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PeopleSoft

PeopleSoft HCM 9.2: ePay

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Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

PeopleSoft Hosted Online Help

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Online Help website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted online help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Online Help website is available in English only.

Note: Only the most current release of hosted online help is updated regularly. After a new release is posted, previous releases remain available but are no longer updated.

Locally Installed Help

If you are setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the Hosted Online Help website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Elasticsearch for full-text searching. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Elasticsearch, see the documentation for your chosen search engine.

Note: See Oracle Support Document 2205540.2 (PeopleTools Elasticsearch Home Page) for more information on using Elasticsearch with PeopleSoft.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search field. For instructions, go to your locally installed PeopleSoft Online Help site and select About This Help >Managing Locally Installed PeopleSoft Online Help >Enabling the Search Button and Field in the Contents sidebar.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	***Description***
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 the W key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.

Typographical Convention	*Description*
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.
- PeopleSoft Online Help accessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

Related Links for PeopleSoft HCM

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

Contact Us

Send your suggestions to PSOFT-INFODEV_US@ORACLE.COM. Please include release numbers for the PeopleTools and applications that you are using.

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Chapter 1

Getting Started with ePay

ePay Overview

ePay interfaces with Global Payroll, Payroll for North America, and Payroll Interface to enable workers to review and in some cases update payroll information through self-service transactions.

This table lists the ePay transactions provided for each payroll application:

Payroll Interface	***Payroll for North America***	***Global Payroll***
3rd Party Pay Inquiry	View Paycheck	View Payslip
Direct Deposit	Direct Deposit	(GBR) View Payslip GBR
W-4 Tax Information	W-4 Tax Information	Personal Bank Accounts
W-2 Reissue Request	W-2 Reissue Request	Pay Distribution Instructions
Voluntary Deductions	View Year-End Forms	(JPN) Year-End Adjustment Data
	Voluntary Deductions	

ePay Business Processes

ePay provides, and we discuss, the following business processes in this product documentation:

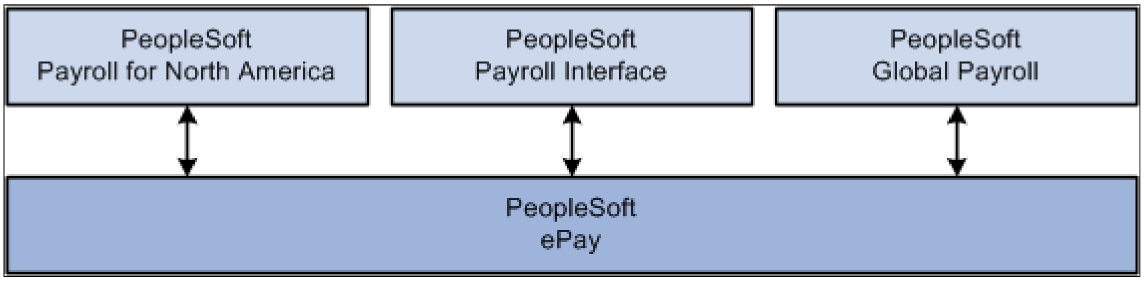
- Understanding ePay Transactions for Payroll Interface
- Understanding ePay Transactions for Payroll for North America
- Understanding ePay Transactions for Global Payroll.
- (JPN) Reviewing and Updating YEA Data

ePay Integrations

PeopleSoft Payroll for North America, PeopleSoft Payroll Interface, and PeopleSoft Global Payroll all exchange information with PeopleSoft ePay. The following diagram shows the integration between ePay and other PeopleSoft applications:

Image: ePay Integration Flow with Other PeopleSoft Applications

The following graphic shows that PeopleSoft ePay integrates with PeopleSoft Payroll for North America, PeopleSoft Payroll Interface, and PeopleSoft Global Payroll.



We discuss integration considerations in the implementation topics of this product documentation.

ePay Navigation

The standard menu driven navigation path through Self Service > Payroll and Compensation is the traditional PeopleSoft access method. Menu navigation is used throughout this topic to describe how to access a page.

ePay Roles and Security

User roles determine default access to transactions. Set up user roles on the Roles page in the User Profiles component (USERMAINT). Profiles are linked to permission lists. Permission lists identify the pages that users can access. To modify access to specific web pages for each role, modify the permission list. User profiles also control the data that each employee can access.

Related Links

"Understanding PeopleSoft Security" (PeopleSoft HCM 9.2: Application Fundamentals)

ePay Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding product documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps.

Refer to the *PeopleSoft HCM 9.2 - Reorganization of Component Interface Permissions* (Doc ID 2342162.1) MOS posting for a list of system-delivered CIs and their usage, the mapping of CIs and associated permission lists, and the mapping of CI permission lists and user roles.

See:

- Application Fundamentals
- *PeopleTools: Setup Manager*

Chapter 2

Managing Pay Information for Payroll Interface

Understanding ePay Transactions for Payroll Interface

These ePay transactions are relevant to organizations that use PeopleSoft Payroll Interface:

- Direct Deposit (PY_IC_DIR_DEP).

  Employees can view, add, change, or discontinue direct deposit instructions.

- 3rd Party Pay Inquiry (PI_IC_CHK_RVW).

  Employees can review paycheck information for earnings, taxes, deductions, and net pay distribution.

- W-2 Reissue Request (PY_IC_W2).

  Employees can request a duplicate W-2 to be sent to either their work or home addresses.

- W-4 Tax Information (PY_IC_W4).

  Employees can enter or update tax withholding information. Workflow sends an email notification to the employee verifying the W-4 details.

  Note: The W-4 Tax Information self-service transaction does not work when WWW_AUTHENTICATION is used. With WWW_AUTHENTICATION, the user receives a message at the final confirmation page that their password is invalid and is unable to save the W-4 changes. To use the W-4 Tax Information self-service transaction, you must use a different authentication method.

- Voluntary Deductions (PY_IC_VOL_DEDS).

  Employees add, change, or stop (delete) voluntary deductions.

Managing and Viewing Payroll Information

This topic lists the pages used to manage and view payroll information.

Pages Used to Manage and View Payroll Information

Page Name	***Definition Name***	***Usage***
Direct Deposit Page	PY_IC_DD_LIST	View current direct deposit information.

Page Name	***Definition Name***	***Usage***
Add Direct Deposit Page Change Direct Deposit Page	PY_IC_DD_DATA	Add or change direct deposit information. If the bank is in the United States, indicate whether funds are actually going to a non-US bank.
Delete Confirmation Page	EO_DEL_CONFIRM	Delete direct deposit information.
Pay Statement Print Option Page	PY_IC_DD_SUPP	Employees indicate whether they want a printed copy of the pay statement mailed to their home address. The default is set to yes.
(USA) W-4 Tax Information Page	PY_IC_W4_DATA	Change tax data. If you work for multiple companies, select the employer for whom you want to change tax information. Workflow associated with this page sends an email notification to the employee verifying the W-4 details. The W-4 Tax Information self-service transaction does not work when WWW_AUTHENTICATION is used. With WWW_AUTHENTICATION, users receive a message on the final confirmation page that their password is invalid and are unable to save the W-4 changes. To use the W-4 Tax Information self-service transaction, you must use a different authentication method.
Pay Inquiry Page	PI_IC_CHK_DATA	For Payroll Interface users only, employees view paycheck information for any confirmed pay period.
(USA) W-2 Reissue Request Page	PY_IC_W2_DATA	Employees request to have a new W-2 form sent to their home or work address. Workflow associated with this page generates an email confirmation to the employee.
Voluntary Deductions Page	PY_IC_DED_LIST	View a list of current voluntary deductions.
Add Voluntary Deduction Page Change Voluntary Deduction Page	PY_IC_DED_DATA	Add, change, or stop voluntary deductions.
(USF) Add Distribution Information Page	W3_GVT_PY_ALOT_IC	Enter details of the account from which the voluntary deduction is taken.

Chapter 3

Managing Pay Information for Payroll for North America

Understanding ePay Transactions for Payroll for North America

These ePay transactions are relevant to organizations that use PeopleSoft Payroll for North America:

- View Paycheck (PY_IC_PAY_INQ).

  Employees review paycheck information for earnings, taxes, deductions, and net pay distribution. See Setting Up and Viewing Self-Service Paychecks and Using the PeopleSoft Fluid User Interface to View Paychecks.

- Paycheck Modeler USA (PY_MOD_SS_MODELER)

  Employees can simulate a paycheck online to answer their own *what if* scenarios. See Setting Up Paycheck Modeling and Using the PeopleSoft Fluid User Interface to Manage Additional Payroll Information.

- W-4 Tax Information (PY_IC_W4).

  Employees enter or update tax withholding information. Workflow sends an email notification to the employee verifying the W-4 details. See Setting Up Updateable PDF Tax Forms and Using the PeopleSoft Fluid User Interface to Update PDF Tax Forms.

- Year End Form Consent (PY_SS_YE_CONS_USA) and (PY_SS_YE_CONS_CAN).

  Employees grant or withdraw consent to receive year-end forms or slips electronically rather than on paper. Workflow sends email confirmation of changes in consent status. See Managing Consent for Electronic Year-End Forms, (USA) Using the PeopleSoft Fluid User Interface to Manage Consent and View Electronic Year-End Forms and (CAN) Using the PeopleSoft Fluid User Interface to Manage Consent for Electronic Year-End Forms.

- Year End Forms (PY_SS_YE_FORM_USA) and (PY_SS_YE_FORM_CAN).

  Employees view and print year-end forms or slips. Workflow notifies employees by email when the forms are ready for viewing. See Viewing Year-End Forms, (USA) Using the PeopleSoft Fluid User Interface to Manage Consent and View Electronic Year-End Forms and (CAN) Using the PeopleSoft Fluid User Interface to Manage Consent for Electronic Year-End Forms.

- Direct Deposit (PY_IC_DIR_DEP).

  Employees display, add, change, or discontinue direct deposit instructions. See Setting Up and Viewing Direct Deposit and Using the PeopleSoft Fluid User Interface to Add and Modify Direct Deposit Accounts.

- Voluntary Deductions (PY_IC_VOL_DEDS).

Employees add, change, or stop (delete) voluntary deductions. See Viewing and Updating Voluntary Deductions and Using the PeopleSoft Fluid User Interface to Manage Additional Payroll Information.

- Pay Inquiry (PI_IC_CHK_DATA).

  (Payroll Interface users only) Employees can view paycheck information for any confirmed pay period. See Using the PeopleSoft Fluid User Interface to Manage Additional Payroll Information.

- W-2 Reissue Request (PY_IC_W2).

  Employees request a duplicate W-2 to be sent to either their work or home addresses. See (USA) Managing W-4 and W-2 Reissue.

Using the PeopleSoft Fluid User Interface to Perform Payroll Tasks as an Employee

This topic lists the pages that employees can access from a single location in the PeopleSoft Fluid User Interface to perform payroll transactions.

For general information about fluid pages in PeopleSoft HCM, see "Understanding PeopleSoft Fluid User Interface Home Pages" (PeopleSoft HCM 9.2: Application Fundamentals).

Pages Used to Perform Payroll Tasks as an Employee in Fluid

Page Name	***Definition Name***	***Usage***
Payroll Tile	HC_PY_SS_NAVCOLL_FL (cref for the tile) PY_IC_WH_PTILE_FLU (page for dynamic data)	Access a collection of self-service payroll transactions.

Payroll Tile

Use the Payroll tile to access a collection of self-service payroll transactions.

Navigation

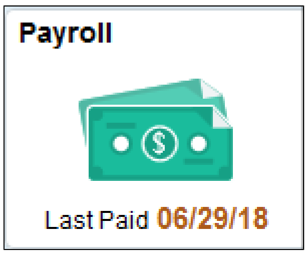
The Payroll tile is delivered as part of the "Employee Self-Service Home Page" (PeopleSoft HCM 9.2: Application Fundamentals), but the location can change if you add it to your personalized home pages.

Image: (Desktop) Payroll tile

This example illustrates the Payroll tile for the desktop.

Image: (Smartphone) Payroll tile

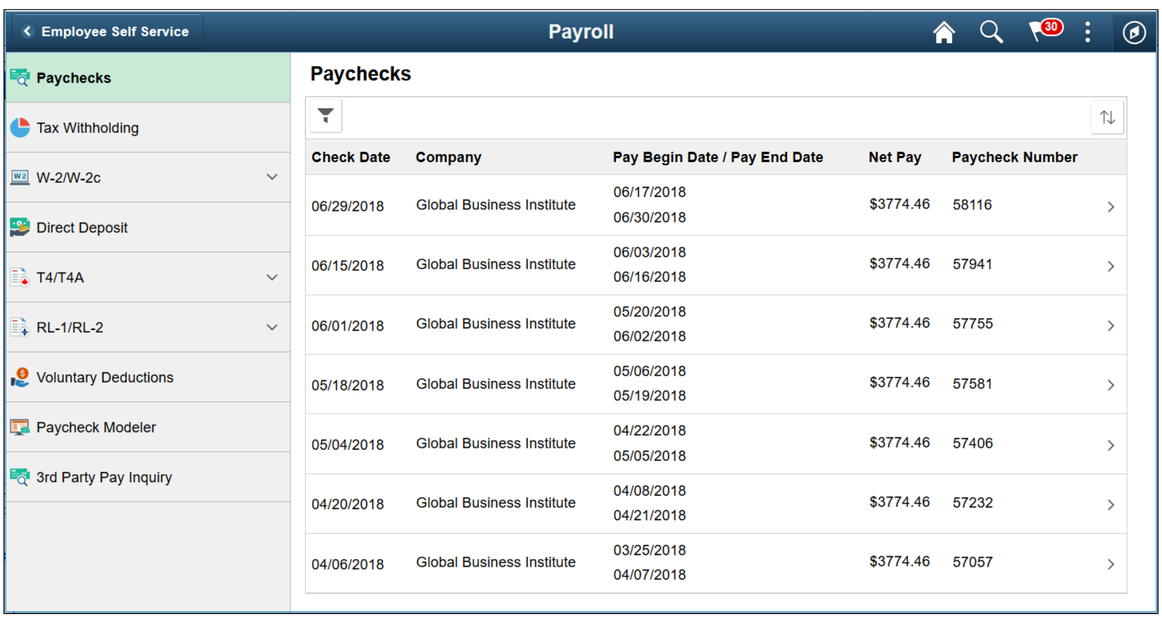
This example illustrates the Payroll tile for the smartphone.



Click the Payroll tile to access a collection of frequently-used payroll transactions from one location.

Image: Payroll application start page

This example illustrates the Payroll application start page.



This application start page is navigation collection that lists the transactions collected under these categories:

- Paychecks

See Using the PeopleSoft Fluid User Interface to View Paychecks.

- Tax Withholding

  See Using the PeopleSoft Fluid User Interface to Update PDF Tax Forms.

- W-2/W-2c

  See (USA) Using the PeopleSoft Fluid User Interface to Manage Consent and View Electronic Year-End Forms.

- Direct Deposit

  See Using the PeopleSoft Fluid User Interface to Add and Modify Direct Deposit Accounts.

- T4/T4A

  See (CAN) Using the PeopleSoft Fluid User Interface to Manage Consent for Electronic Year-End Forms.

- RL-1/RL-2

  See (CAN) Using the PeopleSoft Fluid User Interface to Manage Consent for Electronic Year-End Forms.

- Voluntary Deductions

  See Using the PeopleSoft Fluid User Interface to Manage Additional Payroll Information.

- Paycheck Modeler

  See Using the PeopleSoft Fluid User Interface to Manage Additional Payroll Information.

- 3rd Party Pay Inquiry

  See Using the PeopleSoft Fluid User Interface to Manage Additional Payroll Information.

Setting Up and Viewing Self-Service Paychecks

Pages Used to View Self-Service Paychecks

This table lists only classic pages. For information on Fluid pages, see Using the PeopleSoft Fluid User Interface to View Paychecks.

Page Name	***Definition Name***	***Usage***
View Paycheck Page (summary)	PY_IC_PI_LIST	View a list of paychecks by check date (most recent first). Depending on setup options, the page can list PDF paychecks and historical checks that are not in PDF format. By selecting the check date link, employees access PDF paychecks in a new window and view historical paychecks on the View Paycheck page. See *Using the PeopleSoft Fluid User Interface to View Paychecks,* Paychecks Page.
View Paycheck Page (detail)	PY_IC_PI_DATA	View details for a paycheck that is not available to view as a PDF. View paycheck details in accessibility mode even if the paycheck would otherwise be available in PDF format.
"View Self Service Paycheck Page" (PeopleSoft HCM 9.2: Payroll for North America) View Self Service Paycheque Page	PY_SSP_ADMIN_VIEW PY_SSP_VIEW_DATA	View paychecks for US employees and paycheques for Canadian employees to resolve questions raised by employees. Clicking a date when a PDF is available opens the PDF file in a new window. If no PDF is available, the information appears on a PeopleSoft page. Administrators can view all available paychecks, regardless of the availability date specified for employee viewing of PDF files.

Understanding the View Paycheck Transaction

To display self-service paychecks in PDF, you must use the Oracle Business Intelligence Publisher (BI Publisher, or BIP) PDF creation method of printing paychecks and direct deposit advice forms. To use the BI Publisher PDF creation processes, you must update the "Paycheck Options Table Page" (PeopleSoft HCM 9.2: Payroll for North America) (PY_SSP_SETUP_OPTN) in Payroll for North America to set up the options for displaying self-service paychecks in PDF. Options that you specify include:

- The URL for the XML data to display self-service checks.
- Whether to display only PDF checks.
- Whether to display manual checks with a $0 or negative net amount in self-service.
- The number of days from the check date that the paychecks should be available in self-service.

See *PeopleTools: BI Publisher for PeopleSoft*

Paycheck Availability

Use the Paycheck Availability fields on the Paycheck Options Table Page (PY_SSP_SETUP_OPTN) to control the default timing of when paychecks should be available for viewing in the ePay self-service View Paycheck transaction. You can indicate whether paychecks should be available on the check date or specify the number of days before or after the check date.

Note: Paycheck Availability fields apply to all confirmed checks and advices, whether or not they are created with BI Publisher.

You can specify paycheck availability differently for various company and pay group combinations.

Note: The paycheck data from the current pay run is visible to employes in self service as soon as you run pay confirmation. Running the BI Publisher PDF creation process uses the Paycheck Availability fields on the "Paycheck Options Table Page" (PeopleSoft HCM 9.2: Payroll for North America) for the PDF paycheck to determine when the PDF check is viewable in self service. For this reason, Oracle recommends that you run the BI Publisher PDF creation process immediately after confirming the payroll. If you are not using the BI Publisher PDF creation process, you can still define the Paycheck Availability fields on the Paycheck Options Table page to determine when the check will be viewable in self service for non-PDF wage statements. .
For PDF paychecks, the Days From Check Date on the Create PDF Paychecks run control overrides the values in the Paycheck Availability field on the Paycheck Options Table page.

Self-Service Paychecks for Accessibility Users

In accessible mode, the system always displays checks on a PeopleSoft page (and not in a PDF file) regardless of your PDF settings.

Self-Service Paycheck and Advice Templates

Payroll for North America delivers RTF templates for displaying the paychecks and advice forms as PDF documents in the self-service transaction. You can modify the templates if required.

Related Links

"Setting Up to Print and View Paychecks and Year-End Pay Forms with BI Publisher (BIP)" (PeopleSoft HCM 9.2: Payroll for North America)

Prerequisites

Before you can display PDF self-service paychecks, you must complete these setup steps:

- Configure Integration Broker and Report Manager.
- Update the BI Publisher form definitions with specifics for your implementation.
- Specify BI Publisher printing and self-service options.
- Complete payroll processing and run the PYCHKUSA, PYCHQCAN, PYDDAUSA, or PYDDACAN PSJob processes to create self-service checks and advices.

See *PeopleTools: Integration Broker* and *PeopleTools: Process Scheduler* product documentation.

Related Links

"Setting Up to Print and View Paychecks and Year-End Pay Forms with BI Publisher (BIP)" (PeopleSoft HCM 9.2: Payroll for North America)

"Printing Paychecks and Direct Deposit Advices" (PeopleSoft HCM 9.2: Payroll for North America)

Using the PeopleSoft Fluid User Interface to View Paychecks

This topic discusses how employees use the PeopleSoft Fluid User Interface to view PeopleSoft Payroll for North America (USA and CAN) paychecks.

For general information about Fluid pages in PeopleSoft HCM, see "Understanding PeopleSoft Fluid User Interface Home Pages" (PeopleSoft HCM 9.2: Application Fundamentals) in your PeopleSoft HCM Application Fundamentals product documentation.

To understand how employees view paychecks on a mobile device, consider watching this VFO:

PeopleSoft Mobile Paycheck

Pages Used to View Paychecks Using the PeopleSoft Fluid User Interface

Page/Tile Name	***Definition Name***	***Usage***
Payroll Tile	HC_PY_SS_NAVCOLL_FL (cref for the Payroll tile) PY_IC_WH_PTILE_FLU (page for dynamic data)	Access a collection of self-service payroll transactions, including the option to view paychecks.
Pay Tile	HC_PY_IC_PAY_INQ_FLU (cref for the Pay tile) PY_IC_PAYTILE_FLU (page for dynamic data)	Access employee self-service, including the option to view paychecks.
Paychecks Page	PY_IC_PI_LIST_FLU	View a list of recent paychecks and access details for a selected paycheck.
Filter Page	PY_ESS_FLTRDAT_SCF	After clicking the Filter icon on the Pay page, enter new from and to dates to change the date range of paychecks to display.
Paycheck Summary Page	PY_IC_PI_PCHOM_FL PY_IC_PI_PCHOM_SCF	(Smartphone Only) (USA) View a summary of data for the selected paycheck, access paycheck data details, and access paycheck PDFs.

Page/Tile Name	Definition Name	Usage
Paycheque Summary Page	PY_IC_PI_PCHOC_FL PY_IC_PI_PCHOC_SCF	(Smartphone Only) (CAN) View a summary of data for the selected paycheque to access paycheque data details, and to access paycheque PDFs. The (CAN) Paycheque Summary page is similar to the (USA) Paycheck Summary Page.
View Paycheck Page	PY_IC_PI_DATA_SCF	(Tablet Only) View details of the selected paycheck.
Paycheck Messages Page	PY_IC_PI_PCMSG_SCF	(Smartphone only) (USA) View messages, if any, for the selected paycheck. If no messages exist for the selected paycheck, the Paycheck Messages item does not appear. **Note:** Messages are also printed on the PDF and non-PDF versions of the paycheck and direct deposit advice.
Paycheque Messages Page	PY_IC_PI_PCMSC_SCF	(Smartphone only) (CAN) View messages, if any, for the selected paycheque. If no messages exist for the selected paycheque, the Paycheque Messages item does not appear. **Note:** Messages are also printed on the PDF and non-PDF versions of the paycheque and direct deposit advice.
Earnings Page	PY_IC_PI_PCEAR_SCF	(Smartphone Only) View earnings rates, hours or units, and amounts as of the selected paycheck, including year-to-date earnings data. **Note:** For non-PDF paychecks, year-to-date data is available for the most recent paycheck only.

Page/Tile Name	***Definition Name***	***Usage***
Additional Earnings Data Page	PY_IC_PI_PCAEAR_SCF	(Smartphone only) (USA) After clicking the Additional Earnings item on the Earnings page, view the pay period begin and end dates for any earnings that are paid out for a prior or future period in the selected paycheck . Also view data for earnings that use FLSA or alternative overtime rates. Applies to selected paycheck only, not to year-to-date data. **Note:** This page is available only for employees working in states (for example, CA, CO, HI, NY) where prior or future pay begin and end dates, or FLSA and alternative overtime rates data, is required to appear on pay statements.
Taxes Page	PY_IC_PI_PCTAX_SCF	(Smartphone Only) View federal, state or provincial, and local tax details as of the selected paycheck, including year-to-date taxes data. **Note:** For non-PDF paychecks, year-to-date data is available for the most recent paycheck only.
Personal Tax Info Page	PY_IC_PI_PCPTX_SCF	(Smartphone Only) View federal, and state or provincial, withholding status.
Before-Tax Deductions Page	PY_IC_PI_PCBTA_SCF	(Smartphone Only) View before-tax deductions as of the selected paycheck, including year-to-date before-tax deductions data. **Note:** For non-PDF paychecks, year-to-date data is available for the most recent paycheck only. See an example of the Before-Tax Deduction Page shown under the Paycheck Summary Page in this topic.
After-Tax Deductions Page	PY_IC_PI_PCATA_SCF	(Smartphone Only) View after-tax deductions as of the selected paycheck, including year-to-date after-tax deductions. **Note:** For non-PDF paychecks, year-to-date data is available for the most recent paycheck only.

Page/Tile Name	***Definition Name***	***Usage***
Employer Paid Benefits Page	PY_IC_PI_PCEPB_SCF	(Smartphone Only) View employer-paid benefit amounts as of the selected check, including year-to-date employer paid benefits data. **Note:** For non-PDF paychecks, year-to-date data is available for the most recent paycheck only. **Note:** The Employer Paid Benefits row and page are available only if the Employer Paid Benefits check box is selected on the Paycheck Options Table page (PY_SSP_SETUP_OPTN). See Setting Up and Viewing Self-Service Paychecks and "Setting Up to Print and View Paychecks and Year-End Pay Forms with BI Publisher (BIP)" (PeopleSoft HCM 9.2: Payroll for North America).
Leave Balances Page	PY_IC_PI_PCLEB_SCF	(Smartphone Only) View vacation and sick leave balance amounts as of the selected paycheck. **Note:** For non-PDF paychecks, leave balance data is available for the most recent paycheck only. **Note:** The Leave Balances row and page are available only if the Leave Balances check box is selected on the Paycheck Options Table page (PY_SSP_SETUP_OPTN). See Setting Up and Viewing Self-Service Paychecks and "Setting Up to Print and View Paychecks and Year-End Pay Forms with BI Publisher (BIP)" (PeopleSoft HCM 9.2: Payroll for North America).
Net Pay Distribution Page	PY_IC_PI_PCNPD_SCF	(Smartphone Only) View the net pay distribution information for the selected paycheck, including check number and amount and, if direct deposit is set up, direct deposit advice number and amount.
Paycheck Analytics Page	PY_IC_PI_PCANA_SCF	(Smartphone Only) (USA) View data for the selected paycheck in pie chart form.

Page/Tile Name	***Definition Name***	***Usage***
Paycheque Analytics Page	PY_IC_PI_PCANC_SCF	(Smartphone Only) (CAN) View data for the selected paycheque in pie chart form. The (CAN) Paycheque Summary page is similar to the (USA) Paycheck Analytics Page.

Pay Tile

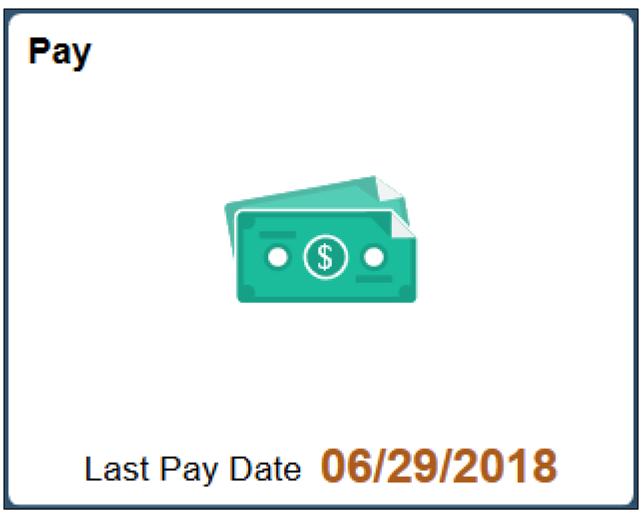
Use the Pay tile to access paycheck information.

Navigation

The Pay tile is not available on any delivered home page by default, but it can be manually added to a personalized or delivered home page from the Actions List.

Image: Pay tile

This example illustrates the Pay tile.



Note: Both Payroll and Pay tiles provide access to the page for viewing paychecks. The Payroll Tile, which requires PeopleTools 8.55 or above, also supports additional payroll self-service transactions for employees, such as updating tax withholding forms, managing consent for electronic delivery of W-2 and W-2c forms, T4/T4A forms, and RL-1/RL-2 forms, managing direct deposit information, and so on.

Click the Pay tile to access the Paychecks page, which displays summary information about the employee's most recent paychecks.

Last Pay Date or **Last Paid**	Displays the date of the employee's most recent paycheck.

Paychecks Page

Use the Paychecks page (PY_IC_PI_LIST_FLU) to view a list of recent paychecks and to click a paycheck row to access data about the selected paycheck.

Note: The Paychecks page in Fluid is equivalent to the PeopleSoft classic Pay page (Self Service >Payroll and Compensation >Pay).

Navigation

Click the Payroll or Pay tile on the Employee Self Service home page.

Image: (Tablet) Paychecks page

This example illustrates the Paychecks page on a tablet.

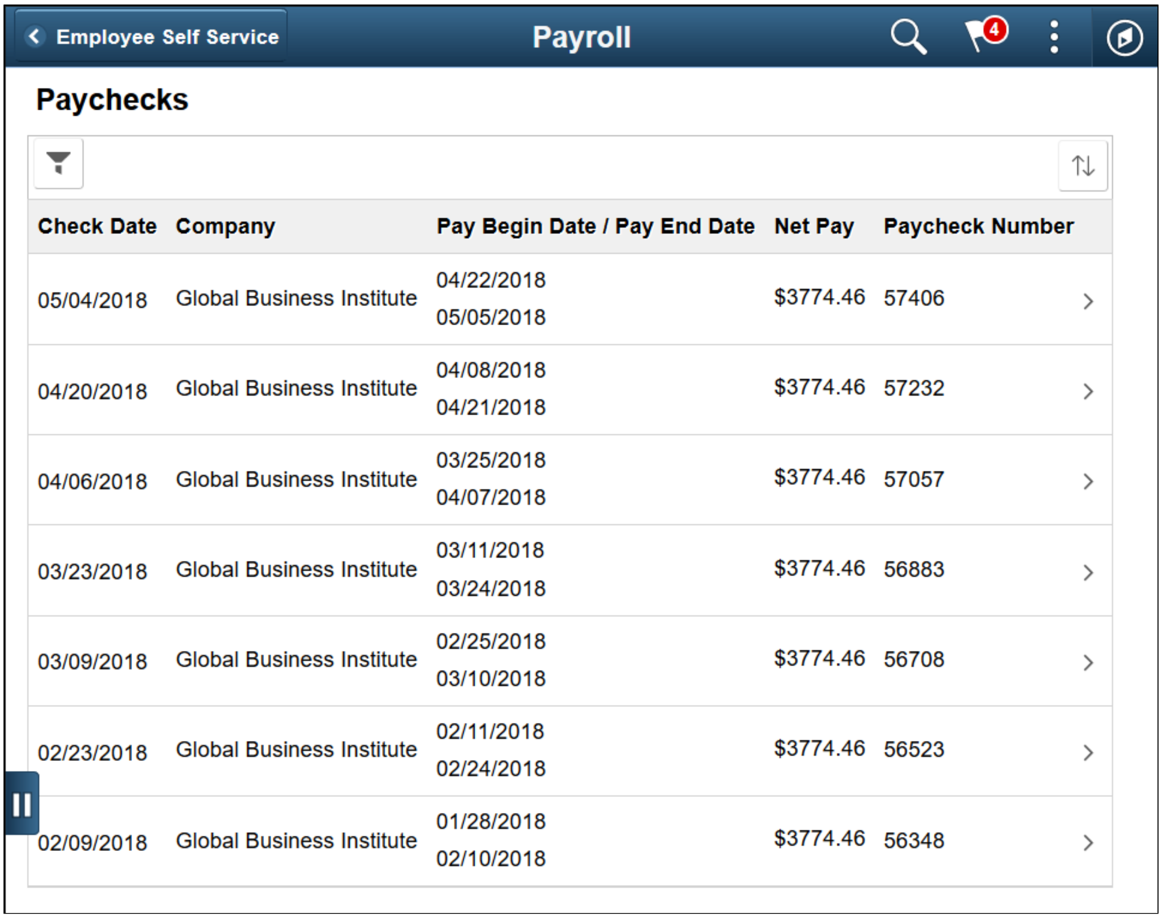
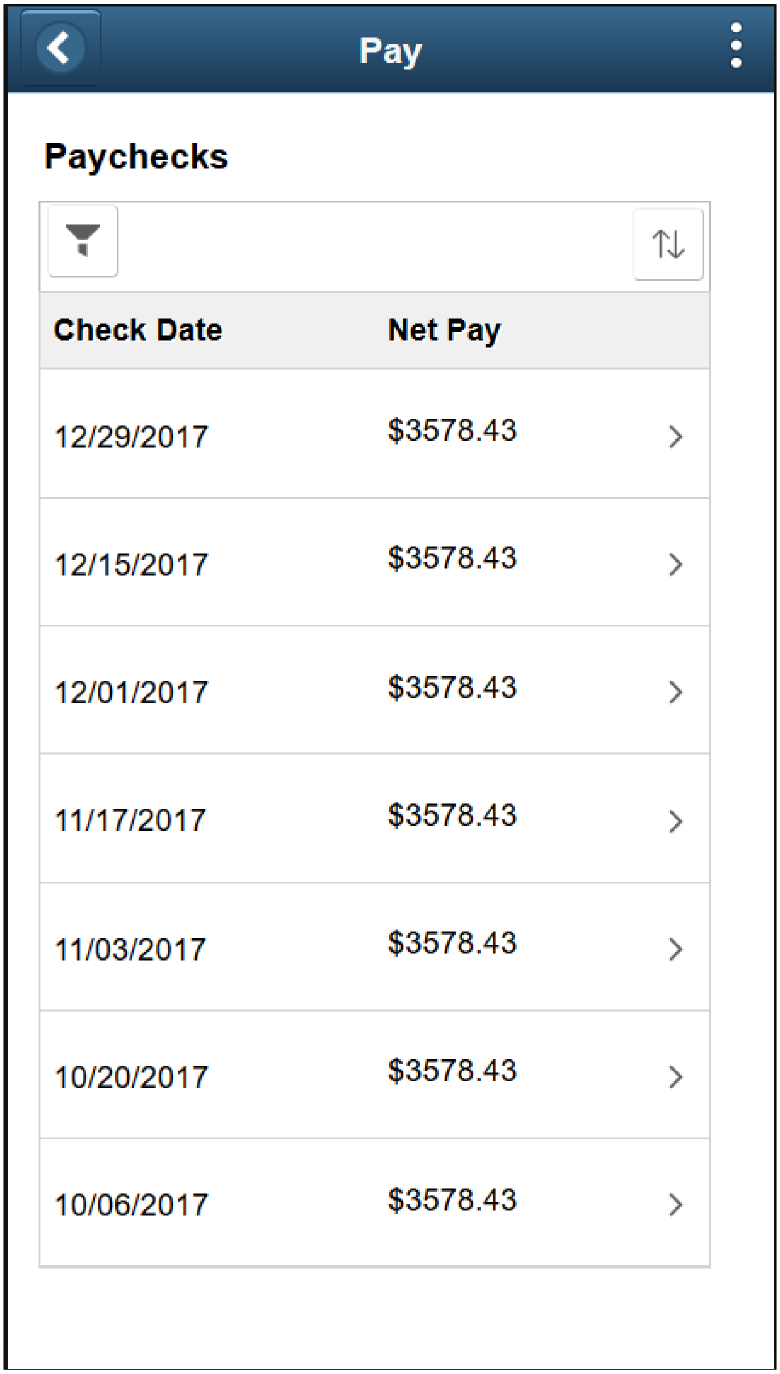
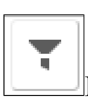


Image: (Smartphone) Paychecks page

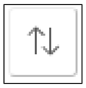
This example illustrates the Pay page on a smartphone.



Paychecks

**Filter**

To change the date range of paychecks to display, click the filter icon and enter new from and to dates, and then click the Done button. The system displays checks where the pay period end date falls within the selected range.

 **Grid Sort**

Initially, paychecks are sorted chronologically, with the most recent paycheck first and paychecks for the last three months. To change the sort order, click the grid sort icon and choose a new sort option. You can sort by any field that is shown in the grid.

<paycheck row>

Click a paycheck row to access more data about the selected paycheck.

On a tablet, click a paycheck row to view the paycheck PDF if available, or view the View Paycheck Page if paycheck PDFs are not available.

On a smartphone, click a paycheck row to access the (USA) Paycheck Summary Page or (CAN) Paycheque Summary page. If a paycheck PDF is available for review, click the View PDF Paycheck link on the Paycheck Summary page to view it.

PDF and non-PDF paycheck availability is set on the "Paycheck Options Table Page" (PeopleSoft HCM 9.2: Payroll for North America).

See Setting Up and Viewing Self-Service Paychecks and "Setting Up to Print and View Paychecks and Year-End Pay Forms with BI Publisher (BIP)" (PeopleSoft HCM 9.2: Payroll for North America).

Paycheck Summary Page

(Smartphone Only) Use the (USA) Paycheck Summary (PY_IC_PI_PCHOM_FL or PY_IC_PI_PCHOM_SCF) or (CAN) Paycheque Summary page (PY_IC_PI_PCHOC_FL or PY_IC_PI_PCHOC_SCF) to view a summary of data for the selected paycheck, to access paycheck data details, and to access paycheck PDFs.

Navigation

Click a paycheck row on the Pay page.

Image: (Smartphone) Paycheck Summary Page (1 of 2)

This example illustrates the Paycheck Summary page on a smartphone (1 of 2).

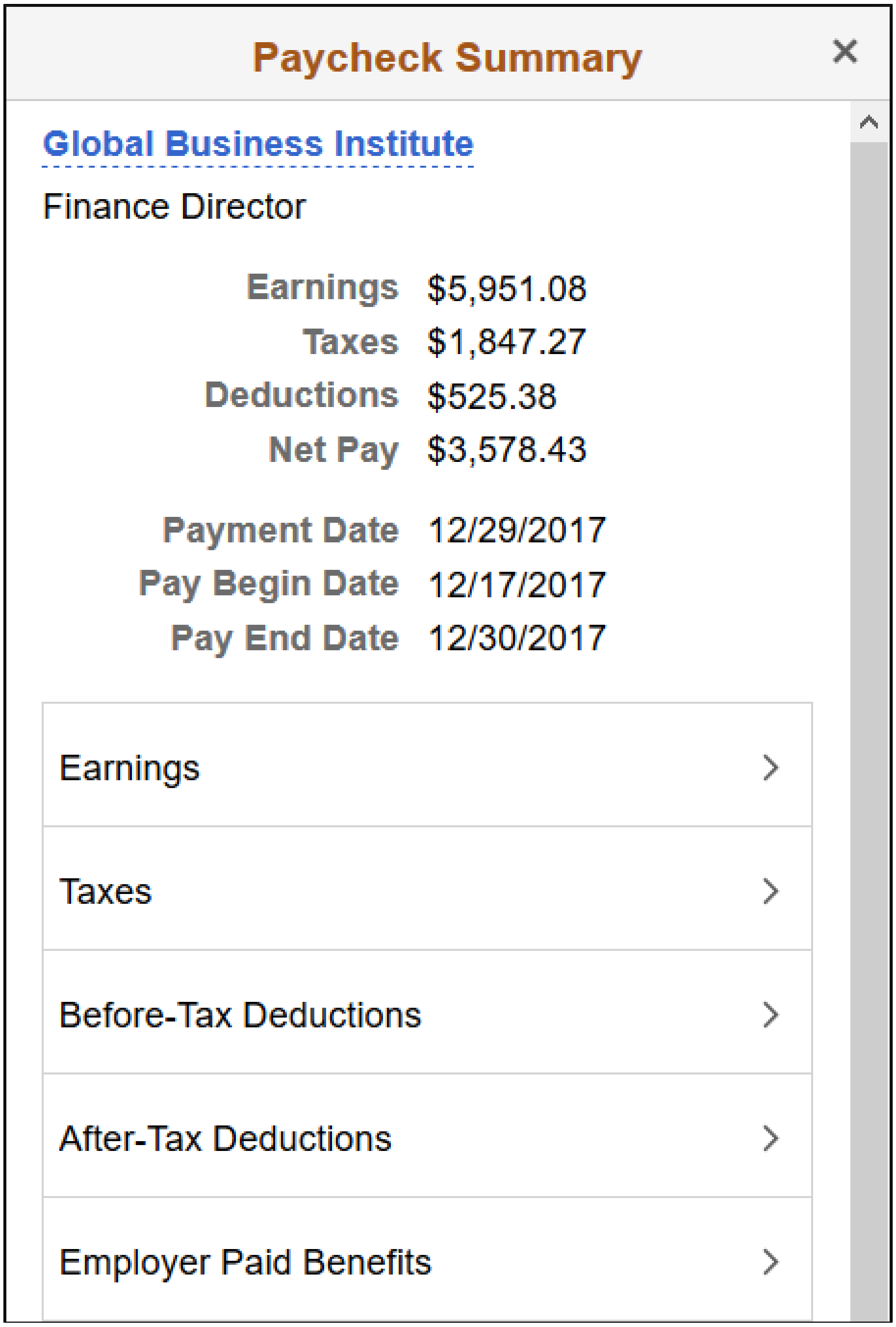
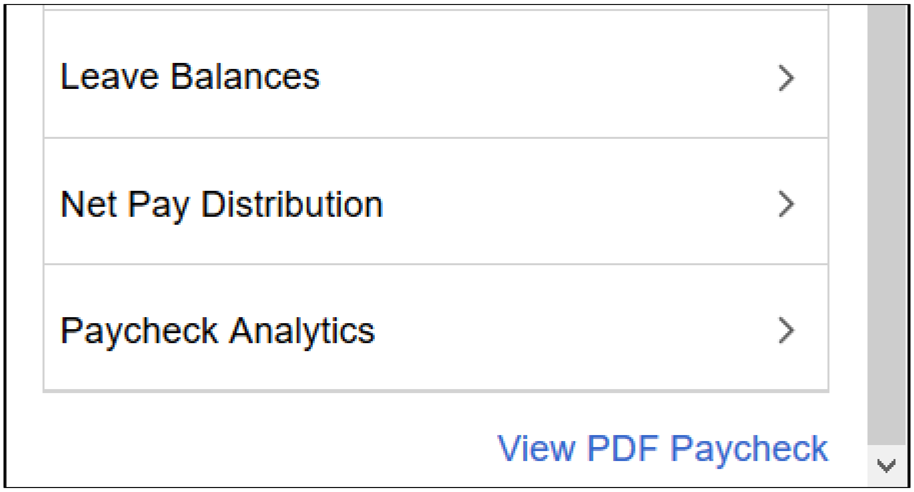


Image: (Smartphone) Paycheck Summary Page (2 of 2)

This example illustrates the Paycheck Summary page on a smartphone (2 of 2).



Accessing Smartphone Detail Pages

Click any row on the Paycheck Summary page to access the detail page for that data. For example, click the Before-Tax Deductions row to access the Before-Tax Deductions details page, then click either the Selected Check tab or theYear-to-Date tab.

Note: For non-PDF paychecks, year-to-date data is available for the most recent paycheck only.

The Year-to-Date tab is available on the following smartphone detail pages:

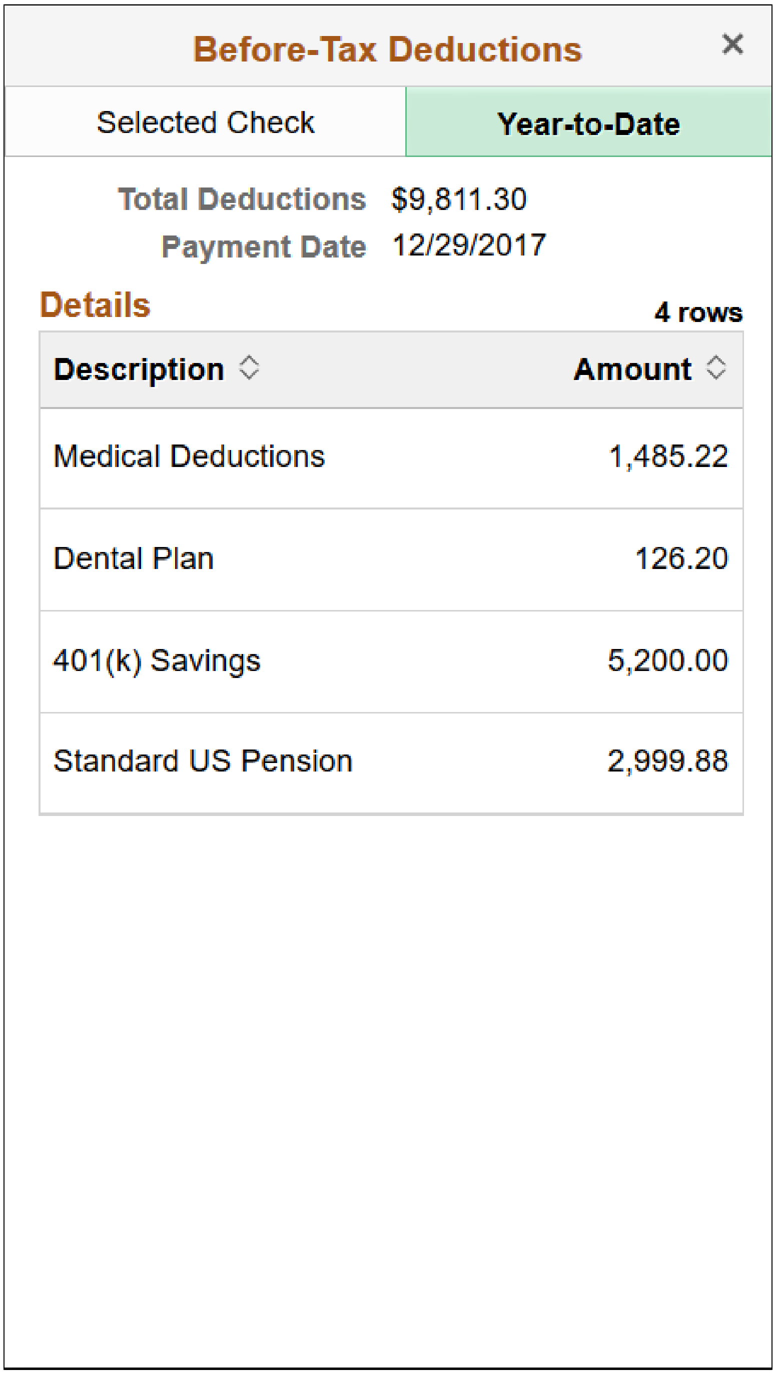
- Earnings
- Taxes
- Before-Tax Deductions
- After-Tax Deductions
- Employer Paid Benefits

Note: On the Taxes details page, in addition to the Selected Check and Year-to-Date tabs, you can also click the Personal Tax Information row on the Selected Check view to access the Personal Tax Info page where you can view federal and (USA) state or (CAN) provincial withholding status for the employee.

Note: (USA) On the Earnings details page, in addition to the Selected Check and Year-to-Date tabs, if your system is set for a USA state (for example, CA, CO, HI, NY, OR) requiring that prior or future pay period begin and end dates, or FLSA or alternative overtime rate and calculated derived overtime rate, appear on pay statements, you can also click the relevant earnings row to access the Additional Earnings details page where you can view details about the required data.

Image: (Smartphone) Before-Tax Deductions page, Year-to-Date tab, example

This example illustrates the Before-Tax Deductions page, Year-to-Date tab, on a smartphone.



Viewing PDF Paychecks

If paycheck PDFs are available, the View PDF Paycheck link appears on the (USA) Paycheck Summary page or (CAN) Paycheque Summary page. Click the View PDF Paycheck link to access the paycheck PDF.

Note: Due to limited space on a smartphone, Pay Group, Business Unit, Employee Address, Employee ID, Department, and Location do not appear on a smartphone paycheck PDF.

The View PDF Paycheck link is available on the Paycheck Summary page only if the PDF Paychecks check box is selected in the Mobile Small Form Factor group box on the "Paycheck Options Table Page" (PeopleSoft HCM 9.2: Payroll for North America).

An employee can have a combination of PDF and non-PDF paychecks. For more information on PDF paychecks, see "Setting Up to Print and View Paychecks and Year-End Pay Forms with BI Publisher (BIP)" (PeopleSoft HCM 9.2: Payroll for North America).

Note: If masking of direct deposit accounts is configured for wage statements on the "Payroll for NA Installation Page" (PeopleSoft HCM 9.2: Payroll for North America), all but the last four characters of the direct deposit account are masked on self-service PDF and non-PDF paychecks and advices. See Setting Up and Viewing Direct Deposit and "Defining System Settings for Payroll for North America" (PeopleSoft HCM 9.2: Payroll for North America).

View Paycheck Page

(Tablet Only) Use the View Paycheck page (PY_IC_PI_DATA_SCF) to view details of the selected paycheck.

Navigation

Click a paycheck row on the Pay page.

Image: (Tablet) View Paycheck Page (1 of 4)

This example illustrates the View Paycheck page (1 of 4) for a tablet.

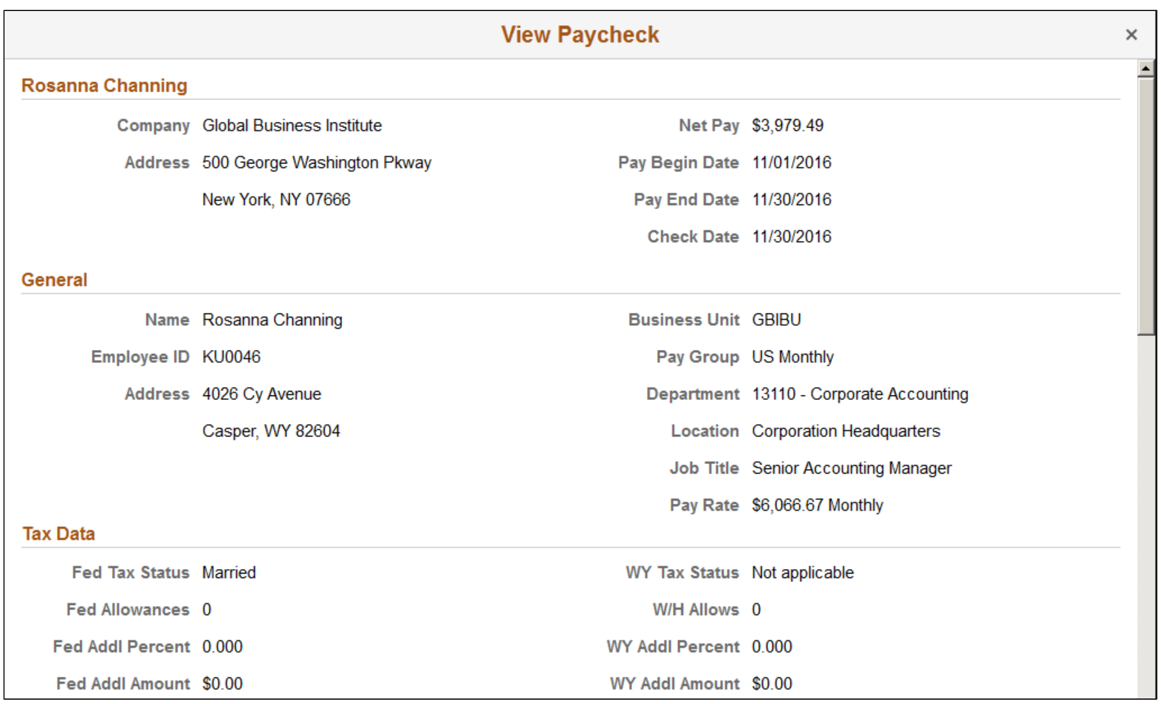


Image: (Tablet) View Paycheck Page (2 of 4)

This example illustrates the View Paycheck page (2 of 4) for a tablet.

Paycheck Summary

Period	Gross Earnings	Fed Taxable Gross	Total Taxes	Total Deductions	Net Pay
Current	6,142.74	5,417.80	1,089.45	1,073.80	3,979.49

Earnings

Description	Hours	Rate	Amount
Regular			6,066.67
Sick	8.00	35.000000	280.00
Gen Cred			60.15
Med Cred			15.00
Den Cred			0.92
Regular	-8.00	35.000000	-280.00
Total:			6,142.74

Taxes

Description	Amount
Fed Withholdng	628.50
Fed MED/EE	87.37
Fed OASDI/EE	373.58
Total:	1,089.45

Image: (Tablet) View Paycheck Page (3 of 4)

This example illustrates the View Paycheck page (3 of 4) for a tablet.

Before-Tax Deductions

Description	Amount
Medical	92.14
Dental	16.88
Vision	10.50
401(k)	462.93
Std US Pen	144.67

After Tax Deductions

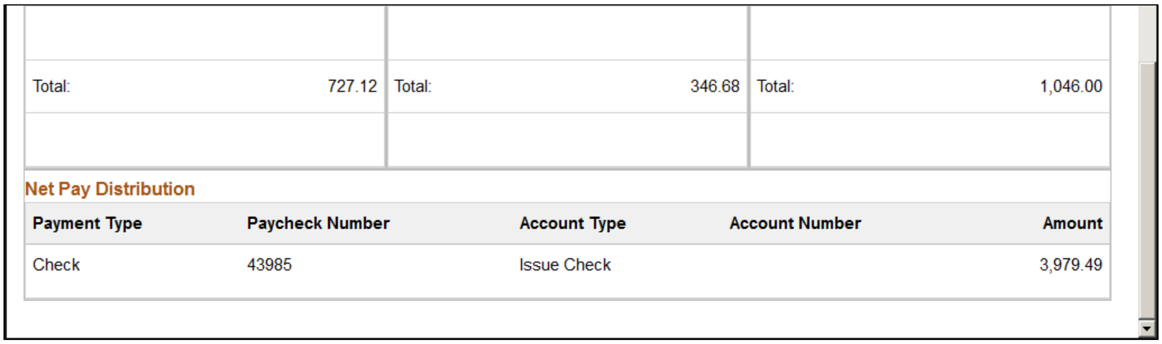
Description	Amount
Suppl Life	30.52
STD (High)	2.43
LTD	24.40
401(k)	115.73
ESPP Ded	173.60

Employer Paid Benefits

Description	Amount
Medical	529.86
Dental	4.00
Vision	3.00
Basic Life	7.00
Suppl Life Taxable	2.18
AD&D Flat	2.00
STD (High)	6.09
401(k)	347.20
Std US Pen	144.67

Image: (Tablet) View Paycheck Page (4 of 4)

This example illustrates the View Paycheck page (4 of 4) for a tablet.



Total:	727.12	Total:	346.68	Total:	1,046.00

Net Pay Distribution

Payment Type	Paycheck Number	Account Type	Account Number	Amount
Check	43985	Issue Check		3,979.49

Paycheck Analytics Page

(Smartphone Only) Use the (USA) Paycheck Analytics page (PY_IC_PI_PCANA_SCF) or (CAN) Paycheque Analytics page (PY_IC_PI_PCANC_SCF) to view data for the selected paycheck in pie chart form.

Navigation

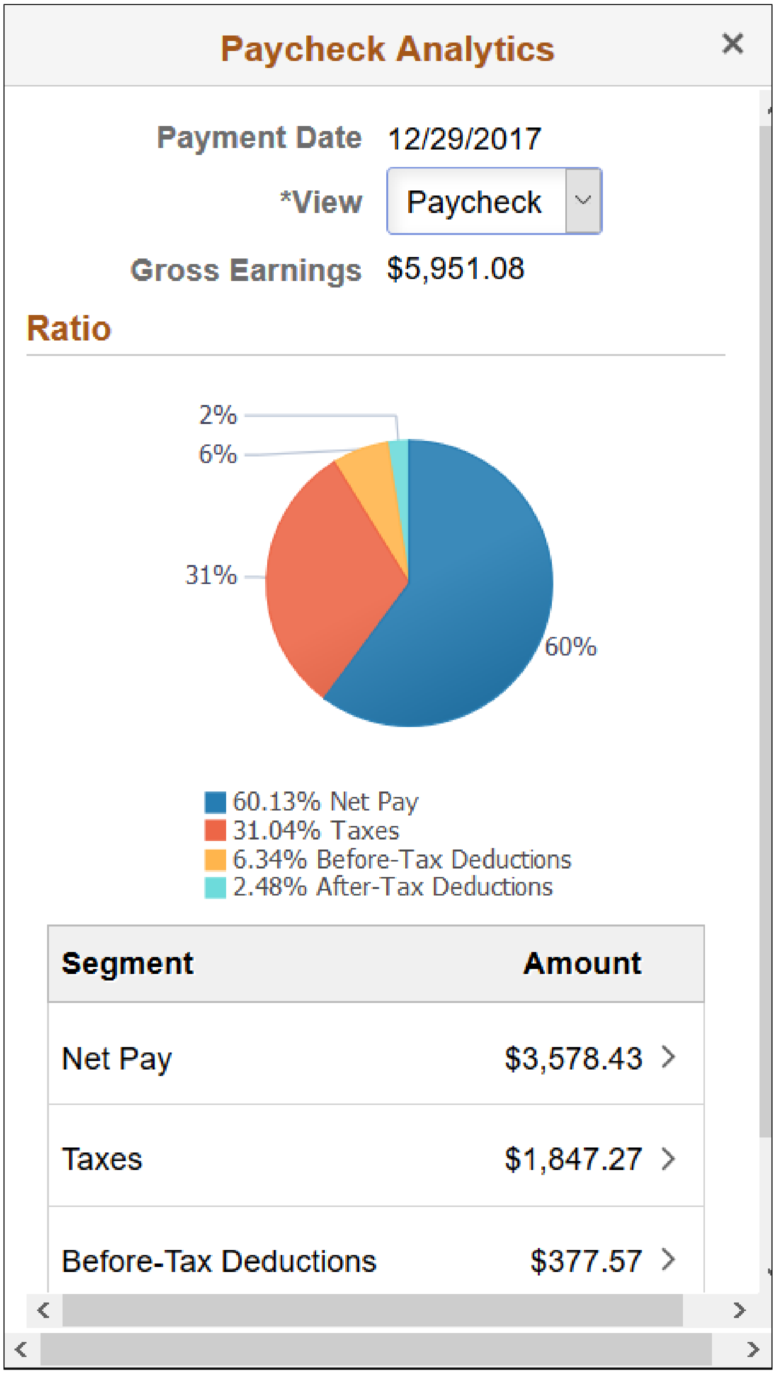
Click the Paycheck Analytics row on the Paycheck Summary page.

Note: The Paycheck Analytics row and page are available only if the Paycheck Analytics check box is selected on the "Paycheck Options Table Page" (PeopleSoft HCM 9.2: Payroll for North America). If the user is in accessible mode, the Paycheck Analytics row is automatically hidden regardless of the setting on the Paycheck Options Table page.

See Setting Up and Viewing Self-Service Paychecks and "Setting Up to Print and View Paychecks and Year-End Pay Forms with BI Publisher (BIP)" (PeopleSoft HCM 9.2: Payroll for North America).

Image: (Smartphone) Paycheck Analytics Page

This example illustrates the Paycheck Analytics page on a smartphone.



View	Click the View button on the Paycheck Analytics page to switch the pie chart display between Paycheck view, Earnings view, and Deductions view for the selected paycheck.

Setting Up Updateable PDF Tax Forms

Oracle's PeopleSoft Payroll for North America provides updateable PDF tax forms to enable employees to update their federal and state tax withholding information using PeopleSoft employee self-service (ePay) Fluid User Interface.

Note: Non-resident aliens do not have access to updateable PDF tax forms.

Note: If an employee has a Lock-in Letter or otherwise has a limit applied to the number of withholding allowances for a jurisdiction, then they do not have access to updateable PDF tax forms for that jurisdiction.

Related Links

Using the PeopleSoft Fluid User Interface to Update PDF Tax Forms

Pages Used to Set Up Updateable PDF Tax Forms

Page Name	***Definition Name***	***Usage***
Roles Page	USER_ROLES	Verify or assign the security roles of *PeopleSoft User* and *NA Payroll WH Form User* to enable access to updateable PDF tax forms. **Note:** The Payroll Administrator must have the *NA Payroll WH Form Admin* role to do this. See *PeopleTools, Administration Tools, Security Administration Administering User Profiles, Specifying User Profile Attributes, Setting Roles.*
PDF Tax Form Table Page	PY_PDF_TAXFORM	Define self-service updateable PDF tax form, including controlling whether to mask the National ID in the display.
Tax Jurisdiction Error Options Page	PY_PDF_AWE_OPTN	Define which changes on the Federal Tax Withholding Forms and State Tax Withholding Forms pages require Payroll Administration notification or approval.
Tax Jurisdiction Mapping Page	PY_JUR_MAPPING	Map an updateable PDF tax form and special instructions to its tax jurisdiction, and add links to third-party resources.
Company Mapping Page	PY_PDF_COMP_MAP	Map federal and state tax jurisdictions for the company, including control of the jurisdiction display sequence on the self-service Tax Withholding page, inactive job and person of interest access, and setting notification or approval required for each jurisdiction.

Page Name	Definition Name	Usage
Withholding Form PDF Mapping Page	PY_W4_FORM_MAP	View the fields and parameters that are mapped between the updateable agency PDF and the PeopleSoft BI Publisher template.

Understanding Updateable PDF Tax Forms

Oracle's PeopleSoft Payroll for North America provides updateable PDF tax forms to enable USA employees to update their federal and state tax withholding information using ePay self-service and the PeopleSoft Fluid User Interface.

The Self-Service Transaction

Employees access updateable tax forms from the Fluid Interface Payroll tile. The system extracts the employee's data from PeopleSoft and pre-fills selected fields in an updateable PDF of the tax form for that jurisdiction.

When the employee updates the tax data and submits the form, the system saves the form, and displays a new PDF with a confirmation message and additional information. Depending on the settings on the PDF Tax Form Table page, the confirmation PDF can also include the completed withholding form. If no approvals are required, then submitting the form also updates the PeopleSoft Tax Data tables with the new information.

Notifications

When an employee submits a change, the system sends the employee an email notification.

Important! Notification emails are sent to the primary email address for the recipient's User Profile, not to the email address in the recipient's HR personal data record.

Employees cannot update their own User Profile email address. Administrators are responsible for maintaining this information. To view or update the email address for a User Profile, click the Edit Email Addresses link on the General page of the User Profiles component (PeopleTools >Security >User Profiles >User Profiles).

The system also notifies the Payroll Administrator of submitted change. If the Approval Workflow Engine (AWE) is enabled and Approval Required is selected on the Company Mapping Page for the jurisdiction, the system submits the changes to the Payroll Administrator for approval first, and updates the data only after approval is entered.

Updateable PDF Configuration

Oracle delivers updateable PDF tax form functionality with USA federal and state jurisdictions available on the Company Mapping page, but you must set these up for each company.

Payroll Administrators use the Tax Jurisdiction Mapping Page to add and maintain links to third-party resources, such as a tax withholding calculator or non-resident alien (NRA) and other forms that PeopleSoft does not yet support. Payroll Administrators can use the Text Catalog to modify the Special Instructions text and most messages and warnings to meet your organization's needs.

Prerequisites

Adobe Acrobat Reader X or higher or Adobe Acrobat DC, PeopleSoft BI Publisher, PeopleSoft Payroll for North America and PeopleSoft ePay are required.

Updateable PDF tax forms functionality works for BI Publisher reports using PDF Templates only (not RTF templates, which can also be used to output PDF). PeopleSoft delivers many agency PDF tax withholding forms already mapped to BI Publisher report PDF templates.

Note: Currently, due to Adobe PDF limitations, updateable PDF tax forms are available only from a desktop or laptop; they are not available from a mobile device.

The PeopleTools security roles of *PeopleSoft User* and *NA Payroll WH Form User* must be assigned to each user ID that should have access to updateable PDF tax forms. Jurisdictions must be mapped to the company.

For Payroll Administrators to approve changes to self-service updateable PDF tax forms, PeopleSoft Approval Workflow Engine (AWE) must be enabled, and the *Approval Required* check box must be selected for each state on the Company Mapping table.

PDF Tax Form Table Page

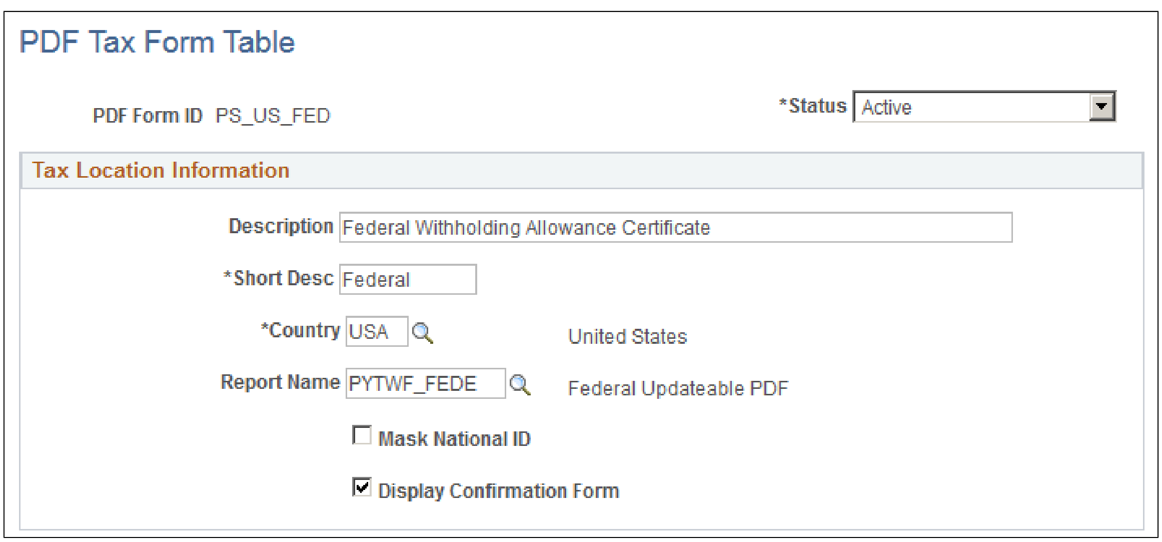
Use the PDF Tax Form Table page (PY_PDF_TAXFORM) define self-service updateable PDF tax form, including controlling whether to mask the National ID in the display.

Navigation

Set Up HCM > Product Related > Payroll for North America >Updateable Withholding Forms >PDF Tax Form Table

Image: PDF Tax Form Table page

This example illustrates the fields and controls on the PDF Tax Form Table page.



Report Name Select the name of the BI Publisher report to use for the updateable PDF tax form.

Mask National ID	Select this check box to mask all but the last four digits of the national ID (US Social Security Number) on the employee's updateable PDF tax form. **Note:** Even when masked, the full number appears for the Payroll Administrator role.
Display Confirmation Form	Select this check box to include a filled-out withholding form in the confirmation PDF that employees see after submitting changes on an updateable PDF. In all of PDF tax forms that PeopleSoft delivers, this check box is selected by default. You can de-select it if you do not want to include the filled-out withholding form in the confirmation PDF. The confirmation PDF appears regardless of this setting, but if this check box is not selected, the confirmation PDF includes only a confirmation message without a copy of the withholding form. **Note:** This check box is available if you use PeopleTools 8.55.07 or later. On earlier versions of PeopleTools, the confirmation PDF always includes a copy of the withholding form.

Tax Jurisdiction Mapping Page

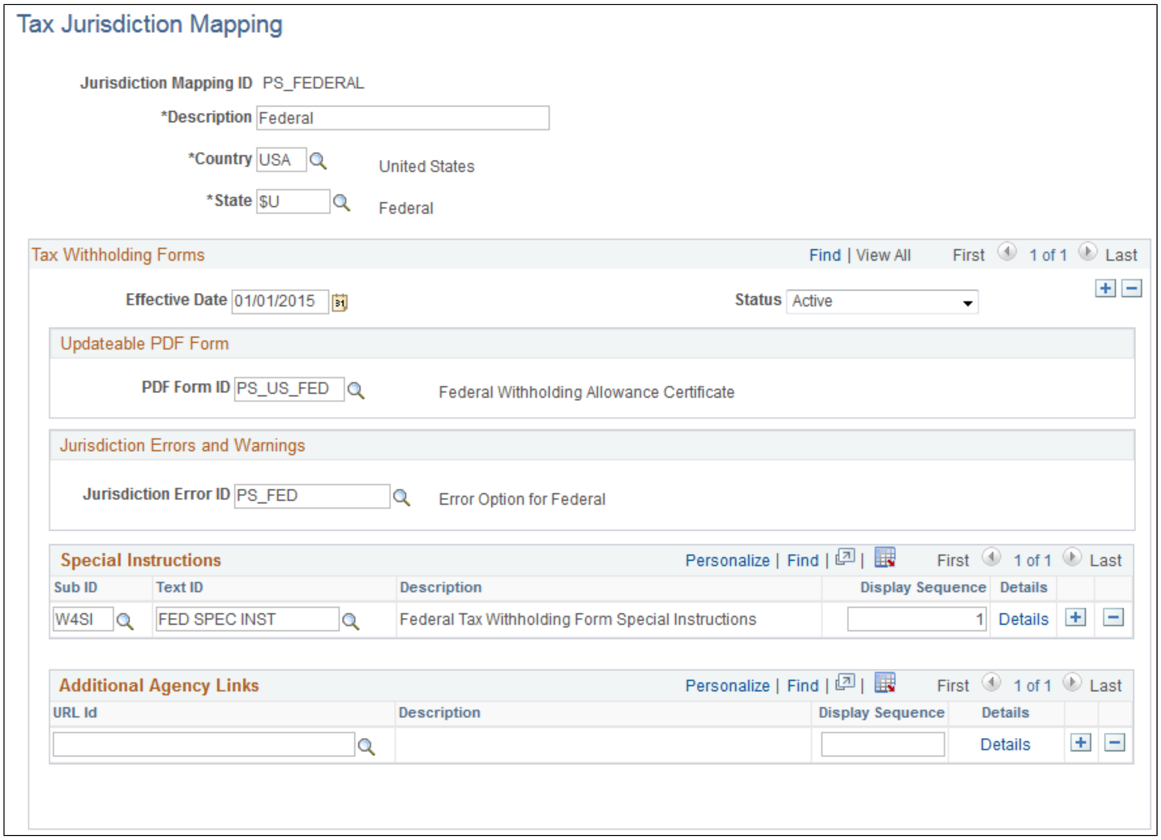
Use the Tax Jurisdiction Mapping page (PY_JUR_MAPPING) to map an updateable PDF tax form and special instructions to its tax jurisdiction, and add links to third-party resources.

Navigation

Set Up HCM > Product Related > Payroll for North America >Updateable Withholding Forms >Jurisdiction Mapping

Image: Tax Jurisdiction Mapping page

This example illustrates the fields and controls on the Tax Jurisdiction Mapping page.



Updateable PDF Form

PDF Form ID

Specify the updateable PDF tax form to use for this jurisdiction. Available forms are from the PDF Tax Form Table Page.

Jurisdiction Errors and Warnings

Jurisdiction Error ID

Select the error or warning to use when AWE is enabled. Errors and warnings are available from the Tax Jurisdiction Error Options Page.

Special Instructions

Sub ID

Select the Text Catalog Sub ID for the text to use as special instructions for the updateable PDF tax form.

Text ID

Select the Text Catalog ID to use for this updateable PDF tax form. You can add or delete a Text ID.

If more than one row is defined, the system adds a line space between the two instructions (to create a new paragraph) on the employee self-service Tax Withholding Forms page (either the Federal Tax Withholding Forms Page or the State Tax Withholding Forms Page).

For information on using the Text Catalog to configure text, see "Configuring the Text Catalog" (PeopleSoft HCM 9.2: Application Fundamentals) in your *PeopleSoft HCM Applications Fundamentals* product documentation.

Additional Agency Links

URL Id

Payroll Administrators can define additional forms or resources to make available by selecting from URL IDs defined in the PeopleTools URL Table. When more than one row is added, this field must be defined to save the page.

For information about the URL Table, see *PeopleTools, Administration Tools, System and Server Administration, Using PeopleTools Utilities, Using Administration Utilities, URL Maintenance.*

Tax Jurisdiction Error Options Page

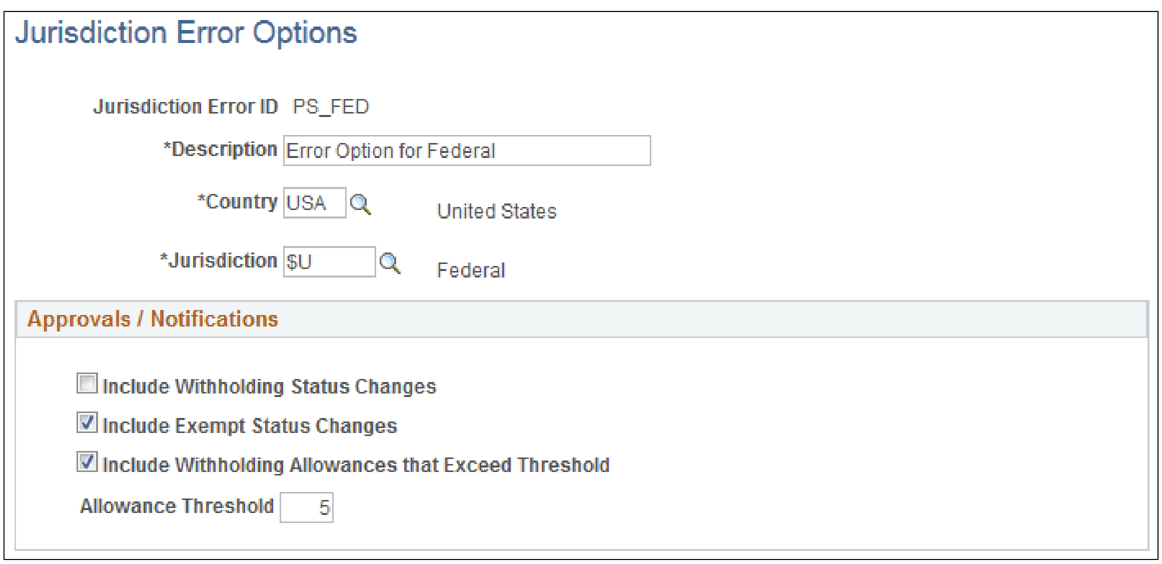
Use the Jurisdiction Error Options page (PY_PDF_AWE_OPTN) to define which changes on the Federal Tax Withholding Forms page and State Tax Withholding Forms pages require Payroll Administration notification or approval.

Navigation

Set Up HCM > Product Related > Payroll for North America >Updateable Withholding Forms >Jurisdiction Error Options

Image: Jurisdiction Error Options page

This example illustrates the fields and controls on the Jurisdiction Error Options page.



Approvals / Notifications

Include Withholding Status Changes

If AWE is enabled, selecting this check box submits to the Payroll Administrator for approval any Tax Status, Allowance, Additional Amount, Additional Allowance or Additional Percent changes. Approval will be required before the changes are applied to tax data in the system.

If AWE is disabled, selecting this check box notifies the Payroll Administrator of the changes, but does not require approval before saving the tax data.

Settings on the Company Mapping Page determine if this is a notification or if approval is needed.

Include Exempt Status Changes

If AWE is enabled, selecting this check box submits to the Payroll Administrator for approval, the employees who have changed their status to *Exempt.* Approval will be required before the changes are applied to tax data in the system.

If AWE is disabled, selecting this check box notifies the Payroll Administrator of the changes, but does not require approval before saving the tax data.

Settings on the Company Mapping Page determine if this is a notification or if approval is needed.

Allowance Threshold

Enter the highest number of allowances permitted for the jurisdiction.

If AWE is enabled, the system submits to the Payroll Administrator for approval, the employees who have changed their withholding allowances to an amount that exceeds the defined threshold.

If AWE is disabled, the system notifies the Payroll Administrator of the changes, but does not require approval before saving the tax data.

Settings on the Company Mapping Page determine if this is a notification or if approval is needed.

Company Mapping Page

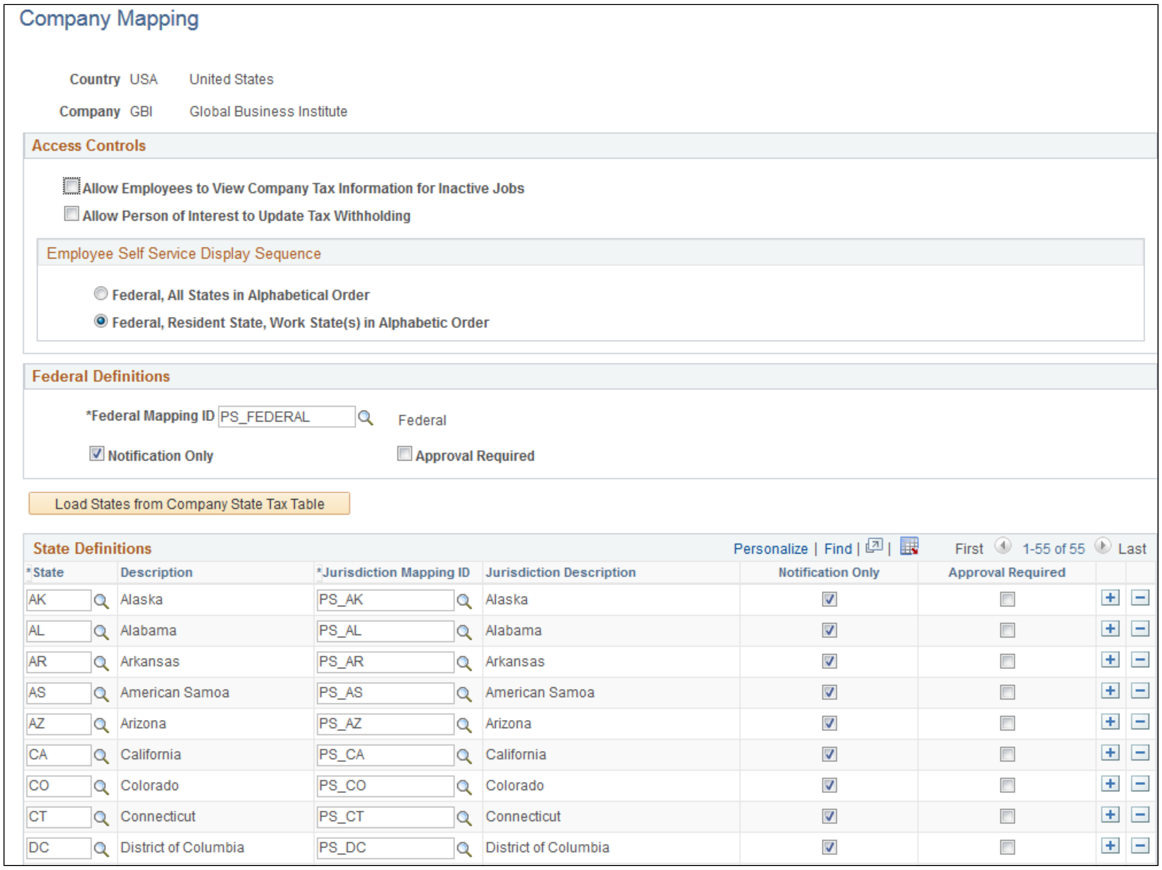
Use the Company Mapping page (PY_PDF_COMP_MAP) to map federal and state tax jurisdictions for the company, including control of the jurisdiction display sequence on the self-service Tax Withholding page, inactive job and person of interest access, and setting notification or approval required for each jurisdiction.

Navigation

Set Up HCM > Product Related > Payroll for North America >Updateable Withholding Forms >Company Mapping

Image: Company Mapping page

This example illustrates the fields and controls on the Company Mapping page.



Allow Employees to View Company Tax Information for Inactive Jobs	Select this check box to allow an employee assigned to an inactive job to view their tax withholding information. The system looks at the Update Employee Tax Data page and Job Record to determine if the employee is assigned to more than one company. If the employee is associated with only one company information on the self-service Tax Withholding page is read only. If the employee has more than one company a search icon is available so the employee can select the active or inactive company that they want to view.
Federal, All States in Alphabetical Order or **Federal, Resident State, Work State(s) in Alphabetic Order**	Select an option to control the order in which jurisdictions appear on the self-service Tax Withholding page. The system displays the employee's tax withholding information from the Federal Tax Data and State Tax Data pages in the Employee Pay Data component, and provides access to the employee's updateable PDF withholding form for that jurisdiction. The order in which the jurisdictions appear depends on the selection that you make here. If a jurisdiction does not have income tax, the Tax Status on the self-service Tax Withholding page is *n/a* for not applicable.

	If a state has an associated local income tax, the row appears, but no updateable PDF is available.
Notification Only	Select the *Notification Only* check box to send a notification to the Payroll Administrator when employees make the changes defined on the Tax Jurisdiction Error Options Page.
Approval Required	Select the *Approval Required* check box for Approval Workflow Engine (AWE), if enabled, to submit changes to your Payroll Administrator for approval before updating tax records in the system. For more information about AWE, see "Understanding Approvals" (PeopleSoft HCM 9.2: Application Fundamentals) in your *PeopleSoft HCM Application Fundamentals* documentation. When Approval Required is selected and the employee submits changes on the updateable PDF tax form, the systems displays *Pending Approval* in that row on the self-service Tax Withholding page. The employee can click the arrowhead in that row to access the Pending Approval page and view the status and changes, however the changes are not updated in the Tax Data pages and the employee is prevented from making further tax withholding changes for that jurisdiction until the Payroll Administrator has entered approval.
Load States from Company State Tax Table	When the Company Mapping page appears for an unmapped company, the State Definitions grid is empty. Click the Load States from Company State Tax Table button to load all of the state definitions that are defined in the Company State Tax Table.
Jurisdiction Mapping ID	Click the search icon beside the Jurisdiction Mapping ID field to select the state's respective Jurisdiction Mapping ID from the list of IDs that PeopleSoft delivers predefined. on the Tax Jurisdiction Mapping Page. To save the Company Mapping page, you must identify the Jurisdiction Mapping ID for each state that you want to use, and delete all rows that you do not want to use.

Withholding Form PDF Mapping Page

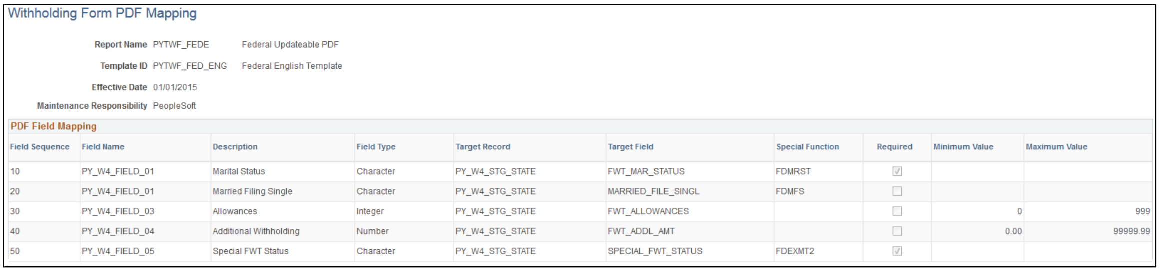
Use the Withholding Form PDF Mapping page (PY_W4_FORM_MAP) to view the fields and parameters that are mapped between the updateable agency PDF and the PeopleSoft BI Publisher template.

Navigation

Set Up HCM > Product Related > Payroll for North America >Updateable Withholding Forms >Withholding Form PDF Mapping

Image: Withholding Form PDF Mapping page

This example illustrates the fields and controls on the Withholding Form PDF Mapping page.



Withholding Form PDF Mapping

Report Name PYTWF_FEDE Federal Updateable PDF

Template ID PYTWF_FED_ENG Federal English Template

Effective Date 01/01/2015

Maintenance Responsibility PeopleSoft

PDF Field Mapping

Field Sequence	Field Name	Description	Field Type	Target Record	Target Field	Special Function	Required	Minimum Value	Maximum Value
10	PY_W4_FIELD_01	Marital Status	Character	PY_W4_STG_STATE	FWT_MAR_STATUS	FDMRST	✓		
20	PY_W4_FIELD_01	Married Filing Single	Character	PY_W4_STG_STATE	MARRIED_FILE_SINGL	FDMFS			
30	PY_W4_FIELD_03	Allowances	Integer	PY_W4_STG_STATE	FWT_ALLOWANCES			0	999
40	PY_W4_FIELD_04	Additional Withholding	Number	PY_W4_STG_STATE	FWT_ADDL_AMT			0.00	99999.99
50	PY_W4_FIELD_05	Special FWT Status	Character	PY_W4_STG_STATE	SPECIAL_FWT_STATUS	FDEXMT2	✓		

PeopleSoft delivers agency tax withholding forms pre-mapped to a BI Publisher PDF template for many tax jurisdictions. The Withholding Form PDF Mapping page is read only for the PDFs that PeopleSoft delivers pre-mapped.

Using the PeopleSoft Fluid User Interface to Update PDF Tax Forms

Oracle's PeopleSoft updateable PDF tax forms functionality enables USA employees to update their federal and state tax withholding information using PeopleSoft employee self-service (ePay) Fluid User Interface. For an overview of this process, see Understanding Updateable PDF Tax Forms.

The following videos demonstrate how employees work with updateable PDF tax forms:

Video Feature Overview: PeopleSoft Online Withholding Forms

PeopleSoft HCM 9.2 Image 18 Highlights: Updateable PDF for W4

Note: Updateable PDF tax forms are available only for the US. This functionality is available only from a desktop or laptop, not from mobile devices.

Related Links

Setting Up Updateable PDF Tax Forms

Pages Used to Update PDF Tax Forms

Page Name	***Definition Name***	***Usage***
Payroll Tile	HC_PY_SS_NAVCOLL_FL (cref for the tile) PY_IC_WH_PTILE_FLU (page for dynamic data)	Access a collection of self-service payroll transactions, including making self-service tax withholding updates.

Page Name	Definition Name	Usage
Tax Withholding Page	PY_W4_MAIN_FL	View a list of their tax withholding information and access their Tax Withholding Forms page for a jurisdiction.
Federal Tax Withholding Forms Page	PY_W4_MAIN_FED_SCF	View a list of updateable federal tax forms and additional agency links, if any, and access the form or URL.
State Tax Withholding Forms Page	PY_W4_MAIN_ST_SCF	View a list of updateable state tax forms for that jurisdiction and additional agency links, if any, and access the form or URL.
W-4 Tax Withholding Form Approval Page	EOAWMA_TXNHDTL_FL	Payroll administrators use this page to approve tax withholding changes that employees submit using self-service.

Understanding the Updateable PDF Withholding Form Process

Using updateable PDFs to change withholding elections consists of these steps:

1. The employee accesses the Tax Withholding Page to review current withholding elections.
2. The employee selects a jurisdiction to update.

   Depending on the selected jurisdiction, either the Federal Tax Withholding Forms Page or the State Tax Withholding Forms Page appears. These pages list relevant withholding forms and any additional information.
3. The employee clicks the specific withholding form to be updated.
4. The system displays a warning that a form with personal information will be downloaded to the user's computer.
5. If the employee continues past the warning, the system downloads the form and, depending on the browser settings, prompts the user to save or open the PDF file.
6. The employee opens the PDF file.

   If the browser does not prompt the employee to open the file, the employee can open it manually.
7. The employee enters new withholding elections in the updatable PDF form and then clicks the Submit button.
8. The system prompts the employee enters his or her PeopleSoft User ID and password.
9. The system validates the employee's logon credentials and updates the database (if no approval is required) or sends the request to the approver (if approval is required).
10. The system displays a new PDF file with a confirmation message and a reminder to close the original PDF.

As delivered, the new PDF file also includes a filled-out withholding form with the employee's new elections. If you use PeopleTools 8.55.07 or later, the PDF Tax Form Table Page includes a configuration option so that you can prevent the filled-out form from appearing.

11. The system sends a confirmation email to the primary email address in the employee's User Profile.

Important! Notification emails are sent to the email address that is associated with the employee's PeopleSoft User ID, not to the email address in the recipient's HR personal data record.

Employees cannot update their own User Profile email address. Administrators are responsible for maintaining this information. To view or update the email address for a User Profile, the administrator clicks the Edit Email Addresses link on the General page of the User Profiles component (PeopleTools >Security >User Profiles >User Profiles).

12. If approvals are required, the system sends the employee an additional email after approvals are complete.

Tax Withholding Page

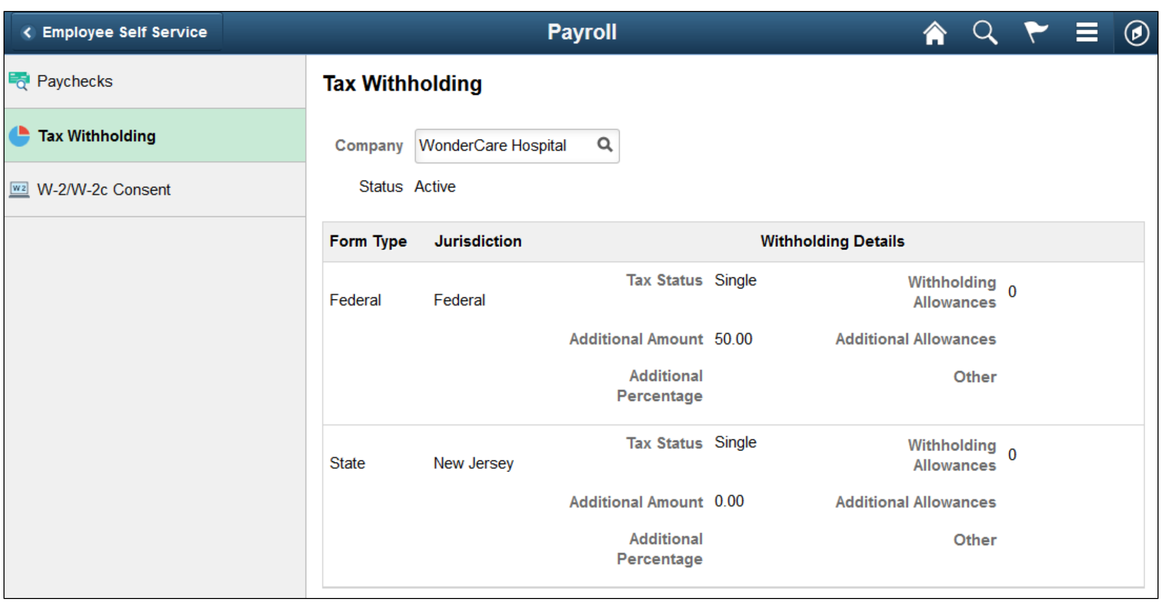
Use the Tax Withholding page (PY_W4_MAIN_FL) to view a list of their tax withholding information and access their Tax Withholding Forms page for a jurisdiction.

Navigation

Access the PeopleSoft Fluid User Interface, Employee Self-Service home page (Fluid Home >Employee Self Service). Click the Payroll tile, and then click Tax Withholding in the left navigation pane.

Image: Tax Withholding page

This example illustrates the Tax Withholding page on a desktop.



The Tax Withholding page displays the employee's federal and state tax information.

If an employee works for only one company, the Company field is read-only. If the employee works for more than one company, the Company field is editable, and the page initially displays information related to the employee's primary job.

The jurisdictions that appear are based on the employee's PeopleSoft Tax Data table pages (Federal Tax Data and State Tax Data) and Job Record, including whether the employee is assigned to more than one company or has withholding in more than one state, in which case the employee can choose which one to view.

Each jurisdiction's withholding form is updated independently. When one jurisdiction has requirements based on another jurisdiction, the employee must update the forms in the correct order.

For example, Idaho and South Carolina do not allow the number of state allowances to exceed the number of federal allowances. So employees who want to increase the number of state allowances might need to first increase their federal withholding allowances. Similarly, employees who want to decrease their federal allowances might need to first decrease their state allowance. If an employee attempts to make an invalid change, the changes are not submitted and the employee receives a message that explains the validation error.

Data here also indicates if the employee has special tax withholding situations, such as if they have claimed exemption from withholding or have an IRS Lock In Letter indicating the maximum number of withholding allowances they are permitted. Updateable PDF forms are available or unavailable based on those situations.

An arrowhead appears in rows where updateable PDF tax forms are available.

For more information on the Tax Withholding page, see Setting Up Updateable PDF Tax Forms.

Federal Tax Withholding Forms Page

Use the Federal Tax Withholding Forms page (PY_W4_MAIN_FED_SCF) to view a list of updateable federal tax forms and additional agency links, if any, and access the form or URL.

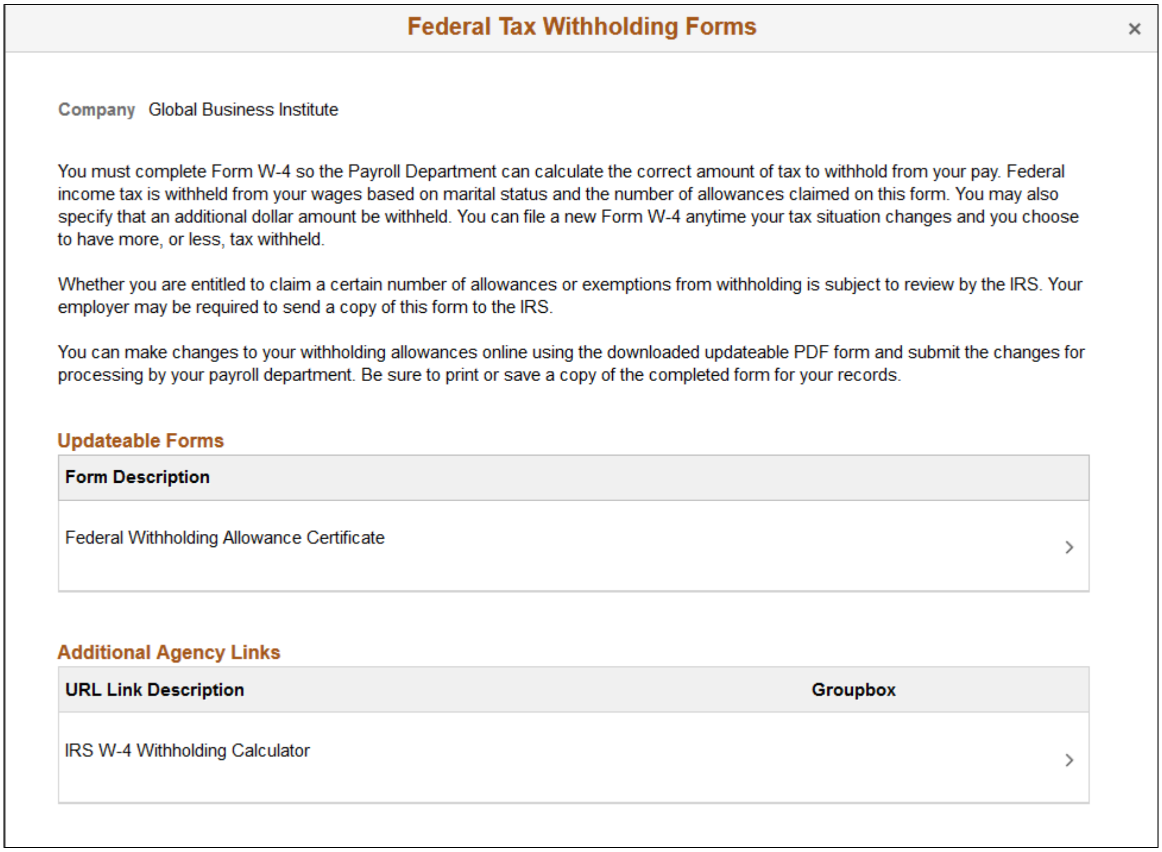
Navigation

Access the PeopleSoft Fluid User Interface, Employee Self-Service home page (Fluid Home >Employee Self Service). Click the Payroll tile, click Tax Withholding in the left navigation pane, and click the Federal row with arrowhead on the Tax Withholding page.

Note: The State Tax Withholding Forms page (PY_W4_MAIN_ST_SCF) is similar to the Federal Tax Withholding Forms page (PY_W4_MAIN_FED_SCF). To access, click a state tax row with arrowhead on the Tax Withholding page.

Image: Federal Tax Withholding Forms page

This example illustrates the Federal Tax Withholding Forms page.


Federal Tax Withholding Forms

Company Global Business Institute

You must complete Form W-4 so the Payroll Department can calculate the correct amount of tax to withhold from your pay. Federal income tax is withheld from your wages based on marital status and the number of allowances claimed on this form. You may also specify that an additional dollar amount be withheld. You can file a new Form W-4 anytime your tax situation changes and you choose to have more, or less, tax withheld.

Whether you are entitled to claim a certain number of allowances or exemptions from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.

You can make changes to your withholding allowances online using the downloaded updateable PDF form and submit the changes for processing by your payroll department. Be sure to print or save a copy of the completed form for your records.

Updateable Forms

Form Description
Federal Withholding Allowance Certificate

Additional Agency Links

URL Link Description	Groupbox
IRS W-4 Withholding Calculator	

Payroll Administrators can configure and control text on the Federal Tax Withholding Forms and the State Tax Withholding Forms pages to meet your organization’s needs.

Updateable Forms

If an arrowhead appears in a row for the Federal jurisdiction, then an updateable PDF tax form is available. Click the row to access the updateable PDF tax form

Additional Agency Links

If your Payroll Administrator has attached any links to third-party resources, they will appear in this group box. PeopleSoft does not provide or maintain the third-party links. It is up to your Payroll Administrator to add and maintain them.

For more information, see Setting Up Updateable PDF Tax Forms.

For information on using the Text Catalog to configure text, see "Configuring the Text Catalog" (PeopleSoft HCM 9.2: Application Fundamentals) in your *PeopleSoft HCM Applications Fundamentals* product documentation.

State Tax Withholding Forms Page

Use the State Tax Withholding Forms page (PY_W4_MAIN_ST_SCF) to view a list of updateable state tax forms and additional agency links, if any, and access the form or URL.

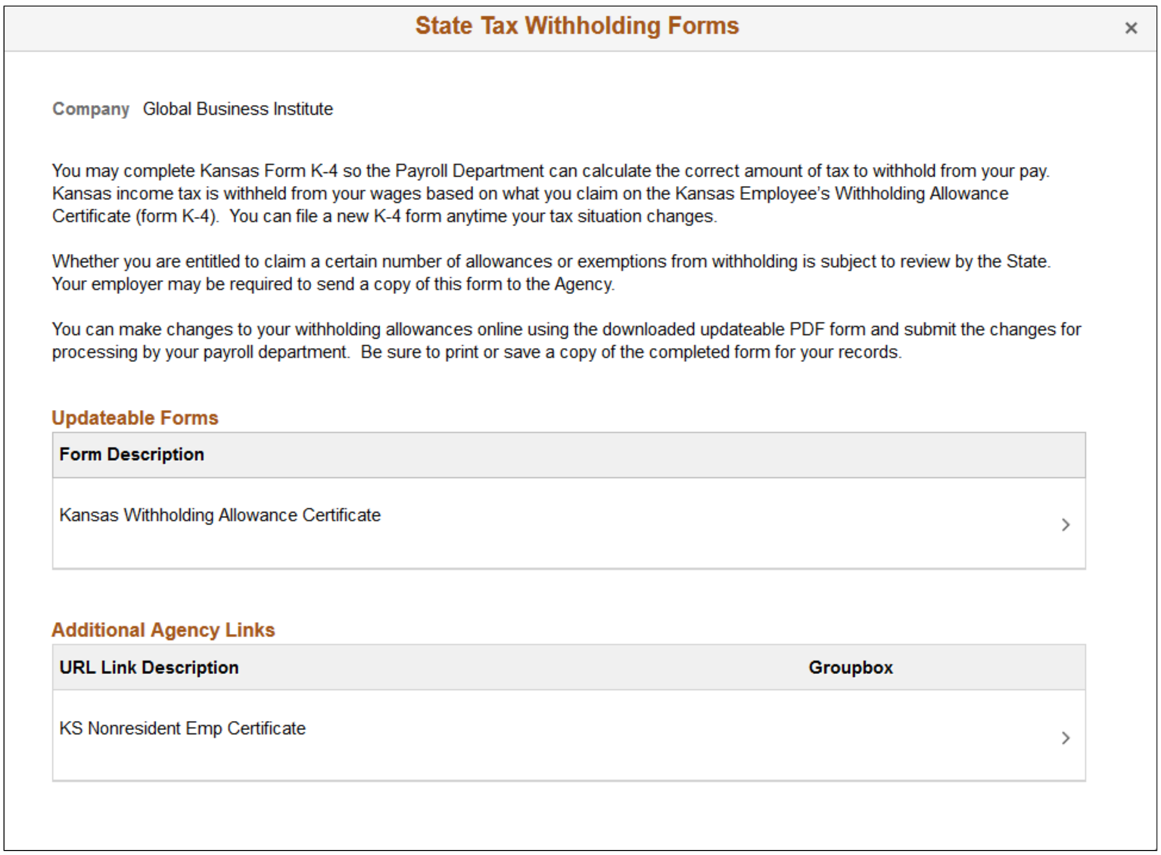
Navigation

Access the PeopleSoft Fluid User Interface, Employee Self-Service home page (Fluid Home >Employee Self Service). Click the Payroll tile, click Tax Withholding in the left navigation pane, and click the State row with arrowhead on the Tax Withholding page.

Note: The State Tax Withholding Forms page (PY_W4_MAIN_ST_SCF) is similar to the Federal Tax Withholding Forms page (PY_W4_MAIN_FED_SCF). To access, click a state tax row with arrowhead on the Tax Withholding page.

Image: State Tax Withholding Forms page

This example illustrates the State Tax Withholding Forms page.



PeopleSoft delivers basic instructions relevant to for the respective state jurisdiction. Payroll Administrators can configure and control the text to meet your organization's needs.

Note: Certain states use the Federal W-4 form for state tax withholding and require that the form indicates that is to be used for state purposes. PeopleSoft delivers the updateable PDF tax W-4 form with the text required by that state in the upper left of the form.

For information on using the Text Catalog to configure text, see "Configuring the Text Catalog" (PeopleSoft HCM 9.2: Application Fundamentals) in your *PeopleSoft HCM Applications Fundamentals* product documentation.

Updateable Forms	If an arrowhead appears in a row for a jurisdiction, then an updateable PDF tax form is available. Click the row to access the updateable PDF tax form.
Additional Agency Links	If your Payroll Administrator has attached any links to third-party resources, they will appear in this group box. PeopleSoft does not provide or maintain the third-party links. It is up to your Payroll Administrator to add and maintain them.

W-4 Tax Withholding Form Approval Page

Use the W-4 Tax Withholding From approval page (EOAWMA_TXNHDTL_FL) to approve tax withholding changes that employees submit using self-service.

Navigation

On the Manager Self-Service home page, click the Approvals tile to access the Pending Approvals page. Then click a W-4 Tax Withholding Form entry on the Pending Approvals page.

Additional options for accessing this page include notification links and from the "Review Transactions Page" (PeopleSoft HCM 9.2: Application Fundamentals).

Note: You can also approve tax withholding changes directly from the "Pending Approvals Page" (PeopleSoft HCM 9.2: Application Fundamentals).

Image: W-4 Tax Withholding Form approval page

This example illustrates the W-4 Tax Withholding Form approval page.

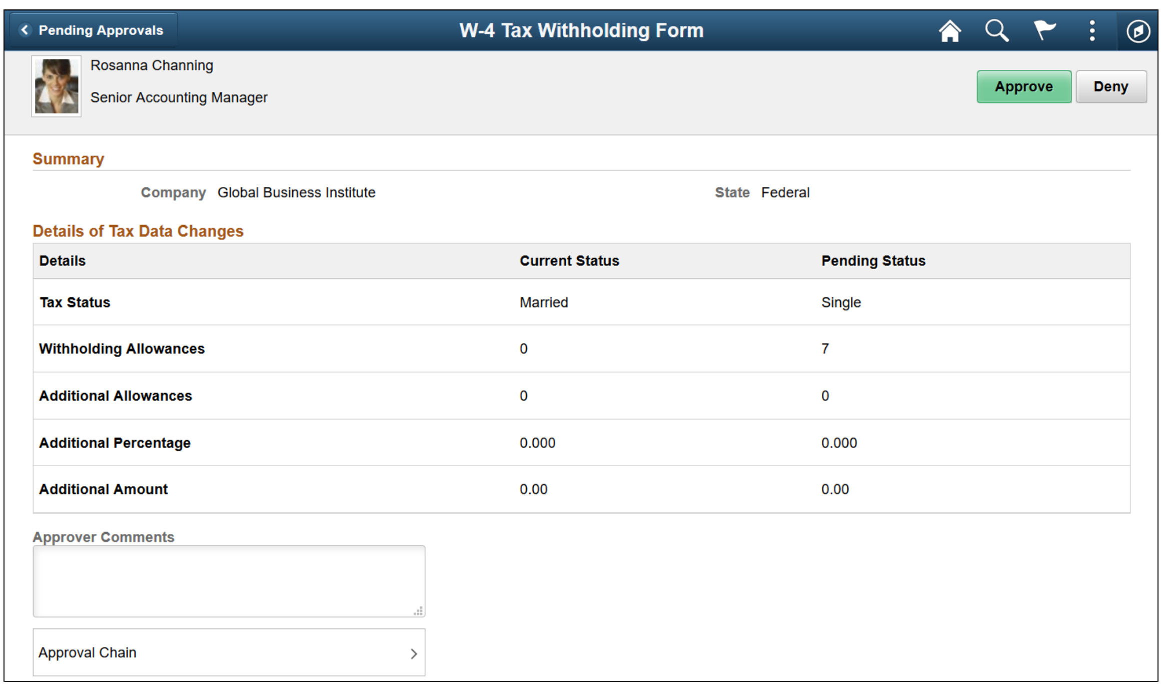
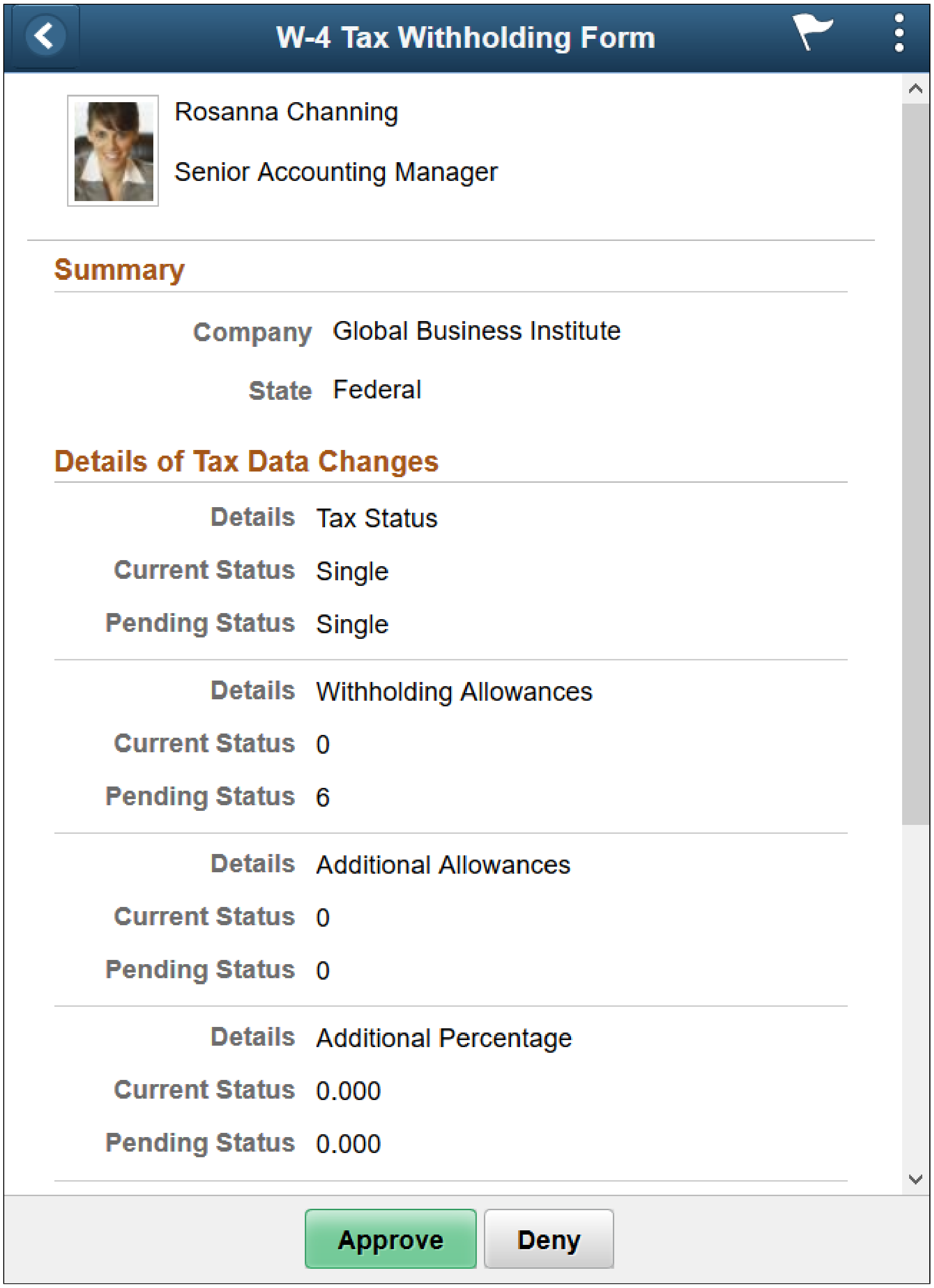


Image: W-4 Tax Withholding Form approval page - small form factor

This example illustrates the W-4 Tax Withholding Form approval page on a small form factor.



Approval Options

The approval options on this page are common to all fluid approval transactions, as described in the documentation for the "Pending Approvals - <Transaction Details> Page" (PeopleSoft HCM 9.2: Application Fundamentals).

Approve and **Deny**	Use these buttons to take action on the requested approval.

Approver Comments Enter any comments related to the approval action you take.

Approval Chain Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction.

Summary

This section displays the company name and the name of the tax jurisdiction.

Details of Tax Data Changes

This section displays the current status and pending status of the fields that the self-service employee was able to update on the withholding form.

All fields are listed, including those that the employee did not change. The specific fields can vary according to the tax jurisdiction.

Managing Consent for Electronic Year-End Forms

This topic provides an overview of employee consent for electronic year-end forms and discusses how to set up and manage consent for self-service year-end forms.

This topic also lists the classic self-service pages that Canadian and US employees use to give and withdraw consent for year-end forms. Fluid pages also exist for US and Canadian employees. For information about Fluid self-service pages for managing consent, see (USA) Using the PeopleSoft Fluid User Interface to Manage Consent and View Electronic Year-End Forms and (CAN) Using the PeopleSoft Fluid User Interface to Manage Consent for Electronic Year-End Forms.

Pages Used to Manage Consent for Self-Service Year-End Forms

Page Name	***Definition Name***	***Usage***
Tax Form BI Publisher Options Page	PY_YE_XMLP_OPTION	Specify the tax year, the tax form, the report definitions, and the URL for the table in which the XML data is stored for producing the self-service forms.
Year End Form Options Page	PY_YE_OPTION_CAN PY_YE_OPTION_USA	Enable self-service year-end forms or slips. This step is required to enable employees to grant consent to receive electronic forms. Also specify the availability date for each form and tax year.
Year End Form Text Page	PY_YE_NOTES	Set up consent and notification text to be used on the consent page or in email notifications sent to employees.

Page Name	***Definition Name***	***Usage***
T4/T4A Consent Form Page RL-1/RL-2 Consent Form Page W-2/W-2c Consent Form Page	PY_SS_CONSENT_CAN PY_SS_CONSENT_MRQ PY_SS_CONSENT_USA	Employees request or withdraw consent to receive electronic year-end slips or forms. Appropriate text appears on the page based on the employee's current status. After saving an update on the page, the employee must enter password verification. After verification, the system displays a confirmation page and sends an email confirmation of the change. If an employee has an invalid email address (such as an email address with invalid characters), the system does not update the employee’s consent. A message informs the employee that consent cannot be updated until a valid email address is on file.
Review T4/T4A Consent Status Page Review RL1/RL2 Consent Status Page Review W-2/W-2c Consent Status Page	PY_FORM_STAT_CAN PY_FORM_STAT_MRQ PY_FORM_STAT_USA	Monitor employee consent status. Review the history of each employee's consent and email notification status.
Year End Consent Status Report Page	RUNCTL_TAX900CS	Run the TAX900CS report, which lists employees' most current self-service year-end form consent status based on dates and status codes that you specify in the report request parameters.
Year End Consent Status Report Page	RUNCTL_CTX900CS	Run the CTX900CS report, which lists employees' most current self-service year-end form consent status based on dates and status codes that you specify in the report request parameters.
Reset T4/T4A Consent Status Page Reset RL-1/RL-2 Consent Status Page Reset W-2 Consent Status Page	PY_RC_RESCON_CAN PY_RC_RESCON_MRQ PY_RC_RESCON_USA	Reset consent status to *Reset Consent* for all employees, selected companies, or selected employees. Enter run parameters for the Reset Form Consent Application Engine process (PYYE_RESCAN or PYYE_RESUSA).

Understanding Employee Consent for Electronic Year-End Forms

This topic discusses employee consent for receiving year-end information online.

Consent for USA Year-End Forms

In the USA, you must secure employee consent before you can substitute self-service viewing and printing of electronic year-end forms in place of printed forms. Among other requirements, you must also provide the opportunity for employees to withdraw their consent.

USA employees who do not have a valid consent on file are still able to access online forms, but they must also be provided with hard copy.

This table describes the availability of USA year-end forms by employee consent status:

Consent Status	***Form Availability***
Consented	The PDF year-end form creation process suppresses the printing of the employee's paper W-2 or W-2c. The employee views and prints the year-end form through self service.
No Consent Received *Withdrawn* *Reset by Employer*	The PDF year-end form creation process prints the employee's paper W-2 or W-2c. The employee can also view and print the year-end form through self service.

Note: If the U.S. employee consents to receive an electronic Form W-2, you must also deliver any related Form W-2c electronically.

Consent for Canadian Year-End Forms

In Canada, consent requirements depend on the form and the year:

- T4 and RL-1 forms for 2017 and beyond do not require employee consent to be viewed and printed through self-service.
- T4 and RL-1 forms prior to 2017 require employee consent to be viewed and printed through self-service. Employees who want to view forms for these years can provide their consent through self-service.
- The T4A and RL-2 forms require employee consent to be viewed and printed through self-service. If no consent is provided, the forms must be provided in paper format.
- Employees must be given the opportunity to withdraw their consent.

This table describes the availability of Canadian year-end forms depending on the form, the year, and the employee’s consent status:

Forms and Year	***Consent Status***	***Form Availability***
T4 and RL-1 slips for any year	*Consented*	The PDF year-end form creation process suppresses the printing of the employee's paper T4 or RL-1. The employee views and prints the year-end slip through self service.

Forms and Year	Consent Status	Form Availability
T4 and RL-1 slips for 2017 and beyond	*No Consent Received* *Withdrawn* *Reset by Employer*	The PDF year-end form creation process prints the employee's paper slip. The employee can view and print the year-end slip through self service.
T4 and RL-1 slips for 2016 and prior	*No Consent Received* *Withdrawn* *Reset by Employer*	The PDF year-end form creation process prints the employee's paper slip. The employee cannot view or print the year-end slip through self service.
T4A and RL-2 slips for any year	*Consented*	The PDF year-end form creation process suppresses the printing of hard copy. The employee views and prints the year-end slip through self service.
T4A and RL-2 slips for any year	*No Consent Received* *Withdrawn* *Reset by Employer*	The PDF year-end form creation process prints the employee's paper slip. The employee cannot view or print the year-end slip through self service.

Managing Consent

To manage the process of obtaining consent from employees, the Payroll for North America and ePay applications provide the following:

- Setup pages where administrators enable or disable self-service year-end form functionality, enter text for consent emails and notifications to employees, and specify forms and other options.
- Self-service pages where employees grant and withdraw consent to receive electronic year-end forms.
- Workflow email confirmation of an employee's current consent status after each online consent status update.
- An online page and a report that administrators use to monitor employee consent status.
- A reset process that enables administrators to reset consent status for all employees, selected companies, or selected employees.

  For example, use this process to reset the consent status of terminated employees to ensure the printing of paper year-end forms.
- PDF year-end forms creation processes that generate year-end forms and slips.

Note: Payroll for North America uses BI Publisher to create year-end forms in PDF format for printing and to display the year-end forms in self-service. You must use the correct PDF year-end form creation process in conjunction with the ePay consent functionality. The processes print the forms only for employees who have not consented to electronic forms.

- Workflow email notification that year-end forms are ready for self-service viewing.

Initial Employee Notification About Consent

After you set up the consent processing, you must use your normal method of employee notification to inform employees that they can enter the self-service consent page to grant consent. The ePay application does not provide functionality for the initial notification to employees.

Consent Reset Due to Termination

The system does not automatically reset the consent status of terminated employees. The payroll administrator must run the Reset Form Consent process for terminated employees to ensure that paper forms will be printed at year end.

Note: The automatic notification of reset status is likely to be undeliverable to terminated employees. Use a standard procedure to notify the terminated employee of reset consent status, such as including the notification in the termination package.

See year-end processing instructions issued with the tax update posted on My Oracle Support in October each year.

Related Links

Delivered Workflows for ePay

Tax Form BI Publisher Options Page

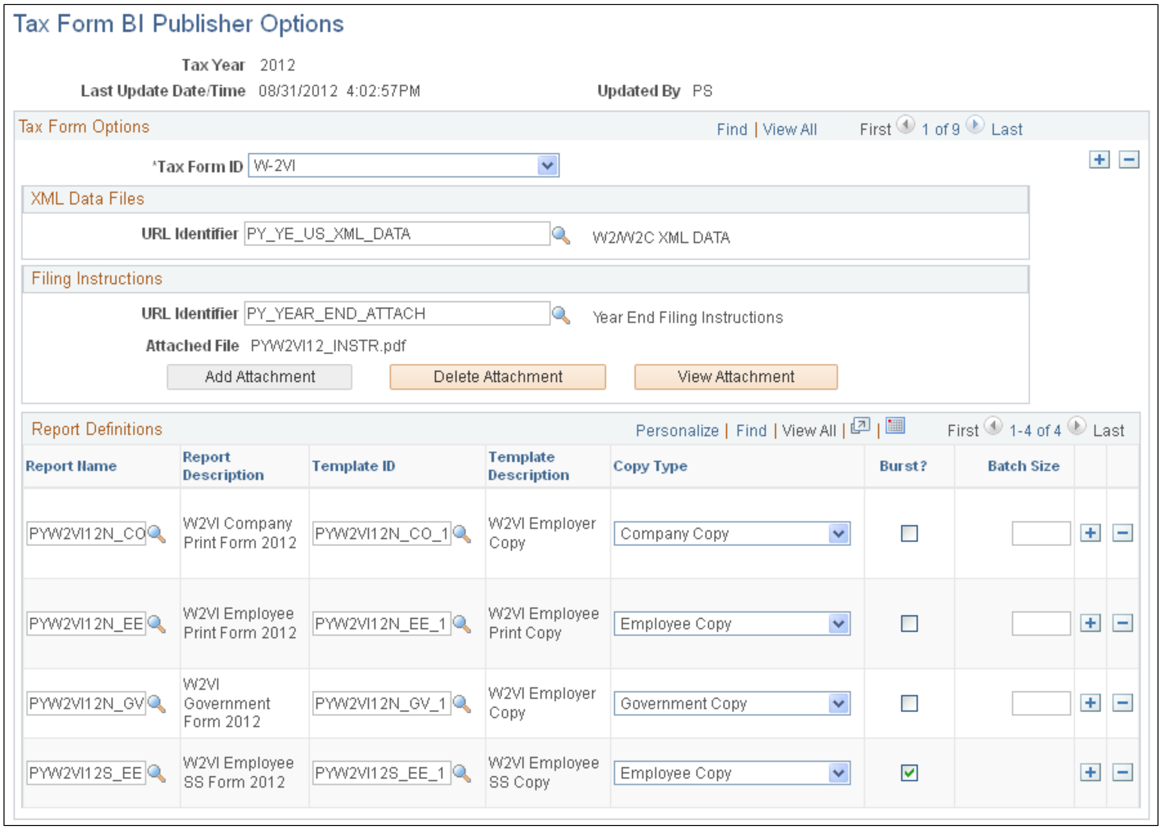
Use the Tax Form BI Publisher Options page to (PY_YE_XMLP_OPTION) to specify the tax year, the tax form, the report definitions, and the URL for the table in which the XML data is stored for producing the self-service forms.

Navigation

- (CAN) Payroll for North America > Year-End Processing CAN > Define Annual Tax Reporting > Tax Form BI Publisher Options > Tax Form BI Publisher Options
- (USA) Payroll for North America > U.S. Annual Processing > Define Annual Tax Reporting > Tax Form BI Publisher Options > Tax Form BI Publisher Options

Image: Tax Form BI Publisher Options page

This example illustrates the fields and controls on the Tax Form BI Publisher Options page.



XML Data Files

URL Identifier

Enter the URL to the table in which you store the XML data for self-service viewing. We deliver a URL and associated table for this purpose. If you create a separate table and URL to store the data, enter your URL here.

Report Definitions

Report Name

Select the appropriate print and self-service form report definitions for the tax year and tax form specified. PeopleSoft delivers the necessary report definitions and filing instructions each year for each tax form.

Batch Size

Enter the number of employees that you want in each PDF print file for those employees who do not give consent to receive their forms through self service.

See year-end processing instructions issued with the tax update posted on My Oracle Support in October of each year.

Year End Form Options Page

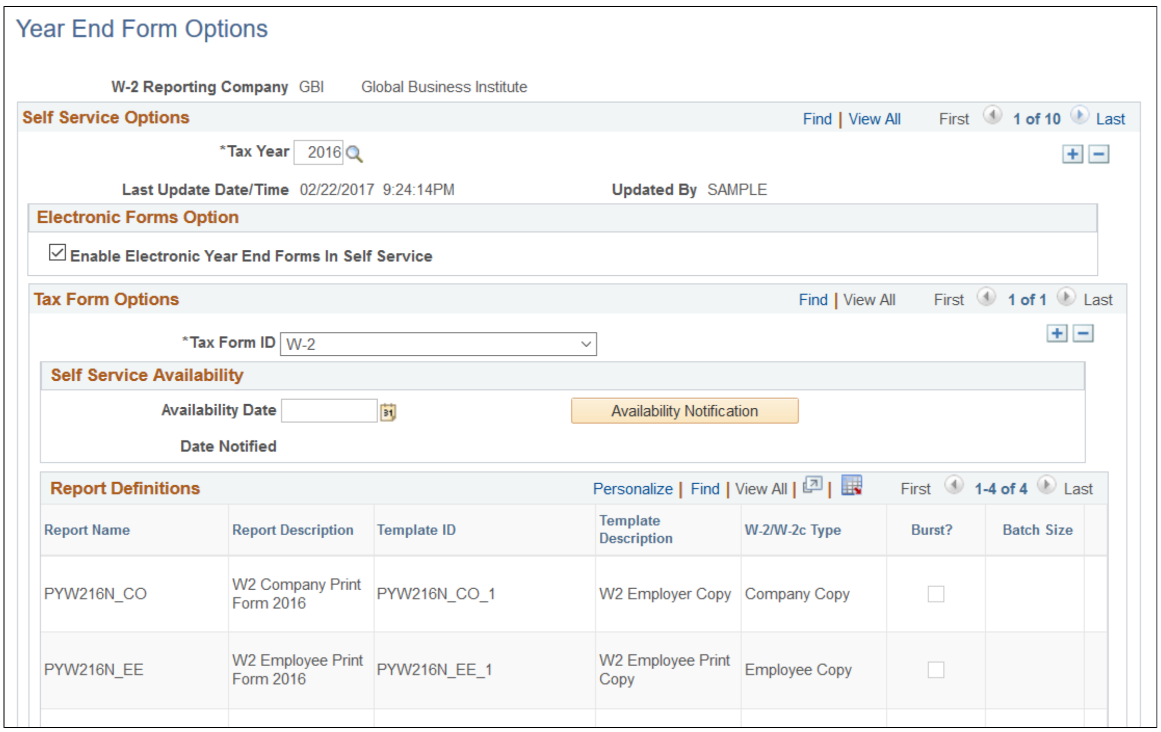
Use the Year End Form Options page (PY_YE_OPTION_CAN or PY_YE_OPTION_USA) to enable self-service year-end forms or slips. This step is required to enable employees to grant consent to receive electronic forms. Also specify the availability date for each form and tax year.

Navigation

- (CAN) Payroll for North America > Year-End Processing CAN > Define Annual Tax Reporting > Year End Form Options > Year End Form Options
- (USA) Payroll for North America > U.S. Annual Processing > Define Annual Tax Reporting > Year End Form Options > Year End Form Options

Image: Year End Form Options page

This example illustrates the fields and controls on the Year End Form Options page.



The Year End Form Options page configures printing of year-end forms in BI Publisher PDF format for the company specified. The output files are determined by the tax year and tax form ID.

Note: (USA) Configuration is by W-2 company for the U.S.

Tax Year	Create a new row each tax year.
(CAN) **Enable Electronic <Form Name> in Self Service** or (USA) **Enable Electronic Year End Forms in Self Service**	Select this check box to enable the W-2 company, T4/T4–A company, or RL-1/RL-2 company to provide the specified PDF forms or slips in the ePay self-service transaction. If a check box is not selected, employees cannot enter or withdraw consent or view the specified year-end forms and slips.

	If you want to disable the feature after employees have granted consent, deselect this check box and run the Reset W-2 Consent Status process (USA), the Reset T4/T4A Consent Status process (CAN) or the Reset RL-1/RL-2 Consent Status process (CAN). **Note:** (USA) Self-service year-end form functionality is available only for companies set up with tax report type *W-2 or Territories* on the Company Table - Default Settings: Tax Details page.
Tax Form ID	Enter all valid tax form IDs for the W-2 company, T4/T4–A company, or RL-1/RL-2 company.
Availability Date	After generating the individual PDF forms, enter an availability date when employees can view the forms in self-service.
Availability Notification	After entering an availability date, select this button to trigger workflow to send email notification of form availability to employees who are eligible to receive the electronic form. Set up the email text on the Year End Form Text page. **Note:** Before you select this button, verify that the availability date in the email notification is correct.
Date Notified	After you select the Availability Notification button and trigger the workflow email notification, the system enters the current date.
Report Definitions	Displays a list of valid report definitions based on the tax year and tax form ID entered. This is for information only. Maintain this information on the Tax Form BI Publisher Options page.

See year-end processing instructions issued with the tax update posted on My Oracle Support in October of each year.

Year End Form Text Page

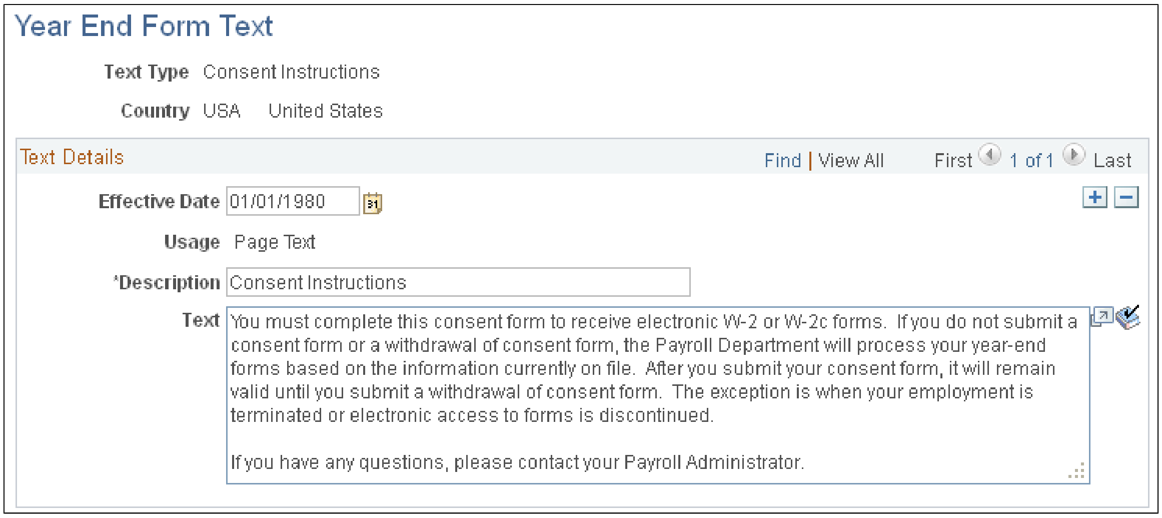
Use the Year End Form Text page (PY_YE_NOTES) to set up consent and notification text to be used on the consent page or in email notifications sent to employees.

Navigation

- (CAN) Payroll for North America > Year-End Processing CAN > Define Annual Tax Reporting > Year End Form Text > Year End Form Text
- (USA) Payroll for North America > U.S. Annual Processing > Define Annual Tax Reporting > Year End Form Text > Year End Form Text

Image: Year End Form Text page

This example illustrates the fields and controls on the Year End Form Text page.



Text Types

When you enter the page, select the type of consent form or email text that you want to enter or update. This table describes the text types:

Text Type	***Description***
Consent Instructions	Instructional text displayed on the W-2/W-2c Consent page, the T4/T4A Consent page , or the RL-1/RL-2 Consent page to request consent.
Withdrawal Instructions	Instructional text displayed on the W-2/W-2c Consent page, the T4/T4A Consent page, or the RL-1/RL-2 Consent page to withdraw consent.
Consent Confirmation	Email to an employee to confirm that consent is granted. Workflow issues this email when the employee submits a consent request through self service.
Withdrawn Confirmation	Email to an employee to confirm that consent is withdrawn. Workflow issues this email when the employee submits a consent withdrawal request through self service.
Consent Reset Notification	Notification to employees that consent has been reset. Workflow issues this email when the payroll administrator resets an employee's consent status or runs a mass reset process.

Text Type	Description
Form Available	Notification to employees that the W-2, T4/T4A, or RL-1/RL-2 form is available for self-service viewing and printing. Workflow issues this email when the payroll administrator selects the Availability Notification button on the Year End Form Options page.
Correction Available	Notification to employees that the W-2c or the amended T4, T4A, RL-1, or RL-2 is available for self-service viewing and printing. Workflow issues this email when the payroll administrator selects the Availability Notification button on the Year End Form Options page.

Additional Page Elements

Usage

Select *Page Text* for text types *Consent* or *Withdrawal.* Select *Email Text* for all other text types.

Text

Enter the exact wording of text to display in the email or consent form. Payroll for North America provides sample text for each text type for the U.S. and Canada. You can use the sample text as an example when you create your own text.

Note: Use the spell checking button or press Alt + 5 to check the spelling of your text.

Consent Instruction Requirements

The instructional page text that you create for consenting and withdrawing consent should include these details:

- Notification that a paper copy will be provided if consent is not given.
- The scope and duration of the consent.
- Post consent requests for paper statements.
- Option to withdraw consent.
- Conditions under which the employer will no longer furnish electronic statements.
- Procedures for updating information.
- Hardware and software requirements.

  For example, inform employees that Adobe Reader is required to view the forms.
- Contact information.

Review W-2/W-2c Consent Status Page

Use the Review W-2/W-2c Consent Status page (PY_FORM_STAT_USA) for USA, the Review T4/T4A Consent Status (PT_FORM_STAT_CAN) page for CAN, or the Review RL1/RL2 Consent Status (PY_FORM_STAT_MRQ) for CAN as appropriate to monitor employee consent status, and review the history of each employee's consent and email notification status.

Navigation

- (CAN) Payroll for North America > Year-End Processing CAN > Year-End/New Year Preparation > Review T4/T4A Consent Status > Review T4/T4A Consent Status
- (CAN) Payroll for North America > Year-End Processing CAN > Year-End/New Year Preparation >Review RL1/RL2 Consent Status >Review RL1/RL2 Consent StatusReview RL-1/RL-2 Consent Status
- (USA) Payroll for North America > U.S. Annual Processing > Year-End/New Year Preparation > Review W-2/W-2c Consent Status > Review W-2/W-2c Consent Status

Image: Review W-2/W-2c Consent Status page

This example illustrates the fields and controls on the Review W-2/W-2c Consent Status page.

Note: The Review T4/T4A Consent Status page and the Review RL1/RL2 Consent Status page is identical to the Review W-2/W-2c Consent Status page except for the page title.

Consent Status	Review the selected employee's consent status for each effective-dated row.
Email Notification Status	Review the email notifications that have been sent to the employee by workflow for each row of consent status.

Note: You can also generate the Year End Consent Status report to view a list of employees with the specified consent status values within a specified date range.

Viewing Year-End Forms

Pages Used to View Year-End Forms

Page Name	***Definition Name***	***Usage***
View T4/T4A Slips	PY_SS_YE_FORM_CAN PY_TAX_LIST_CAN	Canadian employees who have consented to electronic slips can view and print year-end slips and filing instructions, listed by tax year. The slip and filing instructions open in separate windows when the employee selects the corresponding document link. To resolve inquiries, the payroll administrator can view or reprint employees' self-service slips in an online Payroll for North America view that replicates the employees' self-service view. If the Final Print check box is selected, the employee can view the year-end form in self-service on or after the availability date if consent has been granted. If Final Print is not selected, only the payroll administrator can view the form.
View W-2/W-2c Forms	PY_SS_YE_FORM_USA PY_TAX_LIST_USA	U.S. employees can view and print year-end forms and filing instructions, listed by tax year. The form and filing instructions open in separate windows when the employee selects the corresponding document link. To resolve inquiries, the payroll administrator can view or reprint employees' self-service forms in an online Payroll for North America view that replicates the employees' self-service view. If the Final Print check box is selected, the employee can view the year-end form in self-service on or after the availability date. If Final Print is not selected, only the payroll administrator can view the form.

Prerequisites

These steps are required before employees can view and print electronic year-end forms and slips in self-service:

1. Configure Integration Broker and Report Manager.
2. Specify tax form BI Publisher options.

   See Year-end processing instructions issued with the tax update posted on My Oracle Support in October of each year.
3. Specify the year-end form options.

   On the Year End Form Options page, specify the tax year and the form availability date.

   See Year-end processing instructions issued with the tax update posted on My Oracle Support in October of each year.
4. Complete the employee consent process.

   See Managing Consent for Electronic Year-End Forms.
5. Create year-end form data and then create the forms using the PDF year-end form creation processes.

   Note: On the run control pages for the PDF year-end form creation processes, select the Final Print check box to enable employee self-service viewing as of the availability date specified on the Year End Form Options page. In Canada, self-service viewing is also subject to the consent status.

   See year-end processing instructions issued with the tax update posted on My Oracle Support in October of each year.

For more information, see the product documentation for:

- *PeopleTools: Integration Broker Service Operations Monitor*
- *PeopleTools: Process Scheduler*

(USA) Using the PeopleSoft Fluid User Interface to Manage Consent and View Electronic Year-End Forms

This topic discusses how employees use the PeopleSoft Fluid User Interface to manage consent and view electronic year-end forms for USA.

See also Managing Consent for Electronic Year-End Forms.

Pages Used to Manage Consent for Electronic Year-End Forms Using the PeopleSoft Fluid User Interface

Page Name	***Definition Name***	***Usage***
Payroll Tile	HC_PY_SS_NAVCOLL_FL (cref for the tile) PY_IC_WH_PTILE_FLU (page for dynamic data)	Access a collection of self-service payroll transactions.
W-2/W-2c Consent Page	PY_W2_CONSENT_FL	Request or withdraw consent to stop receiving paper W-2 and W-2c forms.
Verify Identity Page	N/A	Authenticate the changes.
View W-2/W-2c Forms Page	PY_SS_YEW2_FORM_FL	View and print W-2 and W-2c forms, listed by tax year.

Understanding Year End Consent Pages

Employees can submit or withdraw consent to receive year-end forms electronically using Fluid Self-Service.

To update the consent:

1. Access the Payroll page using Payroll tile.
2. Select the required consent page from the left navigation pane and select the check box to indicate that consent is being submitted or withdrawn.
3. Once you select the Submit button, the Verify Identity Page appears for authentication.
4. Enter your PeopleSoft user ID and password for identity verification and select the Continue button.

   The system updates the employee's consent status, displays a confirmation page, and sends the employee a confirmation email. The confirmation email is sent to the employee's preferred email address as indicated in the employee's personal data record. If the employee does not have a preferred email address, the consent status is still updated, but a message informs the employee that no email will be sent.

Note: If an employee has an invalid email address (such as an email address with invalid characters), the system does not update the employee's consent. A message informs the employee that consent cannot be updated until a valid email address is on file.

User Roles

NA Payroll Fluid W2 User This role is required to view the W-2/W-2c Forms folder which includes the W-2/W-2c view forms and consent forms.

Push Notification

Push notifications are generated when the year-end forms are made available to the Employee Self Service users from Year End Options page.

W-2/W-2c Consent Page

Use the W-2/W-2c Consent page (PY_W2_CONSENT_FL) to submit or withdraw consent to stop receiving paper W-2 and W-2c forms.

Navigation

From the Employee Self-Service home page, click the Payroll tile to access the Payroll page. Then select W-2/W-2c Consent from the left navigation pane.

Image: W-2/W-2c Consent Page

This example illustrates the W-2/W-2c Consent page for employees who are currently receiving paper forms.

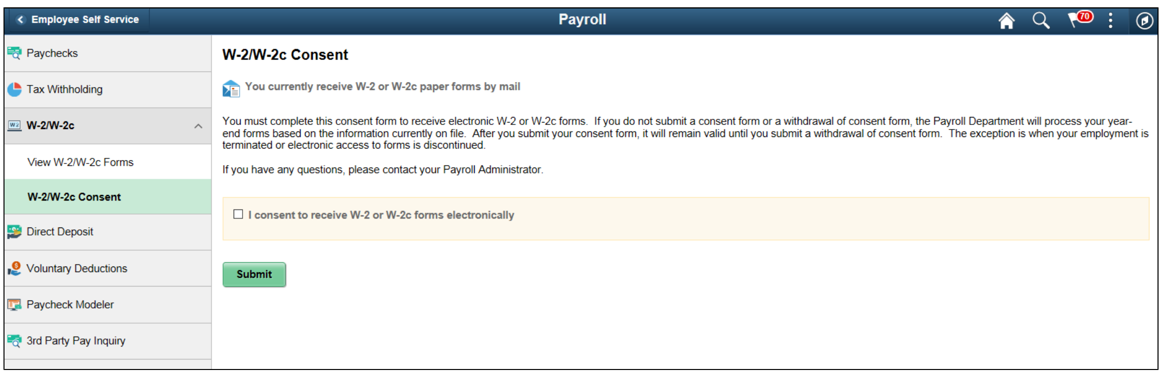


Image: (Smartphone) W-2/W-2c Consent page

This example illustrates the W-2/W-2c Consent page for employees who are currently receiving paper forms.

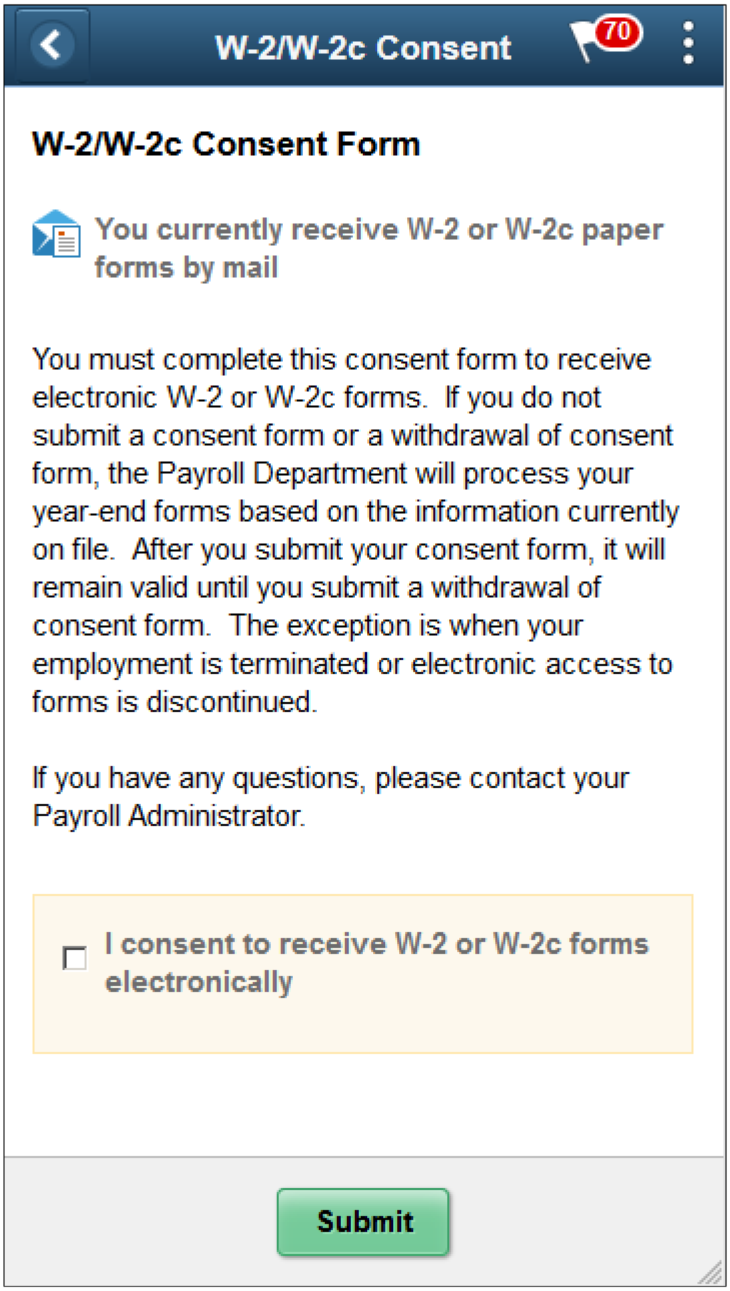
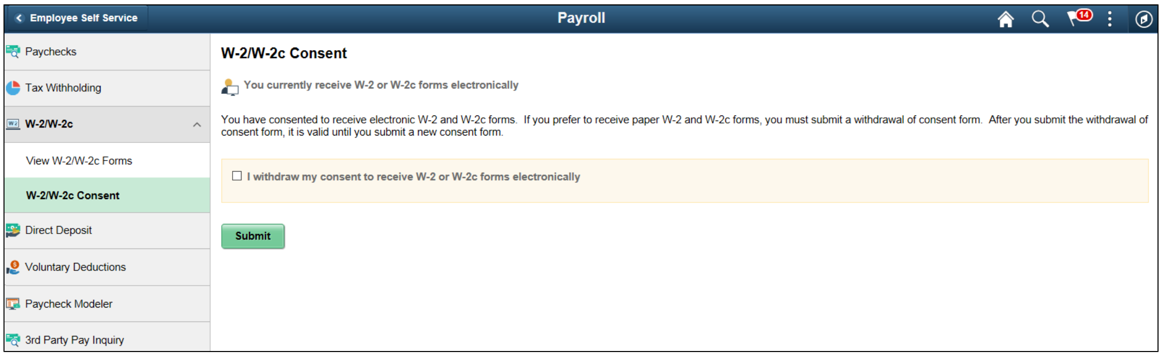


Image: W-2/W-2c Consent Withdrawal Page

This example illustrates the W-2/W-2c Consent Withdrawal page for employees currently receiving electronic forms.



Changing Consent

These page elements appear when an employee accesses the page.

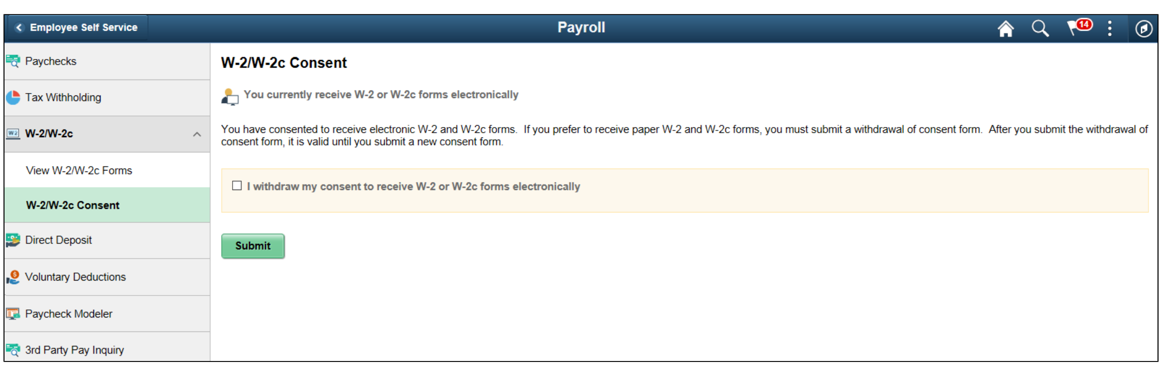
I consent to receive the W-2 and W-2c forms electronically.	This check box appears if the employee currently receives paper forms by mail. The employee selects this box to give consent to receive the forms electronically and stop receiving paper forms.
I withdraw my consent to receive W-2 and W-2c forms electronically.	This check box appears if the employee currently receives their year-end forms electronically. The employee selects this box to withdraw consent and receive paper W-2 and W-2c forms.
Submit	Select this button to submit the changes. On selecting the button, the Verify Identity Page

Confirmation Information

The W-2/W-2c Consent page displays confirmation information once the employees verify their identity and complete the process of submitting or withdrawing consent.

Image: W-2/W-2c Consent page after a change is submitted

This example illustrates the W-2/W-2c Consent page after an employee has submitted consent to receive year-end forms electronically.



Verify Identity Page

Use the Verify Identity page to enter their password to confirm their consent for electronic year-end forms.

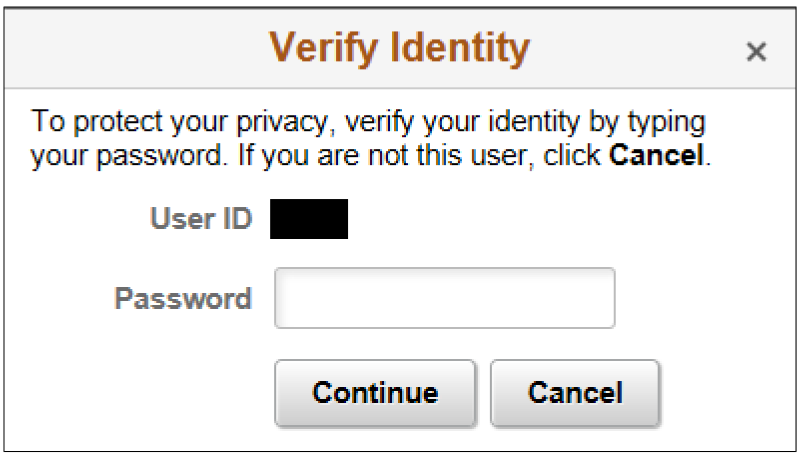
Navigation

This example illustrates the W-2/W-2c Consent page after an employee has submitted consent to receive year-end forms electronically.

Click the Submit button on the selected Consent page.

Image: Verify Identity page

This example illustrates the fields and controls on the Verify Identity page.



Employees verify their identity by entering their PeopleSoft password and then clicking the Continue button.

After the employee's identity is verified, the employee's new consent status is saved.

View W-2/W-2c Forms Page

Use the View W-2/W-2c Forms page (PY_SS_YEW2_FORM_FL) to view the W-2/W-2c forms in Employee Self Service.

Note: Employees can submit or withdraw consent to stop receiving paper W-2 and W-2c forms using W-2/W-2c Consent Page.

Navigation

From the Employee Self-Service home page, click the Payroll tile to access the Payroll page. Then click the W-2/W-2c Forms option and select View W-2/W-2c Forms from the left navigation pane.

Image: (Desktop) View W-2/W-2c Forms page

This example illustrates the View W-2/W-2c Forms Page when the employee has given the consent.

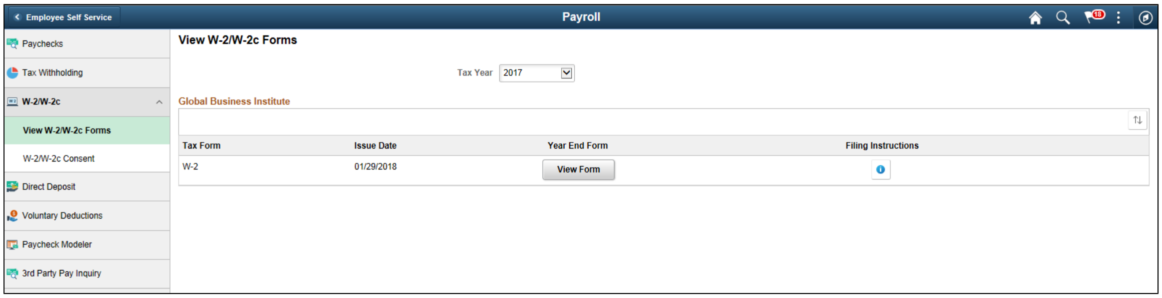
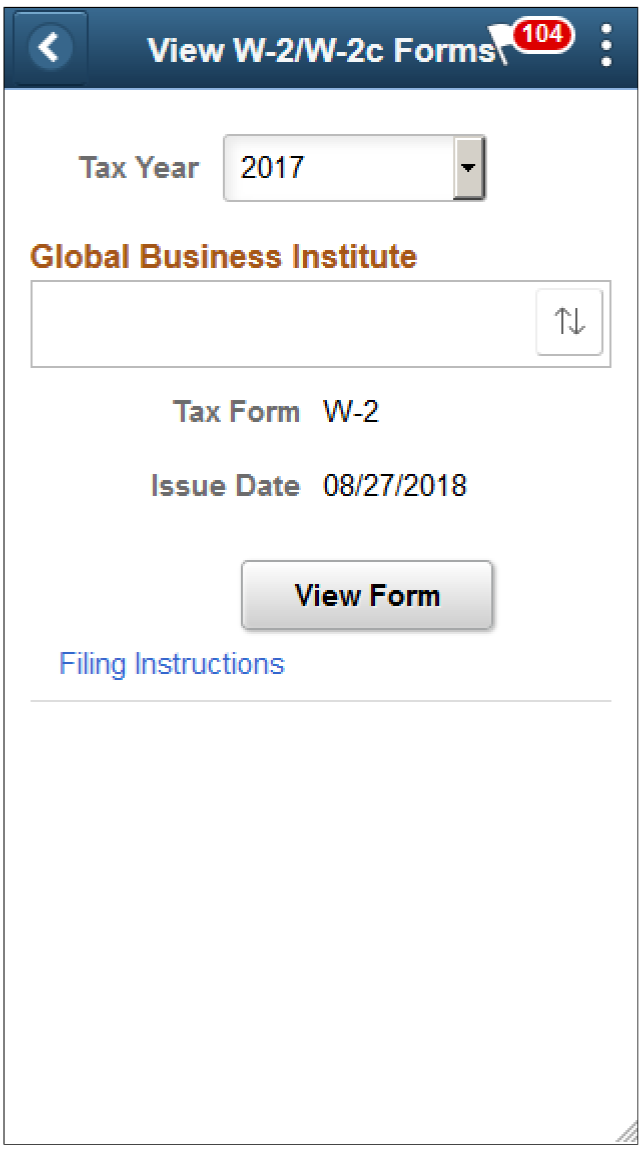
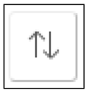


Image: (Smartphone) View W-2/W-2c Forms page

This example illustrates the fields and controls on the View W-2/W-2c Forms page.



View Tax Year	Employees can view and print year-end forms and filing instructions, listed by tax year.



Employees can sort the list based on Tax Form, Issue Date and Company. Company will be available in the sort option only if multiple companies are available for the same tax year.

View Form

Click the View Form button to view and print the year-end form.

Note: In accessibility mode, the system displays the W-2 forms on a PeopleSoft page (and not in a PDF file) if the corresponding accessibility year-end set up is available for the selected year. This page will be displayed based on the set up defined in Year End Accessibility Set Up page. For more information see Year End Accessibility Setup Page

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View Details

View Details button appears for employees with multiple forms. Select the button to open View Details page.

Image: View W-2 Details Page

This example illustrates the View W-2 Details Page.

Year End Accessibility for Self Service Users

This topic provides an overview of the accessibility feature enabled for year end tax forms (USA).

Note: Currently this feature is enabled for Forms W-2, W-2c, W-2AS, W-2GU, W-2VI, W-2cAS, W-2cGU and W-2cVI.

Page Used to Set up Year End Accessibility

Page Name	Definition Name	Usage
Year End Accessibility Setup Page	TAXFORM_ACC_SETUP	In the Self Service accessibility page for Year End Forms (USA), the following configurations are delivered by Payroll for North America: • Map the valid boxes with the corresponding XML tag • Define the display/processing logic • Define override description

Self-Service for Accessibility Users

In accessibility mode, the system displays the selected tax forms on a PeopleSoft page. This feature is available only if the corresponding year end accessibility set up is defined for the selected year using the Year End Accessibility Setup page.

You can also view and print the year-end forms in PDF format in addition to the online page. For example, to view the W-2 or W-2c forms in pdf format use the Printable W-2 or Printable W-2c button.

Note: Accessibility set up is available from the year 2012 onwards.

Year End Accessibility Setup Page

In the Self Service accessibility page for Year End Forms (USA), the following configurations are delivered by Payroll for North America:

- Map the valid boxes and codes with the corresponding XML tag from the corresponding Taxform Definition
- Define the display/processing logic
- Define override description

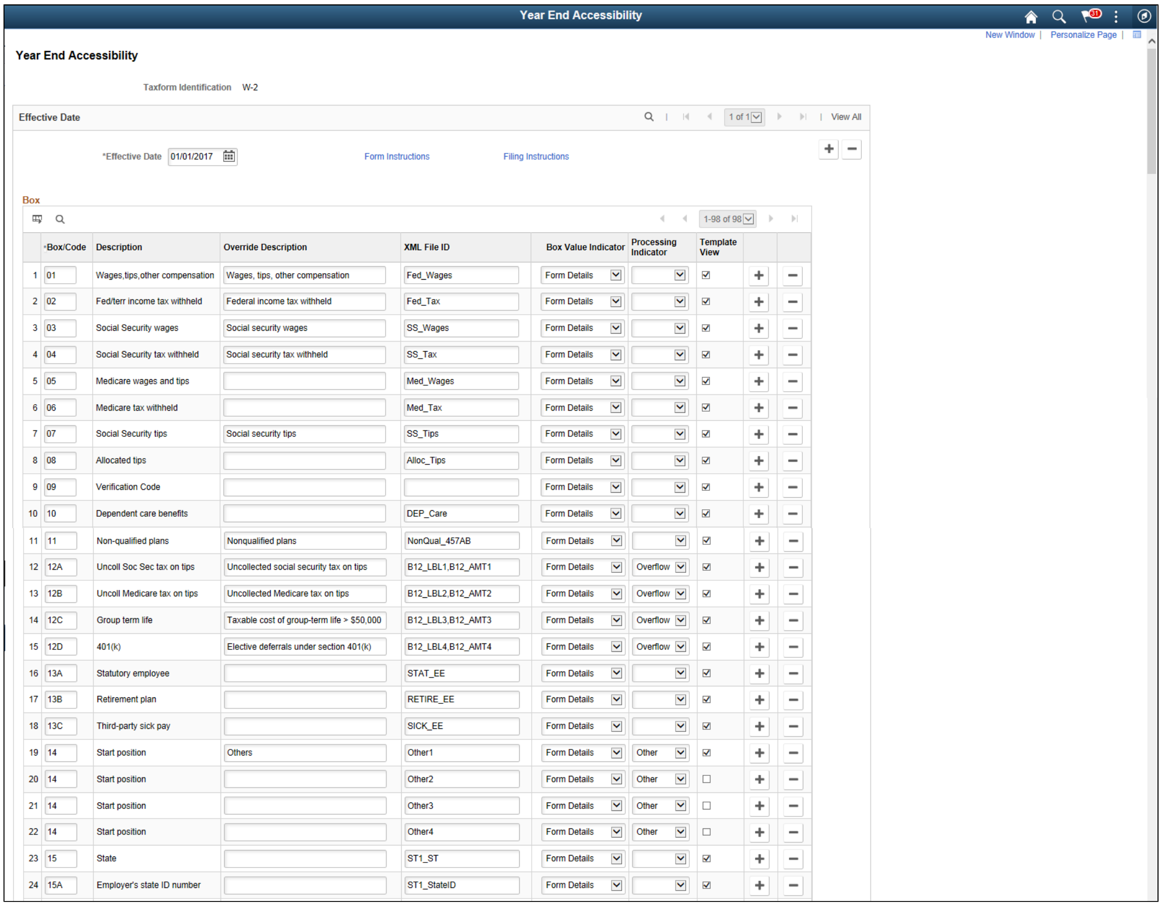
Note: Oracle recommends that you modify only the override description and form instructions.

Navigation

Payroll for North America >U.S. Annual Processing >Define Annual Tax Reporting >Year End Accessibility

Image: Year End Accessibility Setup Page

This example illustrates the fields and controls on the Year End Accessibility Setup Page for W-2. You can find definitions for the fields and controls later on this page.



Taxform Identification

Displays the selected tax form. Here, for example we have selected W-2.

Box/Code

Based on the selected tax form and year, system populates the corresponding Box/Codes from the Tax Form Definitions Page along with the description.

Description

The description defined for the corresponding Box/Code in the *Tax Form Definitions Page* is automatically populated here.

Note: In accessibility mode it is important to give a proper description to the Box/Code for the screen reader to interpret. If you need to override the delivered description, use the Override Description field to enter an alternate or new description.

Override Description

Enter the description to be displayed in the View Year End Form page (accessibility mode). If this field is left blank, the default description will be displayed.

XML File ID

XML File ID is the mapping between the Box/Code and the XML tag in the XMLP template for the corresponding Taxform Definition.

Box Value Indicator

This field indicates the mapping of the Box/Code to the corresponding section in View Year End Form page (accessibility mode).

The options listed below are applicable to W-2, W-2AS, W-2GU and W-2VI forms.

- Employee Details: This option is used to map the Box/Code to the Employee Details section.
- Employer Details: This option is used to map the Box/Code to the Employer Details section. This section specifies the address, company name and details about the employer.
- Form Details: This option is used to map the Box/Code to the Form Details section. This section specifies information specific to the tax form.

The options listed below are applicable to W-2c, W-2cAS, W-2cGU and W-2cVI forms.

- Employee Correction: This option is used to map the Box/Code to the Corrected Employee Information section. This section specifies the previously reported and corrected employee information.
- Federal: This option is used to map the Box/Code to the Corrected Federal Information section. This section specifies the previously reported and corrected information.
- Local: This option is used to map the Box/Code to the Corrected Local information section (For example: Locality Wages, Locality Name and Locality Tax). This section specifies the previously reported and corrected information.
- State: This option is used to map the Box/Code to Corrected State information(For example: State Wages and State Income Tax.). This section specifies the previously reported and corrected information.

In the View Year End Form page (accessibility mode), the Box/Code details will be displayed in each section based on this mapping.

Processing Indicator

This field indicates the processing type for each Box/Code. Available options are:

- Correction: This process indicator is used to append box values together. Currently this is used along with the Box indicator "Employee Correction", where we append the Employee’s first name, last name and suffix together.

Note: Currently this process indicator is applicable only to W-2c, W-2cAS, W-2cGU and W-2cVI forms.

- Normal: This is the default behavior when one to one mapping of the XML ID is available.
- Other: If the Box/Code description and value is in the same XML tag, then the Processing Indicator will be ‘Other’. Currently this is applicable for Box 14.

  Note: In the Self Service accessibility page, Box 14 does not display long descriptions. It displays Box/Code values only.

- Overflow: For single Box/Code if XML is having two fields, one for label and another for value, processing indicator will be overflow. System will be identifying first tag value as box code and second tag value as the corresponding value. Currently this is applicable for Box 12.

Note: By default, normal processing is followed if this field is left blank.

Template View

In the View Year End Form page (accessibility mode), only the Box/Code with form values will be displayed by default.

If Template View is selected for a Box/Code, on selecting ‘View All Boxes’ option in the View Form Page, Box/Code details will be populated even if form value is not present.

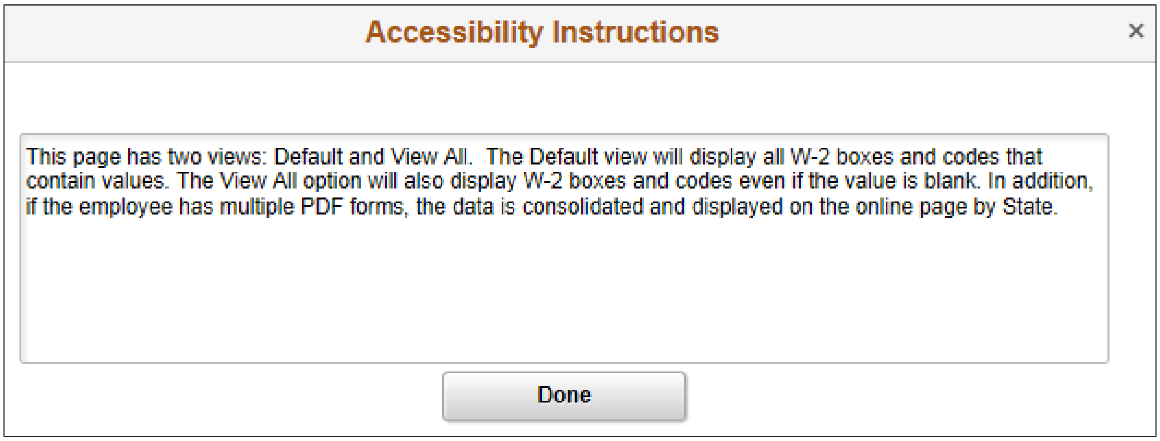
Form Instructions

Form Instructions defined in Year End Accessibility Setup Page is displayed as accessibility instructions in the View Form page (accessibility mode). This is the standard accessibility instructions PeopleSoft delivers. If required, the user can modify the instructions.

Click the Form Instructions link in the Year End Accessibility page to view or update the accessibility instructions.

Image: Accessibility Instructions Page

This example illustrates the Accessibility Instructions.

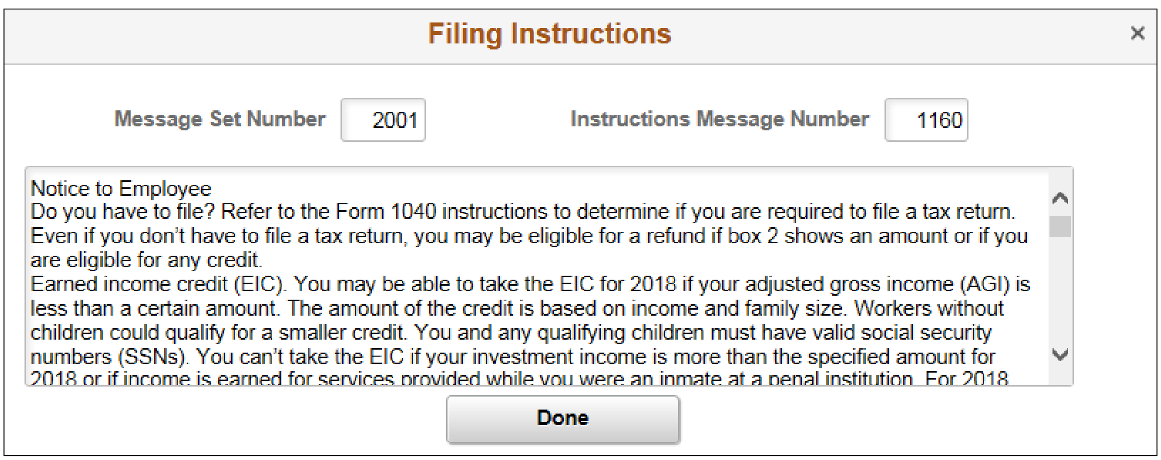


Filing Instructions

Filing instructions are managed through message catalogs. Click the Filing Instructions link in the Year End Accessibility page to view the filing instructions.

Image: Filing Instructions

This example illustrates the Filing Instructions.

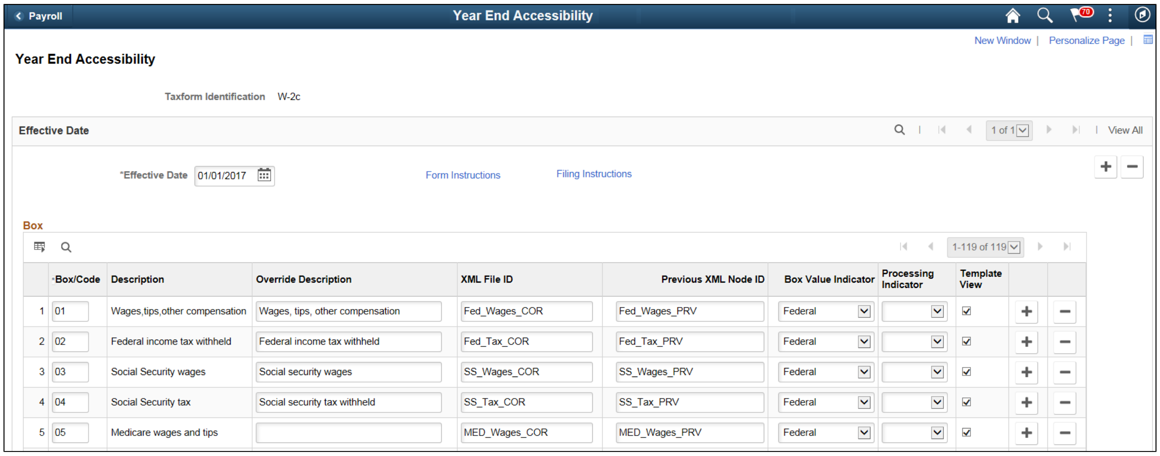


Year End Accessibility Setup Page for W-2c

Select W-2c in the Tax Form Identification field to setup Self-Service accessibility mapping for corrected W-2 Forms. This setup of W-2c also handles accessibility mapping for W-2c territories like W-2AS, W-2GU and W-2VI.

Image: Year End Accessibility Setup Page for W-2c

This example illustrates the fields and controls on the Year End Accessibility Setup Page for W-2c. You can find definitions for the fields and controls later on this page.



Taxform Identification

Displays the selected tax form. Here, we have selected W-2c.

Box/Code

Based on the selected tax form and year, system populates the corresponding Box/Codes from the Tax Form Definitions Page along with the description.

Description

The description defined for the corresponding Box/Code in the *Tax Form Definitions Page* is automatically populated here.

Note: In accessibility mode it is important to give a proper description to the Box/Code for the screen reader to interpret. If you need to override the delivered description, use the Override Description field to enter an alternate or new description.

Override Description

Enter the description to be displayed in the View Year End Form page (accessibility mode). If this field is left blank, the default description will be displayed.

XML File ID

XML File ID is the mapping between the Box/Code and the XML tag in the XMLP template for the corresponding Taxform Definition.

Previous XML Node ID

Displays the XML File ID before correction.

Box Value Indicator

This field indicates the mapping of the Box/Code to the corresponding section in View Year End Form page (accessibility mode).

The options listed below are applicable to W-2c, W-2cAS, W-2cGU and W-2cVI forms.

- Employee Correction: This option is used to map the Box/Code to the Corrected Employee Information section. This section specifies the previously reported and corrected employee information.

- Federal: This option is used to map the Box/Code to the Corrected Federal Information section. This section specifies the previously reported and corrected information.
- Local: This option is used to map the Box/Code to the Corrected Local information section (For example: Locality Wages, Locality Name and Locality Tax). This section specifies the previously reported and corrected information.
- State: This option is used to map the Box/Code to Corrected State information(For example: State Wages and State Income Tax.). This section specifies the previously reported and corrected information.

The options listed below are applicable to W-2, W-2AS, W-2GU and W-2VI forms.

- Employee Details: This option is used to map the Box/Code to the Employee Details section.
- Employer Details: This option is used to map the Box/Code to the Employer Details section. This section specifies the address, company name and details about the employer.
- Form Details: This option is used to map the Box/Code to the Form Details section. This section specifies information specific to the tax form.

In the View Year End Form page (accessibility mode), the Box/Code details will be displayed in each section based on this mapping.

Processing Indicator

This field indicates the processing type for each Box/Code. Available options are:

- Correction: This process indicator is used to append box values together. Currently this is used along with the Box indicator "Employee Correction", where we append the Employee’s first name, last name and suffix together.

  Note: Currently this process indicator is applicable only to W-2c, W-2cAS, W-2cGU and W-2cVI forms.

- Normal: This is the default behavior when one to one mapping of the XML ID is available.
- Other: If the Box/Code description and value is in the same XML tag, then the Processing Indicator will be ‘Other’. Currently this is applicable for Box 14.

  Note: In the Self Service accessibility page, Box 14 does not display long descriptions. It displays Box/Code values only.

- Overflow: For single Box/Code if XML is having two fields, one for label and another for value, processing indicator will be overflow. System will be identifying first tag value as box code and second tag value as the corresponding value. Currently this is applicable for Box 12.

Note: By default, normal processing is followed if this field is left blank.

Template View

In the View Year End Form page (accessibility mode), only the Box/Code with form values will be displayed by default.

If Template View is selected for a Box/Code, on selecting 'View All Boxes' option in View Form Page, Box/Code details will be populated even if form value is not present.

Form Instructions

Form Instructions defined in Year End Accessibility Setup Page is displayed as accessibility instructions in the View Form page (accessibility mode). This is the standard accessibility instructions PeopleSoft delivers. If required, user can modify the instructions.

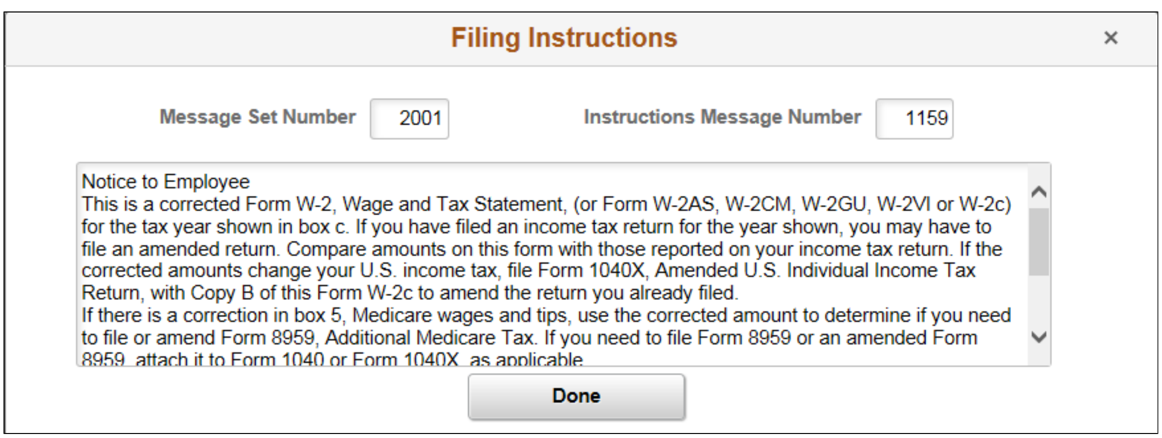
Click the Form Instructions link in the Year End Accessibility page to view or update the accessibility instructions.

Filing Instructions for W-2c

Filing instructions are managed through message catalogs. Click the Filing Instructions link in the Year End Accessibility page to view the filing instructions.

Image: Filing Instructions for W-2c

This example illustrates the Filing Instructions for W-2c.



View W-2/W-2c Forms Page in Accessibility Mode

Use View W-2/W-2c Forms Page in accessibility mode to view the selected tax forms on a PeopleSoft page (and not in a PDF file).

Note: This feature is available only if the corresponding year end accessibility set up is defined for the selected year. For more information, see Year End Accessibility Setup Page

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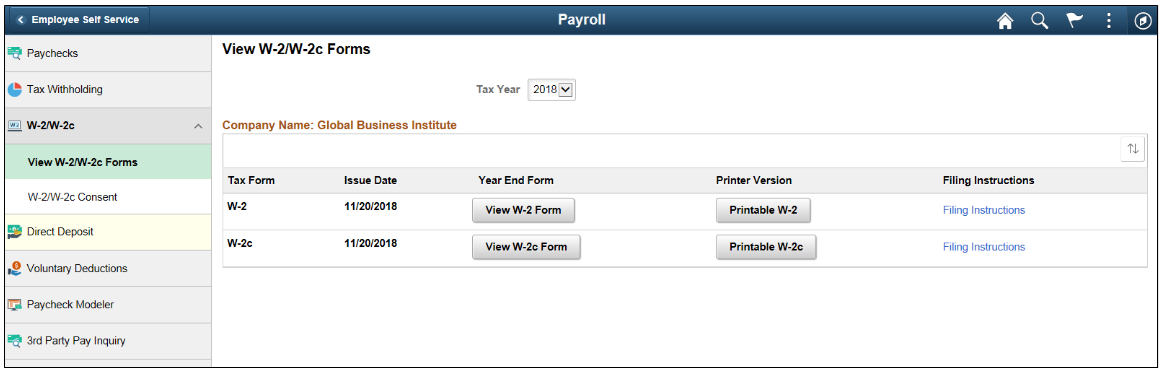
If required, you can also view the year-end form in pdf format.

Navigation

From the Employee Self-Service home page, click the Payroll tile to access the Payroll page. Then click the W-2/W-2c Forms option and select View W-2/W-2c Forms from the left navigation pane.

Image: View W-2/W-2c Forms Page in Accessibility Mode

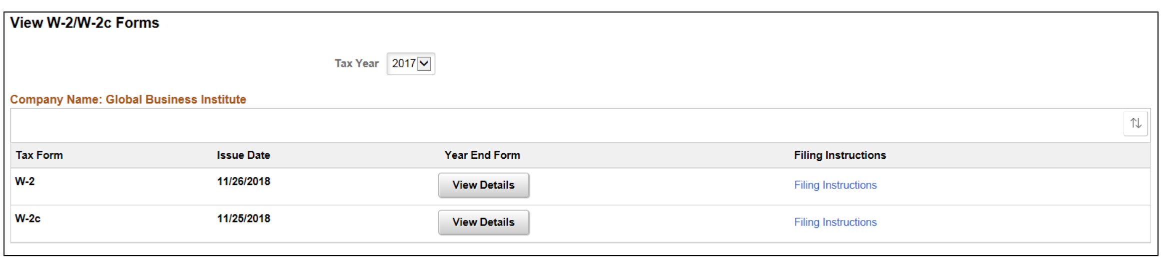
This example illustrates the View W-2/W-2c Forms Page in Accessibility Mode.



The View W-2/W-2c Forms page displays View Details button for employees with multiple forms.

Image: View W-2/W-2c Forms Page in Accessibility Mode for employees with multiple forms

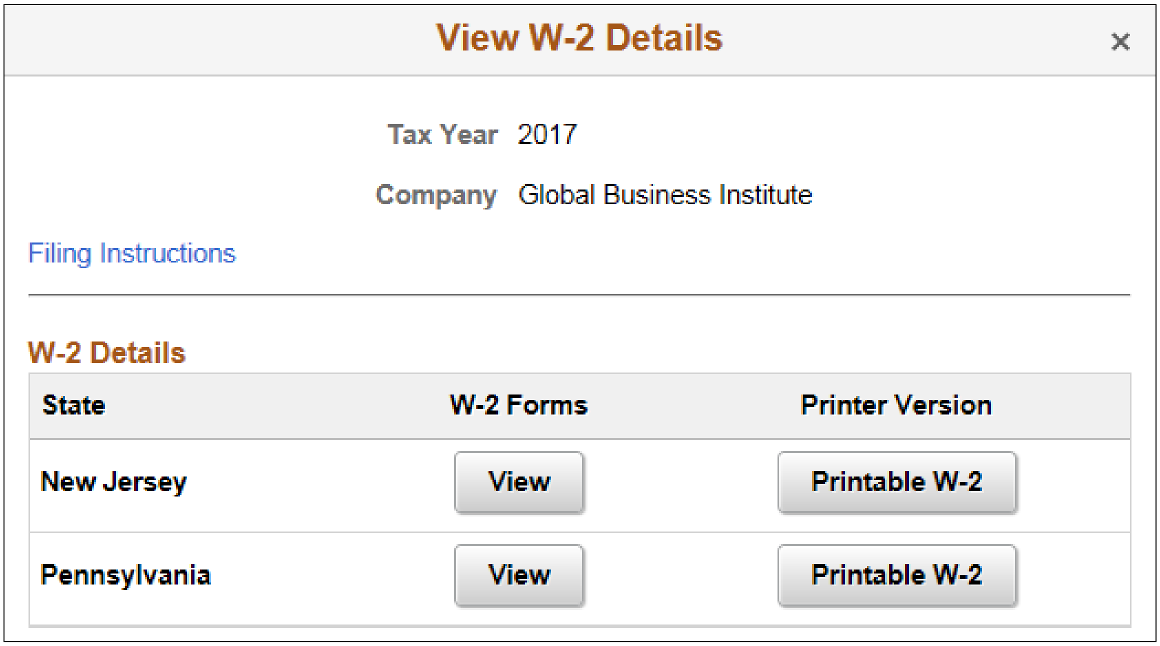
This example illustrates the View W-2/W-2c Forms Page in Accessibility Mode for employees with multiple forms.



Select the View Details button corresponding to W-2 tax form to open the View W-2 Details page.

Image: View W-2 Details Page

In this example, the employee has two W-2s. One for New Jersey and one for Pennsylvania.



Click View button to open the W-2 form in accessibility mode.

Image: (Smartphone) View W-2 Form Page in accessibility mode

This example illustrates the View W-2 Form Page in accessibility mode for the smartphone.

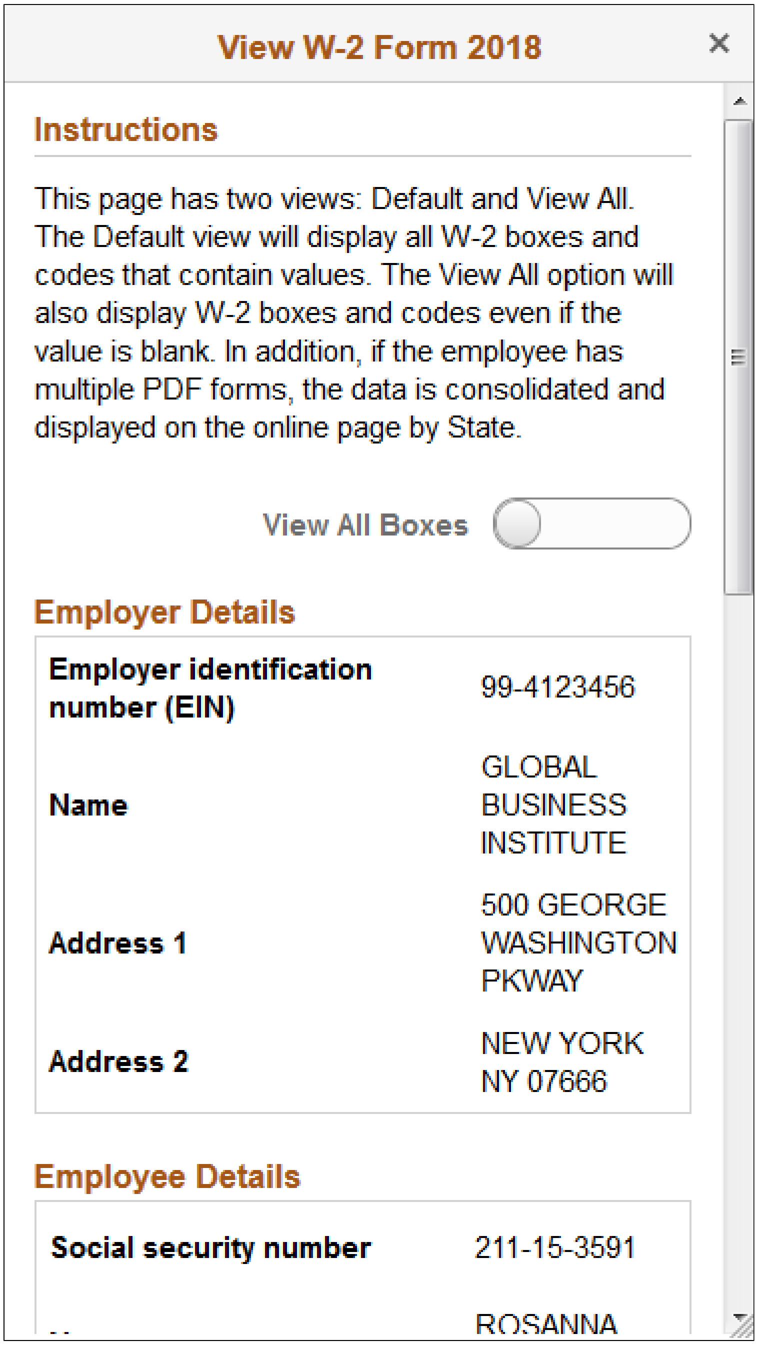
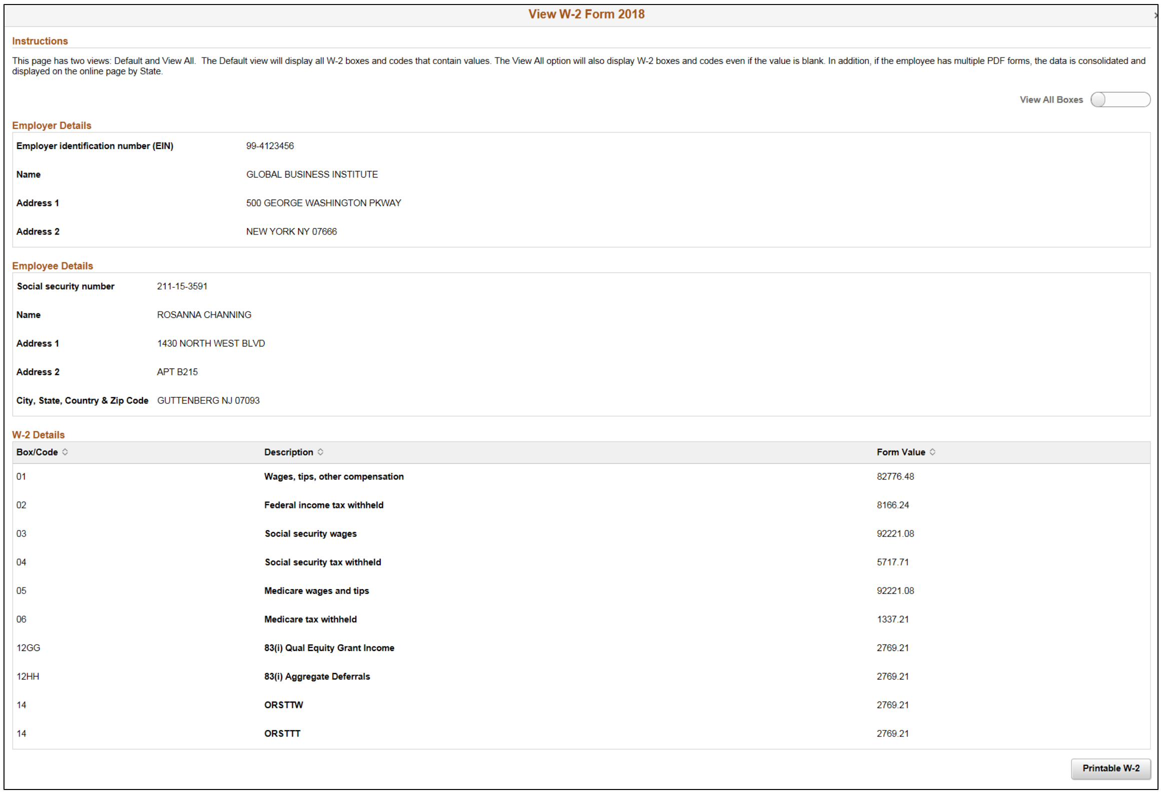


Image: (Desktop) View W-2 Form Page in accessibility mode

This example illustrates the View W-2 Form page in accessibility mode for the desktop.


View W-2 Form 2018

Instructions

This page has two views: Default and View All. The Default view will display all W-2 boxes and codes that contain values. The View All option will also display W-2 boxes and codes even if the value is blank. In addition, if the employee has multiple PDF forms, the data is consolidated and displayed on the online page by State.

View All Boxes

Employer Details

Employer identification number (EIN)	99-4123456
Name	GLOBAL BUSINESS INSTITUTE
Address 1	500 GEORGE WASHINGTON PKWAY
Address 2	NEW YORK NY 07666

Employee Details

Social security number	211-15-3591
Name	ROSANNA CHANNING
Address 1	1430 NORTH WEST BLVD
Address 2	APT B215
City, State, Country & Zip Code	GUTTENBERG NJ 07093

W-2 Details

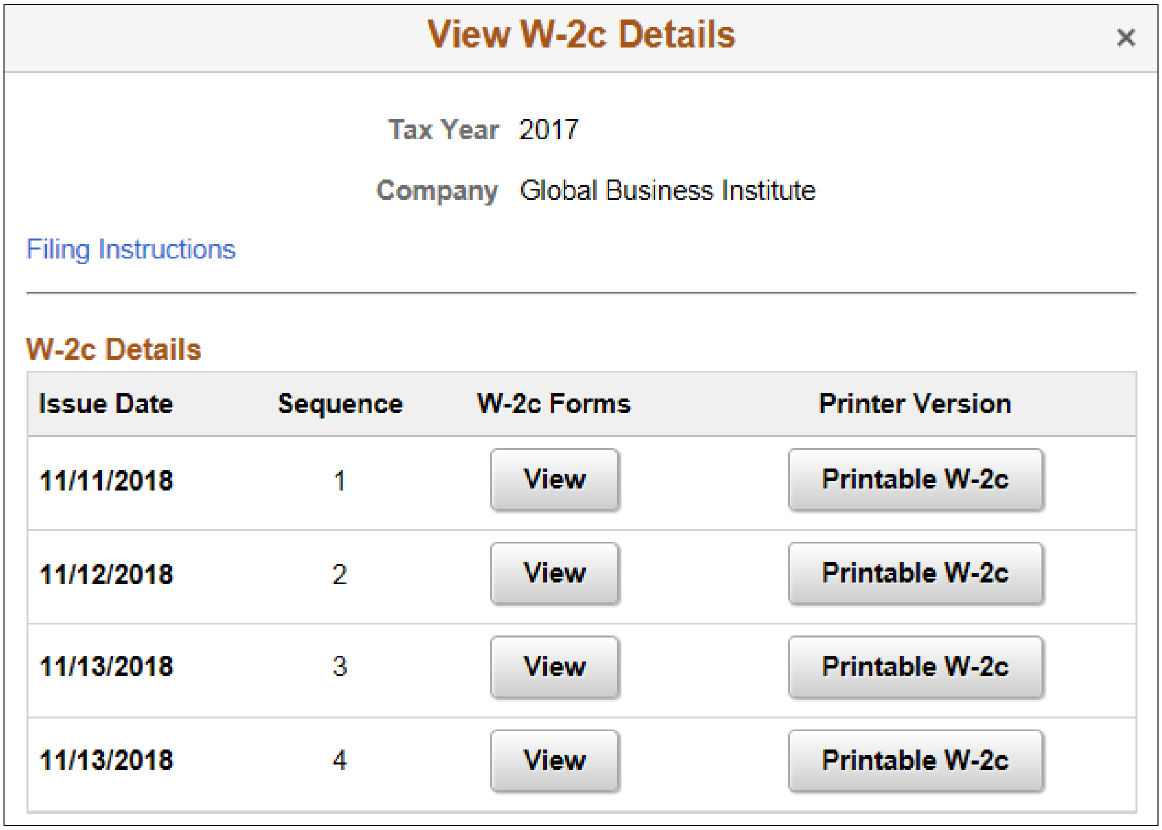
Box/Code	Description	Form Value
01	Wages, tips, other compensation	82776.48
02	Federal income tax withheld	8166.24
03	Social security wages	92221.08
04	Social security tax withheld	5717.71
05	Medicare wages and tips	92221.08
06	Medicare tax withheld	1337.21
12GG	83(i) Qual Equity Grant Income	2769.21
12HH	83(i) Aggregate Deferrals	2769.21
14	ORSTTW	2769.21
14	ORSTTT	2769.21

Printable W-2

In the View W-2/W-2c Forms Page, select the View Details button corresponding to W-2c tax form to open the View W-2c Details page.

Image: View W-2c Details Page

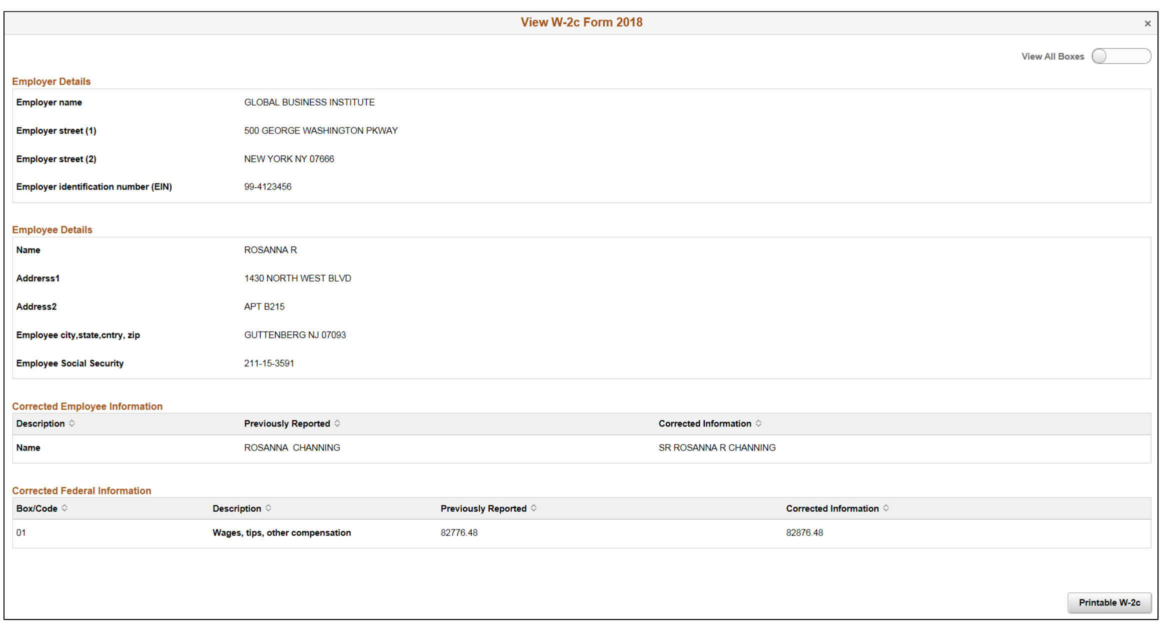
In this example, the employee has four W-2c that were processed on various days.



Click View button to open the W-2c form in accessibility mode.

Image: View W-2c Form Page in Accessibility Mode

This example illustrates the View W-2c Form page in accessibility mode.



This page is displayed based on the configuration defined in the Year End Accessibility Setup Page

View All Boxes	Select this push button to show all the Box/Code which are selected as Template View in the Year End Accessibility page. **Note:** If this push button is not selected only the Box/Code with form values will be displayed by default.
Printable W-2/ Printable W-2c	Click this button to view the PDF file.

(CAN) Using the PeopleSoft Fluid User Interface to Manage Consent for Electronic Year-End Forms

This topic discusses how employees use the PeopleSoft Fluid User Interface to manage consent for electronic year-end forms for Canada.

See also Managing Consent for Electronic Year-End Forms.

The following video provides an overview of Fluid Year-End Forms T4 and T4-A for Canada:

Fluid Year-End Forms T4 and T4-A for Canada

The following video provides an overview of Fluid Year-End Forms RL-1 and RL-2 for Quebec:

Fluid Year-End Forms RL-1 and RL-2 for Quebec

Pages Used to Manage Consent for Electronic Year-End Forms Using the PeopleSoft Fluid User Interface

Page Name	*Definition Name*	*Usage*
Payroll Tile	HC_PY_SS_NAVCOLL_FL (cref for the tile) PY_IC_WH_PTILE_FLU (page for dynamic data)	Access a collection of self-service payroll transactions.
T4/T4A Consent Page	PY_T4_CONSENT_FL	Request or withdraw consent to stop receiving paper T4 and T4A slips.
View T4/T4A Slips Page	PY_SS_YET4_FORM_FL	View and print T4/T4A slips, listed by tax year.
Verify Identity Page	N/A	Authenticate the changes.
RL-1/RL-2 Consent page	PY_RL_CONSENT_FL	Request or withdraw consent to stop receiving paper RL-1 and RL-2 slips.

Page Name	Definition Name	Usage
View RL-1/RL–2 Slips Page	PY_SS_YE_RL_VW_FL	View and print RL-1/RL–2 slips, listed by tax year.

Understanding Year End Consent Pages

Employees can submit or withdraw consent to receive year-end forms electronically using Fluid Self-Service.

To update the consent:

1. Access the Payroll page using Payroll tile.
2. Select the required consent page from the left navigation pane and select the check box to indicate that consent is being submitted or withdrawn.
3. Once you select the Submit button, the Verify Identity Page appears for authentication.
4. Enter your PeopleSoft user ID and password for identity verification and select the Continue button.

   The system updates the employee's consent status, displays a confirmation page, and sends the employee a confirmation email. The confirmation email is sent to the employee's preferred email address as indicated in the employee's personal data record. If the employee does not have a preferred email address, the consent status is still updated, but a message informs the employee that no email will be sent.

Note: If an employee has an invalid email address (such as an email address with invalid characters), the system does not update the employee's consent. A message informs the employee that consent cannot be updated until a valid email address is on file.

User Roles

NA Payroll Fluid T4 User — This role is required to view the T4/T4A folder which includes the T4/T4A view slips and consent forms.

NA Payroll Fluid RL User — This role is required to view the RL-1/RL-2 folder which includes the RL-1/Rl-2 view slips and consent forms.

Push Notification

Employees receive push notification when year-end forms are generated.

T4/T4A Consent Page

Use the T4/T4A Consent page (PY_T4_CONSENT_FL) to submit or withdraw consent to stop receiving paper T4 and T4A slips.

Navigation

From the Employee Self-Service home page, click the Payroll tile to access the Payroll page. Then select T4/T4A Consent from the left navigation pane.

Image: (Desktop) T4/T4A Consent page

This example illustrates that T4/T4A Consent page for employees who are currently receiving paper forms.

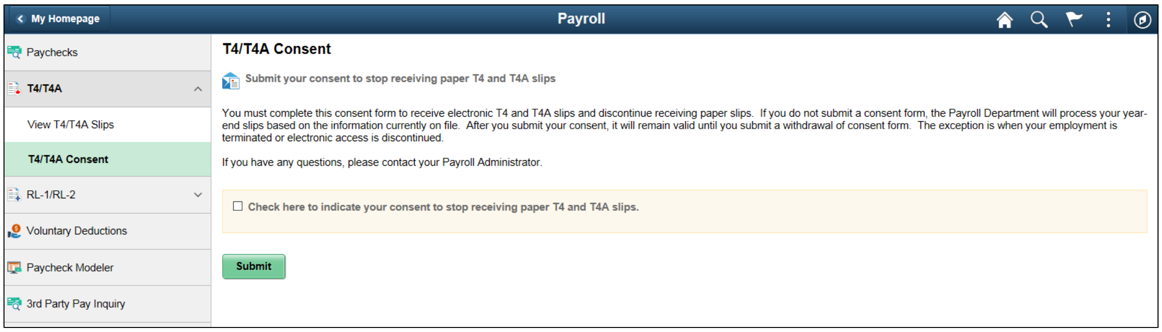


Image: (Smartphone) T4/T4A Consent page

This example illustrates that T4/T4A Consent page for employees who are currently receiving paper forms.

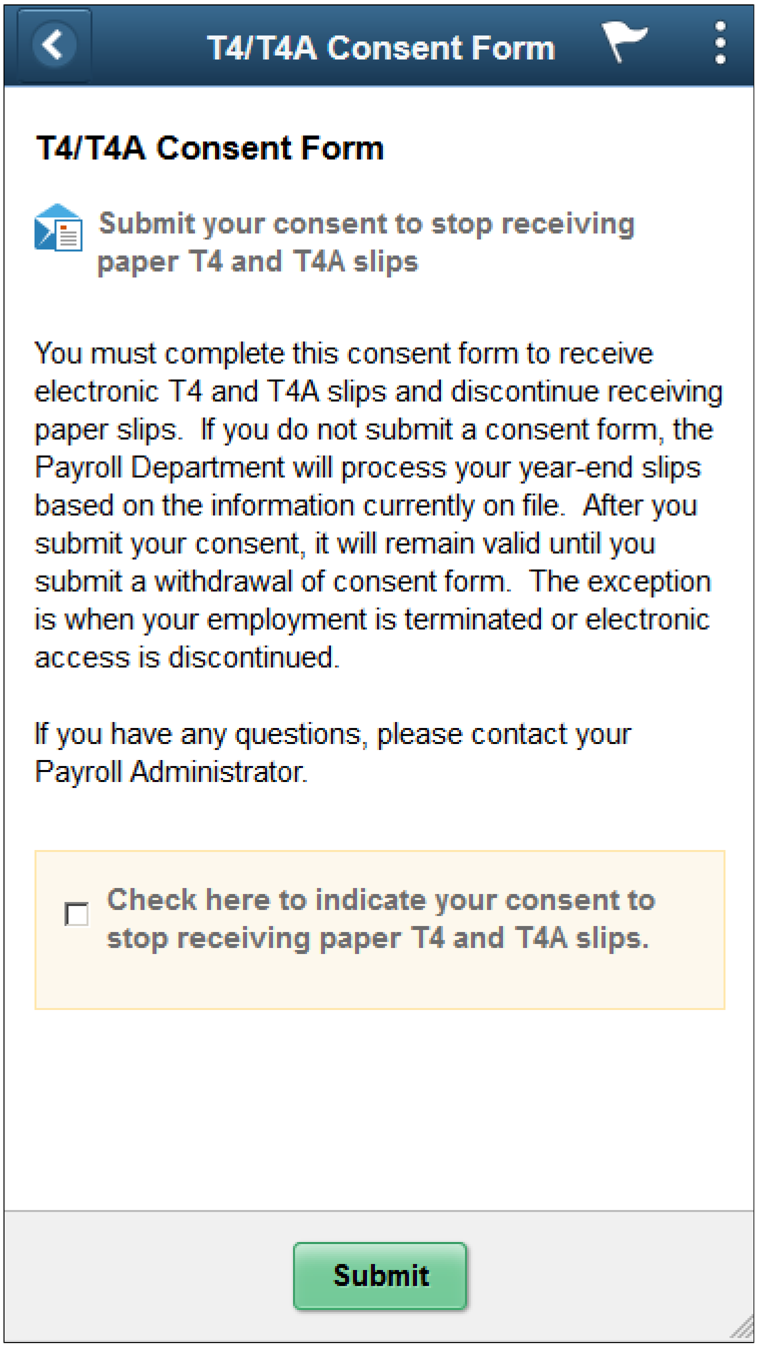


Image: (Desktop) T4/T4A Consent Withdrawal Form page

This example illustrates the T4/T4A Consent Withdrawal Form page for employees currently receiving electronic forms.

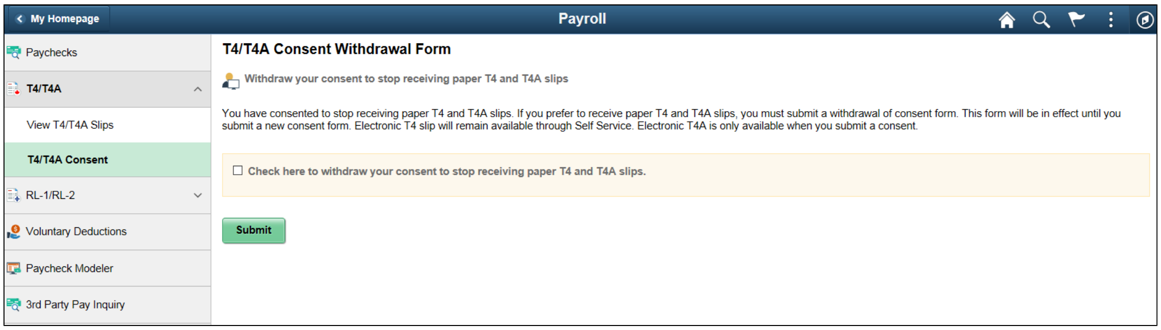
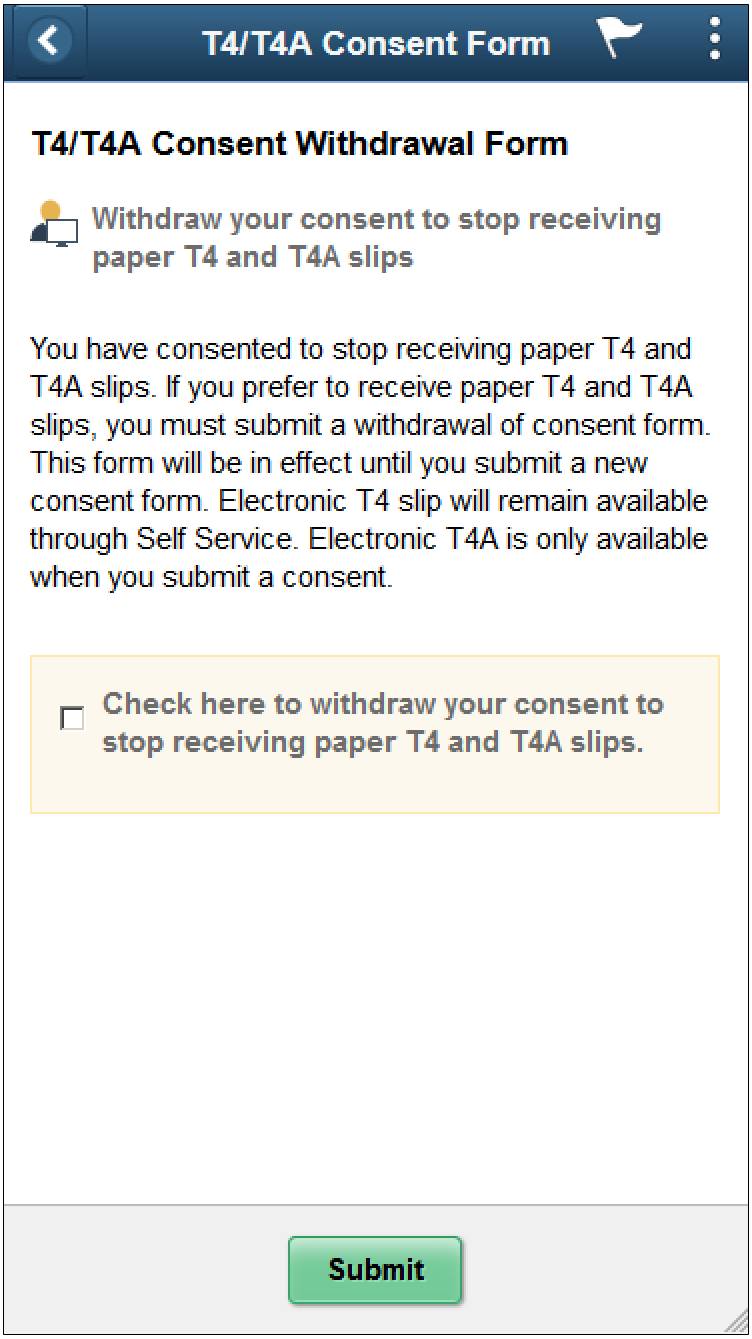


Image: (Smartphone) T4/T4A Consent Withdrawal Form page

This example illustrates the T4/T4A Consent Withdrawal Form page for employees currently receiving electronic forms.



Changing Consent

These page elements appear when an employee accesses the page.

Check here to indicate your consent to stop receiving paper T4 and T4A slips.	This check box appears if the employee currently receives paper forms by mail. The employee selects this box to give consent to receive the forms electronically and stop receiving paper slips.

Check here to withdraw your consent to stop receiving paper T4 and T4A slips.	This check box appears if the employee currently receives their year-end slips electronically. The employee selects this box to withdraw consent and receive paper T4 and T4A slips.
Submit	Select this button to submit the changes. On selecting the button, the Verify Identity Page.

Confirmation Information

The T4/T4A page displays confirmation information once the employees verify their identity and complete the process of submitting or withdrawing consent.

Image: (Desktop) T4/T4A Consent page after a change is submitted

This example illustrates the T4/T4A Consent page after an employee has submitted consent to receive year-end forms electronically.

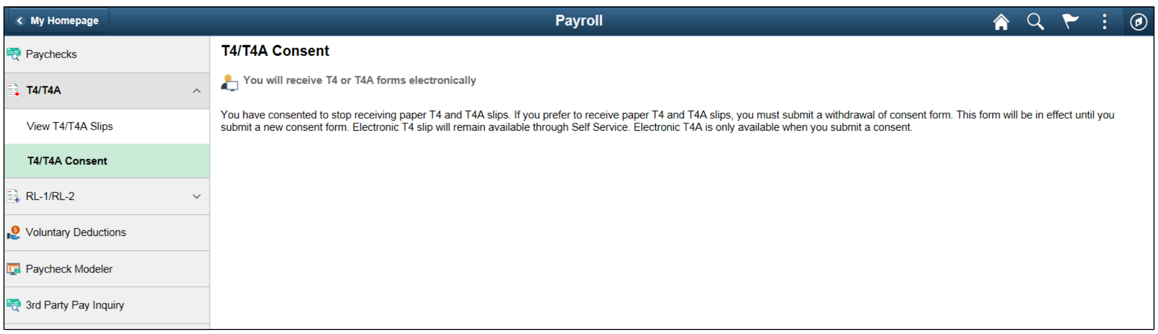
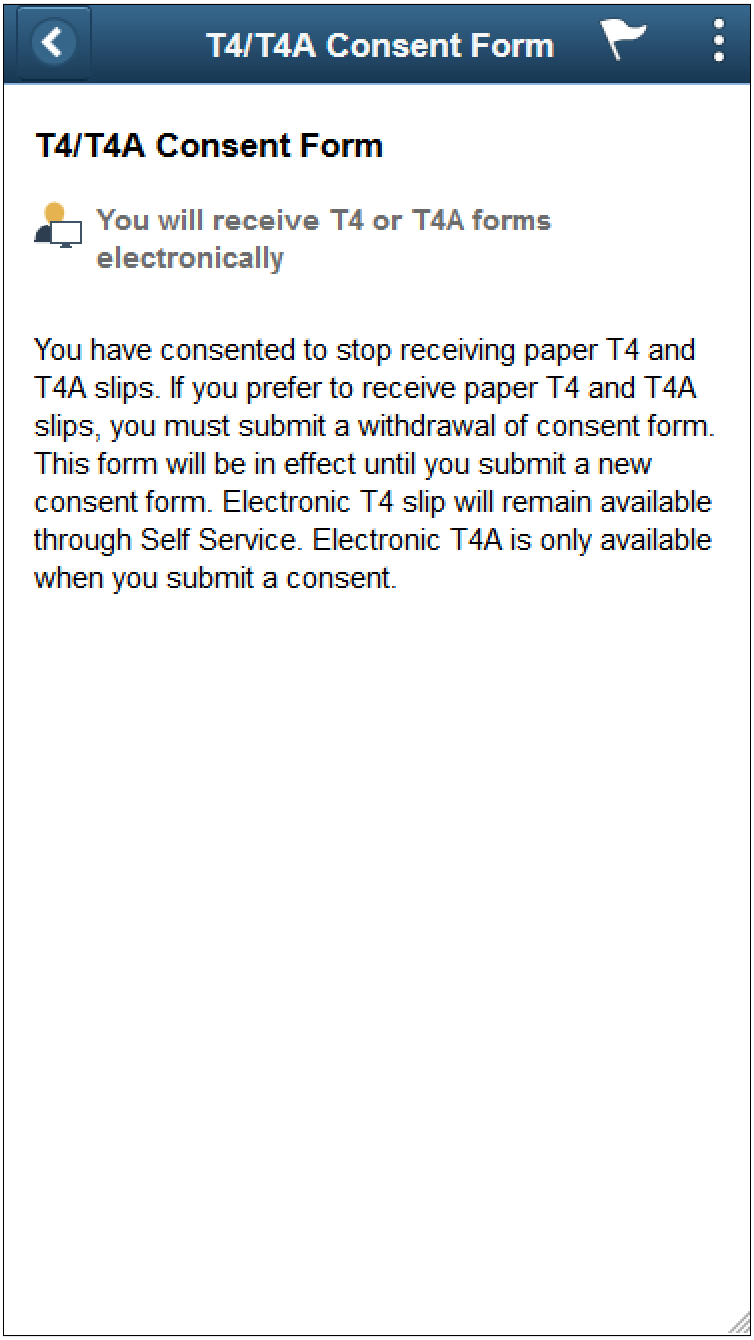


Image: (Smartphone) T4/T4A Consent page after a change is submitted

This example illustrates the T4/T4A Consent page after an employee has submitted consent to receive year-end forms electronically.



Verify Identity Page

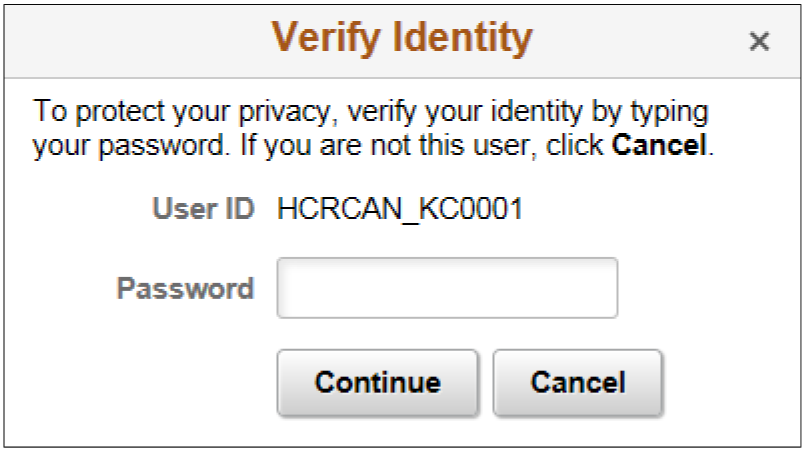
Use the Verify Identity page to enter their password to confirm their consent for electronic year-end forms.

Navigation

Click the Submit button on the selected Consent page.

Image: Verify Identity page

This example illustrates the fields and controls on the Verify Identity page.



Employees verify their identity by entering their PeopleSoft password and then clicking the Continue button.

After the employee's identity is verified, the employee's new consent status is saved.

View T4/T4A Slips Page

Use the View T4/T4A Slips page (PY_SS_YET4_FORM_FL) to view the T4/T4A slips in Employee Self Service.

Note: Employees can submit or withdraw consent to stop receiving paper T4 and T4A slips using T4/T4A Consent Page.

Navigation

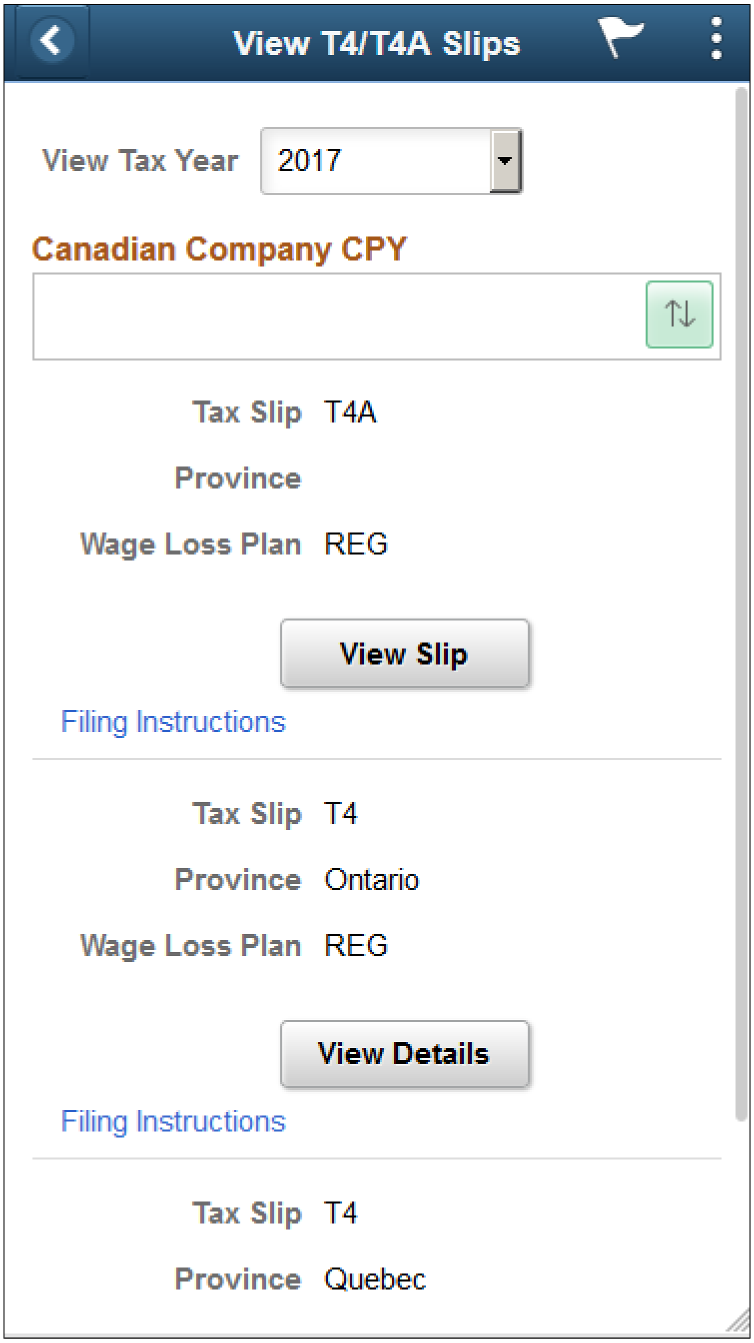
From the Employee Self-Service home page, click the Payroll tile to access the Payroll page. Then click the T4/T4A option and select T4/T4A Slips from the left navigation pane.

Image: View T4/T4A Slips page

This example illustrates the View T4/T4A Slips Page when the employee has given the consent.

Image: (Smartphone) View T4/T4A Slips page

This example illustrates the fields and controls on the View T4/T4A Slips page.



View Tax Year	Canadian employees who have consented to receive electronic slips can view and print year-end slips and filing instructions, listed by tax year. **Note:** If the employee has not given consent, they can only view and print year-end slips from 2017 onwards. If the consent is given, employees can view and print year-end slips from previous years.

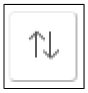
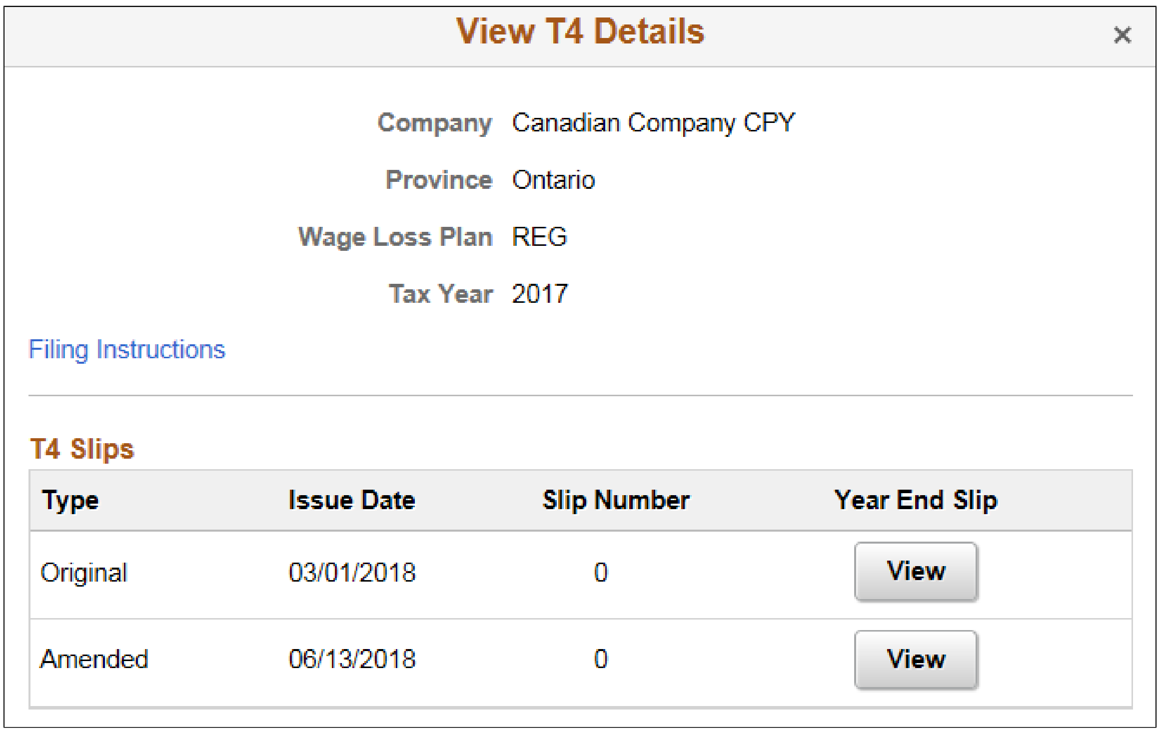
	Employees can sort the list based on Tax Slip, Province and Wage Loss Plan. If the employee is associated with multiple companies, sorting can also be done based on Company.
View Slip	Click the View Slip button to view and print the year-end slip.
View Details	View Details button appears for employees with multiple slips. Select the button to open View T4 Details page.

Image: View T4 Details page

This example illustrates the fields and controls on the View T4 Details page.



Employees can view Original, Amended, Canceled and Re-Issued T4/T4 A slips using View T4 Details page.

The employees who are associated with multiple companies can also view their T4/T4A slips using View T4/T4A Slips page.

Image: View T4/T4A Slips (Employee with Multiple Companies)

This example illustrates the fields and controls on the View T4/T4A Slips when an employee is associated with multiple companies.

RL-1/RL-2 Consent page

Use the RL-1/RL-2 Consent page (PY_RL_CONSENT_FL) to request or withdraw consent to stop receiving paper RL-1 and RL-2 slips.

Navigation

From the Employee Self-Service home page, click the Payroll tile to access the Payroll page. Then select RL-1/RL-2 Consent from the left navigation pane.

Image: (Desktop) RL-1/RL-2 Consent page

This example illustrates that RL-1/RL-2 Consent page for employees who currently stopped receiving paper year-end slips.

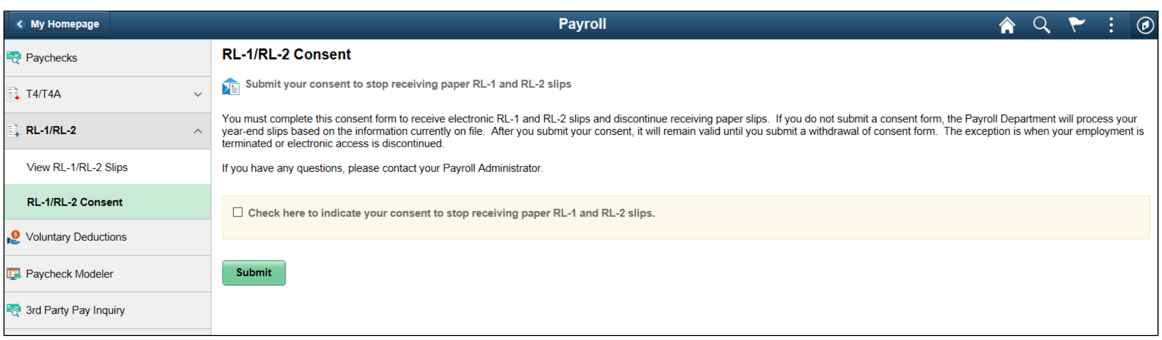


Image: (Smartphone) RL-1/RL-2 Consent page

This example illustrates that RL-1/RL-2 Consent page for employees who currently stopped receiving paper year-end slips.

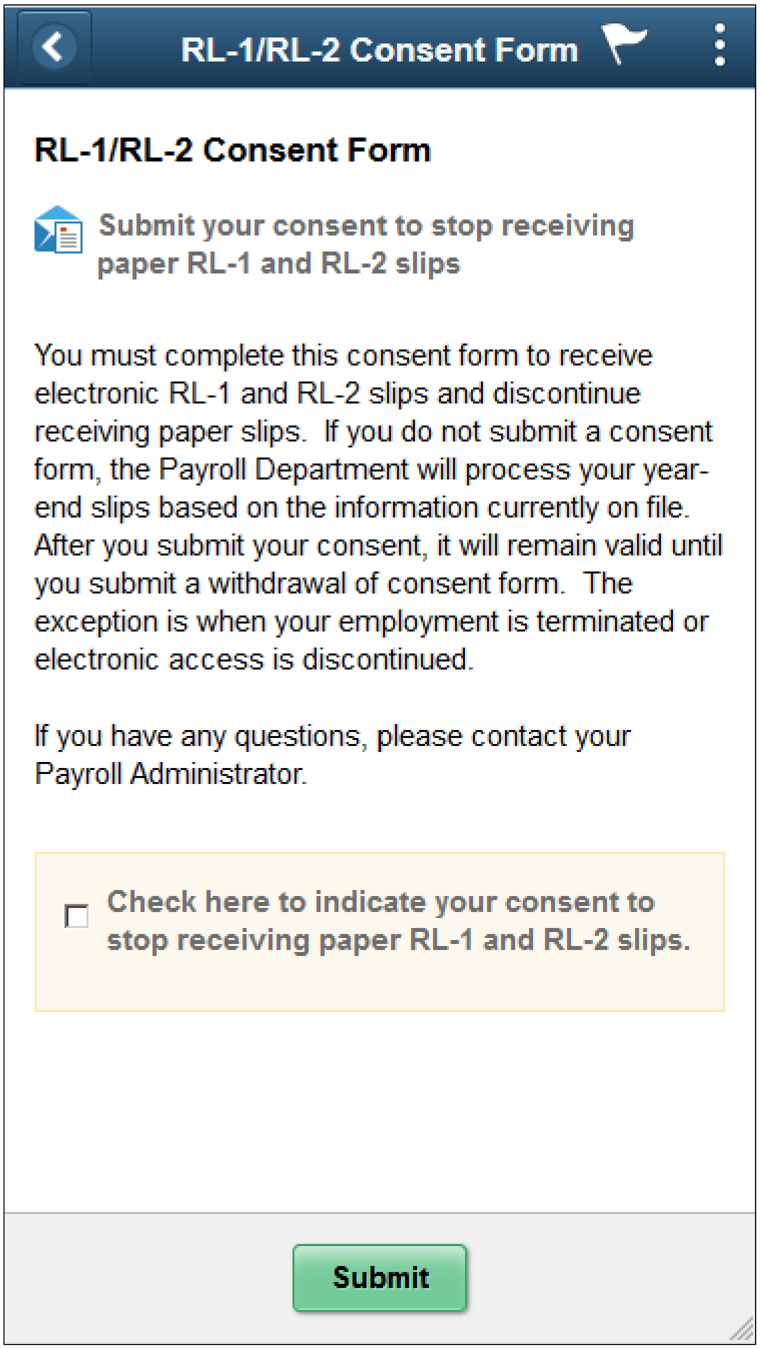


Image: (Desktop) RL-1/RL-2 Consent Withdrawal Form page

This example illustrates the RL-1/RL-2 Consent Withdrawal Form page for employees who stopped receiving paper year-end slips.

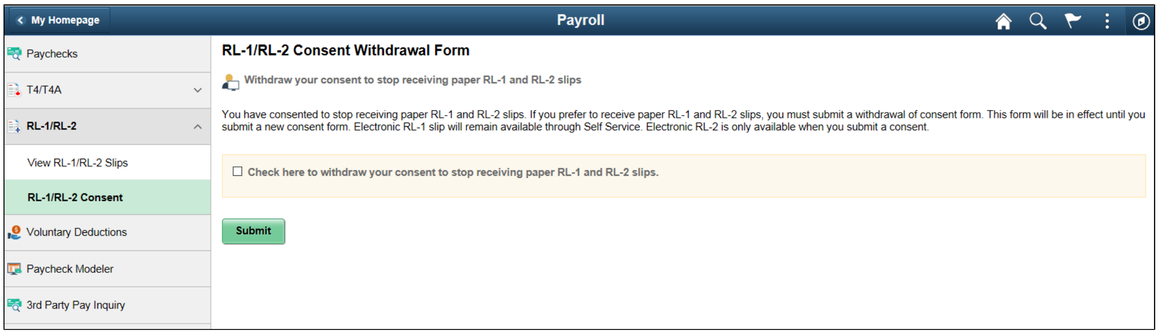
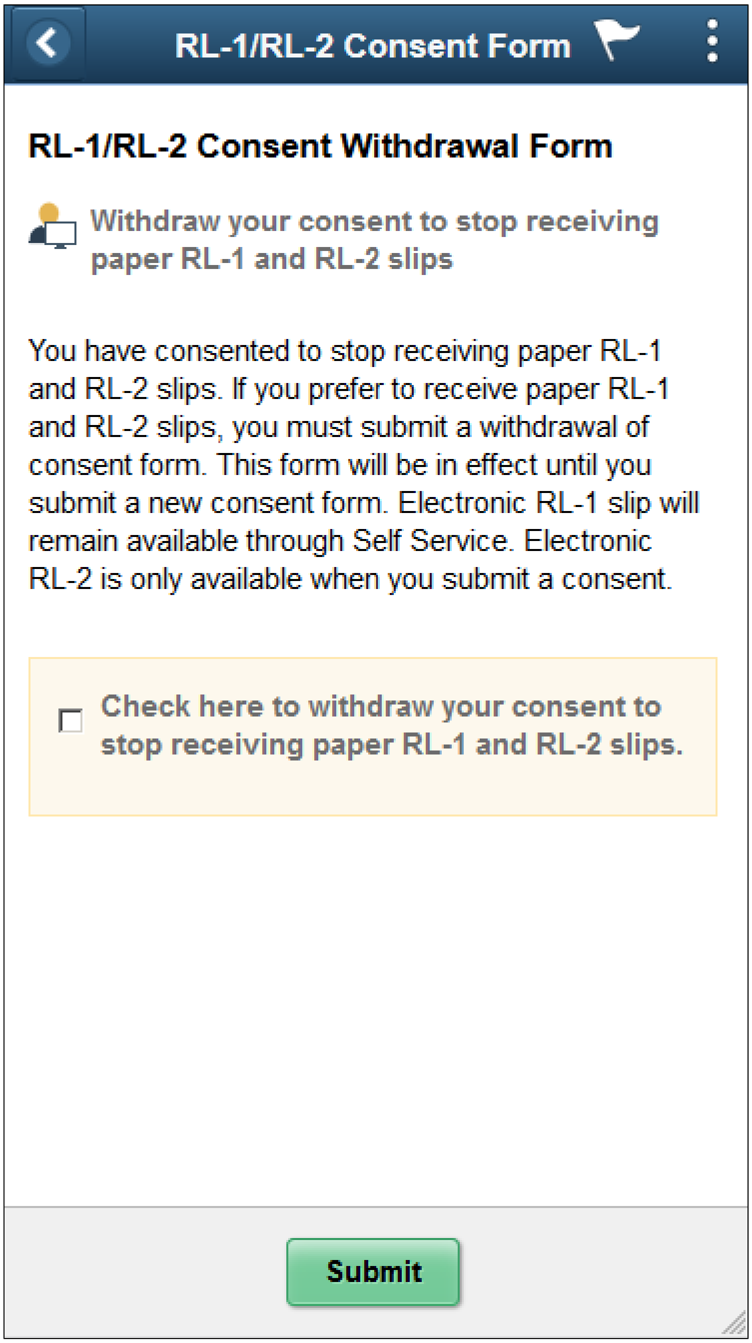


Image: (Smartphone) RL-1/RL-2 Consent Withdrawal Form page

This example illustrates the RL-1/RL-2 Consent Withdrawal Form page for employees who stopped receiving paper year-end slips.



Changing Consent

These page elements appear when an employee accesses the page.

Check here to indicate your consent to stop receiving paper RL-1 and RL-2 slips.	This check box appears if the employee currently receives paper forms by mail. The employee selects this box to submit consent to receive the forms electronically.

Check here to withdraw your consent to stop receiving paper RL-1 and RL-2 slips.
This check box appears if the employee currently receives the year-end slips electronically. The employee selects this box to withdraw consent and start receiving paper RL-1 and RL-2 slips.

Submit
Select this button to submit the changes. On selecting the button, the Verify Identity Page.

Confirmation Information

The RL-1/RL-2 page displays confirmation information once the employees verify their identity and complete the process of giving or withdrawing consent.

Image: (Desktop) Consent page after a change is submitted

This example illustrates the RL-1/RL-2 Consent page after an employee has submitted consent to stop receiving paper slips.

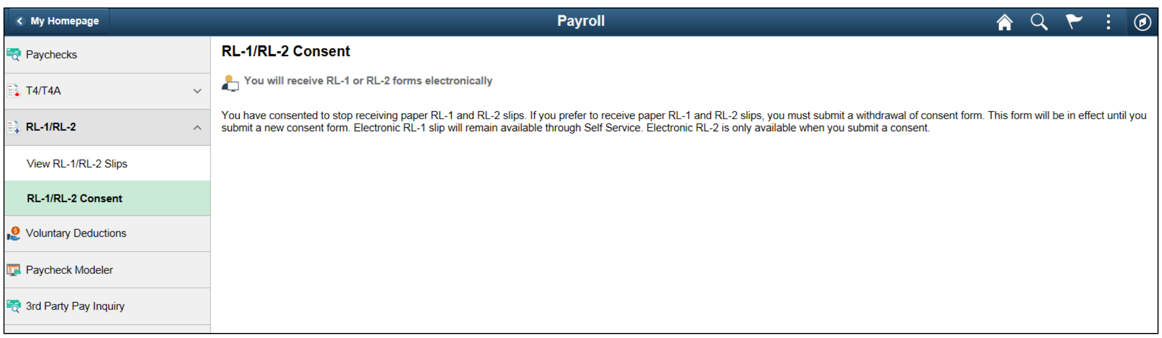
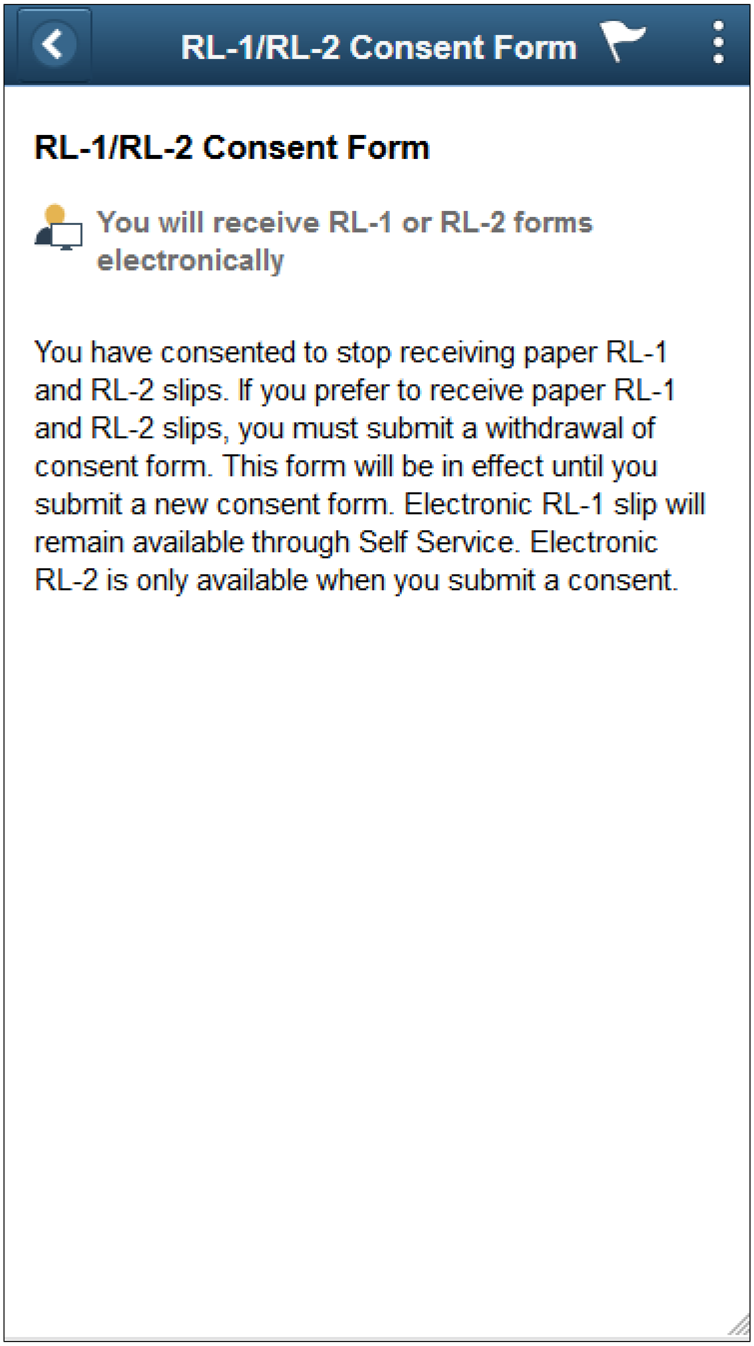


Image: (Smartphone) Consent page after a change is submitted

This example illustrates the RL-1/RL-2 Consent page after an employee has submitted consent to stop receiving paper slips.



View RL-1/RL–2 Slips Page

Use the View RL-1/RL–2 Slips page (PY_SS_YE_RL_VW_FL) to view the RL-1/RL–2 slips in Employee Self Service.

Note: Employees can request or withdraw consent to stop receiving paper RL-1 and RL–2 slips using RL-1/RL-2 Consent page.

Navigation

From the Employee Self-Service home page, click the Payroll tile to access the Payroll page. Then click the RL-1/RL–2 option and selectRL-1/RL–2 Slips from the left navigation pane.

Image: (Desktop) View RL-1/RL–2 Slips Page

This example illustrates the View RL-1/RL–2 Slips Page when the employee has submitted consent to stop receiving paper year-end slips.

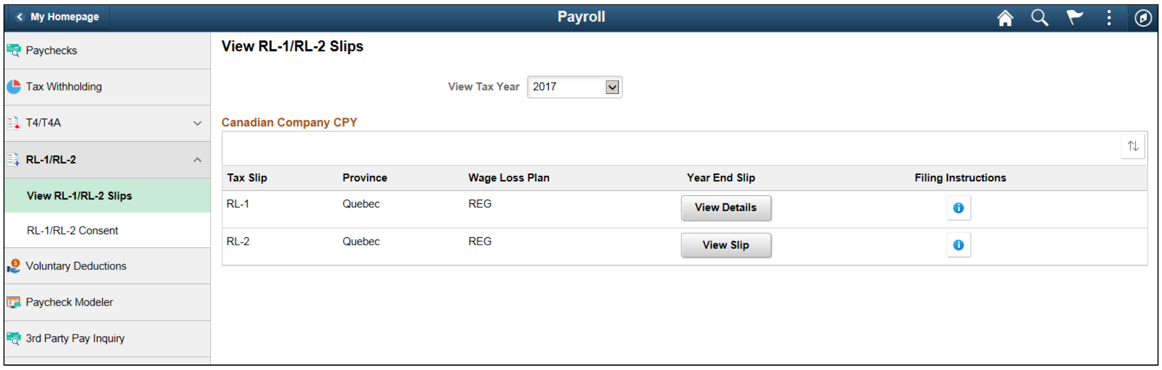
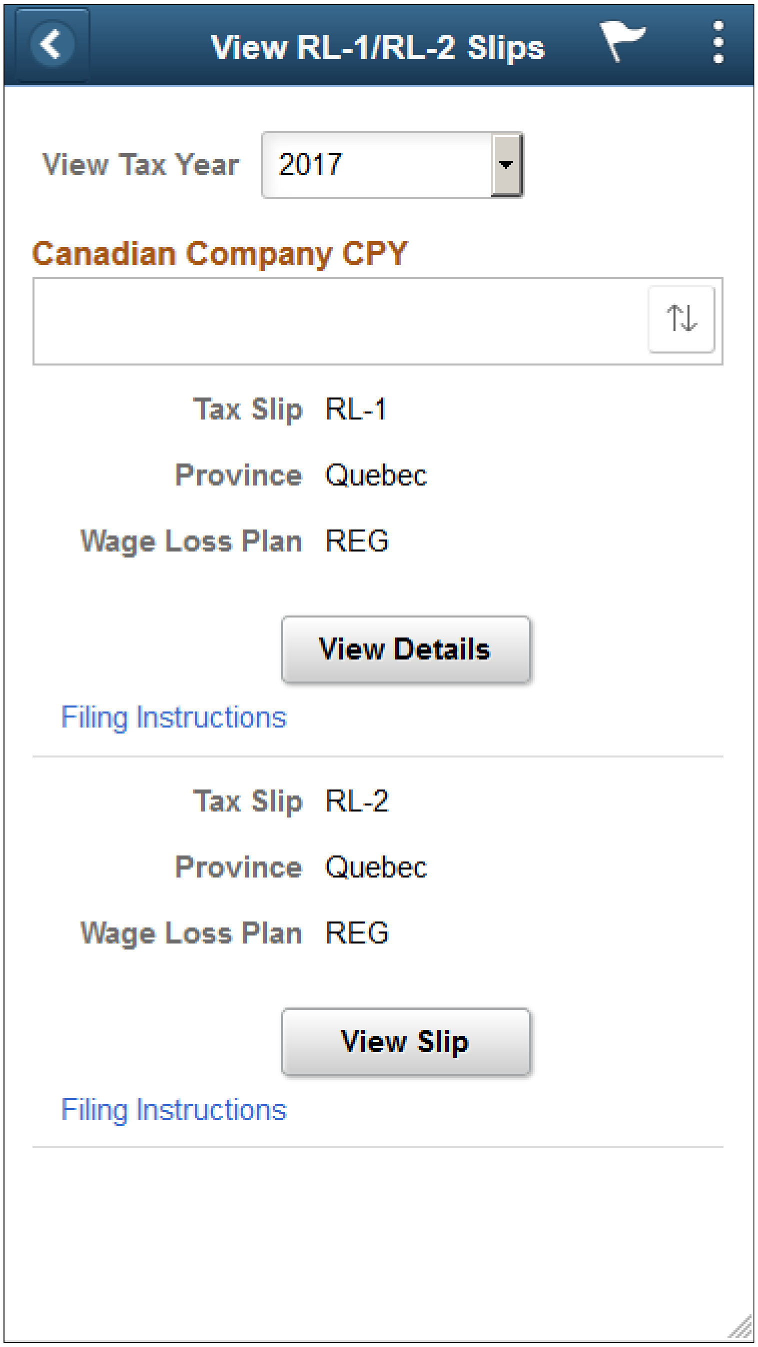
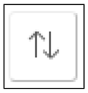


Image: (Smartphone) View RL-1/RL–2 Slips Page

This example illustrates the fields and controls on the View RL-1/RL–2 Slips page.



View Tax Year	Canadian employees who have consented to receive electronic slips can view and print year-end slips and filing instructions, listed by tax year. **Note:** If the employee has not given consent, they can only view and print year-end slips from 2017 onwards. If the consent is given, employees can view and print year-end slips from previous years.



Employees can sort the list based on Tax Slip, Province and Wage Loss Plan. If the employee is associated with multiple companies, sorting can also be done based on Company.

View Slip

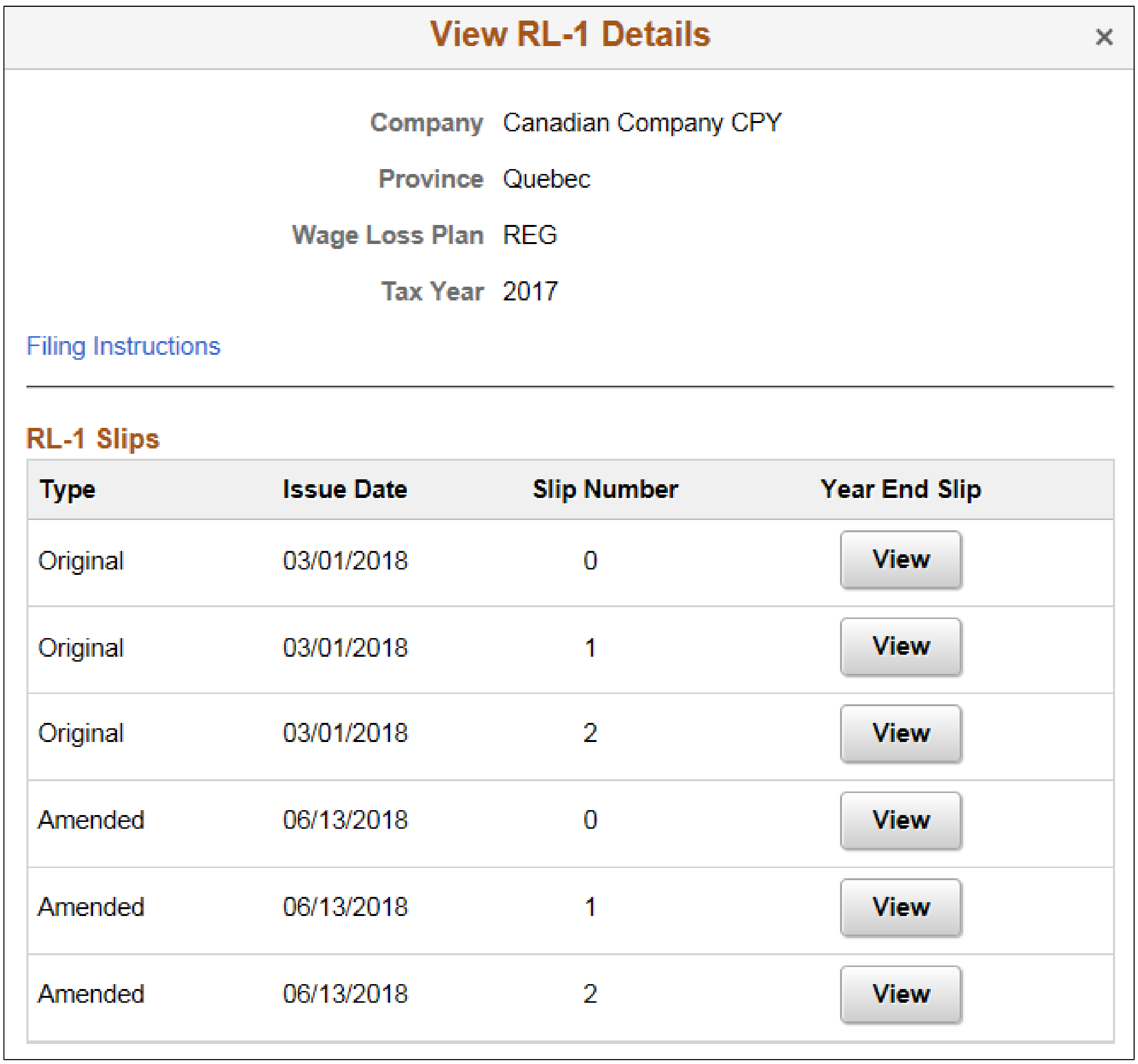
Click the View Slip button to view and print the year-end slip.

View Details

View Details button appears for employees with multiple slips. Select the button to open View RL-1 Details page.

Image: View RL-1 Details page

This example illustrates the fields and controls on the View RL-1 Details page.



Setting Up and Viewing Direct Deposit

Pages Used to Set Up and View Direct Deposit

Employees use these self-service pages to set up and view direct deposit of funds from their paychecks.

Page Name	Definition Name	Usage
Direct Deposit Page	PY_IC_DD_LIST	View current direct deposit information.
Add Direct Deposit Page Change Direct Deposit Page	PY_IC_DD_DATA	Add or change direct deposit information.
Delete Confirmation Page	EO_DEL_CONFIRM	Delete direct deposit information.
Pay Statement Print Option Page	PY_IC_DD_SUPP	Indicate whether employees want a printed copy of the pay statement mailed to their home. The default is yes.

Understanding the Direct Deposit Transaction

To set up direct deposit, employees enter:

- Bank and account information.
- Deposit type (amount or percent) and the value.
- Deposit order for multiple deposits.

Employees can also update or cancel direct deposit instructions in the self-service transaction.

Note: (USA) In the U.S., prenotification may affect the timing of updates to direct deposit.

Upon saving data in the transaction, employees receive a message confirming the save and informing them that due to timing, the change might not be reflected on the very next pay.

Note: (USA and USF) Direct deposit add or edit changes are limited to one transaction per day. You can add or edit information for multiple direct deposit accounts in a singe self-service transaction, but once you save the changes and exit the Direct Deposit page (PY_IC_DD_LIST), you cannot make additional changes on the same day. If you attempt to make additional changes, a message appears from the Direct Deposit page saying that multiple direct deposit changes are not allowed on the same day.

About Email Notifications

If direct deposit email notifications are activated on the "Direct Deposit Controls Page" (PeopleSoft HCM 9.2: Payroll for North America), the system sends direct deposit notifications to the employee, the payroll administrator, or both. Notifications are sent any time employee direct deposit information is entered or updated.

Important! Notification emails are sent to the primary email address for the recipient's User Profile, not to the email address in the recipient's HR personal data record.

Employees cannot update their own User Profile email address. Administrators are responsible for maintaining this information. To view or update the email address for a User Profile, click the Edit Email Addresses link on the General page of the User Profiles component (PeopleTools >Security >User Profiles >User Profiles).

About Bank Validation

If validations are turned on and configured, the system validates the (USA, USF) bank ID (bank routing transit number) or the (CAN) bank ID and branch ID employee direct deposit account information is entered or updated,.

Bank validation functionality is configured on the Direct Deposit Controls page (DIR_DEP_CNTRLS). See "Setting Up Direct Deposits" (PeopleSoft HCM 9.2: Payroll for North America) in your PeopleSoft Payroll for North America product documentation.

About Account Masking

If direct deposit account masking is turned on and configured, the system masks all but the last four digits of a direct deposit account number on employee direct deposit pages, administrator direct deposit pages, and wage statements (PDF and non-PDF paychecks and pay advices), depending on the configuration. Masking is optional, but strongly recommended.

To understand masking functionally, see the Account Number field on the Request Deposit (DIRECT_DEPOSIT) or (DIRECT_DEPOSIT_CAN) page under "Setting Up Direct Deposits" (PeopleSoft HCM 9.2: Payroll for North America), and the Mask Direct Deposit Account Nbrs group box on the Payroll for NA Installation page (INSTALLATION_PY), where masking is configured, under "Defining System Settings for Payroll for North America" (PeopleSoft HCM 9.2: Payroll for North America), both in your PeopleSoft Payroll for North America product documentation.

Related Links

"Setting Up Direct Deposits" (PeopleSoft HCM 9.2: Payroll for North America)

Using the PeopleSoft Fluid User Interface to Add and Modify Direct Deposit Accounts

This topic discusses how employees use the PeopleSoft Fluid User Interface to view, add, and modify Direct Deposits for PeopleSoft Payroll for North America (USA and CANADA).

For general information about Fluid pages in PeopleSoft HCM, see "Understanding PeopleSoft Fluid User Interface Home Pages" (PeopleSoft HCM 9.2: Application Fundamentals) in your PeopleSoft HCM Application Fundamentals product documentation.

Pages Used to Add and Modify Direct Deposit Accounts

Page Name	***Definition Name***	***Usage***
Payroll Tile	HC_PY_SS_NAVCOLL_FL (cref for the tile) PY_IC_WH_PTILE_FLU (page for dynamic data)	Access a collection of self-service payroll transactions, including the option to add, view and modify direct deposit.
Direct Deposit Page	PY_IC_DIR_DEP_FL	View current direct deposit information.
Add Account Page	PY_IC_DD_DATA_SCF	Add a new direct deposit account.

Page Name	Definition Name	Usage
Edit Account Page	PY_IC_DD_DATA_SCF	View, update or remove an existing direct deposit account.
Reorder Accounts Page	PY_IC_DD_ORDER_SCF	Change the priority in which the accounts are processed

Understanding the Direct Deposit Transaction

To add a direct deposit transaction, employees enter:

- Nickname
- Payment Method
- Bank and account information
- Deposit type (amount or percent) and the value

Employees can also edit, update or remove direct deposit accounts.

Note: (USA) Pre-notification may affect the timing of the direct deposit updates in U.S.

Note: (USA, Canada and USF) If all direct deposit entries are removed, the user will not be able to add new account(s) until the following day. The user will be notified of this restriction when deleting the last account in self-service.

Email Notification

If direct deposit email notifications are configured on the "Direct Deposit Controls Page" (PeopleSoft HCM 9.2: Payroll for North America), the system sends direct deposit notifications to the employee, the payroll administrator, or both. Notifications are sent any time employee direct deposit information is entered or updated.

Important! Notification emails are sent to the primary email address for the recipient’s User Profile, not to the email address in the recipient’s HR personal data record.

Employees cannot update their own User Profile email address. Administrators are responsible for maintaining this information. To view or update the email address for a User Profile, click the Edit Email Addresses link on the General page of the User Profiles component (PeopleTools > Security > User Profiles > User Profiles).

Push Notifications/Alerts

If direct deposit alerts are enabled on the "Direct Deposit Controls Page" (PeopleSoft HCM 9.2: Payroll for North America), the system sends push notifications to the employee, the payroll administrator, or both. Notifications are sent any time employee direct deposit information is entered or updated.

Account Masking

If direct deposit account masking is enabled, the system masks all but the last four digits of a direct deposit account number on employee direct deposit pages, administrator direct deposit pages, and wage statements (PDF and non-PDF paychecks and pay advices), depending on the configuration. Masking is optional, but strongly recommended.

For more information on masking functionally, see:

- The Account Number field on the "Request Direct Deposit Page" (PeopleSoft HCM 9.2: Payroll for North America) (DIRECT_DEPOSIT) or (DIRECT_DEPOSIT_CAN).
- The Mask Direct Deposit Account Nbrs group box on the "Payroll for NA Installation Page" (PeopleSoft HCM 9.2: Payroll for North America).

Direct Deposit Page

Use the Direct Deposit page (PY_IC_DIR_DEP_FL) to view your current direct deposit information. You can also add a new direct deposit information using this page.

Navigation

Select the Payroll tile on a PeopleSoft Fluid User Interface home page. The Payroll tile is on the delivered Employee Self-Service home page.

Image: (Smartphone) Direct Deposit page

This example illustrates the Direct Deposit page for the smartphone.

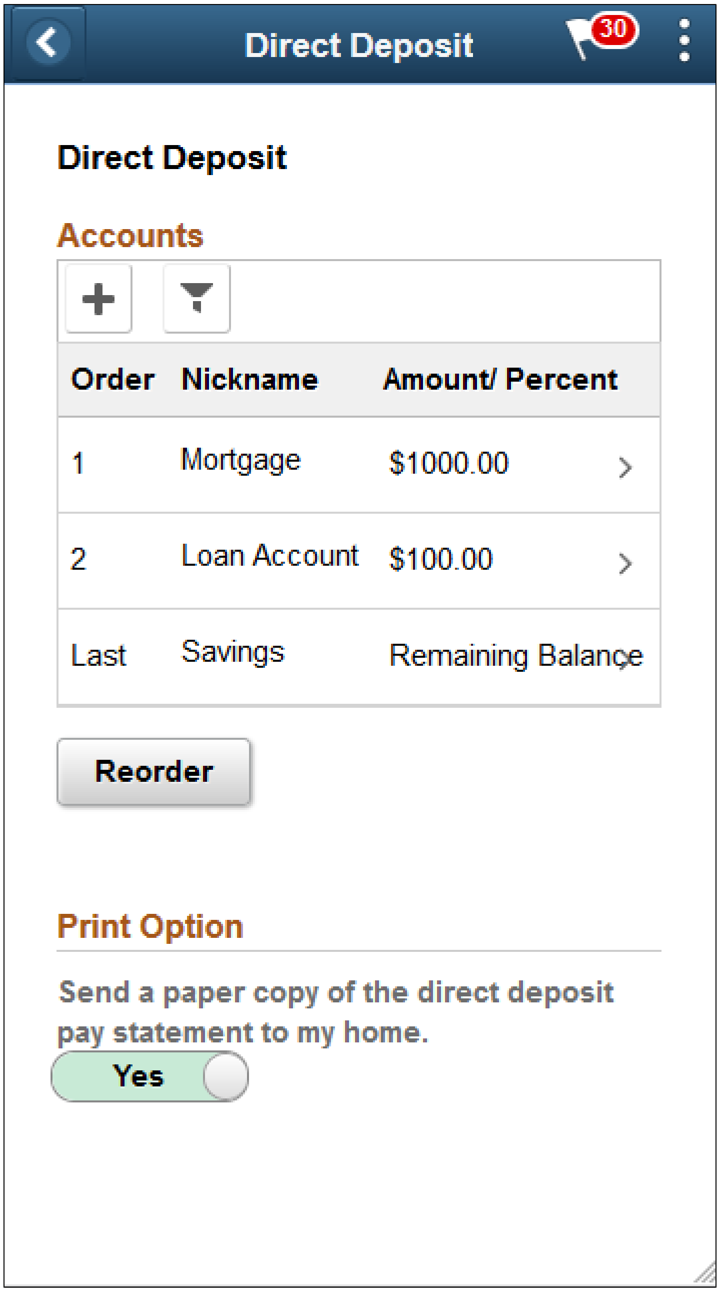


Image: (Desktop) Direct Deposit page for USA

This example illustrates the Direct Deposit page.

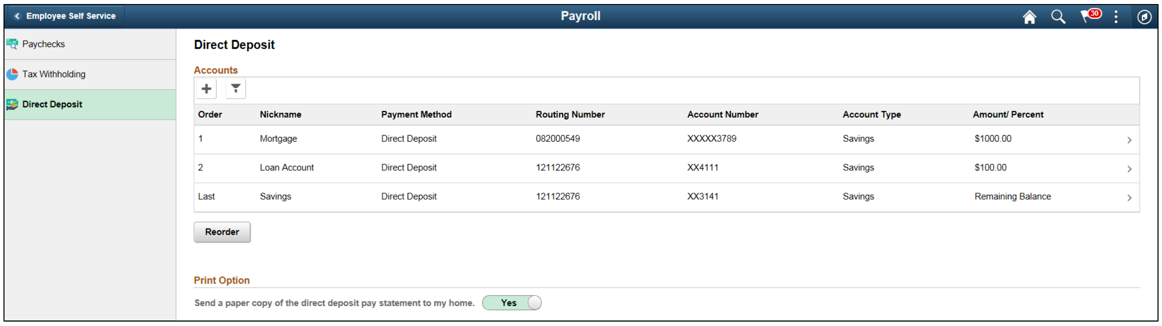
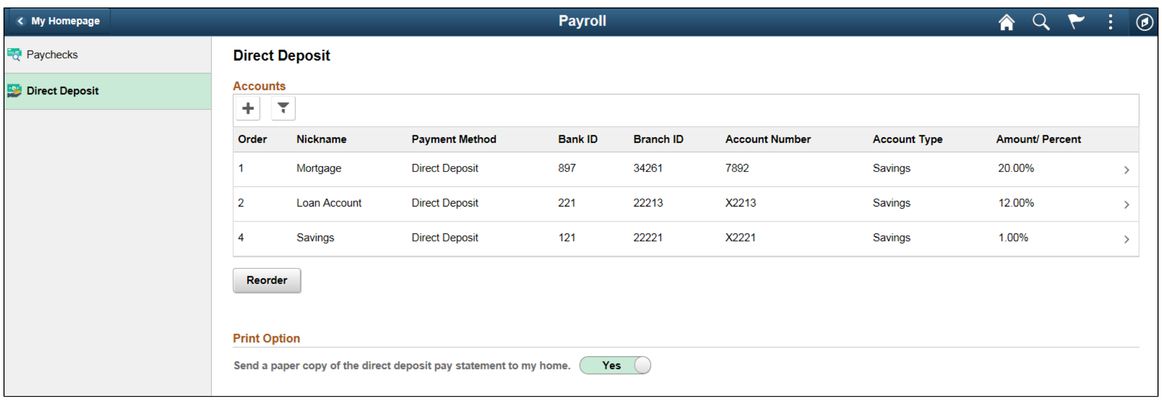
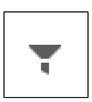


Image: (Desktop) Direct Deposit page for Canada

This example illustrates the Direct Deposit page.



In the Direct Deposit page, you can view the list of your existing direct deposit accounts with details. Click on each account row to view more information.



Tap the filter icon to filter records based on the payment method.

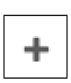
Reorder

Tap the Reorder button to open Reorder Accounts Page.

Note: Reorder button will not be available if Filter is applied.

Print Option

The Print Option will be automatically set to ‘Yes’, and a printed copy of the pay statement will be mailed to your home. Based on the selection, you will receive a confirmation message.



Tap the Add button to add a new direct deposit account.

Add Account Page

Use Add Account page (PY_IC_DD_DATA_SCF) to add a new direct deposit account.

Navigation

Click the Add button on the Direct Deposit page.

Image: (Desktop) Add Account page for USA

This example illustrates the Add Account page.

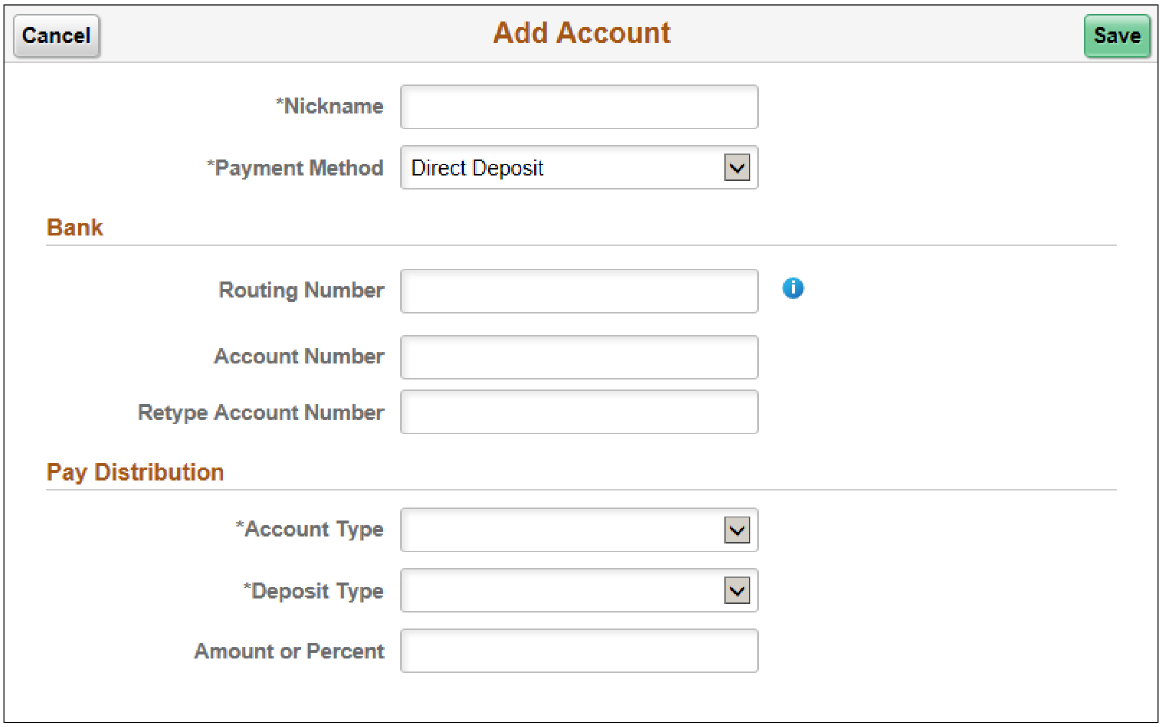
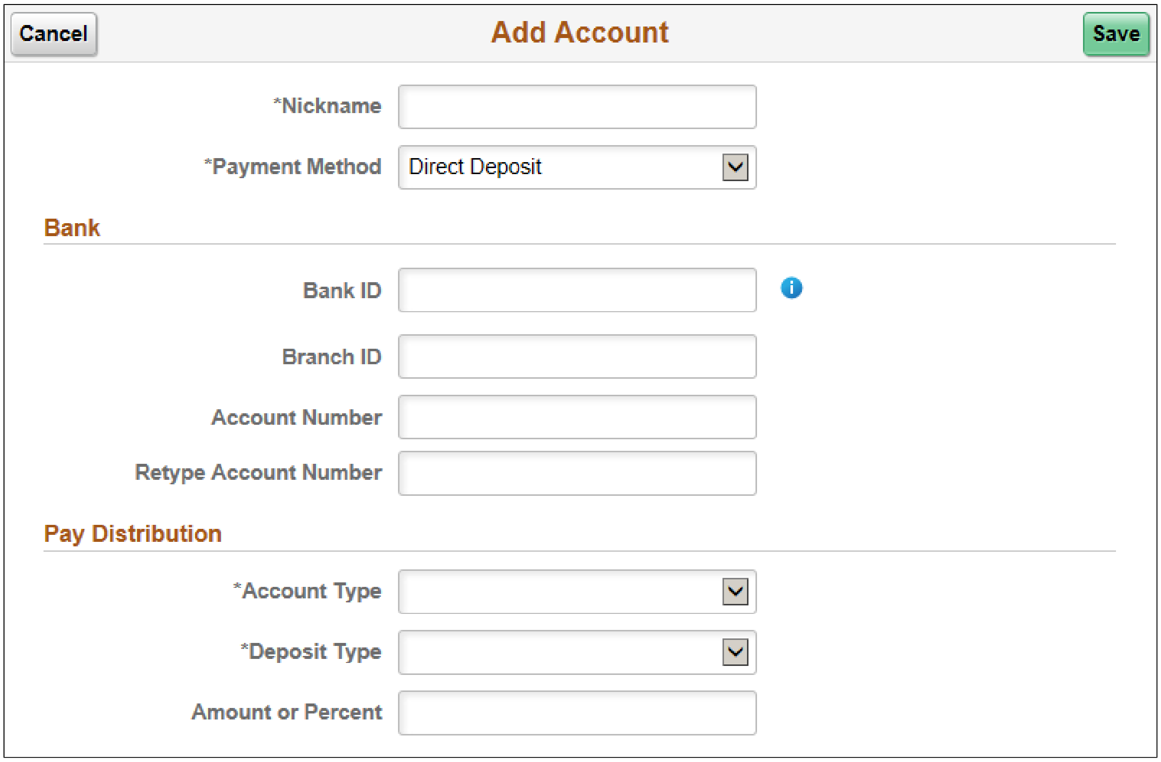


Image: (Desktop) Add Account page for Canada

This example illustrates the Add Account page.



Nickname

Enter the account name. You need to enter a unique account name for each direct deposit entry.

Payment Method

Select the payment method. Valid values are:

- Direct Deposit
- Check

By default, Direct Deposit is selected as the payment method.

If Payment Method is selected as ‘Check’, the page refreshes to display Deposit Type field and Amount or Percent field.

Routing Number

Enter the routing number if you have selected the Payment Method as ‘Direct Deposit’. Routing Number is not applicable if you have selected the Payment Method as Check.

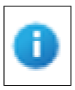
Note: This field is available and applicable for U.S. only. If validations are enabled, the system validates the Bank ID (bank routing transit number) when employee direct deposit account information is entered or updated.
Bank validation functionality is configured on the Direct Deposit Controls page (DIR_DEP_CNTRLS). For more information, see "Setting Up Direct Deposits" (PeopleSoft HCM 9.2: Payroll for North America).

Bank ID and **Branch ID**

(CAN) The Bank ID and Branch ID fields appear in the Distribution group box for Canada only.

Enter the three-digit Bank ID, and enter the five-digit Branch ID.

Note: If validations are enabled, the system validates (CAN) Bank ID and Branch ID when employee direct deposit account information is entered or updated.
Bank validation functionality is configured on the Direct Deposit Controls page (DIR_DEP_CNTRLS). For more information, see "Setting Up Direct Deposits" (PeopleSoft HCM 9.2: Payroll for North America).



Tap the icon to view sample checks with routing number format.

Note: For Canada, the sample cheque with Bank ID format is displayed.

Image: (USA) Sample checks with Routing Number format

This example illustrates the sample check.

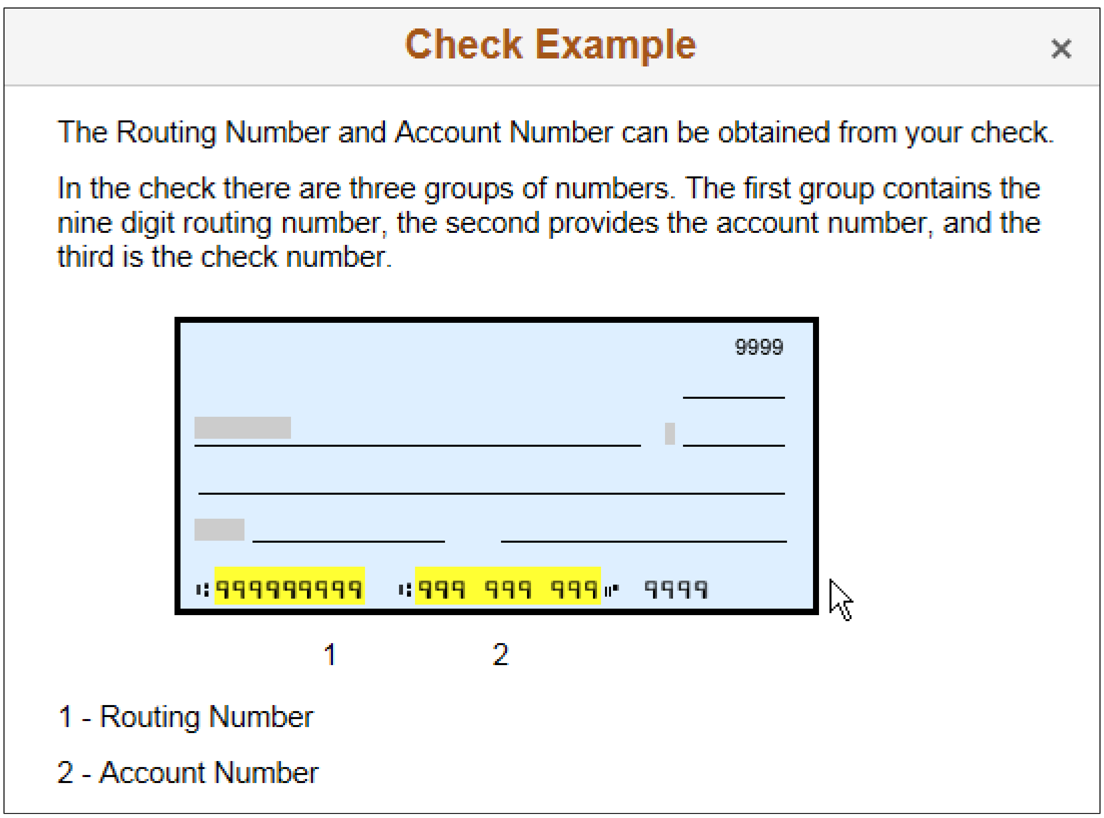
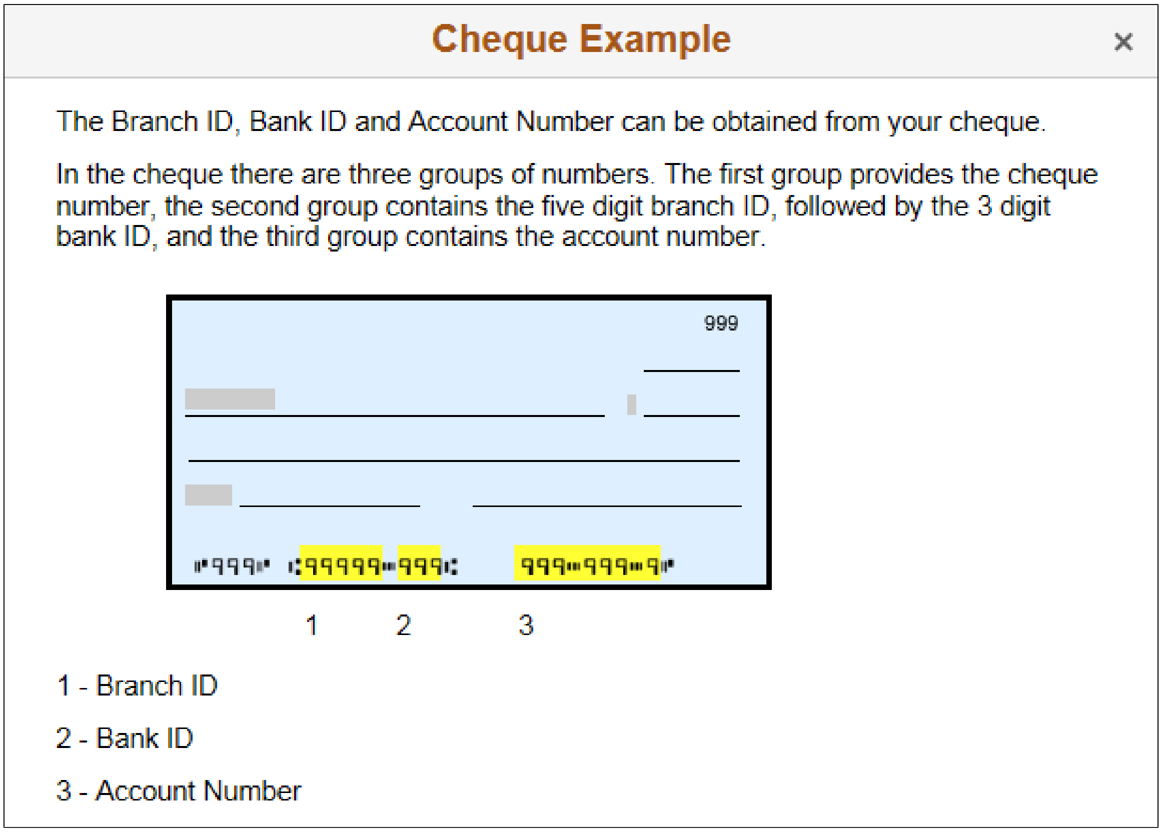


Image: (CAN) Sample cheque with Bank ID format

This example illustrates the sample cheque.



Account Number and **Retype Account Number**
: Enter the employee's account number. The account number represents the employee's checking or savings account into which the money should be deposited.

Account Type
: Select the account type. Valid Values are:

- Checking
- Savings

Deposit Type
: Select the deposit type. Valid Values are:

- Amount: Select this option if the employee wants a fixed dollar amount to be deposited in this account type.
- Percent: Select this option if the employee wants a specific percentage of his net pay to be deposited in this account type.
- Remaining Balance: Select this option if the balance of an employee's pay is to be deposited in this account type.

	Note: If the percent entered is not 100%, and the user has set up a Deposit Type of Remaining Balance, the remaining funds will be automatically paid to the Remaining Balance account. The Remaining Balance account will be the last account processed to pay out all remaining funds.
Amount	Enter the amount to be deposited in this account type. **Note:** This field is available only if you select Amount as the Deposit Type.
Percent	Enter the percentage of the employee's net pay to be deposited in this account type. **Note:** This field is available only if you select Percent as the Deposit Type.

On clicking Save, a new direct deposit account is created and you will be routed to the Direct Deposit Page.

Edit Account Page

Use the Edit Account page (PY_IC_DD_DATA_SCF) to view, modify or remove an existing direct deposit account.

Navigation

Click the > button corresponding to a specific direct deposit account on the Direct Deposit Page.

Image: (Desktop) Edit Account page for USA

This example illustrates the Edit Account page.

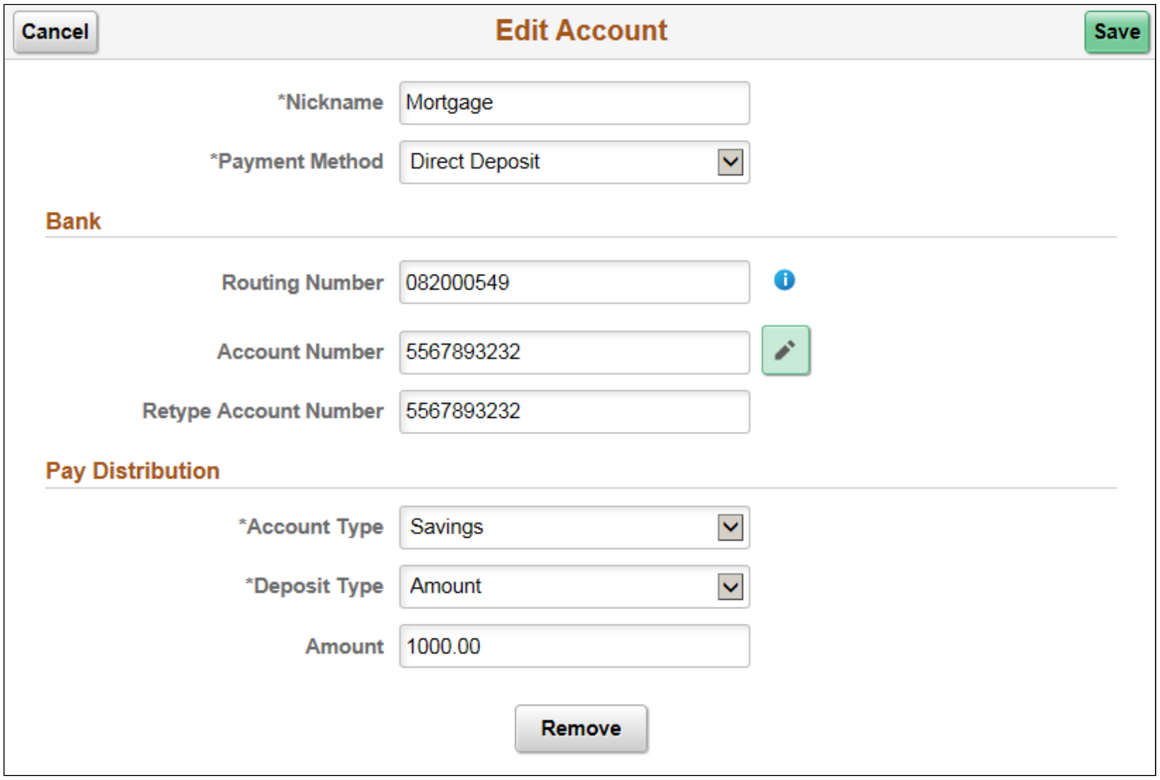
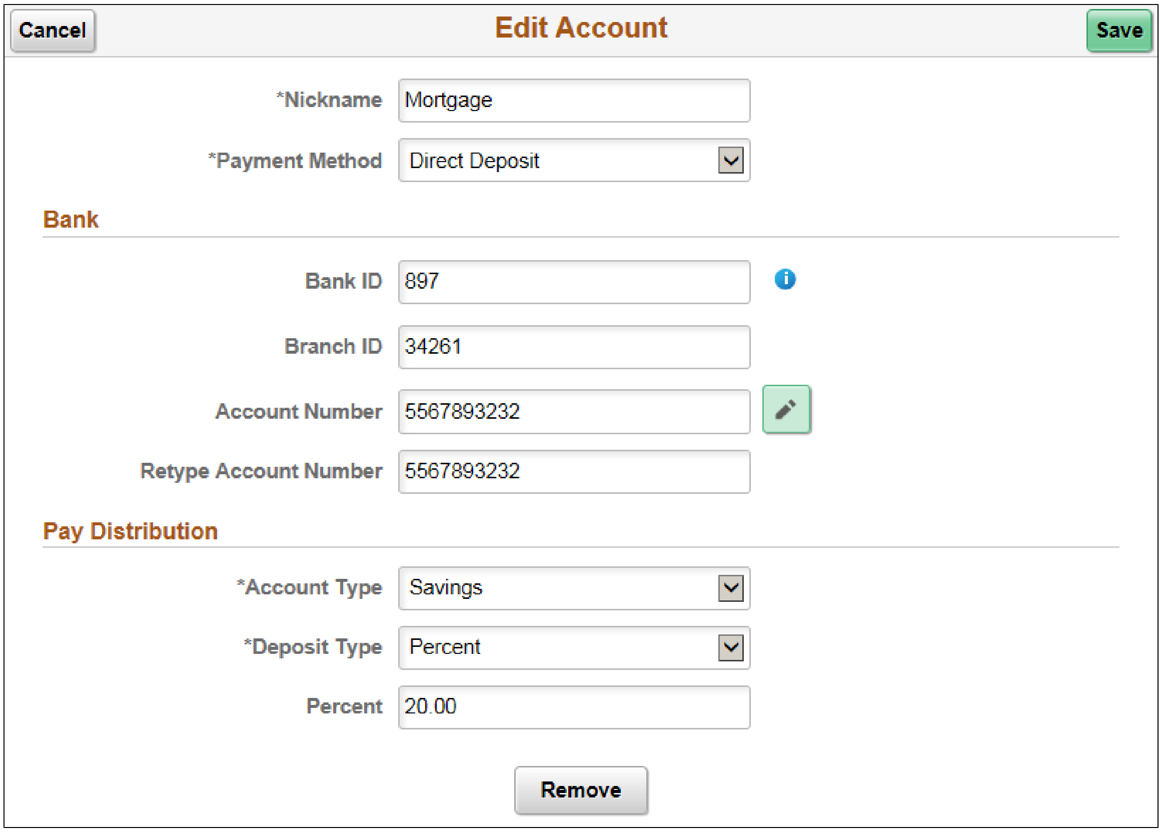


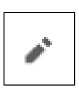
Image: (Desktop) Edit Account page for Canada

This example illustrates the Edit Account page.



You can modify the direct deposit details here.

Note: If the administrator has created the account, Nickname will be auto populated as account type appended with priority number. You can modify it.



Click the icon to update an existing direct deposit account number. Once you are done, click Save.

Note: If direct deposit account masking is enabled, the system masks all but the last four digits of a direct deposit account number.

Remove

Use the Remove button to remove an existing direct deposit account.

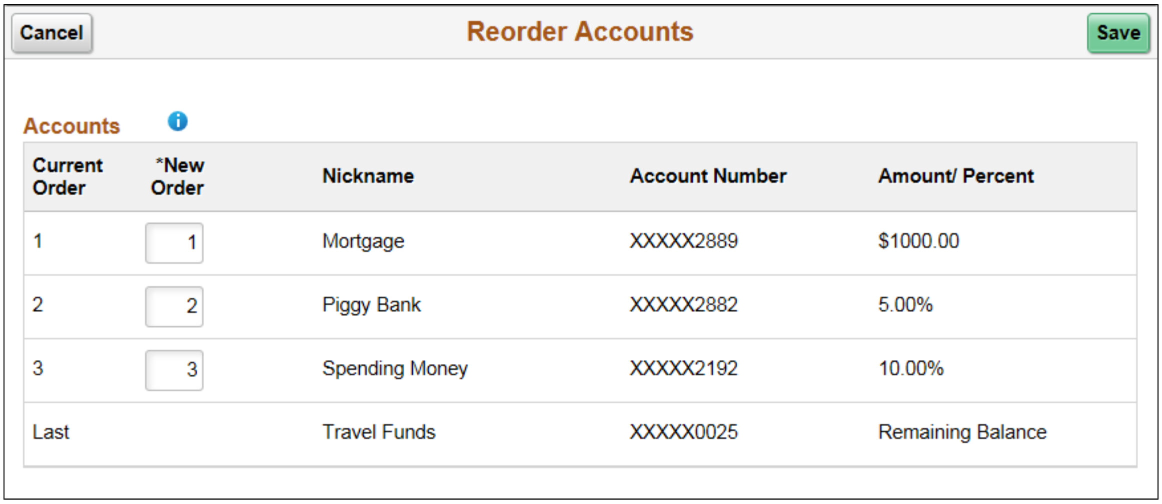
Note: If you remove the last account, the user will not be allowed to add new account(s) on the same day. The user will be instructed to add the new account(s) on the following day.

Reorder Accounts Page

Use the Reorder Accounts page (PY_IC_DD_ORDER_SCF) to change the priority in which the accounts are processed.

Image: Reorder Accounts page

This example illustrates the Reorder Accounts page.



Enter the priority order number in the New Order field and click Save.

System validates the order number and displays an error message, if you have entered:

- Duplicate order number
- An order number greater than the maximum existing order number

Viewing and Updating Voluntary Deductions

Pages Used to Set Up and View Voluntary Deductions

Page Name	***Definition Name***	***Usage***
Voluntary Deductions Page	PY_IC_DED_LIST	View a list of current voluntary deductions.
Add Voluntary Deduction Page Change Voluntary Deduction Page	PY_IC_DED_DATA	Add, change, or stop voluntary deductions.
(USF) Distribution Information Page	W3_GVT_PY_ALOT_IC	Enter details of the account from which the voluntary deduction is taken.

Understanding Voluntary Deductions

To control which general deductions employees can update using self service, use the Allow update via Emp Self Serv (allow update via employee self-service) option on the General Deduction Table page in the Payroll for North America application.

If you enable self-service updates for a deduction, employees can update their own voluntary deductions online. The employee's voluntary deduction changes in the ePay transaction directly update the Payroll for North America database tables.

Prerequisite

To use this transaction, select the Allow update via Emp Self Serv option on the General Deduction Table page for each voluntary deduction that employees can update online.

See "Defining General Deductions" (PeopleSoft HCM 9.2: Payroll for North America).

Setting Up Paycheck Modeling

Pages Used to Set Up Paycheck Modeling

Page Name	***Definition Name***	***Usage***
Company Controls Page	PY_MOD_ADM_COMPANY	Specify system performance options for paycheck modeling.
Pay Group Parameters - Access Controls Page	PY_MOD_ADM_PAYGRP	Set up and control employee access to the Paycheck Modeler by company and pay group. Access can be disabled either permanently or for temporary periods of time.
Pay Group Parameters - Earnings Definition Page	PY_MOD_ADM_ERNINGS	For each eligible company and pay group, define the earnings that will be presented for selection by employees using the Paycheck Modeler when adding earnings to the model paycheck.
Pay Group Parameters - Deduction Definition Page	PY_MOD_ADM_DEDCTNS	For each eligible company and pay group, define the deductions that will be presented for selection by employees using the Paycheck Modeler when adding deductions to the model paycheck.

Understanding Paycheck Modeler

Paycheck modeling is an integration of a modeler with live payroll and human resources and benefits records. The modeling feature leverages the Online Single Check functionality described in "Processing Online Single Checks" (PeopleSoft HCM 9.2: Payroll for North America) in your PeopleSoft Payroll for North America product documentation.

Employees can use Paycheck Modeler to simulate their own paychecks through a self-service web application, investigate their own *what-if* scenarios, and answer most of their own questions without having to call your payroll department.

Warning! Self-service Paycheck Modeler supports US employees with US-based jobs only. The functionality is currently not available to USF or CAN employees, or US employees with non-US-based jobs.

Note: Self-service Paycheck Modeler is available to payroll administrators, however administrators are strongly encouraged to use only the Online Single Check functionality to generate or model paychecks. While Paycheck Modeler leverages the Online Single Check functionality, the Online Single Check functionality has settings that are available only to administrators.

Self-service paycheck modeling is useful when employees want to quickly calculate and simulate estimated paychecks for various scenarios including:

- When an employee is working large amounts of irregular overtime and they want to estimate a check with the overtime pay included.
- When an employee wants to enter new health care contribution amounts, for example during Open Enrollment, to determine the effect on taxes and net pay.
- When an employee received a large tax refund and they want to estimate tax withholding and net pay amounts by manipulating tax withholding status, credit, or exemptions to determine how they might increase net pay and reduce the tax refund in the future.

To protect the live payroll production data from impact, paycheck modeling data is stored in temporary work tables. Model paycheck results are automatically cleared when the user exits the paycheck modeling component, and modeling history is not retained for future access. To prevent modeled checks from being offered as real paychecks or proof of pay, and to protect personal and pay information, a model check printout contains no data that identifies either the employee or the company and the watermark says *Estimate.*

To help manage system performance, system administrators can set Paycheck Modeler to automatically prevent all users from accessing it when regular payroll calculation and confirmation processes are running, and to automatically restore access when the processes have completed. System administrators can also use the to lock employees out of Paycheck Modeling components for specified periods of time, control the number of concurrent users that can access the system at the same time, and control the number of times an individual employee can calculate a model check in one day. See Company Controls Page and Pay Group Parameters - Access Controls Page.

For an administrative overview of the employee's self-service paycheck modeling process, see Understanding the Self-Service Paycheck Modeling Process.

Company Controls Page

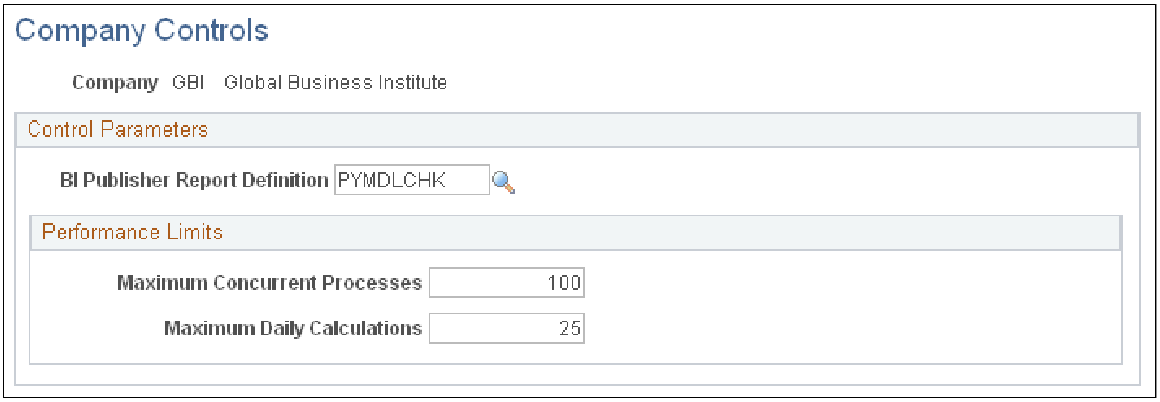
Use the Company Controls page (PY_MOD_ADM_COMPANY) to specify system performance options for paycheck modeling.

Navigation

Setup HCM > Product Related > Payroll for North America > Paycheck Modeling USA > Company Controls

Image: Company Controls page

This example illustrates the fields and controls on the Company Controls page.



Control Parameters

BI Publisher Report Definition

Enter the alpha numeric code for of the report template for the XML-to-PDF publisher to use to format the model check for printing.

Performance Limits

Maximum Concurrent Processes

(Optional) Enter the number to use to restrict how many users can concurrently access the paycheck modeler at the same time. Enter a number that accounts for both payroll administrators and self-service employees. When the maximum number of concurrent users is met, the next employee to try to access the modeler is denied access and receives an error message indicating that the modeler is currently unavailable, and instructing them to try again later.

If the field is blank or contains *0,* the system places no restriction on the number of concurrent paycheck modeling calculations that can be processed at the same time.

Maximum Daily Calculations

(Optional) Enter the number to use to restrict the number of times that the same user can run the paycheck modeling calculation process in a day.

If the maximum daily calculations are exceeded, upon trying to access the modeler again, the employee receives an error message saying they have exceeded the maximum number of times that a model paycheck can be calculated in one day, to please try again tomorrow.

If the field is blank or contains *0,* the system places no restriction on the number of paycheck modeling calculations that the same user can process in one day.

Pay Group Parameters - Access Controls Page

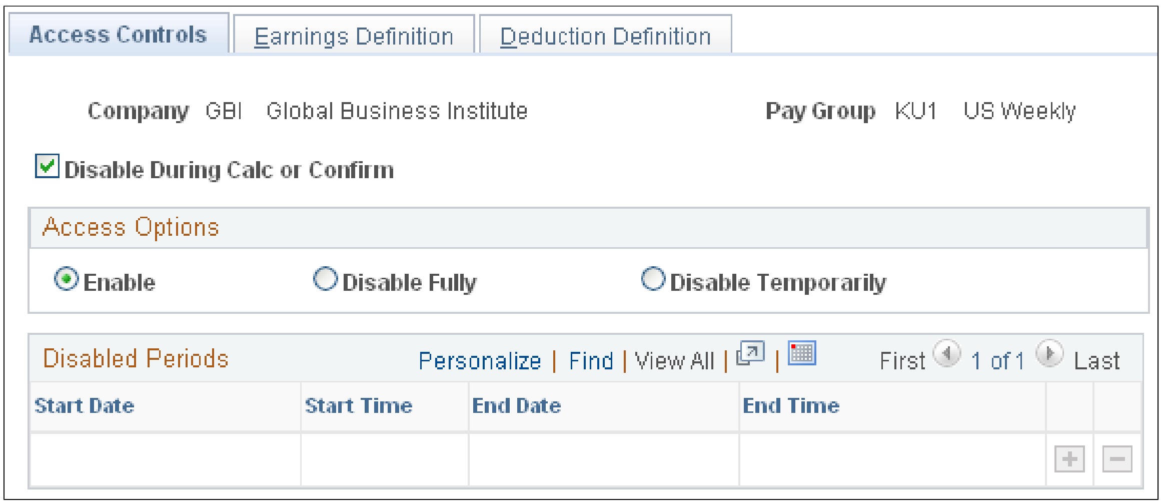
Use the Pay Group Parameters - Access Controls page (PY_MOD_ADM_PAYGRP) to set up and control employee access to Paycheck Modeler by company and pay group.

Navigation

Setup HCM > Product Related > Payroll for North America > Paycheck Modeling USA > Pay Group Parameters > Access Controls Tab

Image: Pay Group Parameters - Access Controls page

This example illustrates the fields and controls on the Pay Group Parameters - Access Controls page.



Use the Pay Group Parameters - Access Controls page to enable or disable access to Paycheck Modeler for each combination of company and pay group that you want to be eligible to use Paycheck Modeler.

Note: The self-service Paycheck Modeler link appears for everyone, however Paycheck Modeler may not be available to everyone. Employees in any pay group for which Paycheck Modeler is not enabled are ineligible to use it. When an employee who is ineligible to use Paycheck Modeler selects the link, a message appears saying that Paycheck Modeler is unavailable for use or that the employee is ineligible to use Paycheck Modeler. The system must be able to retrieve an employee's Job Data pay rate and generate paysheets to model the paycheck. Therefore, employees that belong to an eligible pay group but who have no pay to calculate for the current pay period (for example, with a status of terminated, retired, unpaid leave of absence, and so on) also cannot access Paycheck Modeler. Newly-hired employees who are not active as of the pay period end date of the previously confirmed regular on-cycle paycheck are also unable to use Paycheck Modeler.

Disable During Calc or Confirm	Select this check box to prevent all users (administrators and self-service employees in the defined company and pay group) from accessing Paycheck Modeler when regular on-cycle payroll calculation and confirmation processes are running. A batch run control flag preventing access to Paycheck Modeler is automatically turned on by the COBOL batch program. If an employee has accessed and is in the process of using Paycheck Modeler when the payroll process starts, an error message prevents them from performing further modeling until the production process completes.

Upon successful completion of the regular payroll calculation and confirmation processes, the COBOL batch program automatically turns off the batch run control flag, making Paycheck Modeler available again to all users in the defined company and pay group.

If the check box is deselected, the COBOL batch program ignores the batch run control flag, and users have full access to Paycheck Modeler while the batch processes are running.

Important! This setting only disables paycheck modeling during on-cycle processing.

Restore Access

This check box appears only when the payroll calculation or confirmation process is running or if the COBOL batch program fails.

Select the check box as an emergency measure to manually turn off the batch run control flag when the batch program fails, and re-enable users to access Paycheck Modeler.

If the batch program fails, the check box remains visible until it is either selected or the next payroll calculation or confirmation process completes successfully.

Access Options

You can disable access either permanently or for temporary periods of time.

Enable, Disable Fully, or **Disable Temporarily**

Select the option to control access to Paycheck Modeler:

- *Enable* Enables access to Paycheck Modeler for both payroll administrators and self-service employees.
- *Disable* Disables access to Paycheck Modeler for both payroll administrators and self-service employees.

  If a user tries to access Paycheck Modeler when it is disabled, they will receive a message indicating the modeler is unavailable and instructing them to contact the Payroll Department if they require information.
- *Disable Temporarily* Disables access to Paycheck Modeler for both payroll administrators and self-service employees for a pre-determined period of time. When this option is selected, the Disabled Periods group box becomes available for data entry. You must enter parameters there to identify the disablement period.

  If a user tries to access Paycheck Modeler when the functionality is temporarily disabled, they will receive a message indicating that the modeler is currently unavailable, and instructing them to try again later:

Disabled Periods

Start DateStart Time,End Date, and **End Time**	Enter parameters to identify the periods of time during which you want to temporarily disable Paycheck Modeler for system performance or other reasons. You can enter multiple date durations. All parameters are required.

Pay Group Parameters - Earnings Definition Page

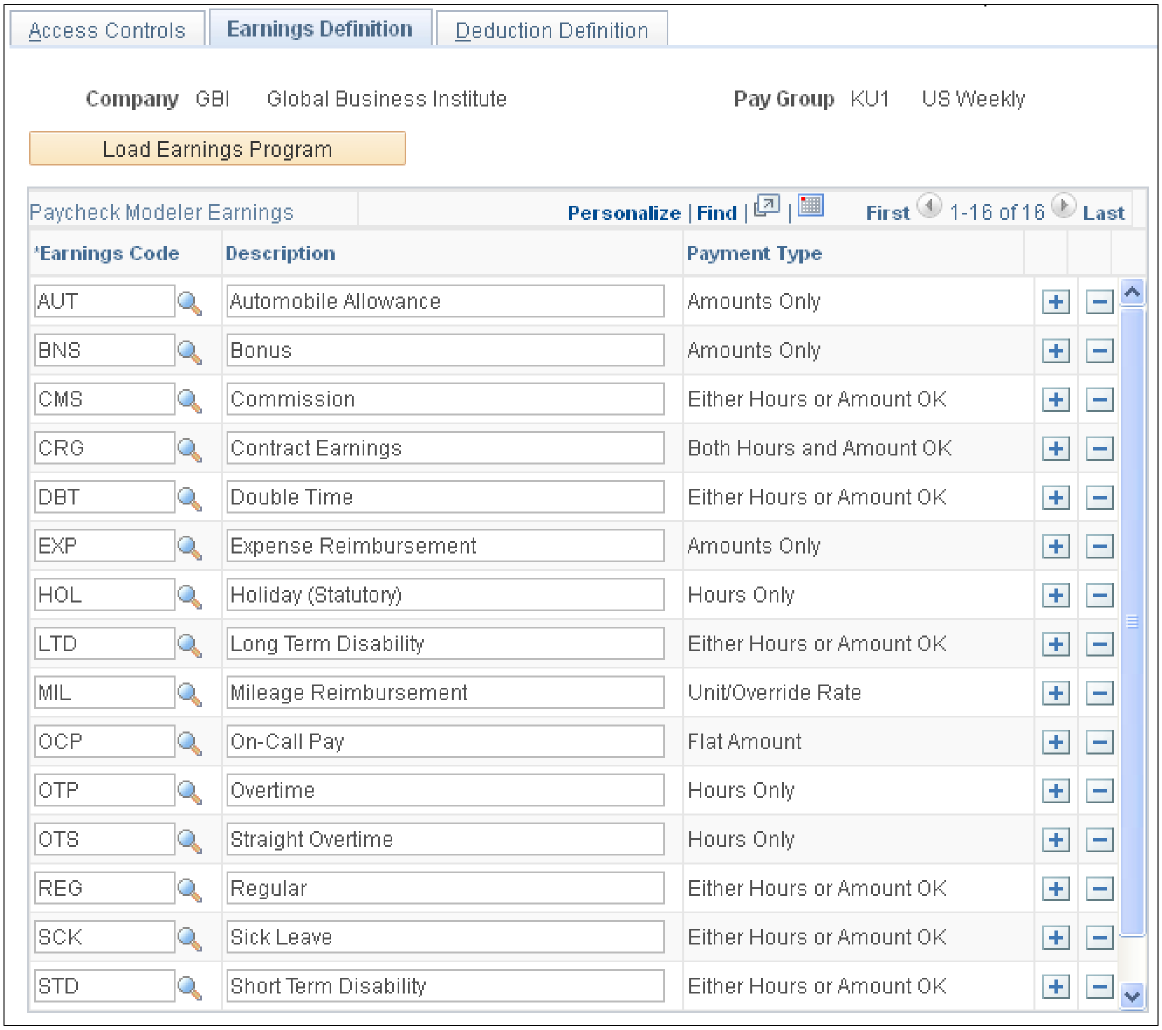
Use the Pay Group Parameters - Earnings Definition page (PY_MOD_ADM_ERNINGS) to define for each eligible company and pay group, the earnings that will be presented for selection by employees using Paycheck Modeler when adding earnings to the model paycheck.

Navigation

Setup HCM > Product Related > Payroll for North America > Paycheck Modeling USA > Pay Group Parameters > Earnings Definition Tab

Image: Pay Group Parameters - Earnings Definition page

This example illustrates the fields and controls on the Pay Group Parameters- Earnings Definition page.



*Earnings Code	Description	Payment Type
AUT	Automobile Allowance	Amounts Only
BNS	Bonus	Amounts Only
CMS	Commission	Either Hours or Amount OK
CRG	Contract Earnings	Both Hours and Amount OK
DBT	Double Time	Either Hours or Amount OK
EXP	Expense Reimbursement	Amounts Only
HOL	Holiday (Statutory)	Hours Only
LTD	Long Term Disability	Either Hours or Amount OK
MIL	Mileage Reimbursement	Unit/Override Rate
OCP	On-Call Pay	Flat Amount
OTP	Overtime	Hours Only
OTS	Straight Overtime	Hours Only
REG	Regular	Either Hours or Amount OK
SCK	Sick Leave	Either Hours or Amount OK
STD	Short Term Disability	Either Hours or Amount OK

The system uses earnings codes to identify the type of earnings that an employee is paid. Each earnings code consists of various compensation attributes dictating how the earnings will be handled. Use this table to identify and control the earnings codes that employees in the specified company and pay group can select for addition to their model paycheck.

Note: The model check assumes the employee's standard earnings and deductions. The earnings defined on this page are the earning that employees will be able to add to modeled checks in addition to their normal payroll calculation.

Load Earnings Program	(Optional) Select this button to populate the Paycheck Modeling Earnings grid with all of the earnings codes from the Earnings Program table that are associated with the specified pay group.

Paycheck Modeler Earnings

Earnings Code and **Description**	Enter the code and description for each earnings code that you want employees in the eligible company and pay group to be able to add to their model paycheck. Only the earnings codes

that are attached to the Earnings Program table associated with the specified pay group are available for selection.

The earnings code descriptions that appear here are from the Earnings Table and are used on the actual paychecks (PAY003), direct deposit advices (DDP003), and in Paycheck Modeler. Overriding a description here overrides it only for Paycheck Modeler. Earnings codes with the same description must be modified to uniquely identify each earnings code. All earning codes should be reviewed and updated for clarity and ease of use by self-service employees.

Pay Group Parameters - Deduction Definition Page

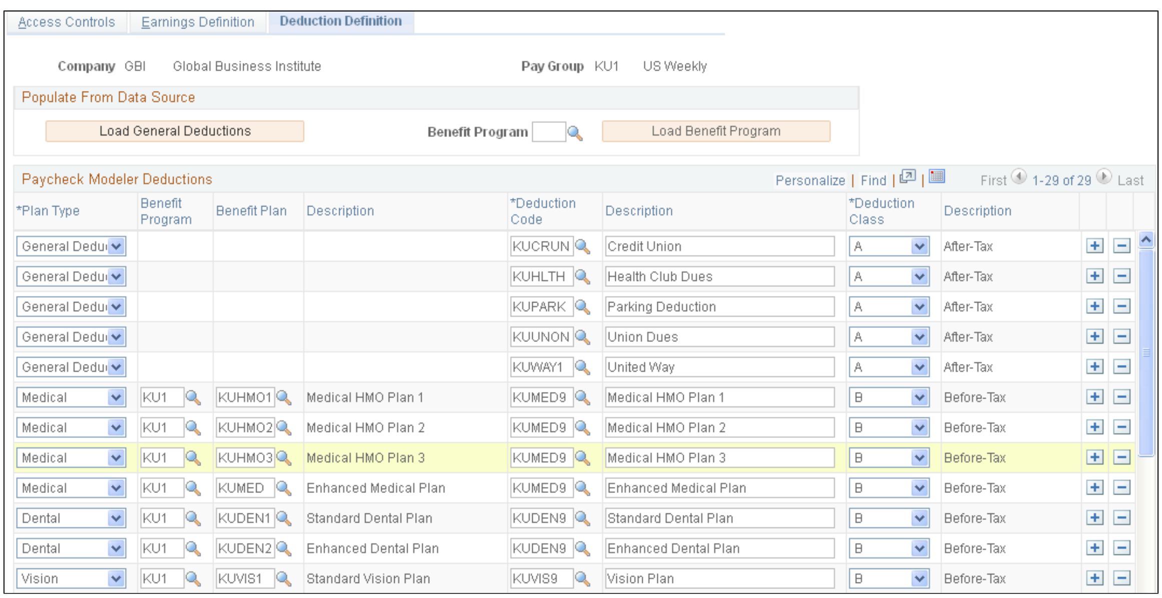
Use the Pay Group Parameters - Deduction Definition page (PY_MOD_ADM_DEDCTNS) to define for each eligible company and pay group, the deductions that will be presented for selection by employees using Paycheck Modeler when adding deductions to the model paycheck.

Navigation

Setup HCM > Product Related > Payroll for North America > Paycheck Modeling USA > Pay Group Parameters > Deduction Definition

Image: Pay Group Parameters - Deduction Definition page

This example illustrates the fields and controls on the Pay Group Parameters - Deduction Definition page.



Populate from Data Source

Use fields on the Pay Group Parameters - Deduction Definition page to identify and control the deduction codes that you want employees in the specified company and pay group to be able to add when modelling their paychecks.

Note: The model check assumes the employee's standard earnings and deductions. The deductions defined on this page are the deductions that employees will be able to add to modeled checks in addition to their normal payroll calculation.

Load General Deductions

(Optional) Select this button to populate the Paycheck Modeler Deductions grid with all of the deduction codes from the Company General Deductions table that are associated with the specified company.

Benefit Program and **Load Benefit Program**

(Optional) Specify the benefit program from which to clone all benefit plan deduction data, and then select the Load Benefit Program button to populate the Paycheck Modeling Deductions grid with that data.

Note: For initial setup, load the general deductions, load the benefit program, and save the page before making any other entries. Each time that you select the Load General Deductions or the Load Benefit Program button and save the results, the system clears all existing entries and populates the grid with results of the new selection. The Load General Deductions and Load Benefit Program functions are intended to assist with the initial setup of the Paycheck Modeler Deductions table.

Paycheck Modeler Deductions

Plan Type, Benefit Program, and **Benefit Plan**

Select a plan type, benefit program, and benefit plan for each deduction to use.

Deduction Code and **Description**

Enter the code and description for each deduction code that you want employees in the eligible company and pay group to be able to add to their model paycheck. Only the deduction codes that are attached to the Company General Deductions table associated with the specified pay group are available for selection. Because employees within one pay group can belong to a variety of benefit programs, all benefit plan deductions are available for selection.

Note: Garnishment deductions are not defined on the Deduction Definition page. A garnishment amount, if any, from the calculated check is included in the model check. The employee cannot add or update it, but they can delete it using either the modeler Clear Amount or Clear All Amounts functions.

The deduction code descriptions that appear here are from the Deduction Table and are used on the actual paychecks (PAY003), direct deposit advices (DDP003), and in Paycheck Modeler. Overriding a description here overrides it only for Paycheck Modeler. Deduction codes with the same description must be modified to uniquely identify each deduction code. All deduction codes should be reviewed and updated for clarity and ease of use by self-service employees.

Deduction Class

Select the deduction tax classification for the deduction code. To exclude a deduction, such as taxable benefits, from being available for update in Paycheck Modeler, you must exclude it from this table.

Understanding the Self-Service Paycheck Modeling Process

This overview describes what the payroll administrator should know to support the employee's self-service paycheck modeling page-by-page process.

Paycheck Modeling VFO

The self-service Paycheck Modeler end-user process is demonstrated in the following Oracle YouTube VFO (Video Feature Overview):

PeopleSoft Paycheck Modeler

Common Controls

The field and page controls described here behave the same throughout the self-service Paycheck Modeler component (PY_MOD_SS_MODELER).

Clear All Amounts

Deletes ALL amounts, making them zero, including the original *real* amounts and any that the user has entered from Paycheck Modeler.

To display the original, current pay calendar amounts again, users must exit Paycheck Modeler and start over.

Clear Amounts

Deletes the amount for the specific item, making the amount zero.

Edit

Displays an edit page where you can view and modify details for the specific item.

Next and **Previous**

Use these buttons (and not your browser's Back or Forward buttons), to step backwards or forwards through the steps while retaining session data.

Note: You can also click the link for any step (Earnings, Deductions, Taxes, and so on, except Start) to return to that step and move through the steps while retaining session data. To return to Start and the original data, you must exit and re-enter Paycheck Modeler.

Exit

Paycheck Modeler does not save data from session to session. Select Exit only when you are ready to leave Paycheck Modeler and all of the data that you have entered during the session.

When you enter Paycheck Modeler, the employee's original *(real)* amounts

for the current pay calendar appear.

Paycheck Modeler - Start Page

Text on the Paycheck Modeler - Start page (PY_MOD_SS_START) tells employees that they start with their standard earnings, deductions, and taxes and can change them to create a hypothetical check. The page requires that before the user can move forward, they must select the check box that shows they agree to the Usage Terms and Conditions. After that, they can select the Let's Get Started button.

When the employee selects the Yes, I have reviewed and agree to the terms and conditions check box, the system determines if the employe has one or multiple jobs. If the employe has only one job, the system retrieves the employee's earnings, deductions, and tax information, and calculates the employee's check ready to model. When the calculation completes and the single-job employee selects the Let's Get Started button, the employee is automatically transferred to the Paycheck Modeler - Earnings page. The multi-job employee is transferred to the Paycheck Modeler - Jobs page.

Paycheck Modeler - Jobs page

Paycheck Modeler can model only one paycheck for one job at a time. If the system determines that the employee has multiple jobs, then, when the employee selects the Yes, I have reviewed and agree to the terms and conditions check box, the system retrieves the multiple jobs information but does not yet prepare a calculated check to model. When the multiple-job employee clicks the Let's Get Startedbutton, the employee is transferred to the Paycheck Modeler - Jobs page (PY_MOD_SS_JOBS), a page that appears only for multiple-job employees between the Paycheck Modeler - Earnings page and Paycheck Modeler - Deductions page.

All of the employee's jobs that are available for paycheck modeling are available for selection on the Paycheck Modeler - Jobs page. The default job is the job for employment record 0, or the lowest numbered active employee record if job 0 is inactive or does not exist.

Users must select the job to use for the model check, and click the Prepare My Modeled Check button to trigger the initial payroll calculation for that job and prepare the check for modeling. After that, the user moves forward as any single-job employee would.

Paycheck Modeler - Earnings Page

Items listed on the Paycheck Modeler - Earnings page (PY_MOD_SS_EARNINGS) are the employee's standard earnings based on the standard hours in the Job Data record.

The additional earnings that are available to add to paycheck modeling are based on the earnings defined on the Pay Group Parameters - Earnings Definition Page.

The system retrieves and uses the employee's Job Data pay rate that was in effect on the pay period end date of the previously confirmed regular on-cycle paycheck.

Note: The model check does not include pay rate changes that may apply to the current pay period. As a result, existing employees cannot see current or future pay increases. Also, newly hired employees who are not active as of the pay period end date of the previously confirmed regular on-cycle paycheck cannot use Paycheck Modeler.

If *OK to Pay* is selected on the "Create Additional Pay Page" (PeopleSoft HCM 9.2: Payroll for North America), any additional pay that is applicable to the current pay period is included and calculated based on the employee's normal shift rate as defined on the job record. Additional pay items are not included in a modeled paycheck if they are paid on a separate check (any check greater than Addl Seq Nbr of *1* on the Create Additional Pay page).

Note: If the Add to Gross check box is deselected on the "Earnings Table - Taxes Page" (PeopleSoft HCM 9.2: Payroll for North America) (EARNINGS_TABLE2) for the earnings code, then the earnings amount appears on the model check, but it is not included in the Total Earnings.

Paycheck Modeler does not use the FLSA Alternate Overtime (FLSA/Alt OT) process. See "Create Additional Pay Page" (PeopleSoft HCM 9.2: Payroll for North America).

Earnings must be greater than zero to move forward.

Paycheck Modeler - Deduction Page

The items listed on the Paycheck Modeler - Deduction page (PY_MOD_SS_DEDUCTNS) are the employee's standard deductions that are scheduled to be taken in the next open calendar.

The additional deductions that are available to add to paycheck modeling are based on the deductions defined on the Pay Group Parameters - Deduction Definition Page.

Employees can use fields and controls in the My Deductions grid to add or modify flat amount or percentage-of-gross amount deductions to a model paycheck.

Following is an example of how the system calculates deductions based on a percent.

If no overrides are made to the 401K (add or edit), the deduction is calculated based on the deduction setup:

- If the deduction is based on a special accumulator, the amount in the special accumulator is used for the calculation.
- If the deduction is based on a percentage of gross, the deduction is calculated as a percent of total gross.

If the employee overrides the percent in Paycheck Modeler, the system uses percent of total gross.

Note: Employees can only clear the amount for a garnishment deduction. They cannot edit the amount in any other way. Garnishment calculations are based on the setup in the Garnishment Spec (garnishment specifications) component. See "Specifying Employee Garnishment Data" (PeopleSoft HCM 9.2: Payroll for North America).

Paycheck Modeler - Taxes Page

The tax jurisdictions that appear on the Paycheck Modeler - Taxes page (PY_MOD_SS_TAXES) are based on the employee's current tax information. Only the jurisdictions that allow withholding changes using a tax withholding form are available.

Employees can change their State Withholding Status if their current Special Withholding Tax Status is one of the following:

- *None*
- *Maintain Taxable Gross* (Only the Additional Amount is editable.)
- *Non-Resident Alien* (Employees cannot, however, change Tax Treaty information.)

The page says *Not Applicable* and no data appears if the employee has a tax status of *No Taxable Gross, No Tax Taken Status (exempt).*

Paycheck Modeler - Calculate Page

If the user has made changes, the Calculate My Modeled Check button is available on the Paycheck Modeler - Calculate page (PY_MOD_SS_CALC). The Next button remains unavailable until after the user selects the Calculate My Modeled Checkbutton. When the modeled check is calculated, a message appears and the Next button becomes available.

If the employee has made changes, only the Next button is available.

Paycheck Modeler - Results Page

Modeled check results appear on the Paycheck Modeler - Results page (PY_MOD_SS_RESULTS).

Note: Only employee amounts appear. Employer amounts are not part of a paycheck model.

Employees can:

- View a pie chart of the results.
- View totals and details of their modeled earnings, taxes, and deductions.
- Print a copy of the Modeled Paycheck. This report is a non-negotiable, unofficial copy of the estimated modeled check. It does not contain any information that identifies either the employee or the employer.
- Print a Paycheck Modeling Audit report to view the changes made this session.

Note: To print, popup blocker must be turned off.

Employees can use the Related Links on the Paycheck Modeler - Results page to access other paycheck related self-service pages.

Using the PeopleSoft Fluid User Interface to Manage Additional Payroll Information

This topic lists the pages that employees can access conveniently from a single location in the PeopleSoft Fluid User Interface to perform additional self-service transactions delivered in Payroll for North America. The navigation collection links described in this topic transfer users to the classic or classic plus version of the pages.

The Payroll tile provides access to fluid transactions that work with paychecks, tax withholding, electronic form consent, direct deposits, and so on; they are discussed in separate topics.

Pages Used to Manage Additional Payroll Information Using the PeopleSoft Fluid User Interface

Page Name	*Definition Name*	*Usage*
Payroll Tile	HC_PY_SS_NAVCOLL_FL (cref for the tile) PY_IC_WH_PTILE_FLU (page for dynamic data)	Access a collection of self-service payroll transactions, such as viewing voluntary deductions, modeling paychecks, and viewing paychecks of confirmed pay periods.
Voluntary Deductions	PY_IC_DED_LIST	Add, update, or view voluntary deductions. See Viewing and Updating Voluntary Deductions.
Paycheck Modeler	PY_MOD_SS_START	Calculate hypothetical paychecks based on earnings, deductions, and taxes entered in the modeling application. See Understanding Paycheck Modeler.
Pay Inquiry	PI_IC_CHK_DATA	View the paycheck information for any confirmed pay period. See Managing and Viewing Payroll Information.

Additional Self-Service Transactions Accessible from Payroll Tile

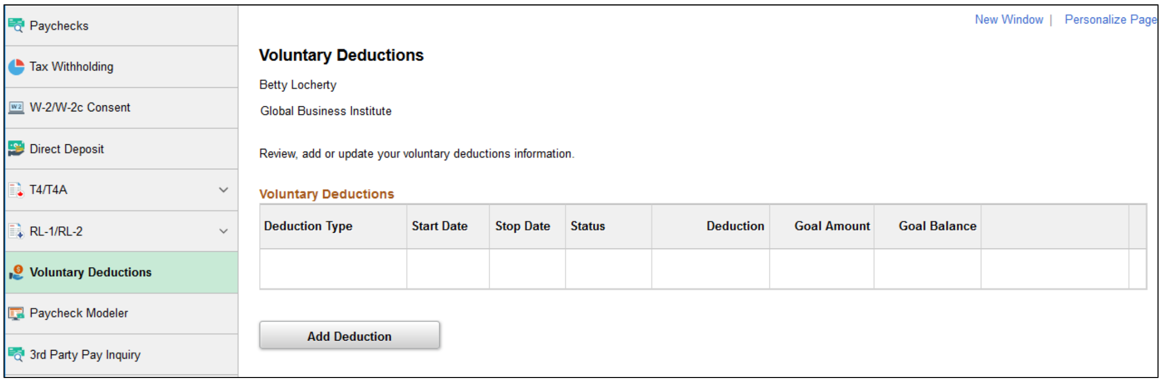
As an employee, you can access these payroll transactions using the Payroll tile:

- Voluntary Deductions.
- Payroll Modeler.
- 3rd Party Pay Inquiry.

Note: For optimal page display, Oracle recommends that you access these pages using large or medium form factors.

Image: Additional Self-Service Transactions Accessible from the Payroll Tile

This example illustrates additional self-service transactions on the left panel that are accessible from the Payroll Tile.



Related Links

Using the PeopleSoft Fluid User Interface to View Paychecks
Using the PeopleSoft Fluid User Interface to Update PDF Tax Forms
Understanding Year End Consent Pages
Using the PeopleSoft Fluid User Interface to Add and Modify Direct Deposit Accounts

(USA) Managing W-4 and W-2 Reissue

Pages Used to Manage W-4 and Reissued W-2 Forms

Page Name	***Definition Name***	***Usage***
(USA) W-4 Tax Information Page	PY_IC_W4_DATA	Employees can change tax data.
(USA) W-2 Reissue Request Page	PY_IC_W2_DATA	Employees request a new W-2 form and select the delivery address.

Understanding the W-4 Transaction

Employees can file a new Form W-4 through self service anytime that their tax status changes.

Using the self-service transaction, employees can:

- Change their federal tax data.
- Select the company for which they need to change data if they work for multiple companies.
- Specify an additional withholding amount.

Users are asked to confirm their password after updating the W-4. This functions as an employee's electronic signature. Workflow generates an email to the employee confirming that the change was made.

Note: The W-4 Tax Information self-service transaction does not work when WWW_AUTHENTICATION is used. With WWW_AUTHENTICATION, users receive a message on the final confirmation page that their password is invalid and are unable to save the W-4 changes. To use the W-4 Tax Information self-service transaction, you must use a different authentication method.

Understanding the W-2 Reissue Transaction

Employees can request a reissued W-2 form. Workflow associated with this transaction generates a worklist for the payroll administrator.

Chapter 4

Managing Pay Information for Global Payroll

Understanding ePay Transactions for Global Payroll

These ePay transactions are relevant to organizations that use PeopleSoft Global Payroll:

- Personal Bank Accounts (GP_SS_EE_BANK).

  Employees can enter and maintain their personal bank account information.

- Pay Distribution Instructions (GP_SS_EE_NPD).

  Employees can define their net pay distribution requirements.

- Banking (GPSC_BANK_ADD_FL)

  Employees can review, edit, and add bank account and payment distribution information using the PeopleSoft Fluid user interface.

- View Payslip (GP_SS_EE_PSLP).

  Employees can review paycheck information for earnings, taxes, deductions, and net pay distribution.

- Payslips (GP_SS_EE_PSLP_FLU)

  Employees can view payslips using the PeopleSoft Fluid user interface.

- (GBR) View Payslip GBR (GPGB_PSLIP_SS_PNLG).

  Employees can review payslips (PeopleSoft Global for the United Kingdom only).

- (JPN) Year-End Adjustment (YEA) Data (GPJP_YEA_SSERVICE).

  Employees can update their year-end adjustment data for YEA calculations (PeopleSoft Global Payroll for Japan only).

Setting Up Personal Bank Account Information

To define personal bank account information, use the Payee Bank Acct/Net Pay Dist (GP_SS_NPD_CONFIG_GBL) component.

Pages Used to Set Up Personal Bank Account Information

Page Name	***Definition Name***	***Usage***
Bank Table Page	BANK_EC	Set up general bank information that is needed to enable employee self-service transactions.
Branch Table Page	BANK_BRANCH_EC	Set up general bank branch information that is needed to enable employee self-service transactions.
Banking Instructions Page	GP_SS_NPD_CNF_INST	Create instructions that you want employees to see on pages in the Personal Bank Accounts component. These instructions override any default messages in the Message Catalog.

Understanding How to Define Personal Bank Account Information

The steps for setting up and entering personal account data are:

1. Before employees can use the self-service pages to enter personal bank information, the payroll administrator must set up general bank and bank branch information by using the Bank Table and Branch Table pages in PeopleSoft HCM.

2. If you want to replace default instructions that appear in the Personal Bank Accounts component (GP_SS_EE_BANK) with instructions that are specific to your company, define these instructions on the Banking Instructions page.

   The new instructions appear in place of default messages from the Message Catalog.

   Note: (GBR) If you are a United Kingdom user, specify additional instructions on the Banking Instructions page for employees that belong to building societies.

After general bank and bank branch information is set up, Global Payroll employees can enter personal bank information, such as bank locations and account types, bank and branch names, account names, account numbers, and currency codes. Employees enter this information by using the Personal Bank Accounts component.

Note: Any information that an employee enters in the Personal Bank Accounts component automatically updates the Maintain Bank Accounts page in the Global Payroll core application.

Related Links

"Understanding Bank and Bank Branch Setup" (PeopleSoft HCM 9.2: Application Fundamentals)
"Defining Banks and Branches" (PeopleSoft HCM 9.2: Global Payroll)
Updating Personal Bank Account Information

Banking Instructions Page

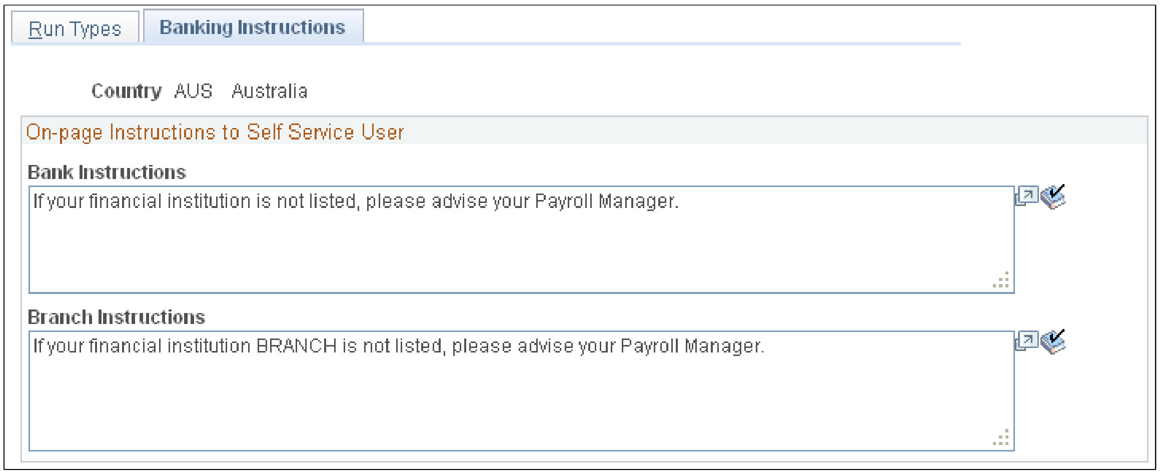
Use the Banking Instructions page (GP_SS_NPD_CNF_IN) to create instructions that you want employees to see on pages in the Personal Bank Accounts component. These instructions override any default messages in the Message Catalog.

Navigation

Set Up HCM > Product Related > ePay > Payee Bank Acct / Net Pay Dist > Banking Instructions

Image: Banking Instructions page

This example illustrates the fields and controls on the Banking Instructions page.



Bank Instructions

Enter a message that will appear directly above the list of banks from which a user can select on the self-service Select a Bank page.

Branch Instructions

If you set up bank branches by using the Branch Table page, when employees select a bank on the Select a Bank page, the system displays a list of available branches. Employees then see any instructions that you define here.

Note: This field is not available if the country is *GBR* or *USA*.

(GBR) Building Society Instructions

If an employee specifies *GBR* (Great Britain) in the Bank Location field and selects *Building Society Roll Number* in the Account Type field on the Bank Location and Account Type page, the Select a Building Society field appears, and displays the instructions that you define here.

Note: This field is available only if the country is *GBR*.

Updating Personal Bank Account Information

Pages Used to Update Personal Bank Account Information

Page Name	***Definition Name***	***Usage***
Personal Bank Accounts	GP_SS_EE_BANK	View any previously defined accounts and delete or edit earlier entries. After employees have defined their personal account information by using the Personal Bank Accounts component, they can select the Pay Distribution Instructions link. The system displays the Pay Distribution Instructions component (GP_SS_EE_NPD), where employees can define their net pay distribution. Any information that an employee enters in the Personal Bank Accounts component automatically updates the Maintain Bank Accounts page in the Global Payroll core application.
Bank Location and Account Type	GP_SS_EE_BANK_CTRY	Enter the country where the bank is located and select the account type.
(GBR) Select a Building Society	GP_SS_EE_BANK_BRC	(GBR) Select a building society. The system displays this page only when you select *GBR* in the Bank Location field and *Building Society Roll Number* in the Account Type field on the Bank Location and Account Type page. Otherwise, the Select a Bank page appears.
Select a Bank	GP_SS_EE_BANK_BNK	Select a bank.
Select a Branch	GP_SS_EE_BANK_BRC	Select a bank branch. If the bank that you select does not have any branches defined, the Add Account Details page appears instead of the Select a Branch page.

Page Name	Definition Name	Usage
Add Account Details	GP_SS_EE_BANK_DET	Add additional account details, such as the account name, account number, and currency code. (GBR) Enter building society roll name and roll number. (BEL, CHE, DEU, ESP, FRA, GBR, ITA, and NLD) Enter the international bank account number. (USA) If the bank is in the United States, indicate whether funds are actually going to a non-US bank.
(USA) Funds going to a non U.S. Bank	GP_SS_EE_BNK_HELP	Explains the use of the Funds going to a non U.S. Bank field.
Save Confirmation	GP_SS_SAVE_CONFIRM	Confirm that the personal bank account information is saved.
Edit Account Details	GP_SS_EE_BANK_DET	Edit account details, such as the account name, account number, and currency code.
Delete Confirmation	GP_SS_DEL_CONFIRM	Delete a personal bank account.

Setting Up Payment Instructions and Distribution Details

To define payment instructions and distribution details, use the Payee Bank Acct/Net Pay Dist (GP_SS_NPD_CONFIG_GBL) component.

Pages Used to Set Up Payment Instructions and Distribution Details

Page Name	Definition Name	Usage
Bank Table Page	BANK_EC	Set up general bank information that is needed to enable employee self-service transactions.
Branch Table Page	BANK_BRANCH_EC	Set up general bank branch information that is needed to enable employee self-service transactions.
Run Types Page	GP_SS_NPD_CONFIG	Set up the net pay distribution options that are available to employees in the self-service Pay Distribution Instructions transaction.

Understanding How to Set Up Payment Instructions and Distribution Details

To set up payment instructions and distribution details, the payroll administrator must:

1. Set up general bank and bank branch information by using the Bank Table and Branch Table pages.

2. Determine whether employees can define separate payment instructions and distributions for different run types, such as expenses and bonuses.

   If you configure the system so that users can specify different distributions for different run types, then users are required to select a run type before entering distribution details.

   Note: If employees have more than one job, they must also select the job for which they are entering distribution details.

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3. If the payroll administrator enables employees to define separate payment instructions and distributions for different run types, select a default election to use if the payee has no net distribution instructions for the run type.

4. Decide whether to lock net pay transactions so that employees cannot alter their distributions before or during a banking run.

The payroll administrator uses the ePay Run Types page to enter the decisions that are made in steps 2 through 4.

Run Types Page

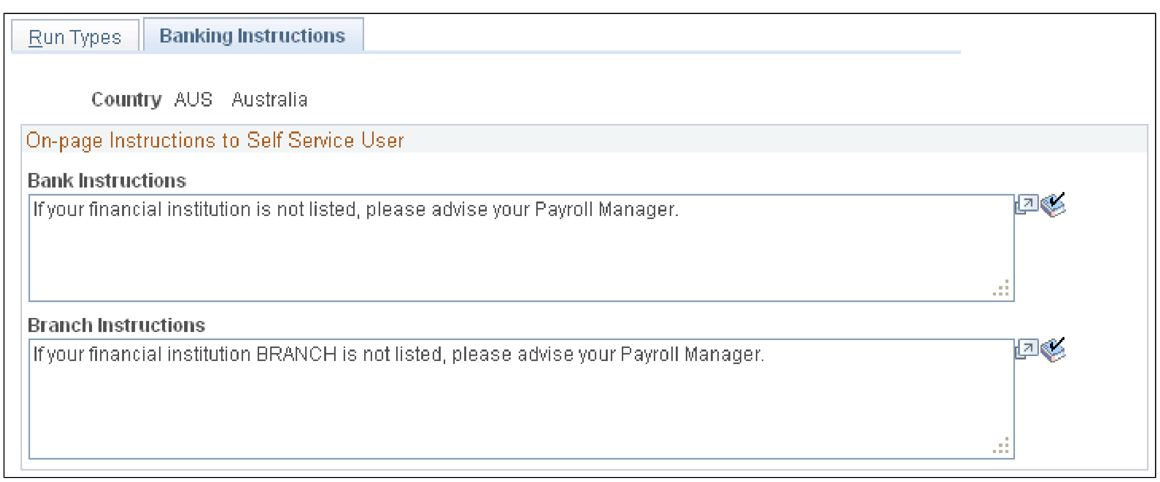
Use the Run Types page (GP_SS_NPD_CONFIG) to set up the net pay distribution options that are available to employees in the self-service Pay Distribution Instructions transaction.

Navigation

Set Up HCM > Product Related > ePay > Payee Bank Acct / Net Pay Dist > Run Types

Image: Run Types page

This example illustrates the fields and controls on the Run Types page.



Run Type	Select the run type for which you want to allow or prevent employees from entering distribution instructions. Only run types with a calculation type of payroll are listed. The Global Payroll security settings determine whether you can select run types designated for all countries or only selected countries. If you do not select run types on this page, employees see the following message when they access the Pay Distribution Instructions component: "There are no payroll types set up in the system which you can access. Please contact your Payroll Administrator." If you select only one run type, employees do not have to choose a run type before they define their distribution amounts and percentages. If you select more than one run type, employees must select a run type before they enter distribution instructions.
Default Election	Enables you to define the distribution options that are selected by an employee for a particular run type as a default distribution. The default works as follows: When you run the banking process, the system looks at the run type that is defined on the pay calendar. It then tries to find the net distribution selections that the employee has made for that run type in the Pay Distribution Instructions component. If the current run type does not have distribution instructions defined for it, the system uses the distribution amounts and percentage corresponding to the row marked as default election. If you choose a default run type, when employees go to the Payment Instruction Details page to enter their distribution amounts and percentages for that run type, the Use Payment Instructions for All Payroll Runs check box is selected. This lets employees know that the distributions that they make for that run type are used as the default election. Employees can override this default and set any other defaults that they want by deselecting the check box.
Net Pay Transaction Locked	Select this check box if you want to temporarily prevent employees from entering distribution instructions for this run type. For example, you might want to select this option while you are running the banking process. Doing so causes the following message to appear after the name of the run type in the Pay Distribution Instructions component: "Locked by Payroll Administrator − please try later."

Entering Payment Instructions and Distribution Details

Pages Used to Enter Payment Instructions and Distribution Details

Page Name	***Definition Name***	***Usage***
Select Job Title Page	GP_SS_EE_NPD_JOB	Select a job for which you want to enter distribution and payment instructions. The system displays this page only if the employee has multiple jobs. If the employee has only one job, the system displays the Select Type of Payroll page or the Pay Distribution Instructions page.
Select Type of Payroll Page	GP_SS_EE_NPD_RT	Select the run type for which you want to enter payment instructions and define distribution amounts and percentages. The system displays this page only if more than one run type is selected for distribution on the Run Types page. If only one run type is selected, the system displays the Pay Distribution Instructions page.
Pay Distribution Instructions Page	GP_SS_EE_NPD	View, delete, or edit any previously defined distributions and payment instructions, and add new distributions and payment instructions.
Select Distribution Method Page	GP_SS_EE_NPD_PAY	Select a payment method for which you want to distribute amounts or percentages.
Pay Distribution Instructions - Personal Bank Accounts Page	GP_SS_EE_BANK_SUMM	Select a bank account for which you want to distribute amounts or percentages.

Page Name	Definition Name	Usage
Distribution Instruction Details Page	GP_SS_EE_NPD_DET	Specify the priority and the amount or percentage of funds to be paid for the selected payment method. Distribution is processed in priority order. To change priority order when the priority has already been used, the original row with that priority must be changed first. Employees must specify an amount or a percentage, but cannot specify both. Employees can also leave both amount and percentage blank if they select the Use for any Remaining Pay check box. If Use for any Remaining Pay has been selected on a row, it cannot be selected on another row. The user would have to assign an amount or percentage to the original row before assigning the remaining pay to another account.
Delete Confirmation Page	GP_SS_DEL_CONFIRM	Delete a payment instruction.

Understanding How to Enter Payment Instructions and Distribution Details

After the payroll administrator has set up payment instructions and distribution details, employees can enter their own bank account information, payment instructions, and distribution details.

To enter personal bank account information, payment instructions, and distribution details, the employee:

1. (Optional) Uses the Personal Bank Accounts component to enter personal bank account information, first selecting a bank, then a branch, and then entering the account name and account number.

   The employee can select only those banks and branches that you have set up by using the Bank Table and Branch Table pages.

   The accounts defined here are those to which employees distribute their net pay in step two. If the employee does not have bank account information when the employee uses the Pay Distribution Instructions component (GP_SS_EE_NPD), the employee can add personal bank account information because the Personal Bank Accounts transaction is incorporated within the Pay Distribution Instructions transaction.

   Note: Any information that the employee enters in this component automatically updates the Maintain Bank Accounts page in the Global Payroll core application. The Maintain Bank Accounts page is designed to enable payroll departments to enter employee bank account information, while the Personal Bank Accounts component is designed as part of a self-service application that enables employees to enter their own account information online. Regardless of which page is used to enter account information, both pages display the most up-to-date account data because both pages reference the same bank table (PYE_BANKACCT).

2. Uses the Pay Distribution Instructions component to:

- Select bank transfer as the payment method and distribute electronic transfer payments between the various banks and accounts defined in step 1.
- Select check, postal order, or cash as the payment method to receive some or all of their earnings.

  Each user can specify one cash and one check distribution. The priority order determines the order of payment during processing.
- Specifies the priority order for each disbursement.

  The priority order determines the order of payment during processing.

If you configure the system so that employees can specify different distributions for different run types, then employees are required to select a payroll type before entering distribution details. If employees have more than one job, they must also select the job for which they are entering distribution details.

Note: Any information that employees enter on these pages automatically updates the Net Distribution page in the Global Payroll core application. The Net Distribution page was designed to enable payroll departments to define net distribution details, while the Pay Distribution Instructions component was designed as part of a self-service application, enabling employees to set their own distribution amounts and percentages online. Regardless of which page is used to enter pay distribution information, both pages display the most up-to-date pay distribution data because both pages reference the same bank tables (GP_NETDIST, GP_NETDIST_DT, and GP_NETDIST_DTL).

Setting Up Self Service Banking Options

Page Used to Set Up Self Service Banking Options

Page Name	***Definition Name***	***Usage***
Self Service Banking Options Page	GPSC_SSB_BANK	Define the options and field values available on the Fluid self service banking pages.

Understanding Self Service Banking Options

The Banking Page enables payees to review, edit, and add bank account and payment distribution information using the PeopleSoft Fluid User Interface. The Self Service Banking Options page enables you to define country-specific limitations on the options and field values that are available on the Banking Page.

Note: You can define options for the *ALL* country. These options apply to all countries by default. Any options that you define for specific countries override the options defined for *ALL*.

Self Service Banking Options Page

Use the Self Service Banking Options page (GPSC_SSB_BANK) to define the options and field values available on the Fluid self service banking pages.

Navigation

Set Up HCM >Product Related >ePay >Self Service Banking Options

Image: Self Service Banking Options page (1 of 2)

This example illustrates the fields and controls on the Self Service Banking Options page.

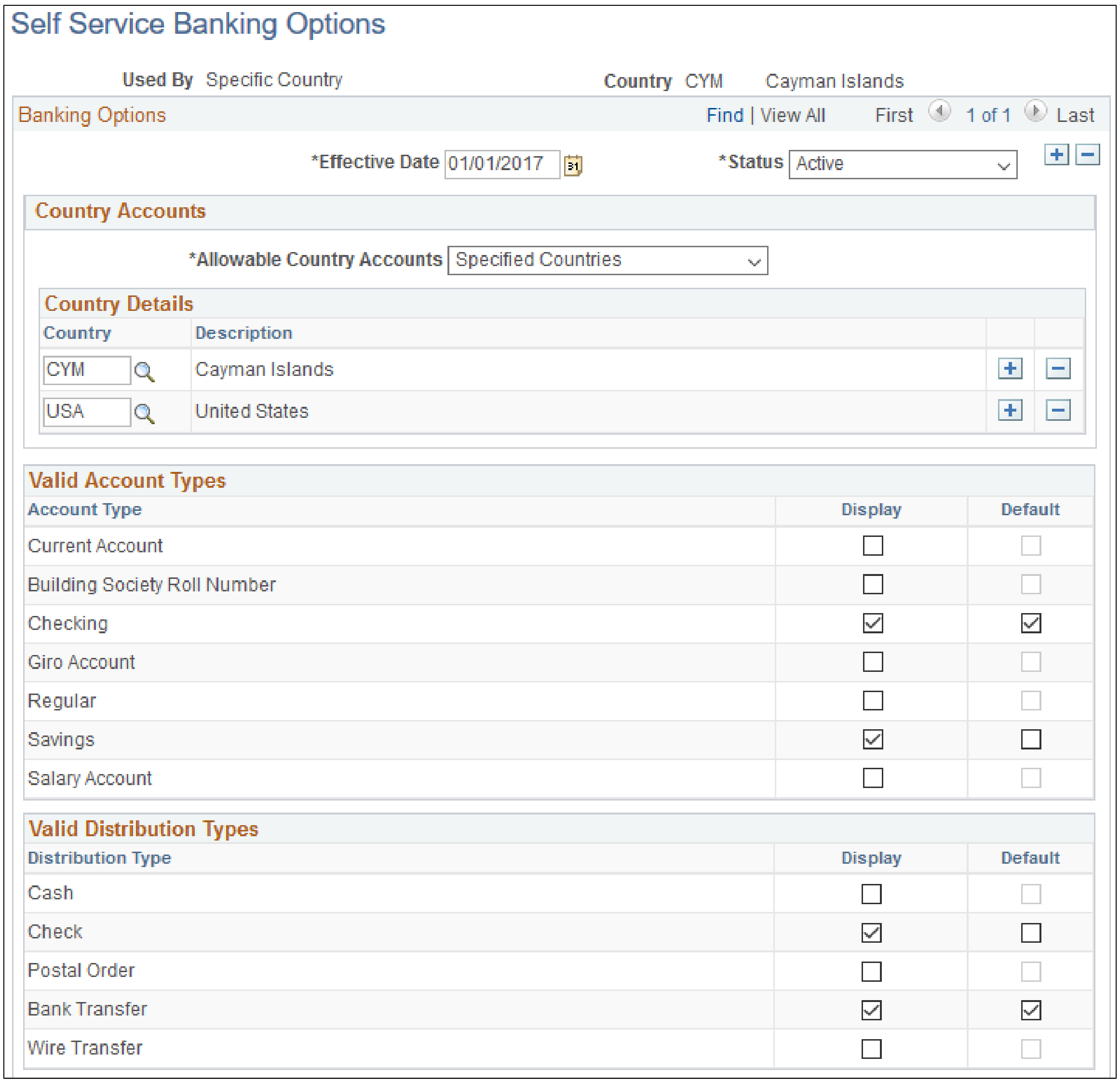
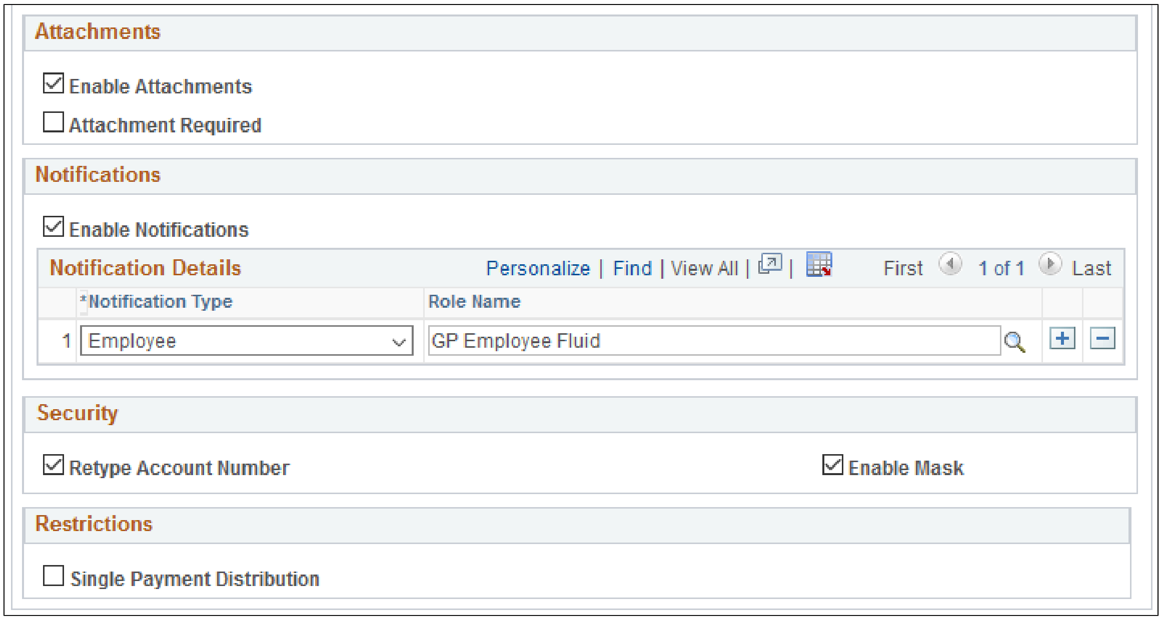


Image: Self Service Banking Options page (2 of 2)

This example illustrates the fields and controls on the Self Service Banking Options page.



Country Accounts

Allowable Country Accounts

Define the countries for which employees can create accounts. Values are:

- *Any Country:* Employees can create accounts for any country.
- *Home Country Only:* Employees can create accounts only for the country for which you are defining self service banking options.
- *Specified Countries:* Employees can create accounts for the countries that you specify. When you select this value, the Country Details grid becomes available.

Country Details

Enter the countries for which employees can create accounts.

Valid Account Types

Select the Display check box next to the bank account types that you want to be available for employees to create. Select the Default check box next to the type you want to be the default for new accounts.

Valid Distribution Types

Select the Display check box next to the payment distribution types that you want to be available for employees to create. Select the Default check box next to the type you want to be the default for new distributions.

Attachments

Enable Attachments	Select to enable employees to add attachments to their bank accounts. For more information on attachments see "Understanding Attachments" (PeopleSoft HCM 9.2: Application Fundamentals).
Attachments Required	Select to require employees to add an attachment when adding a new bank account.

Notifications

Enable Notifications	Select to generate notifications whenever bank account information is updated or added.
Notification Type	Enter the type of notification that the system sends: *Employee* or *Administrator*.
Role Name	Enter the security role that receives the notification.

Security

Retype Account Number	Select to require employees to retype account numbers when adding or editing bank account numbers.
Enable Mask	Select to mask account numbers so not all digits are displayed. For example, with this check box selected, the system would display the account number 123456789 as XXXXX6789.

Restrictions

Single Payment Distribution	Select to restrict employees to only one payment distribution.

Related Links

Using the PeopleSoft Fluid User Interface for Self Service Banking

Setting Up View Payslip

To set up View Payslip, use the Self Service Payslip Options (GP_SS_PSLP_OPTIONS_GBL) component.

Pages Used to Set Up View Payslip

Page Name	*Definition Name*	*Usage*
URL Maintenance Page	URL_TABLE	Stores URL addresses.
Self Service Payslip Options Page	GP_SS_PSLP_OPTIONS	Enable online payslip printing using the View Payslip self-service transaction, and enable mobile payslip access.

Understanding the View Payslip Transaction Setup

You can make employees' payslips available in PDF format in the View Payslips transaction (GP_SS_EE_PSLP). The system creates the PDF files when the Create Self Service Payslips Application Engine process (GP_EPAY) runs. This process is included as part of the PS Job process that you run from each country extension's payslip creation page.

As part of the payslip generation process, the system launches a series of processes that:

- Gather information and create a temporary file.
- Create a PDF file that is used to print the payslips.
- Split the PDF file into individual PDF files for each employee.

  These individual PDF files are stored on a secure server.

Important! When scheduling a process request for a payslip job, the following values can be used with ePay in the Type and Format fields on the Process Scheduler Request page: *None* and *None* (defaults to Web and PDF), *Web* and *PDF,* or *File* and *PDF.* If using *File* and *PDF,* do *not* use a custom output destination on the Process Scheduler Request page.

To set up the View Payslip transaction:

1. Define the URL identifier for the server that will store the individual PDF files.

   The Create Self Service Payslips process (GP_EPAY) uses this URL to identify where the PDF files are to be stored.

   You can use the default, GP_SS_PSLP_FTP, or you can create your own URL identifier.

2. Define the parameters for the View Payslip transaction.

   Using the Self Service Payslip Options page, you define:

   - The default URL identifier.
   - Whether to suppress printed payslips as a default.
   - When payslip information is available for employees to view.
   - Whether to override payslip information availability dates for one or more run types.

Prerequisites

Before you can set up the View Payslips transaction, you must:

1. Set up a secure FTP server to store the individual PDF payslip files.
2. Obtain the FTP URL from your environments engineers.
3. Set up payslips.

   Each country extension has instructions on how to set up payslips for that country.

URL Maintenance Page

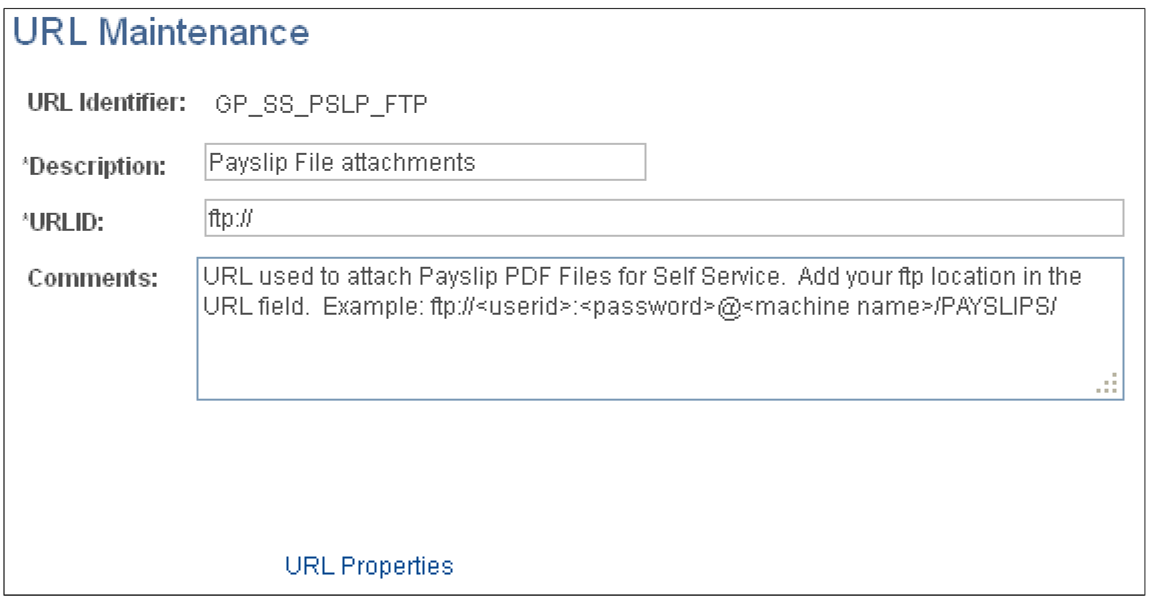
Use the URL Maintenance page (URL_TABLE) to store URL addresses.

Navigation

PeopleTools > Utilities > Administration > URLs > URL Maintenance

Image: URL Maintenance page

This example illustrates the fields and controls on the URL Maintenance page.



Important! If you are creating your own URL identifier to use instead of GP_SS_PSLP_FTP, you must update the Self Service Payslip Options page to reflect the new URL identifier.

URL	Enter the address for the location of the stored individual PDF files. Your environments engineers can provide this address.

Note: The format of your URL may not match the format of the example provided in the Comments field. The format of the address is dependent on the operating system you are using. You should contact your system administrator for the exact format of the URL.

Self Service Payslip Options Page

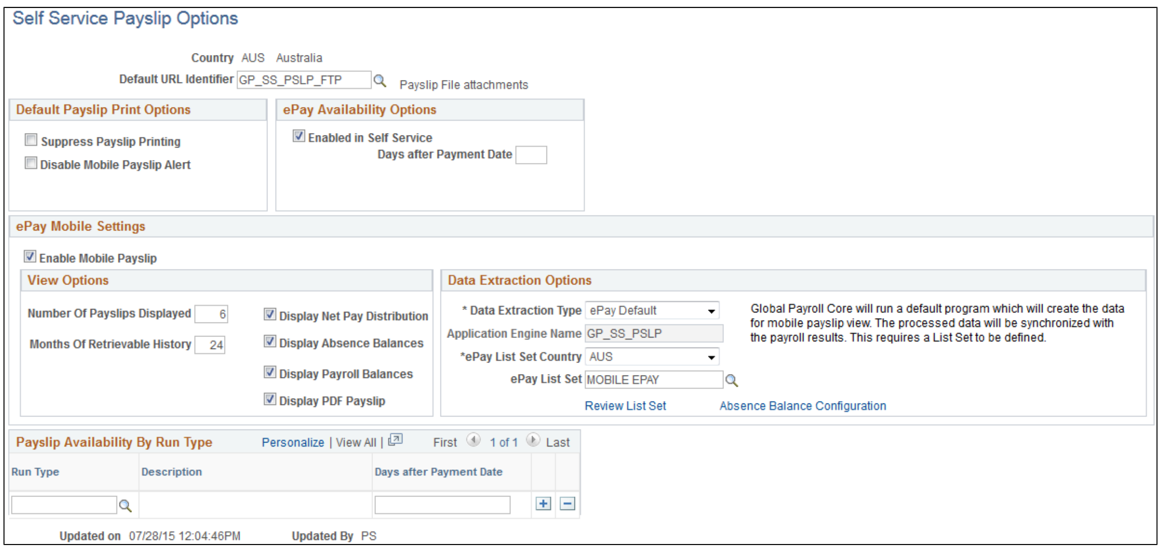
Use the Self Service Payslip Options page (GP_SS_PSLP_OPTIONS) to enable online payslip printing using the View Payslip self-service transaction, and to enable mobile access to payslips.

Navigation

Set Up HCM > Product Related > ePay > Self Service Payslip Options > Self Service Payslip Options

Image: Self Service Payslip Options page

This example illustrates the fields and controls on the Self Service Payslip Options page.



Default Payslip URL Identifier

Enter the URL identifier that contains the FTP URL where the PDF files for this country are stored.

The default URL identifier is GP_SS_PSLP_FTP. If you created your own URL identifier, you must make sure to enter that URL identifier here.

Default Payslip Print Options

Suppress Payslip Printing

Select this check box if you do not want payslips to be printed.

Note: If your country extension does not support the ability to suppress the printing of payslips, you should leave this check box deselected.

This check box serves as the default selection for your organization. It does not override existing individual payee settings.

ePay Availability Options

Enabled in Self Service

Select this check box if you want payees to control whether they receive a printed copy of their payslip, overriding the default selection that you enter on this page. If selected, the Paper Payslip Instructions group box displays on the View Payslips page.

Note: If your country extension does not support the ability to suppress the printing of payslips on an individual payee basis, you should leave this check box deselected.

Days after Payment Date

Specify when the payslip is available for viewing using View Payslip. The date determined using this information is the earliest date that the payslip is available; once this date has passed, the payslip is always available. You can enter:

- Zero to indicate that the payslips are available on the payment date.
- A number greater than zero to indicate the number of days after the payment date that payslips are available.
- A negative number to indicate the number of days before the payment date that payslips are available.

ePay Mobile Settings

Enable Mobile Payslip

Select to enable payees to access detailed information for their payslips using the PeopleSoft Fluid User Interface. When you select this check box, clicking a payslip on the Payslips Page accesses the Payment Summary Page.

Note: You can access the Payment Summary page and other mobile payslip pages only with small form factor devices, such as a smartphones. Clicking a payslip on the Payslips page using any other form factor device simply opens the payslip in PDF format.

When you select this check box, the fields in the View Options and Data Extraction Options group boxes become available.

View Options

Number of Payslips Displayed

Specify how many payslips you want displayed on the Payslips Page.

Months of Retrievable History — Specify the time period for which payees can access mobile payslip information.

Display Net Pay Distribution — Select to enable payees to access the Payment Distribution Page from the Payment Summary Page.

Display Absence Balances — Select to enable payees to access the Balances Page from the Payment Summary Page.

Display Payroll Balances — Select to enable payees to access the Payroll Balances Page from the Payment Summary Page.

Display PDF Payslip — Select to display the View PDF Payslip link on the Payment Summary Page.

Data Extraction Options

Data Extraction Type — Define the method the system uses to extract the data displayed for mobile payslips. Values are:

- *Call Using ePay Default:* If you select this value, Global Payroll calls the specified application engine as a part of ePay processing. The system does not execute the default Global Payroll delivered program . This option allows you to define your own processing logic.
- *Custom:* If you select this value, Global Payroll refers to the staging tables for mobile pay to extract data for mobile payslips. Select this option when you are using a country specific payslip process to populate the staging tables.

  Note: The *Custom* value is intended for customers who are already using ePay. If you are not using ePay and you select this value, you must manually populate the GP_SS_PSLP_GDE record to extract mobile payslip data.

- *ePay Default:* If you select this value, Global Payroll runs a default program that creates mobile payslip data. The system synchronizes the processed data with the payroll results. This requires you to define values for the ePay List Set Country and ePay List Set fields. When you select this value, the system automatically populates the Application Engine Name field with the Global Payroll Core application for ePay.

Application Engine Name — Enter the application engine that you want the system to use to extract payslip data. This field is available to edit only if you select the *Call Using ePay Default:* value in the Data Extraction Type field.

ePay List Set Country — Define the country for which you are selecting a list set.

ePay List Set — Define the list set that you are using to extract payslip data.

Review List Set	Click to access the "Define List Set Page" (PeopleSoft HCM 9.2: Global Payroll) where you can review and update the list set you selected in the ePay List Set field.
Absence Balance Configuration	Click to access the "Balances Page" (PeopleSoft HCM 9.2: Absence Management) where you can review and update the absence balance elements that the system displays for mobile payslips.

Payslip Availability By Run Type

Run Type and **Days after Payment Date**	If you want a run type to have a different payslip availability date than the default that is specified in the ePay Availability Options group box, enter the run type and then specify the number of days before or after the payment date that you want payslips to be available.

Viewing Payslips Online

Pages Used to View Payslips Online

Page Name	***Definition Name***	***Usage***
View Payslips	GP_SS_EE_PSLP	The employee selects the paycheck date to display the payslip as a PDF file. The employee can also instruct payroll whether to print a hard copy of the payslip.
Review Self Service Payslips	GP_SS_PSLP_ADMINVW	The payroll administrator reviews employee payslips to respond to employee questions. Select the employee by name or employee ID on the search page, then select the paycheck date to view the same payslip that the employee views in self service.

Understanding Online Views of Payslips

Employees can view their payslips using the View Payslip transaction. When the employee accesses the View Payslips page, the system displays all payslips available, listed 10 at a time. To display the detailed payslip, the employee selects the date link.

If the Enable Option in Self Service field is selected on the Self Service Payslip Options page, employees also have the option of indicating whether they want to receive a printed copy of their payslip.

To aid in resolving questions raised by employees about their payslips, the payroll administrator can view employees' self-service payslips in an online view that replicates the employees' view.

Reviewing Employee Payslips

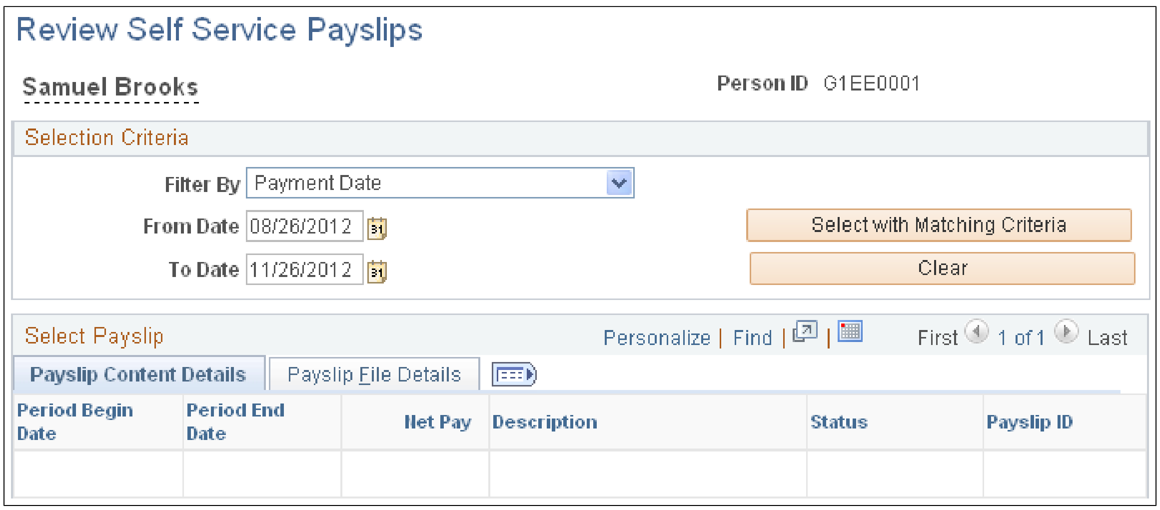
Payroll administrators use the Review Self Service Payslips page (GP_SS_PSLP_ADMINVW) to review employee payslips to respond to employee questions. They can select the employee by name or employee ID on the search page, then select the paycheck date to view the same payslip that the employee views in self service.

Navigation

Global Payroll and Absence Mgmt > Payslips > Review Self Service Payslips > Review Self Service Payslips

Image: Review Self Service Payslips page

This example illustrates the fields and controls on the Review Self Service Payslips page.



Selection Criteria

Filter By

Specify the criteria by which you want to filter payslips. The options are *Payment Date, Pay Period Begin Date,* or *Pay Period End Date.*

From Date and **To Date**

Enter the date range for the payslips that you want to view.

Note: You can specify an open date range by leaving one of the date fields blank.

Select with Matching Criteria

Select to generate a list of payslips based on the selection criteria you specify.

Clear

Select to clear the From Date and To Date fields along with any results listed in the Select Payslip group box.

Select Payslip

Status

Update the status for a payslip. Valid values are:

- *Original:* Indicates that this is the original payslip generated by the system.
- *Modified:* Indicates that the payslip was modified after it was originally generated.
- *Void-Hidden:* Indicates that the payslip has been voided and is not visible to the payee through self-service.
- *Void-Deleted:* Indicates that the payslip was invalid and has been deleted. It is not visible to the payee through self-service.
- *Void-Display:* Indicates that the payslip has been voided and is visible to the payee through self-service.

(GBR) Viewing Payslips Online

Page Used to View Payslips Online

Page Name	***Definition Name***	***Usage***
Payslips Page	GPGB_PSLIP_SS_LIST	Employees use this page to view their payslips when payroll has been finalized.

Prerequisites

Setup of the U.K. payslip is managed in Global Payroll for the U.K. This is discussed in the product documentation for PeopleSoft Global Payroll for the United Kingdom.

Before employees can view their payslips, you must run the payslip process, which produces the payslips.

Related Links

"Generating Payslips" (PeopleSoft HCM 9.2: Global Payroll for the United Kingdom)

"Viewing Payslips" (PeopleSoft HCM 9.2: Global Payroll for the United Kingdom)

Using the PeopleSoft Fluid User Interface to View Payslips

This topic discusses how employees use the PeopleSoft Fluid User Interface to view PeopleSoft Global Payroll payslips.

These videos provide demonstrations and information about this topic:

PeopleSoft HCM 9.2 Image 18 Highlights: Mobile Payslip for Multiple Countries

PeopleSoft HCM 9.2 Image 19 Highlights: Mobile Payslip Country Extension Implementations

For general information about fluid pages in PeopleSoft HCM, see "Understanding PeopleSoft Fluid User Interface Home Pages" (PeopleSoft HCM 9.2: Application Fundamentals)

Pages Use to View Payslips Using the PeopleSoft Fluid User Interface

Page/Tile Name	***Definition Name***	***Usage***
Payslips Tile	HC_GP_SS_EE_PSLP_FLU (cref for the tile) GPEE_PSLIPTILE_FLU (page for dynamic data)	Access employee self-service payslip information.
Payslips Page	GP_SS_EE_PSLP_FLU	View summary information about recent payslips.
Filter Page	PY_ESS_FLTRDAT_SCF	After clicking the Filter icon on the Payslips page, enter new from and to dates to change the date range of payslips to display.
Payment Summary Page	GP_MPSLP_PMT_SUMM	View a summary of information for a payslip.
Earnings Page	GP_MPSLP_ERNG	View the earnings for a payslip.
Deductions Page	GP_MPSLP_DEDN	View the deductions for a payslip.
Payment Distribution Page	GP_MPSLP_PMT_DST	View the net pay distribution for a payslip.
Payroll Balances Page	GP_MPSLP_PAYBAL	View year-to-date payroll balances for a payslip.
Balances Page	HGA_SS_BAL_FLU	View absence balances for a payslip.
Payslip Analytics Page	GP_MPSLP_CHRT	View how the ratios of the earnings and deductions associated with a payslip.

Payslips Tile

Employees use the Payslips tile to access their payslip information.

Navigation

The Payslips tile is delivered as part of the "Employee Self-Service Home Page" (PeopleSoft HCM 9.2: Application Fundamentals), but the location can change if you change the delivered home pages or if employees personalize their home pages.

Image: (Tablet) Payslips tile

This example illustrates the Payslips tile for the tablet.

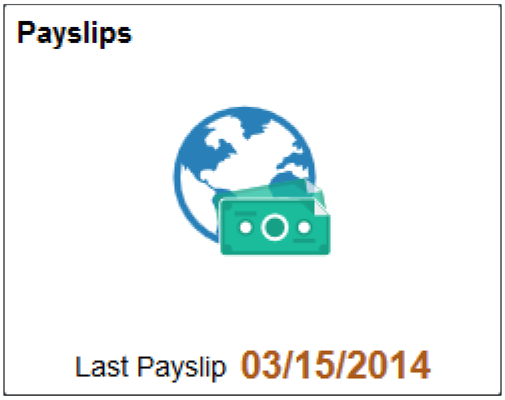
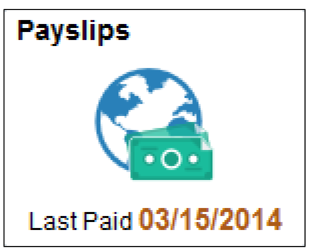


Image: (Smartphone) Payslips tile

This example illustrates the Payslips tile for the smartphone.



Click anywhere on this tile to access the Payslips page, which displays summary information about the employee’s most recent payslips.

Last Payslip or **Last Paid**	Displays the date of the employee’s most recent payslip in the user’s preferred date format.

Payslips Page

Use the Payslips page (GP_SS_EE_PSLP_FLU) to view summary information about recent payslips.

Navigation

- Click the Payslip tile on a PeopleSoft Fluid User Interface home page.

  The Payslip tile is on the delivered Employee Self-Service home page.

- Self Service >Payroll and Compensation >Payslips

Image: (Tablet) Payslips page

This example illustrates the Payslips page for the tablet.

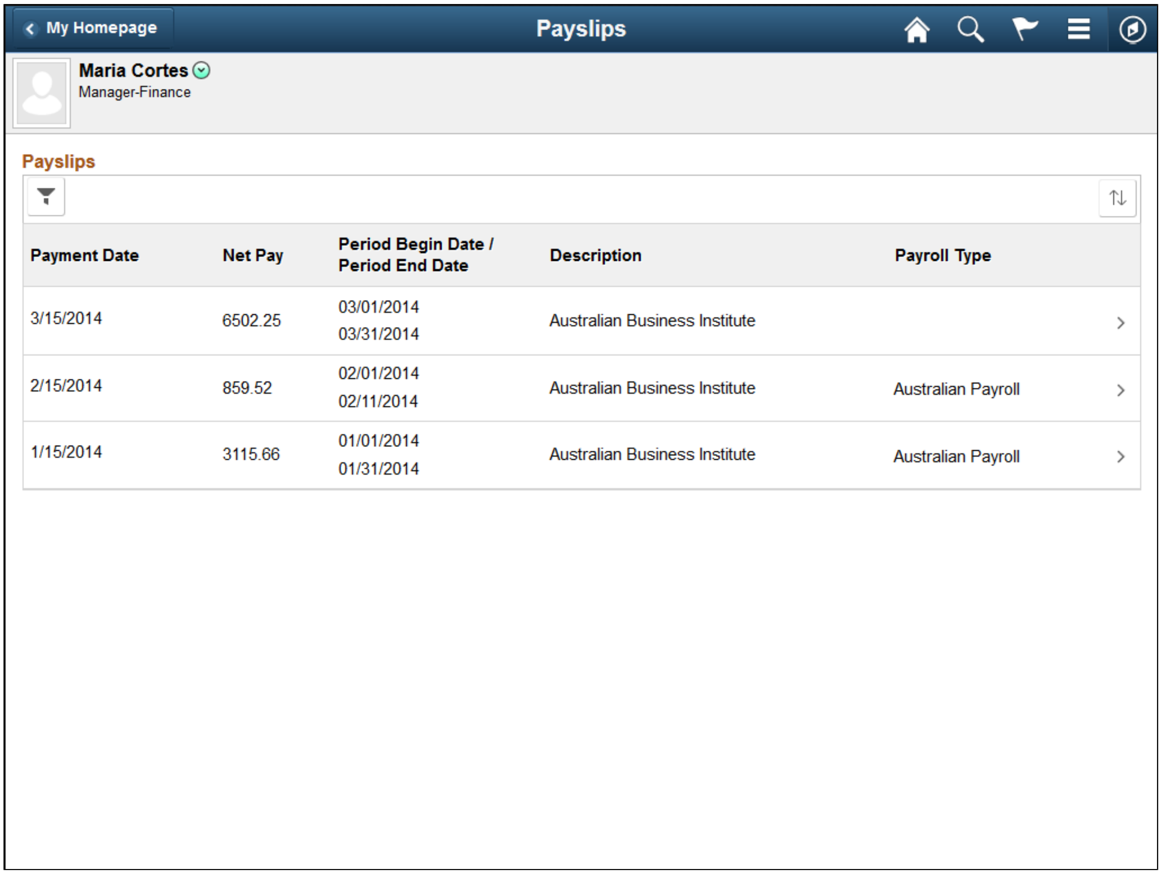
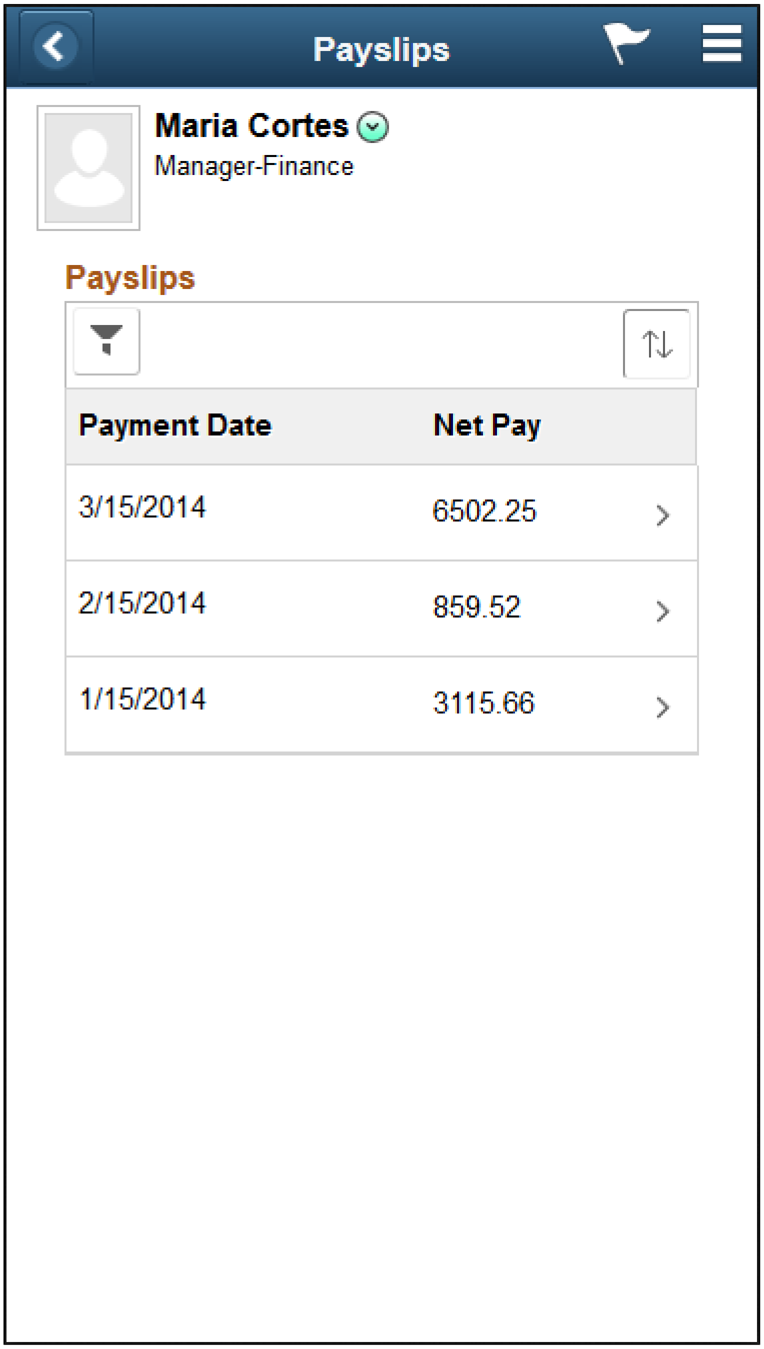


Image: (Smartphone) Payslips page

This example illustrates the Payslips page for the smartphone.



Header Information

The page header includes the employee's name, job title, and photo (if available). Employees can click the related actions drop-down icon next to their name to access additional self-service transactions.

See "Common Header for Employee Self-Service Pages" (PeopleSoft HCM 9.2: Application Fundamentals)

Date Range for Payslips

Initially, the Payslips page displays the most recent payslip and the previous six months of payslips. To display payslips from a different date range, employees can click the filter icon and enter new dates in the From and To fields, and then click the Refresh button.

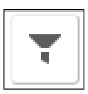
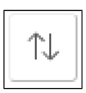
Dates appear in the user’s preferred format.

Grid Columns and Sorting

The grid on this page displays the following information about each payslip:

- Payment Date
- Net Pay
- Period Begin Date
- Period End Date
- Description

  The description varies by country. For example, it might describe the department, pay entity, calendar run, or job title.
- Payroll Type

	To change the date range of payslips to display, click the filter icon and enter new from and to dates.
 **Grid Sort**	Initially, payslips are sorted chronologically, with the most recent payslip first. To change the sort order, click the grid sort icon and choose a new sort option. You can sort by any field that is shown in the grid.

Accessing Payslip Details

If mobile payslips are enabled on the Self Service Payslip Options Page and you are using a small form factor device such as a smartphone, you can click a payslip to access the Payment Summary Page where you can view a summary of information for the payslip and access more detailed information.

If mobile payslips are not enabled, or you are not using a small form factor device, clicking a payslip opens the payslip in PDF format.

Payment Summary Page

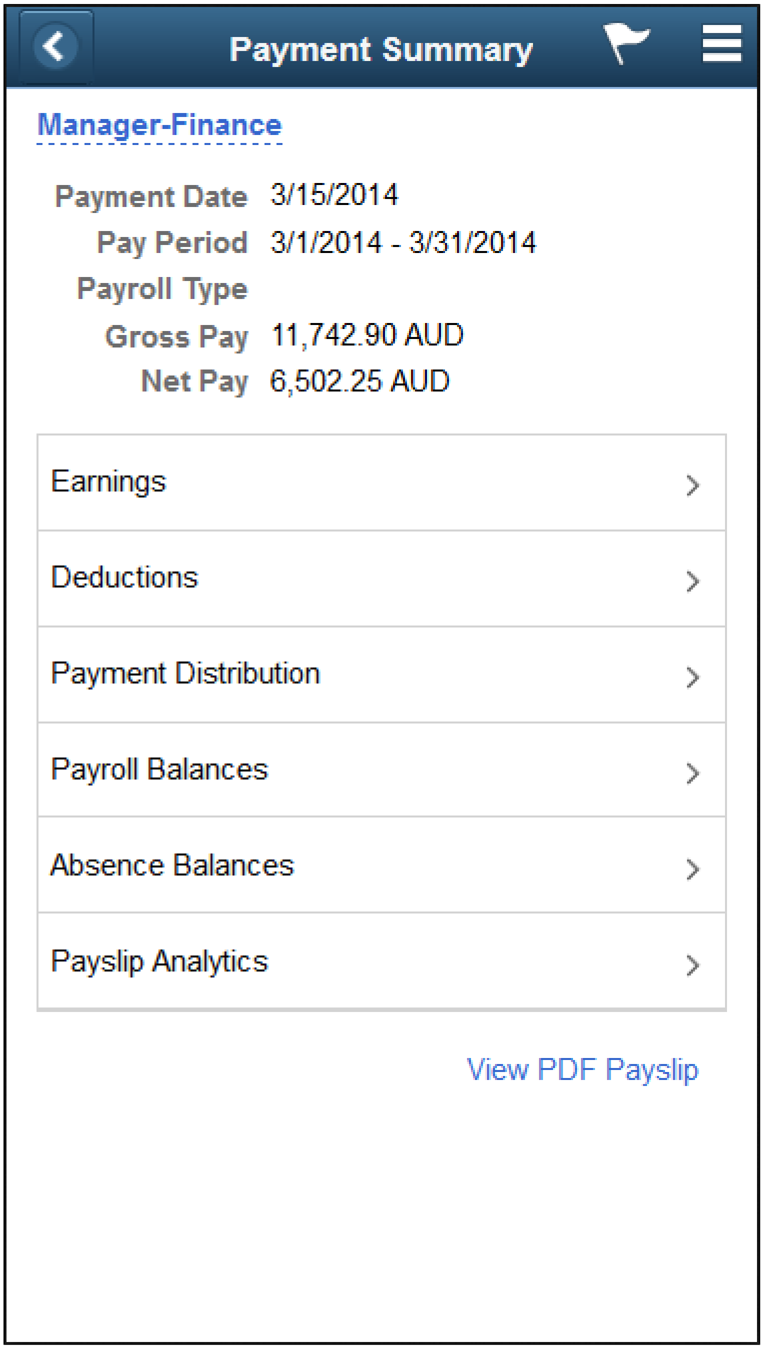
Use the Payment Summary page (GP_MPSLP_PMT_SUMM) to view a summary of information for a payslip.

Navigation

Click a payslip on the Payslips page using a small form factor device.

Image: Payment Summary page

This example illustrates the Payment Summary page for the smartphone.



This page displays the following information for the payslip:

- Payment Date
- Pay Period
- Payroll Type
- Gross Pay

- Net Pay

Earnings	Click to access the Earnings Page.
Deductions	Click to access the Deductions Page.
Payment Distribution	Click to access the Payment Distribution Page.
Payroll Balances	Click to access the Payroll Balances Page.
Absence Balances	Click to access the Balances Page.
Payslip Analytics	Click to access the Payslip Analytics Page.
View PDF Payslip	Click to view the payslip in PDF format. Refer to the topic Setting Up View Payslip for additional information about generating the PDF payslips for employees.

Earnings Page

Use the Earnings page (GP_MPSLP_ERNG) to view the earnings for a payslip.

Navigation

Click the Earnings item on the Payment Summary page.

Image: Earnings page: Summary tab

This example illustrates the Earnings page: Summary tab for the smartphone.

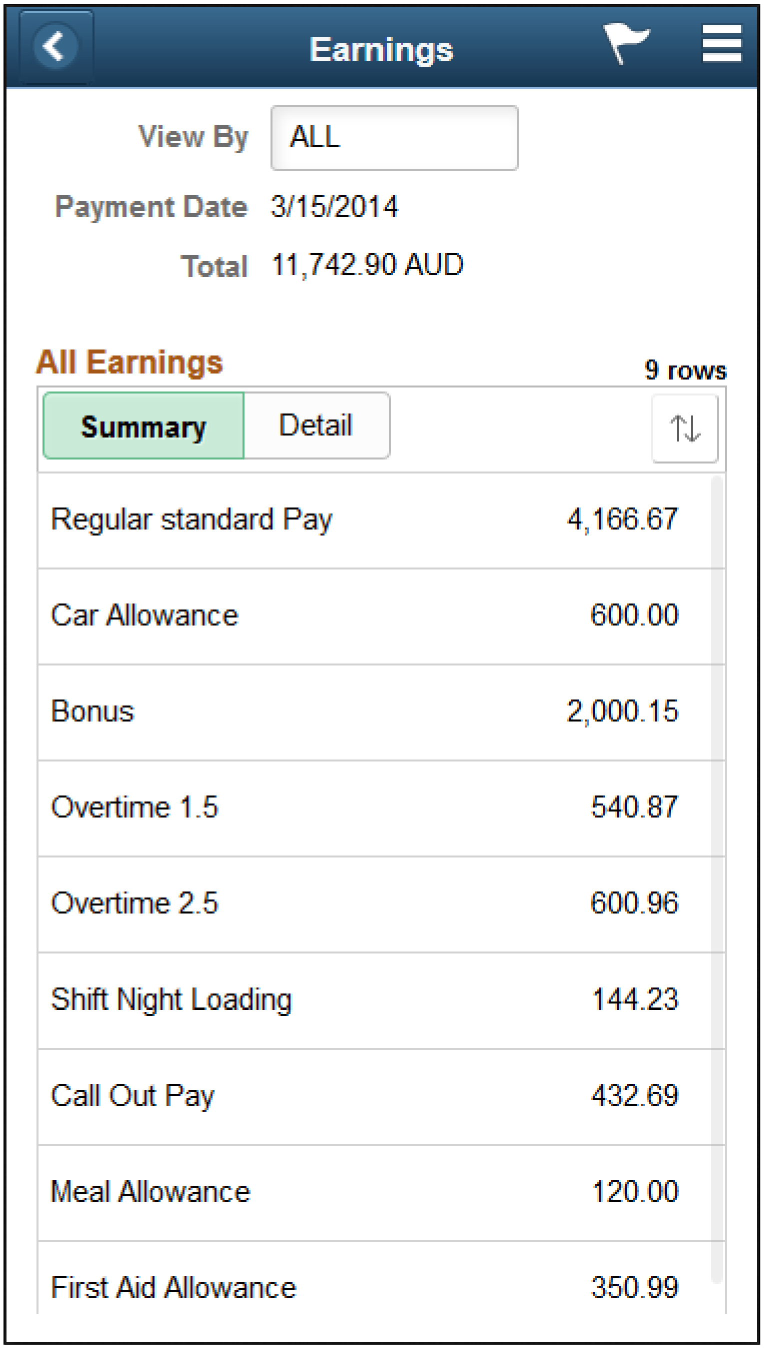
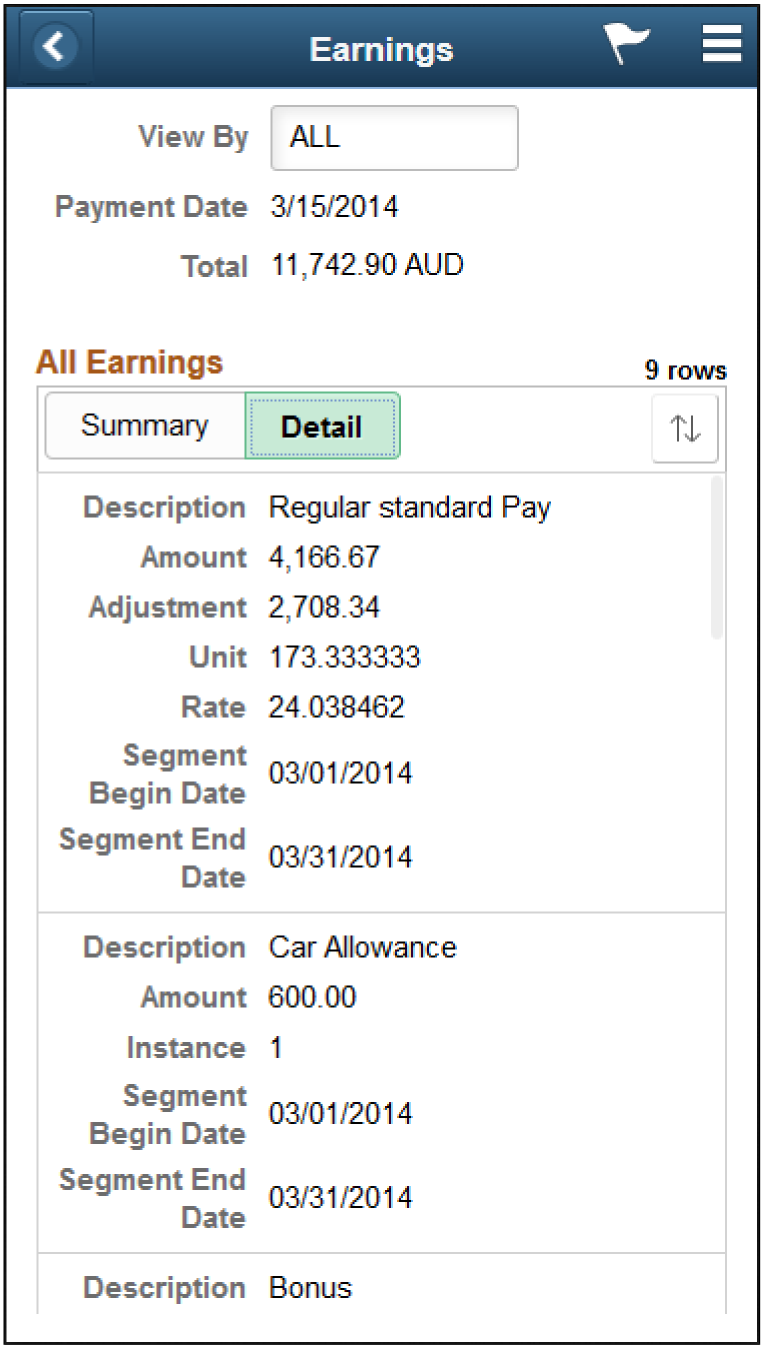


Image: Earnings page: Detail tab

This example illustrates the Earnings page: Detail tab for the smartphone.



Summary

This tab displays a brief summary of each earning associated with the payslip including:

- Description
- Amount

Detail

This tab displays the detailed information for each earning including:

- Description
- Amount
- Instance
- Segment Begin Date
- Segment End Date

Deductions Page

Use the Deductions page (GP_MPSLP_DEDN) to view the deductions for a payslip.

Navigation

Click the Deductions item on the Payment Summary page.

Image: Deductions page: Summary tab

This example illustrates the Deductions page: Summary tab for the smartphone.

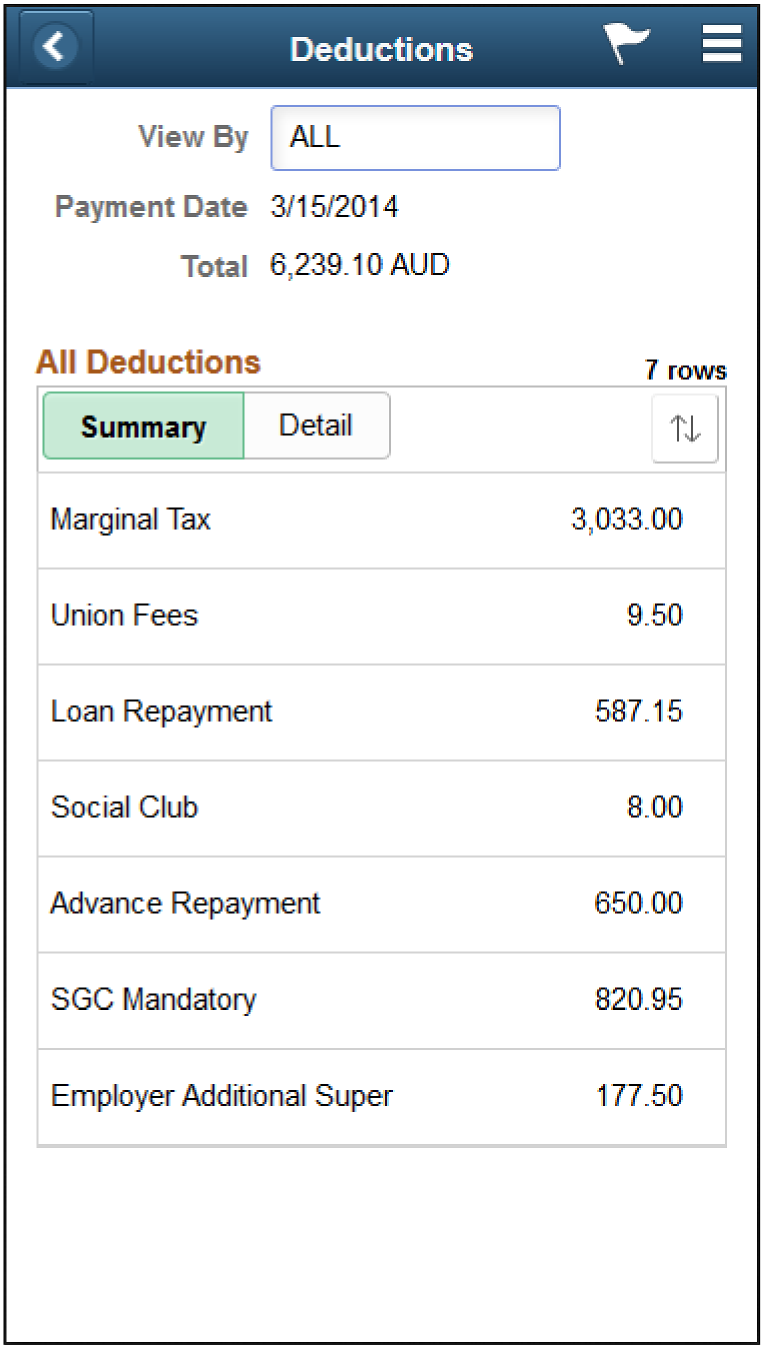
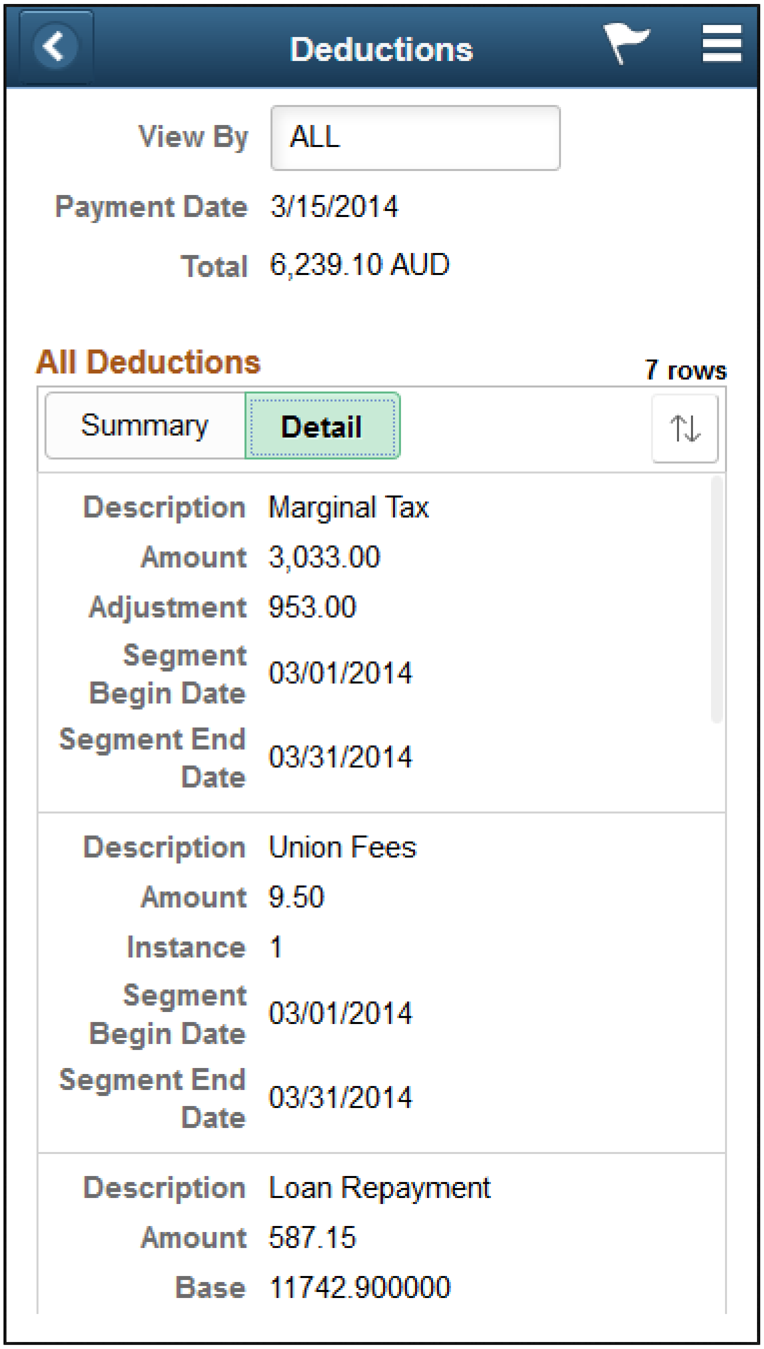


Image: Deductions page: Detail tab

This example illustrates the Deductions page: Detail tab for the smartphone.



Summary

This tab displays a brief summary of each deduction associated with the payslip including:

- Description
- Amount

Detail

This tab displays the detailed information for each earning including:

- Description
- Amount
- Instance
- Segment Begin Date
- Segment End Date

Payment Distribution Page

Use the Payment Distribution page (GP_MPSLP_PMT_DST) to view the net pay distribution for a payslip.

Navigation

Click the Payment Distribution item on the Payment Summary page.

Image: Payment Distribution page: Summary tab

This example illustrates the Payment Distribution page: Summary tab for the smartphone.

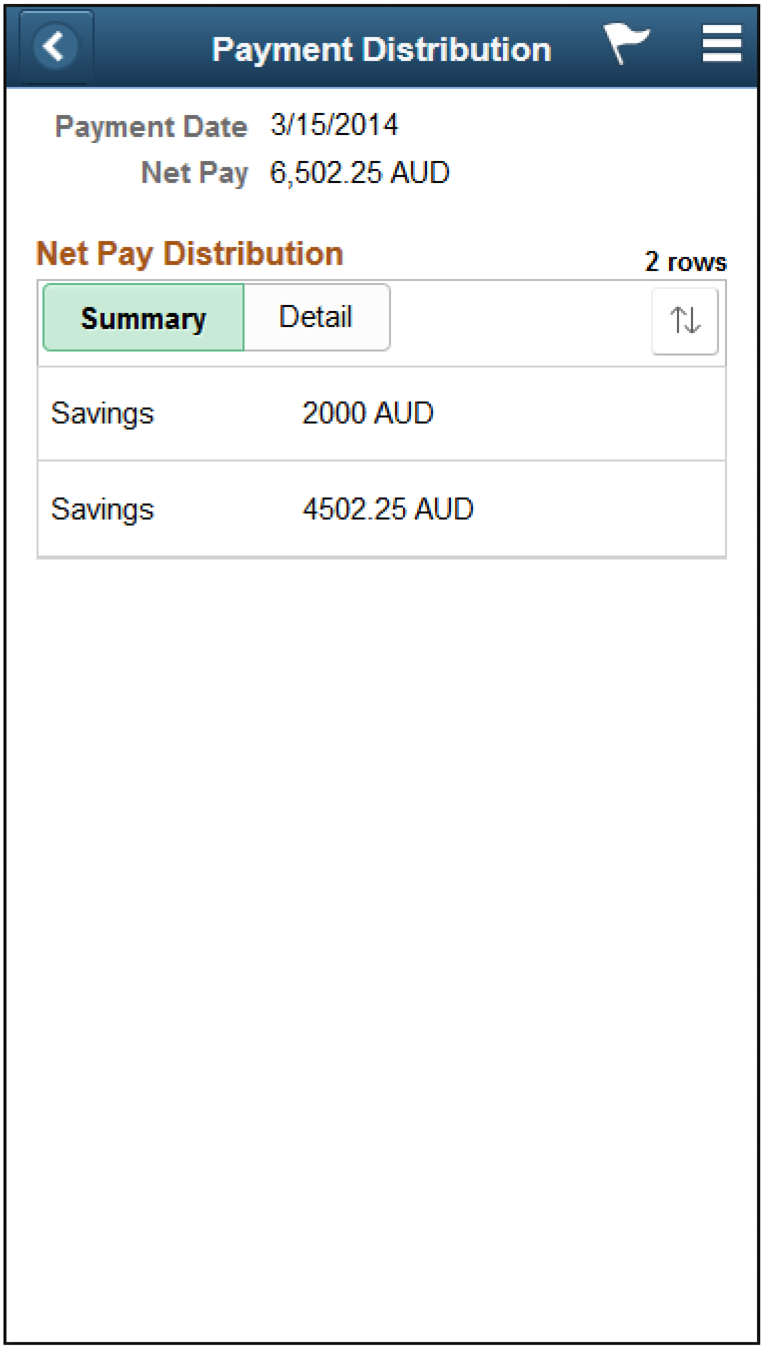
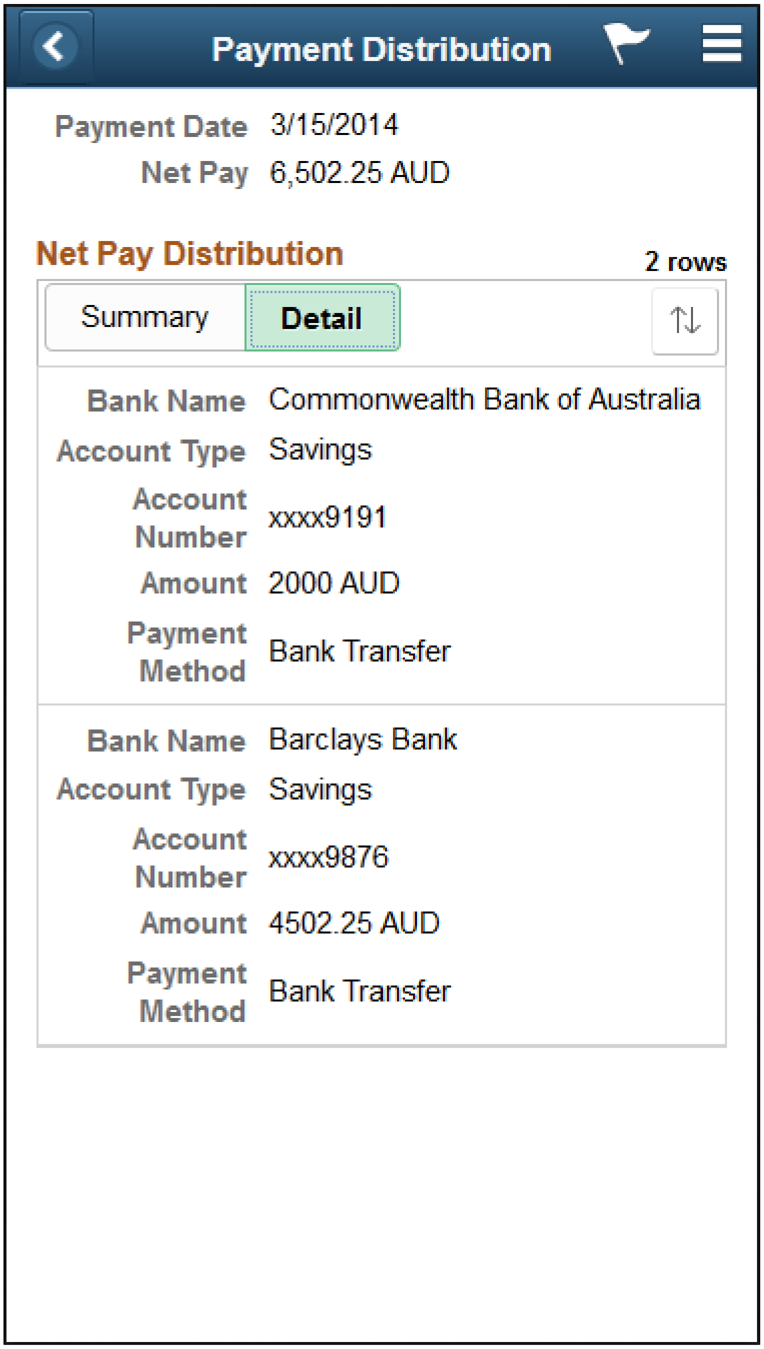


Image: Payment Distribution page: Detail tab

This example illustrates the Payment Distribution page: Detail tab for the smartphone.



Summary

This tab displays a summary of each bank account to which net pay was distributed. The summary includes:

- Account Type
- Amount

Detail

This tab displays detailed information for each bank account to which net pay was distributed. The detailed information includes:

- Bank Account Name
- Account Type
- Account Number
- Amount
- Payment Method

Payroll Balances Page

Use the Payroll Balances page (GP_MPSLP_PAYBAL) to view payroll balances for a payslip.

Navigation

Click the Payroll Balances item on the Payment Summary page.

Image: Payroll Balances page: Summary tab

This example illustrates the Payroll Balances page: Summary tab for the smartphone.

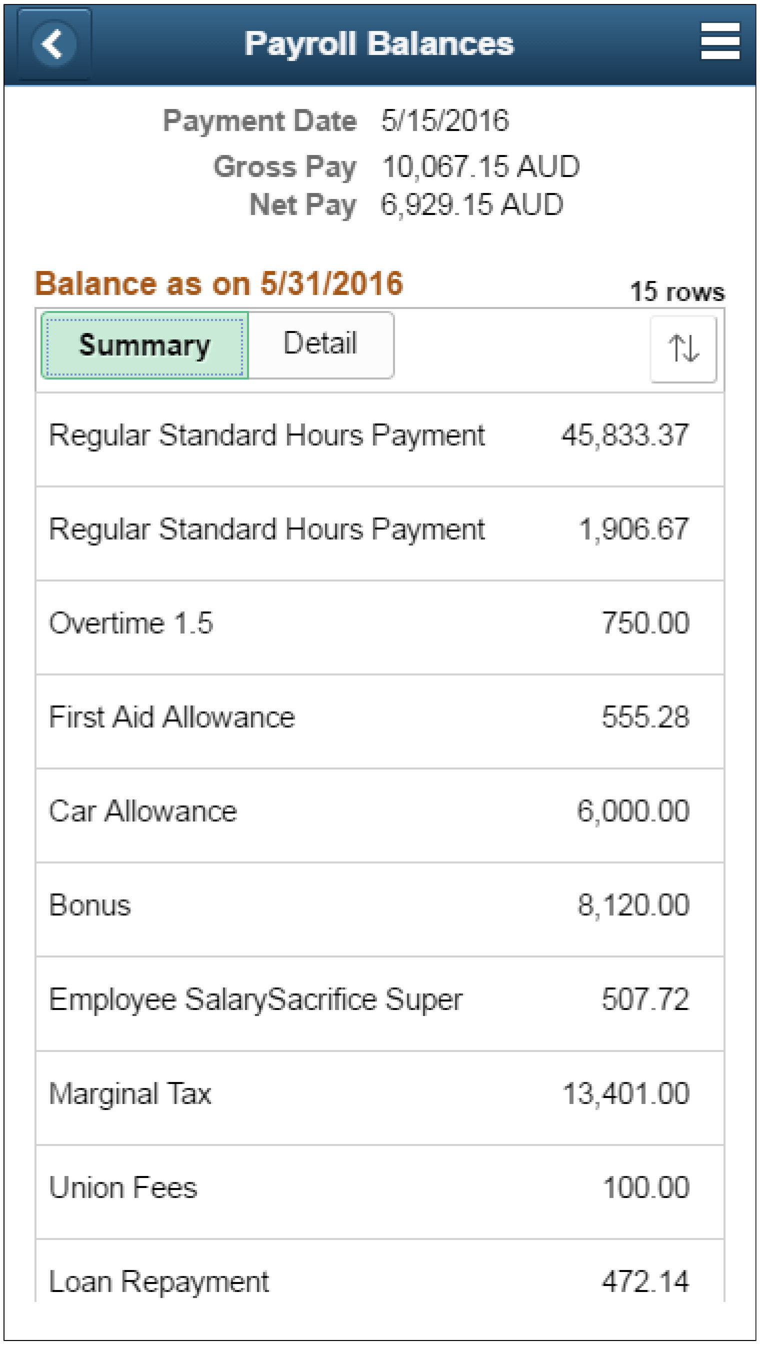
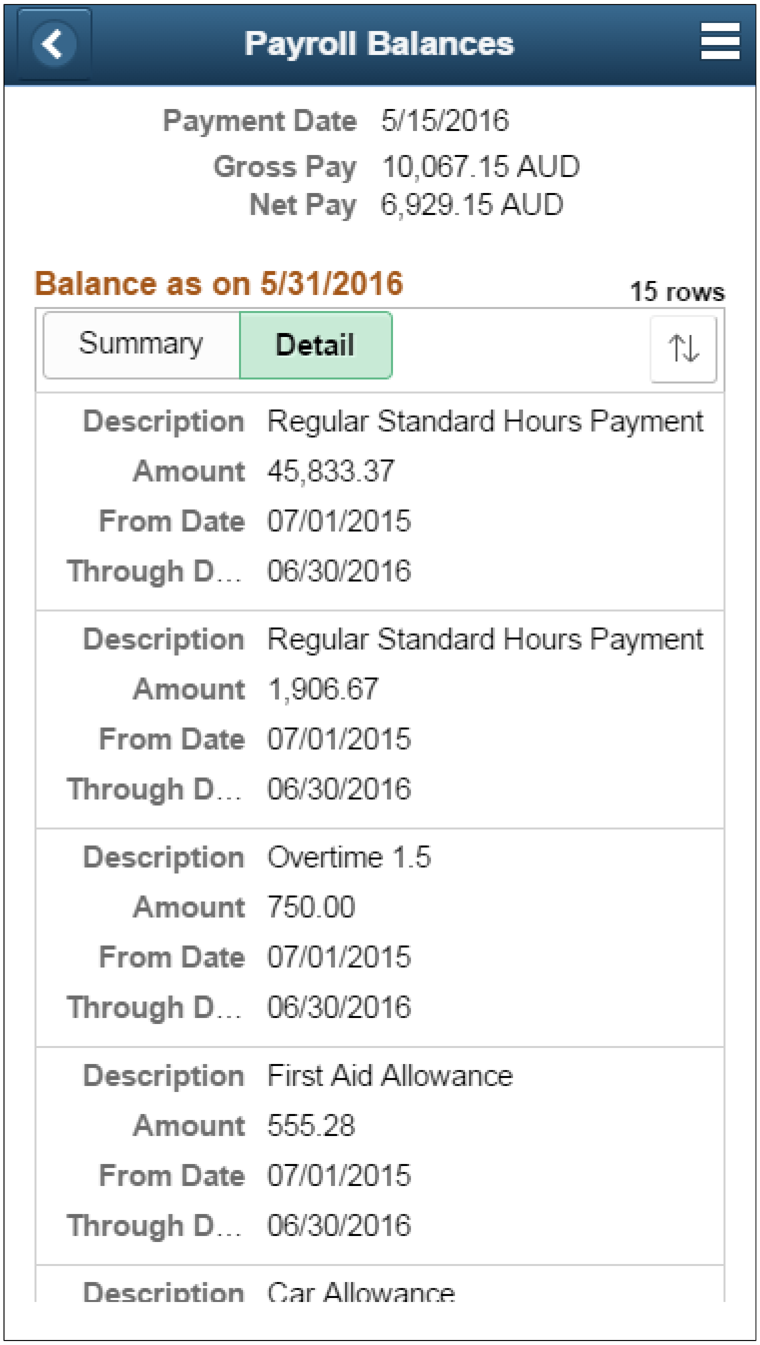


Image: Payroll Balances page: Detail tab

This example illustrates the Payroll Balances page: Detail tab for the smartphone.



Summary

This tab displays a summary of payroll balances as of the end date of the payslip period. The summary includes:

- Description
- Amount

Detail

This tab displays detailed information for payroll balances as of the end date of the payslip period. The detailed information includes:

- Description
- Amount
- From Date
- To Date

Balances Page

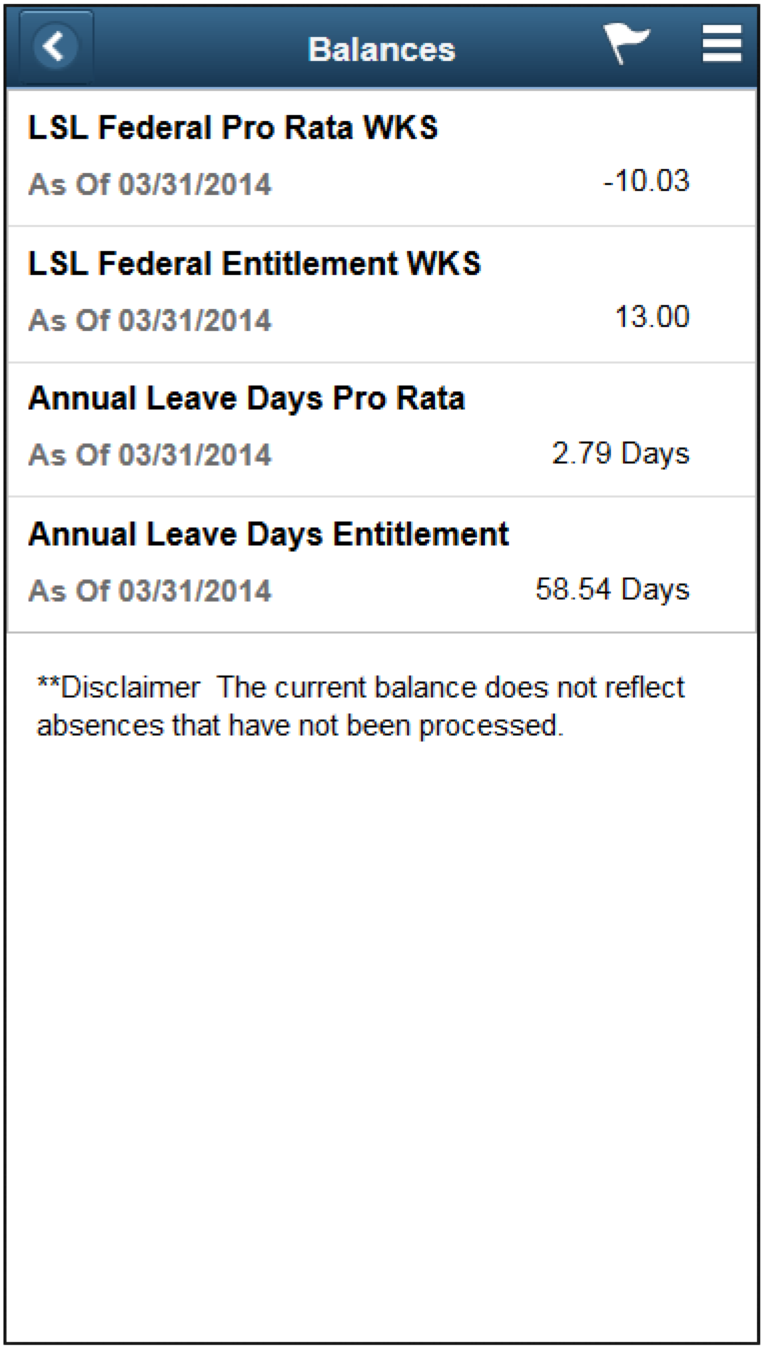
Use the Balances page (HGA_SS_BAL_FLU) to view absence balances for a payslip.

Navigation

Click the Absence Balances item on the Payment Summary page.

Image: Balances page

This example illustrates the Balances page for the smartphone.



This page displays the absence balances for a payee as of the end date of the payslip period. The balances reflect the most current absence that has been processed and finalized.

Payslip Analytics Page

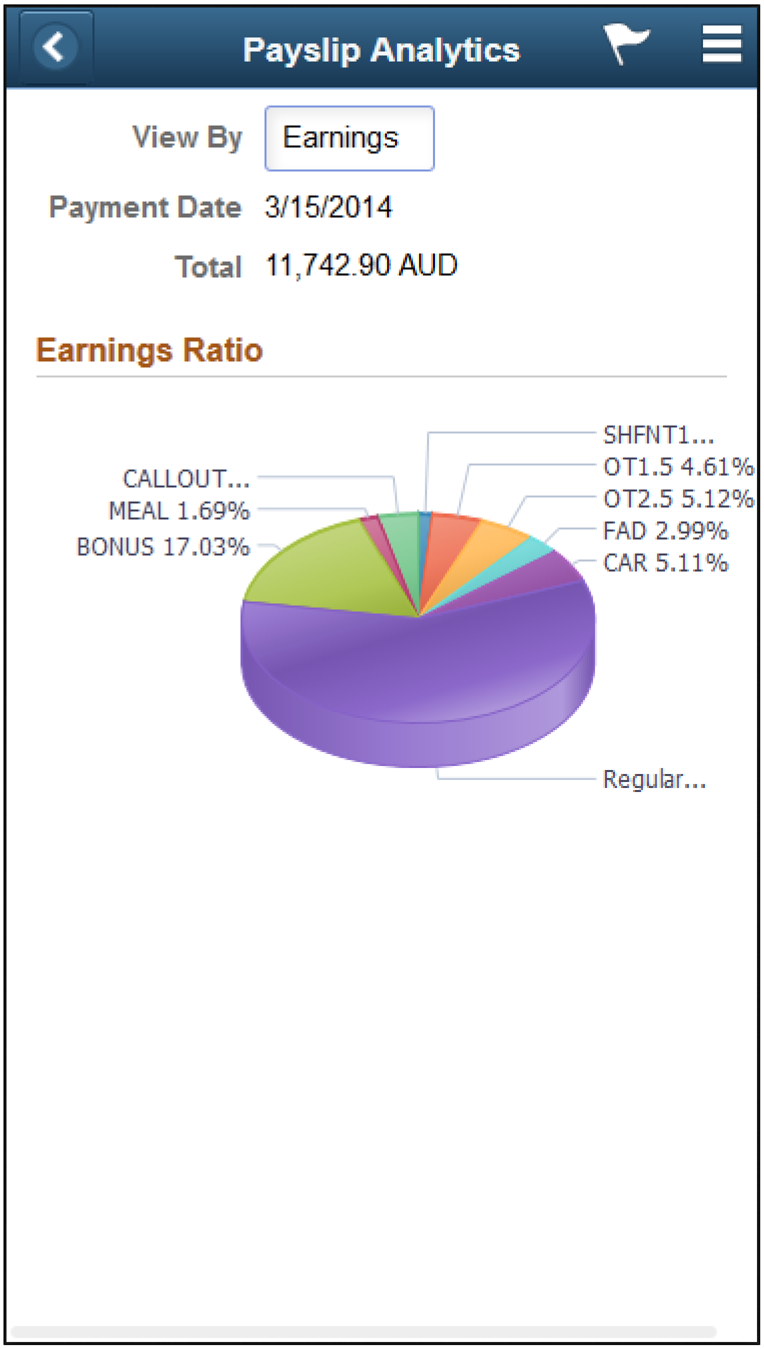
Use the Payslip Analytics page (GP_MPSLP_CHRT) to view how the ratios of the earnings and deductions associated with a payslip.

Navigation

Click the Payslip Analytics item on the Payment Summary page.

Image: Payslip Analytics page

This example illustrates the Payslip Analytics page for the smartphone.



View By	Select whether you want to see the ratios for earnings or deductions: • *Earnings:* Select to view the distribution of gross pay among all the earnings associated with a payslip.

- *Deductions:* Select to view the distribution of deductions associated with a payslip.

Payment Date Displays the payment date for the payslip.

Total Displays the total amount of earnings or deductions depending on the value you select in the View By field.

Using the PeopleSoft Fluid User Interface for Self Service Banking

This topic discusses how to review, edit, and add bank account and payment distribution information using the PeopleSoft Fluid User Interface.

Fluid Self Service for ePay Global Payroll Banking

Related Links

"Defining Payee Net Pay Elections" (PeopleSoft HCM 9.2: Global Payroll)

Pages Used for Self Service Banking

Page Name	***Definition Name***	***Usage***
Banking Tile	HC_GPSC_SSB_BNKACC_FL	Access the Banking page.
Banking Page	GPSC_BANK_ADD_FL	Review your bank account and payment distribution information.
Bank Accounts Page	GPSC_BANK_ACC_FL	Edit or add a bank account.
Payment Distribution Page	GPSC_NET_DIST_FL	Edit or add a payment distribution.

Banking Tile

Use the Banking tile (HC_GPSC_SSB_BNKACC_FL) to access the Banking page.

Navigation

The Banking tile is delivered as part of the Employee Self Service home page, but the location can change if you change the delivered home pages or if administrators personalize their home pages.

Image: Banking tile

This example illustrates the Banking tile.

Banking Page

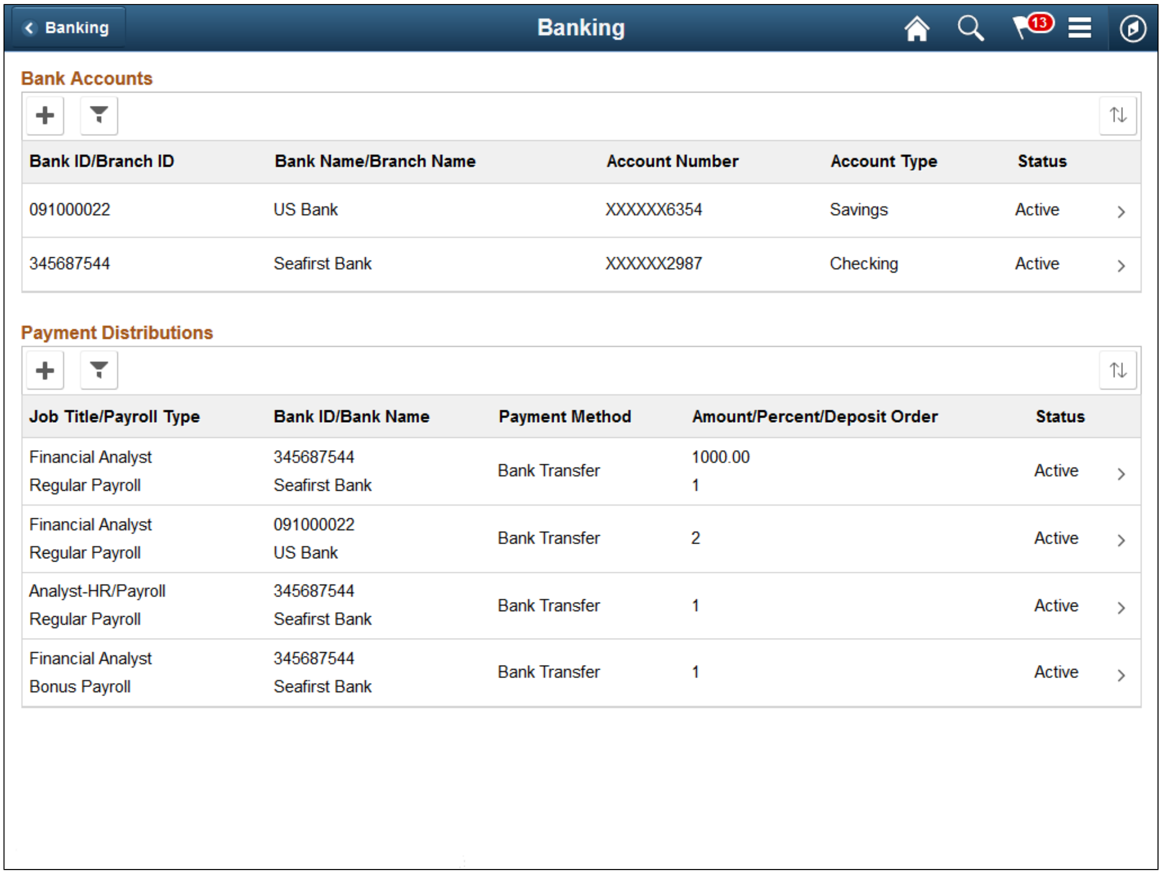
Use the Banking page (GPSC_BANK_ADD_FL) to review your bank account and payment distribution information.

Navigation

Click the Banking tile on the Employee Self Service home page.

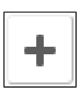
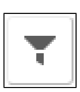
Image: Banking page

This example illustrates the fields and controls on the Banking page.



This page displays your bank accounts and payment distributions. To edit bank account information, click a bank account to access the Bank Accounts Page. To edit payment distribution information, click a payment distribution to access the Payment Distribution Page.

Note: The Payment Distributions grid is available only for employees processed using PeopleSoft Global Payroll.

 (Add)	Click to add a new bank account or payment distribution using the Bank Accounts Page or Payment Distribution Page, respectively.
 (Filter)	Click to access the Filter page and select criteria to narrow the list of bank accounts or payment distributions. You can filter bank accounts by Status and Account Type, and payment distributions by Status.

Bank Accounts Page

Use the Banking page (GPSC_BANK_ACC_FL) to edit or add a bank account.

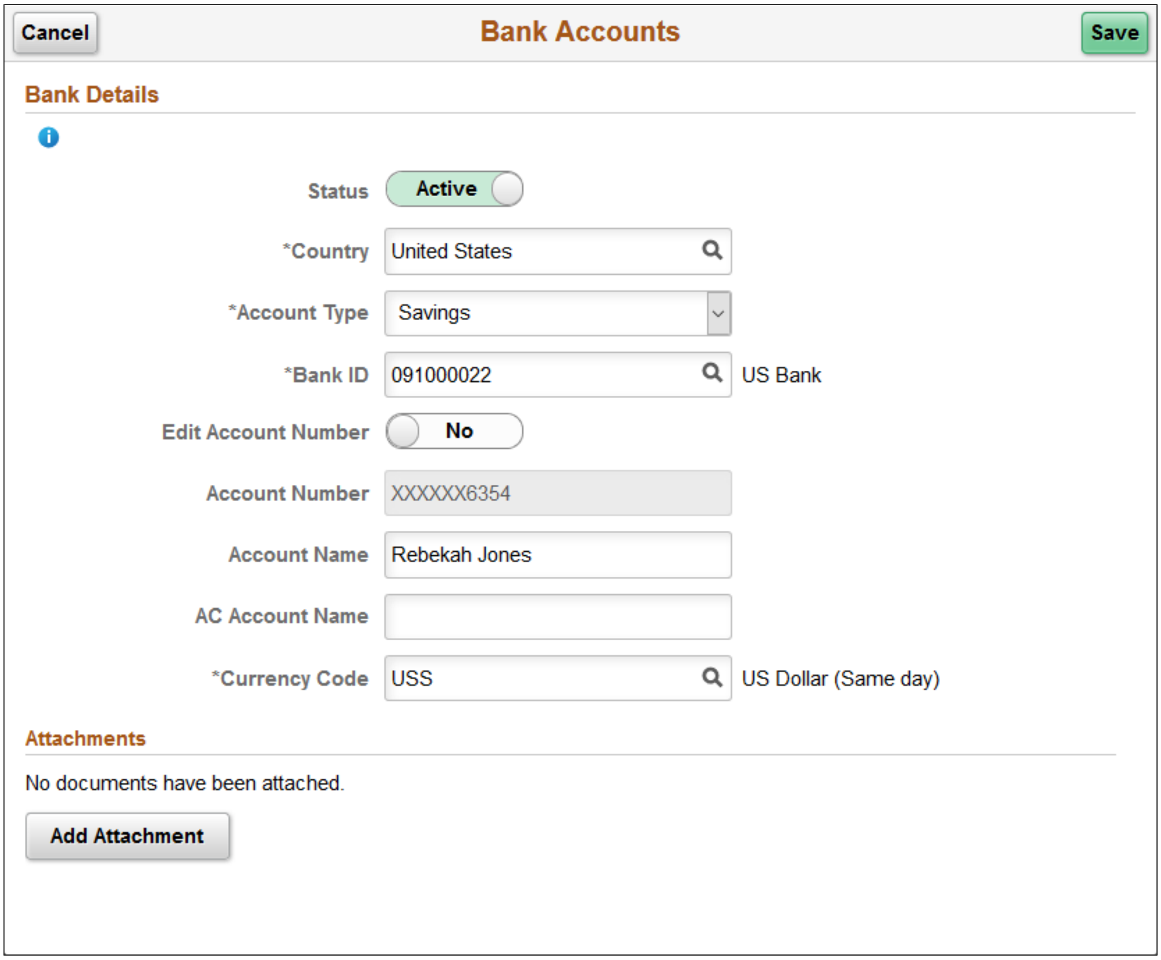
Navigation

Click a bank account on the Banking page.

Click the Add button on the Banking page to add a new bank account.

Image: Bank Accounts page

This example illustrates the fields and controls on the Bank Accounts page.



Note: The fields that appear on this page vary according to your banking setup and the country you select for the account.

Bank Details

Status	Select whether the bank account is *Active* or *Inactive*.
Country	Select the country for the payee's bank account. The countries available for you to select are defined on the Self Service Banking Options Page.
Account Type	Select the bank account type for the payee. The types available for you to select are defined on the Self Service Banking Options Page.

Bank ID Enter the ID of the bank associated with the account.

Account Number and **Retype Account Number** Enter the account number. Depending on the security setup on the Self Service Banking Options Page, you may need to retype the account number in the Retype Account Number field to confirm that you've entered it consistently and correctly.

Note: If masking is enabled for the country, saved account numbers appear in this field with most of the digits replaced by the letter X.

CLABE (MEX) Enter the Clave Bancaria Estandarizada (CLABE) number. This field is available only if you select *Mexico* in the Country field.

CBU (ARG) Enter the La Clave Bancaria Uniforme (CBU) number. This field is available only if you select *Argentina* in the Country field.

Description 1 and **Description 2** (NLD) Enter any additional payment information to include in your payment file. For example, if you use this bank account for mortgage payments, you could use these fields to enter a mortgage reference number.

Buliding Society ID, Roll Name, and **Roll Number** (GBR) Enter the ID, name, and number associated with the employee's building society account. These fields are available only if you select *United Kingdom* in the Country field, and *Building Society Roll Number* in the Account Type field.

Account Name Enter the account name for the person.

AC Account Name (alternate character account name) Enter an account name using alternate characters.

Currency Code Select the code of the currency in which the account is maintained.

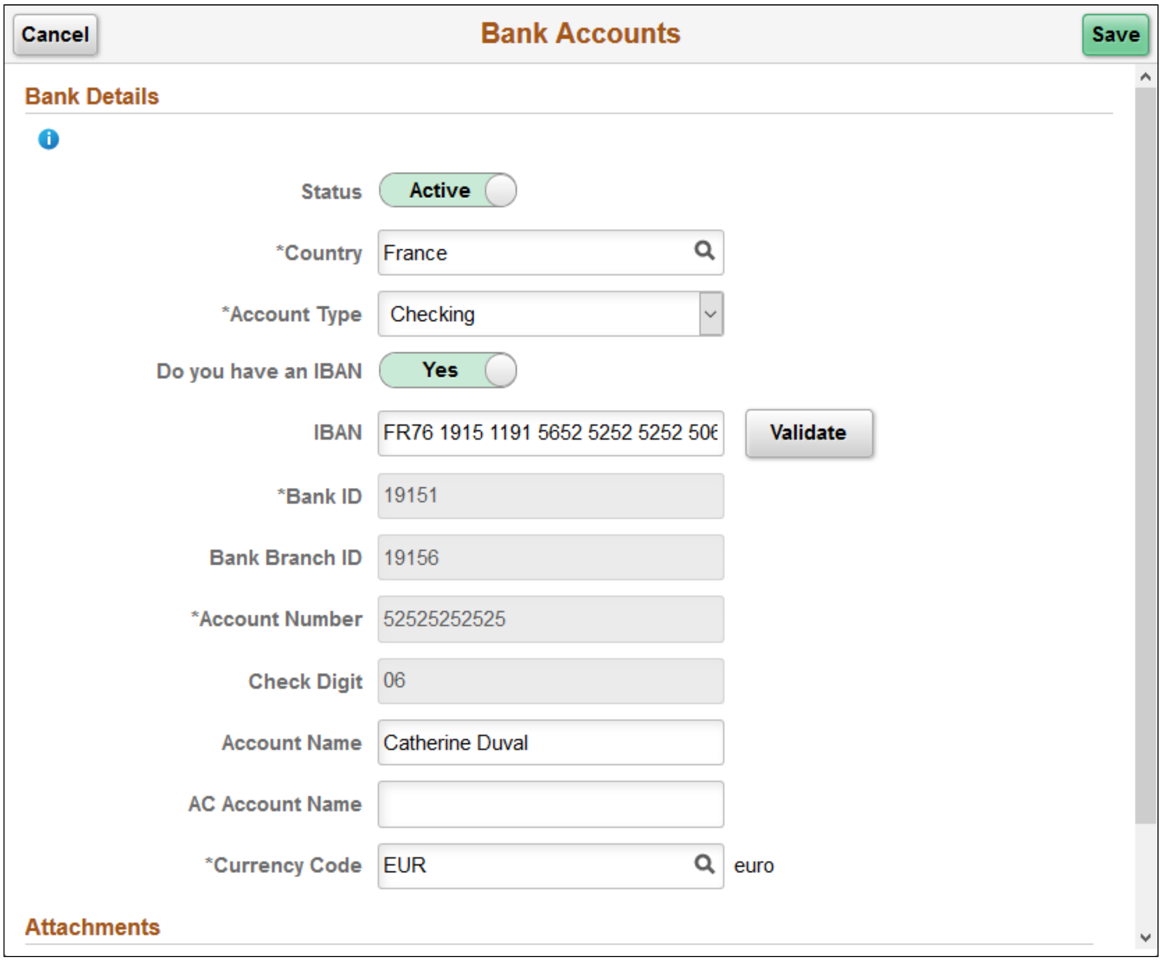
Already have an IBAN Number Switch to *Yes* to indicate that the payee has an (International Bank Account Number) IBAN. When you select *Yes*, the Bank ID and Account Number fields become display-only and the IBAN field and Validate button become available.

An IBAN is an account number that uniquely identifies a bank account and is assigned according to ISO standards so that it can be used across national borders. It is typically used for employees who reside in countries that are part of the European Union.

Note: When the Already have an IBAN Number check box is selected, the Bank ID, Bank Branch ID, Account Number, and Check Digit fields are not editable. The system populates them based on the entered IBAN when you click the Validate button.

Image: Example of the Bank Account page for an employee with an IBAN

This is an example of the Bank Accounts page for an employee with an IBAN.



IBAN (International Bank Account Number)	Enter the IBAN for the payee.
Validate	Click to validate the number entered in the IBAN field. The validation process alerts you if there is an error in the entered IBAN. In addition, the validation process populates the Bank ID, Bank Branch ID, Account Number, and Check Digit fields based on the entered IBAN.

Attachments

Add Attachment	Click to add an attachment to your bank account.

Related Links

"Maintain Bank Accounts Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

Payment Distribution Page

Use the Banking page (GPSC_NET_DIST_FL) to edit or add a payment distribution.

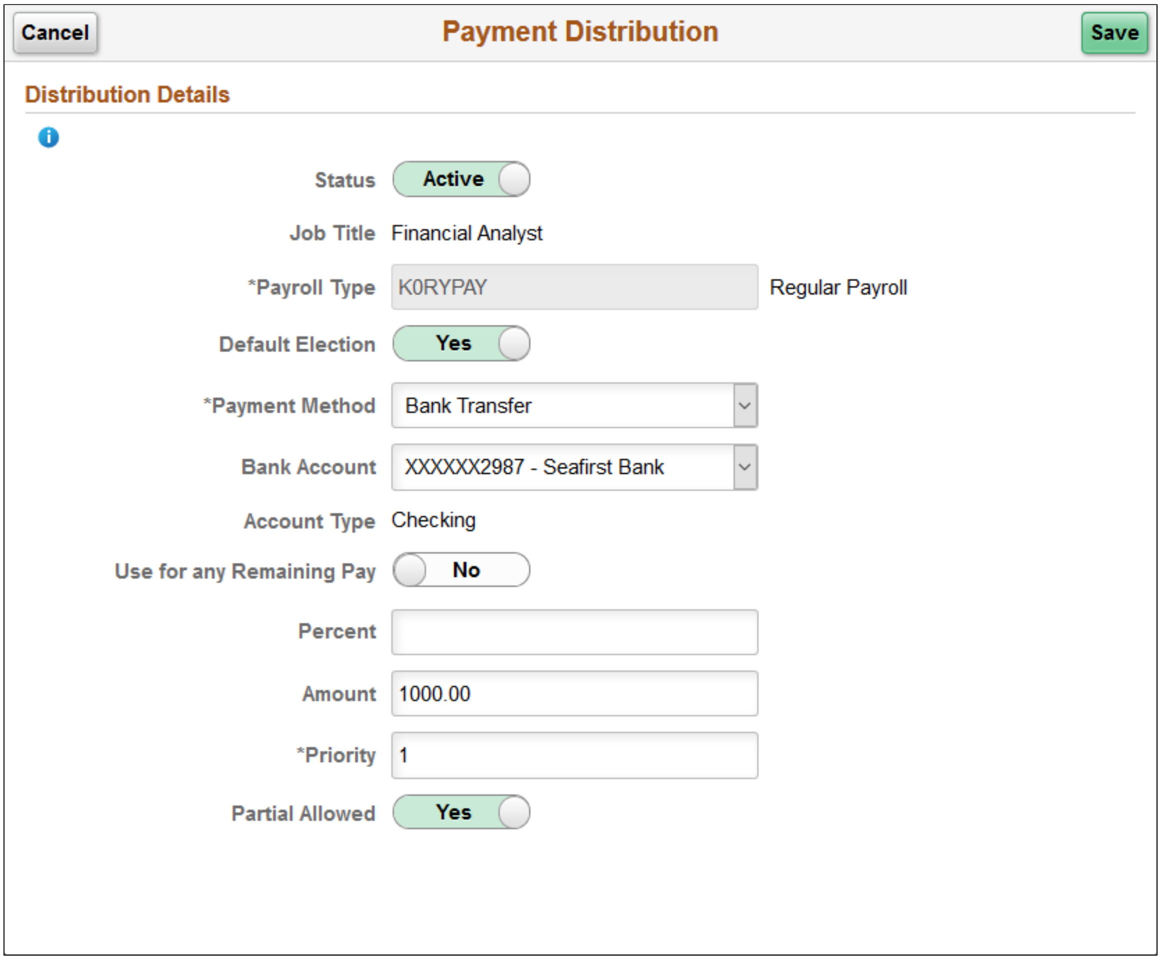
Navigation

Click a payment distribution on the Banking page.

Click the Add button on the Banking page to add a new payment distribution.

Image: Payment Distribution page

This example illustrates the fields and controls on the Payment Distribution page.



Status

Select whether the distribution is *Active* or *Inactive*.

Job Title

Select the job title to which this payment distribution applies.

Payroll Type

Select the run type for the payment distribution.

Default Election

Switch to *Yes* to indicate the default run type. When the banking process runs, the system checks the run type defined on the pay calendar and seeks a match on the net distribution for the payee. If it finds none, it uses the distribution designated as the default election.

Payment Method

Select the payment method for your distribution. The methods available for you to select are defined on the Self Service Banking Options Page.

Bank Account

For *Bank Transfer* and *Wire Transfer* payment methods, select the account you want to use.

Use for any Remaining Pay

Switch to Yes to make this the primary account. If you set up distribution amounts for allocation to several accounts and an amount remains after allocation, the extra amount goes to the primary account.

Percent

If the distribution is calculated by a percentage of the net payment, enter that percentage.

Amount

If the distribution to an account is calculated by an amount, specify that amount.

Note: You can define a distribution in percentages, amounts, or both. The total cannot exceed 100 percent. Any amount remaining after percentage allocation is allocated to the primary account, unless otherwise specified.

Priority

Enter a number to prioritize a distribution. For example, if you want 100 distributed to a savings account every month and everything else distributed to a checking account, you would give the savings account higher priority.

Partial Allowed

Select to allow partial amounts to be distributed.

For example, let's say you distribute 1200 monthly as follows:

- 500: checking account.
- 400: savings account.
- 300: retirement account.

One month, your pay is only 1050. The system still distributes 500 to the checking account and 400 to the savings account, but it cannot distribute the full 300 to the retirement account. If Partial Allowed is selected, the system distributes the partial amount, which is 150 in this case. If Partial Allowed isn't selected, the system allocates 150 your primary account and nothing is deposited in the retirement account.

Related Links

"Specify Net Pay Elections Page" (PeopleSoft HCM 9.2: Global Payroll)

Chapter 5

(JPN) Updating Year-End Adjustment Data

(JPN) Understanding the YEA Data Self-Service Transaction

This topic discusses:

- YEA data self-service transaction.
- Status codes.

(JPN) YEA Data Self-Service Transaction

The YEA data self-service transaction provides updated data for the YEA calculations in Global Payroll for Japan. Employees can update YEA data including:

- Their personal information such as name and address (available if PeopleSoft eProfile is licensed).
- Their own and dependents' tax data.
- Deduction data such as insurance deduction, spouse special deduction, dependent deductions, and special deduction for housing loan.

Note: Employees who are eligible for dependent deduction from secondary salaries cannot use the YEA data self-service transaction to enter their own tax data or dependent tax data.

Payroll administrators and employees perform the following tasks in this business process:

1. The payroll administrator specifies the time period during which employees can review and update data through the YEA data self-service transaction.

   The payroll administrator also specifies the date on which tax data and deduction data take effect.

2. Employees review and update their data on the YEA data self-service transaction pages.

   Employees must review all data before they can successfully submit data.

3. The payroll administrator reviews the employee's YEA data.

   Administrators can reject an employee's deduction data and request revision.

   Approval of each employee's deduction data before loading is an optional feature.

4. The payroll administrator loads updated deduction data including life and other insurance, spouse, dependent and housing loan deduction information to a Global Payroll for Japan table, where it is available for further review and processing.

For more information, see the product documentation for PeopleSoft Global Payroll for Japan

Status Codes

The system assigns a status to each employee's YEA data to enforce employees' complete review and to facilitate the administrator's review, optional approval, and data load to payroll. The system displays status codes on the YEA Information page that employees access. Payroll administrators can edit the status codes on the Review/Approve Self Service Data JPN page. The status codes *Submitted* and *Approved* are available as run control parameters when loading the data.

Following is a list of the status codes:

Open

The employee has not reviewed the data. This is the default status for each data section when the employee first accesses the YEA Information page.

Reviewed

The employee has accessed the data page and either selected the Save button for updates or the Return to YEA Information link if data was unchanged. Employees can still access and update pages that have a reviewed status.

Submitted

The employee has successfully submitted deduction data. The employee cannot change deduction data once this status is assigned. This status is available as a run control parameter when loading data to records.

Approved

The payroll administrator sets this status on the Review/Approve Self Service Data JPN page if the organization requires approval of deduction data before loading. The employee cannot update the page once this status is assigned. This status is available as a run control parameter when loading data to records.

Rejected

The payroll administrator sets this status on the Review/Approve Self Service Data JPN page if the employee is required to again review some of the deduction data. The administrator must notify the employee separately to change the data. The system changes the status of all data back to reviewed if one section has the rejected status, so that the employee can review all data again.

Sent to Payroll

The system sets this status after the payroll administrator runs the Load YEA Self Service Application Engine process (GPJP_YEASSLD) to load the deduction data into the corresponding records. The employee cannot access the update page once this status is assigned.

(JPN) Setting Up the YEA Data Self-Service Transaction

To set up the YEA data self-service transaction, use the YEA Self Service Setup JPN (GPJP_YEA_SETUP_GBL) component.

Page Used to Set Up the YEA Data Self-Service Transaction

Page Name	***Definition Name***	***Usage***
Year End Adjustment Self Service Setup Page	GPJP_YEA_SETUP	Specify the period during which the YEA data self-service transaction is available to employees and specify the effective date of tax and deduction data entered through the transaction.

Year End Adjustment Self Service Setup Page

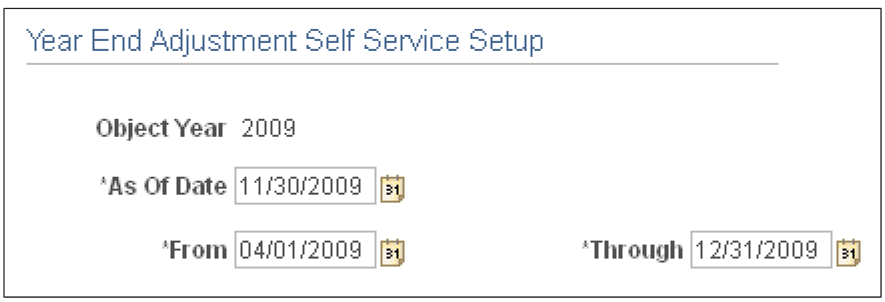
Use the Year End Adjustment Self Service Setup page (GPJP_YEA_SETUP) to specify the period during which the YEA data self-service transaction is available to employees and specify the effective date of tax and deduction data entered through the transaction.

Navigation

Set Up HCM > Common Definitions > Self Service > YEA Self Service Setup JPN > Year End Adjustment Self Service Setup

Image: Year End Adjustment Self Service Setup page

This example illustrates the fields and controls on the Year End Adjustment Self Service Setup page.



Object Year	The year that is being adjusted.
As Of Date	The system uses this date when retrieving current information from effective-dated tables. The system also uses this date as the effective date when loading YEA self-service data into tables.
From and **Through**	Enter the begin and end dates of the period that employees can access the YEA data self-service transaction.

(JPN) Reviewing and Updating YEA Data

Pages Used to Review and Update YEA Data

Page Name	***Definition Name***	***Usage***
YEA Information Page	GPJP_YEA_SSERVICE	Employees access individual transactions to review and update YEA data.
Employee Tax Information Page	GPJP_YEA_EETAX	Employees review and update tax information such as relationship to head of household and disability information.
Personal Information Page	HR_EE_PERS_INFO	Employees review and update name, address, and other personal data information. This page is not available if you do not license eProfile. The Employee Personal Information link is available only if the organization also licenses eProfile.
Dependent Tax Information Page	GPJP_YEA_DEPTAX	Employees review dependent relationship, type, and disability type information. They also access a page for editing dependent information.
Edit Dependent Tax Information Page	GPJP_YEA_DEPTX_2	Employees edit dependent information. They cannot add or delete a dependent on this page.
Life Insurance Page	GPJP_YEA_LIFE	Employees review and update life insurance and personal pension insurance information.
Other Insurance Page	GPJP_YEA_NONLIFE	Employees review and update nonlife insurance information, including social insurance and small mutual aid.
Spouse Special Deduction Page	GPJP_YEA_SPOUSE	Employees review and update spouse special deduction data.
Special Deduction for Housing Loan Page	GPJP_YEA_HOUSE	Employees review and update information relative to the special deduction for housing loan.

Understanding How to Review and Update YEA Data

Through the YEA Information page, employees access other pages to review and update YEA information. Current data is displayed on each page when first accessed. Employees select the links to access the corresponding pages, where they can view and modify existing data. The current status of the data in the section is displayed to the right of each link. Employees can access the corresponding page only if the status is *Open*, *Reviewed,* or *Rejected.*

Employees must review every page that is accessible from the main page before they can successfully submit their data. The system presents an error message if the employee tries to submit when there is still a status of open or rejected. To set a section's status to reviewed, employees select the Save button if they have updated data or the Return to YEA information link if they have only reviewed the data.

Related Links

(JPN) Understanding the YEA Data Self-Service Transaction

(JPN) Reviewing, Approving, and Loading YEA Self-Service Data

Pages Used to Review, Approve, and Load Employee YEA Data

Page Name	***Definition Name***	***Usage***
Review/Approve Self Service Data JPN Page	GPJP_YEA_PAYADM	Payroll administrators view a summary and details of employee YEA data, edit status, and approve if required. Administrators cannot edit employee data.
Load YEA Self Service Data JPN Load YEA Self Service Data JPN Page	GPJP_RC_YEALOAD_SS	Run the Load YEA Self Service process to load updated self-service employee personal data, dependent deduction data, life and nonlife insurance, and spouse and housing loan deduction information into the Global Payroll for Japan YEA table and the corresponding page (GPJP_YEA_PYEADJ).
Payee List Page	GPJP_RC_YEA_SEC	Select individual employees to load their data.

Review/Approve Self Service Data JPN Page

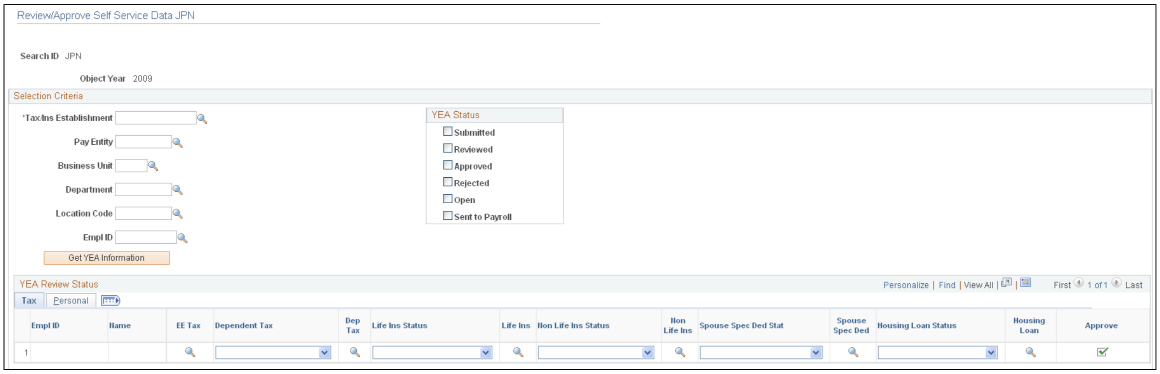
Payroll administrators use the Review/Approve Self Service Data JPN page (GPJP_YEA_PAYADM) to view a summary and details of employee YEA data, edit status, and approve if required. Administrators cannot edit employee data.

Navigation

Global Payroll & Absence Mgmt > Year-End Processing > Rvw/Appr Self Service Data JPN > Review/ Approve Self Service Data JPN

Image: Review/Approve Self Service Data JPN page

This example illustrates the fields and controls on the Review/Approve Self Service Data JPN page.



Selection Criteria

Use the fields in this group box to define the group of employees to display in the YEA Review Status group box. Use the optional Pay Entity, Business Unit, Department, Location Code, and EmplID fields to restrict the list as desired.

YEA Status (year-end adjustment status)
Select status codes; the system displays employees whose status codes match the selections.

Get YEA Information (get year-end adjustment information)
Select to load the data that matches the parameters that you defined in the YEA Status group box.

YEA Review Status - Tax Tab

This grid displays the current status of each employee's YEA data. To view details of the employee's data, select the corresponding button, which takes you to the self-service page on which the employee entered data. Administrators cannot edit employee data on the self-service pages.

You can reject dependent deductions, employee life insurance, nonlife insurance, spouse special deduction, or housing loan special deduction data by changing the status for that data to *Rejected.* If you reject any employee data, notify the employee to correct and resubmit it.

Note: The system changes the status of all data back to *Reviewed* if one section has the *Rejected* status, so that the employee can review all data again. When this happens, the following message appears: "If you change the Status to *Rejected,* all other nonrejected status codes change to *Reviewed.*"

Approve
Approval is optional. Select this button for each employee if the organization requires approval before loading the data. The status of all data for the employee becomes *Approved.*

YEA Review Status - Personal Tab

Select the Personal tab to view the employee's home and mailing address, phone, or birthday information.

Related Links

(JPN) Understanding the YEA Data Self-Service Transaction

Load YEA Self Service Data JPN Page

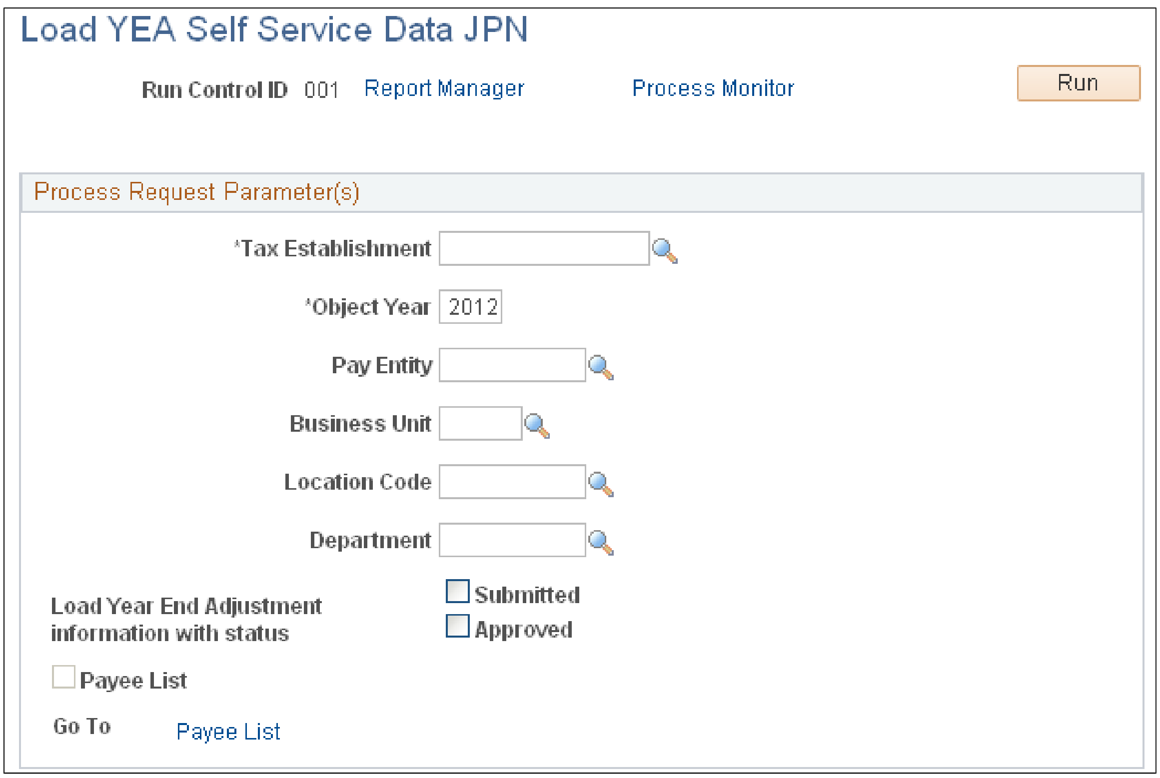
Use the Load YEA Self Service Data JPN page (GPJP_RC_YEALOAD_SS) to run the load YEA Self Service process to load updated self-service employee personal data, dependent deduction data, life and nonlife insurance, and spouse and housing loan deduction information into the Global Payroll for Japan YEA table and the corresponding page (GPJP_YEA_PYEADJ).

Navigation

Global Payroll & Absence Mgmt > Year-End Processing > Load YEA Self Service Data JPN > Load YEA Self Service Data JPN

Image: Load YEA Self Service Data JPN page

This example illustrates the fields and controls on the Load YEA Self Service Data JPN page.



Process Request Parameter(s)

Use the optional Pay Entity, Business Unit, Location Code, and Department fields to restrict the load to a group of employees as desired. You can use the fields on the Payee List page to identify individual employees.

Business Unit	This is a required field if you select a location code or department.

Submitted and **Approved**	Records that meet the other criteria (including the criteria that you indicate on the Payee List page) and that have the selected status are loaded. You can select both check boxes.
Payee List	Select to access the Payee List page, where you can select any number of individual employees for the process run. When you return to the Load YEA Self Service page, this check box is selected.

Related Links

"Entering Deduction Data for the Year-End Adjustment (YEA)" (PeopleSoft HCM 9.2: Global Payroll for Japan)

Appendix A

Delivered Workflows for ePay

Delivered Workflows for ePay

This topic discusses ePay workflows. The workflows are listed by workflow name.

About ePay Year-End Email Notifications

The following applies to year-end email notifications sent by ePay workflow.

Language Used

Year-end email notifications use the preferred language specified for the employee in the Personal Data component. If no preferred language is specified, or it is specified but not available, the system uses the default language of English, except for (CAN) forms RL-1 and RL-2. The default language used for (CAN) forms RL-1 and RL-2 is Canadian French.

If the recipient's preferred language is not English, the process searches for year-end notification text in the corresponding language. If no entries are found for that language in the Related Language database, the system displays a message to advise the payroll administrator that no year-end text entries exist in the employee's preferred language and the recipient will be notified in the default language.

Email Addresses Requirements

Most year-end notification processes require that employees have valid email addresses in the system. Each time the process encounters an employee that does not have a valid email address, the process stops and displays messages for the administrator to follow to resolve the issue and restart the process.

To send an email notification, the process looks for the employee's preferred email address. If a preferred email address is not found, the system processes the year-end transaction, displays a message in the log file regarding the employee's lack of a preferred email address, and continues to the next employee. The process does not stop due to the absence of a preferred email address, but it also does not generate or send an email notification to any employee who does not have a preferred email address in the system.

Note: When you restart a year-end notification process, employees who have already been sent an email notification will not be notified a second time. The process attempts to generate and send notifications only to employees who have not yet been notified.

Because of these requirements, when an employee enters or updates information on the Year-End Consent page, the system checks for invalid email addresses and the selection of a preferred email address. If the employee has an invalid email address, the system displays a message informing them that their consent status cannot be updated until a valid email address exists. If the employee has no preferred email address, the system displays a message informing them that because no preferred email address exists, their consent status will be processed, but they will not receive an email confirmation notice. In both cases, the messages encourage employees to contact their employer to provide the needed information.

W-2 Reissue Request

This topic discusses the W-2 reissue request workflow.

Description

- *Event Description:* Employees use the W-2 Reissue Request page to request a new W-2 be sent to their home or work location.
- *Action Description:* When the page is submitted, a workflow worklist item is routed to the Payroll Administrator to indicate that this request for a duplicate W–2 has been generated.
- *Notification Method:* Worklist

Workflow Objects

This table lists and describes the W-2 reissue request workflow objects:

Information Type	***Description***
Event	PY_IC_W2
Workflow Action	Manual
Role	Payroll Administrator
Email Template	W2 Request Worklist
Business Process	SELF_SERVICE_PAYROLL
Business Activity	W2Request
Business Event	Save W2

W-4 Tax Information

This topic discusses the W-4 tax information workflow.

Description

- *Event Description:* An employee uses ePay to change W-4 information.
- *Action Description:* An email notification is sent to the employee upon completion that verifies the W-4 details.
- *Notification Method:* Email

Workflow Objects

Information Type	***Description***
Event	PY_IC_W4
Workflow Action	Manual
Role	Roleuser by Oprid Qry
Email Template	Send E-mail to employee
Business Process	SELF_SERVICE_PAYROLL
Business Activity	ReviewChangeFederalW4Info
Business Event	Save changes

Year-End Form Availability Notification

This topic discusses the year-end form available workflow.

Description

- *Event Description:* Payroll administrator notifies employees that year-end forms (W-2, T4, T4A, RL-1, or RL-2) are available for viewing in self service.
- *Action Description:* When the payroll administrator selects the Availability Notification button on the Year End Form Options page, an email notification is sent to each consenting employee notifying them that forms are available for viewing and printing.
- *Notification Method:* Email

Workflow Objects

This table lists and describes the year-end form available workflow objects:

Information Type	***Description***
Event	(USA) PY_YE_SEND_NOTE_USA (CAN) PY_YE_SEND_NOTE_CAN (CAN) PY_YE_SND_NOTE_MRQ
Workflow Action	Manual
Role	Payroll administrator
Email Template	Send E-mail to employee, text type *Form Available.*

Information Type	Description
Business Process	Manage Annual Tax Rptg U.S. and Manage Annual Tax Rptg Can
Business Activity	(USA) Send W-2 Notification (CAN) Send T4 or T4A Notification (CAN) Send RL-1 or RL-2 Notification
Business Event	Notify Employee

Year-End Form Consent Confirmation

This topic discusses the year-end form consent confirmation workflow.

Description

- *Event Description:* An employee uses ePay to grant consent to receive year-end forms (W-2, W-2c, T4, T4A, RL-1, or RL-2) electronically in self service.
- *Action Description:* Upon confirmation of submittal of consent, an email notification is sent to the employee that confirms the consent.
- *Notification Method:* Email

Workflow Objects

This table lists and describes the year-end form consent confirmation workflow objects:

Information Type	Description
Event	(USA) PY_YE_SEND_NOTE_USA (CAN) PY_YE_SEND_NOTE_CAN (CAN) PY_YE_SND_NOTE_MRQ
Workflow Action	Automatic
Role	Roleuser by Oprid Qry
Email Template	Send E-mail to employee; text type Consent Confirmation
Business Process	NA
Business Activity	NA
Business Event	Notify Employee

Year-End Form Consent Withdrawn Confirmation

This topic discusses the year-end form consent withdrawn confirmation workflow.

Description

- *Event Description:* An employee uses ePay to withdraw consent to receive year-end forms (W-2, W-2c, T4, T4A, RL-1, or RL-2) electronically in self service.
- *Action Description:* Upon confirmation of withdrawal of consent, an email notification is sent to the employee that confirms the consent withdrawal.
- *Notification Method:* Email

Workflow Objects

This table lists and describes the year-end form consent withdrawn confirmation workflow objects:

Information Type	***Description***
Event	(USA) PY_YE_SEND_NOTE_USA (CAN) PY_YE_SEND_NOTE_CAN (CAN) PY_YE_SND_NOTE_MRQ
Workflow Action	Automatic
Role	Roleuser by Oprid Qry
Email Template	Send E-mail to employee; text type Withdrawn Confirmation
Business Process	NA
Business Activity	NA
Business Event	Notify Employee

Year-End Form Reset Consent Notification

This topic discusses the year-end form reset consent notification workflow.

Description

- *Event Description:* Payroll administrator performs a mass reset (to *No Consent Received* status) of specified employees' consent to receive year-end forms (W-2, W-2c, T4, T4A, RL-1, or RL-2) electronically in self service.
- *Action Description:* When the payroll administrator runs the Reset Form Consent Application Engine process, first a message appears confirming that consent status has been reset for all specified employees. When the administrator commits that, an email notification is sent to each processed employee confirming the reset of consent status.

- *Notification Method:* Email

Workflow Objects

This table lists and describes the year-end form consent reset workflow objects:

Information Type	***Description***
Event	(USA) PY_YE_SEND_NOTE_USA (CAN) PY_YE_SEND_NOTE_CAN (CAN) PY_YE_SND_NOTE_MRQ
Workflow Action	Automatic
Role	Payroll administrator
Email Template	Send E-mail to employee; text type Consent Reset Notification
Business Process	NA
Business Activity	NA
Business Event	Notify Employee

Year-End Form Correction Available

This topic discusses the year-end form correction available workflow.

Description

- *Event Description:* Payroll administrator notifies employees that corrected year-end forms (W-2, W-2c, T4, T4A, RL-1, or RL-2) are available for viewing in self service.
- *Action Description:* When the payroll administrator selects the Availability Notification button on the Year End Form Options page, an email notification is sent to the employee notifying that the form is available for viewing and printing.
- *Notification Method:* Email

Workflow Objects

This table lists and describes the year-end form correction available workflow:

Information Type	***Description***
Event	(USA) PY_YE_SEND_NOTE_USA (CAN) PY_YE_SEND_NOTE_CAN (CAN) PY_YE_SND_NOTE_MRQ

Information Type	***Description***
Workflow Action	Manual
Role	Payroll administrator
Email Template	Send E-mail to employee; text type Correction Available
Business Process	Manage Annual Tax Rptg U.S. and Manage Annual Tax Rptg Can
Business Activity	(USA) Send W-2 Notification (CAN) Send T4/T4A Notification (CAN) Send RL-1/RL-2 Notification
Business Event	Notify Employee