PeopleSoft 8.00.01 ePay PeopleBook

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SKU MAEYr8SP1B 1200

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

Contents

Index

About This PeopleBook

The book provides you with the information you will need for implementing and using PeopleSoft ePay. You can order the online version by requesting SKU HRB8SP1R0, or the hard-copy version by requesting SKU MAEYr8SP1B 1200.

This section describes information you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft HRMS product line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in this book, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating around the system and adding, updating, and deleting information using PeopleSoft components, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Because we assume you already know how to navigate around the PeopleSoft system, much of the information in this book is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. This book expands on the material covered in PeopleSoft training classes.

PeopleSoft Application Fundamentals

The *PeopleSoft Payroll Interface PeopleBook* provides you with implementation and processing information for your PeopleSoft ePay system. However, there is additional, essential information describing the setup and design of your system that is contained in a companion volume of documentation called *PeopleSoft Application Fundamentals.*

PeopleSoft Application Fundamentals consists of important topics that apply to many or all PeopleSoft applications across the HRMS product line. Whether you are implementing only PeopleSoft ePay, some combination of products within the product line (for example, PeopleSoft Benefits Administration, Stock Administration, Time & Labor, and Pension Administration), or the entire PeopleSoft HRMS system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals such as setting up control tables and administering security.

In the *PeopleSoft Applications Fundamentals* PeopleBook, we've included common information pertinent to all applications in the HRMS product line, such as defining general options. If you're upgrading from a previous PeopleSoft release, you may notice that we've removed some topics or topic headings from the individual application PeopleBooks and consolidated them in this single reference book. You'll now find only application-specific information in your individual application PeopleBooks. This makes the documentation as a whole less redundant. Throughout each PeopleBook, we provide cross-references to *PeopleSoft Application Fundamentals* and other PeopleBooks.

Below you'll find a list of those *PeopleSoft Application Fundamentals* sections that apply specifically to PeopleSoft ePay.

Introduction to PeopleSoft HRMS introduces you to the basic concepts of PeopleSoft Human Resources and reviews the various activities involved in using the system, including setting up system-wide and HR information, performing daily processes, working with PeopleSoft Human Resources windows, and generating reports.

Administering Security reviews how to set up and maintain security for employee data by using a security tree. This allows you to view and update the reporting relationships among units and use this information to grant and deny user access to employee data. You can also choose to set up employee data security in other ways, if that is what you need.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (www.peoplesoft.com). We post updates and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection Web site: http://www.peoplesoft.com/

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *PeopleSoft 8.00.01 HRMS PeopleBooks* and *PeopleTools 8.12 PeopleBooks,* SKU CD-HRB8SP1R0.

Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

The CD includes the following PeopleBooks (presented in HTML format) that you can print in whole or in part:

PeopleSoft 8.00.01 Application Fundamentals for PeopleSoft HRMS

PeopleSoft 8.00.01 Base Benefits

PeopleSoft 8.00.01 Benefits Administration

PeopleSoft 8.00.01 eBenefits

PeopleSoft 8.00.01 eCompensation

PeopleSoft 8.00.01 eDevelopment

PeopleSoft 8.00.01 eEquity

PeopleSoft 8.00.01 ePay

PeopleSoft 8.00.01 eProfile

PeopleSoft 8.00.01 eRecruit

PeopleSoft 8.00.01 eTime

PeopleSoft 8.00.01 FSA Administration

PeopleSoft 8.00.01 Global Payroll

PeopleSoft 8.00.01 Human Resources

PeopleSoft 8.00.01 Payroll for North America

PeopleSoft 8.00.01 Payroll Interface

PeopleSoft 8.00.01 Pension Administration

PeopleSoft 8.00.01 Stock Administration

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press Web site from the Documentation section of

PeopleSoft Customer Connection. The PeopleSoft Press Web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet	From the main PeopleSoft Internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order. PeopleSoft Internet site: http://www.peoplesoft.com/.
Telephone	Contact Consolidated Publishing Incorporated (CPI) at **800 888 3559.**
Email	Email CPI at callcenter@conpub.com.

Required Fields in Pages

When you see a field in a page with an asterisk (*) preceding the field name, it means the field is required. You cannot save a page without entering data into all of the required fields in the page.

Example of a required field label

In some unique instances a field may be required even though there is no asterisk preceding the field name. In such cases, you will be prompted to enter data in these fields before saving the page.

Typographical Conventions and Visual Cues

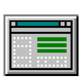
To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

`monospace font`	Indicates PeopleCode.

Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold). We also use boldface when we refer to navigational paths, menu names, or process actions (such as **Save** and **Run**).
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears, we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0*, not the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
Jump links	Indicates a jump (also called a link, hyperlink, or hypertext link). Click a jump to move to the jump destination or referenced section.
Cross-references	The phrase For more information indicates where you can find additional documentation on the topic at hand. We include the navigational path to the referenced topic, separated by colons (:). Capitalized titles in *italics* indicate the title of a PeopleBook; capitalized titles in normal font refer to sections and specific topics within the PeopleBook. Cross-references typically begin with a jump link. Here's an example:

For more information, see Documentation on CD-ROM in *About These PeopleBooks:* Additional Resources.

• Topic list	Contains jump links to all the topics in the section. Note that these correspond to the heading levels you'll find in the Contents window.
 Name of Page	Opens a pop-up window that contains the named page. Click the icon to display the page. Some screen shots may also appear inline (directly in the text).

Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!,** the note is crucial and includes information that concerns what you need to do for the system to function properly.

Text in this bar indicates For more information cross-references to related or additional information.

Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Page Introductory Table

In the documentation, each page description in the application will include an introductory table with pertinent information about the page. Not all of the information will be available for all pages.

Usage	Describes how you would use the page or process.
Object Name	Gives the system name of the page or process as specified in the PeopleTools Application Designer. For example, the Object Name of the Detail Calendar page is DETAIL_CALENDAR1.
Navigation	Provides the path for accessing the page or process.
Prerequisites	Specifies which objects must have been defined before you use the page or process.
Access Requirements	Specifies the keys and other information necessary to access the page. For example, **SetID** and **Calendar ID** are required to open the Detail Calendar page.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft HRMS Product Documentation Manager
PeopleSoft, Inc.
4460 Hacienda Drive
Pleasanton, CA 94588

Or send comments by email to the authors of the PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

Using ePay

PeopleSoft ePay Collaborative Applications consist of PeopleSoft transactions that provide your employees convenient access to information using a browser. Access to information by all of your employees is flexible, convenient, and easy. For many people, these transactions provide an improved alternative to automated telephone prompting systems, and they can help ease the workload for internal support staff and customer service representatives.

In ePay, we produce several Internet pages as templates. You can use the PeopleTools Application Designer to modify and configure the Internet pages just as you would any application page.

For more information**,** see PeopleSoft Application Designer in your *PeopleSoft PeopleTools* PeopleBook.

Components of ePay

PeopleSoft ePay is comprised of five self-service Internet applications that are designed to interface with the Payroll system. These applications will allow employees to review, add, update, and delete (where appropriate) their payroll information.

- Direct Deposit allows your employees to display, add, change, or discontinue direct deposit instructions.
- View Paycheck allows your employees to review paycheck information for earnings, taxes, deductions, and net pay distribution. (PeopleSoft Payroll for North America users only.)
- 3rd Party Pay Inquiry allows your employees to review paycheck information for earnings, taxes, deductions, and net pay distribution. (PeopleSoft Payroll Interface users only.)
- Voluntary Deductions allows your employees to add, change, or stop (delete) voluntary deductions.
- W-2 Reissue Request allows your employees to request a duplicate W2 to be sent to either their work or home address.
- W-4 Tax Information allows your employees to change tax withholding data.

The functionality of PeopleSoft ePay is available to those using PeopleSoft Payroll for North America or PeopleSoft Payroll Interface.

Understanding Roles

PeopleSoft ePay currently provides self-service Internet pages for the role of Employee. We deliver definitions for this role and define a menu for this role.

Employees have access to all five of the self-service Internet pages discussed in this documentation.

Understanding Security

The user profile that you create for each individual who will access your self-service Internet application determines which Internet pages the user will have access to by default. You create user profiles in Maintain Security in the User Profile component. You assign a role to each user profile, which is linked to access control lists. Each access control list identifies pages that individuals can access. To modify the access for specific Internet pages for each role, you modify the access control list for the user's role.

You also define which data the user has access to in the user profile.

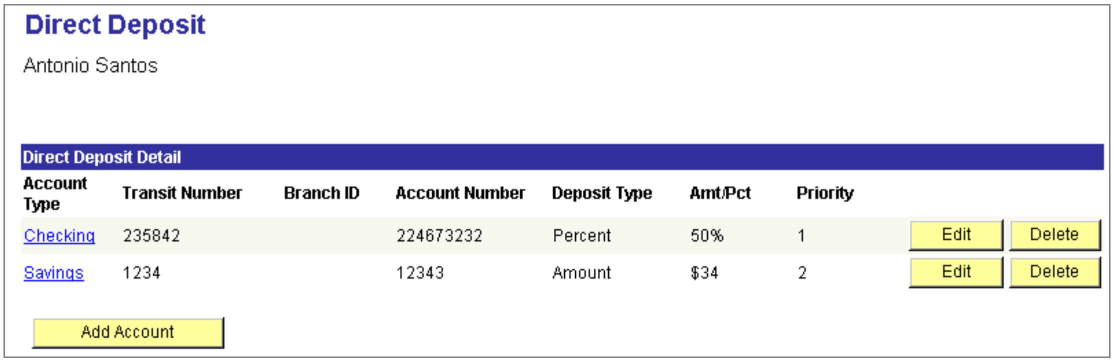
For more information about user profiles, roles, and access control lists; see Administering Security in your *PeopleSoft Application Fundamentals* PeopleBook.

Using Direct Deposit

Employees can display or change their direct deposit information.

Direct Deposit Page

Usage	Employees use the Direct Deposit page to display, add, change, or delete their direct deposit information.
Object Name	PY_IC_DD_LIST
Navigation	**Self Service, Employee, Task, Direct Deposit**



Direct Deposit page

The Direct Deposit page displays direct deposit information, such as the **Account Type,** Bank **Transit Number, Account Number, Deposit Type, Amt/Pct** (amount/percent), and **Priority** order in which the deposits are to be executed.

Employees use this page to add, change (edit), or delete their direct deposit information.

Employees click the **Add Account** button to add a direct deposit, click the **Edit** button next to the item when they want to change a direct deposit; or click the **Delete** button if they want to stop and delete the direct deposit entry.

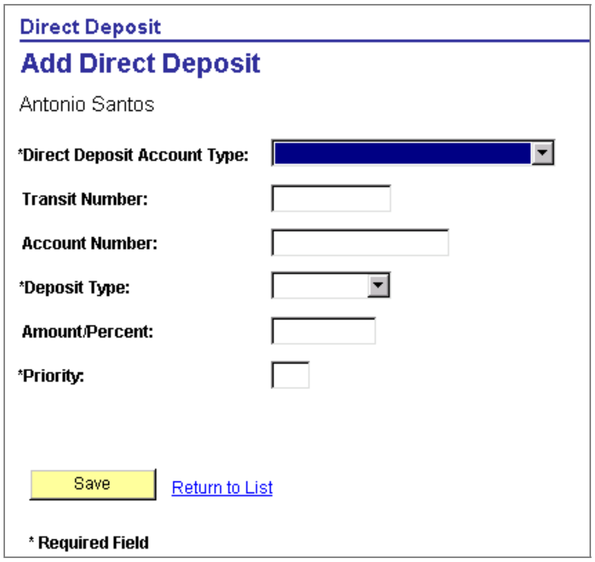
Clicking the **Add Account** button will display the Add Direct Deposit page.

Clicking the **Edit** button will display the Change Direct Deposit page.

Clicking the **Delete** button will display the Delete Confirmation page.

Add Direct Deposit Page

Usage	Employees use the Add Direct Deposit page to add direct deposit information.
Object Name	PY_IC_DD_DATA
Navigation	Click the Add Account button on the Direct Deposit page.



Direct Deposit: Add Direct Deposit page

Select the **Direct Deposit Account Type.** Choosing ***Checking*** or ***Savings*** indicates that you want the direct deposit to be made to a checking or savings account. Choosing ***Issue Check*** means you would like a check for the remaining balance, percentage of net, or a specified flat amount.

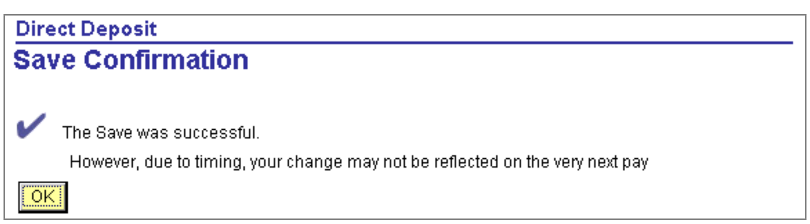
Enter the Bank **Transit Number** and the **Account Number.** An employee will find this information on a blank check or may request the information from his or her financial institution.

Select the **Deposit Type.** Choosing ***Amount*** indicates that you want an exact amount deposited. Choosing ***Balance*** indicates that you want the remaining balance of your net check deposited. Choosing ***Percent*** indicates that you want a certain percentage of your net pay to be deposited.

Enter the **Amount/Percent** that you want deposited.

Enter a number for the **Priority** order in which you want this direct deposit processed. Lower numbers correspond to higher priorities. For example, if you enter a **Priority** order number of ***1*** for one account and a **Priority** order number of ***2*** for another, the account with the **Priority** order number of ***1*** will be processed first.

Click the **Save** button to add a direct deposit. When you do, a Save Confirmation page appears.



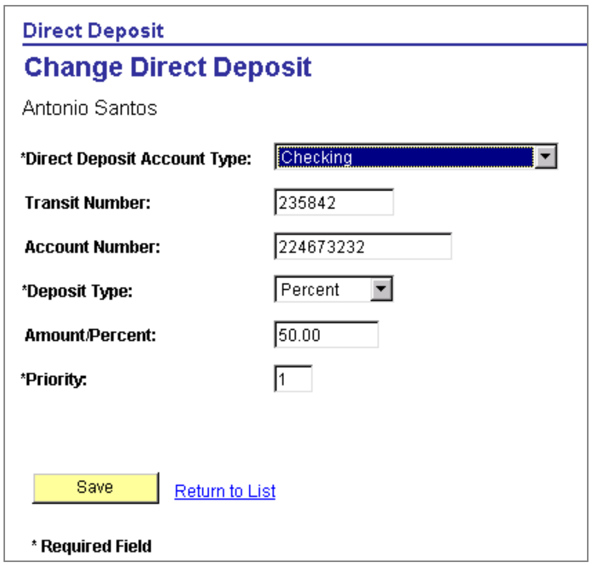
Direct Deposit: Save Confirmation page

Click the **OK** button to return to the Direct Deposit page.

Click the **Return to List** link to return to the Direct Deposit page.

Change Direct Deposit Page

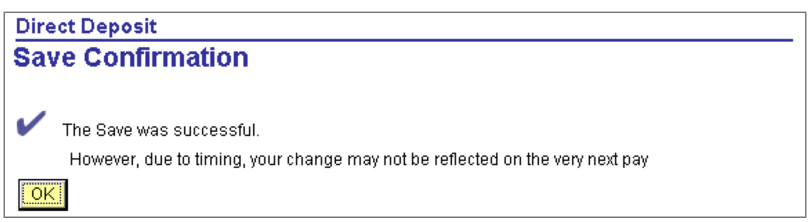
Usage	Employees use the Change Direct Deposit page to change their direct deposit information.
Object Name	PY_IC_DD_DATA
Navigation	Click the Edit button on the Direct Deposit page.



Direct Deposit: Change Direct Deposit page

The fields in this page are identical to those in the Add Direct Deposit page. Select or enter any changes to the direct deposit.

Click the **Save** button to change a direct deposit. When you do, a Save Confirmation page appears.



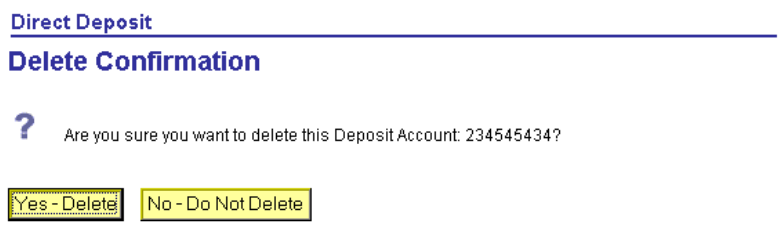
Direct Deposit: Save Confirmation page

Click the **OK** button to return to the Direct Deposit page.

Click the **Return to List** link to return to the Direct Deposit page.

Delete Confirmation Page

Usage	Employees use the Delete Confirmation page to delete their direct deposit information.
Object Name	EO_DEL_CONFIRM
Navigation	Click the Delete button on the Direct Deposit page.



Direct Deposit: Delete Confirmation page

Click the **Yes** or **No** buttons, accordingly.

Using View Paycheck

The View Paycheck page is for the use of PeopleSoft Payroll for North America customers only.

Employees can easily view paycheck information for any confirmed pay period.

View Paycheck Page

Usage	Use the View Paycheck page to review paycheck information for earnings, taxes, deductions, and net pay distribution. The View Paycheck page provides information on confirmed checks and direct deposits, but excludes reversed checks. Paycheck Information is shown at the current and year-to-date level for the most recent paycheck received.
Object Name	PY_IC_PI_DATA
Navigation	**Self Service, Employee, View, View Paycheck**
Access Requirements	Data from the employee's most recent paycheck will be displayed. To view data from a previous paycheck, click the Paycheck Selection link.

View Paycheck

Antonio Santos

Global Business Institute

For a prior pay period, click Paycheck Selection

4689 Z Street		**Employee ID:**	KU0010	**TAX DATA:**	**Federal**	**CA State**
Sacramento	CA 94246	**Department:**	KU001	**Marital Status:**	Married	
		Location:	US HQ	**Allowances:**	2	2
Job Title:	Administrative Assistant	**Pay End Date:**	04/30/2000	**Addl. Percent:**		
SSN:	578-29-0482	**Check Date:**	04/28/2000	**Addl. Amount:**		

	Total Earnings	Cur TaxableGrs	Total Taxes	Total Deductions	Net Pay
Current	398.65	230.94	25.41	299.09	74.15
YTD	7,680.45	4,578.09	598.14	4,750.57	2,331.74

Earnings

Description	Hours	Rate	Amount	YTD Amount
Regular	40.00	8.900000	356.00	6,052.01
Gen Cred			26.73	481.14
Med Cred			15.00	270.00
Den Cred			0.92	16.56
Expenses				25.25
Overtime				337.09
Sick Leave				284.80
Holiday				142.40
Vacation				71.20
Vac Buy				

Taxes

Description	Amount	YTD Amount
Fed Withholdng		82.99
Fed MED/EE	4.04	79.70
Fed OASDI/EE	17.28	340.78
DE Withholdng	4.09	94.67

View Paycheck page (1 of 2)

Total:	**398.65**	**7,680.45**	**Total:**	**25.41**	**598.14**

Before-Tax Deductions

Description	Amount	YTD Amount
Medical	25.38	456.84
Dental	7.79	140.22
Vision	4.00	72.00
401(k)	10.68	202.34
Health FSA	37.74	679.28
Dep FSA	45.29	814.93
Std US Pen	42.97	821.86
Vacn Buy	1.37	24.66
Total:	**175.22**	**3,212.13**

After-Tax Deductions

Description	Amount	YTD Amount
Garnishment-Tax Levy	93.31	911.19
Loan Pybck		50.00
Suppl Life	0.26	4.68
Dep AD&D	0.09	1.62
DepLife EE	0.09	1.62
Sup AD/D	0.02	0.36
STD (Low)	0.20	3.60
LTD	1.42	25.56
401(k)	24.92	472.19
ESPP Ded	3.56	67.46
Total:	**123.87**	**1,538.28**

Employer Paid Benefits

Description	Amount	YTD Amount
Medical	25.38	456.84
Dental	1.85	33.30
Vision	1.50	27.00
Basic Life	0.58	10.44
Suppl Life*	0.26	4.68
AD&D Flat	0.46	8.28
DepLife EE*	0.35	6.30
Sup AD/D*	6.90	124.20
STD (Low)	0.11	1.98
401(k)	2.67	50.59
Total:	**40.06**	**723.61**

* Taxable

Net Pay Distribution

Payment Type	Paycheck Number	Account Type	Account Number	Amount
Check	1770	Issue Check		74.15

View Paycheck page (2 of 2)

Employees use the **Paycheck Selection** link to search for a Pay Period End Date for which to display paycheck information. If they do not have any confirmed paychecks, the following message is displayed: "You do not have any confirmed Paychecks."

Paycheck Selection Page

Usage	Employees use the Paycheck Selection link on the View Paycheck page to search for a Pay Period End Date for which to display paycheck information.
Object Name	PY_IC_PI_LIST
Navigation	Click on the Paycheck Selection link on the View Paycheck page.


View Paycheck

Global Business Institute

Pay Check Selection	
Pay Period End Date	Net Pay
2000-04-30	74.15
2000-04-23	74.16
2000-04-16	109.53
2000-04-09	74.15
2000-04-02	57.96
2000-03-26	74.16
2000-03-19	74.16
2000-03-12	74.17
2000-03-05	95.57
2000-02-27	32.13
2000-02-20	201.64
2000-02-13	167.46
2000-02-06	235.51
2000-01-30	173.30
2000-01-23	345.78
2000-01-16	167.47
2000-01-09	117.47
2000-01-02	182.97
1999-12-26	205.20
1999-12-19	149.02
1999-12-12	185.56
1999-12-05	143.68

Paycheck Selection page

Click on the **Pay Period End Date** you want to display the paycheck data for that pay period.

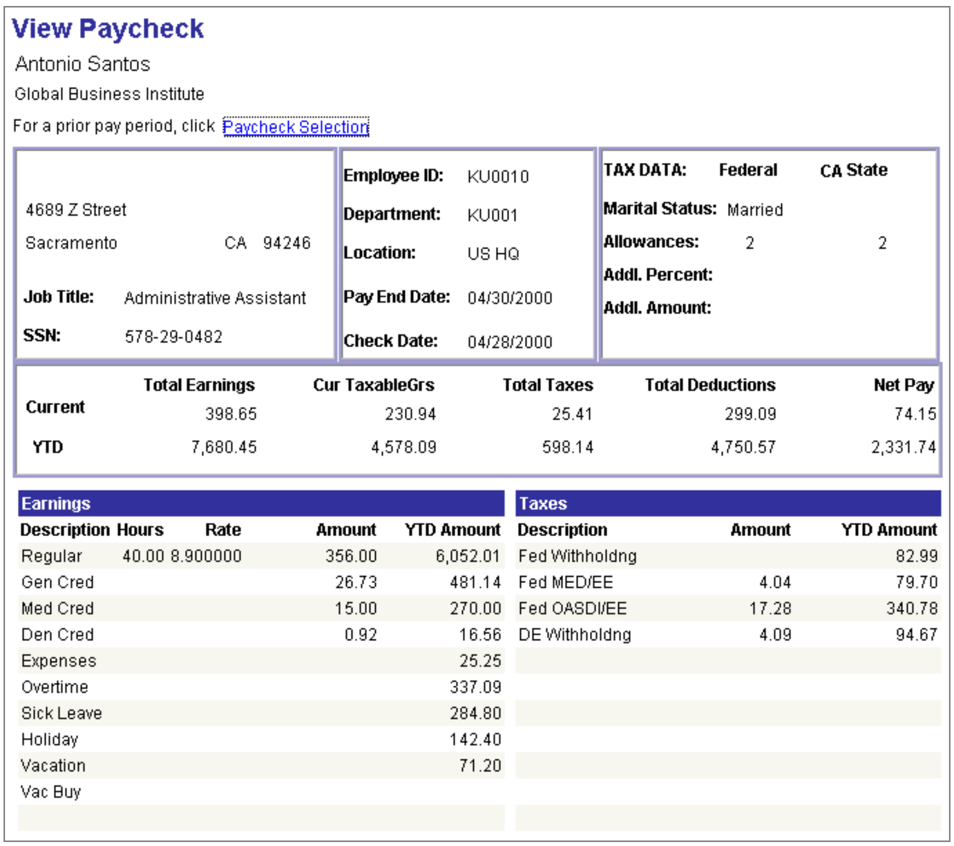
Using 3rd Party Pay Inquiry

The 3rd Party Pay Inquiry page is for the use of PeopleSoft Payroll Interface customers only.

Employees can easily view paycheck information for any confirmed pay period.

3rd Party Pay Inquiry Page

Usage	Use the 3rd Party Pay Inquiry page to review paycheck information for earnings, taxes, deductions, and net pay distribution. The View Paycheck page provides information on confirmed checks and direct deposits, but excludes reversed checks. If employees are not paid through PeopleSoft Payroll for North America, they cannot view net pay distribution. Paycheck Information is shown at the current and year-to-date level for the most recent paycheck received.
Object Name	PY_IC_PI_DATA
Navigation	**Self Service, Employee, View, 3rd Party Pay Inquiry**
Access Requirements	Data from the employee's most recent paycheck will be displayed. To view data from a previous paycheck, click the Paycheck Selection link.



View Paycheck

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Global Business Institute

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4689 Z Street

Sacramento CA 94246

Job Title: Administrative Assistant

SSN: 578-29-0482

Employee ID: KU0010

Department: KU001

Location: US HQ

Pay End Date: 04/30/2000

Check Date: 04/28/2000

TAX DATA:	Federal	CA State
Marital Status:	Married	
Allowances:	2	2
Addl. Percent:		
Addl. Amount:		

	Total Earnings	Cur TaxableGrs	Total Taxes	Total Deductions	Net Pay
Current	398.65	230.94	25.41	299.09	74.15
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3rd Party Pay Inquiry page (1 of 2)

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Description	Amount	YTD Amount
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Sup AD/D*	6.90	124.20
STD (Low)	0.11	1.98
401(k)	2.67	50.59
* Taxable		
Total:	**40.06**	**723.61**

Net Pay Distribution

Payment Type	Paycheck Number	Account Type	Account Number	Amount
Check	1770	Issue Check		74.15

3rd Party Pay Inquiry page (2 of 2)

Employees use the **Paycheck Selection** link to search for a Pay Period End Date for which to display paycheck information. If they do not have any confirmed paychecks, the following message is displayed: "You do not have any confirmed Paychecks."

Paycheck Selection Page

Usage	Employees use the Paycheck Selection link on the 3rd Party Pay Inquiry page to search for a Pay Period End Date for which to display paycheck information.
Object Name	PY_IC_PI_LIST
Navigation	Click on the Paycheck Selection link on the 3rd Party Pay Inquiry page.

View Paycheck

Global Business Institute

Pay Check Selection

Pay Period End Date	Net Pay
2000-04-30	74.15
2000-04-23	74.16
2000-04-16	109.53
2000-04-09	74.15
2000-04-02	57.96
2000-03-26	74.16
2000-03-19	74.16
2000-03-12	74.17
2000-03-05	95.57
2000-02-27	32.13
2000-02-20	201.64
2000-02-13	167.46
2000-02-06	235.51
2000-01-30	173.30
2000-01-23	345.78
2000-01-16	167.47
2000-01-09	117.47
2000-01-02	182.97
1999-12-26	205.20
1999-12-19	149.02
1999-12-12	185.56
1999-12-05	143.68

Paycheck Selection page

Click on the **Pay Period End Date** you want to display the paycheck data for that pay period.

Using Voluntary Deductions

Employees can display or change their voluntary deduction information.

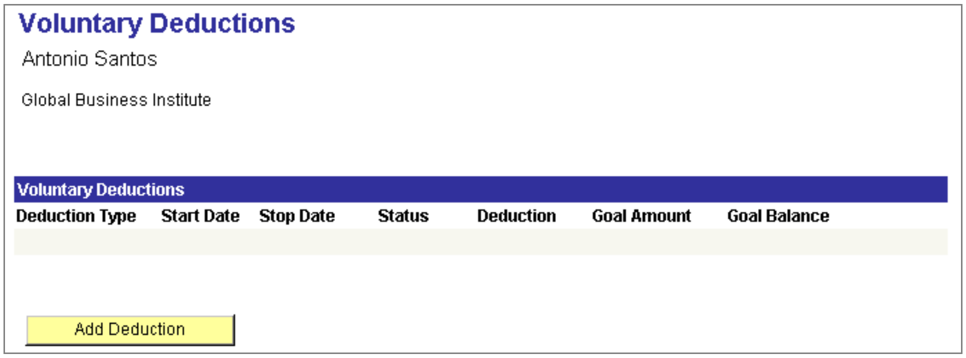
Before an employee can use the Voluntary Deductions page to add or change their voluntary deductions through a browser, the Allow Update via Emp Self Serv check box on the General Deduction Table must be selected.

For more information about how to activate voluntary deduction updates by an employee through a browser, see Defining General Deductions in your *PeopleSoft Payroll for North America* PeopleBook.

Voluntary Deductions Page

Usage	Employees use the Voluntary Deductions page to add or change their voluntary deductions.

Object Name	PY_IC_DED_LIST
Navigation	**Self Service, Employee, Task, Voluntary Deductions**



Voluntary Deductions page

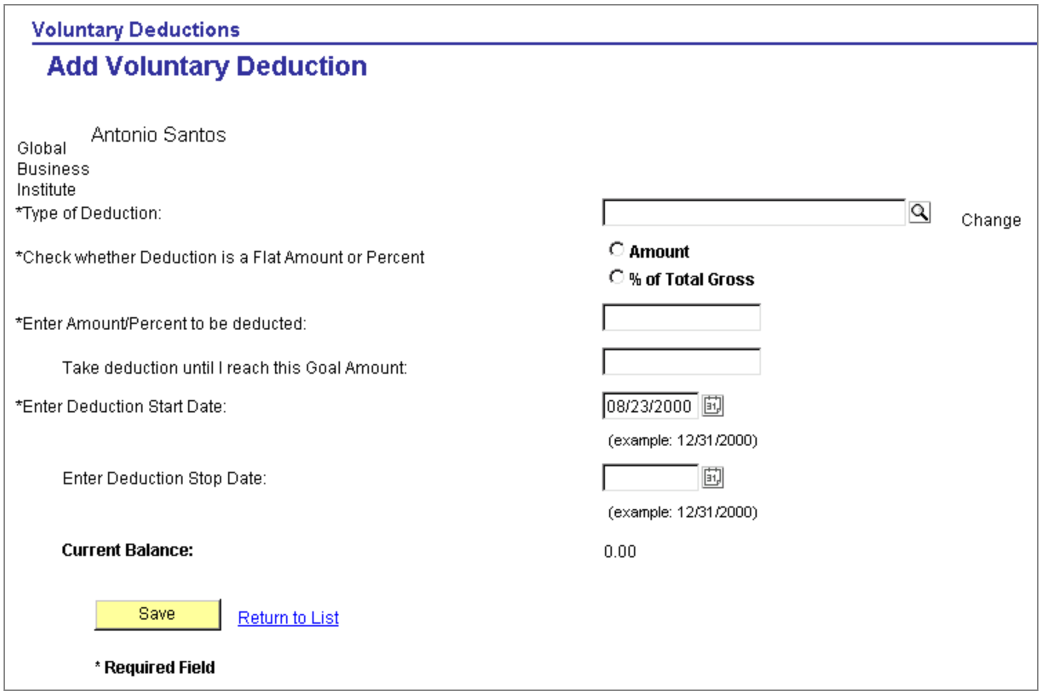
Click the **Add Deduction** button to add a deduction, or click the **Edit** button next to the deduction to change a deduction.

If you work for multiple companies, a link on the search page will allow you to search for another company.

USF If you are a U.S. Federal Government user, a link named "Change" will appear on the page. Clicking this link will access a Federal-specific page containing routing number, account number, and account type. The reason that U.S. Federal Government users use this link is that Federal employees can route each deduction separately.

Add Voluntary Deduction Page

Usage	Employees use the Add Voluntary Deduction page to add a voluntary deduction.
Object Name	PY_IC_DED_DATA
Navigation	Click the Add Deduction button on the Voluntary Deductions page.



Voluntary Deduction: Add Voluntary Deduction page

Select the **Type of Deduction** from the drop-down list box.

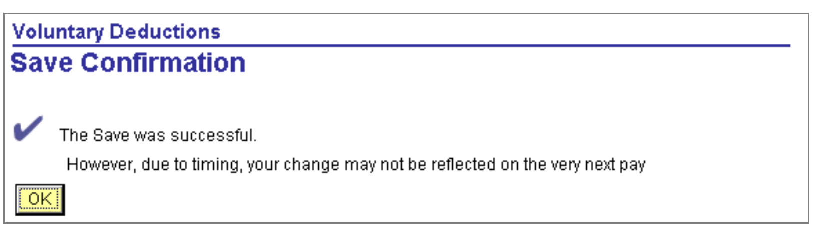
To the right of **Check whether Deduction is a Flat Amount or Percent,** select **Amount** or **% of Total Gross** (percentage of total gross) to identify the value of the deduction.

To the right of **Take deduction until I reach this Goal Amount,** enter the deduction goal amount, if any.

To the right of **Enter Deduction Start Date,** enter the date from which the deduction begins.

To the right of **Enter Deduction Stop Date,** enter the date at which the deduction ends. The deduction stop date is optional.

Click the **Save** button to add the voluntary deduction. When you do, a Save Confirmation page appears.



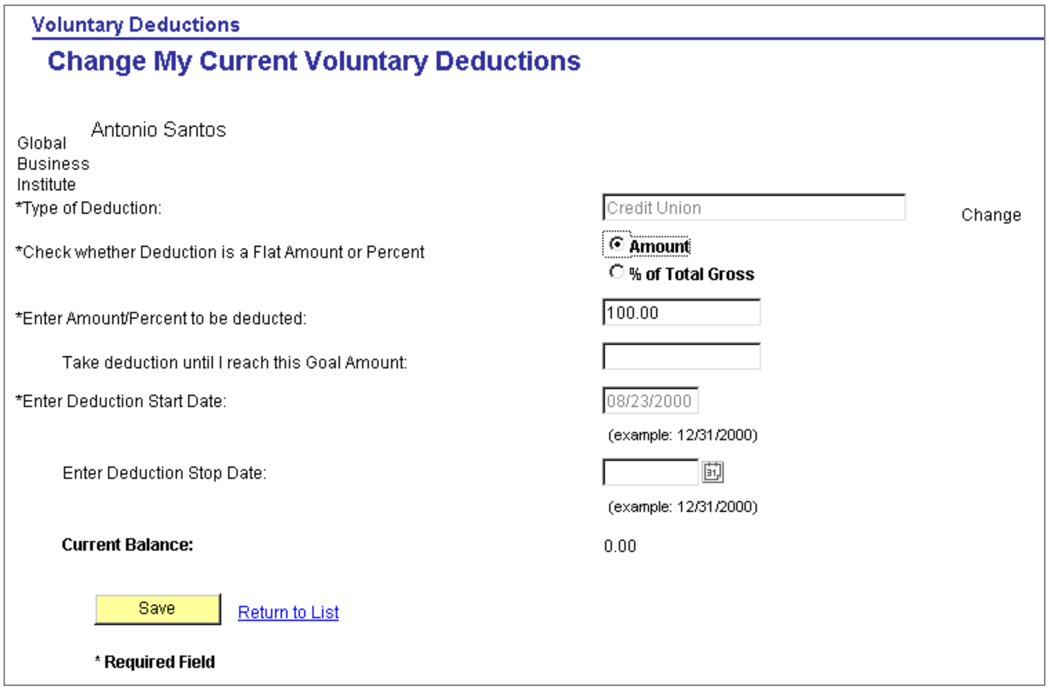
Voluntary Deductions: Save Confirmation page

Click the **OK** button to return to the Voluntary Deductions page.

Click the **Return to List** link to return to the Voluntary Deductions page.

Change Voluntary Deductions Page

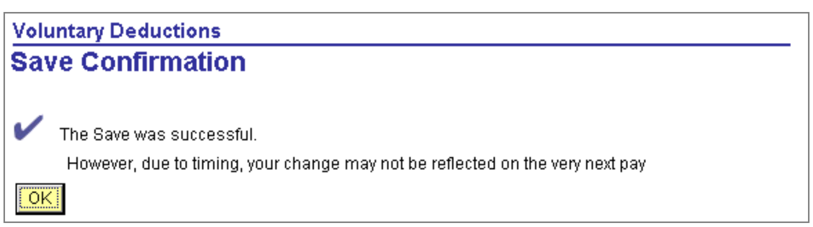
Usage	Employees use the Change Voluntary Deductions page to change a voluntary deduction.
Object Name	PY_IC_DED_DATA
Navigation	Click the Edit button on the Voluntary Deductions page.



Voluntary Deductions: Change Voluntary Deductions page

The fields in this page are identical to those in the Add Voluntary Deduction page. Select or enter any changes to the voluntary deduction.

Click the **Save** button to add a voluntary deduction. When you do, a Save Confirmation page appears.



Voluntary Deductions: Save Confirmation page

Click the **OK** button to return to the Voluntary Deductions page.

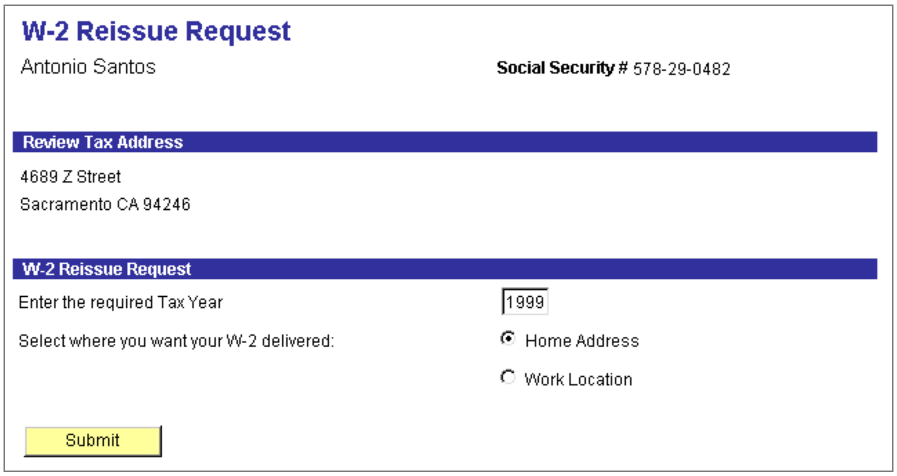
Click the **Return to List** link to return to the Voluntary Deductions page.

Using W-2 Reissue Request

Employees can request to have a new W-2 form sent to their home or office location.

W-2 Reissue Request Page

Usage	Employees use the W-2 Reissue Request page to request to have a new W-2 sent to their home or work location.
Object Name	PY_IC_W2_DATA
Navigation	**Self Service, Employee, Task, W-2 Reissue Request**



W-2 Reissue Request page

To the right of **Enter the required Tax Year,** enter the tax year, which should not be greater than the current year.

Select either **Home Address** or **Work Location** as the mailing address for your W-2 form.

To submit the update, click the **Submit** button. When you do, a Save Confirmation page appears.

W-2 Reissue Request: Save Confirmation page

Click **OK** to return to the W-2 Reissue Request page.

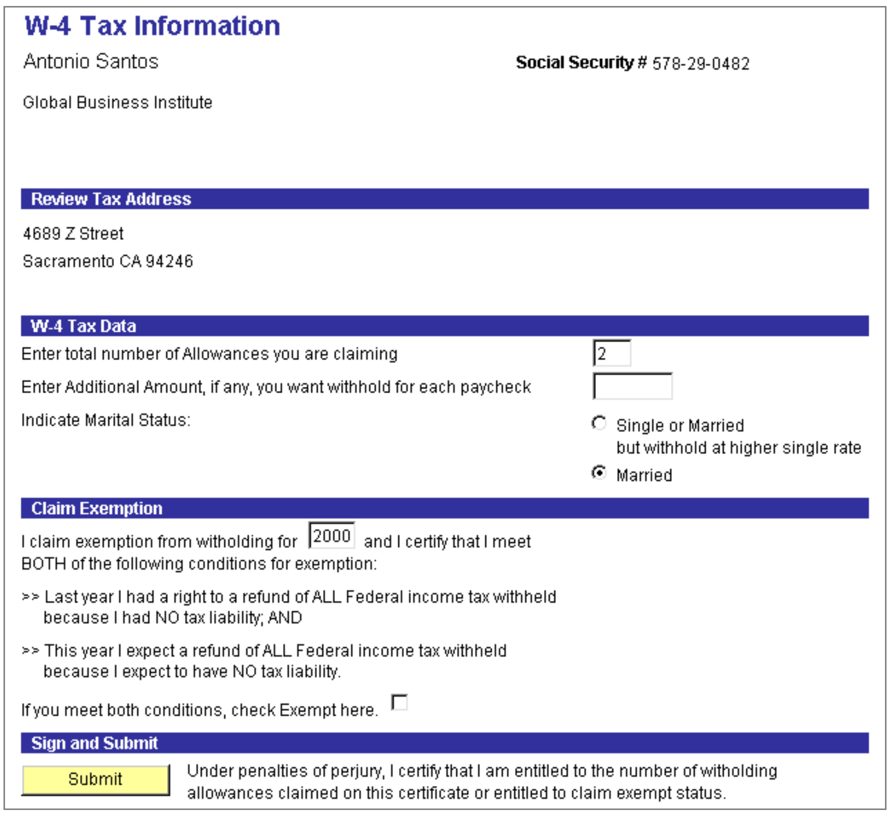
Once the page has been submitted, a workflow will be routed to the Payroll Administrator Role within your organization to indicate that this request for a duplicate W2 has been generated.

Using W-4 Tax Information

Employees can change their tax data.

W-4 Tax Information Page

Usage	Employees use the W-4 Tax Information page to change tax data. If they work for multiple companies, they select the employer for whom they want to change tax information.
Object Name	PY_IC_W4_DATA
Navigation	**Self Service, Employee, Task, W-4 Tax Information**


W-4 Tax Information

Antonio Santos

Social Security # 578-29-0482

Global Business Institute

Review Tax Address

4689 Z Street

Sacramento CA 94246

W-4 Tax Data

Enter total number of Allowances you are claiming: 2

Enter Additional Amount, if any, you want withhold for each paycheck

Indicate Marital Status:

Single or Married but withhold at higher single rate

Married

Claim Exemption

I claim exemption from witholding for 2000 and I 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, check Exempt here.

Sign and Submit

Submit

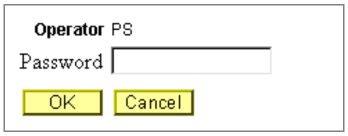
Under penalties of perjury, I certify that I am entitled to the number of witholding allowances claimed on this certificate or entitled to claim exempt status.

W-4 Tax Information page

In the **W-4 Tax Data** section of the page, you can change tax data, such as the total number of allowances you claim, or your tax marital status. Enter the total number of allowances you are claiming. Enter any additional amount you want withheld from your paycheck. Select your tax marital status.

If you work for multiple companies, a link on the search page will allow you to the search for another company.

Click the **Submit** button. When you do, a page will appear requesting you to type your login password.



W-4 Tax Information: Password Request page

Retype your login password to sign and certify your W-4 tax data. When you do, a Save Confirmation page appears.

W-4 Tax Information: Save Confirmation page

Click **OK** to return to the W-4 Tax Information page.

Index