	Dw:	04/15/07
Typ:	Hr:	Ant:	Pc:	Eq:	Dw:		
Typ:	Hr:	Ant:	Pc:	Eq:	Dw:		
Typ:	Hr:	Ant:	Pc:	Eq:	Dw:		
Typ:	Hr:	Ant:	Pc:	Eq:	Dw:		
Typ:	Hr:	Ant:	Pc:	Eq:	Dw:		
Typ:	Hr:	Ant:	Pc:	Eq:	Dw:		
Typ:	Hr:	Ant:	Pc:	Eq:	Dw:		
Typ:	Hr:	Ant:	Pc:	Eq:	Dw:		
Typ:	Hr:	Ant:	Pc:	Eq:	Dw:		
Typ:	Hr:	Ant:	Pc:	Eq:	Dw:		
Typ:	Hr:	Ant:	Pc:	Eq:	Dw:		
Typ:	Hr:	Ant:	Pc:	Eq:	Dw:		
Typ:	Hr:	Ant:	Pc:	Eq:	Dw:		

Opt: 1=Enpl Time 4=Approve 8=Reset F5=Approv All F6=Submit F8=Reset All

0611AP Time Entry By Employee

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Time Entry

Batch No 10732

Action Code I LS Amount

Employee Number 15126 Cane, Phillip R. Hours 86.00

Date Worked

Access Type Button Title Email Payroll

PC/Web Name/Path

Manager Email

Type of Time	Hours	LS Amount	Date Worked	Comment
1	40.00		04/05/07	Regular responsibilities
100	6.00		04/06/07	Special client needs
801	40.00		04/15/07	Out of town - family

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## **5   Inquiries and Reports**



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# Overview to Reports and Inquiries

This section includes the inquiries and reports on the Employee Resource Management Menu (G08ESSM) that you use to review employee records.

## Production Applications

You use the Federal W-4 Inquiry/Maintenance program (P06303) to view any W-4 information in the Federal W-4 Master File (F06303) which employees or management enters.

## Electronic Signature Inquiry

Use these programs to select records by a specific event or employee. The system displays the history of approval records in the production files for the choices employees make.

## Electronic Signature Reports

Use these programs to access World Writer report versions. These reports allow you to select records by a specific event or employee. You can print reports of the history of approval records in the production files for the choices employees make. The electronic signature components which are specific to an employee, the event, and time of their choices print on each report.

## About Electronic Signature Files

You can view the values in the Electronic Signature Inquiry programs or the Electronic Signature Reports.

When the employee accepts the agreement for the changes they request, the system saves the values they change or enter as well as the time, date and other unique markers in the temporary files. When you approve and upload employee requests the system validates the information and copies all of the values and the respective markers to the electronic signature history files.

Each temporary file contains the same fields as those in their respective production file; however, they also contain additional fields that are not in the production file. These additional fields are the markers for the electronic signature. They include the fields in the following table:

Field Description	Field Name	Type	Length	Explanation
Event Effective Date	EFTS	S	6	Either the effective date you assign or one the employee enters.
Time of Day (confirmed by employee)	TMDY	P	6	
Updated Date (confirmed by employee)	UPDJ	P	6	
Electronic Signature – Unique Marker	ESIG	A	22	A combination of event (2), employee number (8), date employee confirms their choice (6 in YYMMDD format), and time employee confirms their choice (6 in HHMMSS format).
Event	HRST	A	2	Abbreviation for the events. For example, OE, LC, AD.
Status	STMS	A	1	Signifies type of change. For example, A for add.
Approval	APP	A	1	The default value (A) or the value you set up for the approval marker.

The fields in the following table indicate when you change or update information; however, they might not be in every production file. The Date Uploaded to Production field (UPMJ) is in every file and it signifies the date you upload the employee's choice to production. The Program ID and User ID indicate the ERM program and individual uploading the data.

Field Description	Field	Type	Length
Program ID	PID	A	10



Field Description	Field	Type	Length
User ID	USER	A	10
Date Uploaded to Production	UPMJ	S	6
Time Uploaded to Production (only in files where this exists in production files)	UPMT	S	6
Job Number (only in files where this exists in production files)	JOBN	A	10

The employee can print or store an electronic copy of the choices they request. If they believe there is a discrepancy between the choices they make and the actual employee record, they can use their copy of their choices for comparison with the information kept by the HR/PR Department. See *Appendix A - Employee Report Examples* for examples of employee reports.

There are two ways to access the electronic signature history files. You can access electronic signature history inquiry programs or print World Writer version reports which allows you to view more field values. The electronic signature field values print in the first line of each record of the World Writer reports. These include the date the employee confirms their choices and the date you upload the choices to production.

You use search criteria in both the inquiry programs and the World Writer reports to locate information in the electronic signature history files. One search criteria is by event, event effective date, and employee number. This allows you to quickly access all records for a specific event or specific event and effective date. The other search criterion is by employee number, event, and event effective date. This allows you to quickly access all of the events or event changes an employee requests or to access a specific event and event effective date for that employee.



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# Working with Self-Service Inquiries

The inquiry applications functions similarly and there are minor differences between those that access one event and those that access multiple events. These inquiries include only one event:

- Federal W-4 Event Inquiry
- Address Event Inquiry
- Participant Event Inquiry

These inquiries access multiple events:

- Time Entry Event Inquiry (TB, TE, TM, TS, and TW)
- Benefits Event Inquiry (LC, NH, OE, OT, and RT)

All of the initial inquiry screens contain the same two fields and you must complete one of them. These fields are Vocabulary Overrides that you can set. When you choose Event, you search by event, event effective date, and employee number. When you choose Employee, you search by employee, event, and event effective date. The Federal W-4 Inquiry uses year instead of effective date.

On the second inquiry screen, you can enter an effective date (year) or enter a value in both the Effective Date and Employee number fields. The system does not accept the inquiry if you enter a value in only the Employee number field.

For those inquiries that access multiple events, you can perform the following:

- You do not choose an event and the system displays all event records. The system, displays the records by event, effective date, and employee.
- You choose only an Event, choose Event and complete the Event Effective Date fields or complete all three fields.
- You choose an Event and complete the Employee number fields or complete the Effective Date and Employee number fields and the system does not accept the inquiry.

For those inquiries that access one event, the system enters the event value and you cannot change the value. For those inquiries that access multiple events, you can click the Prompt for valid values icon (F1) to access a list of events; however, the system accepts only the events that are valid for that program. You must enter a value in the Employee number field and you can enter a value in the Event Effective Date (Year) field to narrow the search results.


The fold area on each screen displays the change request details similar to the display in the approval programs.

The VTX field for each inquiry is as follows:

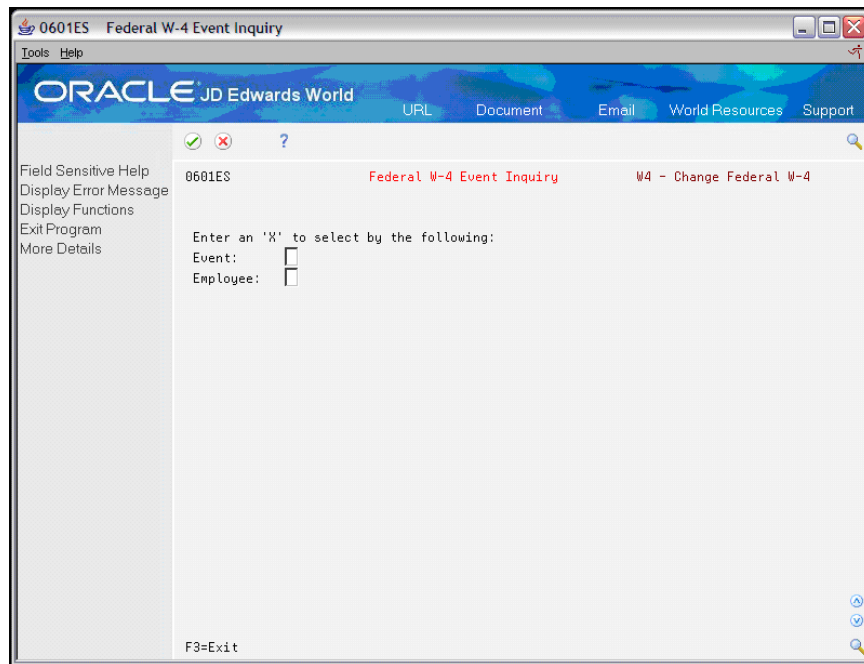
- Federal W-4 Event Inquiry V0601ES – VTX022

- Address Event Inquiry V01ABES – VTX030
- Benefits Event Inquiry V08334ES – VTX109
- Dependent/Beneficiary Event Inquiry V08DBES – VTX045
- Time Entry Event Inquiry V0611ES – VTX094

## To inquire on an event

	From Employee Resource Management (G08ESSM), choose an <b>Approval program</b>
---	--

1. On the event inquiry screen, complete one of the following fields:
  - Event
  - Employee



2. On the next inquiry screen, perform one of the following:
  - Click Enter to view all records.
  - To refine your search, enter a date in the Year (Effective Date) or Employee number fields.

0601ES Federal W-4 Event Inquiry W4 - Change Federal W-4

Enter an 'X' to select by the following:

Event: X

Employee:

Please enter the following:

Event: W4

Year:

Employee:

F3=Exit

The system displays all records.

Address Number	Employee Name	W-4 Marital Status	Year	Request Date	App Sts
15125	Moore, Susan L.	M Married	2006	12/21/06	A
15126	Cane, Phillip R.	H Married, withhold at high	2006	12/21/06	A
15420	Perimore, Mary B.	H Married, withhold at high	2006	01/08/07	A
15420	Perimore, Mary B.	S Single	2007	02/22/07	A
15421	Simms, Lucille S.	S Single	2007	02/22/07	A
43004	Bradburn, Kerry E.	M Married	2007	02/20/07	A
50503	Dreidan, Justin F.	H Married, withhold at high	2007	03/02/07	A
50503	Dreidan, Justin F.	H Married, withhold at high	2007	02/21/07	A
50503	Dreidan, Justin F.	H Married, withhold at high	2007	02/16/07	A
50504	Ritchfield, Joan B.	S Single	2007	03/02/07	A
50504	Ritchfield, Joan B.	S Single	2007	02/21/07	A
50506	Wenz, Paul A.	S Single	2007	03/02/07	A
50506	Wenz, Paul A.	S Single	2007	02/21/07	A
50506	Wenz, Paul A.	S Single	2007	02/21/07	A
50506	Wenz, Paul A.	H Married, withhold at high	2007	02/16/07	A

F3=Exit

You can choose More Details (F4) to view detailed information.

Address Number	Employee Name	W-4 Marital Status	Year	Date	Request	App Sts
15125	Moore, Susan L.	M Married	2006	12/21/06		A
Number of Allowances: 5 Additional Withholding: \$ 3,500.00						
Name Chg: Exempt Status: Confirmed: X Request Time: 19:25:20						
15126	Cane, Phillip R.	H Married, withhold at high	2006	12/21/06		A
Number of Allowances: 4 Additional Withholding: \$ 250.00						
Name Chg: Exempt Status: Confirmed: X Request Time: 19:26:00						
15420	Perimore, Mary B.	H Married, withhold at high	2006	01/08/07		A
Number of Allowances: 0 Additional Withholding: \$ .00						
Name Chg: Exempt Status: Confirmed: X Request Time: 17:14:19						
15420	Perimore, Mary B.	S Single	2007	02/22/07		A
Number of Allowances: 3 Additional Withholding: \$ .00						
Name Chg: Exempt Status: Confirmed: X Request Time: 10:53:51						
15421	Simms, Lucille S.	S Single	2007	02/22/07		A
Number of Allowances: 2 Additional Withholding: \$ .00						
Name Chg: X Exempt Status: Confirmed: X Request Time: 15:22:14						

The system displays only those records you request.

Address Number	Employee Name	W-4 Marital Status	Year	Date	Request	App Sts
15420	Perimore, Mary B.	H Married, withhold at high	2006	01/08/07		A
15420	Perimore, Mary B.	S Single	2007	02/22/07		A

## Working with Federal W-4

The Federal W-4 Inquiry/Maintenance program (P06303) allows you to view W-4 information in the Federal W-4 Master file (F06303). You can narrow the search results by year, employee, or both. Additionally, you can add and change W-4 records.

You can print any W-4 record which the employee enters and it includes the electronic signature information from the history file. You can print an employee record management enters or changes using this program, however the record from the history file does not include the electronic signature values. If the Printed Report processing option is set to 1, (to print questions 8 - 10 for the report) this information prints on the report you submit to the IRS.

If the Operation Available to User processing option is set to 1, (allowing you to change or add W-4 records) the program opens with the detail area open displaying all data.

---

**Note:** If the Operation Available to User processing option is blank, the program displays one employee record per line. If you set this processing option to 1, the program displays error message 0961 – Invalid Selection Code

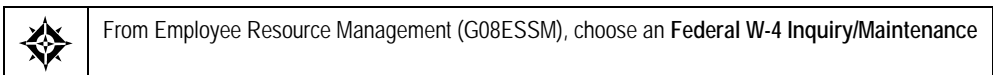
---

You can change multiple records on multiple pages. When you make the changes to the first record and click Enter, the system saves and displays the values, which you cannot change. The next record displays for you to make changes.

You can add a record for an employee. You use any existing employee record, instead of paging to the bottom. You enter the data in the appropriate fields and the system adds the record for the employee. When you click Enter, the system saves and displays the values, which you cannot change. The original employee data remains in the system. When you click Enter again the system reorders the record on the screen.

When you add or change employee records using this program, the system adds a record in the Federal W-4 Master File (F06303). The system also adds a record to the Federal W-4 History File (F06303H); however, there are no values for the electronic signature marker fields.

## To view Federal W-4 information



1. On Federal W-4 Maintenance, complete any of the following fields:
  - By Year
  - By Employee

06303 Federal W-4 Maintenance

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Display Error Message  
Display Functions  
Exit Program  
More Details

06303 Federal W-4 Maintenance

By Year:   
By Employee:

P	Number	Employee Name	W-4 Marital Status	Year	Date
<input type="checkbox"/>	15125	Moore, Susan L.	M Married	2006	12/21/06
	Number of Allowances: 5		Additional Withholding: \$		3,500.00
	Name Chg:		Exempt Status:	Confirmed: X	Request Time: 19:25:20
<input type="checkbox"/>	15126	Cane, Phillip R.	H Married, withhold at high	2006	12/21/06
	Number of Allowances: 4		Additional Withholding: \$		250.00
	Name Chg:		Exempt Status:	Confirmed: X	Request Time: 19:26:00
<input type="checkbox"/>	15420	Perimore, Mary B.	H Married, withhold at high	2006	01/08/07
	Number of Allowances: 0		Additional Withholding: \$		.00
	Name Chg:		Exempt Status:	Confirmed: X	Request Time: 17:14:19
<input type="checkbox"/>	15420	Perimore, Mary B.	S Single	2007	02/22/07
	Number of Allowances: 3		Additional Withholding: \$		.00
	Name Chg:		Exempt Status:	Confirmed: X	Request Time: 10:53:51
<input type="checkbox"/>	15421	Simms, Lucille S.	S Single	2007	02/22/07
	Number of Allowances: 2		Additional Withholding: \$		.00
	Name Chg: X		Exempt Status:	Confirmed: X	Request Time: 15:22:14

Opt: 1=Print 2=Change 3=Add F3=Exit

- On Federal W-4 Inquiry, enter 2 in the Option field to change any employee record.

06303 By Y

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Display Functions  
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More Details

06303 Federal W-4 Inquiry

By Year:   
By Employee:

P	Number	Employee Name	W-4 Marital Status	Year	Date
<input type="checkbox"/>	15125	Moore, Susan L.	M Married	2006	12/21/06
<input type="checkbox"/>	15126	Cane, Phillip R.	H Married, withhold at high	2006	12/21/06
<input type="checkbox"/>	15420	Perimore, Mary B.	H Married, withhold at high	2006	01/08/07
<input type="checkbox"/>	15420	Perimore, Mary B.	S Single	2007	02/22/07
<input type="checkbox"/>	15421	Simms, Lucille S.	S Single	2007	02/22/07
<input checked="" type="checkbox"/>	43004	Bradburn, Kerry E.	M Married	2007	02/20/07
<input type="checkbox"/>	50503	Dreidan, Justin F.	H Married, withhold at high	2007	03/02/07
<input type="checkbox"/>	50503	Dreidan, Justin F.	H Married, withhold at high	2007	02/21/07
<input type="checkbox"/>	50503	Dreidan, Justin F.	H Married, withhold at high	2007	02/16/07
<input type="checkbox"/>	50504	Ritchfield, Joan B.	S Single	2007	03/02/07
<input type="checkbox"/>	50504	Ritchfield, Joan B.	S Single	2007	02/21/07
<input type="checkbox"/>	50506	Wenz, Paul A.	S Single	2007	03/02/07
<input type="checkbox"/>	50506	Wenz, Paul A.	S Single	2007	02/21/07
<input type="checkbox"/>	50506	Wenz, Paul A.	S Single	2007	02/21/07
<input type="checkbox"/>	50506	Wenz, Paul A.	H Married, withhold at high	2007	02/16/07

Opt: 1=Print F3=Exit

The appropriate fields become input-capable. All required fields display an asterisk. If you do not enter a value or an invalid value the system displays an error.

- On Federal W-4 Inquiry, enter 3 in the Option field to add an employee record.



06303 By Y

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Display Functions  
Exit Program  
More Details

06303 Federal W-4 Maintenance

By Year:   
By Employee:

P	Number	Employee Name	W-4 Marital Status	Year	Date	Request
<input checked="" type="checkbox"/>	15125	Moore, Susan L.	M Married	2006	12/21/06	
	Number of Allowances: 5		Additional Withholding: \$		3,500.00	
	Name Chg:		Exempt Status:	Confirmed: X	Request Time: 19:25:20	
<input type="checkbox"/>	15126	Cane, Phillip R.	H Married, withhold at high	2006	12/21/06	
	Number of Allowances: 4		Additional Withholding: \$		250.00	
	Name Chg:		Exempt Status:	Confirmed: X	Request Time: 19:26:00	
<input type="checkbox"/>	15420	Perimore, Mary B.	H Married, withhold at high	2006	01/08/07	
	Number of Allowances: 0		Additional Withholding: \$		.00	
	Name Chg:		Exempt Status:	Confirmed: X	Request Time: 17:14:19	
<input type="checkbox"/>	15420	Perimore, Mary B.	S Single	2007	02/22/07	
	Number of Allowances: 3		Additional Withholding: \$		.00	
	Name Chg:		Exempt Status:	Confirmed: X	Request Time: 10:53:51	
<input type="checkbox"/>	15421	Simms, Lucille S.	S Single	2007	02/22/07	
	Number of Allowances: 2		Additional Withholding: \$		.00	
	Name Chg: X		Exempt Status:	Confirmed: X	Request Time: 15:22:14	

Opt: 1=Print 2=Change 3=Add F3=Exit

#### 4. Change the data in the required fields and click Enter.

06303 Federal W-4 Maintenance

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Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
More Details

06303 Federal W-4 Maintenance

By Year:   
By Employee:

P	Number	Employee Name	W-4 Marital Status	Year	Date	Request
<input checked="" type="checkbox"/>	150507 *		M *	2007 *		
	Number of Allowances: 4 *		Additional Withholding: \$		350.00	
	Name Chg: <input checked="" type="checkbox"/>		Exempt Status: <input type="checkbox"/>	Confirmed: <input checked="" type="checkbox"/>	Request Time: 19:25:20	
<input type="checkbox"/>	15126	Cane, Phillip R.	H Married, withhold at high	2006	12/21/06	
	Number of Allowances: 4		Additional Withholding: \$		250.00	
	Name Chg:		Exempt Status:	Confirmed: X	Request Time: 19:26:00	
<input type="checkbox"/>	15420	Perimore, Mary B.	H Married, withhold at high	2006	01/08/07	
	Number of Allowances: 0		Additional Withholding: \$		.00	
	Name Chg:		Exempt Status:	Confirmed: X	Request Time: 17:14:19	
<input type="checkbox"/>	15420	Perimore, Mary B.	S Single	2007	02/22/07	
	Number of Allowances: 3		Additional Withholding: \$		.00	
	Name Chg:		Exempt Status:	Confirmed: X	Request Time: 10:53:51	
<input type="checkbox"/>	15421	Simms, Lucille S.	S Single	2007	02/22/07	
	Number of Allowances: 2		Additional Withholding: \$		.00	
	Name Chg: X		Exempt Status:	Confirmed: X	Request Time: 15:22:14	

Opt: 1=Print 2=Change 3=Add F3=Exit

The system displays the new record.

06303 Federal W-4 Maintenance

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06303 Federal W-4 Maintenance

By Year:   
By Employee:

0	Address	Employee Name	W-4 Marital Status	Year	Request Date
<input type="checkbox"/>	50507	Rohrer, Mike G.	M Married	2007	03/08/07
Number of Allowances:		4	Additional Withholding: \$	350.00	
Name Chg: X		Exempt Status:	Confirmed: X	Request Time: 14:51:08	
<input type="checkbox"/>	50508	Merriwether, Beth S.	S Single	2007	03/02/07
Number of Allowances:		0	Additional Withholding: \$	.00	
Name Chg: X		Exempt Status:	Confirmed: X	Request Time: 9:33:03	

Opt: 1=Print 2=Change 3=Add F3=Exit

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# Working with Event Reports

You use a set of World Writer reports for each set of history files for a specific employee program. Each history file includes two or more searches, one for event and the other by employee. The event search includes event, event effective date, and employee. The employee search includes employee, event, and event effective date. Additionally, separate versions exist for the following:

- Phone number history file, Address Book (Phone) History - ERM Electronic Signature (F0115H), in Address Event Reports
- Participant information history file, Participant File History for ERM/ESIG (F08901H), in Participant Event Reports
- Dependent/Beneficiary X-Ref history file, Dependents/Beneficiaries X-Ref History for ERM/ESIG (F08336H), in Benefits Event Reports

The electronic signature field values exist in all of these reports, which the system stores and copies to the history files. The electronic signature prints on the first line of each record of the report and includes the event, employee number, date the employee confirms their choice, and the date management uploads the choice to production.

You can copy and modify any version to suit your business needs.

To access the Electronic Signature Reports using World Writer, you use the Employee Resource Management menu G08ESSM.

## Address Event Reports

The Address Event reports extract and report any changes an employee makes to their address. The system uses the information from the following history files:

- Address Book Master History - for ERM Electronic Signature (F0101H)
- Address Book (WW) History - ERM Electronic Signature (F0111H)
- Address Book (Phone) History - ERM Electronic Signature (F0115H)
- Address by Date History - ERM Electronic Signature (F0116H)

You use two reports for the name and address changes and two for the telephone changes.

## Address Change (Only) by Employee

Address Change (Only) by Employee											Page	-	1
Address Number	Name and Address Information	Employee (Y/N)	Event	Event Description	Event Effective Date	Confirm Date	Confirm Time	Date Uploaded	Electronic Signature	User Request	Date	-	06/22/04
15451	Karen B. Miller First Name . . Karen Middle Name. . Bethene Last Name. . . Miller 495 S. Pearl Street Denver CO 80322	Y	AD	Address Change	06/25/04	06/22/04	115926	06/22/04	AD00015451040622115926	A			*
-----													
Total Address Changes													
Cnt 1													

## Phone Change (Only) by Employee

Phone Change (Only) by Employee											Page	-	1
Address Number	Name	Employee (Y/N)	Event	Event Description	Event Effective Date	Confirm Date	Confirm Time	Date Uploaded	Electronic Signature	User Request	Date	-	06/22/04
15451	Karen B. Miller (303) 934-3492 HOME	Y	AD	Address Change	06/25/04	06/22/04	115926	06/22/04	AD00015451040622115926	A			*
15451	Karen B. Miller (720) 459-8831 AUTO	Y	AD	Address Change	06/25/04	06/22/04	115926	06/22/04	AD00015451040622115926	A			*
-----													
Total Phone Number Changes													
Cnt 2													

## Benefit Event Reports

The Benefit Event reports extract and report changes or elections the employee makes during the benefits enrollment process. These events include new hires, employees with a life change event, retirement, or annual benefits enrollment.

There are four report versions you use to report changes in the Employee Enrollment History (F08330H) and Employee Pay Instructions History (F06106H) files. You can generate reports for changes to employee benefit plans that include rates. You can also generate reports for changes to dependents and beneficiaries for new plans or changes to plans from data in the Dependents/Beneficiaries X-Ref History for ERM/ESIG file (F08336H). Other benefits history files for which you can generate reports include the following files:

- 401(k) Elections History for ERM/ESIG (F08346H)
- Flexible Spending Accts History for ERM/ESIG (F08370H)
- Pension Plan Activity History for ERM/ESIG (F08501H)

You can create additional report versions for employee data, if necessary.

## Benefit Change (Plans/D/B) by Employee

Benefit Change (Plans/D/B) by Employee										Page	-	1
Address Number	Name	Event	Event Description	Event Effective Date	Confirm Date	Confirm Time	Date Uploaded	Electronic Signature	User Request	Date	-	06/22/04
15451	Karen B. Miller	OE	Open Enrollment	07/01/04	06/22/04	120343	06/22/04	0E00015451040622120343	C			A
9203120	Jack F. Miller	DEN-01	Dental - EE plus one	01/01/03 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	0,00			A
15451	Karen B. Miller	OE	Open Enrollment	07/01/04	06/22/04	120343	06/22/04	0E00015451040622120343	0,00			A
9203120	Jack F. Miller	DEN-01	Dental - EE plus one	07/01/04 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	0,00			A
15451	Karen B. Miller	OE	Open Enrollment	07/01/04	06/22/04	120343	06/22/04	0E00015451040622120343	0,00			A
9203138	Kassandra C. Miller	DEN-01	Dental - EE plus one	07/01/04 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	0,00			A
15451	Karen B. Miller	OE	Open Enrollment	07/01/04	06/22/04	120343	06/22/04	0E00015451040622120343	0,00			A
9203146	Ryan L. Miller	DEN-01	Dental - EE plus one	07/01/04 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	0,00			A
15451	Karen B. Miller	OE	Open Enrollment	07/01/04	06/22/04	120343	06/22/04	0E00015451040622120343	0,00			A
9203120	Jack F. Miller	LIFE	Life Insurance Plan	2X 07/01/04 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	0,00			A
15451	Karen B. Miller	OE	Open Enrollment	07/01/04	06/22/04	120343	06/22/04	0E00015451040622120343	0,00			A
9203120	Jack F. Miller	MED+FAM	Medical Plan - Plus Family	01/01/03 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	0,00			A
15451	Karen B. Miller	OE	Open Enrollment	07/01/04	06/22/04	120343	06/22/04	0E00015451040622120343	0,00			A
9203120	Jack F. Miller	MED+FAM	Medical Plan - Plus Family	07/01/04 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	0,00			A
15451	Karen B. Miller	OE	Open Enrollment	07/01/04	06/22/04	120343	06/22/04	0E00015451040622120343	0,00			A
9203138	Kassandra C. Miller	MED+FAM	Medical Plan - Plus Family	07/01/04 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	0,00			A
15451	Karen B. Miller	OE	Open Enrollment	07/01/04	06/22/04	120343	06/22/04	0E00015451040622120343	0,00			A
9203146	Ryan L. Miller	MED+FAM	Medical Plan - Plus Family	07/01/04 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	0,00			A
Total Dependents/Beneficiaries for 15451 Karen B. Miller												
Cnt										9		
Total Dependents/Beneficiaries												
Cnt										9		

## Benefit Change (Plans/Rates) by Employee

Benefit Change (Plans/Rates) by Employee										Page	-	1
Address Number	Name	Event	Event Description	Event Effective Date	Confirm Date	Confirm Time	Date Uploaded	Electronic Signature	User Request	Date	-	06/22/04
15451	Karen B. Miller	OE	Open Enrollment	07/01/04	06/22/04	120343	06/22/04	0E00015451040622120343	C			A
9203120	Jack F. Miller	DENTAL	Dental - EE plus one	01/01/03 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	0,0000			A
15451	Karen B. Miller	OE	Open Enrollment	07/01/04 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	29,6300-			A
9203120	Jack F. Miller	DENTAL	Dental - EE plus one	07/01/04 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	3,0000			A
15451	Karen B. Miller	OE	Open Enrollment	07/01/04 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	0,0000			A
9203120	Jack F. Miller	LIFE	Life Insurance Plan	2X 07/01/04 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	0,0000			A
15451	Karen B. Miller	OE	Open Enrollment	07/01/04 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	115,0000-			A
9203120	Jack F. Miller	MEDICAL	Medical Plan - Plus Family	01/01/03 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	56,0000			A
15451	Karen B. Miller	OE	Open Enrollment	07/01/04 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	1,5600-			A
9203120	Jack F. Miller	MEDICAL	Medical Plan - Plus Family	01/01/03 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	1,5600-			A
15451	Karen B. Miller	OE	Open Enrollment	07/01/04 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	1,5600-			A
9203120	Jack F. Miller	SPENDING	SPND-MED FSpending Acct for Medical	07/01/04 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	1,5600-			A
15451	Karen B. Miller	OE	Open Enrollment	07/01/04 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	1,5600-			A
9203120	Jack F. Miller	VISION	VISION Employee only	07/01/04 To: 06/30/04	06/22/04	120343	06/22/04	0E00015451040622120343	1,5600-			A
Totals for Address Number 15451 Karen B. Miller												
Sum										87,1900-		
Cnt										7		
Total Benefit Changes												
Cnt										7		

## Federal W-4 Event Reports

The Federal W-4 event reports extract and report changes employees make to their Federal W-4 information.

There are four report versions you use to report changes to Federal W-4 history information. You can generate reports by year or employee when you upload information to the Federal W-4 History (F06303H) and Employee Tax Exemptions/Overrides History File - ERM (F06017H) files. If you upload data to only the F06303H file, use the W46303EM - F06303H Only - By Employee version. If the manager enters the Federal W-4 employee record using the Federal W-4 Inquiry/Maintenance program, use the W4-MGR-YR - F06303H Only - Manager Entry version to generate a report of these records.

## Federal W-4 by Employee

Federal W-4 History by User										
Employee Number	Employee Name	Event	Description	Event Effective Date	Confirm Date	Confirm Time	Date Uploaded	Electronic Signature	User Request	Approval Status
15136 JAMES L. MOORE		W-4 Change Federal W-4		12/21/06	12/21/06	12:21:16	12/21/06	W400000130061221152333	A	A
Year: 2006 NEW W-4: W-4 Marital Status: M ** NOT FOUND **										
Number of Allowances: 5 Additional Withholding: 5.000.00										
Name Change: Request Status: Confirmed: X Request Time: 182529										
Tax Type: A Tax Area Override: FEDERAL Additional Flat Tax \$1: A										
15136 JAMES L. MOORE		W-4 Change Federal W-4		12/21/06	12/21/06	12:22:06	12/21/06	W400000130061221153400	A	A
Year: 2006 NEW W-4: W-4 Marital Status: M ** NOT FOUND **										
Number of Allowances: 5 Additional Withholding: 5.000.00										
Name Change: Request Status: Confirmed: X Request Time: 182609										
Tax Type: A Tax Area Override: FEDERAL Additional Flat Tax \$1: A										
18420 Mary S. Serinore		W-4 Change Federal W-4		01/04/07	01/04/07	14:05:57	01/04/07	W4000001842001041311445	C	A
Year: 2006 FILING YEAR W-4: W-4 Marital Status: S ** NOT FOUND **										
Number of Allowances: 3 Additional Withholding: 100.00										
Name Change: Request Status: Confirmed: X Request Time: 171419										
Tax Type: A Tax Area Override: FEDERAL Additional Flat Tax \$1: A										
18420 Mary S. Serinore		W-4 Change Federal W-4		02/21/07	02/22/07	10:03:09	02/22/07	W4000001842002211535555	A	A
Year: 2007 FILING YEAR W-4: W-4 Marital Status: S ** NOT FOUND **										
Number of Allowances: 3 Additional Withholding: 100.00										
Name Change: Request Status: Confirmed: X Request Time: 136911										
Tax Type: A Tax Area Override: FEDERAL Additional Flat Tax \$1: A										
18421 Lucille S. Stone		W-4 Change Federal W-4		02/21/07	02/22/07	10:03:09	02/22/07	W4000001842102221153216	A	A
Year: 2007 NEW W-4: W-4 Marital Status: S ** NOT FOUND **										
Number of Allowances: 3 Additional Withholding: 100.00										
Name Change: Request Status: Confirmed: X Request Time: 136911										
Tax Type: A Tax Area Override: FEDERAL Additional Flat Tax \$1: A										
18304 Mary S. Serinore		W-4 Change Federal W-4		02/21/07	02/22/07	10:03:09	02/22/07	W400000183040222115314857	A	A
Year: 2007 NEW W-4: W-4 Marital Status: S ** NOT FOUND **										
Number of Allowances: 3 Additional Withholding: 100.00										
Name Change: Request Status: Confirmed: X Request Time: 136911										
Tax Type: A Tax Area Override: FEDERAL Additional Flat Tax \$1: A										
83500 Justin F. Swiden		W-4 Change Federal W-4		02/14/07	02/14/07	14:06:57	02/14/07	W400000835000214144459	C	A
Year: 2007 FILING YEAR W-4: W-4 Marital Status: S ** NOT FOUND **										
Number of Allowances: 3 Additional Withholding: 100.00										
Name Change: Request Status: Confirmed: X Request Time: 144419										
Tax Type: A Tax Area Override: FEDERAL Additional Flat Tax \$1: A										
83501 Justin F. Swiden		W-4 Change Federal W-4		02/14/07	02/14/07	14:06:57	02/14/07	W400000835010214144459	A	A
Year: 2007 FILING YEAR W-4: W-4 Marital Status: S ** NOT FOUND **										
Number of Allowances: 3 Additional Withholding: 100.00										
Name Change: Request Status: Confirmed: X Request Time: 144419										
Tax Type: A Tax Area Override: FEDERAL Additional Flat Tax \$1: A										

## Participant Event Reports

The Participant Event reports extract and report changes or additions employees make to participants. There are four report versions.

You use two report versions to generate information from the Dependents/Beneficiaries X-Ref History for ERM/ESIG (F08336H) file. These two reports include changes employees make to participants from data in the Dependents/Beneficiaries X-Ref (F08336) and Participant File (F08901) files. A third version you use to report participant information from the Participant History (F08901H) file. This report includes only those changes employee's make to participants on the Participant Information - ERM screen in the Participant File (F08901) file. A fourth version you use to report only those changes to participant information on the Participants by Employee- ERM screen in the Dependents/Beneficiaries X-Ref (F08336) file. This version includes data from the F08336H file.

## Participant Change by Employee (Changes to F08336H and F08901H)

Participant Change by Employee										
										Page Date
										1 - 03/14/07
Address Number	Name	Event	Description	Event Effective Date	Confirm Date	Confirm Time	Date Uploaded	Electronic Signature	User Request	Approval Status
15125	Susan L. Moore	DB	Participant Change	07/01/07	03/14/07	134612	03/14/07	000001125070314194612	C	Y
Participant Number: 12427 Name: Phyllis L. Krueger Tax ID: 024534839 Gender: F Effective Date: To: Relationship: F Parent SS Grad: V PT Student: N School Attending: Employed: N Disability: N Date of Disability: Date of Birth: 04/06/30 Date of Medicare: Date of Death:										
Total Dependent/Beneficiary change(s) for 15125 Susan L. Moore										
Cnt 1										
15126	Phillip R. Cane	DB	Participant Change	11/01/06	12/01/06	132103	12/01/06	0000011260612110103	C	Y
Participant Number: 12993 Name: Alice F. Thomas Tax ID: 003772612 Gender: F Effective Date: To: Relationship: F Parent SS Grad: V PT Student: N School Attending: Employed: Y Disability: N Date of Disability: Date of Birth: 04/08/31 Date of Medicare: Date of Death:										
Total Dependent/Beneficiary change(s) for 15126 Phillip R. Cane										
Cnt 1										
Total Dependent/Beneficiary changes										
Cnt 2										

## Participant Information (Changes to F08336H only)

Participant Information F08336H										
										Page Date
										1 - 03/14/07
Address Number	Name	Event	Description	Event Effective Date	Confirm Date	Confirm Time	Date Uploaded	Electronic Signature	User Request	Approval Status
15126	Phillip R. Cane	DB	Participant Change	11/01/06	12/01/06	132103	12/01/06	0000011260612110103	C	Y
Participant Number: 12993 Name: Alice F. Thomas Tax ID: 003772612 Gender: F Effective Date: To: Relationship: F Parent SS Grad: V PT Student: N School Attending: Employed: Y Disability: N Date of Disability: Date of Birth: 04/08/31 Date of Medicare: Date of Death:										
15125	Susan L. Moore	DB	Participant Change	07/01/07	03/14/07	134612	03/14/07	000001125070314194612	C	Y
Participant Number: 12427 Name: Phyllis L. Krueger Tax ID: 024534839 Gender: F Effective Date: To: Relationship: F Parent SS Grad: V PT Student: N School Attending: Employed: N Disability: N Date of Disability: Date of Birth: 04/06/30 Date of Medicare: Date of Death:										
15125	Susan L. Moore	DB	Participant Change	07/01/07	03/14/07	134612	03/14/07	000001125070314194612	C	Y
Participant Number: 12427 Name: Phyllis L. Krueger Tax ID: 024534839 Gender: F Effective Date: To: Relationship: F Parent SS Grad: V PT Student: N School Attending: Employed: N Disability: N Date of Disability: Date of Birth: 04/06/30 Date of Medicare: Date of Death:										
Total Participant Only changes										
Cnt 3										

## Participant History Only (Changes to F08901H only)

Participant History Only - F08901H										
										Page Date
										1 - 03/14/07
Address Number	Name	Event	Description	Event Effective Date	Confirm Date	Confirm Time	Date Uploaded	Electronic Signature	User Request	Approval Status
15125	Susan L. Moore	DB	Participant Change	12/21/06	12/21/06	133612	12/21/06	000001125061221133612	C	Y
Participant Number: 12993 Name: Alice F. Thomas Tax ID: 003772612 Gender: F Effective Date: To: Relationship: F Parent SS Grad: V PT Student: N School Attending: Dever Art Academy Employed: N Disability: N Date of Disability: Date of Birth: 04/06/30 Date of Medicare: Date of Death:										
15126	Phillip R. Cane	DB	Participant Change	11/01/06	12/01/06	132103	12/01/06	0000011260612110103	C	Y
Participant Number: 12993 Name: Alice F. Thomas Tax ID: 003772612 Gender: F Effective Date: To: Relationship: F Parent SS Grad: V PT Student: N School Attending: Employed: Y Disability: N Date of Disability: Date of Birth: 04/08/31 Date of Medicare: Date of Death:										
15126	Paul R. Wenz	DB	Participant Change	01/24/07	02/14/07	144167	02/14/07	000001126070214144167	C	Y
Participant Number: 13128 Name: First E. 0000000 Tax ID: 001243070 Gender: F Effective Date: To: Relationship: S Spouse SS Grad: V PT Student: N School Attending: Employed: N Disability: N Date of Disability: Date of Birth: 11/06/69 Date of Medicare: Date of Death:										
15127	Martin B. Luchowski	DB	Participant Change	03/27/07	03/27/07	134694	03/28/07	000001127070327134694	C	Y
Participant Number: 12318 Name: Kathryn C. Luchowski Tax ID: 019209023 Gender: F Effective Date: To: Relationship: S Spouse SS Grad: V PT Student: N School Attending: Dever Gourmet Cooking School Employed: Y Disability: N Date of Disability: Date of Birth: 05/07/68 Date of Medicare: Date of Death:										
Total Participant Only changes										
Cnt 4										

## Time Entry Event Reports

You use the time entry event reports to extract and generate reports for the time entry records employees enter. The two report versions include time entry records from the Employee Transactions Detail History (F06116H) file.

## Time Entry by Employee

Time Entry by Employee													Page	-	1
Address	Name	Batch	Event	Event	Confirm	Confirm	Supervisor	Time-Date	Approver	Date	Electronic	User	-	06/22/04	
Number		Number		Description	Effective Date	Date	Time	Approved	Sign-On	Uploaded	Signature	Request	Status		
*****															
15451 Karen B. Miller		58744	TE	Time Entry	06/25/04	06/22/04	124420								
Pay Type		Hours	Lump Sum	Work Date Equipment Job Typ/St Job Location Phas Code/Rate/Dif	Item	Pieces	Ovr. Rate	Blg. Rate							
1 Regular		33,00	0,00	06/24/04	8M-3 1	701	0,000 H	0,00	.500,000	0,000					
				Account:	701.8115	.	Subledger:	Subledger Type:	Transaction:	227226	701				
				Piecework Rate:	0,000	Uprate:	0,000	Union:	7000	Record Type:	1 Home Business Unit:	701			
				Position ID:	Home Company: 00007 Workers Comp Code: 5651 Workers Sub Class:										
				Comments:	Regular Work										
*****															
15451 Karen B. Miller		58744	TE	Time Entry	06/25/04	06/22/04	124420						A	A	
Pay Type		Hours	Lump Sum	Work Date Equipment Job Typ/St Job Location Phas Code/Rate/Dif	Item	Pieces	Ovr. Rate	Blg. Rate							
5 Regular-sep		10,00	0,00	06/25/04	8M-3 1	701	0,000 H	0,00	16,500	0,000					
				Account:	701.8110	.	Subledger:	Subledger Type:	Transaction:	227225	701				
				Piecework Rate:	0,000	Uprate:	0,000	Union:	7000	Record Type:	1 Home Business Unit:	701			
				Position ID:	Home Company: 00007 Workers Comp Code: 5651 Workers Sub Class:										
				Comments:	Special Project										
*****															
Totals for Address Number 15451 Karen B. Miller															
Sum		43,00	0,00												
*****															
Grand Totals for Time Entry															
Cnt	2														
Sum		43,00	0,00												



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## 6 Processing Options

### Enrollment - Rules and Eligibility SS (P08334SS)

Processing Option	Processing Options Requiring Further Description
<ol style="list-style-type: none"><li>1. Enter the default status to use for ending enrollment.</li><li>2. Enter a '1' to not process ineligible enrollment.  (Default of blank will process an enrollment regardless of the eligibility.)</li><li>3. Enter a '1' to enroll the employee in the default plan(s) in each category if no other plans are selected. This will happen automatically when the enrollment update option is taken.</li><li>4. Enter a "Skip to" query name to be used when the print function key is pressed to call the WORLD Writer versions list. Blank will display the entire list for Benefits World Writers (Group Q083).</li><li>5. Enter the End Enrollment Status to be used when changing options within a plan.</li><li>6. Enter a three digit code to designate that an employee has a future enrollment for a plan. Default of blank will use 'XXX' to signify future enrollment exists.</li></ol>	

Processing Option	Processing Options Requiring Further Description
<p>7. Enter Ending Status for plan ending date that defaults from Plans Within Categories.</p> <p>Set Up Information for 'PC/Web Access'*****:</p> <p>Within the Plan Selection screen there is the opportunity to display 3 diff. items at the category level and 1 item each for each plan displayed in the category subfile/list. An item can be a Word document, spreadsheet or web site.</p> <p>When a specific action is performed by the user in the JWalk panel for 'Plan selection, the item or information you have set-up will appear. The 3 actions at the category level and 1 action for each plan within the category and two required fields are explained below.</p> <p>HEADER FIELD: The 'Header Field' is the category field displayed on the screen.</p> <p>It is named VDSBGR. The Header Field will need to be entered in 'Event Set-Up</p> <p>' for Open Enrollment (OE), Retirement (RT), and Life Change (LC) events. This is the way you will control which group categories will be available to the employee to elect/change. VDSGGR will need to be entered along with the specific category you wish to include (ie. MEDICAL, DENTAL, etc.).</p> <p>Within 'PC/Web Access Set Up' the Header Field (VDSBGR) will default in for all the JWalk Events. However, you need to enter the specific category in 'Header Field Value' field (ie. MEDICAL) to match the information you are setting up.</p> <p>Next you can select any or all of the items possible to be associated with the above category. Your 3 options follow.</p> <p>ITEM 1 (POPEN) is displayed right before the 'Plan Selection' panel is displayed.</p> <p>This will allow you to display inform. you want the user to see before viewing or selecting a plan for the category.</p> <p>The JWalk event is called POPEN standing for 'panel open'. The fields required in PC/Web Access Setup are the JWalk event, Header Field Value, Access Type, and PC/Web Name &amp; Path.</p> <p>ITEM 2 (PUSH1) is displayed when the user presses on the first button in the upper right of the JWalk Panel. It has been suggested this could open a 'Plan Comparison' doc; however, your needs and interests may differ. Since this is a button, you can determine what the title of this button will say to guide your users. The user action and JWalk event is called PUSH1. The fields req. in PC/Web Access Setup are the JWalk event, Header Field Value, Access</p>	

## Time Entry by Employee (P061121S)

Processing Option	Processing Options Requiring Further Description
<ol style="list-style-type: none"> <li>1. Enter 'E' to use the Employee Occupational Pay Rate Table or Enter 'U' to use the Union Rate Table.  If neither 'E' nor 'U' is entered, blank is the default and the Hourly Rate from Employee Multiple Job File will be used.</li> <li>2. If the Union Table is selected, enter ONLY the Pay Type codes associated with the entries you made in your Union Table.  If you entered Regular Pay Rate in Union Table, enter Pay Type code here.  If you entered Premium Amounts in Union Table, enter their Pay Type codes here also.  If the Occupational Table is selected, ONLY enter the Pay Type code for "Regular".  Regular - Blank Overtime - A Doubletime - B Triplettime - C Holiday - D  NOTE: If you have entered codes in fields A, B, C, or D; Time Entry will retrieve amounts from table before applying overrides, such as Shift Differential. If Union Table premiums are NOT found, but you entered Pay Type codes in A, B, C, or D, the Pay Type Multiplier will also be applied before Shift Differential overrides.</li> <li>3. Enter '1' if using Multiple Jobs feature. (Please refer to program helps for information about this processing option).</li> <li>4. Enter '1' to prevent changes and deletes to records locked to another user.</li> <li>5. Enter '1' to edit Pay Type with job type and step from the Classification/Pay Cross Reference screen.</li> </ol>	

Processing Option	Processing Options Requiring Further Description
<p>6. Enter '1' to use Zero Billing Rate.</p> <p>7. Enter '1' to load Pay Type Desc. into Explanation field (YTEXR).</p> <p>8. Enter '1' to request Canadian Employee Entry. Default is ' ' to request US Employee Entry.</p> <p>9. Enter '1' to automatically split time based on Labor Distribution or Position Account Distribution instructions. Default is ' ' and time will not be split unless F12 is used during Time Entry.</p> <p>10. Enter '1' to default Equipment Worked On (EQWO) from referenced Work Order.</p> <p>Set Up Information for 'PC/Web Access':</p> <p>Within the Time Entry JWalk panel there is the opportunity to display one item for information. This item can be a Word document, spreadsheet or web site.</p> <p>When the employee presses the first button on the upper right of the panel, the item or information you have set up will appear. No 'Header' or 'Subfile Field' value will be necessary.</p> <p>Enter the JWalk event (listed to the right of this information), the name and path for your document, spreadsheet or web site, and the button title.</p>	

## View Vacation-Sick (P06093S)

Processing Option	Processing Options Requiring Further Description
<p>1. Enter a '1' to display accrued information.</p> <p>2. Enter a '1' if you do not want dollar amounts displayed.</p>	

Processing Option	Processing Options Requiring Further Description
<p>3. Enter a '1' to display Payroll Month history (F06146) for Calendar Year-End DBAs. A value of blank will display Fiscal or Anniversary (F06147) history.</p> <p>PAGE DOWN for Information regarding PC/Web Access setup for this online application.</p> <p>Set Up Information for 'PC/Web Access'*****.</p> <p>Within 'View Vacation-Sick' JWalk panel is the opportunity to display one item for information. This item can be a Word document, spreadsheet or web site.</p> <p>When the employee presses the first button in the upper right of the panel, the item or information you have set up will appear. No 'Header' or 'Subfile Field' value will be necessary.</p> <p>Enter the JWalk event (listed to the right of this information), the name and path for your document, spreadsheet or web site, and the button title.</p>	

## Dependents/Beneficiaries Assignment (P08336SS)

Processing Option	Processing Options Requiring Further Description

Processing Option	Processing Options Requiring Further Description
<p>1. Enter '1' to display data in the full detail format. Enter '2' to display data in the partial detail format.</p> <p>A blank displays the full detail format.</p> <p>Set Up Information for 'PC/Web Access'*****.</p> <p>Within the Dependent/Beneficiary Change menu option there are two places where information can be set-up/displayed. One is within the P08336SS program; the 2nd is within the P08901SS program. Please consult your manual for more info. This item can be a Word document, spreadsheet or web site. When the employee presses the first button in the upper right of the panel, the item or information you have set up will appear. No 'Header' or 'Subfile' value will be necessary.</p> <p>Enter the JWalk event (listed to the right of this information), the name and path for your document, spreadsheet or web site, and the button title.</p>	

## Change Federal W4 (P0601SS)

Processing Option	Processing Options Requiring Further Description
<p>1. Enter the year for this Federal W-4 Form.</p>	

Processing Option	Processing Options Requiring Further Description
<p>2. Enter the current phone number for Federal IRS for information required for a name change.</p> <p>PAGE DOWN for Information regarding PC/Web Access setup for this online application.</p> <p>Set Up Information for 'PC/Web Access*****.</p> <p>The opportunity exists to setup one item for information in each of the three panels of the 'Change Federal W4' application. This item can be a Word or PDF document, spreadsheet, or website.</p> <p>When the employee presses the button in the panel that bears your title, the item or information will appear. 'No Header' or 'Subfile Field' value will be necessary. Enter the JWalk event listed to the right of each panel number, the name and path for your document, spread- sheet or web site and the button title</p> <p>JWalk Event for Panel/Screen 1</p> <p>JWalk Event for Panel/Screen 2</p> <p>JWalk Event for Panel/Screen 3</p>	

## Federal W-4 Approval (P0601AP)

Processing Option	Processing Options Requiring Further Description
<p>1. Files to be Updated when approved records are uploaded:</p> <p>Blank - Add approved records to the F06303 production file only.</p> <p>1 - Add approved records to the F06303 and the F06017 production files.</p>	

## Federal W-4 Inquiry/Maintenance (P06303)

Processing Option	Processing Options Requiring Further Description
<ol style="list-style-type: none"> <li>1. Determine what operations will be available to the user. Blank - Inquire on all W-4 records within business unit security access. 1 - Inquire, change or add W-4 records within business unit security access.</li> <li>2. Enter the current phone number for Federal IRS for information required for a name change.</li> <li>3. Enter a '1' for printed report to include questions 8, 9, and 10 and the values for company name, address and employer identification number for questions 8 and 10.</li> </ol>	

## Address Change for Employee Self-Service (P01ABSS)

Processing Option	Processing Options Requiring Further Description
<p>Set Up Information for 'PC/Web Access'</p> <p>Within the Address Change JWalk panel is the opportunity to display one item for information. This item can be a Word document, spreadsheet or web site.</p> <p>When the employee presses the first button in the upper right of the panel, the item or information you have set up will appear. No 'Header' or 'Subfile Field' value will be necessary.</p> <p>Enter the JWalk event (listed to the right of this information), the name and path for your document, spreadsheet or web site, and the button title.</p>	



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## 7 Appendices



# Appendix A – Employee Report Examples

## Address Change Confirmation

CLABE Address Change	J.D. Edwards & Company Address Change Confirmation	Page - . . . 1 Date - . . . 3/14/07
Address as of : 03/20/07 Confirmation ID: AD00015422070314155558 Date of Report : 03/14/07		
Mario B. Lucenzio 4201 N. Tennyson Denver CO 80232	Employee Number:	15422
-----		
Requested Changes:		
First Name . . . . .	Mario	
Middle Name . . . . .	B.	
Last Name . . . . .	Lucenzio	
Mailing Address . . .	4201 N. Tennyson	
City . . . . .	Denver	State . . CO
Zip Code . . . . .	80232	
Telephone . . . . .	( 303 ) 988-2932	/ HOME
Telephone . . . . .	( 720 ) 398-5876	/ WEMG
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## Time Entry Report

0611218	J.D. Edwards & Company Time Entry Report										Page 1 Date 03/14/07		
Phillip R. Case 3024 S. Seminal Court Denver CO 80343			Employee Number 15126 Batch Number 10732 Confirm # TR00015126070309122901										
-----													
Pay Types	Hours	Lump Sum	Work Date	Equipment	Job Type / Step	Job Location	Plan Code	Shift Rate	/ Diff	Item	Pieces	Override Rate	Billing Rate
-----													
1 Regular	40.00	.00	04/03/07		/	701	/	/ H	00000000		.00	21.435	.000
Account : 701.8115 Subldgr : Sub Type : Transaction : 000033176													
Pce/St : .000 Updt : .000 Union : Rcty : 1 Business Home Unit : 701													
Tax Authority : 060000000 Position : Home Comp : 00007 Worker's Comp Code : 8816													
Comments : Regular responsibilities													
-----													
100 Overtime 1.5	6.00	.00	04/04/07		/	701	/	/ H	00000000		.00	32.453	.000
Account : 701.8116 Subldgr : Sub Type : Transaction : 000033177													
Pce/St : .000 Updt : .000 Union : Rcty : 1 Business Home Unit : 701													
Tax Authority : 060000000 Position : Home Comp : 00007 Worker's Comp Code : 8816													
Comments : Special client needs													
-----													
801 Vacation	40.00	.00	04/23/07		/	701	/	/ H	00000000		.00	21.435	.000
Account : 701.8192 Subldgr : Sub Type : Transaction : 000033178													
Pce/St : .000 Updt : .000 Union : Rcty : 1 Business Home Unit : 701													
Tax Authority : 060000000 Position : Home Comp : 00007 Worker's Comp Code : 8816													
Comments : Out of town - family													
-----													
Totals	86.00	.00											
-----													

## Federal W-4 by Employee Report

0601E	J.D. Edwards & Company Change Federal W-4 Report	Page: 1
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Federal W-4 for Calendar Year: 2007  
 Date of Report: 03/14/2007  
 Confirmation ID: W400015424070307165646  
 Employee Number: 15424

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Re-Print of PENDING W-4:

1. Name and Address:  
 Name - First, Middle Initial, Last Lee W. Ming  
 Home Address - Street or R. Route 3294 S. Lowell  
 City or Town, State and Zip Code Denver CO 80232
2. Social Security Number: XXX-XX-5424
3. W-4 Marital Status: M - Married

NOTE: If married but legally separated, or your spouse is a non-resident alien, select 'Single'.

4. If your last name differs from that on your social security card, check here. You must call 1 866 772-1213 for a new card.  
 X
5. Total number of allowances you are claiming (from Personal Allowances Worksheet, Line H, or from Deduction and Adjustments and Two-Earner /Two Job Worksheets, if they apply).  
 3
6. Additional amount, if any, you want to withhold from each paycheck.  
 750.00
7. I claim exemption from withholding for 2007 and certify that I meet BOTH of the following conditions for exemption:  
 \* Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability AND  
 \* This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.  
 If you meet both conditions, write 'EXEMPT' here.

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

Yes, I accept.  
 Lee W. Ming  
 Date of Agreement: 03/07/2007  
 Electronic Signature ID: W400015424070307165646

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## Benefit Report – New/Changed Elections

08334E Open Enrollment	J.D. Edwards & Company Benefit Report	Page 1
New/Changed Elections		
Benefits as of: 01/01/08 Confirmation ID: Not Available Date of Report: 03/14/07		
Phillip R. Cane 3024 S. Sentinal Court Denver CO 80343	Employee Number:	15126
Request Changes:		
Benefit Category	Benefit Plan Selected	Option Employee Cost (per pay period)
DENTAL Melissa B. Cane Isabelle S. Cane	Dental - Family 2007 DEN+FAM DEN+FAM	FAM 13.00-
LIFE Melissa B. Cane Isabelle S. Cane	Life Insurance Plan LIFE 075 % LIFE 025 %	5.98-
MEDICAL	Medical - Employee	9.75-
SPENDING	Medical Spending Account	85.00-
VISION	Vision - Premium	3.05-
Cost Per Pay Period:		116.78-
Total Employee Cost:		116.78-

## Benefit Report – Confirmed Elections

08334E Open Enrollment	J.D. Edwards & Company Benefit Report	Page 1
Confirmed Elections		
Benefits as of: 01/01/08 Confirmation ID: OE00015126070314155308 Date of Report: 03/14/07		
Phillip R. Cane 3024 S. Sentinal Court Denver CO 80343	Employee Number:	15126
Request Changes:		
Benefit Category	Benefit Plan Selected	Option Employee Cost (per pay period)
DENTAL Melissa B. Cane Isabelle S. Cane	Dental - Family 2007 DEN+FAM DEN+FAM	FAM 13.00-
LIFE Melissa B. Cane Isabelle S. Cane	Life Insurance Plan LIFE 075 % LIFE 025 %	5.98-
MEDICAL	Medical - Employee	9.75-
SPENDING	Medical Spending Account	85.00-
VISION	Vision - Premium	3.05-
Cost Per Pay Period:		116.78-
Total Employee Cost:		116.78-

## Dependent/Beneficiary Change – Confirmation

08DBE	J.D. Edwards & Company Participant Change Confirmation	Page No. . . . 1 Date - . . . 3/14/07
 Date of Report : 03/14/07		
Susan L. Moore 3493 S. Niagara Way Denver CO 80343		Employee Number: 15125
 -----		
Requested Changes:		
 -----		
Confirmation ID : DB00015125070309112141      Event Effective Date: 06/01/07		
Partic. Number: 32942	Name. . . . . : Moore, Beth K.	Rel: C    D/B: B
Tax ID. . . . . : 923-49-5096	Gender. . . . . : F	Effective Date. . . : To:
HS Grad. . . . . : N	PT. Student. . . : N	School Attending. : Thomas Jefferson High School
Employed. . . . . : N	Disability. . . . : N	Date of Disability:
Date of Birth : 12/07/91	Date of Medicare:	Date of Death . . . :
 -----		
Confirmation ID : DB00015125070314153837      Event Effective Date: 07/01/07		
Partic. Number: 32951	Name. . . . . : Moore, Ralph T.	Rel: P    D/B: B
Tax ID. . . . . : 939-88-8138	Gender. . . . . : M	Effective Date. . . : 12/01/03 To: 07/01/07
HS Grad. . . . . : Y	PT. Student. . . : N	School Attending. : Denver Art Academy
Employed. . . . . : N	Disability. . . . : N	Date of Disability:
Date of Birth : 10/11/32	Date of Medicare:	Date of Death . . . :
 -----		
Confirmation ID : DB00015125070314154612      Event Effective Date: 07/01/07		
Partic. Number: 33427	Name. . . . . : Krieger, Phyllis L.	Rel: P    D/B: B
Tax ID. . . . . : 204-59-6859	Gender. . . . . : F	Effective Date. . . : To:
HS Grad. . . . . : Y	PT. Student. . . : N	School Attending. :
Employed. . . . . : N	Disability. . . . : N	Date of Disability:
Date of Birth : 04/06/35	Date of Medicare:	Date of Death . . . :
 -----		
Address Change Confirmation:		
Confirmation ID : AD00033427070314154731      Event Effective Date: 07/01/07		
First Name . . . . .	Phyllis	
Middle Name. . . . .	L	
Last Name. . . . .	Krieger	
Mailing Address. . .	4982 S. Leyden Way	
	C/O Sunnyvale Assisted Living Center	
	Unit 405	
Telephone. . . . .	Denver CO 80343	
Telephone. . . . .	( 720 ) 982-8473	/ HOME
Telephone. . . . .	( )	/
 -----		

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