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PeopleSoft

PeopleSoft HCM 9.2: PeopleSoft ePay

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Documentation Accessibility

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Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit https://docs.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit https://docs.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Contents

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.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft 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. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the Oracle Software Delivery Cloud.

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, see Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. 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.
& (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.

Typographical Convention	*Description*
⇒	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

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

PeopleSoft HCM Related Links

Oracle Help Center

PeopleSoft Online Help Home

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

HCM Abbreviations

PeopleSoft Spotlight Series

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com.

Please include the applications update image or PeopleTools release that you’re 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 Withholding Certificate	W-4 Withholding Certificate	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

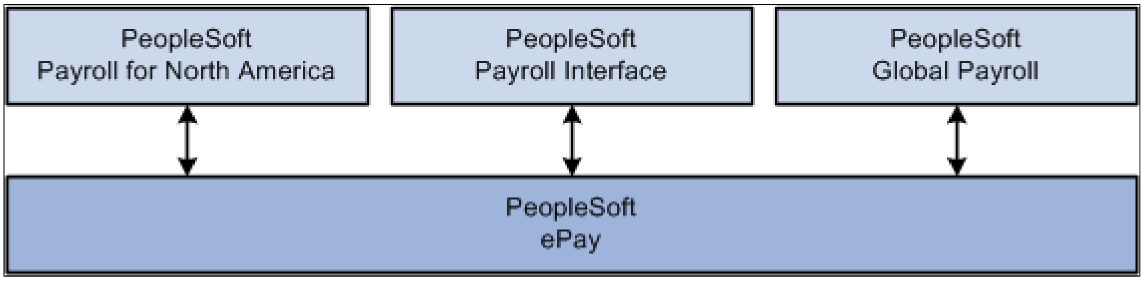
ePay provides, and we discuss, the following business processes in this product documentation:

- 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:

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

ePay self-service pages are accessible using one of these navigation methods:

- Search for pages by entering page names in the Global Search bar.
- Select the Banking Tile, Payroll Tile, and Payslips Tile from the Employee Self Service fluid home page.
- NavBar menu path: **Self Service** > **Payroll and Compensation**

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" (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 Withholding Certificate (PY_IC_W4_DATA_2020).

  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 Withholding Certificate 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 Withholding Certificate 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 as employees.

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.
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	Indicate whether you want a printed copy of the pay statement mailed to your home address. The default is set to yes.
(USA) W-4 Withholding Certificate Page	PY_IC_W4_DATA_2020	Complete and submit Form W-4 as an employee. 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 Withholding Certificate 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 Withholding Certificate self-service transaction, you must use a different authentication method.
Pay Inquiry Page	PI_IC_CHK_DATA	(For Payroll Interface users only) View paycheck information for any confirmed pay period.
(USA) W-2 Reissue Request Page	PY_IC_W2_DATA	Request to have a new W-2 form sent to your home or work address as an employee. 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.

Page Name	*Definition Name*	*Usage*
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.

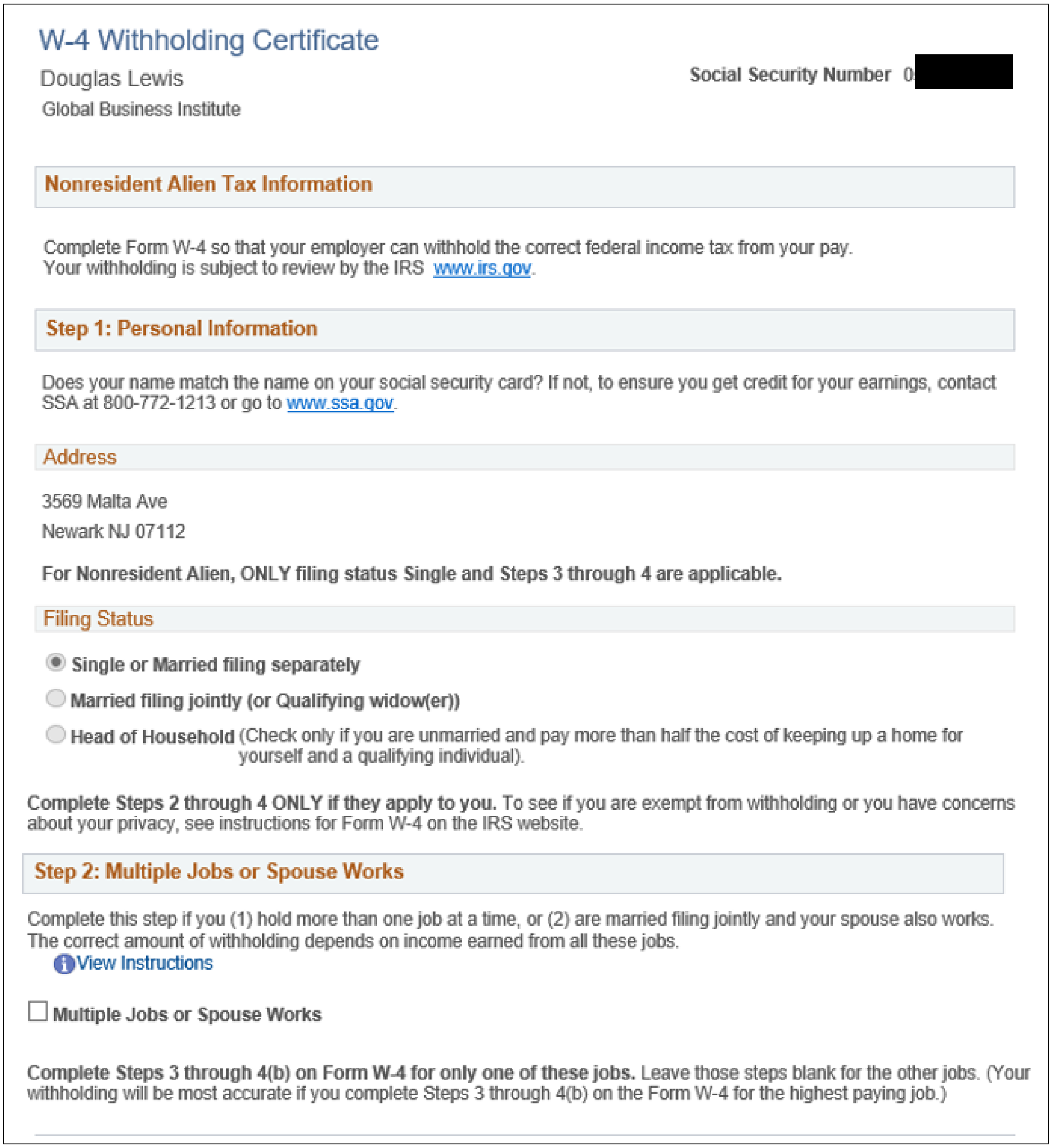
(USA) W-4 Withholding Certificate Page

Use the W-4 Withholding Certificate page (PY_IC_W4_DATA_2020) to complete and submit Form W-4 as an employee.

Navigation:

Self-Service > **Payroll and Compensation** > **W-4 Tax Information** > **W-4 Withholding Certificate**

This example illustrates the fields and controls on the W-4 Withholding Certificate page (1 of 2).



W-4 Withholding Certificate

Douglas Lewis

Global Business Institute

Social Security Number [redacted]

Nonresident Alien Tax Information

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

Step 1: Personal Information

Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.

Address

3569 Malta Ave

Newark NJ 07112

For Nonresident Alien, ONLY filing status Single and Steps 3 through 4 are applicable.

Filing Status

- (selected) **Single or Married filing separately**
- **Married filing jointly (or Qualifying widow(er))**
- **Head of Household** (Check only if you are unmarried and pay more than half the cost of keeping up a home for yourself and a qualifying individual).

Complete Steps 2 through 4 ONLY if they apply to you. To see if you are exempt from withholding or you have concerns about your privacy, see instructions for Form W-4 on the IRS website.

Step 2: Multiple Jobs or Spouse Works

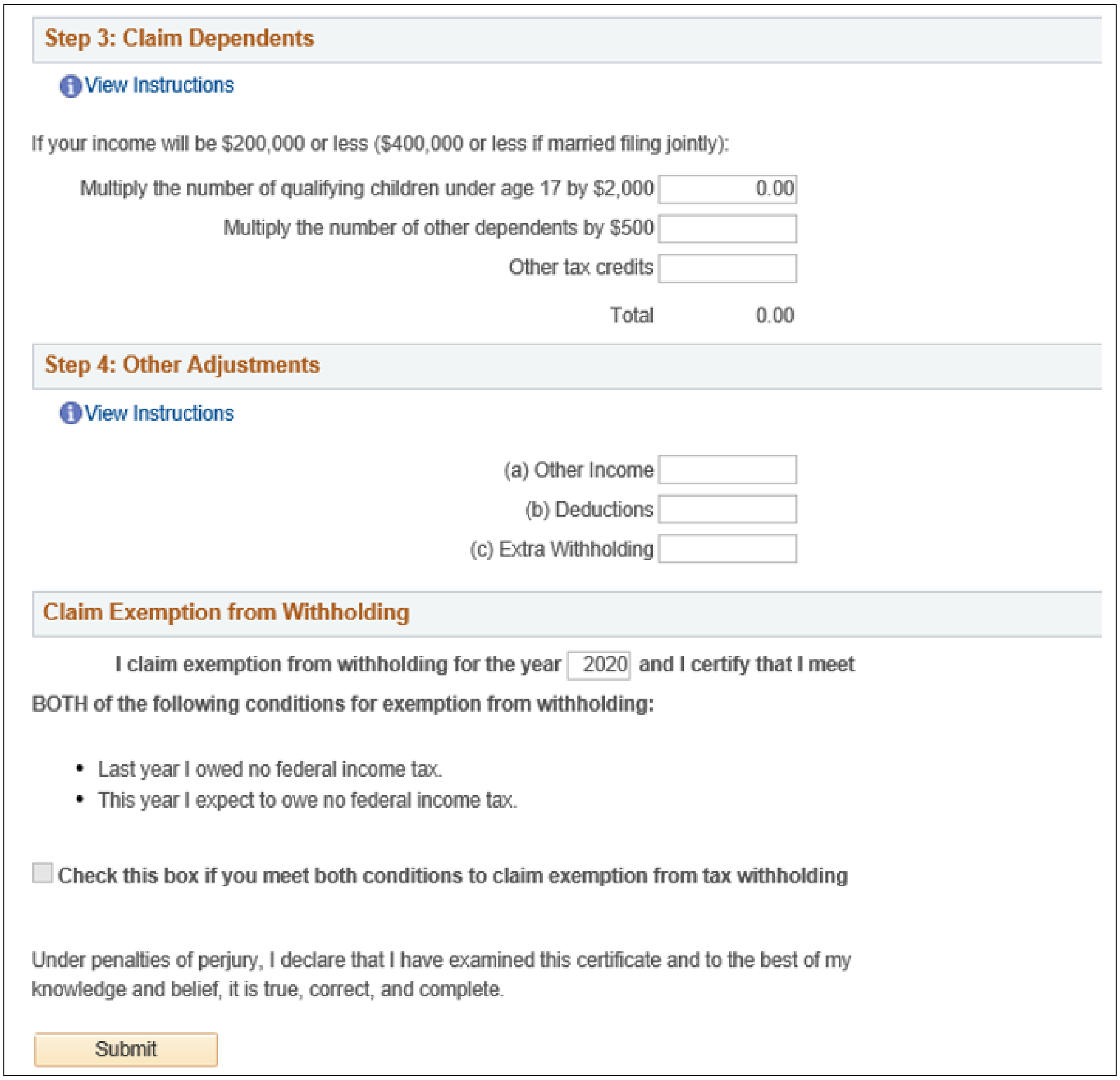
Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all these jobs.

View Instructions

☐ **Multiple Jobs or Spouse Works**

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

This example illustrates the fields and controls on the W-4 Withholding Certificate page (2 of 2).



If the special tax withholding status for the employee is set as *nonresident alien* on the Federal Tax Data page, some section labels are changed on the pages to reflect that.

Note: Payees in 1099-R companies are not allowed to update their Federal Tax Data on the W-4 Withholding Certificate page.

Considerations for Nonresident Aliens

The following behaviors apply when the employee with the *Nonresident Alien* special tax withholding status makes updates on the W-4 Withholding Certificate page:

- The default filing status is set to *Single or Married filing separately*, and the rest of the Filing Status options are not editable. This is because nonresident aliens are required to file as single.
- The employee is not allowed to select the checkbox to claim exemption from federal income tax withholding in the last section of the page.

- Instructions for filling out Form W-4 are available for review.

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.

  Note: This page has been replaced by the Paychecks page in Fluid. For more information, 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 Withholding Certificate (PY_IC_W4_DATA_2020).

  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 (USA) 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).

  Note: These pages have been replaced by page in Fluid.

  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).

  Note: These pages have been replaced by page in Fluid.

  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 Employees

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 Homepages” (Application Fundamentals).

Pages Used to Perform Payroll Tasks as Employees 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 Dashboard	HC_PY_EMP_DYN_DB (cref for the Payroll dashboard) HC_PY_EMP_DYN_DB_LINK (cref for the Payroll dashboard link)	View dynamic data and perform payroll activities using tiles.
Fluid Navigation Collection for Payroll	N/A	Access various fluid Payroll pages and perform activities using navigation collection.

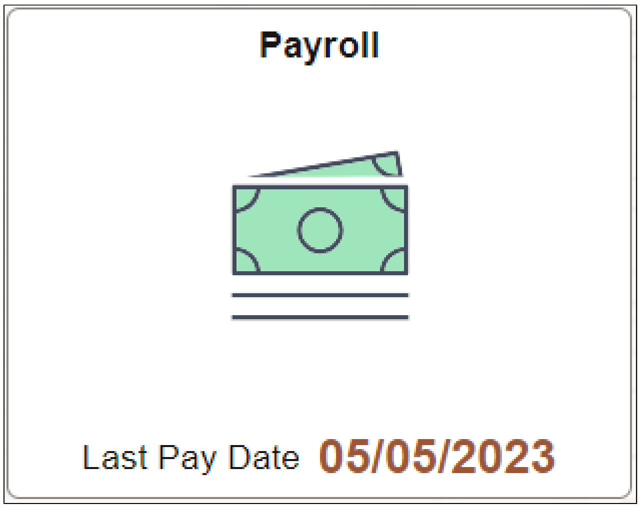
Payroll Tile

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 Homepage” (Application Fundamentals). You can add the tile, through personalization, to a system-delivered homepage or a homepage that you create.

This example illustrates the Payroll tile for the desktop.



Click the Payroll tile to access a collection of frequently-used payroll transactions using one of these navigation methods based on user role:

- Tiles on the Payroll dashboard if you are a member of the *Fluid Dashboard- ESS PNA* role.

  See Payroll Dashboard.

- Fluid navigation collection folders and links in the left panel if you are *not* a member of the *Fluid Dashboard- ESS PNA* role.

  See Fluid Navigation Collection for Payroll.

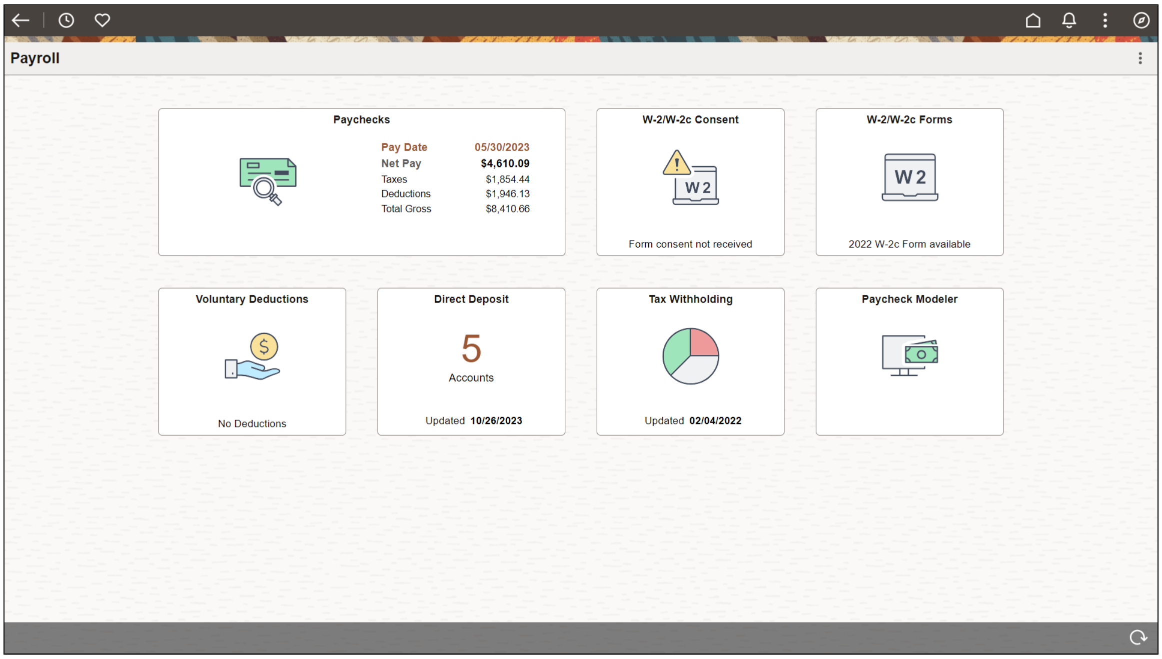
Payroll Dashboard

Use the Payroll dashboard to view dynamic data and perform payroll activities using tiles.

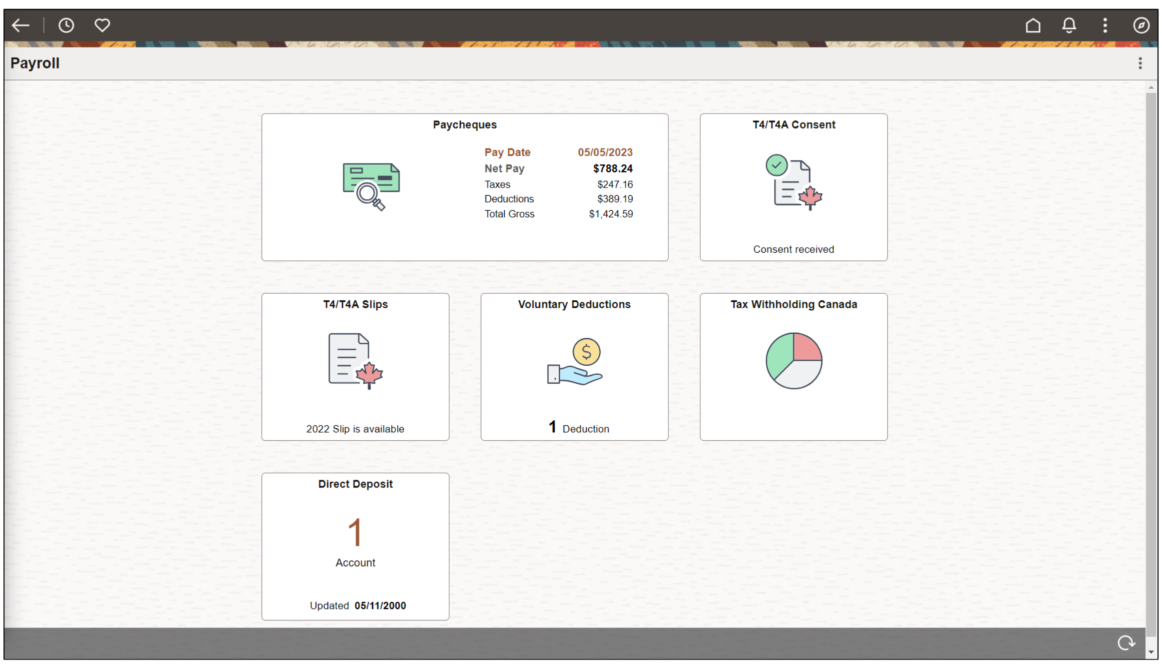
Navigation:

Click the Payroll tile. The Payroll dashboard is displayed if the logged-in user is a member of the *Fluid Dashboard- ESS PNA* user role.

This example illustrates the fields and controls on the (USA) Payroll Dashboard.



This example illustrates the fields and controls on the (CAN) Payroll Dashboard.



Video: Image Highlights, PeopleSoft HCM Update Image 34: Self-Service Navigation Updates

Each tile lists pertinent data of the corresponding payroll transaction for quick reference. For example, the Paychecks tile displays highlight information of the employee's most recent paycheck.

Click the tile of a transaction to access the page to view more details about that transaction, and perform actions.

See Transactions Accessible From the Payroll Tile.

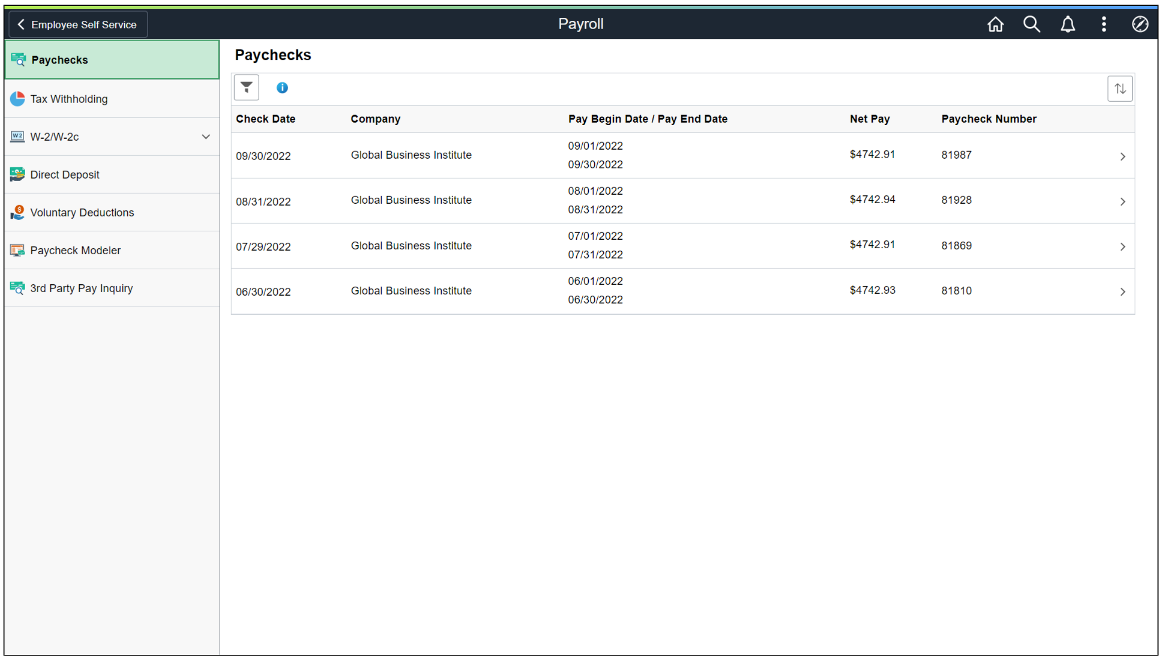
Fluid Navigation Collection for Payroll

Use the fluid navigation collection in the left panel to access various fluid Payroll pages and perform activities.

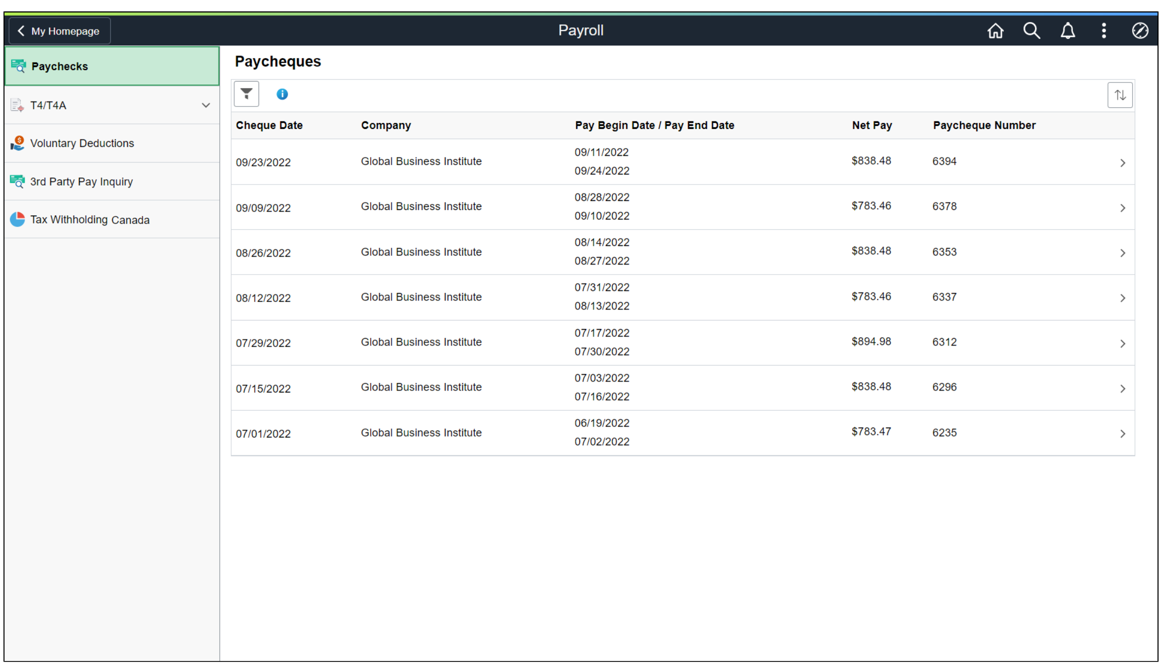
Navigation:

Click the Payroll tile. The Payroll navigation collection is displayed if the logged-in user is a *not* member of the *Fluid Dashboard- ESS PNA* user role.

This example illustrates the (USA) Payroll application start page.



This example illustrates the (CAN) Payroll application start page.



Click a navigation collection component in the left panel to access its transaction page in the right content area. By default, the system displays the transaction page of the first navigation collection component.

See Transactions Accessible From the Payroll Tile.

Transactions Accessible From the Payroll Tile

This table lists the transactions that are accessible from the Payroll tile using either tiles on the Payroll dashboard, or the Fluid navigation collection:

Dashboard Tile Name	*Navigation Collection Name*	*Reference*
(USA) Paychecks (CAN) Paycheques	Paychecks	See Using the PeopleSoft Fluid User Interface to View Paychecks.
(USA) Tax Withholding (CAN) Tax Withholding Canada	(USA) Tax Withholding (CAN) Tax Withholding Canada	See (USA) Using the PeopleSoft Fluid User Interface to Update PDF Tax Forms and (CAN) Using the PeopleSoft Fluid User Interface to Update PDF Tax Forms.
(USA) • 1042-S Consent • 1042-S Forms	N/A	See (USA) Using the PeopleSoft Fluid User Interface to Manage Consent and View Electronic Year-End Forms.
(USA) • 1099-R Consent • 1099-R Forms	N/A	See (USA) Using the PeopleSoft Fluid User Interface to Manage Consent and View Electronic Year-End Forms.
(USA) • W-2/W-2c Consent • W-2/W-2c Forms	(USA) W-2/W-2c • W-2/W-2c Consent • View W-2/W-2c Forms	See (USA) Using the PeopleSoft Fluid User Interface to Manage Consent and View Electronic Year-End Forms.

Dashboard Tile Name	***Navigation Collection Name***	***Reference***
(CAN All) • T4/T4A Consent • T4/T4A Slips	(CAN All) T4/T4A • T4/T4A Consent • View T4/T4A Slips	See (CAN) Using the PeopleSoft Fluid User Interface to Manage Consent for Electronic Year-End Forms.
(CAN Quebec only) • RL-1/RL-2 Consent • RL-1/RL-2 Slips	(CAN Quebec only) RL-1/RL-2 • RL-1/RL-2 Consent • View RL-1/RL-2 Slips	See (CAN) Using the PeopleSoft Fluid User Interface to Manage Consent for Electronic Year-End Forms.
Direct Deposit	Direct Deposit	See Using the PeopleSoft Fluid User Interface to Add and Modify Direct Deposit Accounts.
Voluntary Deductions	Voluntary Deductions	See Using the PeopleSoft Fluid User Interface to Manage Additional Payroll Information.
(USA) Paycheck Modeler	(USA) Paycheck Modeler	See Using the PeopleSoft Fluid User Interface to Manage Additional Payroll Information.
N/A	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

Note: Classic pages used in viewing paychecks have been replaced by equivalent pages in Fluid. 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 screen reader mode even if the paycheck would otherwise be available in PDF format.
“View Self Service Paycheck Page” (PeopleSoft 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 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 employees 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 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 fields on the Paycheck Options Table page.

Self-Service Paychecks for Accessibility Users

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

Note: You must set up the Paycheck Availability fields to prevent the employee from seeing future-dated checks in screen reader mode. If the Paycheck Availability field values are not specified, paychecks and advices are viewable as soon as the Confirm process is completed.

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 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 Payroll for North America)

“Printing Paychecks and Direct Deposit Advices” (PeopleSoft 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 Homepages” (Application Fundamentals) in your PeopleSoft HCM Application Fundamentals product documentation.

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

Video: 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.
Paychecks Page Paycheques Page	PY_IC_PI_LIST_FLU	View a list of recent paychecks and access details for a selected paycheck.
View Paycheck Page View Paycheque Page	PY_IC_PI_PCHOM_SCF	(Smartphone only) View a summary of data for the selected paycheck, access paycheck data details, and access paycheck PDFs.
View Paycheck Page View Paycheque Page	PY_IC_PI_DATA_SCF	(Laptop and tablet) View details of the selected paycheck.

Page/Tile Name	***Definition Name***	***Usage***
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.
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.
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. See an example of the Before-Tax Deductions page shown under the View Paycheck 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.

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:** 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 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:** 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 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 (or paycheque), including check number and amount and, if direct deposit is set up, direct deposit advice number and amount.
Paycheck Analytics Page Paycheque Analytics Page	PY_IC_PI_PCANA_SCF	(Smartphone only) • (USA) View data for the selected paycheck in pie chart form. • (CAN) View data for the selected paycheque in pie chart form.

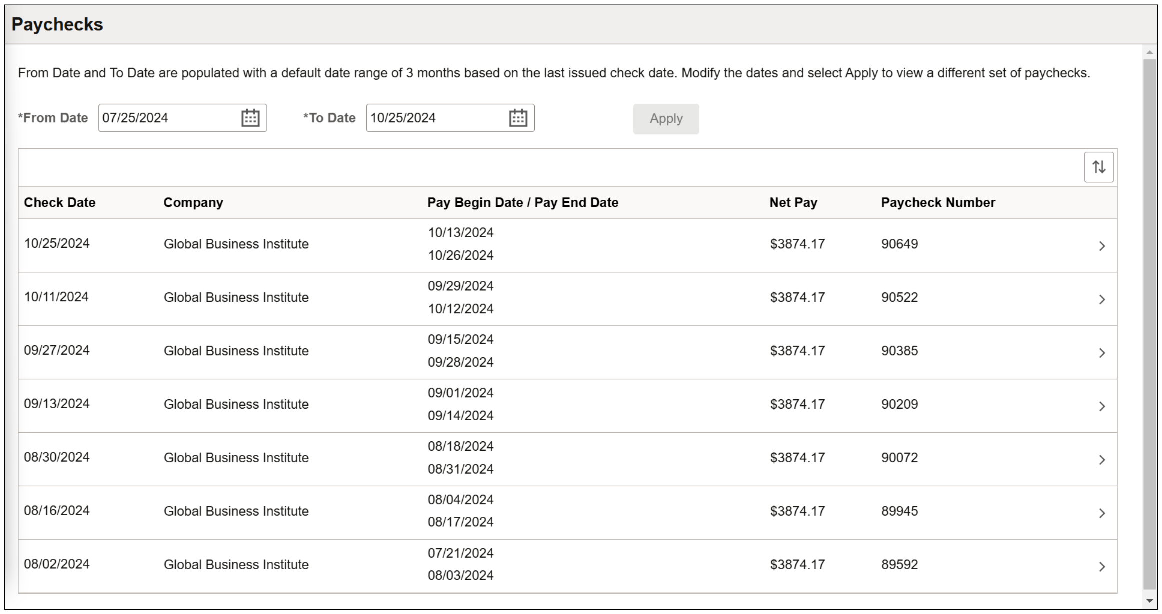
Paychecks Page

Use the (USA) Paychecks page or (CAN) Paycheques 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.

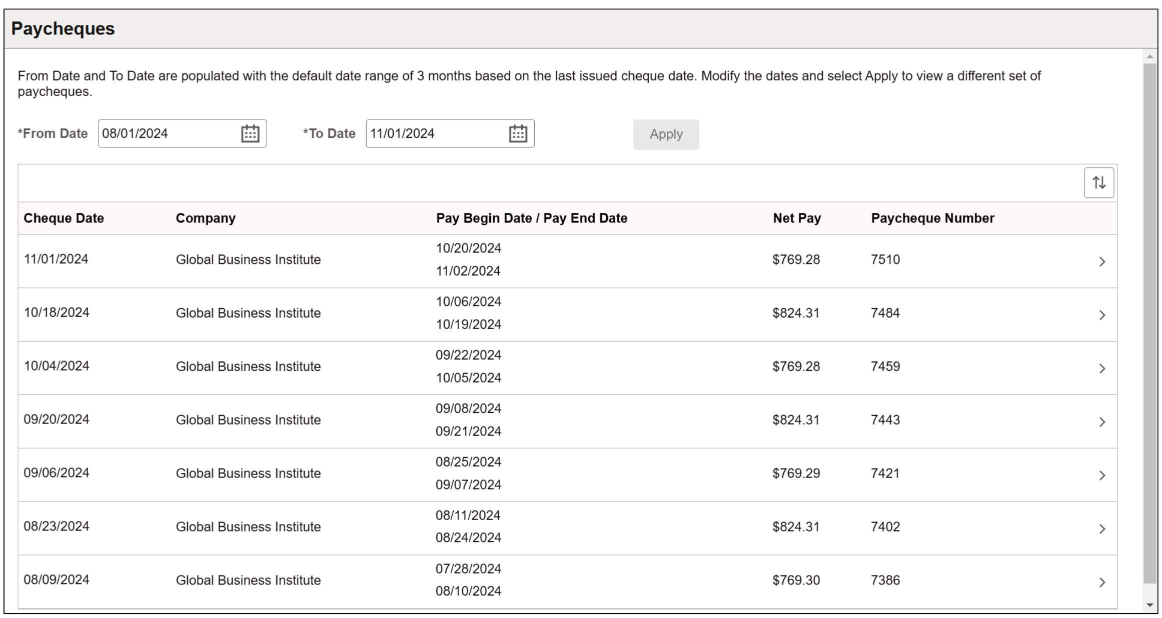
Navigation:

- Click the (USA) **Paychecks** tile or (CAN) **Paycheques** tile from the Payroll Dashboard.
- Click **Paychecks** from the Fluid Navigation Collection for Payroll.
- (Navigator) **Self Service** > **Payroll and Compensation** > **Pay**

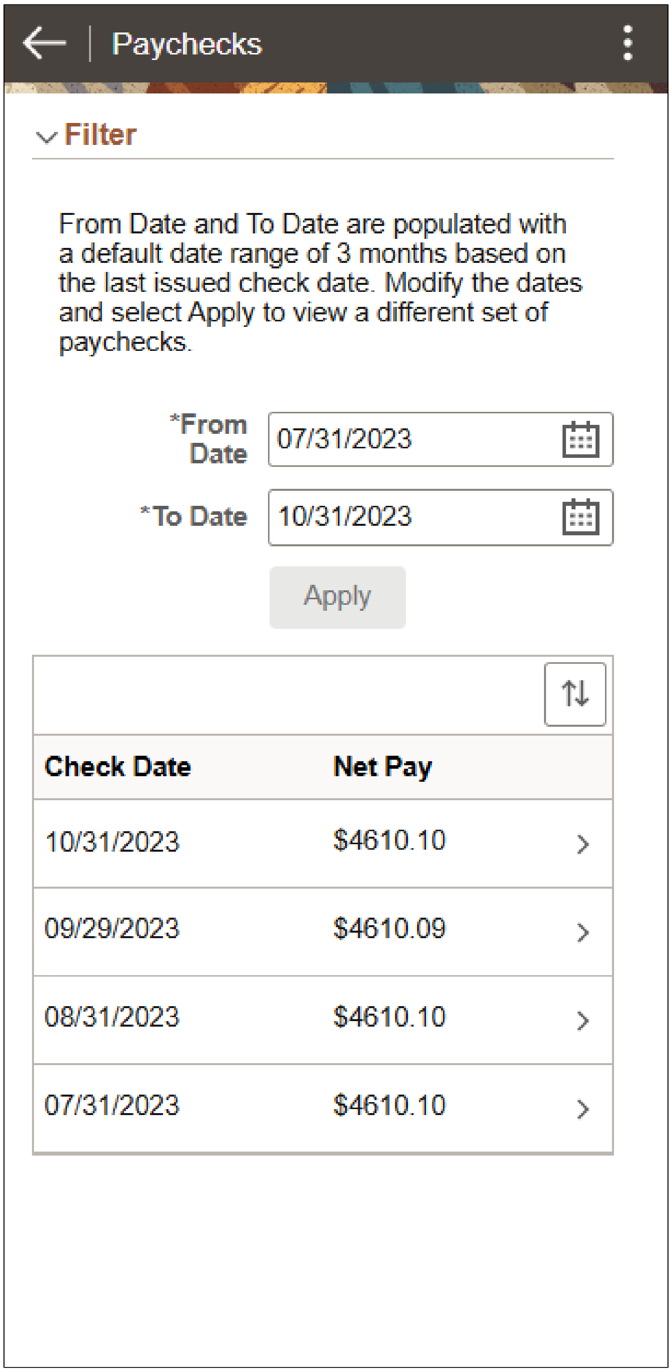
(Laptop) This example illustrates the Paychecks page for U.S. users.



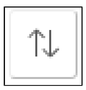
(Laptop) This example illustrates the Paycheques page for Canadian users.



(Smartphone) This example illustrates the Paychecks page.



Paychecks

Field or Control	*Description*
From Date and **To Date**	Specify the date range to filter the list of paychecks that appear. By default, the system prepopulates: • The **To Date** field with the most recent check date • The **From Date** field with the date that is three month before the To date. 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>	Select to the view details of the corresponding paycheck or paycheque. (For tablet and laptop) View paycheck details: • In PDF format in a new browser tab or window if the PDF is available, or • On the View Paycheck Page (or View Paycheque page) if the PDF is not available. (For smartphone) View paycheck details on the View Paycheck Page (or View Paycheque page). If the PDF is available, select the **View PDF Paycheck** link that appears on the View Paycheck page to view it. PDF and non-PDF paycheck availability is set on the “Paycheck Options Table Page” (PeopleSoft 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 Payroll for North America).

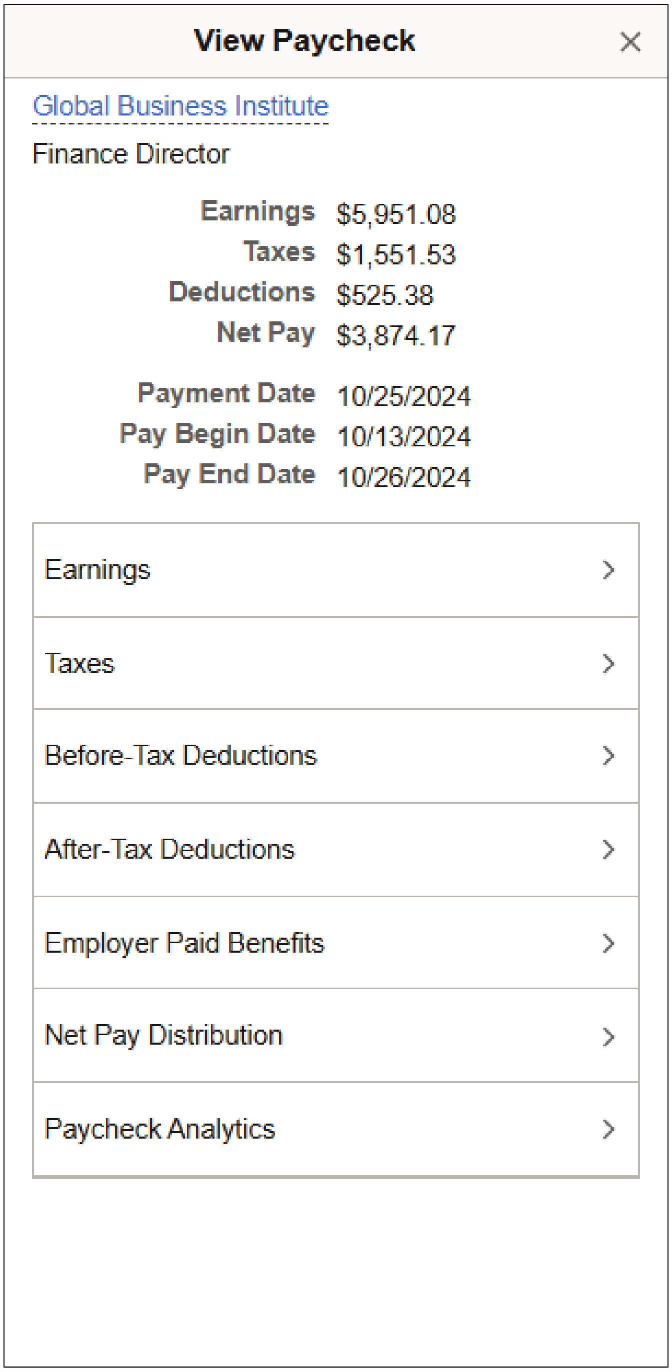
View Paycheck Page

(Smartphone only) Use the (USA) View Paycheck page or (CAN) View Paycheque page (PY_IC_PI_PCHOM_SCF) to view a summary of data for the selected paycheck, to access paycheck data details, and to access paycheck PDFs.

Navigation:

Click a row on the Paychecks page.

(Smartphone) This example illustrates the View Paycheck page).



Accessing Smartphone Detail Pages

Click any row on the View Paycheck page or View Paycheque 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 the **Year-to-Date** tab.

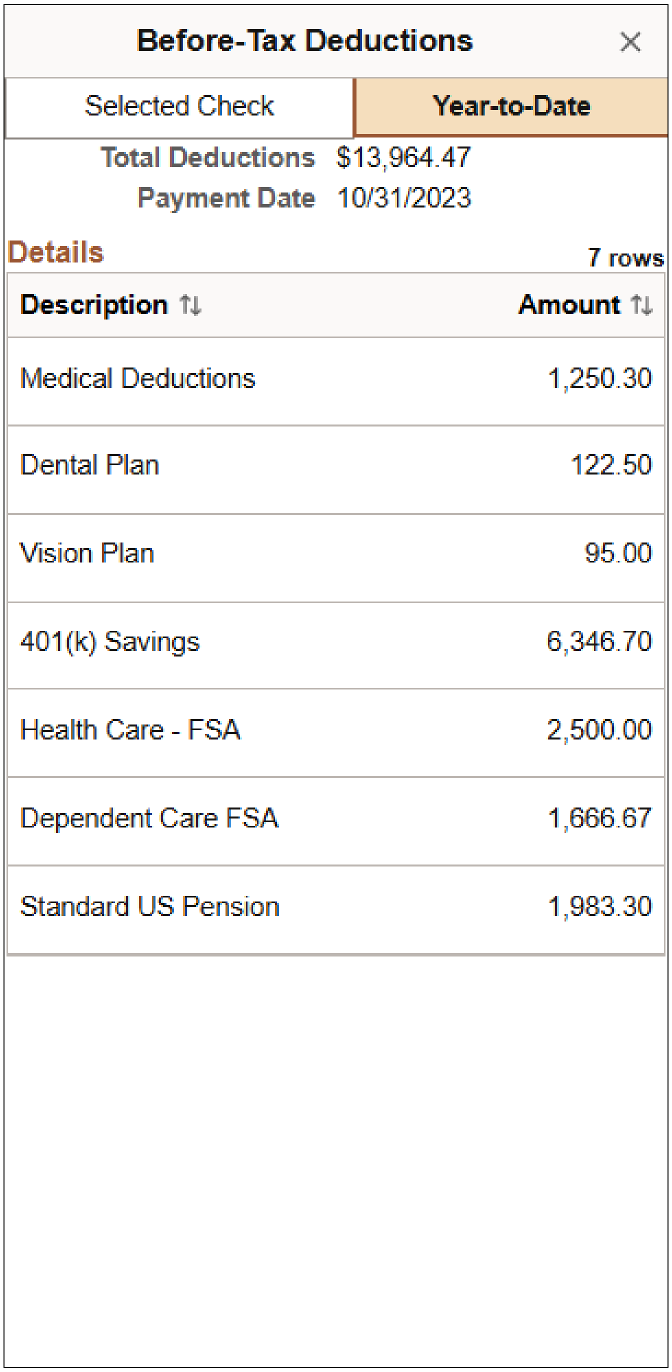
The Year-to-Date tab is available on the following smartphone detail pages if the **PDF Paychecks Only** option is selected in the **General** section of the “Paycheck Options Table Page” (PeopleSoft Payroll for North America):

- 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 (PY_IC_PI_PCPTX_SCF) 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.

(Smartphone) This example illustrates the Before-Tax Deductions page, Year-to-Date tab.



Viewing PDF Paychecks

Employees may have access to both of their PDF and non-PDF paychecks. If paycheck PDFs are available, the **View PDF Paycheck** link appears on the (USA) View Paycheck page or (CAN) View Paycheque 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 View Paycheck page if both the **PDF Paychecks Only** and **PDF Paychecks** options are selected on the “Paycheck Options Table Page” (PeopleSoft Payroll for North America).

For more information on PDF paychecks, see “Setting Up to Print and View Paychecks and Year-End Pay Forms with BI Publisher (BIP)” (PeopleSoft Payroll for North America).

Note: If masking of direct deposit accounts is configured for wage statements on the “Payroll for NA Installation Page” (PeopleSoft 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 Payroll for North America).

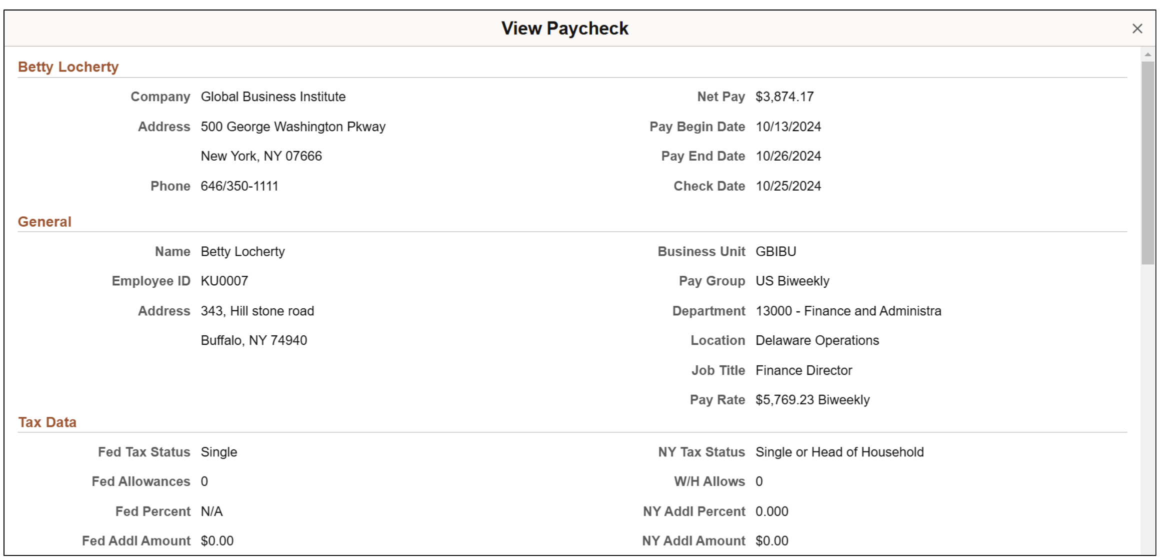
View Paycheck Page

(Laptop and tablet) Use the (USA) View Paycheck page or (CAN) View Paycheque page (PY_IC_PI_DATA_SCF) to view details of the selected paycheck or paycheque.

Navigation:

- (USA) Click a row on the Paychecks page.
- (CAN) Click a row on the Paycheques page.

(Laptop) This example illustrates the View Paycheck page (1 of 4).



(Laptop) This example illustrates the View Paycheck page (2 of 4).

Paycheck Summary

Period	Gross Earnings	Fed Taxable Gross	Total Taxes	Total Deductions	Net Pay
Current	5,951.08	5,573.51	1,551.53	525.38	3,874.17

Earnings

Description	Hours	Rate	Amount
Regular	80.00	72.115385	5,769.23
Gen Cred			150.00
Med Cred			30.00
Den Cred			1.85
Total:	80.00		5,951.08

Current Total Hours Worked 80.00

Taxes

Description	Amount
Fed Withholding	1,014.66
NY Withholding	319.05
NY OASDI/EE	1.20
NY NEW YORK Withholding	216.62
Total:	1,551.53

(Laptop) This example illustrates the View Paycheck page (3 of 4).

Before-Tax Deductions

Description	Amount
Medical	57.23
Dental	4.96
401(k)	200.00
Std US Pen	115.38
Total:	377.57

After Tax Deductions

Description	Amount
Suppl Life	145.38
AD&D Flat	0.12
STD (High)	2.31
Total:	147.81

Employer Paid Benefits

Description	Amount
Medical	57.23
Dental	2.31
Basic Life	46.15
Suppl Life	69.23
AD&D Flat	0.92
STD (High)	5.77
401(k)	200.00
Std US Pen	115.38
Total:	496.99

(Laptop) This example illustrates the View Paycheck page (4 of 4).

Net Pay Distribution

Payment Type	Paycheck Number	Account Type	Account Number	Amount
Check	90649	Issue Check		3,874.17

Paycheck Analytics Page

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

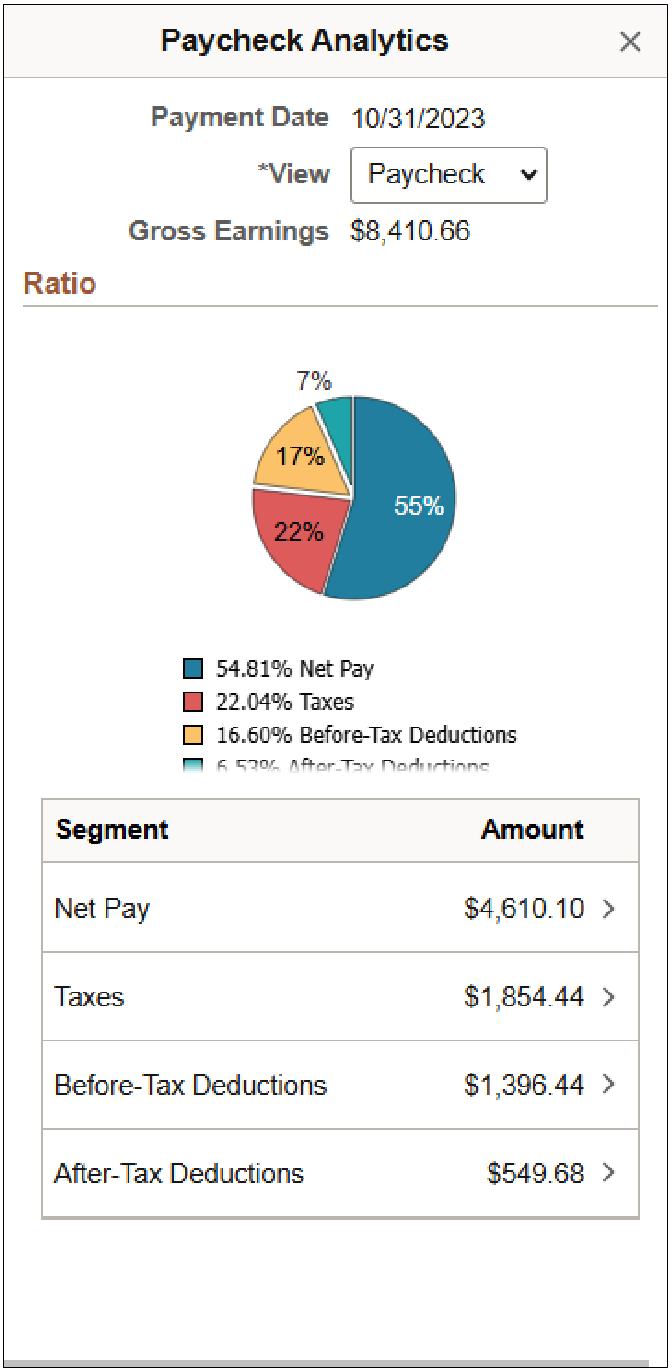
Navigation:

- (USA) Click the Paycheck Analytics row on the View Paycheck page.
- (CAN) Click the Paycheque Analytics row on the View Paycheque 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 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 Payroll for North America).

(Smartphone) This example illustrates the Paycheck Analytics page.



Field or Control	***Description***
View	Click to switch the pie chart display between the 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 (or provincial) tax withholding information in Fluid Employee Self-Service.

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

(USA) Using the PeopleSoft Fluid User Interface to Update PDF Tax Forms
(CAN) 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 security roles for employees, administrators, and approvers to work with updateable PDF tax forms. See the Prerequisites section for the list of user roles delivered for the updateable PDF tax forms functionality.
PDF Tax Form Table Page	PY_PDF_TAXFORM or PY_PDF_TAXFORM_CN	Define self-service updateable PDF tax forms.
Jurisdiction Error Options Page	PY_PDF_AWE_OPTN or PY_PDF_AWE_OPTN_CN	Define which changes on the tax withholding forms pages require Payroll Administration notification or approval.
Tax Jurisdiction Mapping Page	PY_JUR_MAPPING or PY_JUR_MAPPING_CN	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 or PY_PDF_COMP_MAP_CN	Specify access control, mapping, notification preferences (USA only), and approval preferences in jurisdictions for companies.

Page Name	Definition Name	Usage
Withholding Form PDF Mapping Page	PY_W4_FORM_MAP or PY_TD1_FORM_MAP_CN	View the fields and parameters that are mapped between the updateable agency PDF and the PeopleSoft BI Publisher template.
Tax Withholding Forms Page	PY_VIEW_WH_FORM or PY_VIEW_TD1_FORM	View tax withholding forms submitted by employees.

Understanding Updateable PDF Tax Forms

Oracle's PeopleSoft Payroll for North America provides updateable PDF tax forms to enable U.S. employees to update their federal and state tax withholding information, as well as Canadian employees to update their federal and provincial tax withholding information in Fluid Employee Self-Service.

The Self-Service Transaction

Employees access updateable tax forms from the:

- (USA) Tax Withholding tile.
- (CAN) Tax Withholding Canada tile.

The system extracts the employee's data from PeopleSoft and prepopulates 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.

Notification

The system supports the delivery of notifications when:

- Tax withholding form update is submitted by the employee.
- Tax withholding form update fails.
- Tax withholding form update is successful.

  While employees are the recipients of the notifications for successful updates, payroll administrators also receive notifications in the case of TD1 Indian form updates. When a TD1 Indian form change is submitted and later updated to the database, the system sends a notification to the payroll administrator. The message notifies the administrator that the Percent Exempt value is set to 100% as default, which needs to be reviewed and updated accordingly for the employee on the Update Employee Tax Data page.

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 approver for approval first, and updates the data in the database only after the approval is granted. Notifications are also delivered as part of the approval process, when update requests are submitted for approval, denied, or approved.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

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).**

Updateable PDF Configuration

Oracle delivers updateable PDF tax form functionality with federal and state jurisdictions for USA and federal and provincial jurisdictions for Canada.

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.

It is the customer's responsibility to set up jurisdiction mapping for each company on the Company Mapping Page.

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: Updateable PDF tax forms are not available in tablets or smartphones.

Users must be assigned the appropriate roles in order to submit, review, or approve tax withholding requests. System-delivered roles include:

- For employees:
    - (All) *PeopleSoft User*
    - (USA) *NA Payroll WH Form User*

    - (CAN) *NA Payroll Canada WH Form User*

- For payroll administrators:
    - (USA) *NA Payroll WH Form Admin*
    - (CAN) *NA Payroll Can WH Form Admin*

- For tax withholding request approvers:
    - (USA) *NA Payroll WH Form Approver*
    - (CAN) *NA Payroll Canada WH Approver*

For approvers 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 federal (and each state for USA or province for CAN) on the Company Mapping Page.

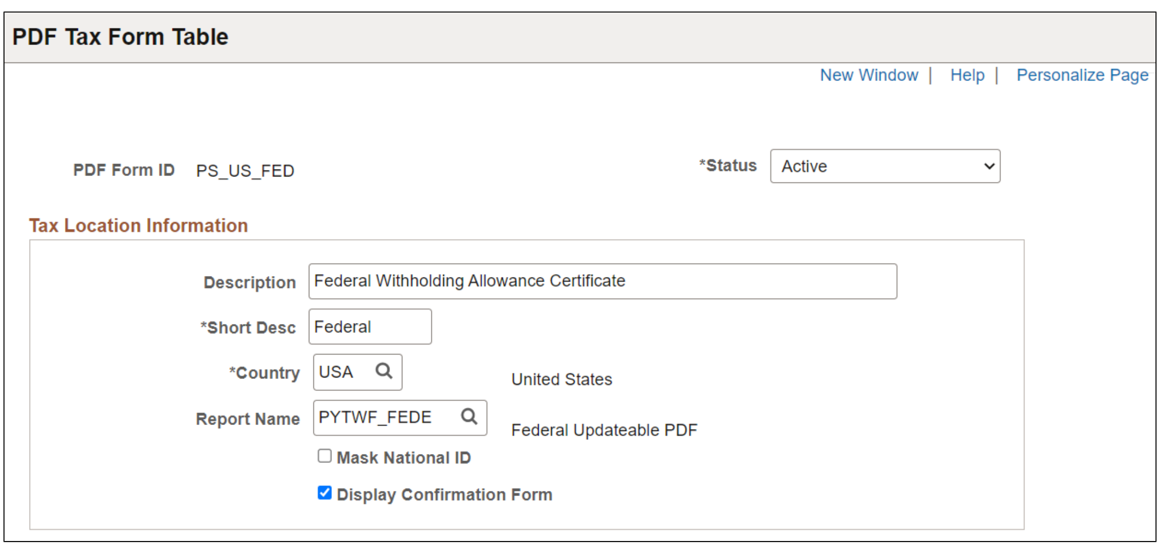
PDF Tax Form Table Page

Use the PDF Tax Form Table page (PY_PDF_TAXFORM or PY_PDF_TAXFORM_CN) define self-service updateable PDF tax forms.

Navigation:

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

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



Field or Control	*Description*
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 (Social Security Number for USA or Social Insurance Number for Canada) on the employee's updateable PDF tax form. **Note:** The full number appears for users with the Payroll Administrator role regardless of this setting.
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. This check box is selected by default in all PeopleSoft-delivered PDF tax forms. The confirmation PDF appears regardless of this setting. 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.

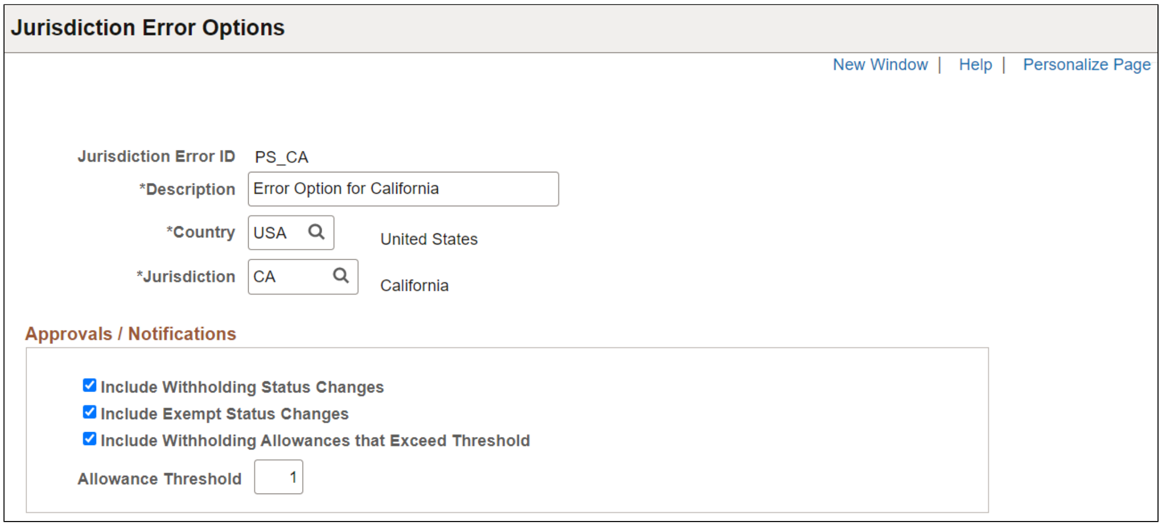
Jurisdiction Error Options Page

Use the Jurisdiction Error Options page (PY_PDF_AWE_OPTN or PY_PDF_AWE_OPTN_CN) to define which changes on the tax withholding forms pages require payroll administration notification or approval.

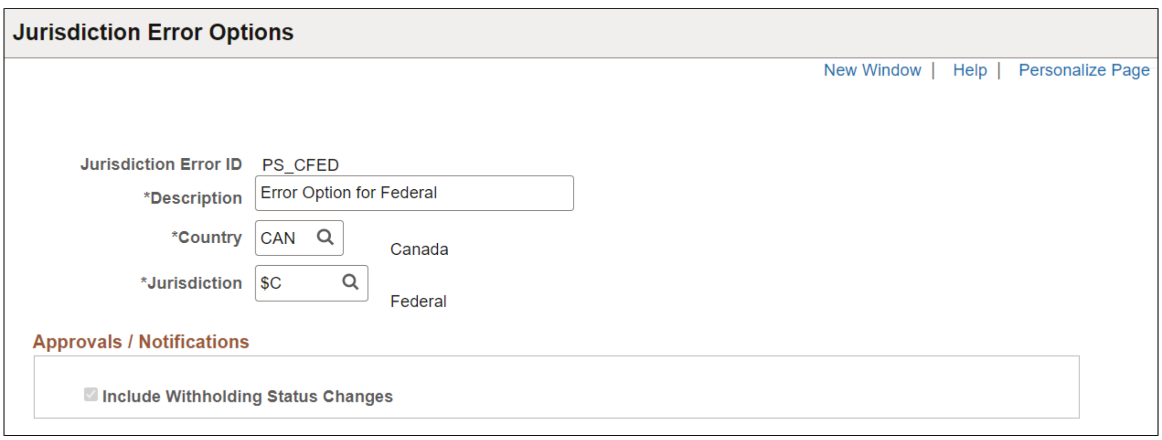
Navigation:

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

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



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



Approvals / Notifications

Field or Control	***Description***
Include Withholding Status Changes	If AWE is enabled, selecting this check box submits to the approver 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. (CAN) This option is selected by default and is not editable. If AWE is enabled for Canada, the approval process will be triggered when any change is made to the form, regardless of what that change is. In AWE is disabled for Canada, no approval notification will be triggered to the approvers. Submitted details will be updated to the database directly. 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 approver for approval if the employees have changed their status to *Exempt* in the form. 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. This field is applicable to USA only. Settings on the Company Mapping Page determine if this is a notification or if approval is needed.

Field or Control	***Description***
Include Withholding Allowances that Exceed Threshold	If AWE is enabled, selecting this check box submits to the approver for approval if the withholding allowance changes exceed the value that is specified on the **Allowance Threshold** field. 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. This field is applicable to USA only. 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. This field is applicable to USA only.

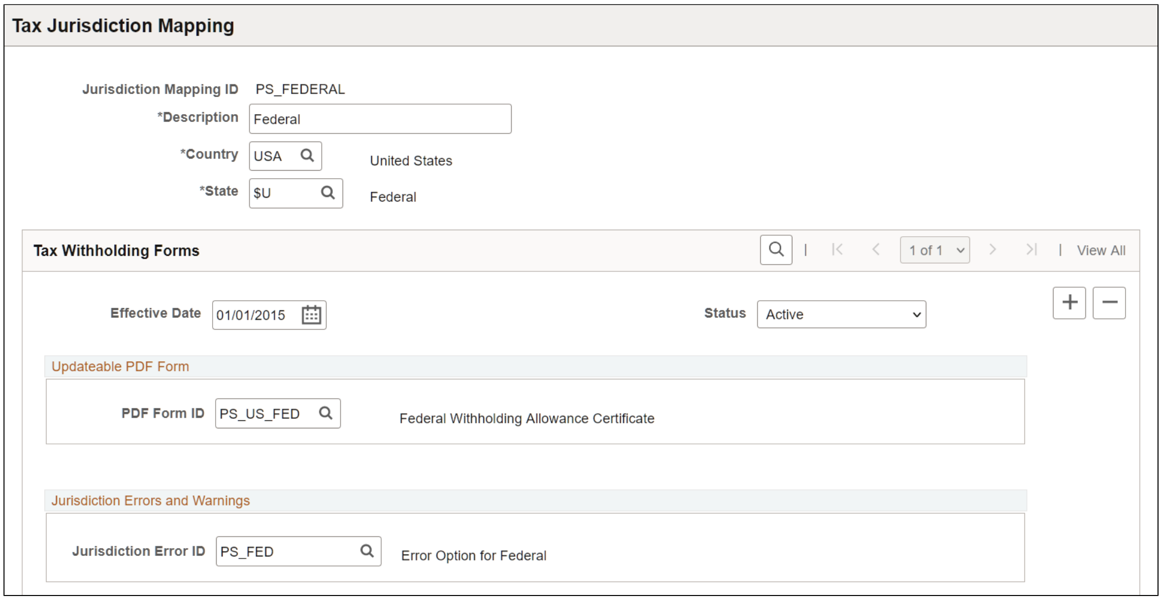
Tax Jurisdiction Mapping Page

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

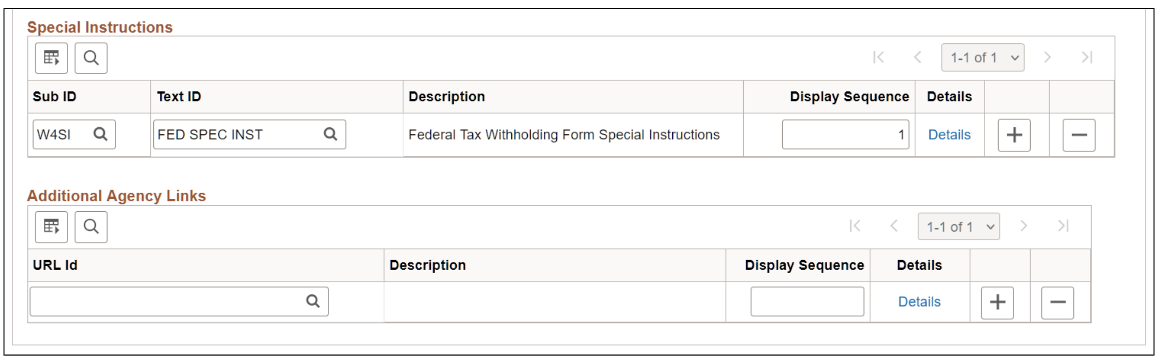
Navigation:

- **Set Up HCM** > **Product Related** > **Payroll for North America** > **Updateable Withholding Forms** > **Tax Jurisdiction Mapping**
- **Set Up HCM** > **Product Related** > **Payroll for North America** > **Updateable Canada Forms** > **Tax Jurisdiction Mapping**

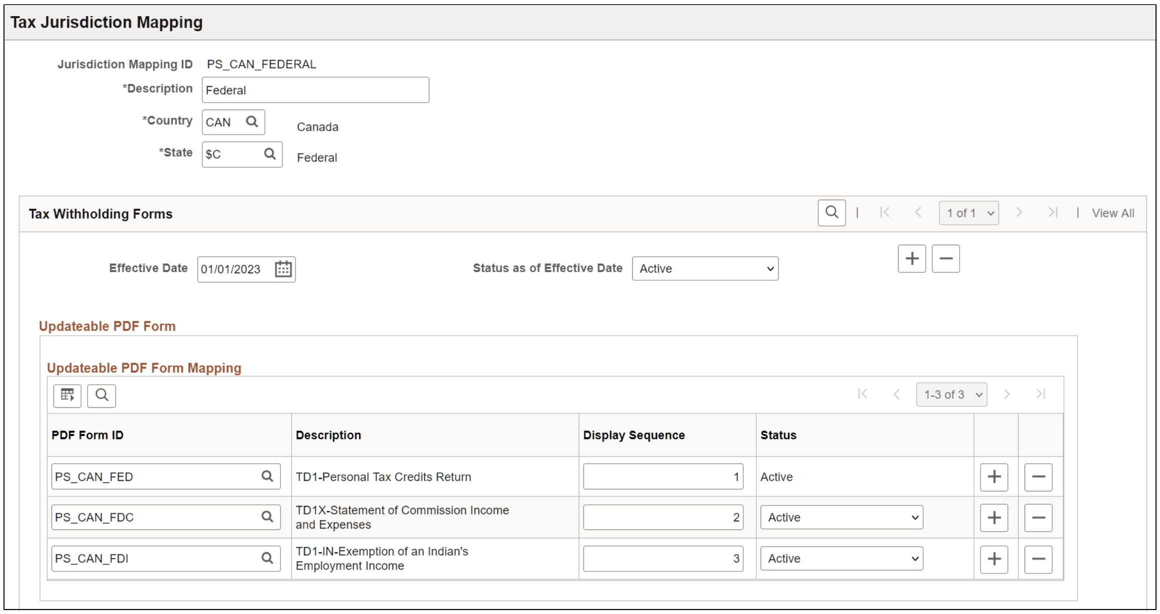
This example illustrates the fields and controls on the (USA) Tax Jurisdiction Mapping page (1 of 2).



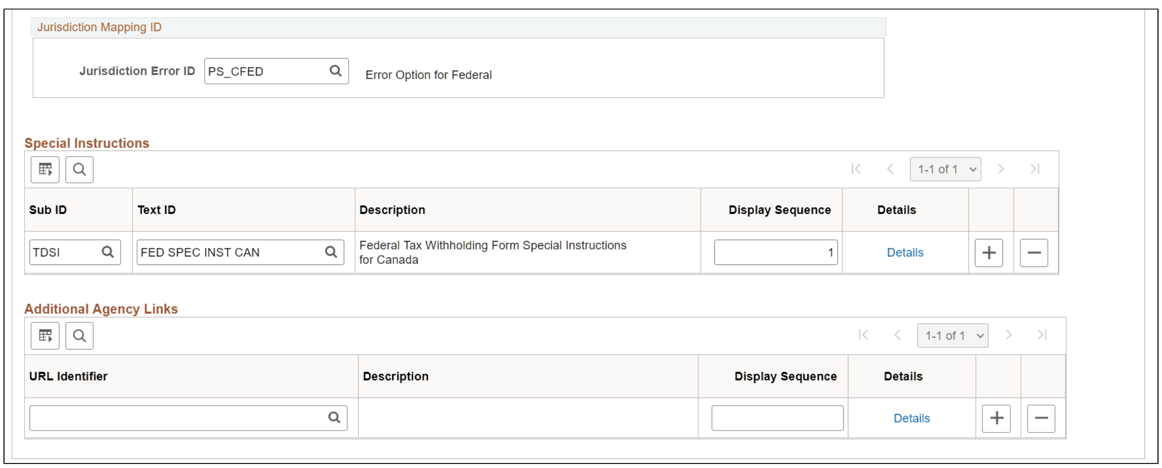
This example illustrates the fields and controls on the (USA) Tax Jurisdiction Mapping page (2 of 2).



This example illustrates the fields and controls on the (CAN) Tax Jurisdiction Mapping page (1 of 2).



This example illustrates the fields and controls on the (CAN) Tax Jurisdiction Mapping page (2 of 2).



Note: Payroll for North America delivers tax jurisdiction mappings for U.S. federal, states and territories, as well as Canadian federal, provinces and territories.

(USA) Updateable PDF Form or (CAN) Updateable PDF Form Mapping

Field or Control	***Description***
PDF Form ID	Specify the updateable PDF tax form to use for this jurisdiction. Available forms are from the PDF Tax Form Table Page. (CAN) The system supports multiple updateable PDF tax forms for the federal jurisdiction, for example, TD1, TD1X, and TD1-IN. Multiple forms are also available for the *Quebec* province.
(CAN only) **Display Sequence**	Enter a unique order number in which the tax form is displayed on the tax withholding forms page in Employee Self-Service.
(CAN only) **Status**	A form becomes available for update on the Federal Tax Withholding Forms Page in Employee Self-Service, if its status is set to *Active.* For example, the status for Form TD1 is always set to *Active,* and is configurable for Forms TD1X and TD1-IN.

(USA) Jurisdiction Errors and Warnings or (CAN) Jurisdiction Mapping ID

Field or Control	***Description***
Jurisdiction Error ID	Select the error or warning to use when AWE is enabled. Errors and warnings are available from the Jurisdiction Error Options Page.

Special Instructions

Field or Control	***Description***
Sub ID	Select the Text Catalog Sub ID for the text to use as special instructions for the updateable PDF tax form.

Field or Control	*Description*
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 tax withholding forms page. See special instruction examples on the (USA) Federal Tax Withholding Forms Page, (CAN) Federal Tax Withholding Forms Page, or the (USA) State Tax Withholding Forms Page.
Display Sequence	Enter a unique display order number for the text.
Details	Select to view the content of the selected text ID.

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

Additional Agency Links

Field or Control	*Description*
URL Id or **URL Identifier**	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.*
Display Sequence	Enter a unique display order number for the link.
Details	Select to view the link address.

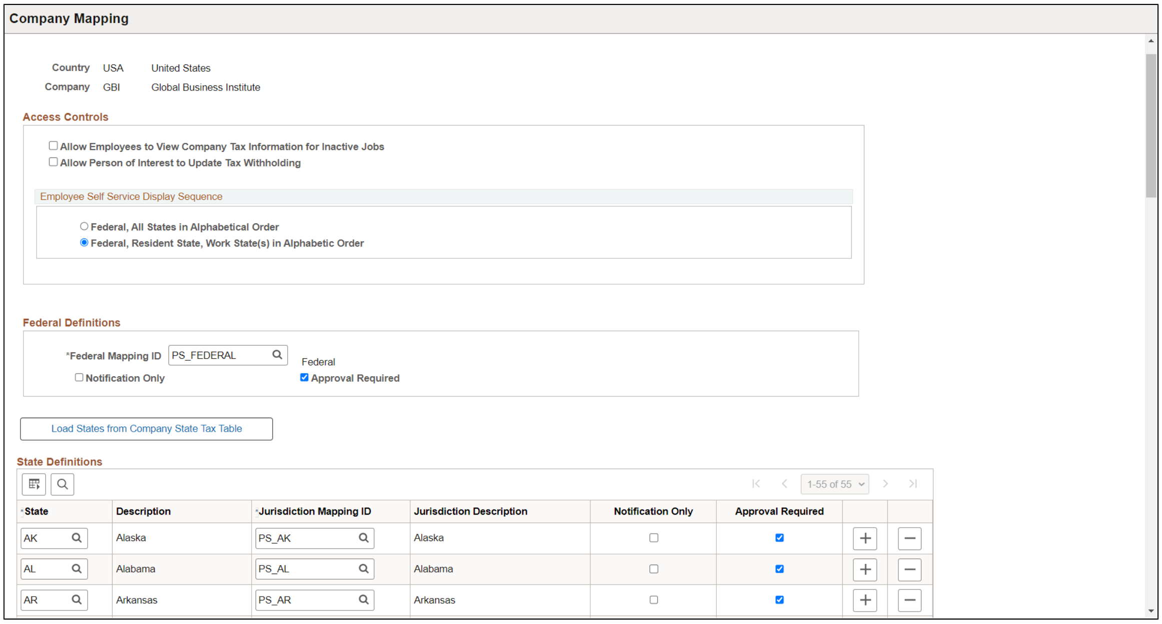
Company Mapping Page

Use the Company Mapping page (PY_PDF_COMP_MAP or PY_PDF_COMP_MAP_CN) to specify access control, mapping, as well as notification preferences (USA only) and approval preferences in jurisdictions for companies.

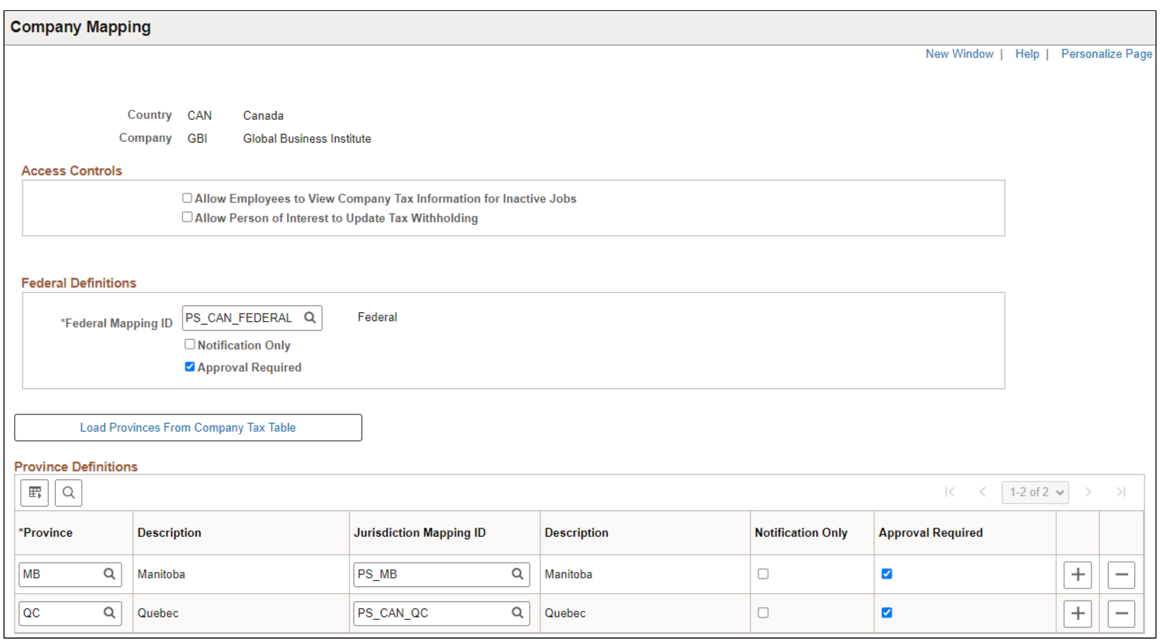
Navigation:

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

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



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



Access Controls

Field or Control	***Description***
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 tax withholding forms 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.
Allow Person of Interest to Update Tax Withholding	Select this check box to allow persons of interest to update their tax withholding information in Employee Self-Service.

Employee Self Service Display Sequence

Note: This section is applicable to USA only.

Field or Control	***Description***
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.

Federal Definitions

Field or Control	***Description***
Federal Mapping ID	Select the mapping definition defined on the Tax Jurisdiction Mapping Page for the federal jurisdiction.

Field or Control	*Description*
Notification Only	Select this check box to send a notification to the Payroll Administrator when employees make the changes defined on the Jurisdiction Error Options Page. **Note:** This field is applicable to USA only.
Approval Required	Select this check box for Approval Workflow Engine (AWE), if enabled, to submit changes to the approver for approval before updating tax records in the system. For more information about AWE, see “Understanding Approvals” (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 tax withholding forms page. The employee can select the chevron 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 approver has entered approval.
(USA) **Load States from Company State Tax Table** (CAN) **Load Provinces from Company Tax Table**	When the Company Mapping page appears for an unmapped company, the State Definitions or Province Definitions grid is empty. Use the button to load all of the state or province definitions that are defined in the Company State Tax Table.

(USA) State Definitions or (CAN) Province Definitions

Field or Control	*Description*
Jurisdiction Mapping ID	Select the mapping definition for the state or province. PeopleSoft delivers predefined mapping definitions on the Tax Jurisdiction Mapping Page. To save the **Company Mapping** page, you must identify the **Jurisdiction Mapping ID** for each state or province that you want to use, and delete all rows that you do not want to use.

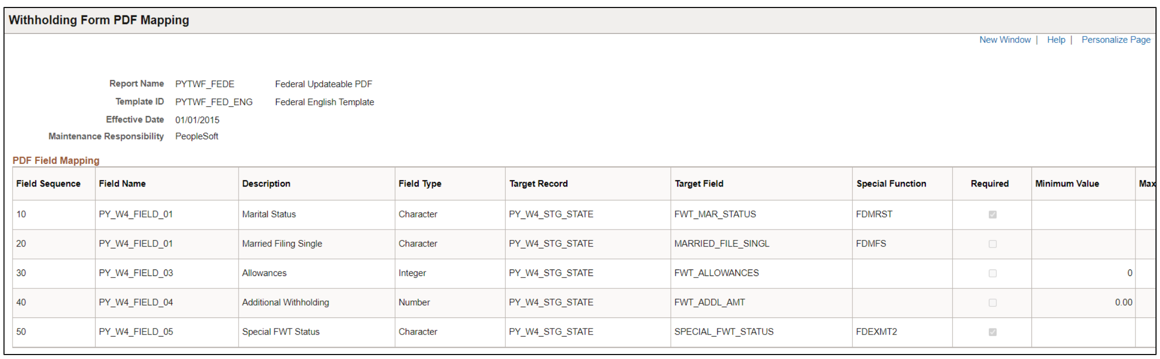
Withholding Form PDF Mapping Page

Use the Withholding Form PDF Mapping page (PY_W4_FORM_MAP or PY_TD1_FORM_MAP_CN) 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**
- **Set Up HCM** > **Product Related** > **Payroll for North America** > **Updateable Canada Forms** > **Withholding Form PDF Mapping**

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



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.

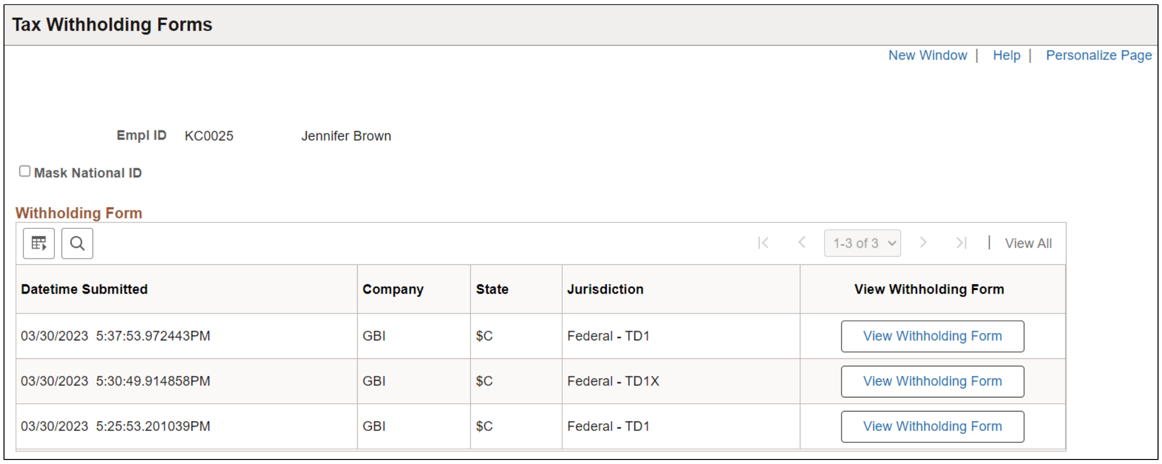
Tax Withholding Forms Page

Payroll administrators use the Tax Withholding Forms (PY_VIEW_WH_FORM or PY_VIEW_TD1_FORM) to view tax withholding forms submitted by employees.

Navigation:

- **Payroll for North America** > **Employee Pay Data USA** > **Tax Information** > **Tax Withholding Forms**
- **Payroll for North America** > **Employee Pay Data CAN** > **Tax Information** > **Tax Withholding Forms**

This example illustrates the fields and controls on the Tax Withholding Forms page.



Field or Control	***Description***
Mask National ID	Select to mask the national ID that is shown in the tax withholding forms. When selected, only the last four digits of the national ID is displayed.
View Withholding Form	Select to view the selected PDF form in new browser window or tab.

(USA) 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 Fluid Employee Self-Service. 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: Video Feature Overview: PeopleSoft Online Withholding Forms

Video: PeopleSoft HCM 9.2 Image 18 Highlights: Updateable PDF for W4

Note: Updateable PDF tax forms are not available in tablets or smartphones.

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 tax withholding updates.
Tax Withholding Page	PY_W4_MAIN_FL	View a list of your tax withholding information and access a tax withholding form 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.
Pending Approvals - W-4 Tax Withholding Form 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 updateable PDF form and then selects the **Submit** button in the PDF file.

8. The system prompts the employee to enter their 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 approval request to the approver on the Pending Approvals - W-4 Tax Withholding Form Page. It sends the employee an additional email after the request is approval.

Tax Withholding Form Access During PreBoarding

Future hires or rehires can update their tax withholding information on the Tax Withholding Page as configured, if the option is enabled in the **Future Hire Self Service Access** section of the "Payroll for NA Installation Page" (PeopleSoft Payroll for North America). Future hires can access the Tax Withholding page using the "OnBoarding Activities Tile (for Employees)" (PeopleSoft Human Resources Administer Workforce) prior to their hire date, if the step is added to the activity guide template that is used to support the PreBoarding phase of the OnBoarding process.

Note that:

- When a future hire or rehire submits a tax withholding form in Employee Self-Service, tax data is updated in the employee tax data row that has the hire or rehire date as the effective date. This row was inserted by the system automatically if the **Automatic Employee Tax Data** option was selected on the Product Specific page.
- If an employee (whose federal form version is W-4 2020 or later) is rehired into the same company and tax location code, the system (with the **Automatic Employee Tax Data** option selected) does not create a new row for rehire. In this case, when a tax withholding form is submitted in Employee Self-Service, tax data is inserted with the rehire date as the effective date into employee tax data tables.
- If an active employee has a future job with another company in a different employee record, and the **Tax Withholding** option is enabled on Payroll for NA Installation page, the employee can access and update the tax withholding information for both the current and future jobs in Employe Self-Service.

- If an active employee has a future job with the same company in a different employee record, the employee is not considered future hire as they are currently active in the same company.
- If an active employee has future jobs with different companies, the employee can access and update the tax withholding information for each of the companies in Employe Self-Service.

Important! When the hire or rehire date is changed for an employee on job, it is usually done in correction mode and such change will not be reflected automatically in employee tax data tables even when the **Automatic Employee Tax Data** option is selected. The administrator should manually update employee tax data tables for changes pertaining to the hire or rehire date, which impacts the PreBoarding functionality.

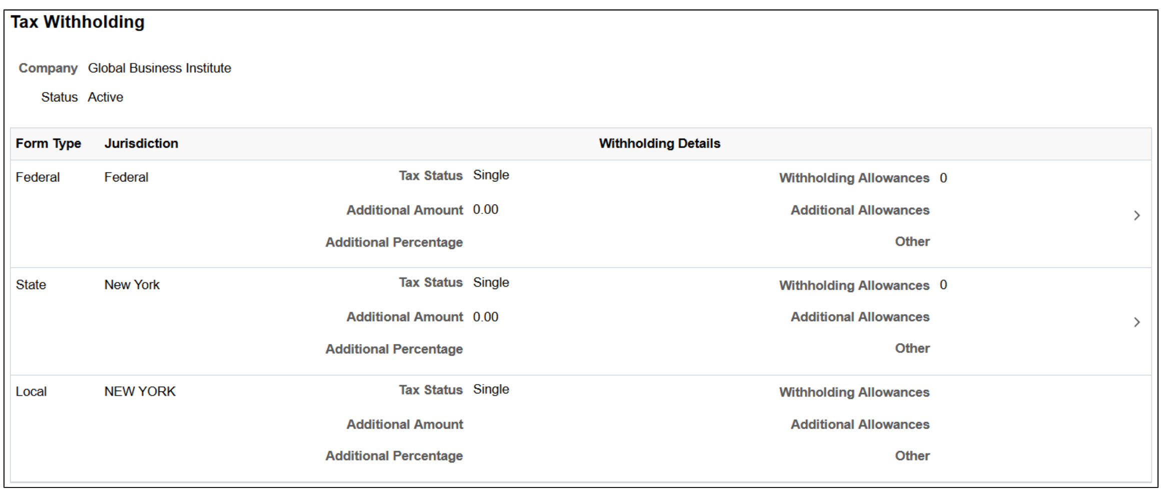
Tax Withholding Page

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

Navigation:

- Click the Tax Withholding tile from the Payroll Dashboard.
- Click **Tax Withholding** from the Fluid Navigation Collection for Payroll.

This example illustrates the Tax Withholding page for USA.



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.

A chevron appears in rows where updateable PDF tax forms are available.

When the employee has submitted a tax withholding change request and the request is in pending approval, selecting the row displays a modal page that shows the current withholding details and the values that were changed (with a color indicator) in the submitted request.

For more information about the setup of the Tax Withholding page, see Setting Up Updateable PDF Tax Forms.

Note: Payees in 1099-R companies are not allowed to update their Federal Tax Data on the Tax Withholding page.

Federal Tax Withholding Forms Page

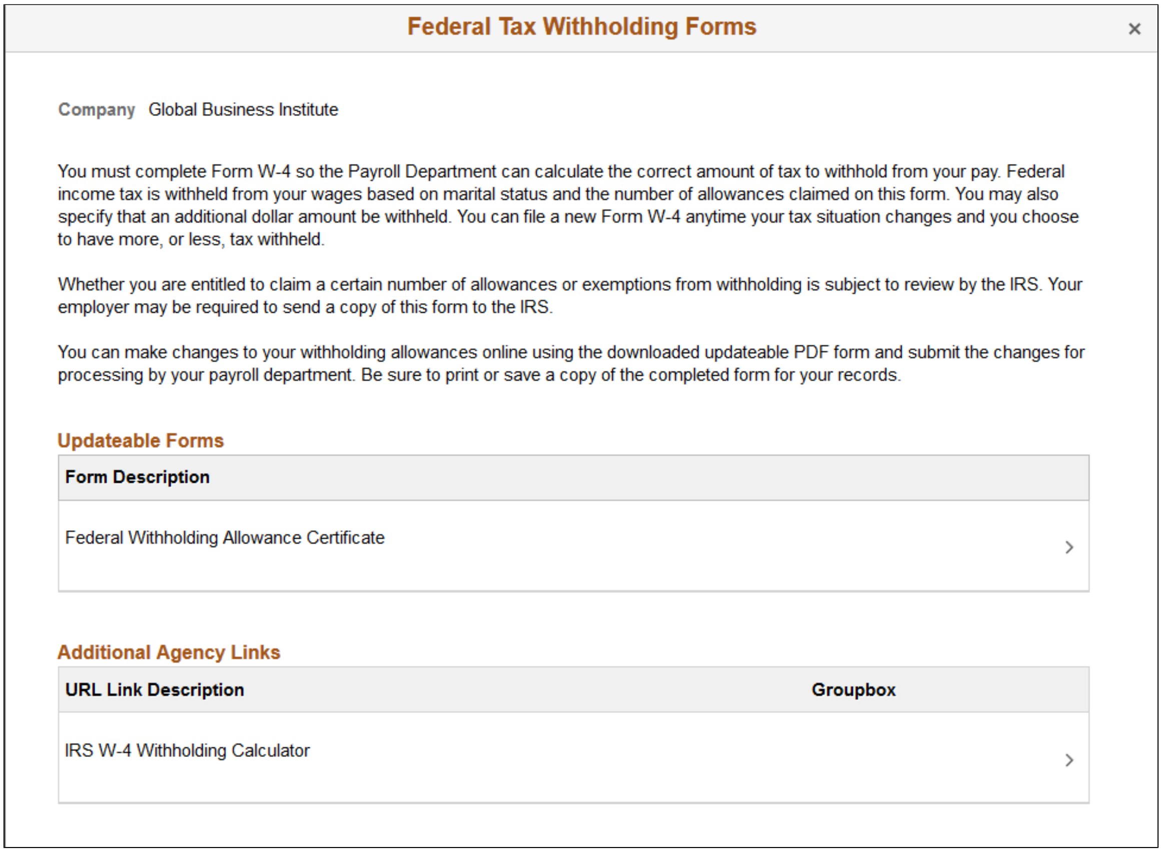
Use the Federal Tax Withholding Forms page (PY_W4_MAIN_FED_SCF) to view a list of updateable federal tax forms and additional agency links, if any, and access the form or URL.

Navigation:

Click the Federal row with a chevron 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 a chevron on the Tax Withholding page.

This example illustrates the Federal Tax Withholding Forms page for USA.



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.

Field or Control	***Description***
Updateable Forms	If a chevron 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" (Application Fundamentals) in your *PeopleSoft HCM Applications Fundamentals* product documentation.

State Tax Withholding Forms Page

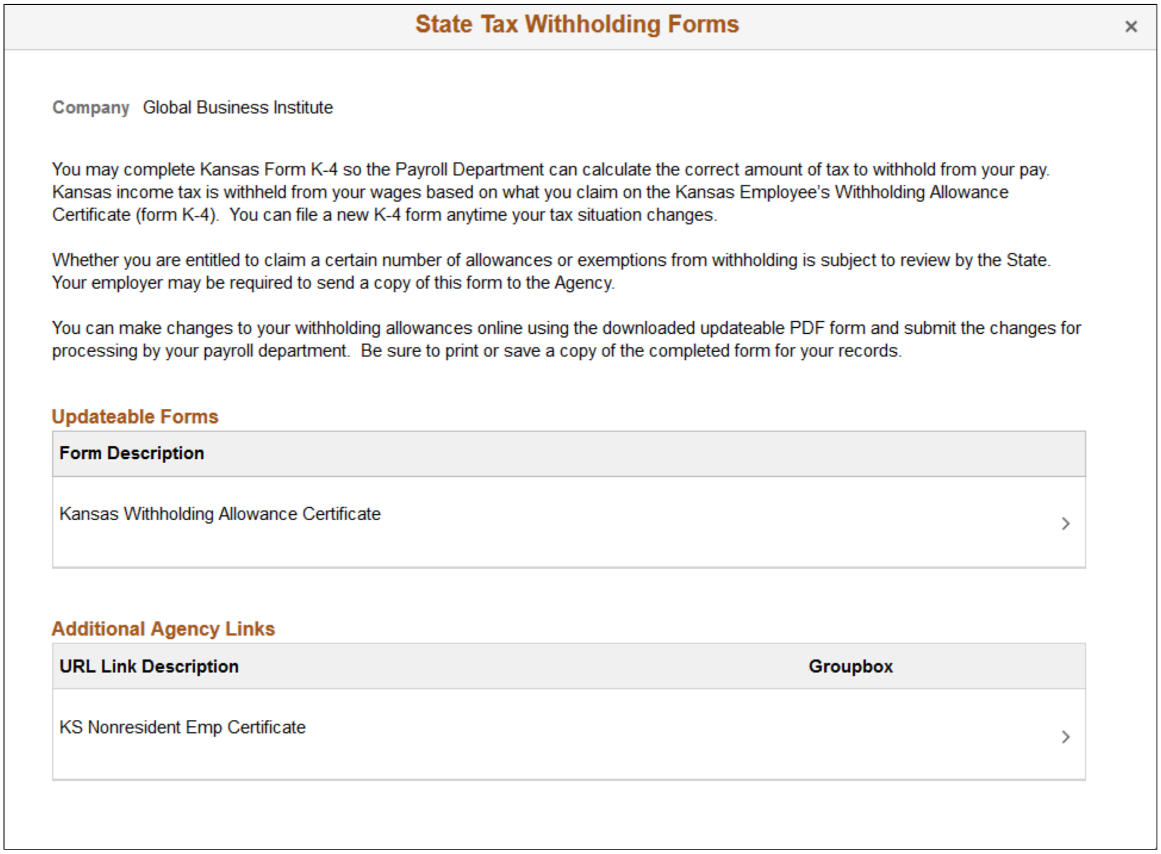
Use the State Tax Withholding Forms page (PY_W4_MAIN_ST_SCF) to view a list of updateable state tax forms and additional agency links, if any, and access the form or URL.

Navigation:

Click the State row with a chevron 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 the chevron on the Tax Withholding 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" (Application Fundamentals) in your *PeopleSoft HCM Applications Fundamentals* product documentation.

Field or Control	***Description***
Updateable Forms	If a chevron 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.

Field or Control	Description
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.

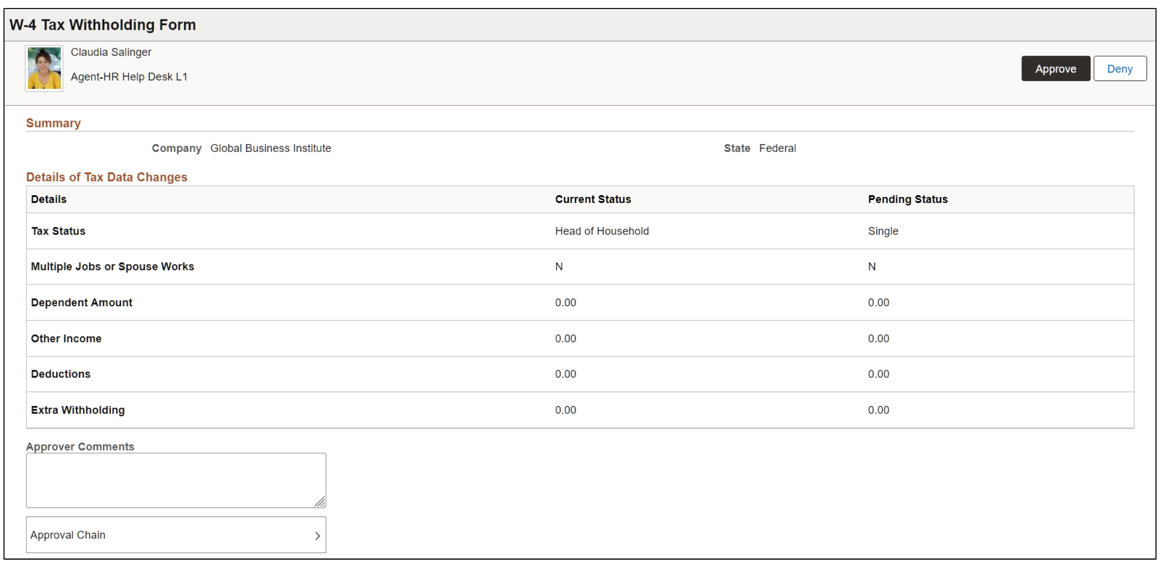
Pending Approvals - W-4 Tax Withholding Form Page

Use the Pending Approvals - W-4 Tax Withholding From page (EOAWMA_TXNHDTL_FL) to approve tax withholding changes that employees submitted using Employee Self-Service.

Navigation:

- On the Manager Self-Service home page, select the **Approvals** tile to access the Pending Approvals page. Then select a W-4 Tax Withholding Form entry on the Pending Approvals page.
- Select the push notification (or the link from an email notification) of a tax withholding change, if notifications are enabled in the setup.

(Desktop) This example illustrates the Pending Approvals - W-4 Tax Withholding Form page.



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” (Application Fundamentals).

Field or Control	Description
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.

Field or Control	Description
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 employee updated 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.

(CAN) Using the PeopleSoft Fluid User Interface to Update PDF Tax Forms

Oracle's PeopleSoft updateable PDF tax forms functionality enables Canadian employees to update their federal and provincial tax withholding information using Fluid Employee Self-Service. For an overview of this process, see Understanding Updateable PDF Tax Forms.

Note: Updateable PDF tax forms are not available in tablets or smartphones.

The following video provides an overview of the updateable Canadian federal tax withholding form:

Video: Image Highlights, PeopleSoft HCM Update Image 46: Employee Self-Service Canadian Federal TD1

Video: Image Highlights, PeopleSoft HCM Update Image 47: Canadian Provincial Online Withholding PDF Forms

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 tax withholding updates.

Page Name	Definition Name	Usage
Tax Withholding Page	PY_TD1_MAIN_FL	View your tax withholding information and access the tax withholding forms for the federal and provincial jurisdictions.
Federal Tax Withholding Forms Page	PY_TD1_MAIN_FD_SCF	Update federal tax withholding forms, and view additional agency links (if any) as well as submitted form updates.
Provincial Tax Withholding Forms Page	PY_TD1_MAIN_ST_SCF	Update provincial tax withholding forms, and view additional agency links (if any) as well as submitted form updates.
Pending Approvals - TD1 Tax Withholding Form 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 details.
2. The employee selects a jurisdiction to update.

   Depending on the selected jurisdiction, either the Federal Tax Withholding Forms Page or the Provincial 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 updateable PDF form and then selects the **Submit** button in the PDF file.
8. The system prompts the employee to enter their 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.

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 to include or exclude a copy of the withholding form.

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 approval request to the approver on the Pending Approvals - TD1 Tax Withholding Form Page. It sends the employee an additional email after the request is approved.

Tax Withholding Form Access During PreBoarding

Future hires or rehires can update their tax withholding information on the Tax Withholding Page as configured, if the option is enabled in the **Future Hire Self Service Access** section of the "Payroll for NA Installation Page" (PeopleSoft Payroll for North America). Future hires can access the Tax Withholding page using the "OnBoarding Activities Tile (for Employees)" (PeopleSoft Human Resources Administer Workforce) prior to their hire date, if the step is added to the activity guide template that is used to support the PreBoarding phase of the OnBoarding process.

Note that:

- When a future hire or rehire submits a tax withholding form in Employee Self-Service, tax data is updated in the employee tax data row that has the hire or rehire date as the effective date. This row was inserted by the system automatically if the **Automatic Employee Tax Data** option was selected on the Product Specific page.
- If an active employee has a future job with another company in a different employee record, and the **Tax Withholding** option is enabled on Payroll for NA Installation page, the employee can access and update the tax withholding information for both the current and future jobs in Employe Self-Service.
- If an active employee has a future job with the same company in a different employee record, the employee is not considered future hire as they are currently active in the same company.
- If an active employee has future jobs with different companies, the employee can access and update the tax withholding information for each of the companies in Employe Self-Service.

Important! When the hire or rehire date is changed for an employee on job, it is usually done in correction mode and such change will not be reflected automatically in employee tax data tables even when the **Automatic Employee Tax Data** option is selected. The administrator should manually update employee tax data tables for changes pertaining to the hire or rehire date, which impacts the PreBoarding functionality.

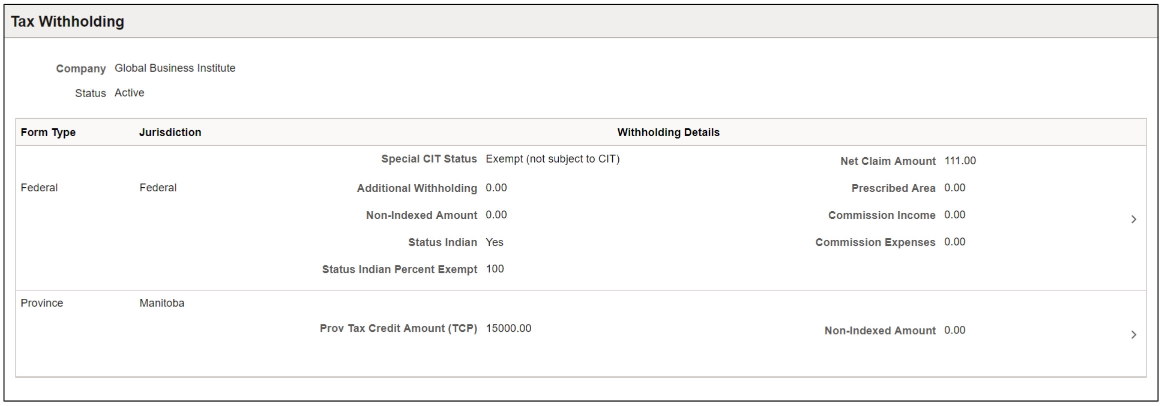
Tax Withholding Page

Use the Tax Withholding page (PY_TD1_MAIN_FL) to view your tax withholding information and access the tax withholding forms for the federal and provincial jurisdictions.

Navigation:

- Select the Tax Withholding Canada tile from the Payroll Dashboard.
- Select **Tax Withholding Canada** from the Fluid Navigation Collection for Payroll.

This example illustrates the Tax Withholding page for Canada.



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

The presence of TD1 tax withholding forms determines the display of some tax withholding information. For example, if Form TD1X is set to *Inactive* in the setup, the **Income** and **Expense** fields are not displayed. Similarly, if Form TD1-IN is set to *Inactive,* the **Status Indian** and **Percent Exempt** fields are not displayed.

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.

Each employee can be associated with only one province at any given time. To determine the correct provincial form to display for the employee, the system uses the current province that is specified on the "Provincial Income Tax Data Page" (PeopleSoft Payroll for North America). To make sure that the correct form and provincial income tax data are displayed, employee data must be set up accurately on the Provincial Income Tax Data page.

(Quebec) If the employee has a tax distribution setup for *Quebec* on the "Update Tax Distribution Page" (PeopleSoft Payroll for North America), tax withholding forms for Quebec are displayed. Two forms are delivered: one is the source deductions return form that is applicable to all employees in Quebec; the other is a separate form for commissioned employees (which can be inactivated in the setup as needed).

While most provincial tax withholding forms display the same list of fields on this page, there are exceptions. For example, an additional field **Dependant Claim Amount (Y)** is shown on the rows for *British Columbia* and *Ontario*. A different, longer list of fields are displayed for *Quebec.*

A chevron appears in rows where updateable PDF tax forms are available.

When the employee has submitted a tax withholding change request and the request is in pending approval, selecting the row displays a modal page that shows the current withholding details and the values that were changed (with a color indicator) in the submitted request.

For more information about the setup of the Tax Withholding page, see Setting Up Updateable PDF Tax Forms.

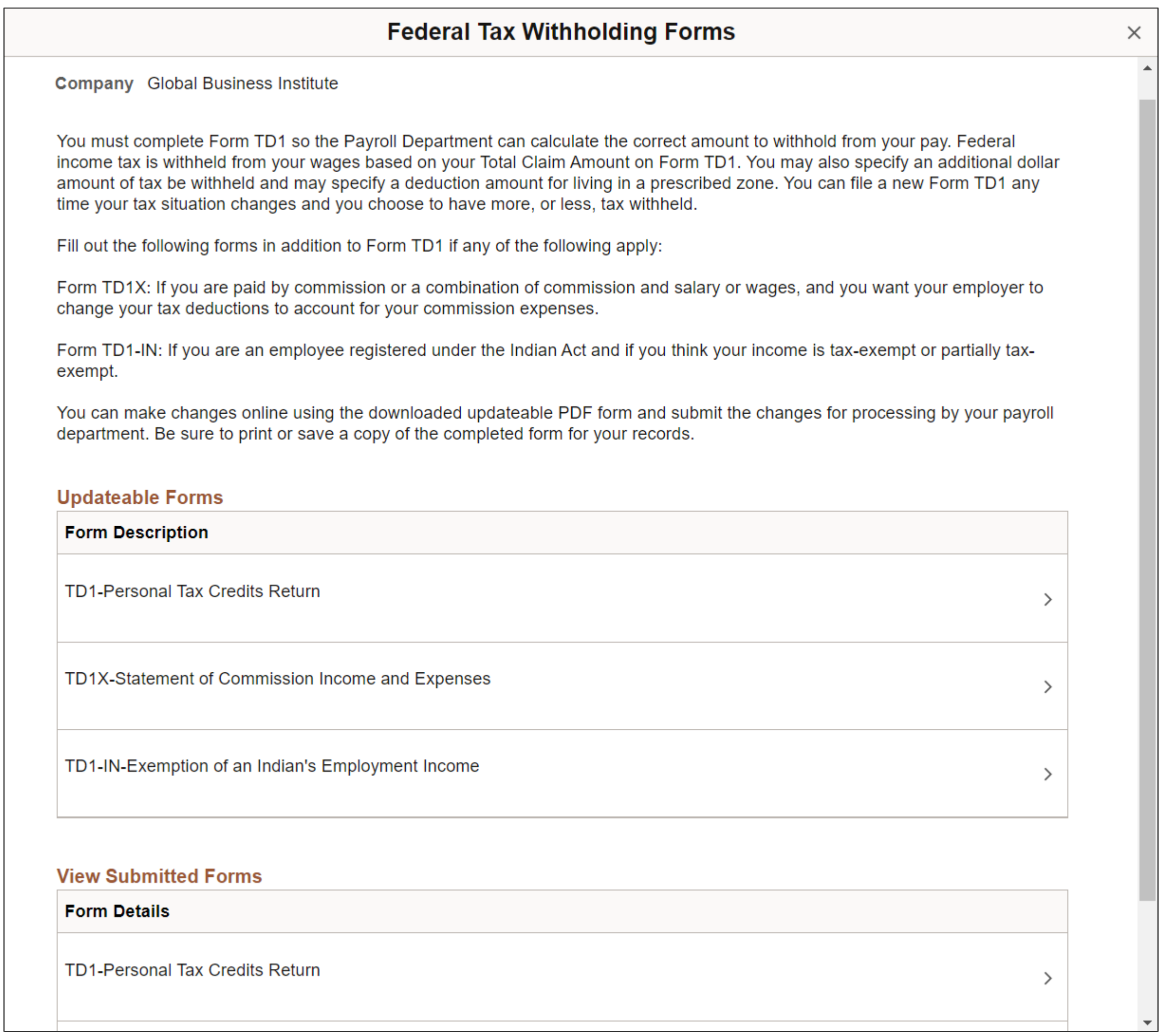
Federal Tax Withholding Forms Page

Use the Federal Tax Withholding Forms page (PY_TD1_MAIN_FD_SCF) to update federal tax withholding forms, and view additional agency links (if any) as well as submitted form updates.

Navigation:

Click the Federal row with a chevron on the Tax Withholding page.

This example illustrates the Federal Tax Withholding Forms page for Canada.



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

For more information about the setup of the Federal Tax Withholding Forms page, see Tax Jurisdiction Mapping Page.

Updateable Forms

If a chevron appears in a row in this section, then an updateable PDF tax form is available. Select the row to access and update the tax withholding 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.

View Submitted Forms

This section lists the updated PDF tax forms that you have submitted.

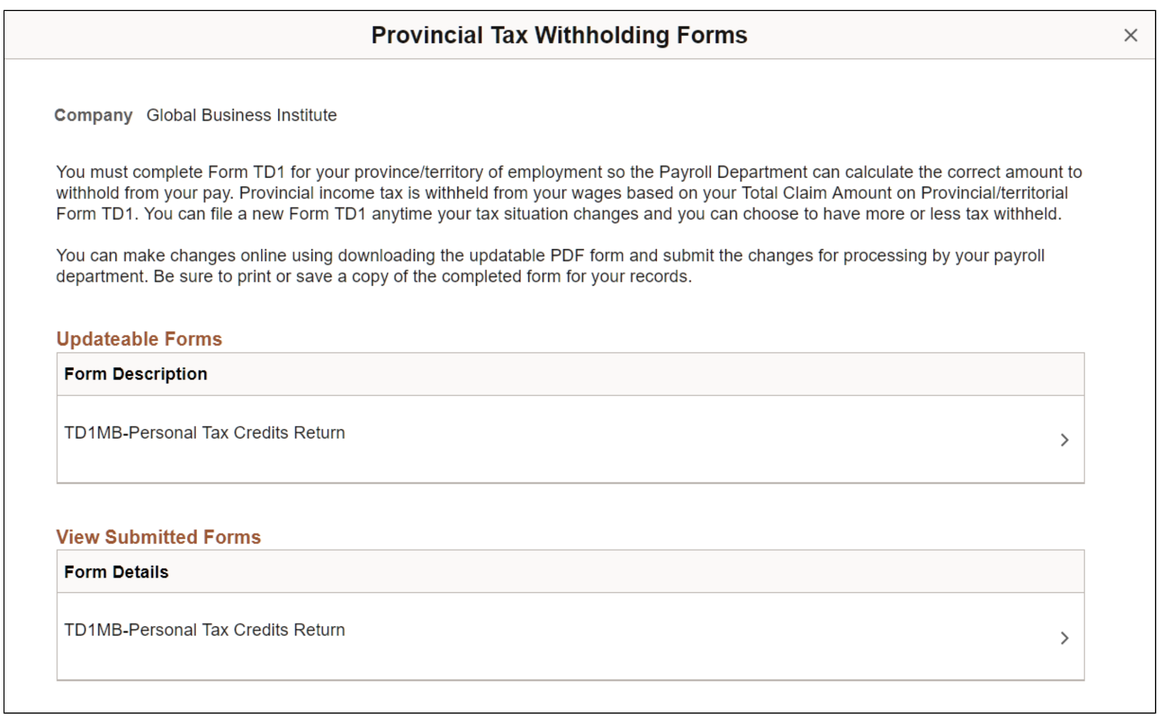
Provincial Tax Withholding Forms Page

Use the Provincial Tax Withholding Forms page (PY_TD1_MAIN_ST_SCF) to update provincial tax withholding forms, and view additional agency links (if any) as well as submitted form updates.

Navigation:

Click a Province row with a chevron on the Tax Withholding page.

This example illustrates the Provincial Tax Withholding Forms page for Canada.



Payroll Administrators can configure and control text that appears on the Provincial Tax Withholding Forms page to meet your organization's needs.

For more information about the setup of the Provincial Tax Withholding Forms page, see Tax Jurisdiction Mapping Page.

Updateable Forms

If a chevron appears in a row in this section, then an updateable PDF tax form is available. Select the row to access and update the tax withholding 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.

View Submitted Forms

This section lists the updated PDF tax forms that you have submitted.

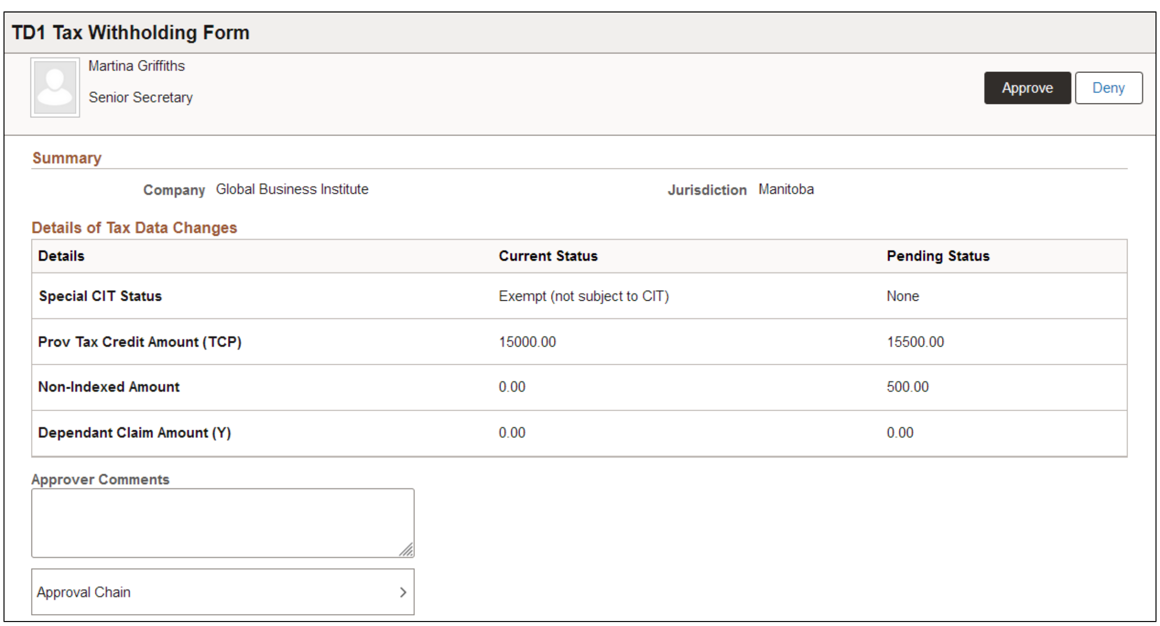
Pending Approvals - TD1 Tax Withholding Form Page

Payroll administrators use the Pending Approvals - TD1 Tax Withholding From page (EOAWMA_TXNHDTL_FL) to approve tax withholding changes that employees submitted using Employee Self-Service.

Navigation:

- On the Manager Self-Service home page, select the **Approvals** tile to access the Pending Approvals page. Then select a *TD1 Tax Withholding Form* entry on the Pending Approvals page.
- Select the push notification (or the link from an email notification) of a tax withholding change, if notifications are enabled in the setup.

This example illustrates the Pending Approvals - TD1 Tax Withholding Form page.



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” (Application Fundamentals).

Field or Control	***Description***
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 employee updated 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.

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.

Page Name	***Definition Name***	***Usage***
Year End Form Options Page Year End 1099-R Form Options Page	PY_YE_OPTION_CAN PY_YE_OPTION_USA PY_YE_OPTION_1099R	(USA and CAN) Enable self-service year-end forms or slips. (1099-R) Enable self-service Form 1099-R. 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.
T4/T4A Consent Form Page RL-1/RL-2 Consent Page W-2/W-2c Consent Page 1042-S Consent Page 1099-R Consent Page	(varies)	Employees provide or withdraw consent to receive electronic year-end slips or forms. **Note:** Employees can also provide or withdraw consent to share data with tax preparation software providers on the W-2/W-2c Consent page. 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 <CAN Form> Consent Status Page	PY_FORM_STAT_CAN PY_FORM_STAT_MRQ	Monitor employee consent status. Review the history of each employee's consent and email notification status.
Review <USA Form> Consent Status Page	PY_FORM_STAT_USA PY_FORM_STAT_NRA PY_FORM_STAT_1099R	Monitor employee consent status. Review the history of each employee's consent and email notification status.

Page Name	*Definition Name*	*Usage*
Review W-2 Export Consent Page	PY_FORM_STAT_EXP	Monitor employee tax data export consent status. Review the history of each employee's tax data export consent and email notification status.
(CAN) 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 consent types, dates and status codes that you specify in the report request parameters.
(USA) 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 tax forms, dates and status codes that you specify in the report request parameters.
(USA) Export Consent Status Report	RUNCTL_TAX901CS	Run the TAX901CS report, which lists employees' most current tax data export consent status based on dates and status codes that you specify in the report request parameters.
Reset <CAN Form> Consent Status Page	PY_RC_RESCON_CAN PY_RC_RESCON_MRQ	Reset the consent status for a list of selected employees. Enter run parameters for the Reset Form Consent Application Engine process (PYYE_ RESCAN).
Reset <USA Form> Consent Status Page	PY_RC_RESCON_USA PY_RC_RESCON_NRA PY_RC_RESCON_1099R	Reset the consent status for a list of selected employees. Enter run parameters for the Reset Form Consent Application Engine process (PYYE_ RESUSA).
View Employee List Page	PY_GB_EMPL_LST	View the list of employees who are part of the specified group ID and are included in the consent reset process.
Reset Export Consent Status Page	PY_RC_RSEXPCON_USA	Reset the tax data export consent status for a list of selected employees. Enter run parameters for the Reset Export Consent Application Engine process (PYYE_RESEXP).

Understanding Employee Consent for Electronic Year-End Forms

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

Video: Image Highlights, PeopleSoft HCM Update Image 32: PNA Year End Employee Consent Reset

Consent for USA Year-End Forms

In 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.

U.S. 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 copies.

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

Forms	***Consent Status***	***Form Availability***
W-2/W-2c, 1042-S, and 1099-R	*Consented*	The PDF year-end form creation process suppresses the printing of the employee's paper form. The employee views and prints 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.
W-2/W-2c, 1042-S, and 1099-R	*No Consent Received* *Withdrawn* *Reset by Employer*	The PDF year-end form creation process prints the employee's paper form. The employee can also view and print the year-end form through self-service.

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 form for 2022 and beyond does not require employee consent to be viewed and printed through self-service.

- The T4A form prior to 2022 requires 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 RL-2 form requires employee consent to be viewed and printed through self-service. If no consent is provided, the form 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, T4A and RL-1 slips for any year	*Consented*	The PDF year-end form creation process suppresses the printing of the employee's paper T4, T4A or RL-1. The employee views and prints the year-end slip through self-service.
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 slip for 2022 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.
T4A slip for 2021 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.
RL-2 slip 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.

Forms and Year	***Consent Status***	***Form Availability***
RL-2 slip 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 payroll administrators to reset the consent status for all employees, or a list of employees identified by the selected method. After the reset process is run, impacted employees will receive year-end forms in paper.

  For example, use this process to reset the consent status of terminated employees that are identified by a group ID to ensure the printing of paper year-end forms.
- PDF year-end form 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.

Consent and Form Notification

The system supports the delivery of notifications to employees when:

- Consent to receive electronic form is granted by the employee.
- Consent to receive electronic form is withdrawn by the employee.
- Consent is reset by the administrator.
- Tax form is available for viewing (when the **Availability Notification** button is selected on the Year End Form Options Page.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

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. Select the *Payroll for North America* tab to access tax updates and other information delivered for each update image.

Related Links

Reset <USA Form> Consent Status Page
Reset <CAN Form> Consent Status Page
Delivered Workflows for ePay

Understanding Employee Consent for Tax Data Export

This topic discusses employee consent for sharing their tax data with tax preparation software providers.

In Payroll for North America, payroll administrators can run the Create W-2 Import File process (TAX960TI) to create files with W-2 or W-2c data for employees, and send them to tax preparation software providers for tax filing purposes. By default, all employees are included. The system delivers configuration options to provide employees the option to decide if they want to share their tax data through consent.

When the **Display Third-Party Data Sharing Consent in Self Service** option is enabled on the “Payroll for NA Installation Page” (PeopleSoft Payroll for North America), employees can withdraw or give their consent to share their tax data on the W-2/W-2c Consent Page in Employee Self-Service. For employees who have withdrawn their consent, the TAX960TI process excludes their W-2 or W-2c data from the import files created, therefore the data will not be shared with any tax preparation software provider.

Note: The default consent status for employees is *Consent Set/Reset by Employer to Include in Import File.*
For hires and rehires, the default consent status is determined by the **Exclude W-2 from Export File** option on the Payroll for NA Installation page. If cleared, the default consent status is *Consent Set/Reset by Employer to Include in Import File.* If selected, the default consent status becomes *Consent Set/Reset by Employer to Exclude from Import File.*

Administrators can update the consent status of employees in bulk using the reset process on the Reset Export Consent Status Page. They can choose to exclude the W-2 or W-2c data of identified employees from the import files, or include the data in the files.

Similar to managing consent for year-end forms, administrators have the options to review the consent statuses of employees individually on an online page, or collectively in a report that is generated by the TAX901CS program.

Consent Notification

The system triggers the delivery of notifications (with Notification Composer enabled) to employees when one of these consent changes occurs:

- Consent to share W2/W-2c data with tax preparation software provider is granted by the employee.
- Consent to share W2/W-2c data with tax preparation software provider is withdrawn by the employee.
- Consent is reset by the administrator to include employee W2/W-2c data in import files.
- Consent is reset by the administrator to exclude employee W2/W-2c data from import files.

After a consent notification is sent successfully, the administrator can view the updated data export consent status and notification status of the employee on the Review W-2 Export Consent Page.

Related Links

“Creating W-2 Import Files” (PeopleSoft Payroll for North America)
“Understanding Notification Composer” (Enterprise Components)

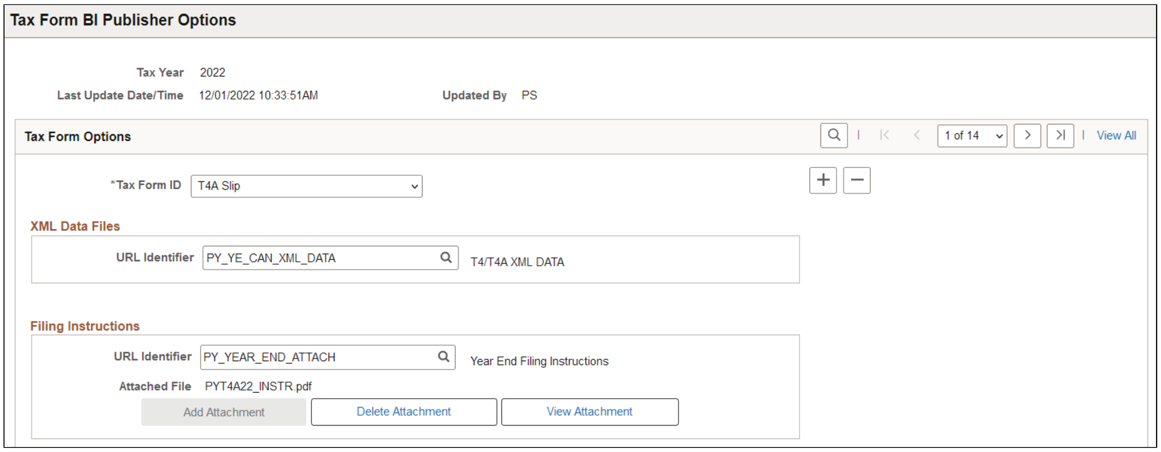
Tax Form BI Publisher Options Page

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.

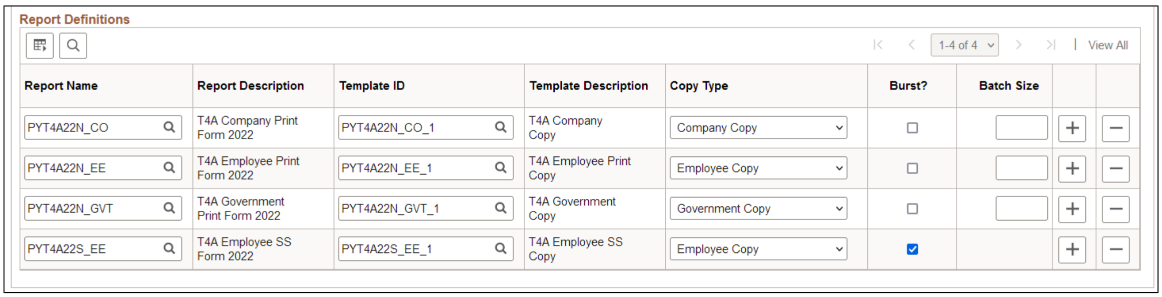
Navigation:

- (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**

This example illustrates the fields and controls on the Tax Form BI Publisher Options page (1 of 2).



This example illustrates the fields and controls on the Tax Form BI Publisher Options page (2 of 2).



Field or Control	***Description***
Tax Form ID	Select a form to be configured for printing in the BI Publisher PDF format.

XML Data Files

Field or Control	***Description***
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.

Filing Instructions

Field or Control	***Description***
URL Identifier	Enter the location where the filing instructions are stored.

Field or Control	*Description*
Attached File	This file contains the filing instructions to be viewed for the selected form in Self-Service.

Report Definitions

Field or Control	*Description*
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.
Template ID	The template ID is used in conjunction with report name; each report name has a corresponding template ID.
Copy Type	Different copy types are supported: *Company Copy* *Employee Copy* *Government Copy* (For 1099-R) *Payee Copy* (For 1099-R) *Payer Copy*
Burst?	Select this checkbox to burst each year end form in order to allow forms to be viewed in Self-Service. If this checkbox is not selected, then it will not be possible to view the forms in Self-Service.
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. The default is blank, meaning that forms for all employees will be generated in one PDF file.

See year-end processing instructions issued with the tax update posted on My Oracle Support (Payroll for North America Tax Update Documentation, Doc ID: 2820620.2) in October of each year.

Year End Form Options Page

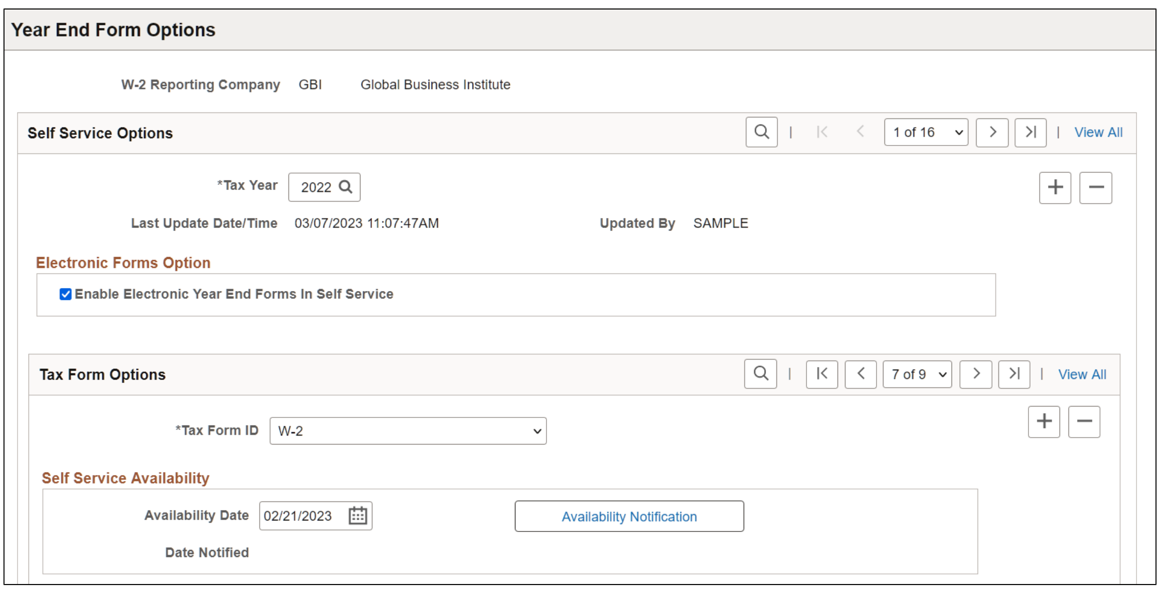
Use the Year End Form Options page (PY_YE_OPTION_CAN or PY_YE_OPTION_USA) to enable self-service year-end forms or slips, and Year End 1099-R Form Options page (PY_YE_OPTION_1099R) to enable self-service Form 1099-R. This step is required to enable employees to submit and withdraw consent to receive electronic forms. Also specify the availability date for each form and tax year.

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

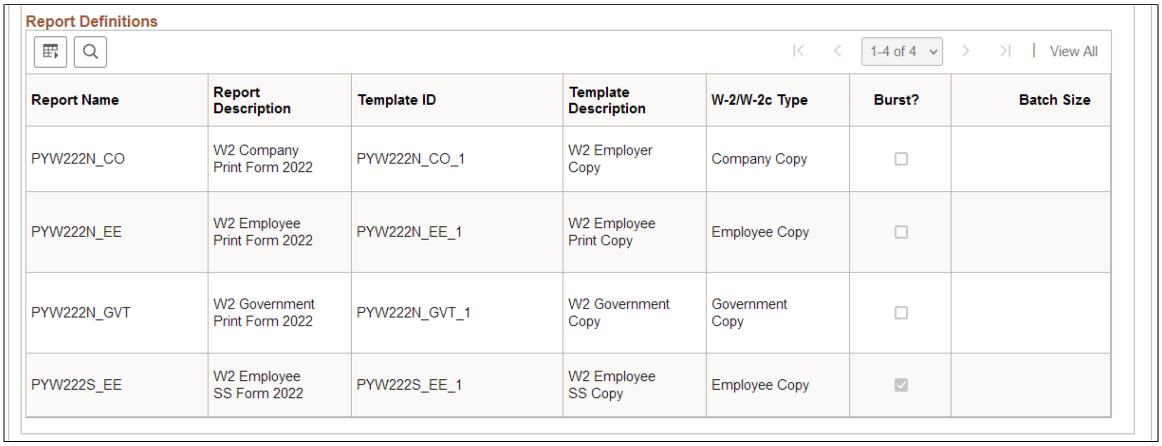
Navigation:

- (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**
- (1099-R) **Payroll for North America** > **U.S. Annual Processing** > **Define Annual Tax Reporting** > **Year End 1099-R Form Options** > **Year End 1099-R Form Options**

This example illustrates the fields and controls on the Year End Form Options page (1 of 2).



This example illustrates the fields and controls on the Year End Form Options page (2 of 2).


Report Definitions

1-4 of 4 View All

Report Name	Report Description	Template ID	Template Description	W-2/W-2c Type	Burst?	Batch Size
PYW222N_CO	W2 Company Print Form 2022	PYW222N_CO_1	W2 Employer Copy	Company Copy	☐	
PYW222N_EE	W2 Employee Print Form 2022	PYW222N_EE_1	W2 Employee Print Copy	Employee Copy	☐	
PYW222N_GVT	W2 Government Print Form 2022	PYW222N_GVT_1	W2 Government Copy	Government Copy	☐	
PYW222S_EE	W2 Employee SS Form 2022	PYW222S_EE_1	W2 Employee SS Copy	Employee Copy	☑	

The Year End Form Options page configures the 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.

The Year End 1099-R Form Options page is used for the setup for Form 1099-R.

Field or Control	***Description***
Tax Year	Select a year. Create a new row each tax year.

Electronic Forms Option

Field or Control	***Description***
(CAN) **Enable Electronic <Slip Name> Slips In Self Service** (USA) **Enable Electronic Year End Forms in Self Service**	Select the applicable check boxes to enable the listed company to provide the PDF forms or slips (specified in the **Tax Form ID** field) in Self-Service. 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 Consent Status process on the Reset <CAN Form> Consent Status Page or Reset <USA Form> Consent Status Page.

Tax Form Options

Field or Control	*Description*
Tax Form ID	Enter all valid tax form IDs for the listed company. **Note:** This field displays *1099-R* on the Year End 1099-R Form Options page.

Self Service Availability

Field or Control	*Description*
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 email notification text on the Year End Form Text Page. **Note:** Before you select this button, verify that the availability date for the notification is correct.
Date Notified	Displays the current date after you select the **Availability Notification** button to trigger the workflow email notification.

Report Definitions

This section displays a list of valid report definitions based on the tax year and tax form ID entered. This is for information only. This information comes from the Tax Form BI Publisher Options Page.

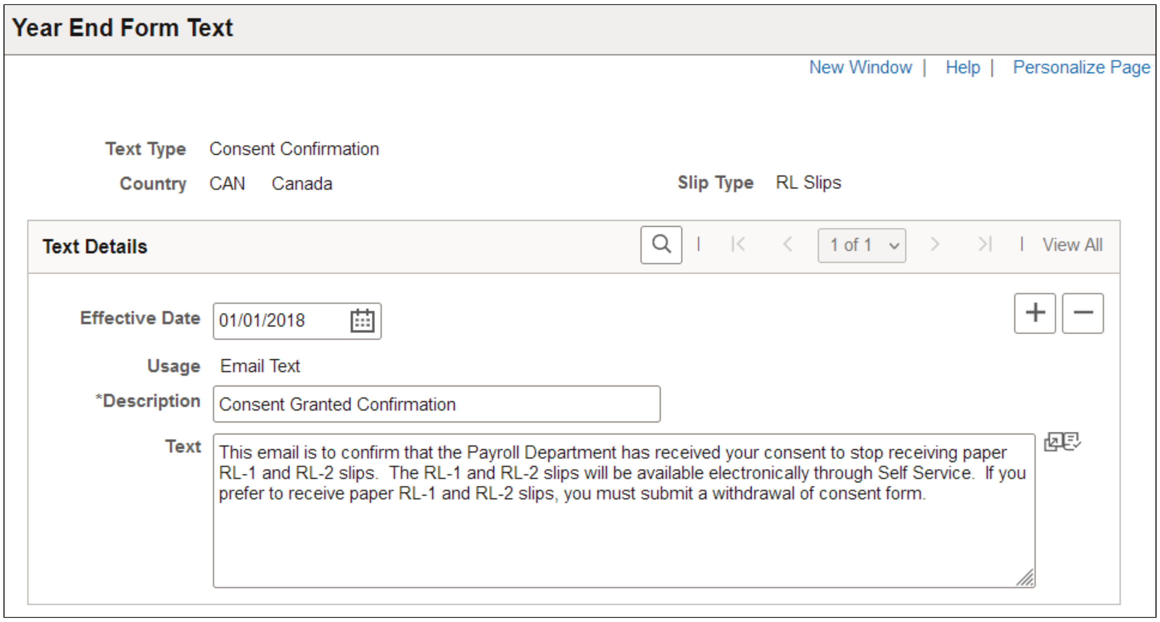
Year End Form Text Page

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**

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 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.
Consent Instructions	Instructional text displayed on the consent page of the specified form or slip to request consent.
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.
Correction Available	Notification to employees that the amened version of the specified form or slip is available for viewing and printing in self-service. Workflow issues this email when the payroll administrator selects the **Availability Notification** button on the Year End Form Options page.

Text Type	***Description***
Form Available	Notification to employees that the specified form or slip is available for viewing and printing in self-service. Workflow issues this email when the payroll administrator selects the **Availability Notification** button on the Year End Form Options page.
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.
Withdrawal Instructions	Instructional text displayed on the consent page of the specified form or slip to withdraw consent.

Additional Page Elements

Field or Control	***Description***
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 used in U.S. forms and Canada slips. 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.

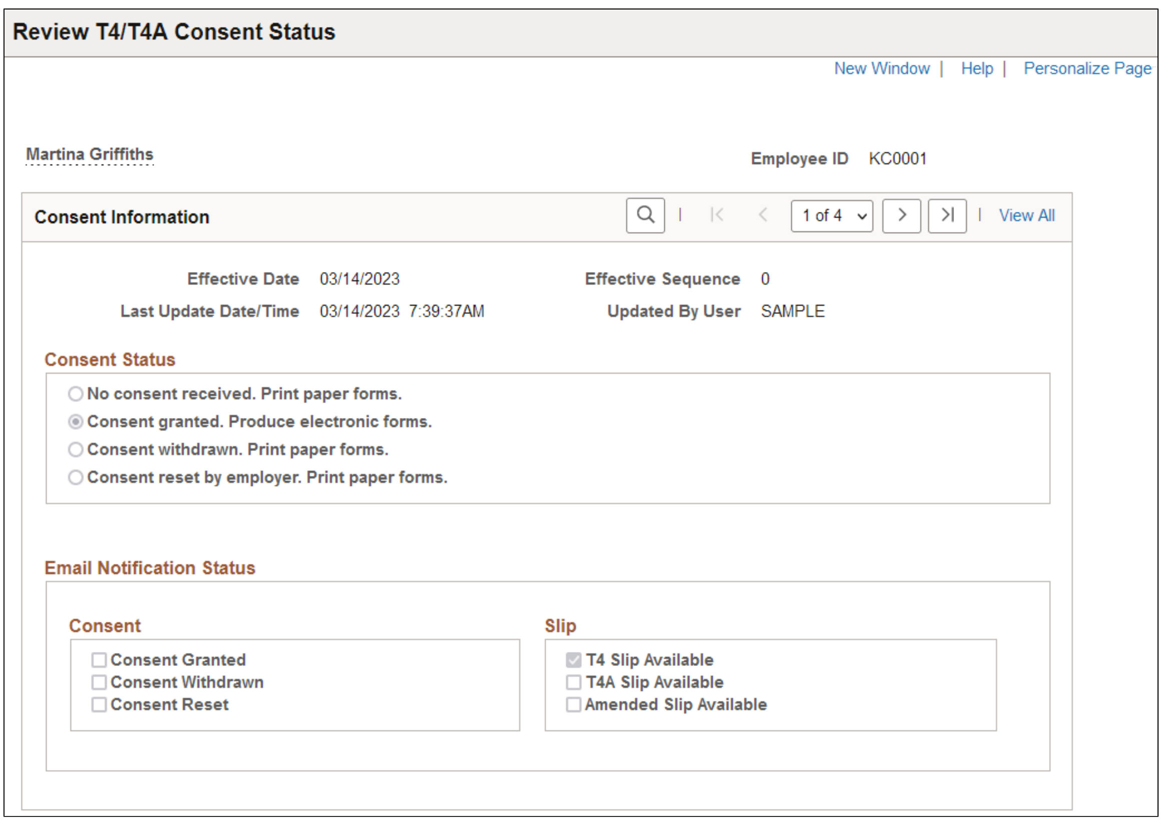
Review <CAN Form> Consent Status Page

Use the Review T4/T4A Consent Status page (PY_FORM_STAT_CAN) or Review RL1/RL2 Consent Status page (PY_FORM_STAT_MRQ) as appropriate to review employees' tax form consent and email notification statuses.

Navigation:

- (T4/T4A) **Payroll for North America** > **Year-End Processing CAN** > **Year-End/New Year Preparation** > **Review T4/T4A Consent Status** > **Review T4/T4A Consent Status**
- (RL-1/RL-2) **Payroll for North America** > **Year-End Processing CAN** > **Year-End/New Year Preparation** > **Review RL1/RL2 Consent Status** > **Review RL1/RL2 Consent Status** > **Review RL-1/RL-2 Consent Status**

This example illustrates the fields and controls on the Review T4/T4A Consent Status page.



Note: The Review T4/T4A Consent Status page and Review RL1/RL2 Consent Status page are almost identical except for the page title and the list of supported slips.

Field or Control	Description
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 or slip availability.

Note: As a payroll administrator, you can also generate the Electronic Year End Form Consent Change report (report ID: CTX900CS) to view a list of employees with the specified consent status values within a specified date range.

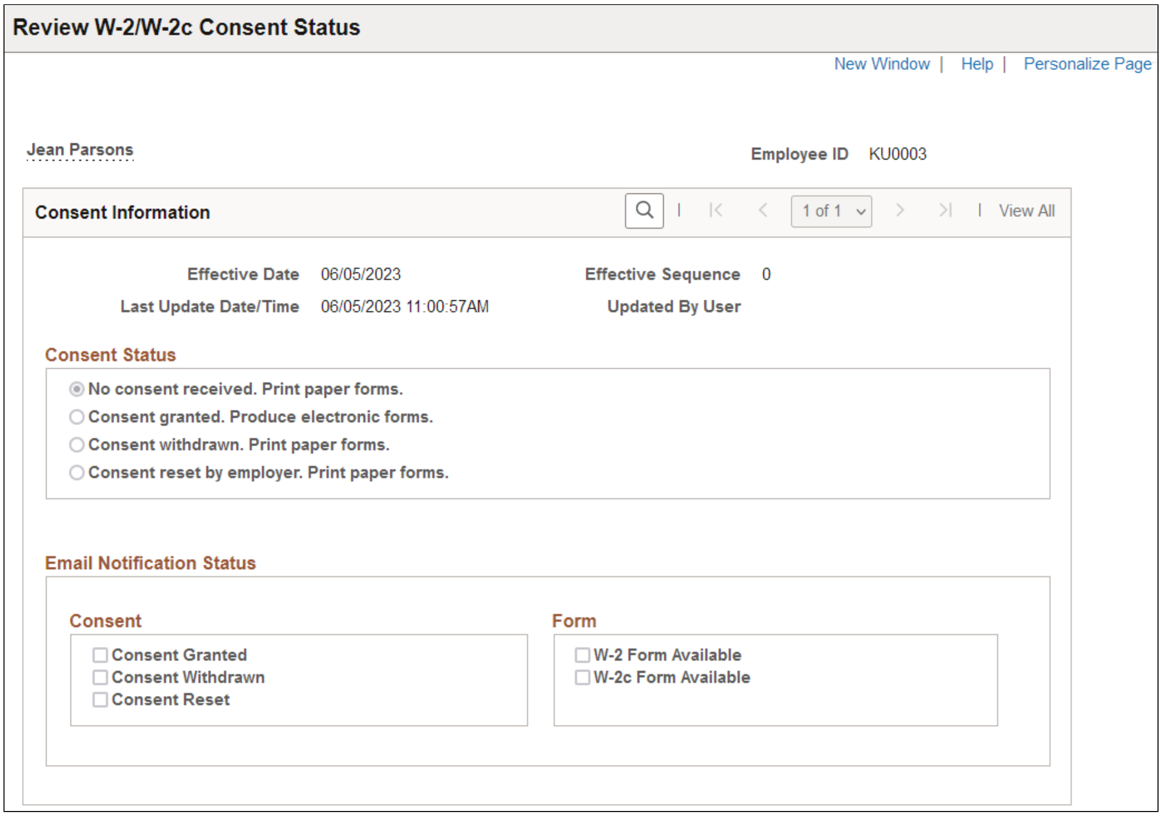
Review <USA Form> Consent Status Page

Use the Review W-2/W-2c Consent Status page (PY_FORM_STAT_USA), Review 1042-S Consent Status page (PY_FORM_STAT_NRA), or Review 1099-R Consent Status page (PY_FORM_STAT_1099R) as appropriate to review employees' tax form consent and email notification statuses.

Navigation:

- (W-2/W-2c) **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**
- (1042-S) **Payroll for North America** > **U.S. Annual Processing** > **1042-S Reporting** > **Review 1042-S Consent Status** > **Review 1042-S Consent Status**
- (1099-R) **Payroll for North America** > **U.S. Annual Processing** > **1099-R Reporting** > **Review 1099-R Consent Status** > **Review 1099-R Consent Status**

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



Note: The Review W-2/W-2c Consent Status page, Review 1042-S Consent Status page, and Review 1099-R Consent Status page look almost identical except for the page title and the list of supported forms.

Field or Control	***Description***
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 or form availability.

Note: As a payroll administrator, you can also generate the Electronic Year End Form Consent Status report (report ID: TAX900CS) to view a list of employees with the specified consent status values within a specified date range.

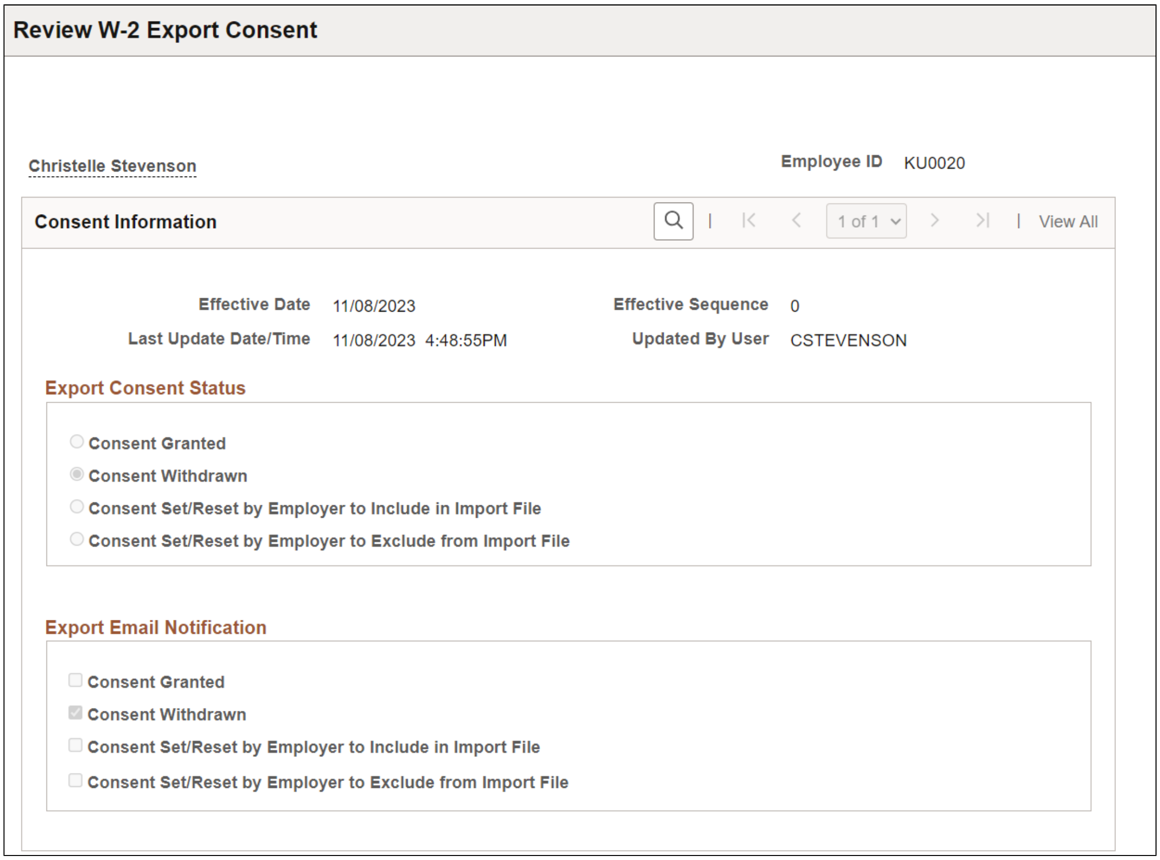
Review W-2 Export Consent Page

Use the Review W-2 Export Consent (PY_FORM_STAT_EXP) to review employees' tax data export consent and email notification statuses.

Navigation:

Payroll for North America > **U.S. Annual Processing** > **Year-End/New Year Preparation** > **Review W-2 Export Consent** > **Review W-2 Export Consent**

This example illustrates the fields and controls on the Review W-2 Export Consent page.



Field or Control	***Description***
Export Consent Status	Review the employee's consent status for sharing their W-2 or W-2c data. This status changes when the employee provides or withdraws consent to share their tax data in import files, or when the administrator runs the reset process.
Export Email Notification	Review the notification status for the employee's W-2 or W-2c data export consent.

Note: As a payroll administrator, you can also generate the Export Consent Change report (report ID: TAX901CS) to view a list of employees with the specified consent status values within a specified date range.

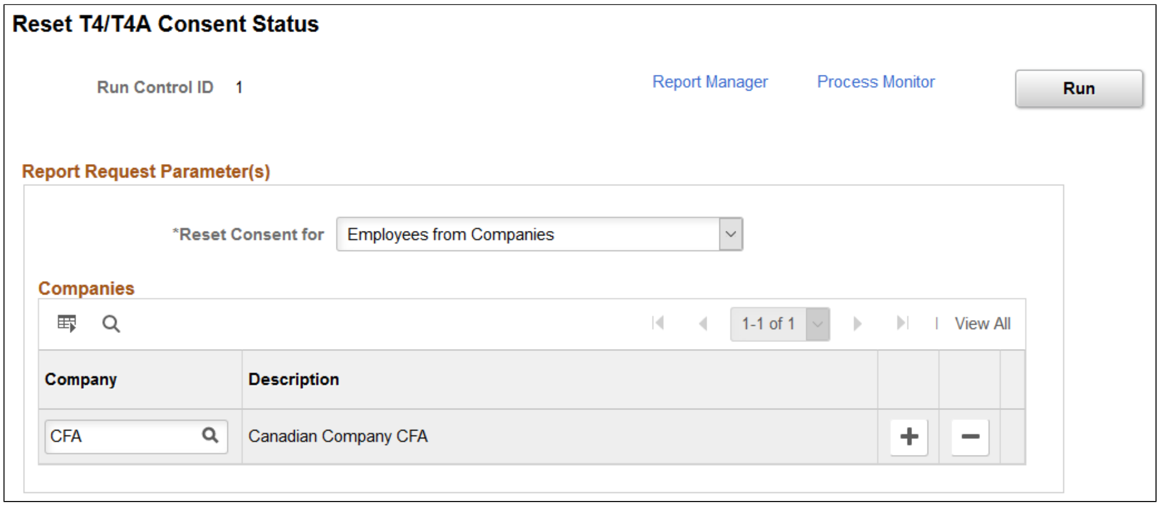
Reset <CAN Form> Consent Status Page

Use the Reset T4/T4A Consent Status page (PY_RC_RESCON_CAN) or Reset RL1/RL2 Consent Status page (PY_RC_RESCON_MRQ) as appropriate to reset the consent status for a list of identified employees.

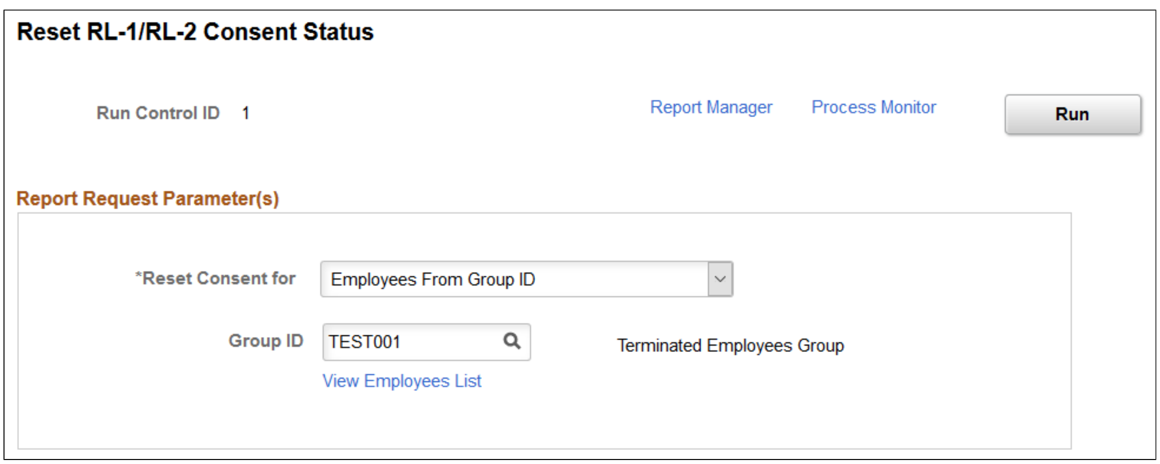
Navigation:

- (T4/T4A) **Payroll for North America** > **Year-End Processing CAN** > **Year-End/New Year Preparation** > **Reset T4/T4A Consent Status** > **Reset T4/T4A Consent Status**
- (RL-1/RL-2) **Payroll for North America** > **Year-End Processing CAN** > **Year-End/New Year Preparation** > **Reset RL-1/RL-2 Consent Status** > **Reset RL-1/RL-2 Consent Status**

This example illustrates the fields and controls on the Reset T4/T4A Consent Status page.



This example illustrates the fields and controls on the Reset RL-1/RL-2 Consent Status page.



Note: Except for the page title, the Reset T4/T4A Consent Status page looks and behaves the same way as the Reset RL-1/RL-2 Consent Status page.

Field or Control	***Description***
Reset Consent for	Select the method used to identify the list of employees for whom to reset consent. Values are: *All Employees*: All employees in the organization. *Employees from Companies*: All employees in selected companies. *Employees from File*: Employees identified in the flat file uploaded to the system. *Employees from Group ID*: Employees belonging to the specified group. *Selected Employees*: Employees selected in the Employees section.
Companies	This section appears after the *Employees from Companies* option is selected. Specify one or more companies. All employees belonging to these companies are included in the reset consent process.
Browse File	This field appears after the *Employees from File* option is selected. Select and upload a .csv or .txt file with a list of employees to be included in the reset consent process. The uploaded file must list the employee IDs in a single column with no header.
Group ID	This field appears after the *Employees from Group ID* option is selected. Specify a group ID. Groups are defined using Group Build. The system displays group IDs to which you have access based on group security. All employees associated with the specified group ID are included in the reset consent process. See View Employee List Page. Refer to “Understanding Group Build” (Application Fundamentals) and “Setting Up Group Definitions” (Application Fundamentals) for more information on the Group Build feature and how to define groups.
View Employees List	Click to view a list of employees that are associated with the specified group ID. See View Employee List Page.

Field or Control	***Description***
Employees	This section appears after the *Selected Employees* option is selected. Specify one or more employee IDs to be included in the reset consent process.

After the reset process is run successfully, the administrator can locate the count of employees who had consent reset in the process instance log file (the .stdout file) in Report Manager for verification purposes.

The administrator can also review the latest tax form consent and email notification statuses of employees on the Review <CAN Form> Consent Status Page.

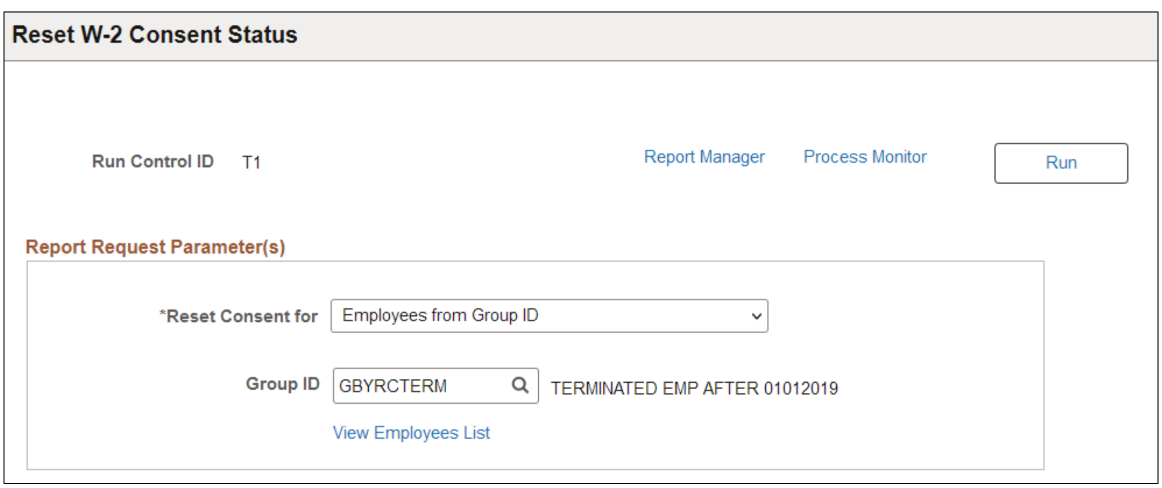
Reset <USA Form> Consent Status Page

Use the Reset W-2 Consent Status page (PY_RC_RESCON_USA), Reset 1042-S Consent Status page (PY_RC_RESCON_NRA), or Reset 1099-R Consent Status page (PY_RC_RESCON_1099R) as appropriate to reset the consent status for a list of identified employees, NRA employees, or 1099-R payees.

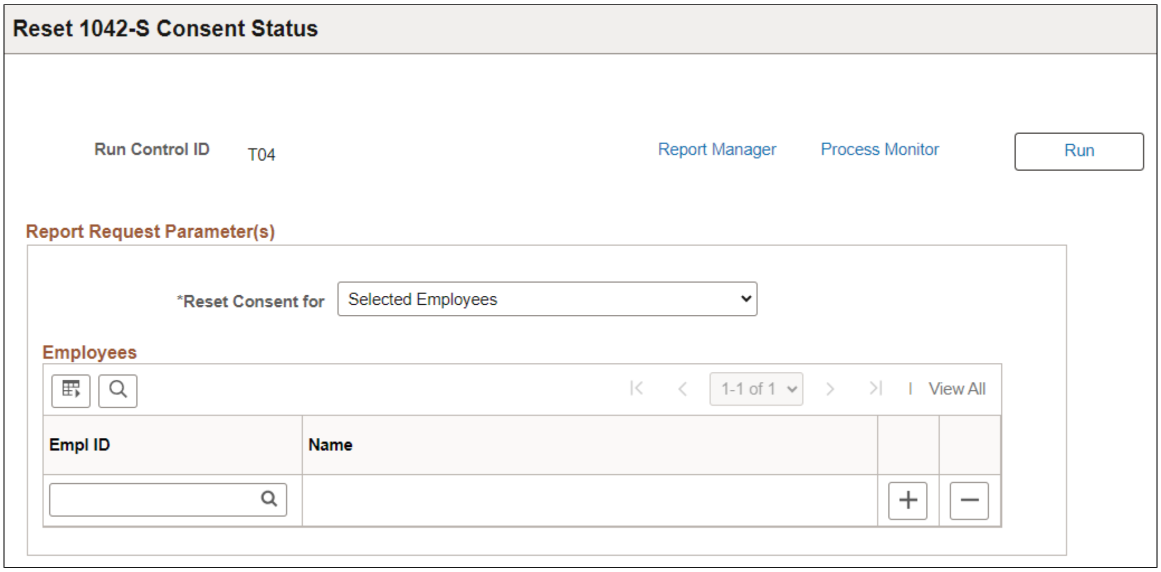
Navigation:

- (W-2) **Payroll for North America** > **U.S. Annual Processing** > **Year-End/New Year Preparation** > **Reset W-2 Consent Status** > **Reset W-2 Consent Status**
- (1042-S) **Payroll for North America** > **U.S. Annual Processing** > **1042-S Reporting** > **Reset 1042-S Consent Status** > **Reset 1042-S Consent Status**
- (1099-R) **Payroll for North America** > **U.S. Annual Processing** > **1099-R Reporting** > **Reset 1099-R Consent Status** > **Reset 1099-R Consent Status**

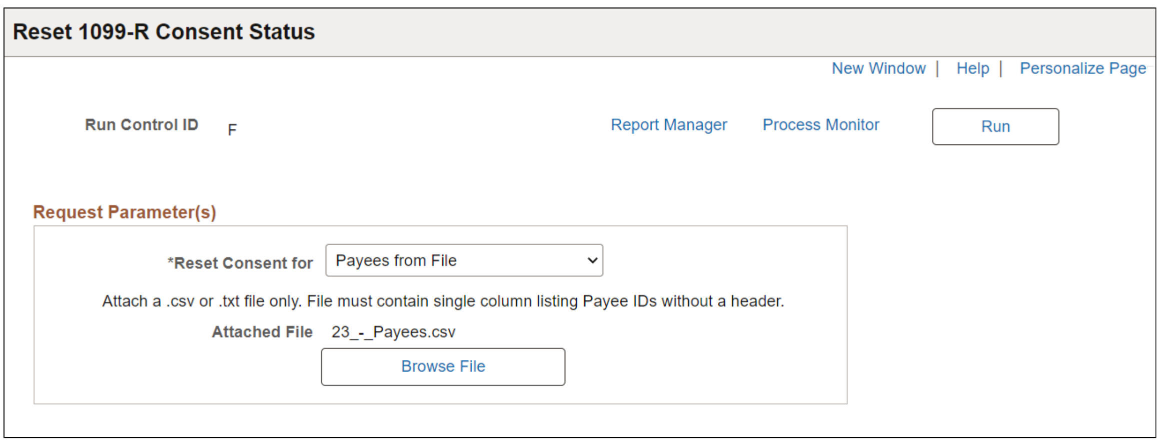
This example illustrates the fields and controls on the Reset W-2 Consent Status page.



This example illustrates the fields and controls on the Reset 1042-S Consent Status page.



This example illustrates the fields and controls on the Reset 1099-R Consent Status page.



Note: Except for the page title, the Reset W-2 Consent Status page looks and behaves the same way as the Reset 1042-S Consent Status page and Reset 1099-R Consent Status page.

Field or Control	***Description***
Reset Consent for	Select the method used to identify the list of employees for whom to reset consent. Values for W-2 are: *All Employees*: All employees in the organization. *Employees from File*: Employees identified in the flat file uploaded to the system. *Employees from Group ID*: Employees belonging to the specified group. *Employees from W-2 Companies*: All employees in selected W-2 companies. *Selected Employees*: Employees selected in the Employees section. Values for 1042-S are: *All Employees*: All non-resident alien employees in the organization. *Employees from Companies*: All non-resident alien employees in selected companies. *Employees from File*: Non-resident alien employees identified in the flat file uploaded to the system. *Employees from Group ID*: Non-resident alien employees belonging to the specified group. *Selected Employees*: Employees selected in the Employees section. Values for 1099-R are: *All Payees*: All payees in the organization. *Payees from 1099-R Companies*: All payees in selected 1099-R companies. *Payees from File*: Payees identified in the flat file uploaded to the system. *Payees from Group ID*: Payees belonging to the specified group. *Selected Payees*: Payees selected in the Selected Payee(s) section.
Browse File	This field appears after the *Employees from File* or *Payees from File* option is selected. Select and upload a .csv or .txt file with a list of employees to be included in the reset consent process. The uploaded file must list the employee IDs in a single column with no header.

Field or Control	*Description*
Group ID	This field appears after the Employees from Group ID, or *Payees from Group ID* option is selected. Specify a group ID. Groups are defined using Group Build. The system displays group IDs to which you have access based on group security. All employees associated with the specified group ID are included in the reset consent process. See View Employee List Page. Refer to “Understanding Group Build” (Application Fundamentals) and “Setting Up Group Definitions” (Application Fundamentals) for more information on the Group Build feature and how to define groups.
View Employees List or **View Payees List**	Click to view a list of employees or payees that are associated with the specified group ID. See View Employee List Page.
W-2 Reporting Companies	(For W-2) This section appears after the *Employees from W-2 Companies* option is selected. Specify one or more companies. All employees belonging to these companies are included in the reset consent process.
Reporting Companies	(For 1042-S) This section appears after the *Employees from Companies* option is selected. Specify one or more companies. All employees belonging to these companies are included in the reset consent process.
1099-R Companies	(For 1099-R) This section appears after the *Payees from 1099-R Companies* option is selected. Specify one or more 1099-R companies. All payees belonging to these companies are included in the reset consent process.
Employees	This section appears after the *Selected Employees* option is selected. Specify one or more employee IDs to be included in the reset consent process.
Selected Payee(s)	This section appears after the *Selected Payees* option is selected. Specify one or more payee IDs to be included in the reset consent process.

After the reset process is run successfully, the administrator can locate the count of employees who had consent reset in the process instance log file (the .stdout file) in Report Manager for verification purposes.

The administrator can also review the latest tax form consent and email notification statuses of employees on the Review <USA Form> Consent Status Page.

View Employee List Page

Use the View Employees List page (PY_GB_EMPL_LST) to view the list of employees or payees who are part of the specified group ID and are included in the consent reset process.

Navigation:

Click the **View Employees List** or **View Payees List** link that is available when a group ID is specified on the page to reset consent.

This example illustrates the fields and controls on the View Employee List page.

Field or Control	***Description***
Return	Select to return to the consent status run control page.

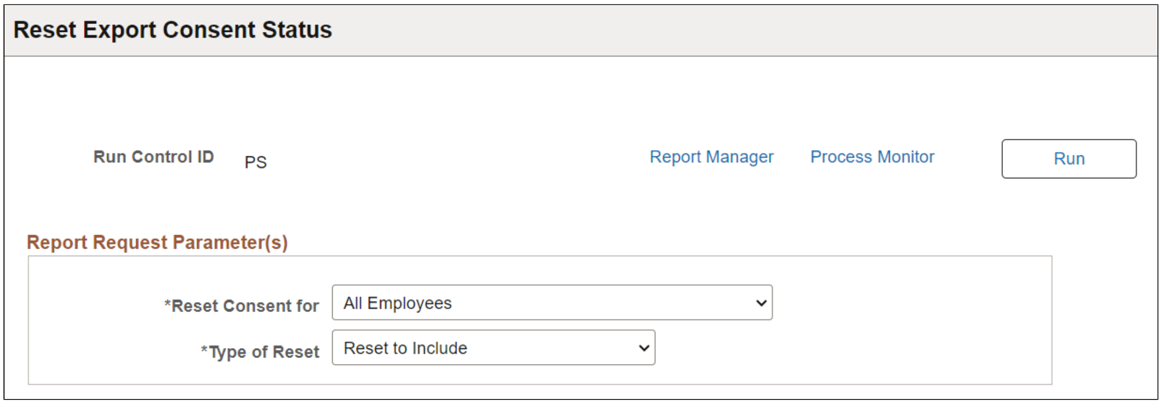
Reset Export Consent Status Page

Use the Reset Export Consent Status page (PY_RC_RSEXPCON_USA) to reset the W-2/W-2c data export consent status for a list of identified employees.

Navigation:

Payroll for North America > **U.S. Annual Processing** > **Year-End/New Year Preparation** > **Reset Export Consent Status** > **Reset Export Consent Status**

This example illustrates the fields and controls on the Reset Export Consent Status page.



Field or Control	***Description***
Reset Consent for	Select the method used to identify the list of employees for whom to reset consent. Values are: *All Employees*: All employees in the organization. *Employees from File*: Employees identified in the flat file uploaded to the system. *Employees from Group ID*: Employees belonging to the specified group. *Employees from W-2 Companies*: All employees in selected W-2 companies. *Selected Employees*: Employees selected in the Employees section. **Note:** Statuses will also be reset for terminated employees that are identified.
Type of Reset	Select to reset the consent status of identified employees. Values are: *Reset to Exclude* W-2/W-2c data from import files. *Reset to Include* W-2/W-2c data in import files.
Browse File	This field appears after the *Employees from File* option is selected. Select and upload a .csv or .txt file with a list of employees to be included in the reset consent process. The uploaded file must list the employee IDs in a single column with no header.

Field or Control	***Description***
Group ID	This field appears after the *Employees from Group ID* option is selected. Specify a group ID. Groups are defined using Group Build. The system displays group IDs to which you have access based on group security. All employees associated with the specified group ID are included in the reset consent process. See View Employee List Page. Refer to “Understanding Group Build” (Application Fundamentals) and “Setting Up Group Definitions” (Application Fundamentals) for more information on the Group Build feature and how to define groups.
View Employees List	Click to view a list of employees that are associated with the specified group ID. See View Employee List Page.
W-2 Reporting Companies	This section appears after the *Employees from W-2 Companies* option is selected. Specify one or more companies. All employees belonging to these companies are included in the reset consent process.
Employees	This section appears after the *Selected Employees* option is selected. Specify one or more employee IDs to be included in the reset consent process.

After the reset process is run successfully, the administrator can locate the count of employees who had consent reset in the process instance log file (the .stdout file) in Report Manager for verification purposes.

The administrator can also review the latest export consent and email notification statuses of employees on the Review W-2 Export Consent Page.

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. **Note:** Canadian employees can also view their year-end forms in Fluid Employee Self-Serivce. For more information, refer to the (CAN) Using the PeopleSoft Fluid User Interface to Manage Consent for Electronic Year-End Forms topic.

Page Name	***Definition Name***	***Usage***
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. **Note:** U.S. employees can also view their year-end forms in Fluid Employee Self-Serivce. For more information, refer to the (USA) Using the PeopleSoft Fluid User Interface to Manage Consent and View Electronic Year-End Forms topic.

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 (Payroll for North America Tax Update Documentation) at the end 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 (Payroll for North America Tax Update Documentation) at the end of each year.

For more information, see the product documentation for:

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

Setting Up Accessibility for Year-End Forms

This topic provides an overview of year-end form accessibility for self-service users, and discusses how to set up accessibility for year-end forms.

Page Used to Set Up Accessibility for Year-End Forms

Page Name	***Definition Name***	***Usage***
Year End Accessibility Page	TAXFORM_ACC_SETUP	Set up accessibility parameters for year-end tax forms.
Accessibility Instructions Page	TAXFRM_INS_ACC_SEC	View or update instructional texts that are used for viewing year-end tax forms in screen reader mode.
Filing Instructions Page	TAX_FILINGINST_SEC	View instructional texts that are used in filing the tax forms in screen reader mode.
View <Tax Form or Slip> Page (Screen Reader Mode)	[varies]	View the list of year-end tax forms or slips by tax year in screen reader mode
View <Tax Form Name and Year> Page	[varies]	View year-end tax forms in screen reader mode.
View Pages	PY_SS_YEW2_PGS_SCF	View or print overflow year-end forms in single-page PDFs individually.

Understanding Year-End Form Accessibility for Self-Service Users

PeopleSoft for North America supports the display of year-end tax forms in screen reader mode in Employee Self-Service. By providing accessibility setup configurations for tax forms, it allows self-service users to access tax form information using screen readers when they log on to the PeopleSoft system with screen reader mode enabled.

Users can also view and print the year-end forms in PDF format in screen reader mode. For example, use the **Printable <Tax Form Name>** button to view and print the corresponding tax form in PDF format.

Note: PeopleSoft delivers accessibility configurations for these tax forms: W-2, W-2c, W-2AS, W-2GU, W-2VI, 1042-S, 1099-R, T4 slip, T4A slip, RL-1 slip, and RL-2 slip. These configurations (except for 1042-S and 1099-R) are available starting from year 2012. Configurations for 1042-S and 1099-R are available starting from year 2022.
Accessibility configuration is set up by tax form and year. The accessibility view of a tax form of a year is available only if the configuration is already set up for this tax form and year on the Year End Accessibility Page.

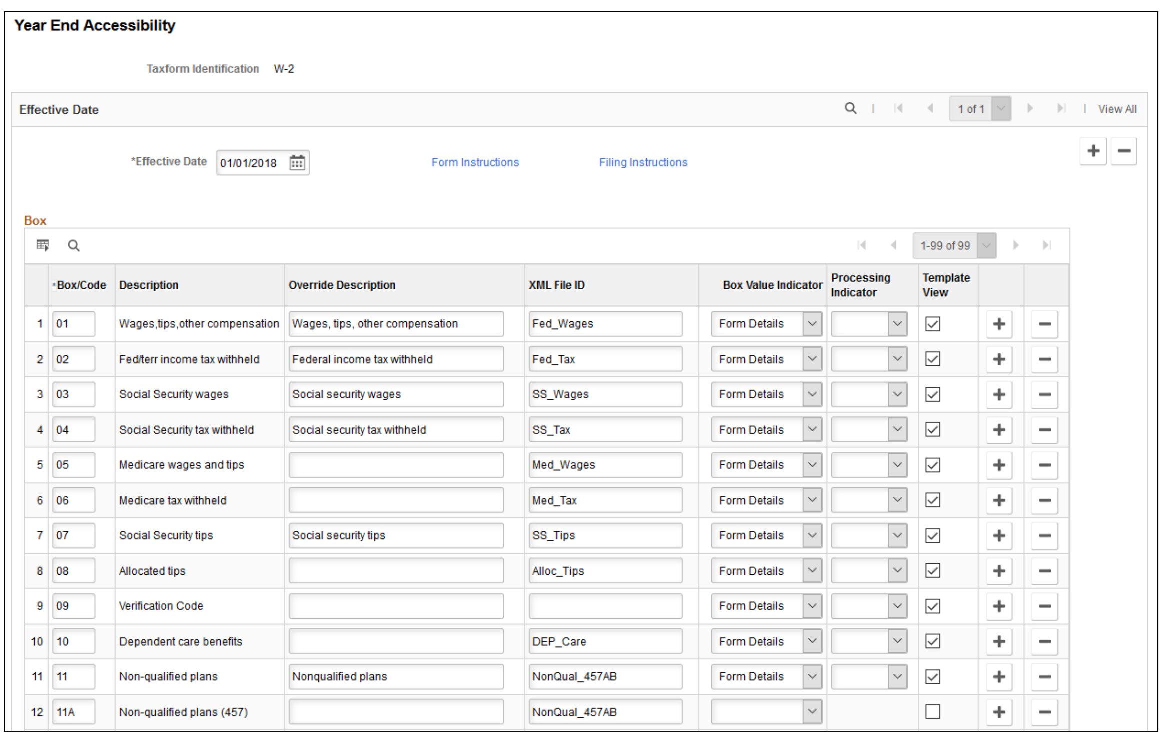
Year End Accessibility Page

Use the Year End Accessibility page (TAXFORM_ACC_SETUP) to set up accessibility parameters for year-end tax forms.

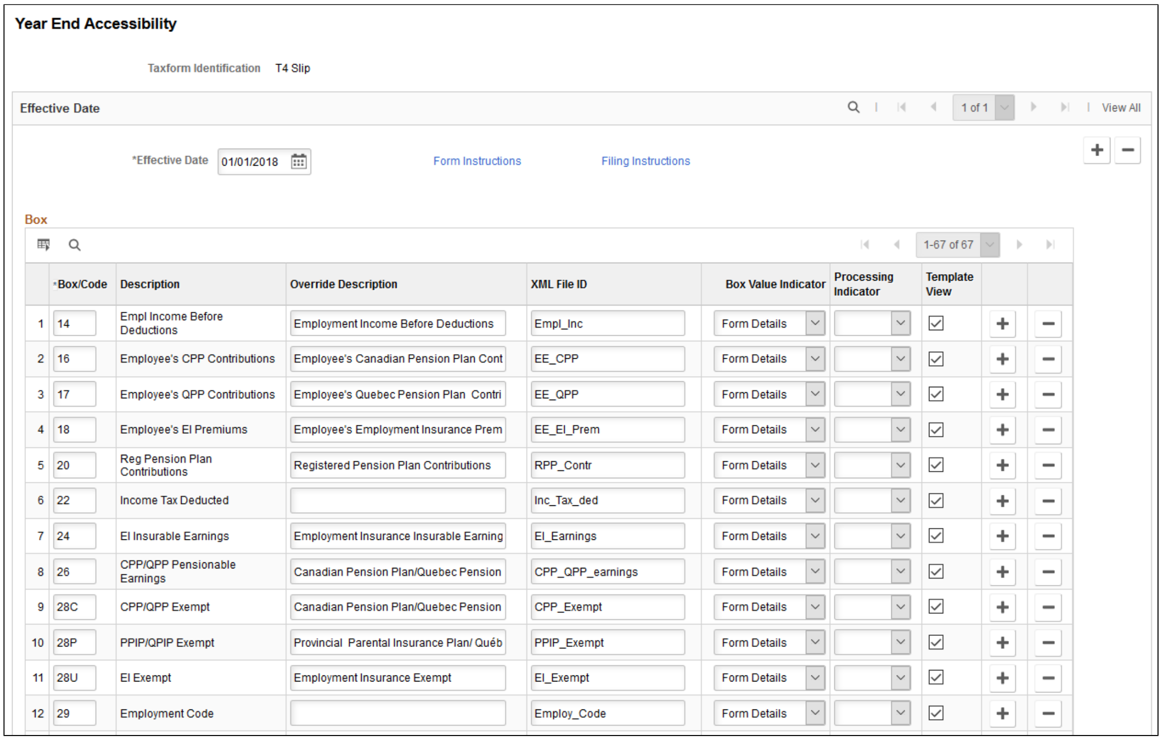
Navigation:

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

This example illustrates the W-2 accessibility setup on the Year End Accessibility page.



This example illustrates the T4 accessibility setup on the Year End Accessibility page.


Year End Accessibility

Taxform Identification T4 Slip

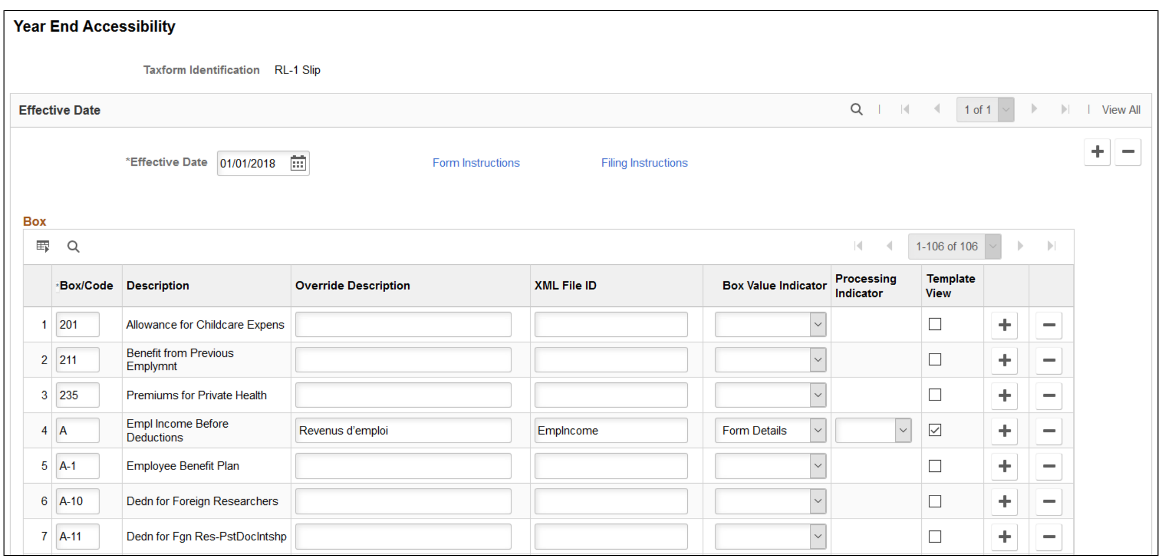
Effective Date 1 of 1 View All

*Effective Date 01/01/2018 Form Instructions Filing Instructions

Box 1-67 of 67

	*Box/Code	Description	Override Description	XML File ID	Box Value Indicator	Processing Indicator	Template View
1	14	Empl Income Before Deductions	Employment Income Before Deductions	Empl_Inc	Form Details		☑
2	16	Employee's CPP Contributions	Employee's Canadian Pension Plan Cont	EE_CPP	Form Details		☑
3	17	Employee's QPP Contributions	Employee's Quebec Pension Plan Contri	EE_QPP	Form Details		☑
4	18	Employee's EI Premiums	Employee's Employment Insurance Prem	EE_EI_Prem	Form Details		☑
5	20	Reg Pension Plan Contributions	Registered Pension Plan Contributions	RPP_Contr	Form Details		☑
6	22	Income Tax Deducted		Inc_Tax_ded	Form Details		☑
7	24	EI Insurable Earnings	Employment Insurance Insurable Earning	EI_Earnings	Form Details		☑
8	26	CPP/QPP Pensionable Earnings	Canadian Pension Plan/Quebec Pension	CPP_QPP_earnings	Form Details		☑
9	28C	CPP/QPP Exempt	Canadian Pension Plan/Quebec Pension	CPP_Exempt	Form Details		☑
10	28P	PPIP/QPIP Exempt	Provincial Parental Insurance Plan/ Québ	PPIP_Exempt	Form Details		☑
11	28U	EI Exempt	Employment Insurance Exempt	EI_Exempt	Form Details		☑
12	29	Employment Code		Employ_Code	Form Details		☑

This example illustrates the RL-1 accessibility setup on the Year End Accessibility page.


Year End Accessibility

Taxform Identification RL-1 Slip

Effective Date 1 of 1 View All

*Effective Date 01/01/2018 Form Instructions Filing Instructions

Box 1-106 of 106

	*Box/Code	Description	Override Description	XML File ID	Box Value Indicator	Processing Indicator	Template View
1	201	Allowance for Childcare Expens					☐
2	211	Benefit from Previous Emplymnt					☐
3	235	Premiums for Private Health					☐
4	A	Empl Income Before Deductions	Revenus d'emploi	EmplIncome	Form Details		☑
5	A-1	Employee Benefit Plan					☐
6	A-10	Dedn for Foreign Researchers					☐
7	A-11	Dedn for Fgn Res-PstDoclntshp					☐

Payroll for North America delivers setup configurations to support the display of year-end tax forms in screen reader mode in Employee Self-Service. These configurations include:

- Mapping of valid boxes and codes with corresponding XML tags in tax form definitions.
- Display or processing logic.
- New box labels that override default descriptions.

Important! Oracle recommends that you modify only the override descriptions and form instructions in delivered tax form configurations if necessary.

Field or Control	***Description***
Taxform Identification	Displays the tax form to which the accessibility setup applies.
Form Instructions	Click to view the instructional text that appears in the Instructions section of the View <Tax Form Name and Year> page in screen reader mode.
Filing Instructions	Click to view the instructional text for filing the tax form, which appears on the View <Tax Form Name> page where users can view tax forms by different tax years, for example, the View W-2/W-2c Forms page (PY_SS_YEW2_FORM_FL).
Box/Code	Based on the selected tax form and year, the system populates the corresponding boxes or codes from the Tax Form Definitions page along with descriptions.
Description	Displays the default description defined for the corresponding Box/Code on the Tax Form Definitions page. **Note:** This field is editable for Form 1042-S and Form 1099-R. **Note:** In screen reader 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 preferred description to be displayed for the corresponding Box/Code when users view the tax form in screen reader mode. If this field is left blank, the default description will be displayed. **Note:** This field is not available for Form 1042-S and Form 1099-R.
XML File ID	Indicates the mapping between the Box/Code and the XML tag in the XMLP template for the corresponding tax form definition.

Field or Control	Description
Box Value Indicator	Indicates the mapping of the Box/Code to the corresponding section on the page that displays the tax form (screen reader mode). Available options are: • *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 <Tax Form Name> Details section. This section specifies information that is specific to the tax form. The options listed below are applicable to tax forms with corrected information, for example, W-2c. • *Employee Correction*: This option is used to map the Box/Code to the Corrected Employee Information section. This section specifies employee information that was previously reported and is now corrected. • *Federal*: This option is used to map the Box/Code to the Corrected Federal Information section. This section specifies federal information that was previously reported and is now corrected. • *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 local information that was previously reported and is now corrected. • *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 state information that was previously reported and is now corrected. The Box/Code details will be displayed in each section of the View <Tax From Name and Year> page (screen reader mode) based on this mapping.

Field or Control	***Description***
Processing Indicator	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 *Employee Correction* box value indicator, where we append the employee's first name, last name and suffix together. **Note:** Currently this process indicator is applicable only to tax forms with corrected information, for example, W-2c. • *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 are in the same XML tag, then the Processing Indicator will be *Other*. Currently this is used in Box 14 of W-2-related tax forms. **Note:** Box 14 does not display long descriptions in screen reader mode. It displays the Box/Code values only. • *Overflow*: For single Box/Code, if the XML file ID field contains two field values, one for label and another for value, the processing indicator will be *overflow*. The system will identify the first tag value as the box code and second tag value as the corresponding value. Currently this is used in Box 12 of W-2-related tax forms. **Note:** By default, normal processing is followed if this field is left blank.
Template View	Select to display the corresponding box and description on the tax form or slip. When an employee views a year-end form or slip in screen reader mode, the system displays by default only boxes that have the **Template View** option selected *and* contain form values. If the employee selects to view all boxes on the form or slip, all boxes with the **Template View** option will be displayed, regardless of the presence of form values.

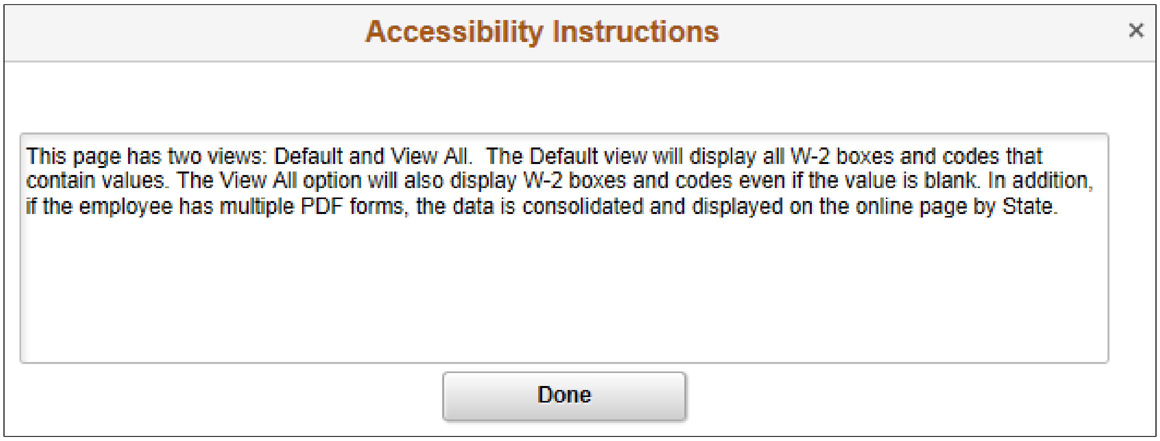
Accessibility Instructions Page

Use the Accessibility Instructions page (TAXFRM_INS_ACC_SEC) to view or update the instructional texts used for viewing year-end tax forms in screen reader mode.

Navigation:

Click the **Form Instructions** link on the Year End Accessibility page.

This example illustrates the Accessibility Instructions.



Content displayed on this page is the standard accessibility instruction that PeopleSoft delivers. You can modify the text if needed.

At runtime, this instructional text appears on the Instructions section of the View <Tax Form Name and Year> page in screen reader mode, when the corresponding tax form is being viewed.

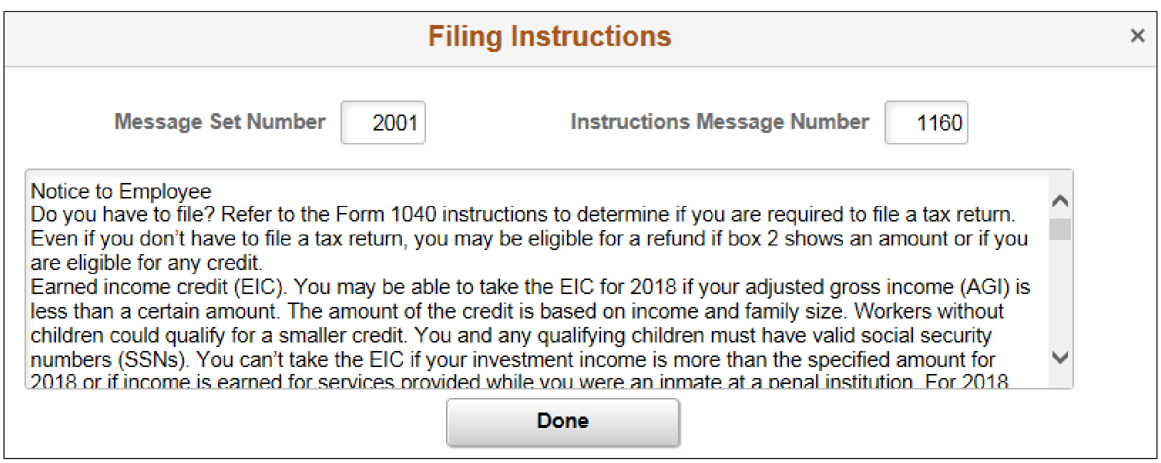
Filing Instructions Page

Use the Filing Instructions page (TAX_FILINGINST_SEC) to view instructional texts used for filing tax forms.

Navigation:

Click the **Filing Instructions** link on the Year End Accessibility page.

This example illustrates the Filing Instructions.



Filing instructions are managed through message catalogs.

At runtime, this instructional text appears on the View <Tax Form Name and Year> page where users can view the corresponding tax forms by different tax years, for example, the View W-2/W-2c Forms page (PY_SS_YEW2_FORM_FL).

View <Tax Form or Slip> Page (Screen Reader Mode)

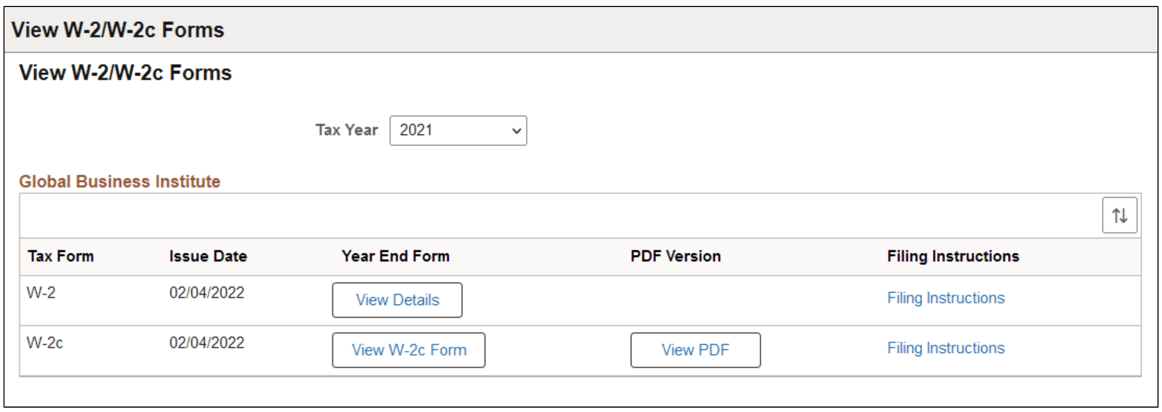
Use the View <Tax Form or Slip> page to view the list of year-end tax forms or slips by tax year in screen reader mode.

Navigation:

- Select the **Enable Screen Reader Mode** option on the PeopleSoft logon page and sign in.
- Select the applicable country or tax form options in the **Fluid HTML View in Standard Mode** section of the Payroll for NA Installation page.

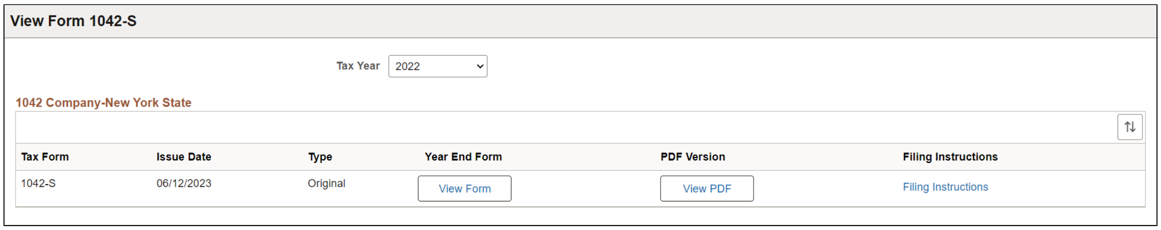
Then, navigate to the desired tax form using the **Payroll** tile in Employee Self-Service.

This example illustrates the View W-2/W-2c Forms page in screen reader mode.

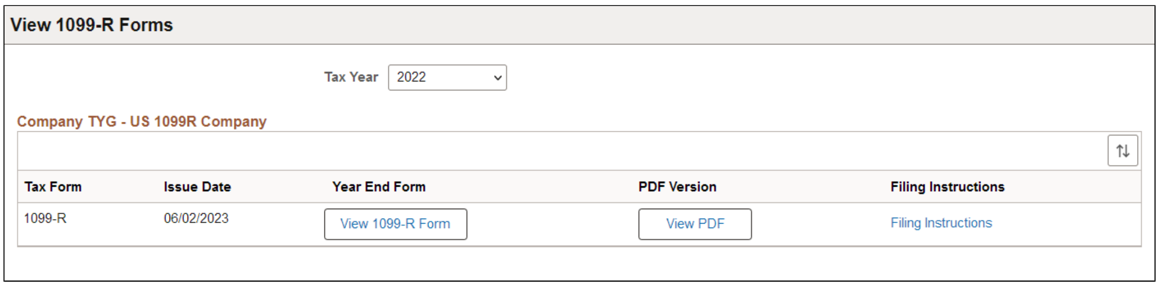


This example illustrates the View W-2 Details page in screen reader mode for employees with multiple copies of the same tax form and year.

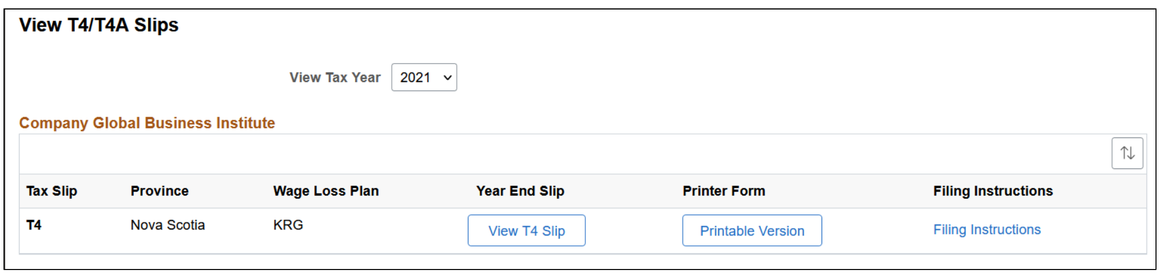
This example illustrates the View Form 1042-S page in screen reader mode.



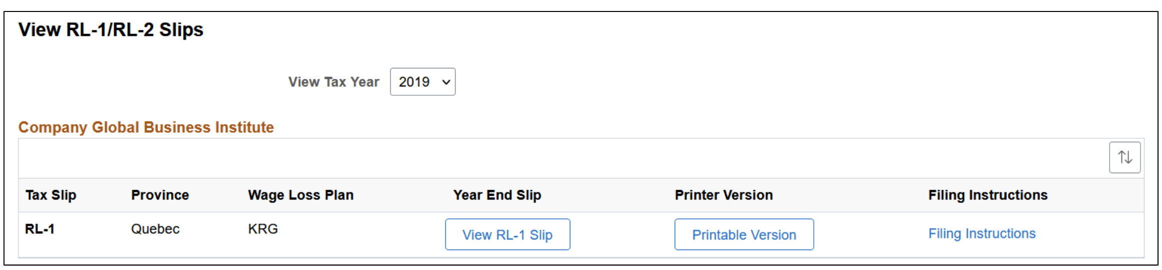
This example illustrates the View 1099-R Forms page in screen reader mode.



This example illustrates the View T4/T4A Slips page in screen reader mode.



This example illustrates the View RL-1/RL-2 Slips page in screen reader mode.



Note: Starting in tax year 2021, the self service PDF version of Form W-2 for U.S. employees is accessible and can be read by a screen reader, for example, JAWS.

Important! You can also view the screen reader version (HTML) of year-end forms in standard mode, if the country-specific or tax form options are selected in the **Fluid HTML View in Standard Mode** section on the "Payroll for NA Installation Page" (PeopleSoft Payroll for North America).

Field or Control	***Description***
Tax Year or **View Tax Year**	Select the year of the tax form you wish to view.
View <Tax Form Name> or **View**	Select the button to view the corresponding tax form online in screen reader mode.
View Details	Select the button to select and view tax forms by state or type on the View <Tax Form Name> Details page. **Note:** This button appears if the user has more than one copy of the tax form for the same tax form definition and year, for example, W-2s from different states, or RL-1 slips of different types (original and amended).
(USA) **View PDF** or (CAN) **Printable Version**	Select the button to view or print the corresponding tax form in the PDF format in a new browser tab or window. **Note:** (For overflow W-2 forms) Select the button to view or print each of the W-2 pages individually on the View Pages.
Filing Instructions	Select the link to view the filing instructions of the corresponding tax form online. A button is available on the online page for you to view or print the instructions in PDF if needed.

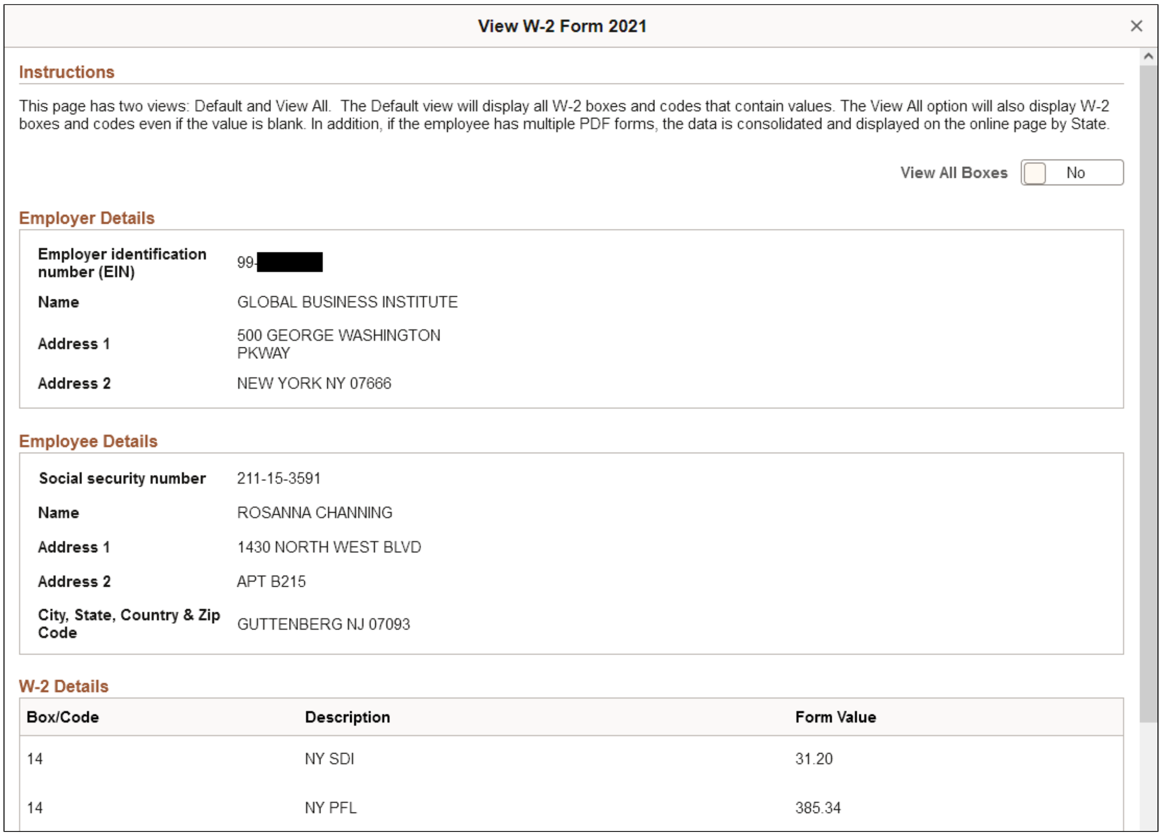
View <Tax Form Name and Year> Page

Use the View <Tax Form Name and Year> page to view year-end tax forms or slips in screen reader mode.

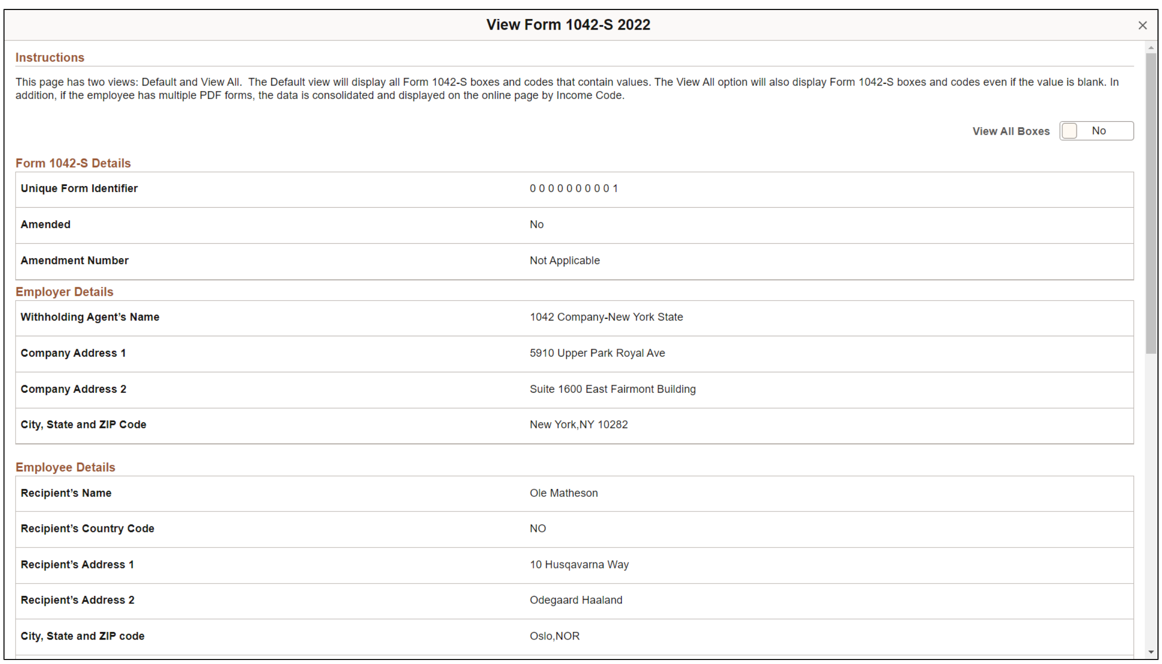
Navigation:

Select the **View <Tax Form Name>** or **View** button from the page.

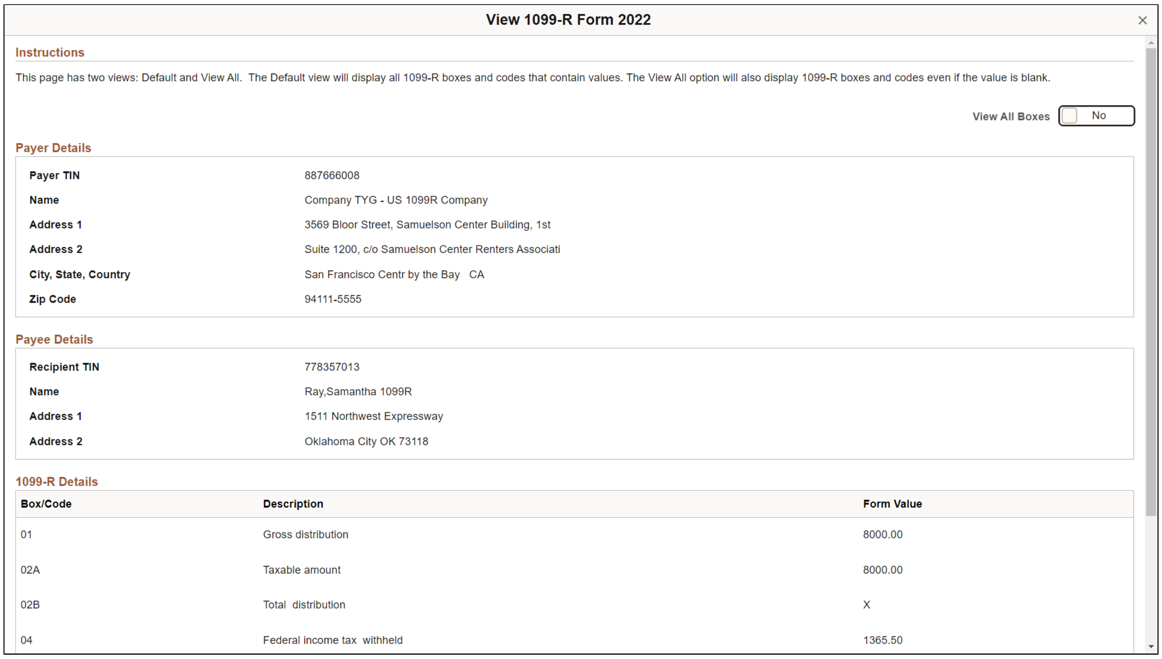
This example illustrates the View W-2 Form <Year> page in screen reader mode.



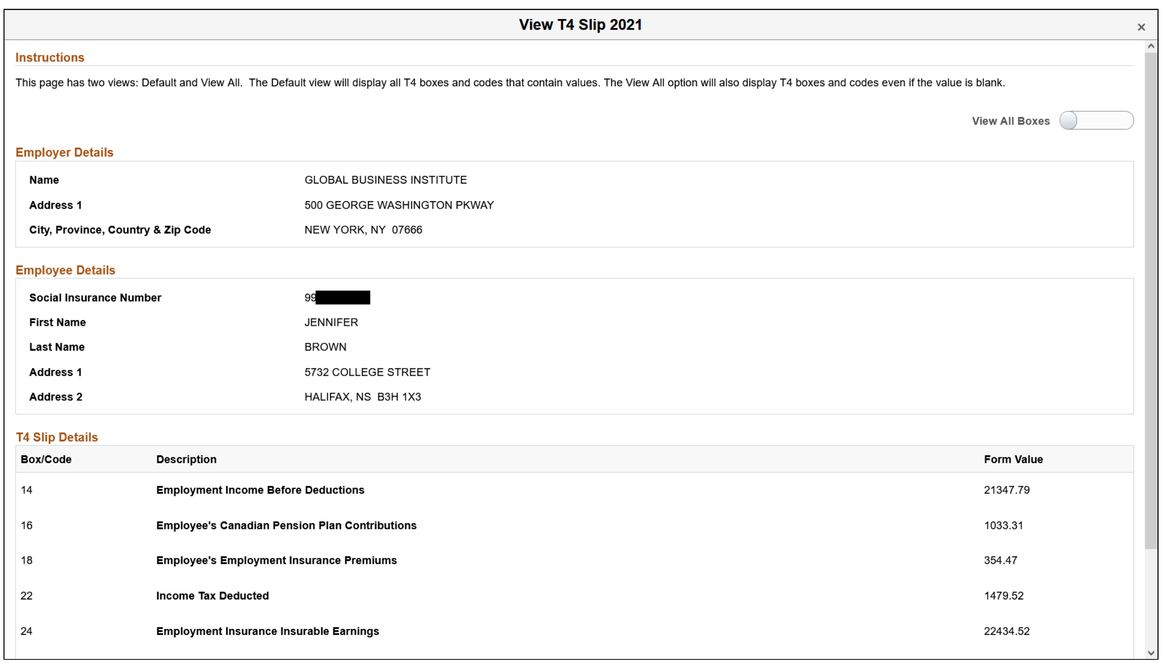
This example illustrates the View Form 1042-S <Year> page in screen reader mode.



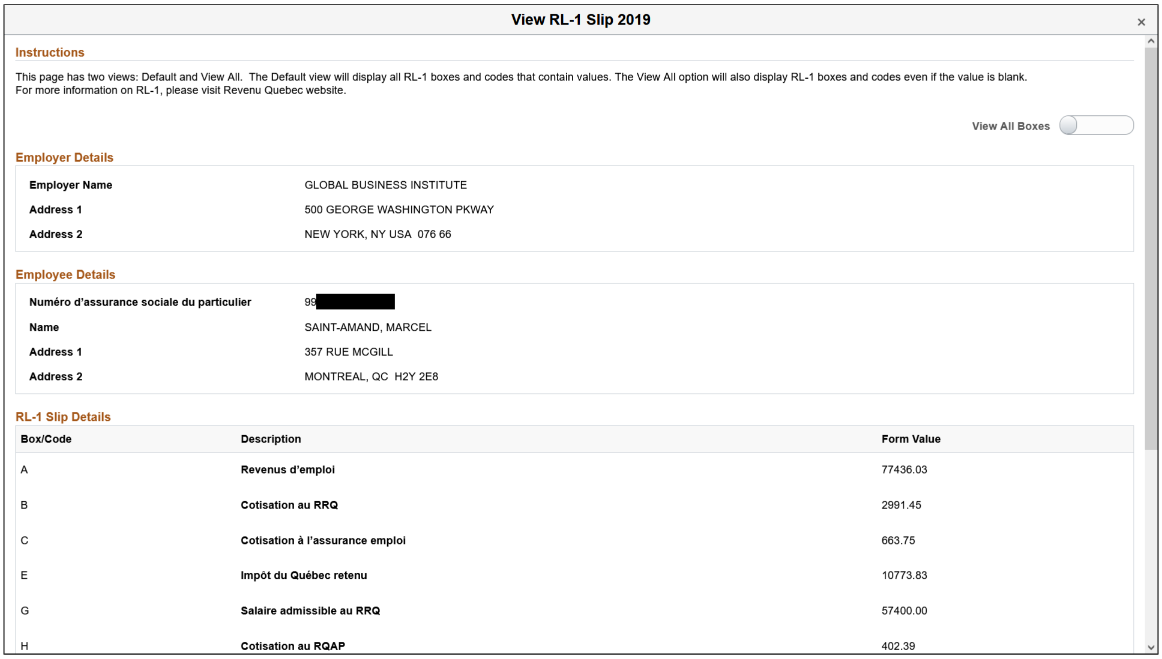
This example illustrates the View 1099-R Form <Year> page in screen reader mode.



This example illustrates the View T4 Slip <Year> page in screen reader mode.



This example illustrates the View RL-1 Slip <Year> page in screen reader mode.



This online page is displayed based on the accessibility configuration that is defined on the Year End Accessibility Page.

Field or Control	***Description***
View All Boxes	Click to show on the tax form or slip all boxes and codes that have the **Template View** option selected on the Year End Accessibility page. It includes all the *Template View-enabled* boxes with or without form values. **Note:** If this option is disabled, only boxes and codes with form values will be displayed on the page.
(USA) **View PDF** or (CAN) **Printable <Tax Form Name>**	Select the button to view or print the corresponding tax form in the PDF format in a new browser tab or window. (For overflow W-2 forms) Select the button to view or print each of the W-2 pages individually on the View Pages.

Related Links

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

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

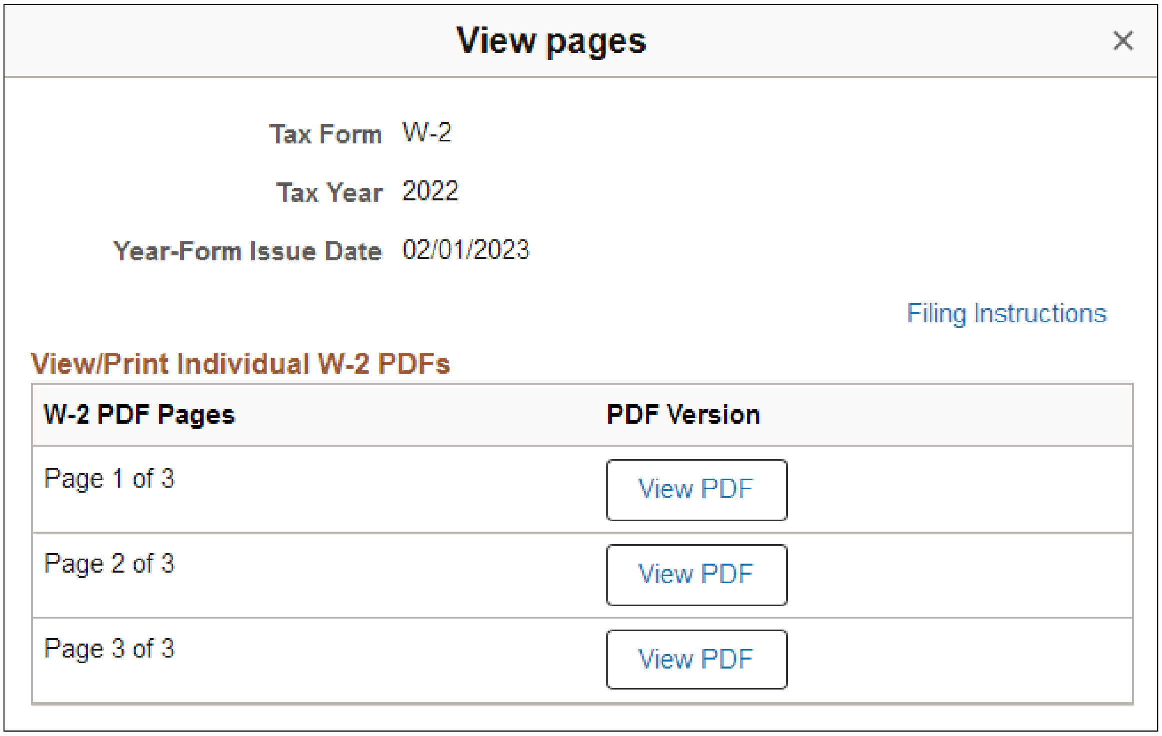
View Pages

Use View Pages (PY_SS_YEW2_PGS_SCF) to view or print overflow year-end forms in single-page PDFs individually.

Navigation:

Select the **View PDF** button of an overflow year-end form on the View W-2/W-2c Forms page.

This example illustrates View Pages.



Note: This page appears if the year-end form you select to view contains multiple PDF pages (overflow).

Field or Control	***Description***
Filing Instructions	Select to view or print the filing instructions of the tax slip in PDF.
View PDF	Select the button to view or print the selected page of the year-end form in PDF.
View All Pages	Select to view or print all pages of the year-end form in a consolidated PDF. **Note:** Consolidated (multi-page) PDFs are not accessible by screen readers. This button appears if the configuration option to view consolidated PDFs in the current mode (standard or screen reader) is selected on the "Payroll for NA Installation Page" (PeopleSoft Payroll for North America).

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

This topic discusses how employees manage consent and view electronic year-end forms for USA in Fluid Employee Self-Service.

Video: Image Highlights, PeopleSoft HCM Update Image 47: Employee Self Service Forms 1042-S and 1099-R

Video: Image Highlights, PeopleSoft HCM Update Image 48: Opt-out Sending W-2 Info to Tax Preparer Provider Using Employee Self-Service

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	Submit or withdraw consent to receive electronic W-2 and W-2c forms and share data with tax preparation software providers.
Verify Identity Page	N/A	Enter their password to confirm their consent for electronic year-end forms.
View W-2/W-2c Forms Page	PY_SS_YEW2_FORM_FL	View the W-2/W-2c forms in Employee Self-Service.
View W-2 Details Page	PY_SS_YE_W2_SCF	Select and view tax forms by state.
1042-S Consent Page	PY_1042S_CONS_FL	Submit or withdraw consent to receive electronic Form 1042-S.
View Form 1042-S Page	PY_SS_YENR_FORM_FL	View 1042-S forms in Employee Self-Service.
View Form 1042-S Page	PY_SS_YE_NRA_SCF	Select and view 1042-S forms by income code.

Page Name	***Definition Name***	***Usage***
1099-R Consent Page	PY_1099R_CONS_FL	Submit or withdraw consent to receive electronic Form 1099-R.
View 1099-R Forms Page	PY_SS_1099R_FRM_FL	View 1099-R forms in Employee Self-Service.
View Form 1099-R Page	PY_SS_1099R_SCF	Select and view 1099-R forms by distribution code.

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

Term	***Definition***
NA Payroll Fluid W2 User	This role is required to access the consent form and tax forms for W-2/W-2c.
NA Payroll Fluid 1042S User	This role is required to access the consent form and tax forms for 1042-S.

Term	Definition
NA Payroll Fluid 1099R User	This role is required to access the consent form and tax forms for 1099-R.

Form Availability Notification

The system generates notifications when you select the **Availability Notification** button on the Year End Form Options Page, notifying employees that their year-end forms are available for viewing in Employee Self-Service.

Year-End Consent Form Access During PreBoarding

Future hires or rehires can update their consent information on the W-2/W-2c Consent Page, 1042-S Consent Page, and 1099-R Consent Page if the options are enabled in the **Future Hire Self Service Access** section of the “Payroll for NA Installation Page” (PeopleSoft Payroll for North America). Future hires can access consent form pages using the “OnBoarding Activities Tile (for Employees)” (PeopleSoft Human Resources Administer Workforce) prior to their hire date, if the step is added to the activity guide template that is used to support the PreBoarding phase of the OnBoarding process.

Year-End Form Configuration for Self-Service

Payroll for North America provides system-level options to control the availability of year-end forms in Employee Self-Service.

By default, year-end forms are viewable in PDF in standard mode, and in both PDF and HTML in screen reader mode.

(U.S. and Canada) Options in the **Fluid HTML View in Standard Mode** section of the “Payroll for NA Installation Page” (PeopleSoft Payroll for North America) allow employees of selected country or tax forms to view year-end form (or slip) details and filing instructions from online pages (HTML) when the system is in standard mode, in addition to the PDF version. Employees see the same behavior when they enable the screen reader mode on the PeopleSoft signon page or from the **My Preferences** page, irrespective of these options.

(U.S.) For year-end forms to be processed by the screen reader properly in the case of overflow, the system splits the multi-page PDF into multiple single-page PDFs. In addition to viewing overflow form pages separately, configuration options are available to provide employees the choice of viewing all pages of an overflow form together in a single consolidated PDF in standard mode, screen reader mode, or both.

Note: Consolidated (multi-page) PDFs are not accessible by screen readers.

Video: Image Highlights, PeopleSoft HCM Update Image 44: Year-End Detail Access for All Users in Employee Self-Service

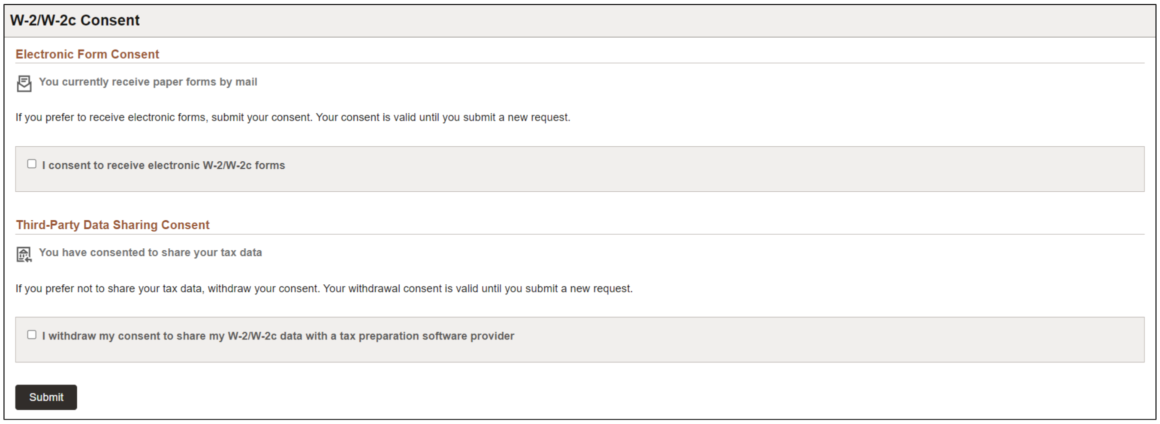
W-2/W-2c Consent Page

Use the W-2/W-2c Consent page (PY_W2_CONSENT_FL) to submit or withdraw consent to receive electronic W-2 and W-2c forms and share data with tax preparation software providers.

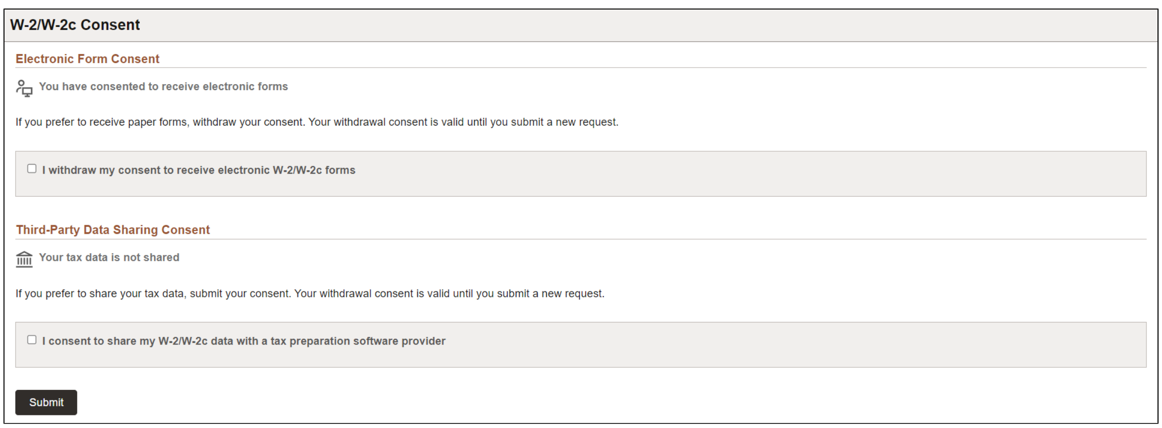
Navigation:

- Select the **W-2/W-2c Consent** tile from the Payroll Dashboard.
- Select **W-2/W-2c Consent** from the Fluid Navigation Collection for Payroll.

(Desktop) This example illustrates the W-2/W-2c Consent page for employees who are currently receiving paper forms and share data with tax preparation software providers.



This example illustrates the W-2/W-2c Consent page for employees currently receiving electronic forms and do not share data with any tax preparation software provider.



Electronic Form Consent

Field or Control	***Description***
I consent to receive electronic W-2/W-2c forms	Select to give consent to receive the forms electronically and stop receiving paper forms.This check box appears if the employee currently receives the year-end form in paper by mail.
I withdraw my consent to receive electronic W-2/W-2c forms	Select withdraw consent and receive paper forms.This check box appears if the employee currently receives the year-end form electronically.

Third-Party Data Sharing Consent

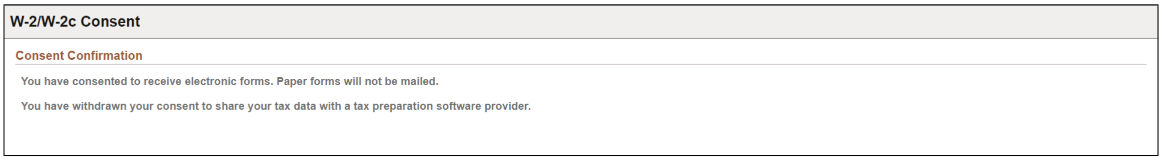
This section appears when the **Display Third-Party Data Sharing Consent in Self Service** option is selected on the “Payroll for NA Installation Page” (PeopleSoft Payroll for North America).

Field or Control	*Description*
I consent to share my W-2/W-2c data with a tax preparation software provider	Select to give consent to share W-2/W-2c data with a tax preparation software provider in an import file. This check box appears if: • The employee has not provided the consent. • The employee is newly hired and the system is configured to exclude the tax data for all employees from the import files. Or, • The administrator has run the process to reset the export consent status of employees to exclude their tax data from the import files.
I withdraw my consent to share my W-2/W-2c data with a tax preparation software provider	Select to withdraw consent to share W-2/W-2c data with a tax preparation software provider in an import file. This check box appears if: • The employee has provided the consent previously. • The employee is newly hired and the system is configured to include the tax data for all employees in the import files. Or, • The administrator has run the process to reset the export consent status of employees to include their tax data in the import files.
Submit	Select this button to submit the changes. Do not submit without selecting a check box first. Enter your login information on the Verify Identity Page that appears for authentication purposes.

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.

This example illustrates the W-2/W-2c Consent page after employees have submitted consent to receive year-end forms in electronic form and withdrawn consent to share data with tax preparation software providers.



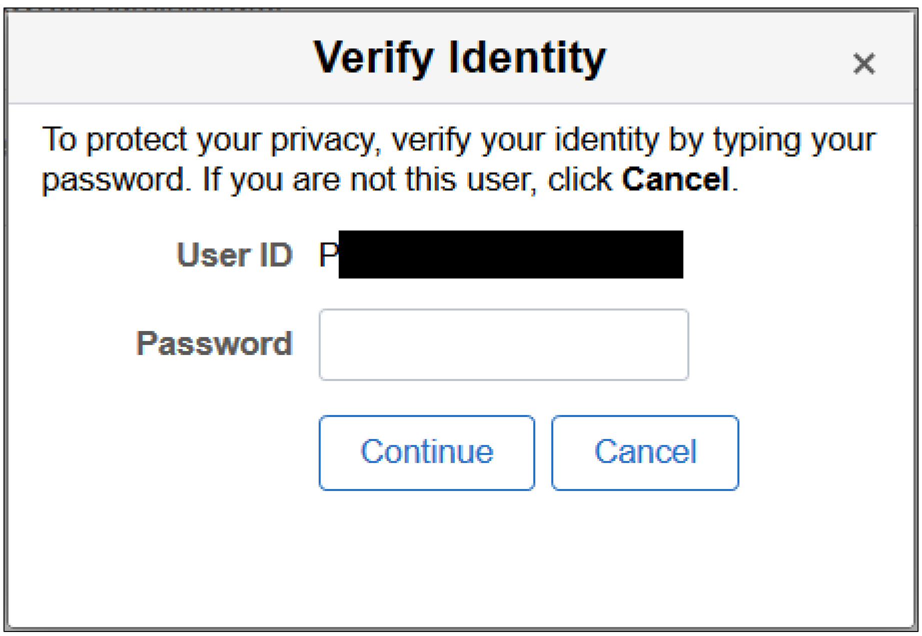
Verify Identity Page

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

Navigation:

Select the **Submit** button on a form consent page.

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



Employees verify their identity by entering their PeopleSoft password and then selecting 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

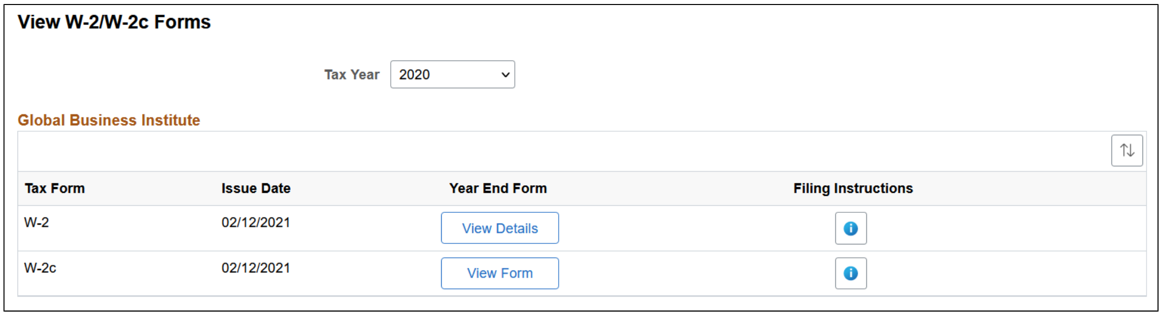
Use the View W-2/W-2c Forms page (PY_SS_YEW2_FORM_FL) to view the W-2/W-2c forms in Employee Self-Service.

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

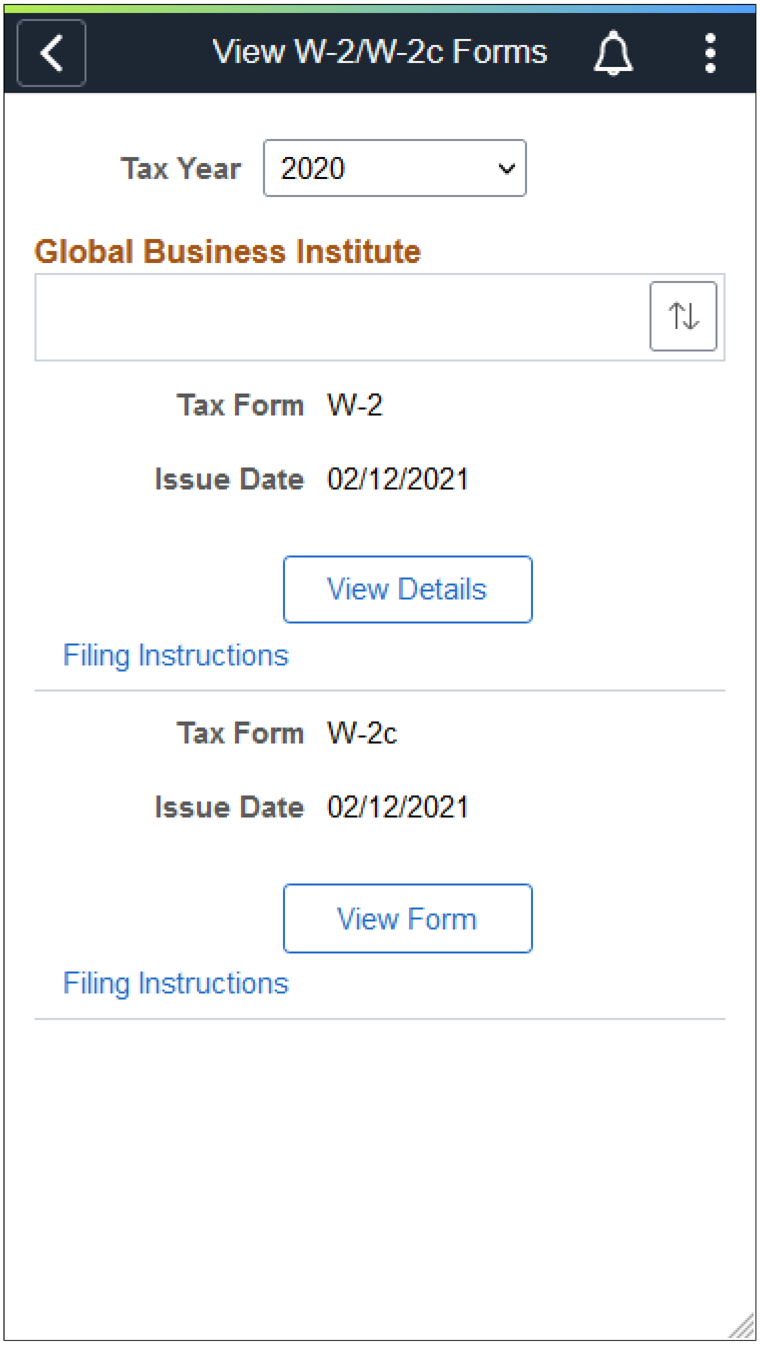
Navigation:

- Select the **W-2/W-2c Forms** tile from the Payroll Dashboard.
- Select **View W-2/W-2c Forms** from the Fluid Navigation Collection for Payroll.

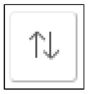
(Desktop) This example illustrates the fields and controls on the View W-2/W-2c Forms page,where the employee can view forms electronically after giving the consent.



(Smartphone) This example illustrates the fields and controls on the View W-2/W-2c Forms page, viewed from a smartphone.



Important! You can also view the screen reader version (HTML) of year-end forms in standard mode, if the country-specific option is selected in the **Fluid HTML View in Standard Mode** section on the "Payroll for NA Installation Page" (PeopleSoft Payroll for North America),
To view the screen reader version of W-2/W-2c form pages, see View <Tax Form or Slip> Page (Screen Reader Mode) and View <Tax Form Name and Year> Page.

Field or Control	*Description*
Tax Year	Select the tax year of the year-end forms you want to view or print. Year-end forms are listed by tax year.
	Sort the list by *Tax Form, Issue Date,* or *Company.* Company will be available in the sort option only if multiple companies are available for the same tax year.
View Form	Select the button to view or print the year-end form in PDF. **Note:** In screen reader mode, the system displays US forms online on a PeopleSoft page (in HTML) if the corresponding accessibility year-end setup is available for the selected year, in addition to the PDF version. This page will be displayed based on the setup that is defined on the Year End Accessibility Page.
View Details	Select the button to select and view tax forms by state on the View W-2 Details Page. The button appears for employees with forms for different states.
Filing Instructions	Select to view or print the filing instructions of the tax form in PDF.

View W-2 Details Page

Use the View W-2 Details page (PY_SS_YE_W2_SCF) to select and view tax forms by state.

Navigation:

Select the **View Details** button on the View W-2/W-2c Forms page.

This example illustrates the View W-2 Details Page.

Field or Control	***Description***
Filing Instructions	Select to view or print the filing instructions of the tax form in PDF.
View	Select the button to view or print the year-end form in PDF.

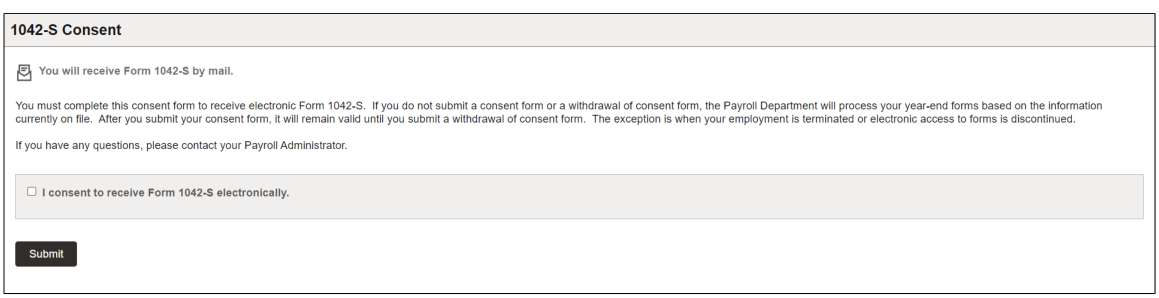
1042-S Consent Page

Use the 1042-S Consent page (PY_1042S_CONS_FL) to submit or withdraw consent to receive electronic Form 1042-S.

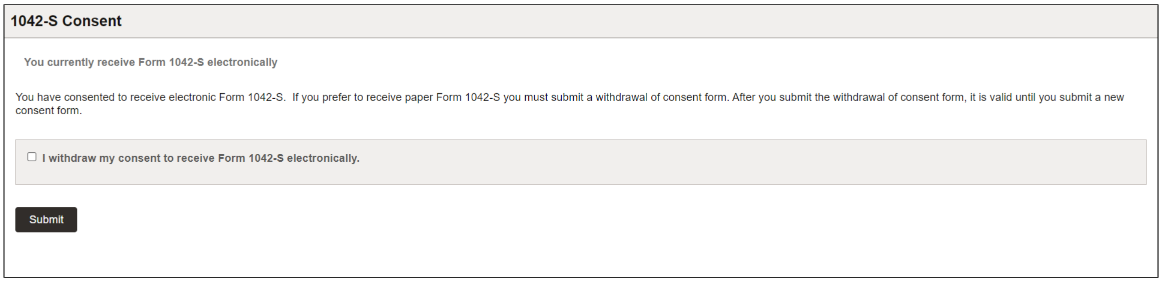
Navigation:

Select the **1042-S Consent** tile from the Payroll Dashboard.

(Desktop) This example illustrates the 1042-S Consent page for employees who are currently receiving paper forms.



This example illustrates the 1042-S Consent page for employees currently receiving electronic forms.



Changing Consent

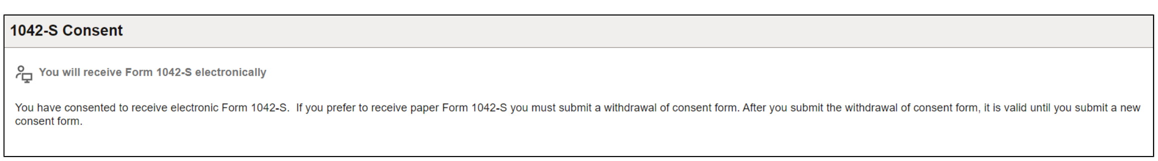
These page elements appear when an employee accesses the page.

Field or Control	***Description***
I consent to receive Form 1042-S 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 Form 1042-S 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 forms.
Submit	Select this button to submit the changes. Enter your login information on the Verify Identity Page that appears for authentication purposes.

Confirmation Information

The 1042-S Consent page displays confirmation information once the employees verify their identity and complete the process of submitting or withdrawing consent.

This example illustrates the 1042-S Consent page after an employee has submitted consent to receive year-end forms in electronic form.



View Form 1042-S Page

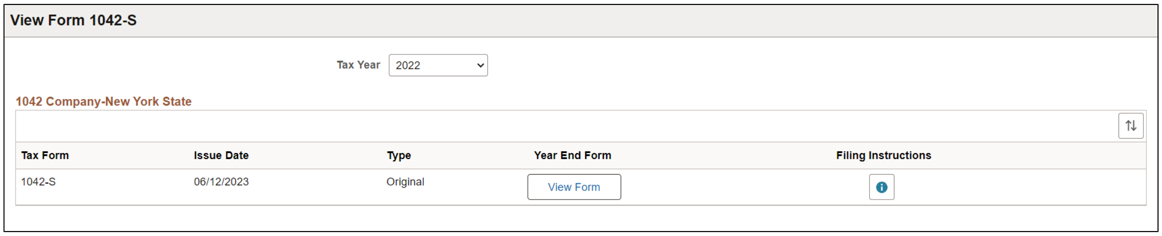
Use the View Form 1042-S page (PY_SS_YENR_FORM_FL) to view 1042-S forms in Employee Self-Service.

Note: Employees can submit or withdraw consent to stop receiving paper 1042-S forms using 1042-S Consent Page.

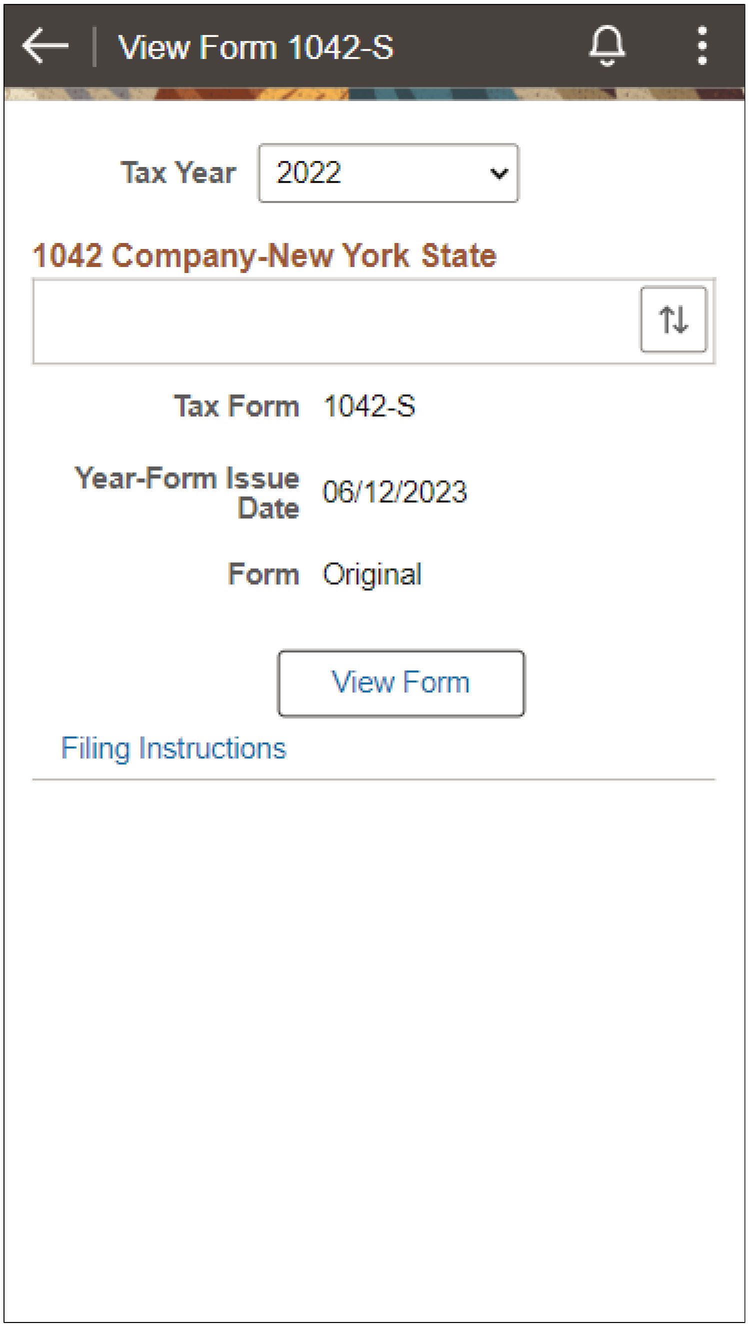
Navigation:

Select the **1042-S Forms** tile from the Payroll Dashboard.

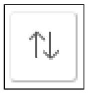
(Desktop) This example illustrates the fields and controls on the View Form 1042-S page,where the employee can view forms electronically after giving the consent.



(Smartphone) This example illustrates the fields and controls on the View Form 1042-S page, viewed from a smartphone.



Important! You can also view the screen reader version (HTML) of year-end forms in standard mode, if the tax form options are selected in the **Fluid HTML View in Standard Mode** section on the “Payroll for NA Installation Page” (PeopleSoft Payroll for North America),
To view the screen reader version of 1042-S form pages, see View <Tax Form or Slip> Page (Screen Reader Mode) and View <Tax Form Name and Year> Page.

Field or Control	***Description***
Tax Year	Select the tax year of the year-end forms you want to view or print. Year-end forms are listed by tax year.
	Sort the list by *Tax Form, Issue Date,* or *Company.* Company will be available in the sort option only if multiple companies are available for the same tax year.
View Form	Select the button to view or print the year-end form in PDF. For employees who have more than one 1042-S, select this button to view tax forms by income code on the View Form 1042-S modal page that appears. **Note:** In screen reader mode, the system displays US forms online on a PeopleSoft page (in HTML) if the corresponding accessibility year-end setup is available for the selected year, in addition to the PDF version. This page will be displayed based on the setup that is defined on the Year End Accessibility Page.
Filing Instructions	Select to view or print the filing instructions of the tax form in PDF.

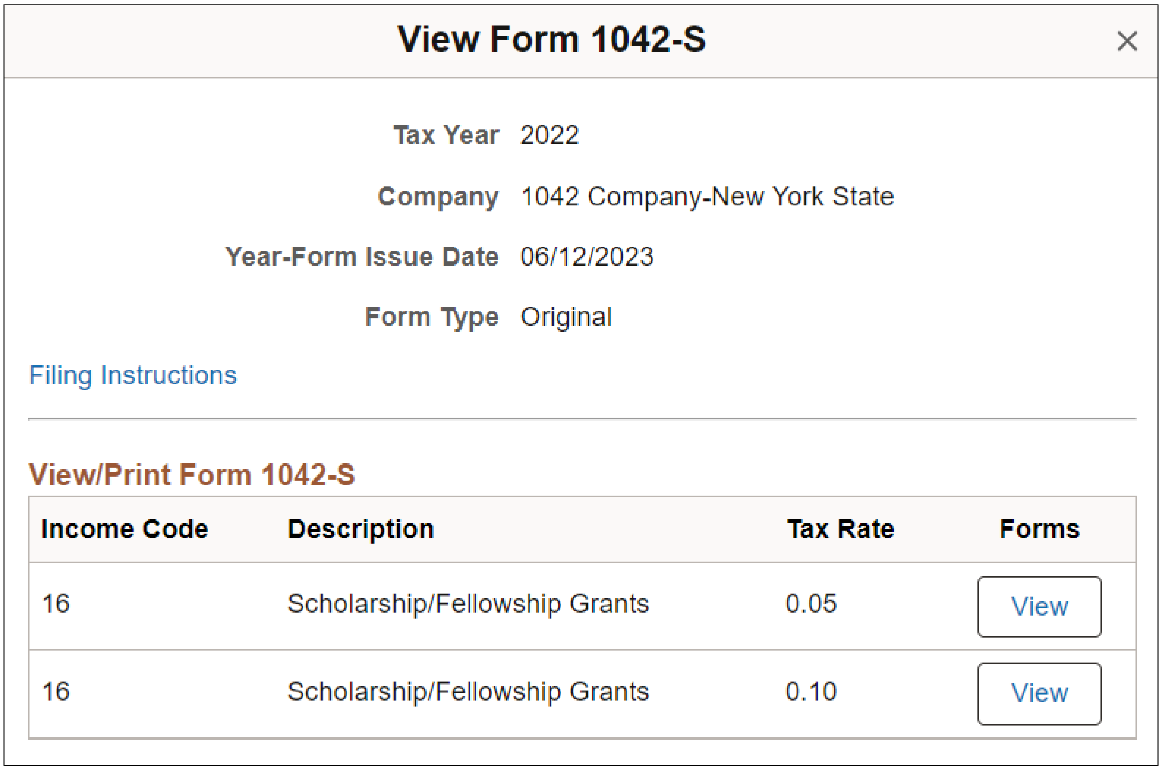
View Form 1042-S Page

Use the View Form 1042-S modal page (PY_SS_YE_NRA_SCF) to select and view 1042-S forms by income code.

Navigation:

Select the **View Form** button on the View Form 1042-S page.

This example illustrates the View Form 1042-S modal page.



This page becomes available if the employee has multiple tax forms of the same issue date and form type.

Field or Control	***Description***
Filing Instructions	Select to view or print the filing instructions of the tax form in PDF.
View	Select the button to view or print the year-end form in PDF.

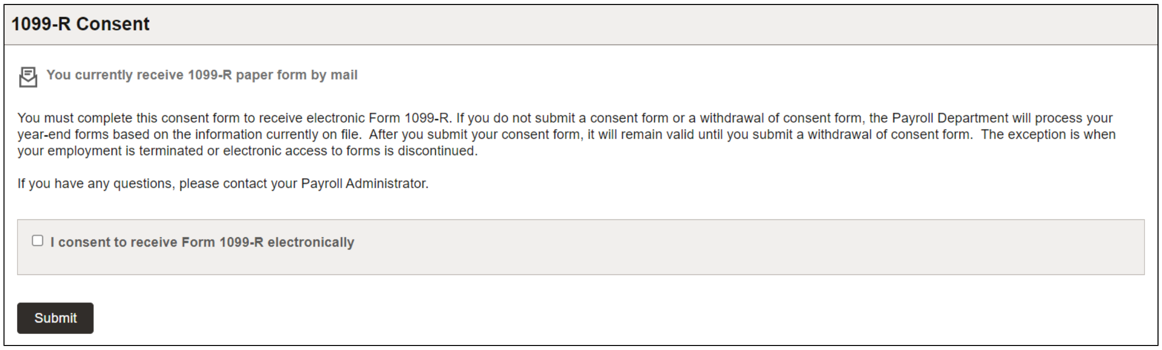
1099-R Consent Page

Use the 1099-R Consent page (PY_1099R_CONS_FL) to submit or withdraw consent to receive electronic Form 1099-R.

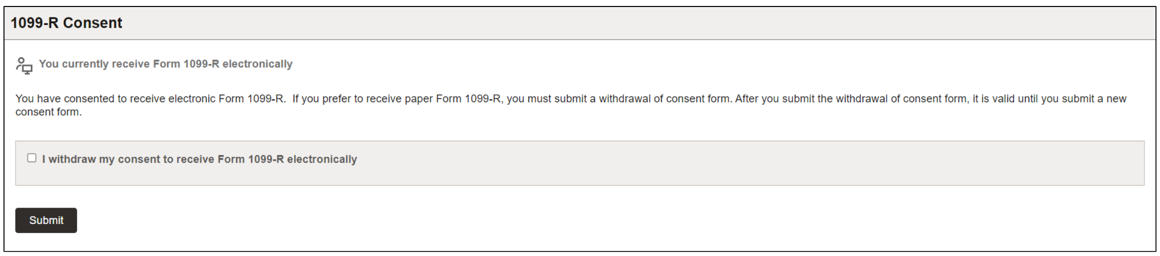
Navigation:

Select the **1099-R Consent** tile from the Payroll Dashboard.

(Desktop) This example illustrates the 1099-R Consent page for employees who are currently receiving paper forms.



This example illustrates the 1099-R Consent page for employees currently receiving electronic forms.



Changing Consent

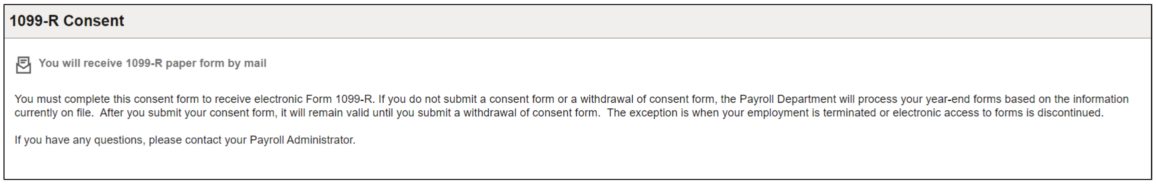
These page elements appear when an employee accesses the page.

Field or Control	***Description***
I consent to receive Form 1099-R 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 Form 1099-R 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 forms.
Submit	Select this button to submit the changes. Enter your login information on the Verify Identity Page that appears for authentication purposes.

Confirmation Information

The 1099-R Consent page displays confirmation information once the employees verify their identity and complete the process of submitting or withdrawing consent.

This example illustrates the 1099-R Consent page after an employee has submitted consent to receive year-end forms in paper form.



View 1099-R Forms Page

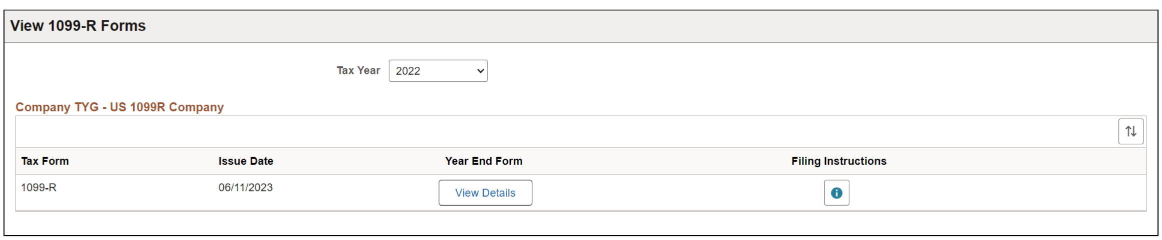
Use the View 1099-R Forms page (PY_SS_1099R_FRM_FL) to view 1099-R forms in Employee Self-Service.

Note: Employees can submit or withdraw consent to stop receiving paper 1099-R forms using 1099-R Consent Page.

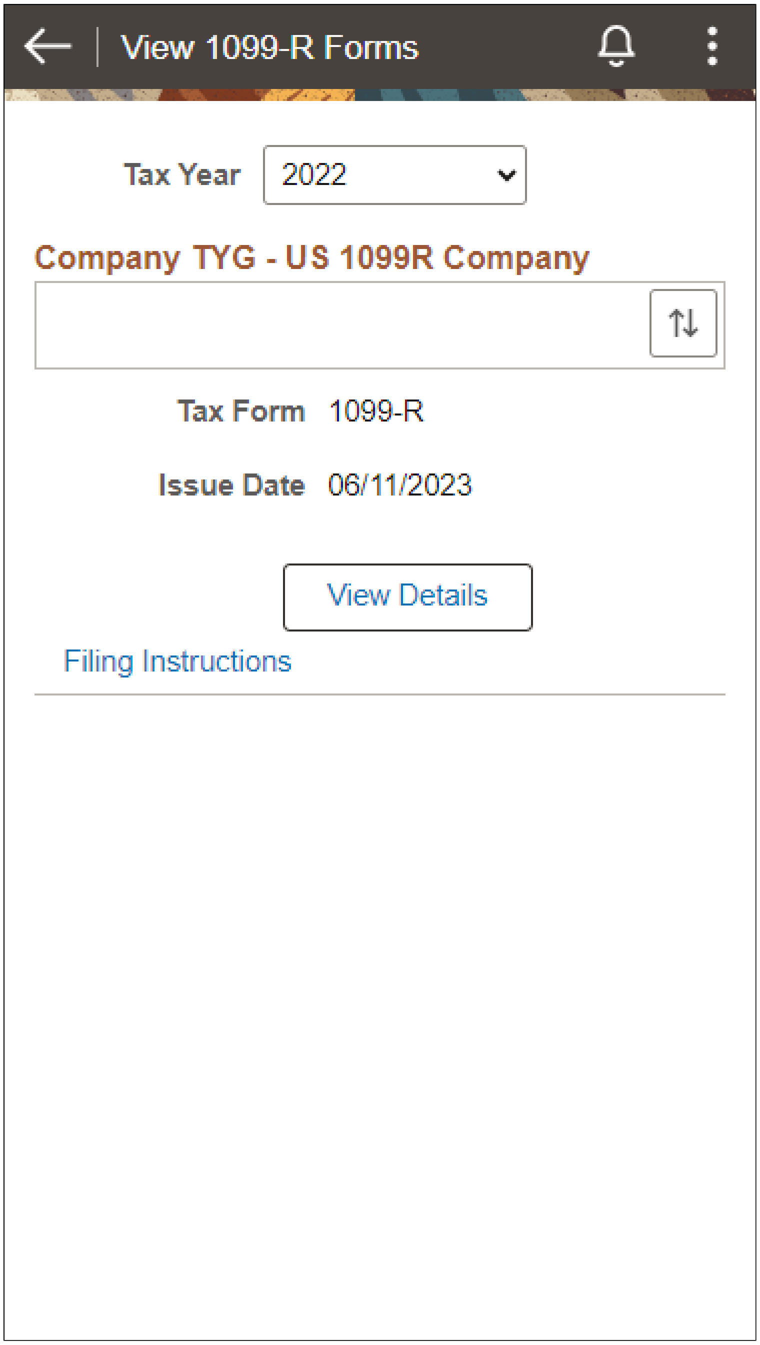
Navigation:

Select the **1099-R Forms** tile from the Payroll Dashboard.

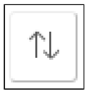
(Desktop) This example illustrates the fields and controls on the View 1099-R Forms page,where the employee can view forms electronically after giving the consent.



(Smartphone) This example illustrates the fields and controls on the View 1099-R Forms page, viewed from a smartphone.



Important! You can also view the screen reader version (HTML) of year-end forms in standard mode, if the tax form options are selected in the **Fluid HTML View in Standard Mode** section on the “Payroll for NA Installation Page” (PeopleSoft Payroll for North America),
To view the screen reader version of 1099-R form pages, see View <Tax Form or Slip> Page (Screen Reader Mode) and View <Tax Form Name and Year> Page.

Field or Control	*Description*
Tax Year	Select the tax year of the year-end forms you want to view or print. Year-end forms are listed by tax year.
	Sort the list by *Tax Form, Issue Date,* or *Company.* Company will be available in the sort option only if multiple companies are available for the same tax year.
View Details	Select the button to view or print the year-end form in PDF. For employees who have more than one 1099-R, select this button to view tax forms by distribution code on the View Form 1099-R modal page that appears. **Note:** In screen reader mode, the system displays US forms online on a PeopleSoft page (in HTML) if the corresponding accessibility year-end setup is available for the selected year, in addition to the PDF version. This page will be displayed based on the setup that is defined on the Year End Accessibility Page.
Filing Instructions	Select to view or print the filing instructions of the tax form in PDF.

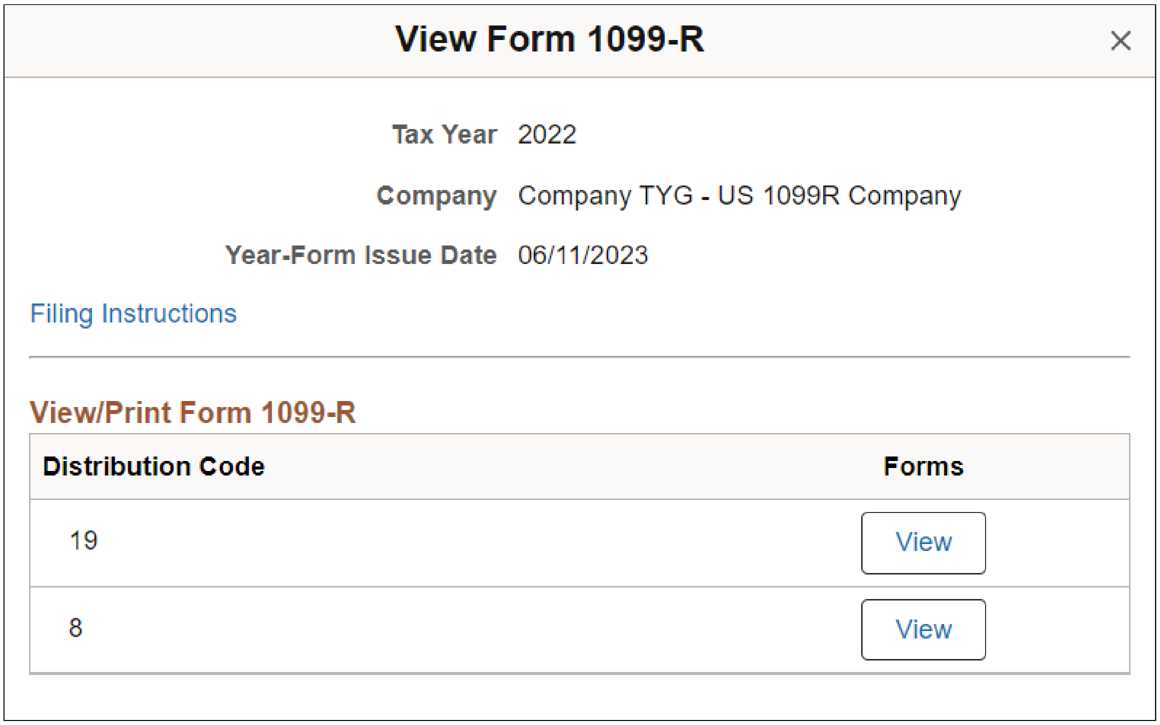
View Form 1099-R Page

Use the View Form 1099-R modal page (PY_SS_1099R_SCF) to select and view 1099-R forms by distribution code.

Navigation:

Select the **View Form** button on the View 1099-R Forms page.

This example illustrates the View Form 1099-R modal page.



This page becomes available if the employee has multiple tax forms of the same issue date.

Field or Control	***Description***
Filing Instructions	Select to view or print the filing instructions of the tax form in PDF.
View	Select the button to view or print the year-end form in PDF.

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

This topic discusses how employees manage consent for electronic year-end slips for Canada in Fluid Employee Self-Service.

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:

Video: Image Highlights, PeopleSoft HCM Update Image 27: 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:

Video: Image Highlights, PeopleSoft HCM Update Image 27: 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 Form Page	PY_T4_CONSENT_FL	Request or withdraw consent to stop receiving paper T4 and T4A slips.
Verify Identity Page	N/A	Authenticate the changes.
View T4/T4A Slips Page	PY_SS_YET4_FORM_FL	View and print T4/T4A slips, listed by tax year.
RL-1/RL-2 Consent Page	PY_RL_CONSENT_FL	Request or withdraw consent to stop receiving paper RL-1 and RL-2 slips.
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 slips 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

Term	***Definition***
NA Payroll Fluid T4 User	This role is required to access the consent form and tax slips for T4/T4A.
NA Payroll Fluid RL User	This role is required to access the consent form and tax slips for RL-1/RL-2.

Form Availability Notification

The system generates notifications when you select the **Availability Notification** button on the Year End Form Options Page, notifying employees that their year-end forms are available for viewing in Employee Self-Service.

Year-End Consent Form Access During PreBoarding

Future hires or rehires can update their consent information on the T4/T4A Consent Form Page and RL-1/RL-2 Consent Page if the options are enabled in the **Future Hire Self Service Access** section of the "Payroll for NA Installation Page" (PeopleSoft Payroll for North America). Future hires can access consent form pages using the "OnBoarding Activities Tile (for Employees)" (PeopleSoft Human Resources Administer Workforce) prior to their hire date, if the step is added to the activity guide template that is used to support the PreBoarding phase of the OnBoarding process.

Viewing Accessible Year-End Slips in Standard Mode

Payroll for North America provides a system-level option that allows all employees to view year-end slip details in HTML without enabling screen reader mode for themselves individually.

If the country-specific option is selected in the **Fluid HTML View in Standard Mode** section of the "Payroll for NA Installation Page" (PeopleSoft Payroll for North America), employees can access year-end slip details and filing instructions through online pages (HTML) in standard mode, in addition to the PDF format. The same functionality is also available when the employee enables screen reader mode on the PeopleSoft signon page or from the **My Preferences** page, irrespective of this option.

If this option is not selected, employees view their slips in PDF when screen reader mode is not enabled.

Video: Image Highlights, PeopleSoft HCM Update Image 44: Year-End Detail Access for All Users in Employee Self-Service

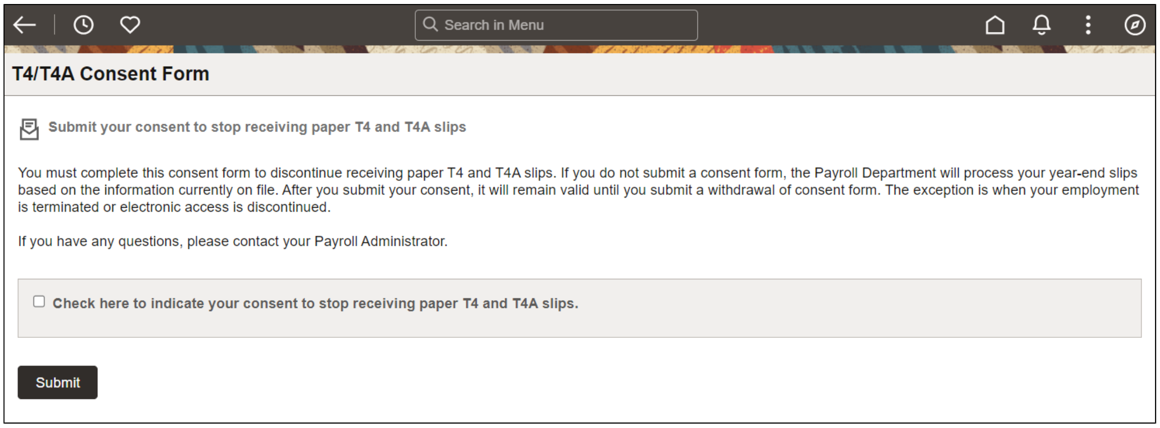
T4/T4A Consent Form Page

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

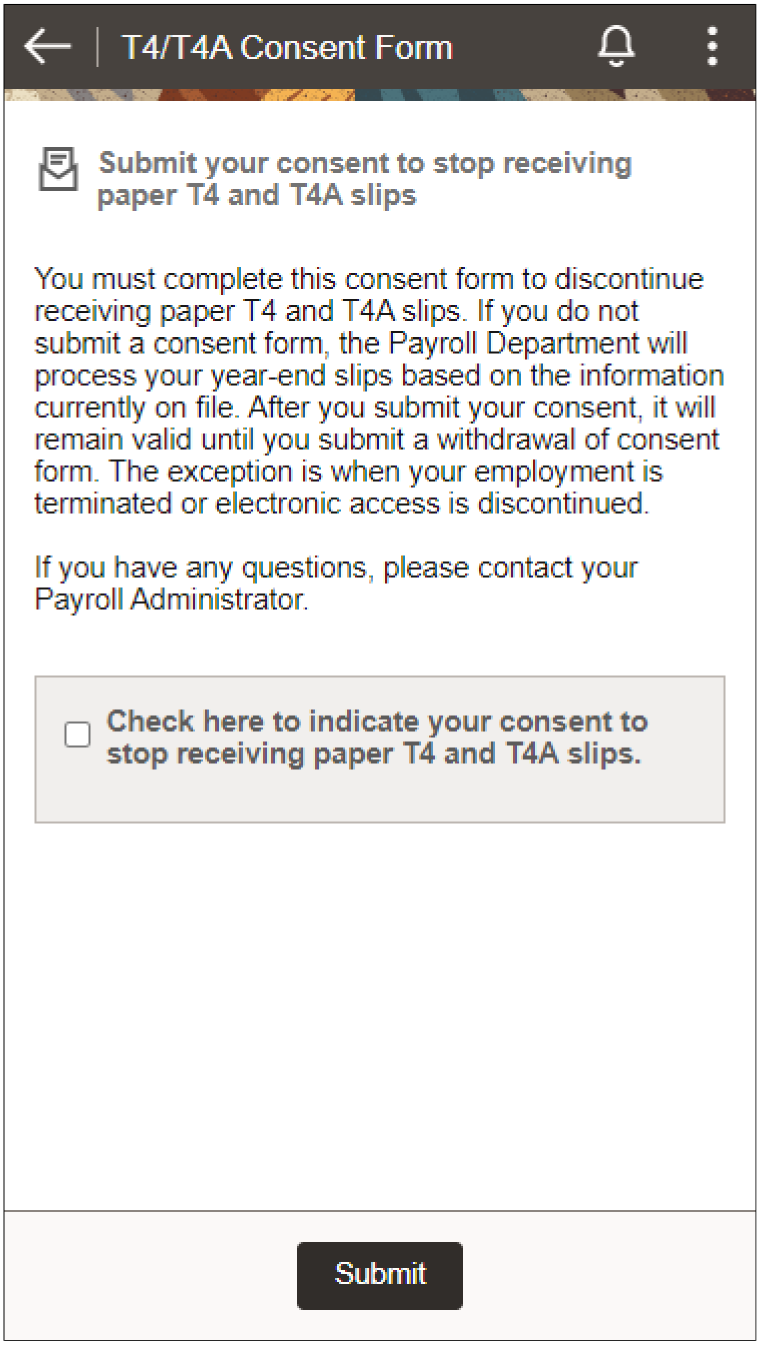
Navigation:

- Click the **T4/T4A Consent** tile from the Payroll Dashboard.
- Click **T4/T4A Consent** from the Fluid Navigation Collection for Payroll.

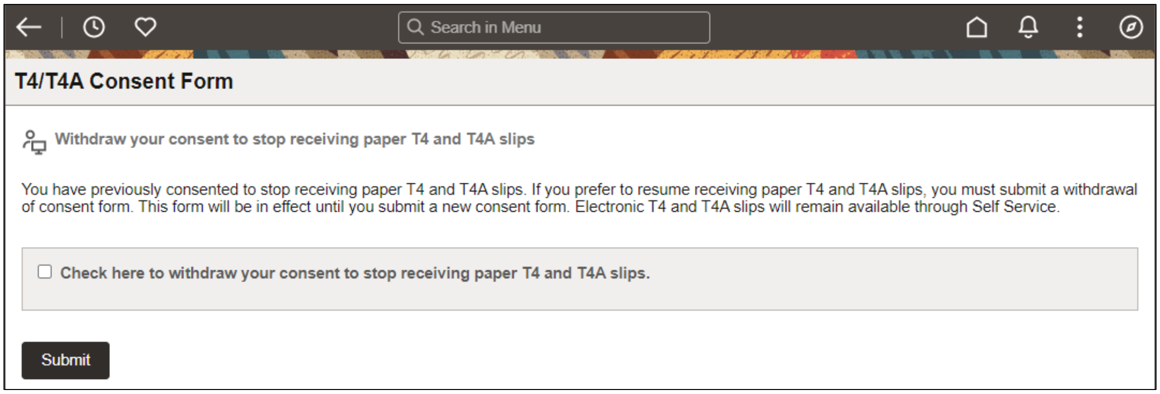
(Desktop) This example illustrates the T4/T4A Consent Form page for employees who are currently receiving paper slips.



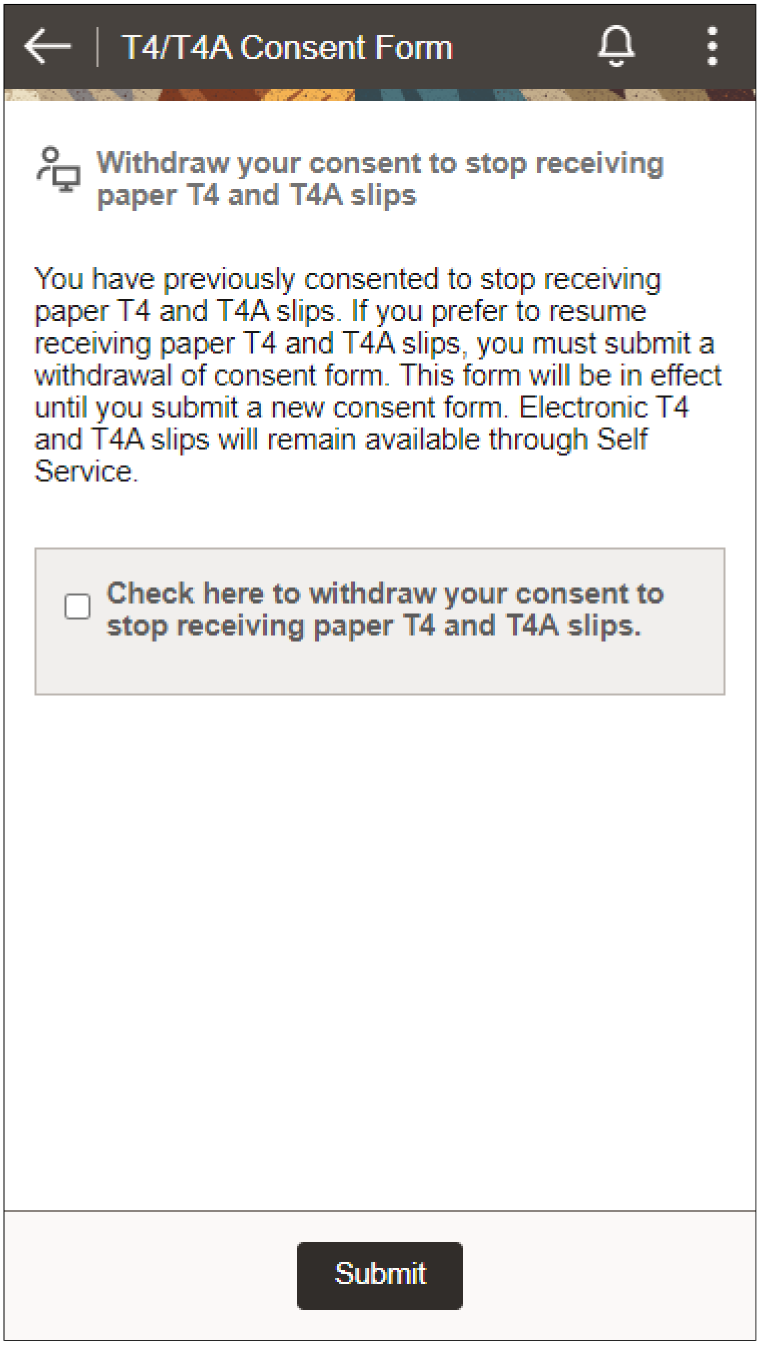
(Smartphone) This example illustrates that T4/T4A Consent Form page for employees who are currently receiving paper slips.



(Desktop) This example illustrates the T4/T4A Consent Form page for employees who are currently receiving electronic slips.



(Smartphone) This example illustrates the T4/T4A Consent Form page for employees currently receiving electronic slips.



Changing Consent

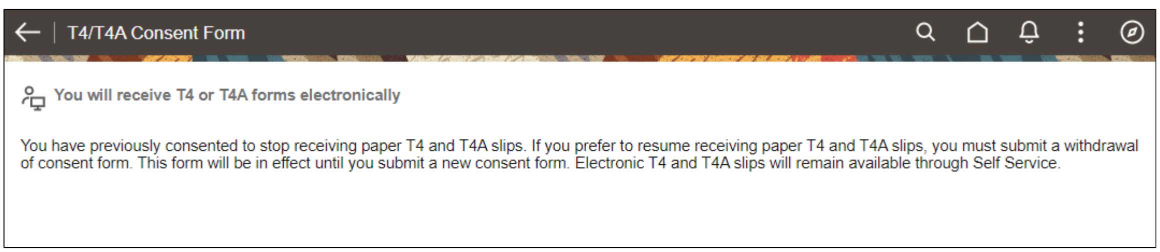
These page elements appear when an employee accesses the page.

Field or Control	*Description*
Check here to indicate your consent to stop receiving paper T4 and T4A slips	This check box appears if the employee currently receives paper slips by mail. The employee selects this box to give consent to 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. Enter your login information on the Verify Identity Page that appears for authentication purposes.

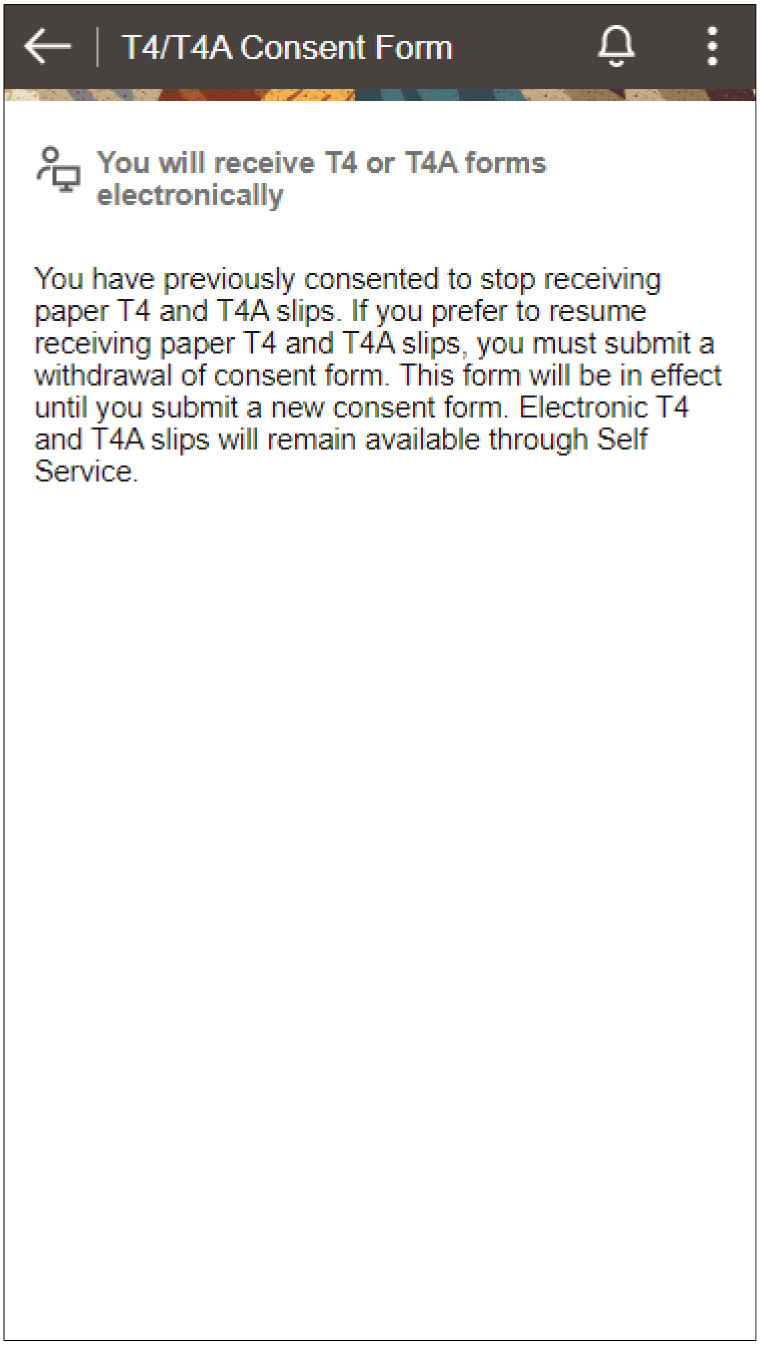
Confirmation Information

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

(Desktop) This example illustrates the T4/T4A Consent Form page after an employee has submitted consent to receive year-end slips electronically.



(Smartphone) This example illustrates the T4/T4A Consent Form page after an employee has submitted consent to receive year-end slips electronically.



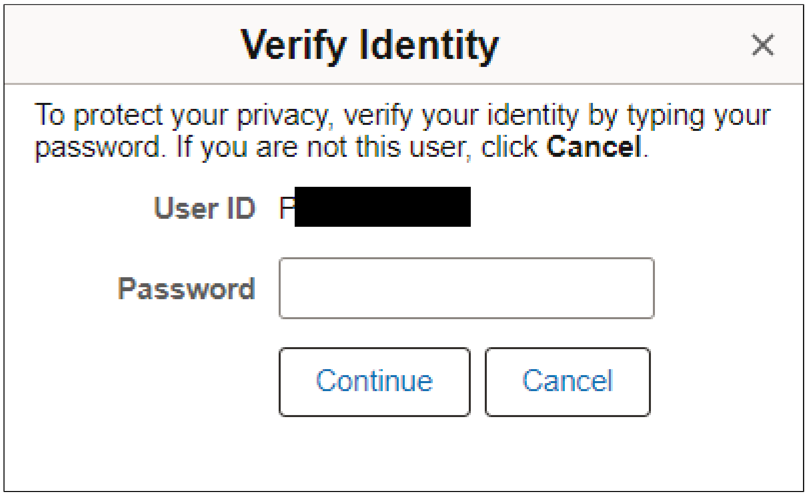
Verify Identity Page

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

Navigation:

Click the **Submit** button on the selected consent 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

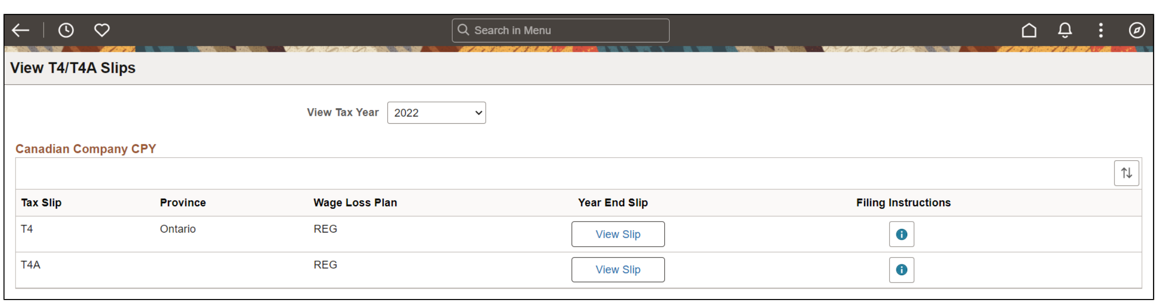
Use the View T4/T4A Slips page (PY_SS_YET4_FORM_FL) to view T4/T4A slips in Employee Self-Service.

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

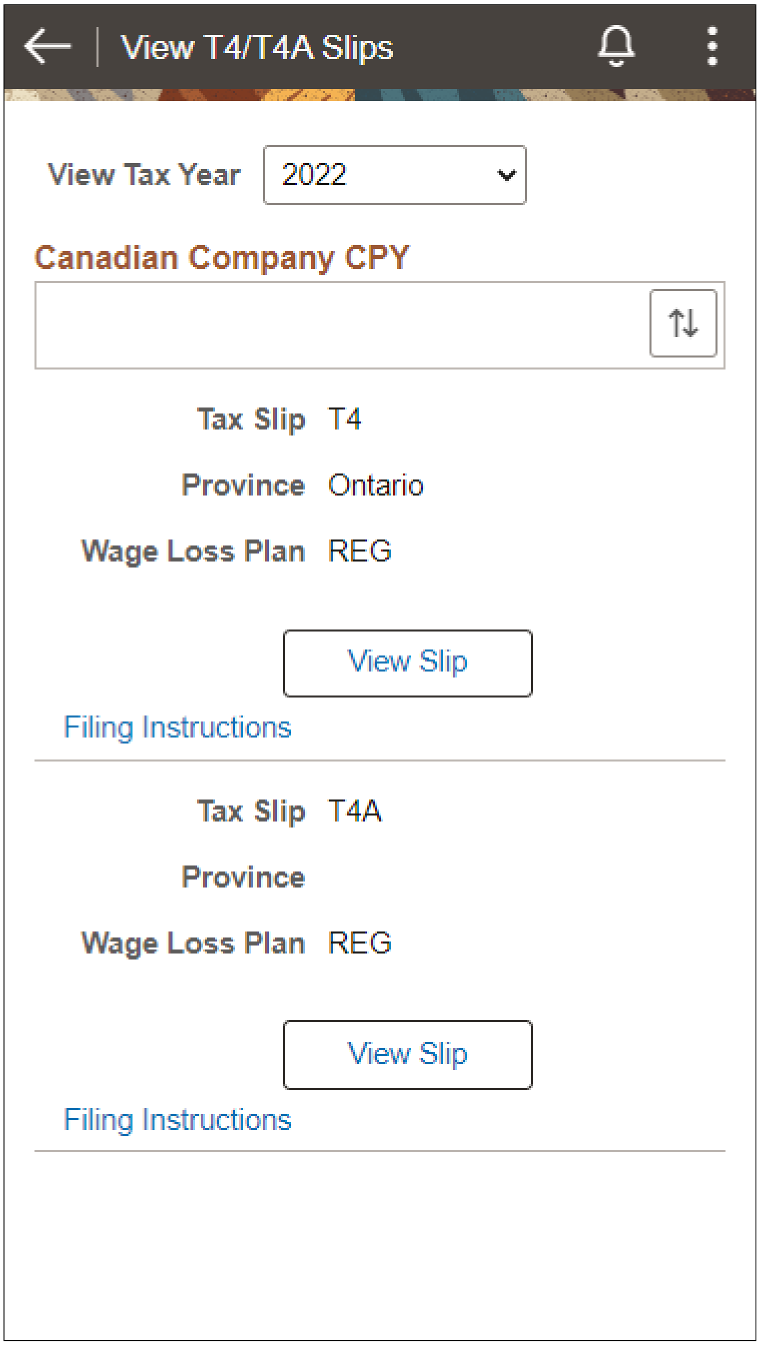
Navigation:

- Click the T4/T4A Slips tile from the Payroll Dashboard.
- Click **View T4/T4A Slips** from the Fluid Navigation Collection for Payroll.

(Desktop) This example illustrates the View T4/T4A Slips page, where the employee can view slips electronically.

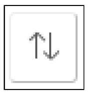


(Smartphone) This example illustrates the fields and controls on the View T4/T4A Slips page.



Employees who are associated with multiple companies can view their company-specific T4/T4A slips on the View T4/T4A Slips page as well.

To view the screen reader version of T4/T4A slip pages, see View <Tax Form or Slip> Page (Screen Reader Mode) and View <Tax Form Name and Year> Page.

Field or Control	***Description***
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 for T4 and 2022 onwards for T4A. 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	Select the button to view or print the year-end slip in PDF.
View Details	Select the button to select and view tax slips on the View <Tax Form Name> Details page by type, such as *Original, Amended, Canceled,* and *Re-Issued.* The button appears for employees with multiple slips for the selected tax year.
Filing Instructions	Select to view or print the filing instructions of the tax slip in PDF.

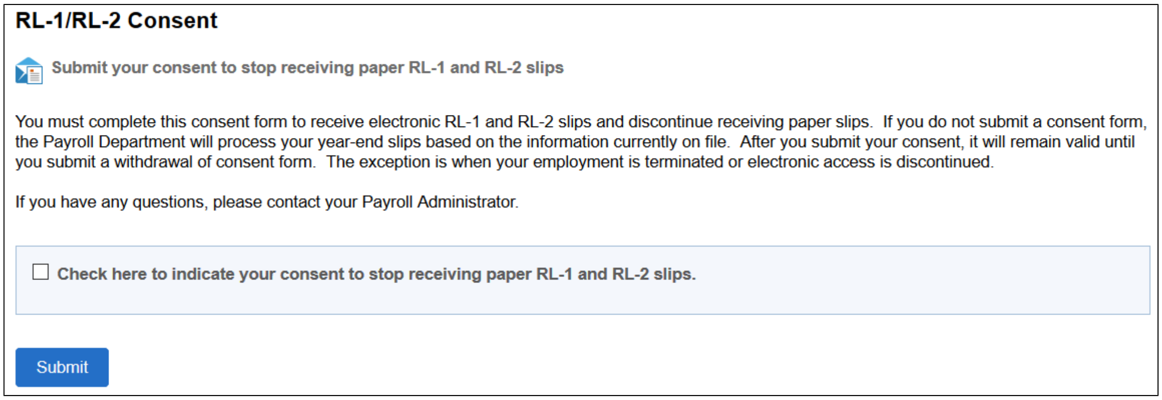
RL-1/RL-2 Consent Page

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:

- Click the **RL-1/RL-2 Consent** tile from the Payroll Dashboard.
- Click **RL-1/RL-2 Consent** from the Fluid Navigation Collection for Payroll.

(Desktop) This example illustrates that RL-1/RL-2 Consent page for employees currently receive paper year-end slips.


RL-1/RL-2 Consent

Submit your consent to stop receiving paper RL-1 and RL-2 slips

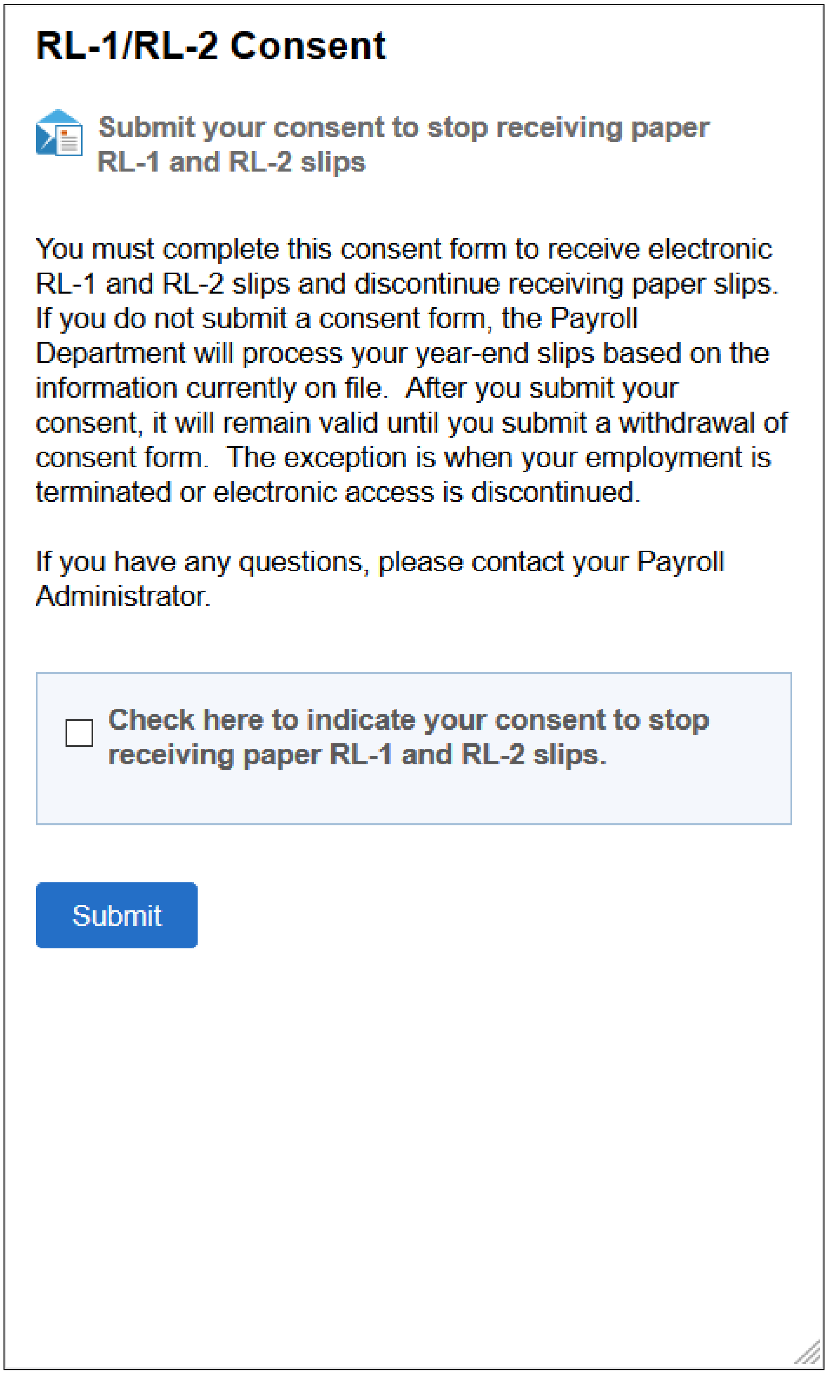
You must complete this consent form to receive electronic RL-1 and RL-2 slips and discontinue receiving paper slips. If you do not submit a consent form, the Payroll Department will process your year-end slips based on the information currently on file. After you submit your consent, it will remain valid until you submit a withdrawal of consent form. The exception is when your employment is terminated or electronic access is discontinued.

If you have any questions, please contact your Payroll Administrator.

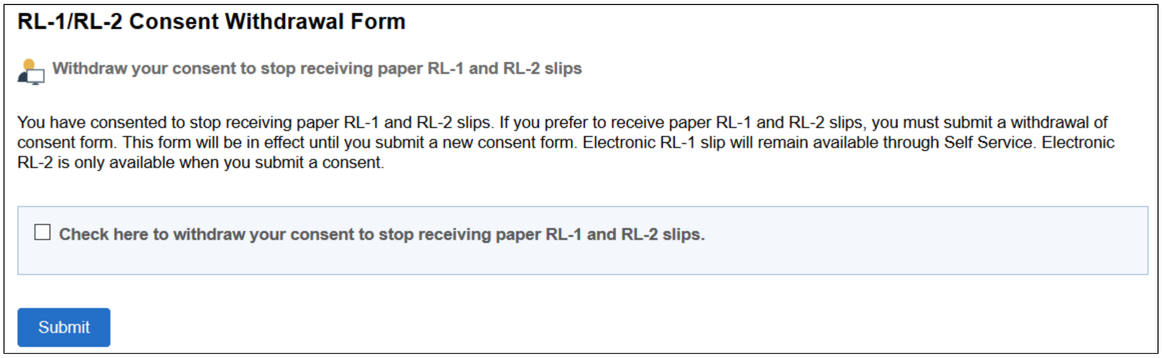
☐ **Check here to indicate your consent to stop receiving paper RL-1 and RL-2 slips.**

Submit

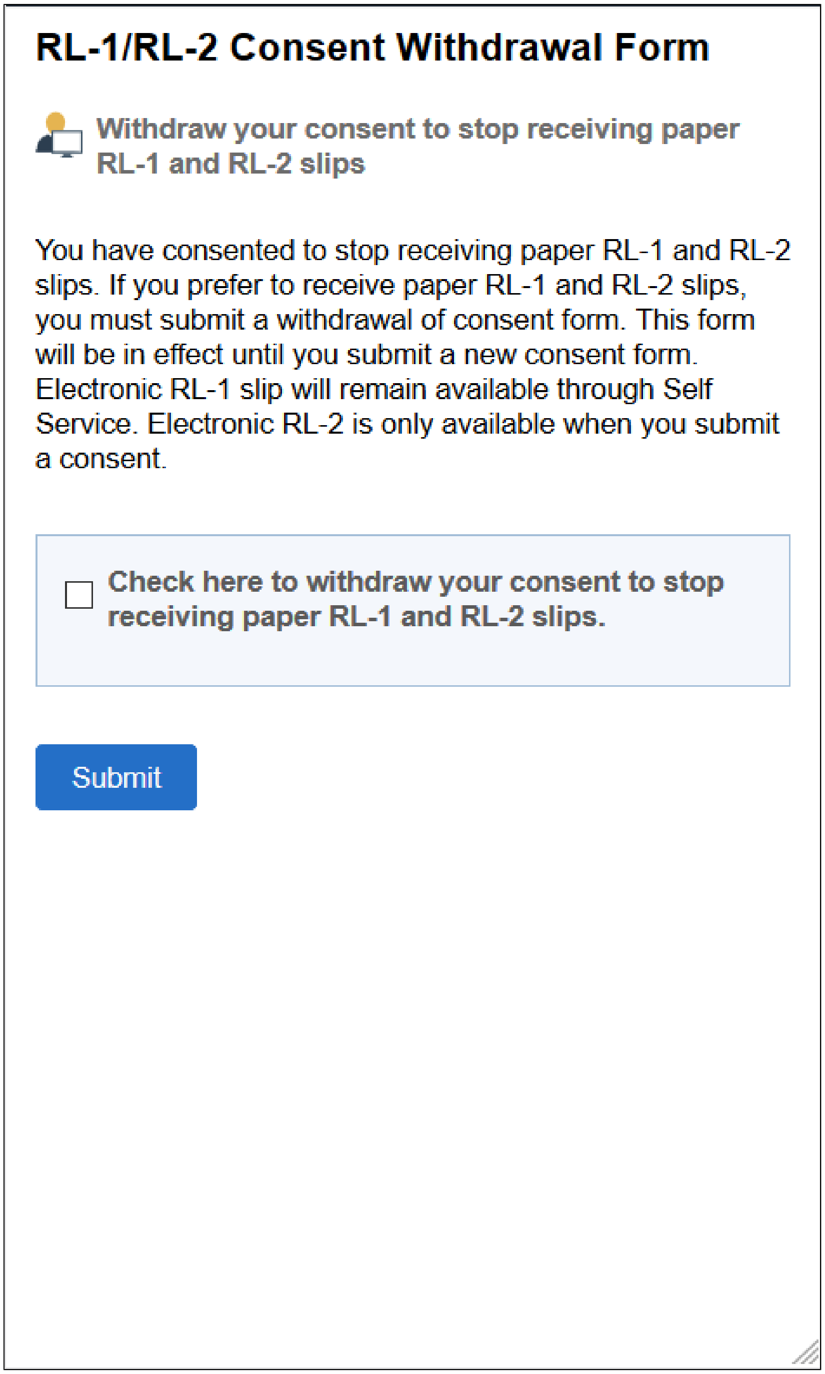
(Smartphone) This example illustrates that RL-1/RL-2 Consent page for employees who currently receive paper year-end slips.



(Desktop) This example illustrates the RL-1/RL-2 Consent Withdrawal Form page for employees who currently receive year-end slips electronically.



(Smartphone) This example illustrates the RL-1/RL-2 Consent Withdrawal Form page for employees who currently receive year-end slips electronically.



Changing Consent

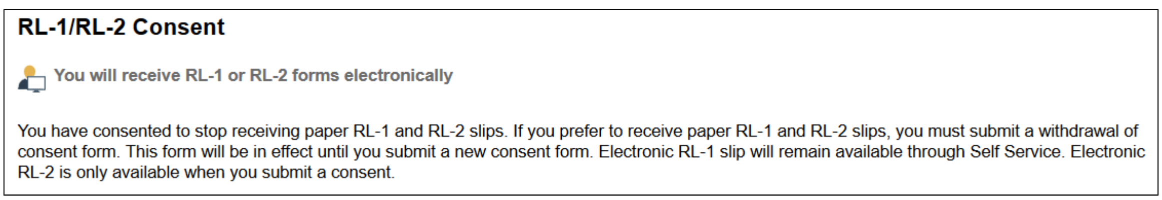
These page elements appear when an employee accesses the page.

Field or Control	***Description***
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 slips by mail. The employee selects this box to submit consent to receive the slips 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. Enter your login information on the Verify Identity Page that appears for authentication purposes.

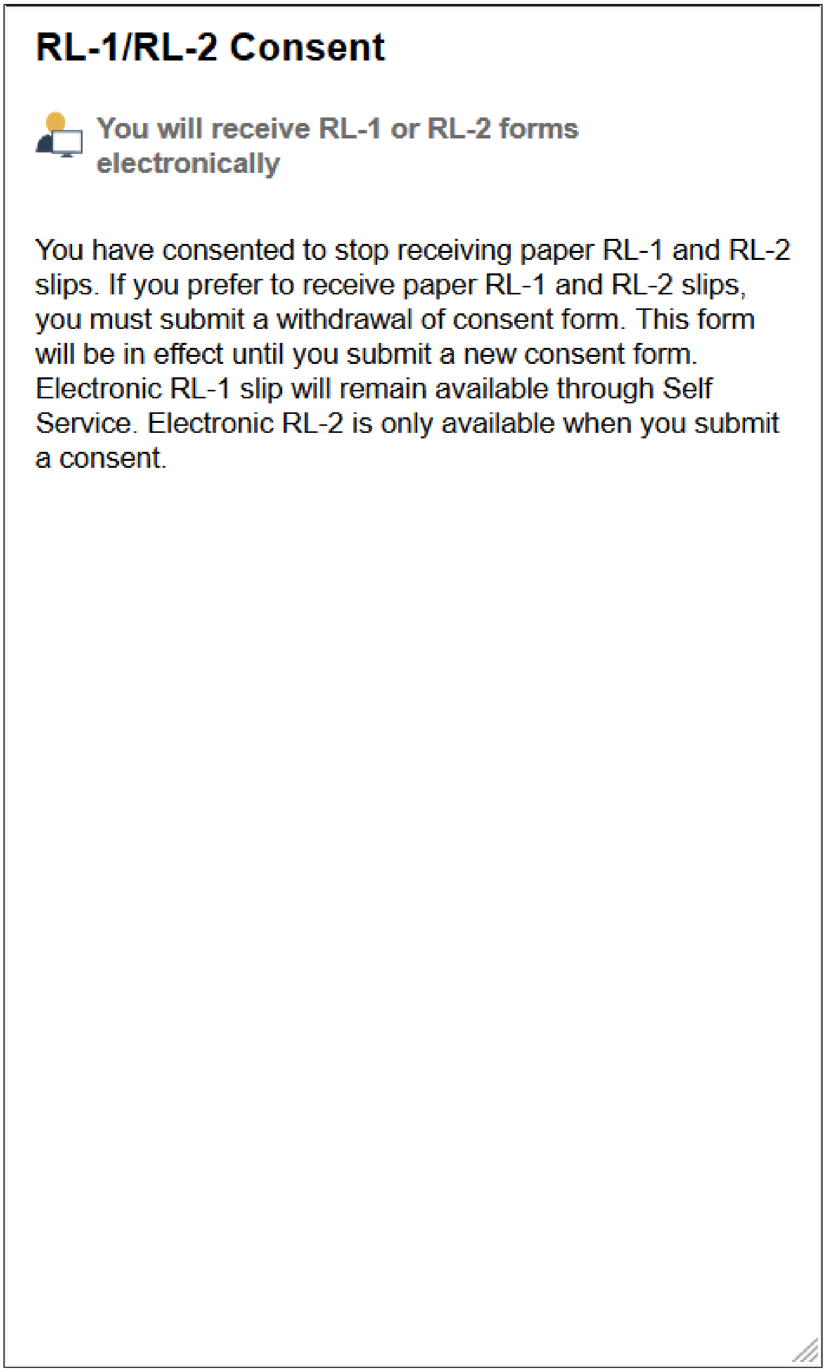
Confirmation Information

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

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



(Smartphone) 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

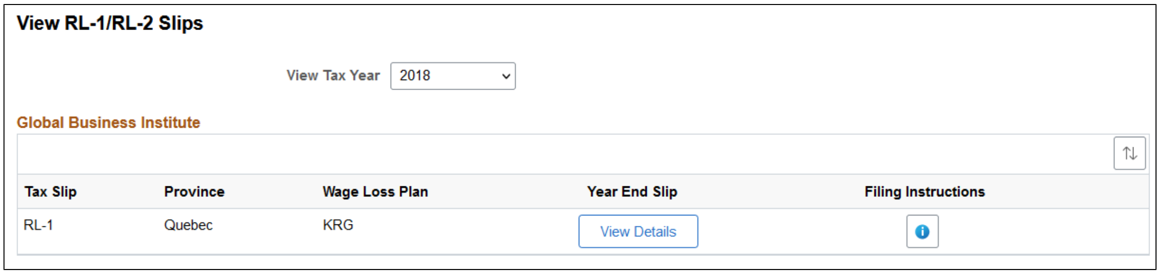
Use the View RL-1/RL-2 Slips page (PY_SS_YE_RL_VW_FL) to view RL-1/RL-2 slips in Employee Self-Service.

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

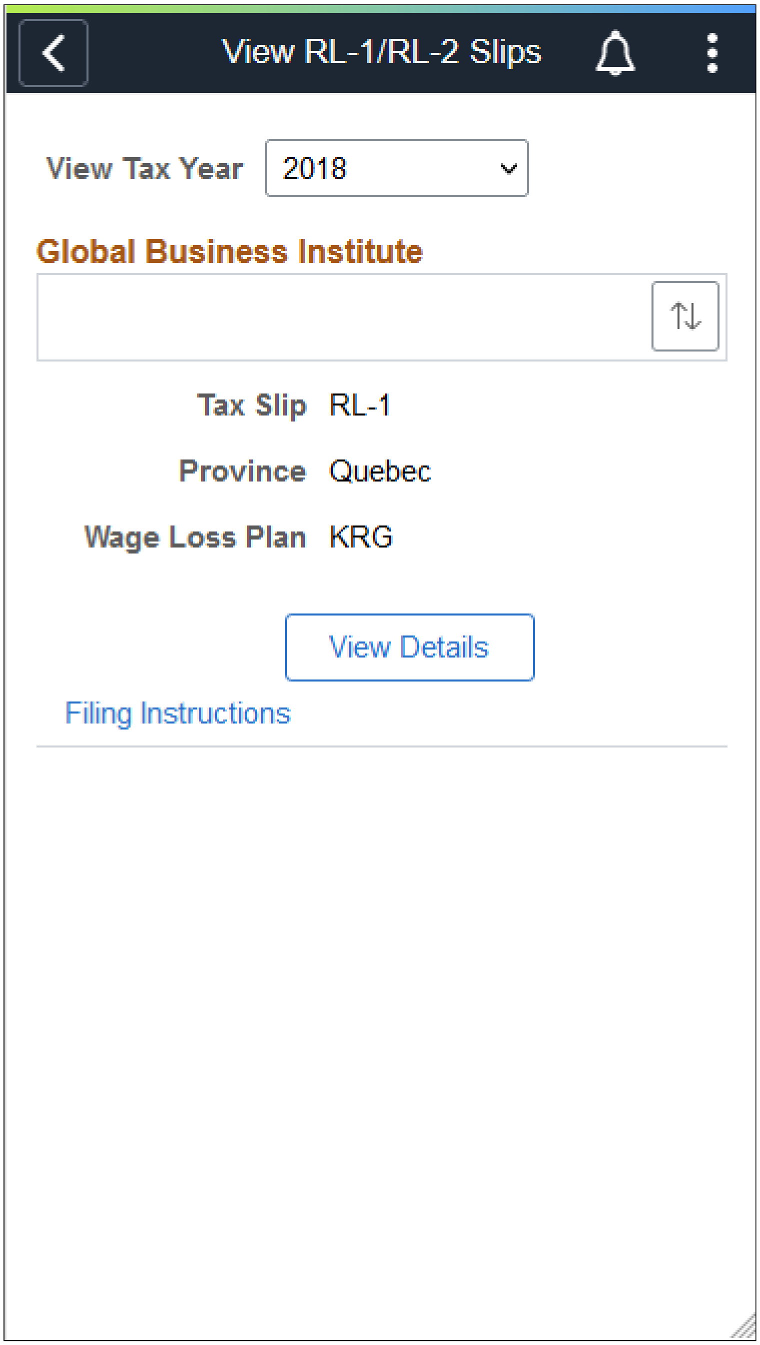
Navigation:

- Click the RL-1/RL-2 Slips tile from the Payroll Dashboard.
- Click **View RL-1/RL-2 Slips** from the Fluid Navigation Collection for Payroll.

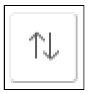
(Desktop) This example illustrates the View RL-1/RL-2 Slips page when the employee has submitted consent to stop receiving paper year-end slips.



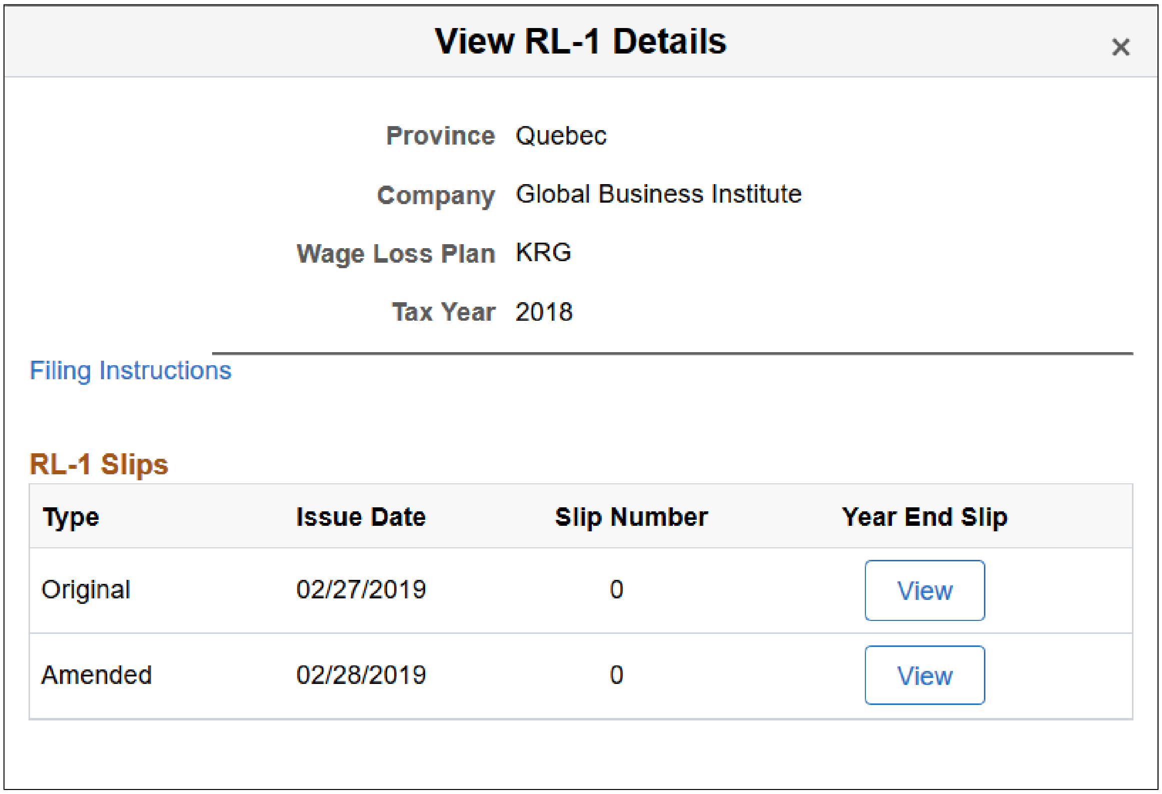
(Smartphone) This example illustrates the fields and controls on the View RL-1/RL-2 Slips page.



To view the screen reader version of RL-1/RL-2 slip pages, see View <Tax Form or Slip> Page (Screen Reader Mode) and View <Tax Form Name and Year> Page.

Field or Control	*Description*
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 or print the year-end slip in PDF. **Note:** In screen reader mode, the system displays Canadian slips online on a PeopleSoft page (in HTML) if the corresponding accessibility year-end setup is available for the selected year, in addition to the PDF version. This page will be displayed based on the setup that is defined on the Year End Accessibility Page.
View Details	Select the button to select and view tax slips on the View <Tax Form Name> Details page by type, such as *Original, Amended, Canceled,* and *Re-Issued.* The button appears for employees with multiple slips for the selected tax year.
Filing Instructions	Select to view or print the filing instructions of the tax slip in PDF.

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



Field or Control	*Description*
Filing Instructions	Select to view or print the filing instructions of the tax slip in PDF.
View	Select the button to view or print the year-end slip in PDF.

Setting Up and Viewing Direct Deposit

Employees can now set up and view direct deposit of funds from their paychecks using Fluid.

Important! Pages listed below are classic self service pages for setting up direct deposit accounts. These page are desupported, which means that while they can still be used, Oracle will no longer provide bug fixes or updates for them. These direct deposit pages are available in Fluid and can be accessed from the Payroll Tile in Employee Self Service.

Pages Used to Set Up and View Direct Deposit

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.
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: This note applies to the classic version of Employee Self Service only.
(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.
(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 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 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 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 Payroll for North America), both in your PeopleSoft Payroll for North America product documentation.

Related Links

“Setting Up Direct Deposits” (PeopleSoft 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 Homepages” (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.

Page Name	***Definition Name***	***Usage***
Direct Deposit Page	PY_IC_RBAL_SEL_FL	Add or assign remaining balance accounts.
Add Account Page	PY_IC_DD_DATA_SCF	Add a new direct deposit account.
Edit Account Page	PY_IC_DD_DATA_SCF	View, update or remove an existing direct deposit account.
Review Existing Accounts Page	PY_DD_ACT_VW_SCF	Review your direct deposit accounts.
Remaining Balance Account Page	PY_IC_DD_RBSEL_SCF	Select an existing account to be the remaining balance 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 (optional)
- Payment method
- Bank and account information
- Deposit type (amount, percent, or remaining balance) and related information

Employees can also edit or remove their 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 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, select 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 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.

Note: Alert functionality is available only for customers who have taken the Fluid Direct Deposit feature.

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 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 Payroll for North America).

Additional Direct Deposit Configuration for Self Service

Refer to the "Direct Deposit Configuration for Self Service" (PeopleSoft Payroll for North America) topic for more information about the setup options that are available for managing direct deposit data in Employee Self Service.

Direct Deposit Access During PreBoarding

Future hires or rehires can add or update their direct deposit information on the Direct Deposit Page if the option is enabled in the **Future Hire Self Service Access** section of the "Payroll for NA Installation Page" (PeopleSoft Payroll for North America). When saving the information, the system uses the date that the information was entered in Employee Self-Service as the effective date of the row. Future hires can access the Direct Deposit page using the "OnBoarding Activities Tile (for Employees)" (PeopleSoft Human Resources Administer Workforce) prior to their hire date, if the step is added to the activity guide template that is used to support the PreBoarding phase of the OnBoarding process.

Direct Deposit Page

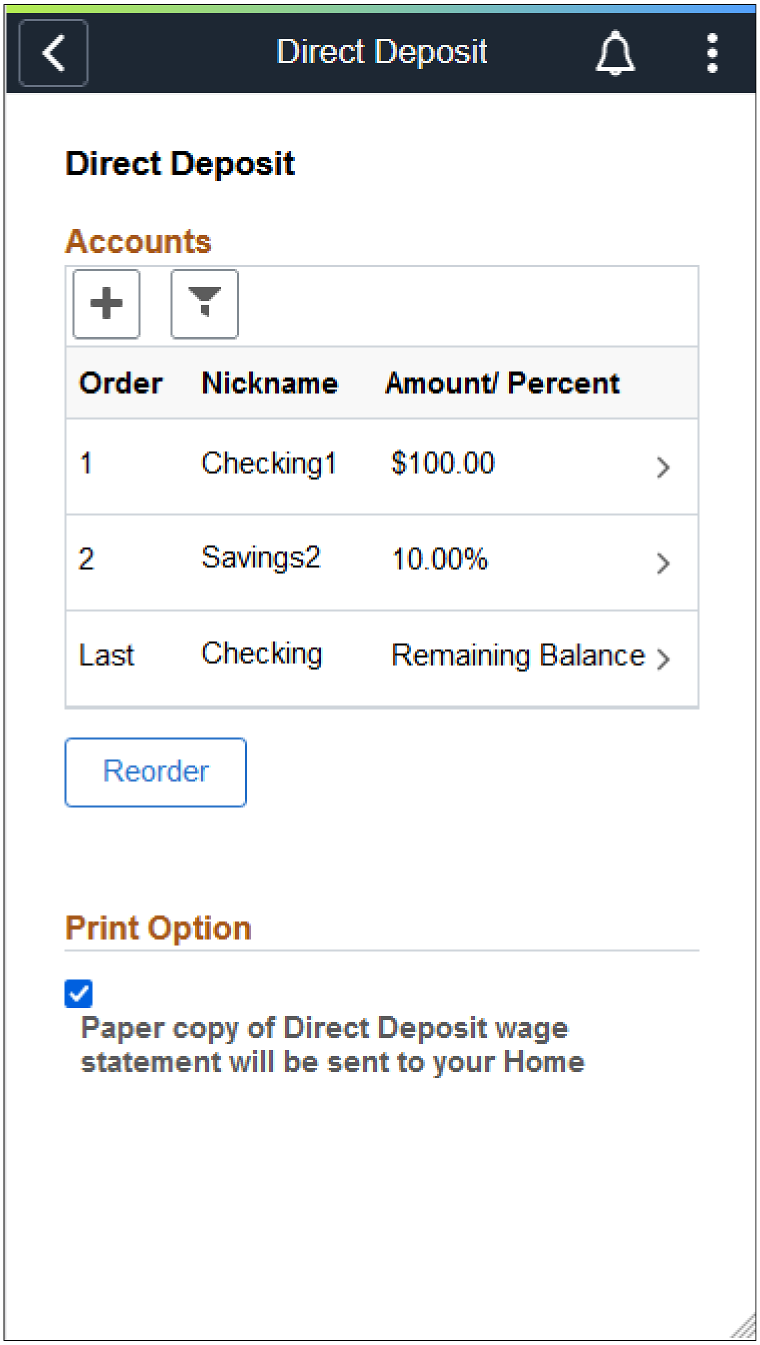
Use the Direct Deposit page (PY_IC_DIR_DEP_FL) to view your current or add new direct deposit information.

Navigation:

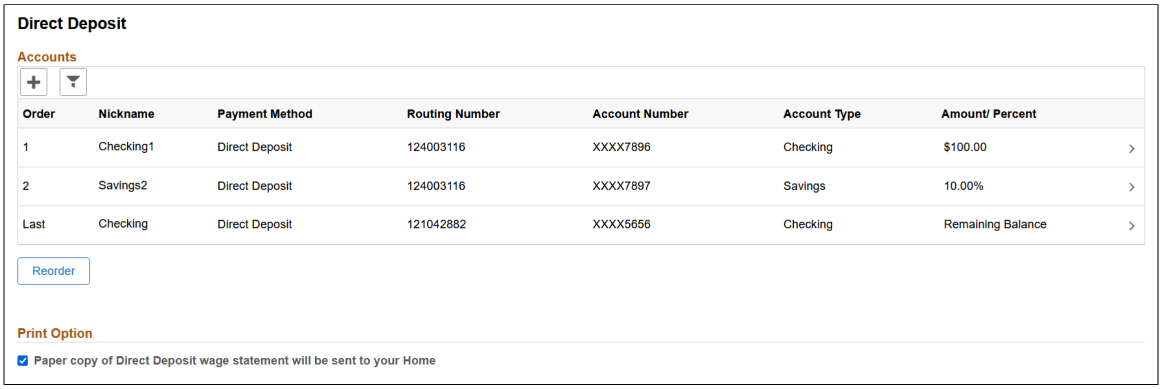
- Select the Direct Deposit tile from the Payroll Dashboard.

- Select **Direct Deposit** from the Fluid Navigation Collection for Payroll.

(Smartphone) This example illustrates the Direct Deposit page.

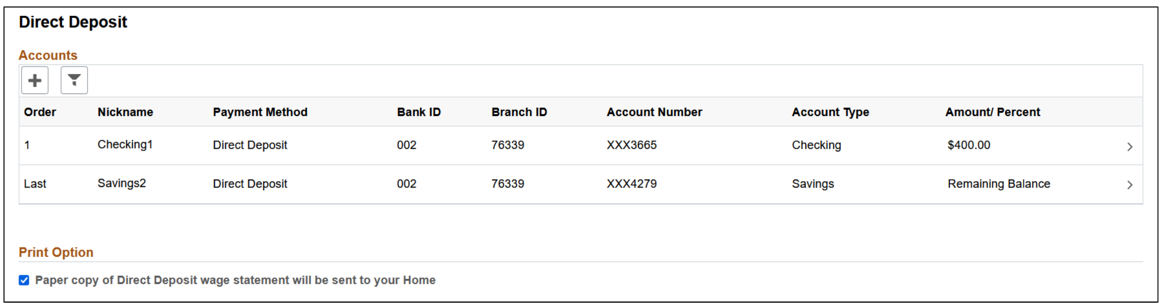


(Desktop) This example illustrates the Direct Deposit page for USA.



Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
1	Checking1	Direct Deposit	124003116	XXXX7896	Checking	$100.00
2	Savings2	Direct Deposit	124003116	XXXX7897	Savings	10.00%
Last	Checking	Direct Deposit	121042882	XXXX5656	Checking	Remaining Balance

(Desktop) This example illustrates the Direct Deposit page for Canada.

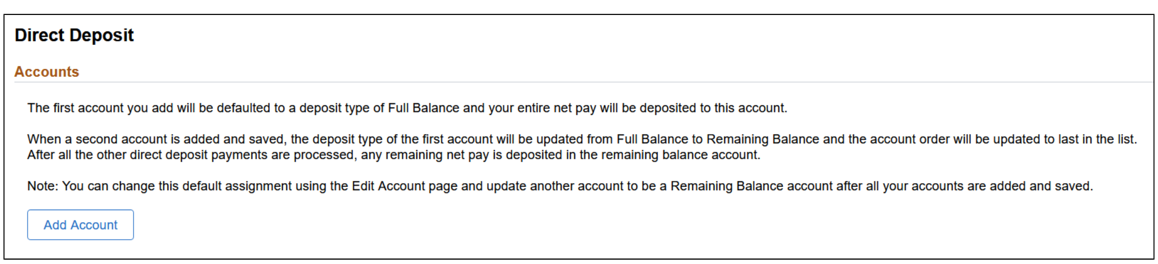


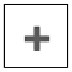
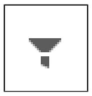
Order	Nickname	Payment Method	Bank ID	Branch ID	Account Number	Account Type	Amount/ Percent
1	Checking1	Direct Deposit	002	76339	XXX3665	Checking	$400.00
Last	Savings2	Direct Deposit	002	76339	XXX4279	Savings	Remaining Balance

From the Direct Deposit page, you can view the list of your existing direct deposit accounts with details. The masking of account numbers is determined by the **Employee Direct Deposit Pages** option on the "Payroll for NA Installation Page" (PeopleSoft Payroll for North America). Select an account row to view more information.

If you do not have any direct deposit setup on file and the system requires a remaining balance account on file from each employee, the system displays a message on the Direct Deposit page as you try to add accounts for the first time. The first account you add receives the full balance of the net pay. When you add a second account, the system automatically updates the first account to be the *Remaining Balance* account and changes its processing order to last in the list.

This example shows the instructional message that is displayed on the Direct Deposit page for employees who are required to have a remaining balance account in the system and are about to add their first direct deposit accounts.



Field or Control	*Description*
 or **Add Account**	Select to add a new direct deposit account.
	Select the filter button to filter records based on the payment method.
Reorder	Select the **Reorder** button to open Reorder Accounts Page. The **Reorder** button appears if there are more than one account with a numeric order number defined on the Direct Deposit page. **Note:** The **Reorder** button will not be available if filter is applied.
Print Option	Select, if applicable, to have a printed copy of the pay statement mailed to your home. Based on the selection, you will receive a confirmation message. The presence of this check box is controlled by the suppress print configuration for the system and the employee. See "Direct Deposit Configuration for Self Service" (PeopleSoft Payroll for North America) for more information.

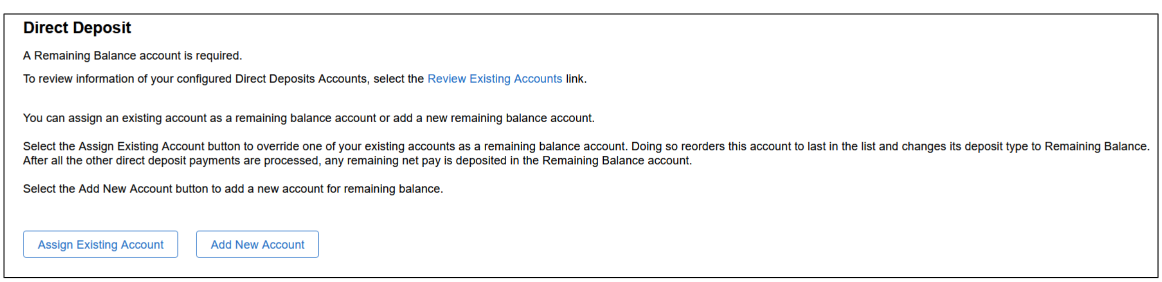
Direct Deposit Page

Use the Direct Deposit page (PY_IC_RBAL_SEL_FL) to add or assign remaining balance accounts.

Navigation:

Select the **Direct Deposit** tile. Remaining balance account is required in the setup and the employee does not have a remaining balance account on file.

This example illustrates the Direct Deposit page from where the employee can add or assign an existing account to be a remaining balance account, as required by the system.



Field or Control	*Description*
Review Existing Accounts	Select to view the list of your direct deposit accounts on the Review Existing Accounts Page.
Assign Existing Account	Select to choose an existing account to be your remaining balance account on the Remaining Balance Account Page. If the **Remove Check as Payment Method in Self Service** option is selected on the “Direct Deposit Controls Page” (PeopleSoft Payroll for North America) and you only have one account on file with *Check* as the payment method, it cannot be used as a remaining balance account. Either create a new remaining balance account or contact the payroll administrator for assistance.
Add New Account	Select to add a remaining balance account on the Add Account Page. The deposit type is set to *Remaining Balance* automatically. When you add an account, the system displays a message when: • The maximum number of accounts allowed by the setup is reached, or • The sum of percentages specified in existing accounts has reached 100%. In either case, you need to assign an existing account to be the remaining balance account. If the **Remove Check as Payment Method in Self Service** option is selected, you cannot create a new account if you only have one account on file with *Check* as the payment method and it has a 100% pay distribution. Contact your payroll administrator for assistance.

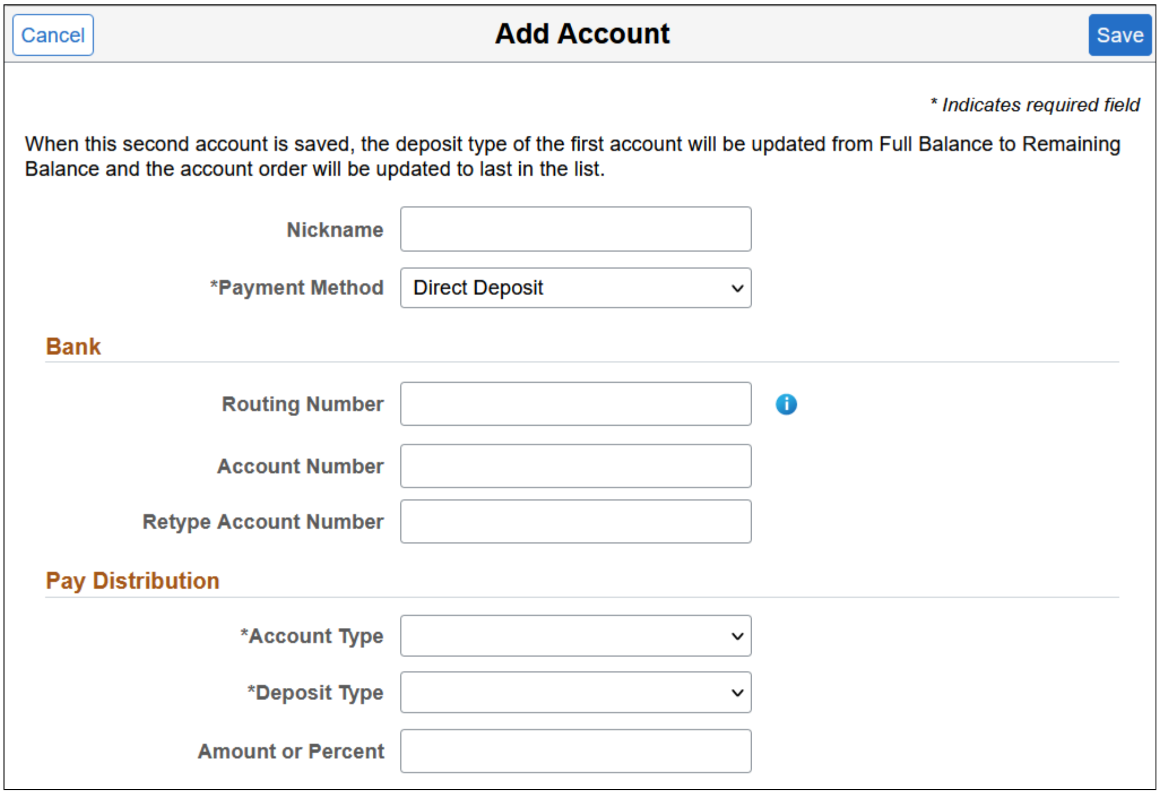
Add Account Page

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

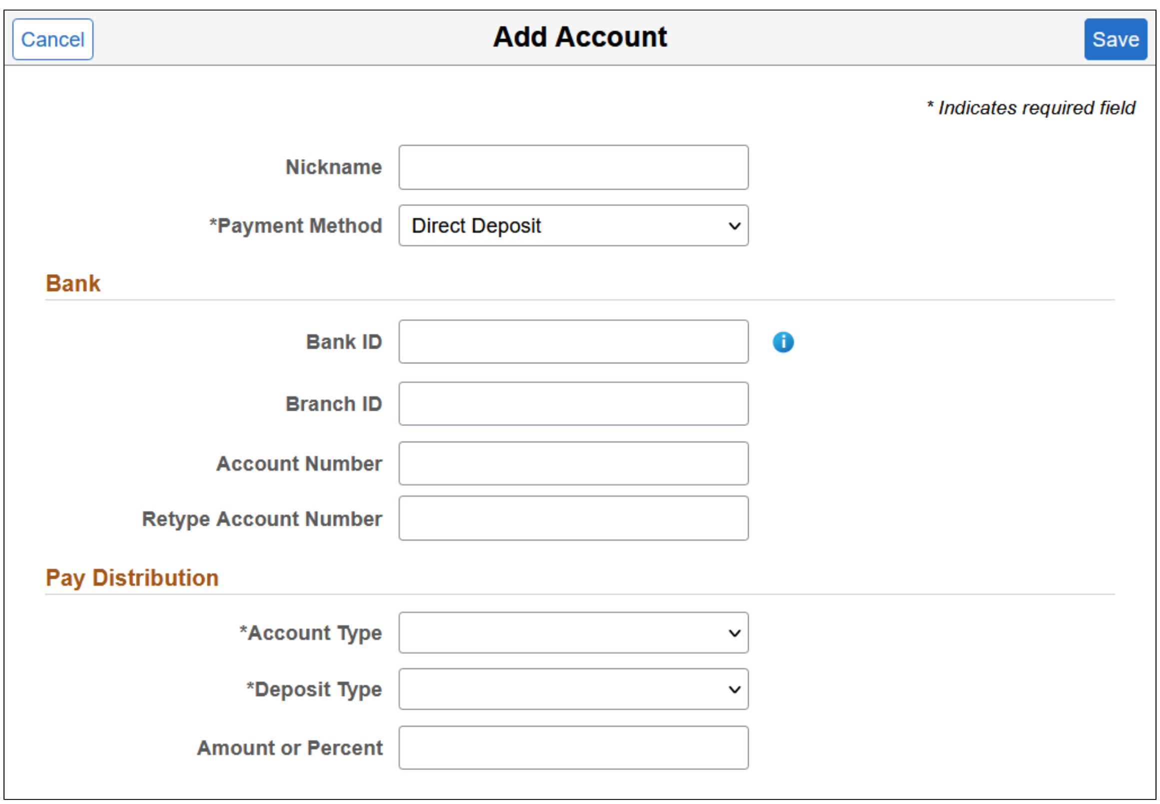
Navigation:

- Select the **Add** button on the Direct Deposit page.
- Select the **Add New Account** button on the Direct Deposit page (PY_IC_RBAL_SEL_FL).

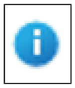
This example illustrates the Add Account page for USA.



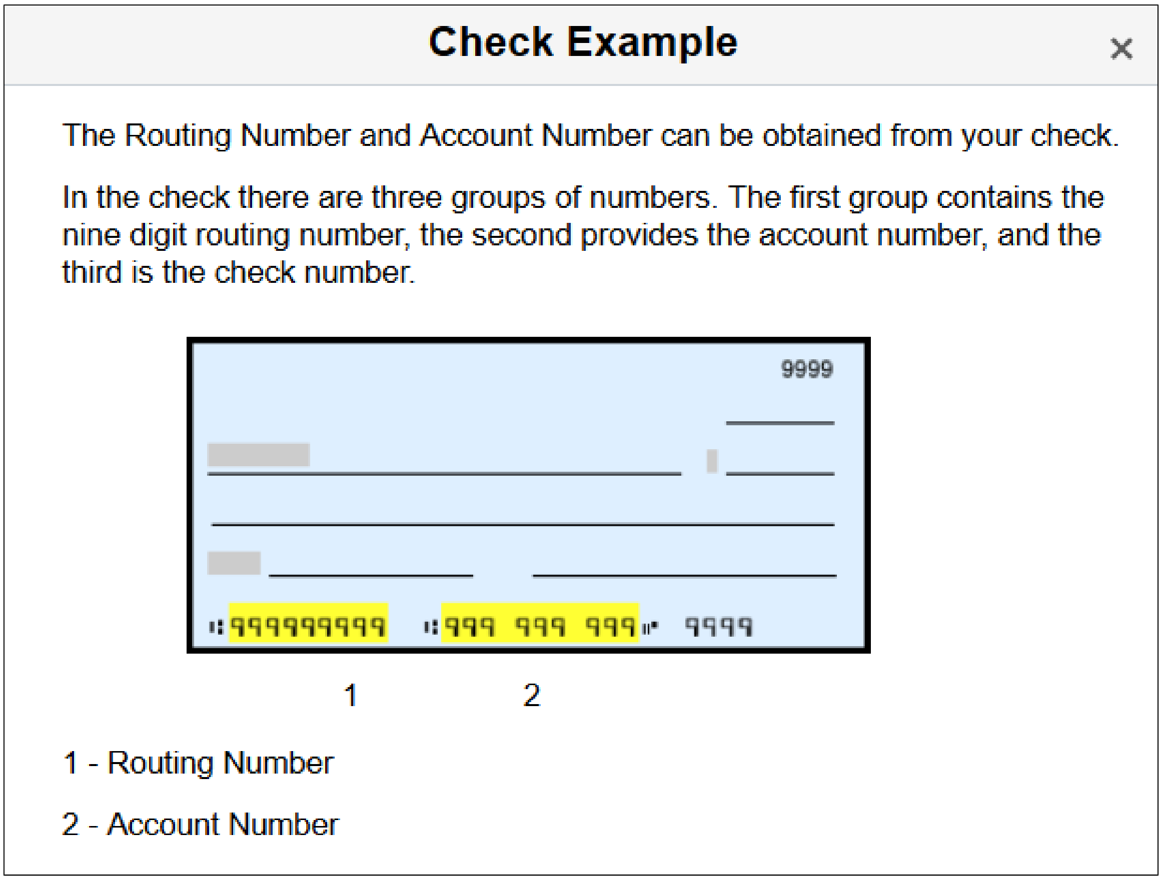
This example illustrates the Add Account page for Canada.



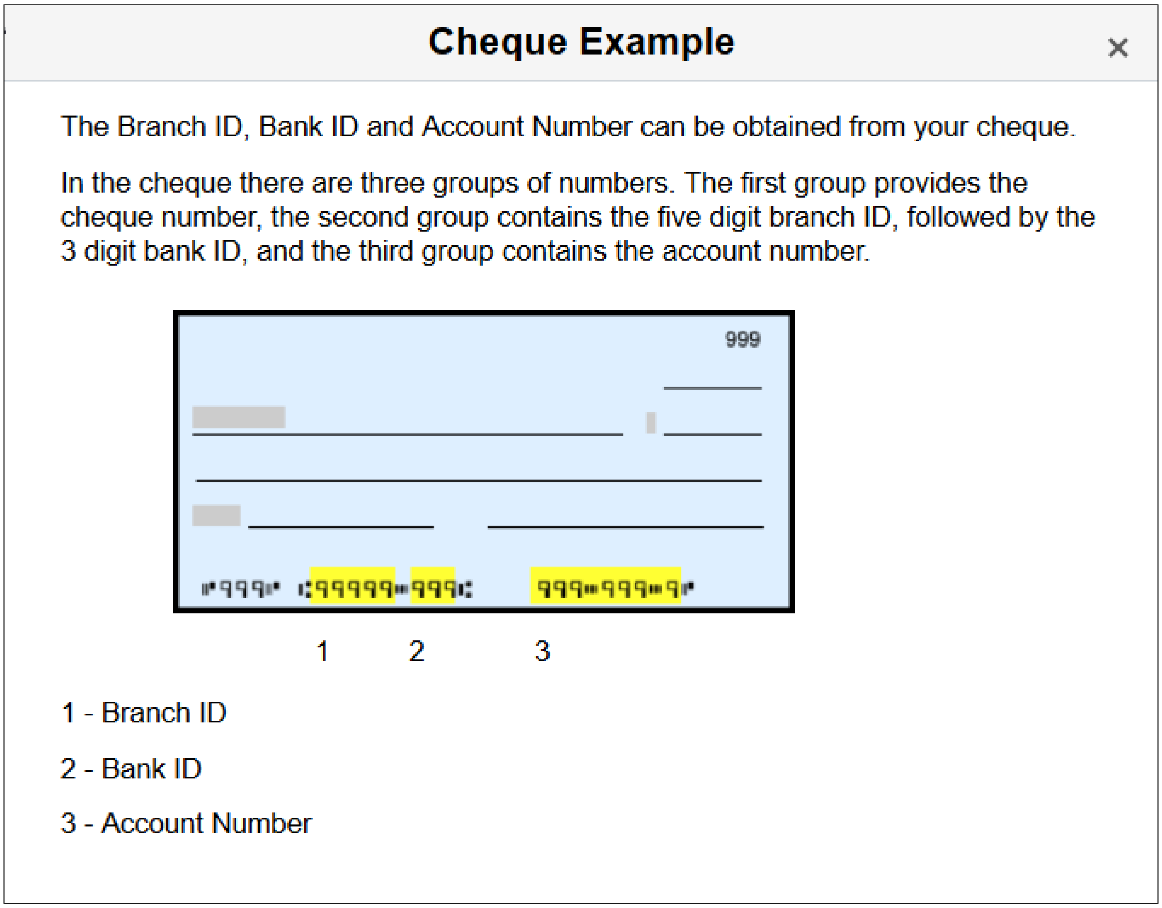
Field or Control	***Description***
Nickname	Enter a unique account name for each direct deposit entry for your reference. If this field is blank when you save the account, the system populates the default nickname using this naming convention: <account type><account's priority on the Request Direct Deposit page>, for example, *Checking1*. For remaining balance accounts, the naming convention is <account type>, for example, *Checking* or *Savings*.
Payment Method	Select the payment method. Valid values are: • *Direct Deposit* (default value) • *Check* or *Cheque* This value becomes unavailable if the **Remove Check as Payment Method** option is selected on the “Direct Deposit Controls Page” (PeopleSoft Payroll for North America). If the selected payment method is *Check* or *Cheque*, the system displays only the **Deposit Type** and **Amount or Percent** fields for you to enter the required information.
Routing Number	Enter the routing number if you have selected *Direct Deposit* as the payment method. Routing number is not applicable if you have selected *Check* as the payment method. **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” (PeopleSoft Payroll for North America) (DIR_DEP_CNTRLS).
Bank ID and **Branch ID**	(CAN) The Bank ID and Branch ID fields appear 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” (PeopleSoft Payroll for North America) (DIR_DEP_CNTRLS).

Field or Control	***Description***
	Select the icon to view the routing number format from a sample check. **Note:** For Canada, the sample cheque with Bank ID format is displayed.

This example illustrates the sample check.



This example illustrates the sample cheque.



Field or Control	***Description***
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

<table>
<tr><th>Field or Control</th><th>Description</th></tr>
<tr><td>Deposit Type</td><td>Select the deposit type if applicable.

This field does not appear if the Require Remaining Balance Account option is enabled and you are adding your first direct deposit account to the system.

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 their 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.

If the Require Remaining Balance Account option is enabled and you do not yet have any account on file, the Remaining Balance value is not available on the Add Account page when you add the first 2 accounts to the system. When you add the first account, the Deposit Type field does not appear on the page. When you add the second account, the Remaining Balance value is not available for selection. However, the system automatically updates the deposit type of the first account to Remaining Balance and its processing order to last in the list.

The system displays Remaining Balance as the default value (not editable) if you select the Add New Account button on the Direct Deposit Page (PY_IC_RBAL_SEL_FL).

Note: If the percent entered is not 100%, and the user has set up an account with the Remaining Balance deposit type, 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.</td></tr>
<tr><td>Amount</td><td>Enter the amount to be deposited in this account type.

Note: This field is available only if you select Amount as the deposit type.</td></tr>
<tr><td>Percent</td><td>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.

If the employee is required to have a remaining balance account, make sure that the sum of the percent values specified for accounts with the Percent deposit type is less than 100%.</td></tr>
</table>

Select Save to create a new direct deposit account using the information provided and view its entry on the Direct Deposit Page.

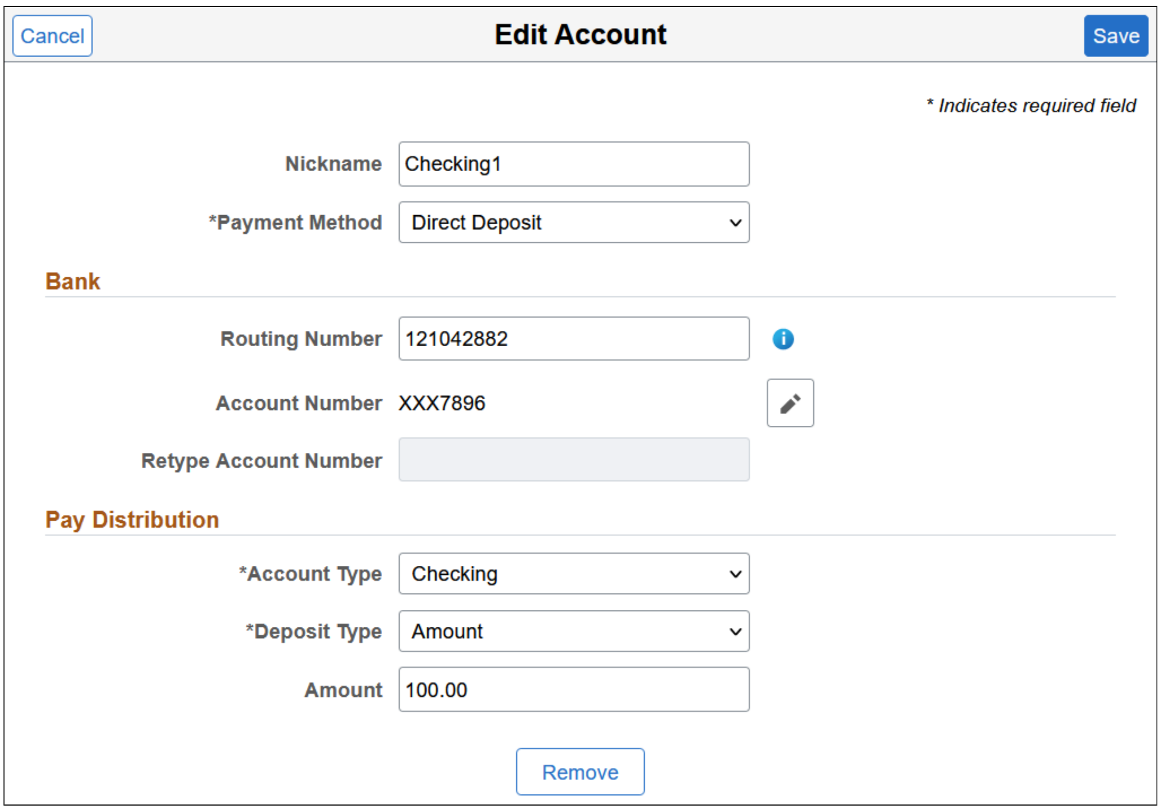
Edit Account Page

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

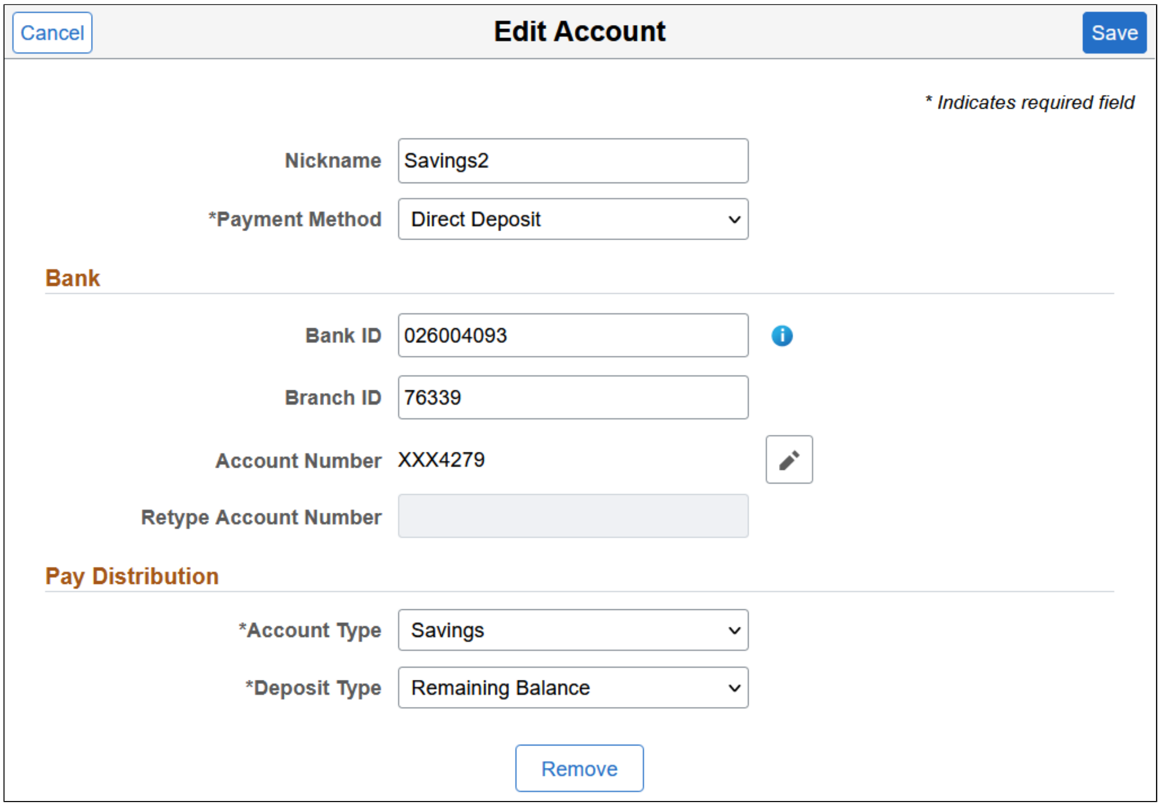
Navigation:

Select a direct deposit account row on the Direct Deposit page.

This example illustrates the Edit Account page for USA.



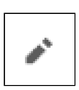
This example illustrates the Edit Account page for Canada.



Use these pages to modify direct deposit details.

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

See Also Add Account Page.

Field or Control	***Description***
	Select the icon to update an existing direct deposit account number. **Note:** If direct deposit account masking is enabled, the system masks all but the last four digits of a direct deposit account number.
Deposit Type	Select to update the deposit type of the account. Values are: *Amount* *Percent* *Remaining Balance*

Field or Control	*Description*
New Remaining Balance Account	Select an existing account to be the new remaining balance account. This field appears if the **Require Remaining Balance Account** option is selected on the “Direct Deposit Controls Page” (PeopleSoft Payroll for North America), and you just changed the deposit type of the current account from *Remaining Balance* to another value. Only accounts with the *Direct Deposit* payment method are available for selection, if the **Remove Check as Payment Method in Self Service** option is selected.
Remove	Use the **Remove** button to remove an existing direct deposit account. If the **Restrict Removal of Last Direct Deposit Account** option is selected on the “Direct Deposit Controls Page” (PeopleSoft Payroll for North America), this button is grayed out for the last account you have with the *Direct Deposit* payment method. **Note:** If the **Require Remaining Balance Account** option is selected on the “Direct Deposit Controls Page” (PeopleSoft Payroll for North America), the system displays a message if you are about to remove an account that is set up to receive remaining funds. You have the option to remove this account and then select an existing account to be the new remaining balance account, or cancel the account deletion. If you decide to remove this account and then select another account to be the new remaining balance account when prompted, the system automatically updates its deposit type to *Remaining Balance* and its processing order to last in the list. If the selected account is the only account on file, its processing order will be changed to *1* and it will receive the full balance of your pay, as shown in its entry on the Direct Deposit Page. **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.

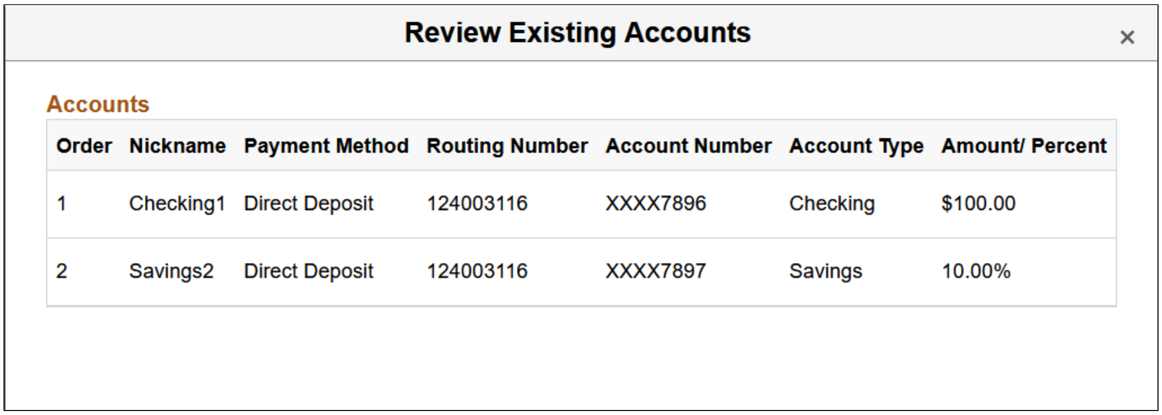
Review Existing Accounts Page

Use the Review Existing Accounts page (PY_DD_ACT_VW_SCF) to review your direct deposit accounts on file.

Navigation:

Select the **Review Existing Accounts** link on the Direct Deposit page (PY_IC_RBAL_SEL_FL).

This example illustrates the Review Existing Accounts page.



Review Existing Accounts

Accounts

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
1	Checking1	Direct Deposit	124003116	XXXX7896	Checking	$100.00
2	Savings2	Direct Deposit	124003116	XXXX7897	Savings	10.00%

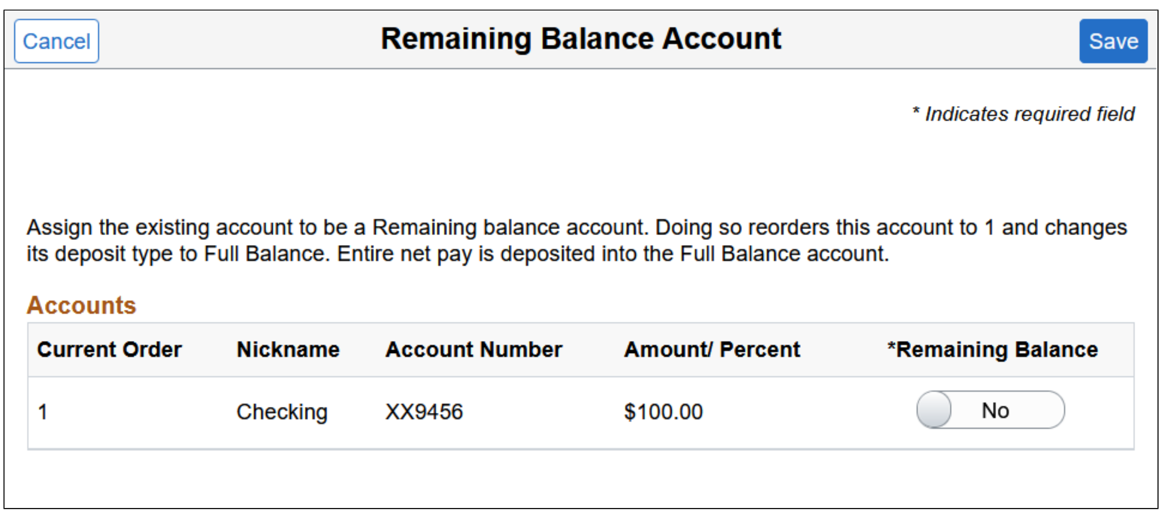
Remaining Balance Account Page

Use the Remaining Balance Account page (PY_IC_DD_RBSEL_SCF) to select an existing account to be the remaining balance account.

Navigation:

Select the **Assign Existing Account** button on the Direct Deposit page (PY_IC_RBAL_SEL_FL).

This example illustrates the Remaining Balance Account page.



Cancel Remaining Balance Account Save

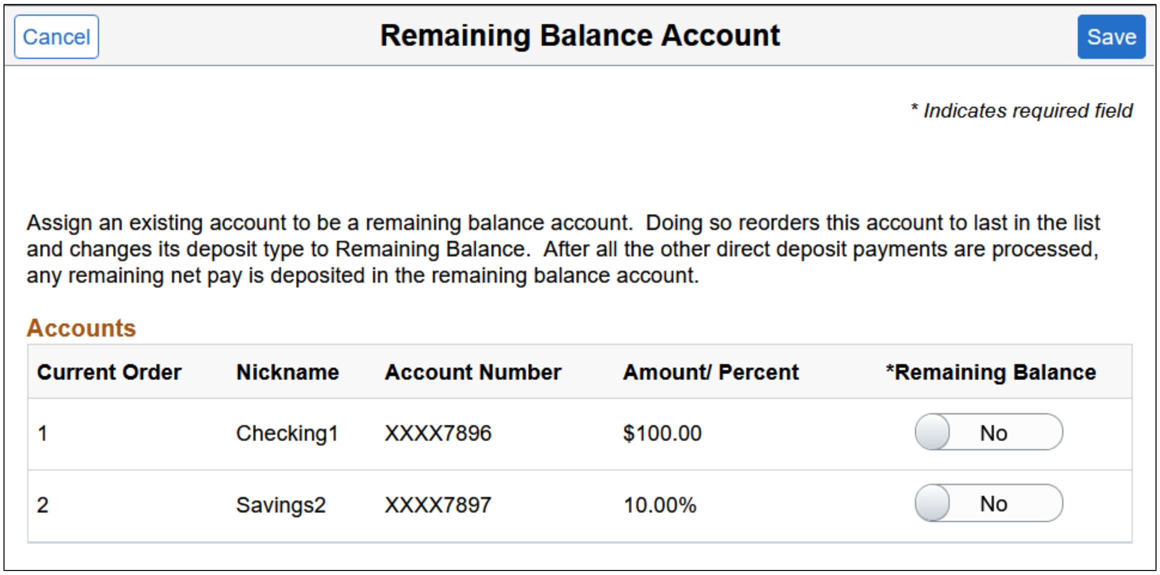
** Indicates required field*

Assign the existing account to be a Remaining balance account. Doing so reorders this account to 1 and changes its deposit type to Full Balance. Entire net pay is deposited into the Full Balance account.

Accounts

Current Order	Nickname	Account Number	Amount/ Percent	*Remaining Balance
1	Checking	XX9456	$100.00	No

This example illustrates the Remaining Balance Account page in which you can select one of the existing accounts on file to be the remaining balance account.



Field or Control	***Description***
Remaining Balance	Select *Yes* to change the corresponding account to be your remaining balance account. If multiple accounts exist on file, the new remaining balance account is reordered to last in the list. Only one remaining balance account is required for each employee.

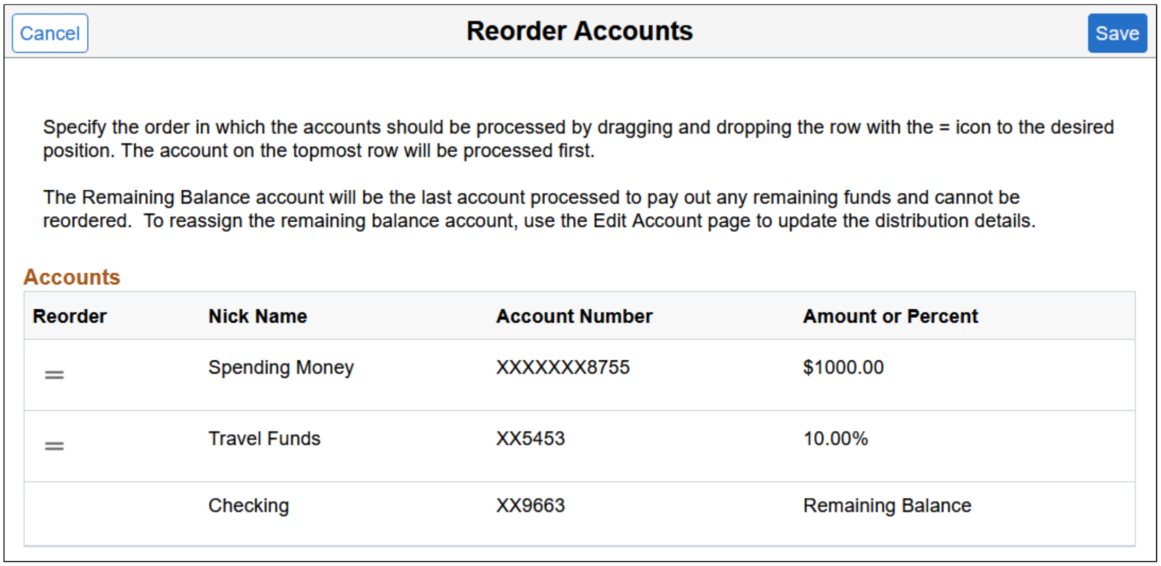
Reorder Accounts Page

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

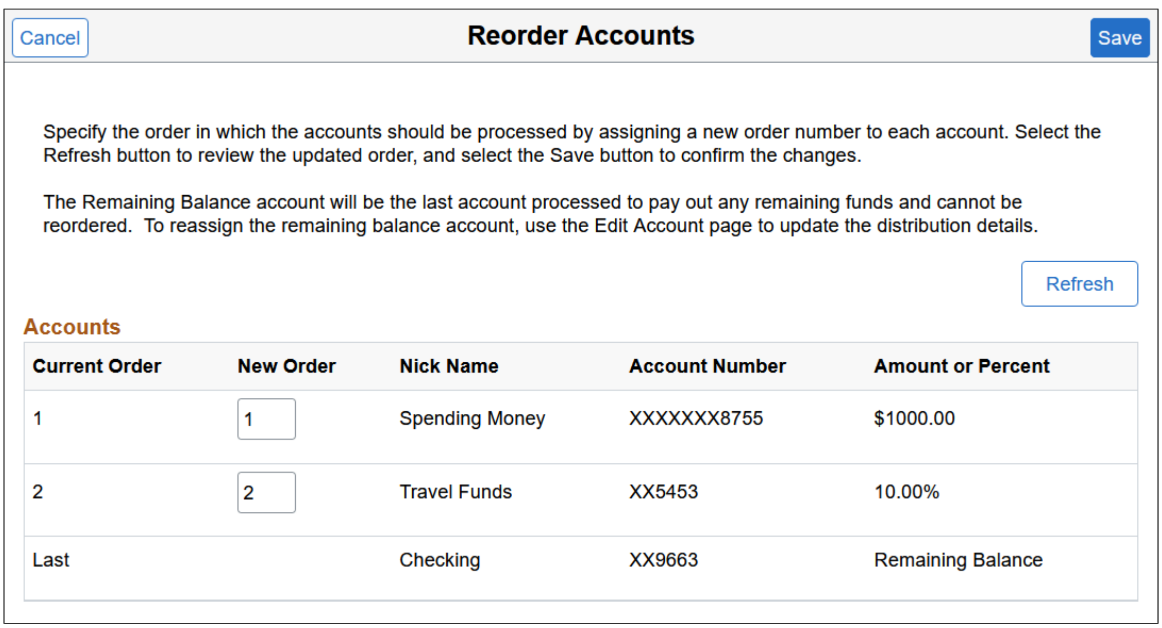
Navigation:

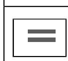
Select the **Reorder** button on the Direct Deposit page.

This example illustrates the Reorder Accounts page in non-screen reader mode.



This example illustrates the Reorder Accounts page in screen reader mode.



Field or Control	***Description***
	Select to drag and drop the corresponding account to the desired position.
New Order	(Screen reader mode only) Enter the order in which the corresponding account will be processed. Enter *1* for the account to be processed first. Do not enter duplicate order number or any number that is greater than the maximum order number in the list.

Field or Control	*Description*
Refresh	(Screen reader mode only) Select to review the updated list before saving the changes.

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.

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

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 Payroll for North America).

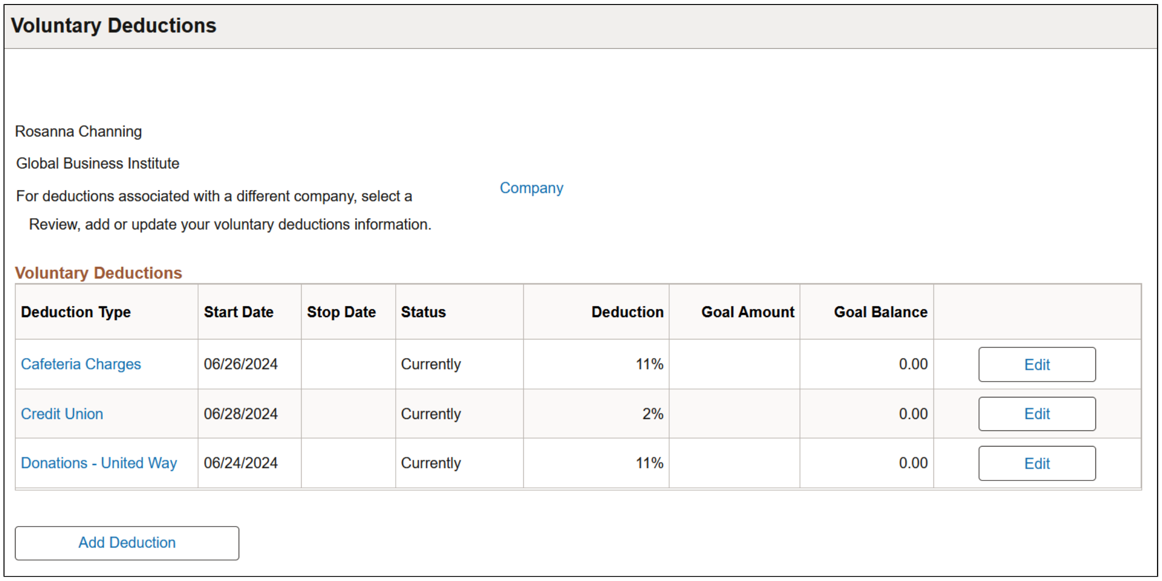
Voluntary Deductions Page

Use the Voluntary Deductions page (PY_IC_DED_LIST) to view a list of current voluntary deductions.

Navigation:

Select the **Voluntary Deductions** tile from the Payroll dashboard.

This example illustrates the fields and controls on the Voluntary Deductions page.



Field or Control	***Description***
Company	Select this link to choose a company you work for before viewing, adding or updating voluntary deductions on the Voluntary Deductions page (PY_IC_COMPANY). This link appears if you have multiple jobs with different companies.
Deduction Type	Select this link to view the corresponding voluntary deduction information on a page individually on the Voluntary Deduction Detail page.
Edit	Select this button to update the corresponding voluntary deduction on the Change Voluntary Deduction page.
Add Deduction	Select this button to add a new voluntary deduction on the Add Voluntary Deduction page.

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 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.

Note: Paycheck Modeler is now available in Fluid for employees to simulate their own paychecks and payroll administrators to simulate paychecks for employees. For more information, see (Fluid) Working With Paycheck Modeler.

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: Paycheck Modeler is available to payroll administrators in Classic (**Payroll for North America** > **Payroll Processing USA** > **Paycheck Modeling** > **Paycheck Modeler**), 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.

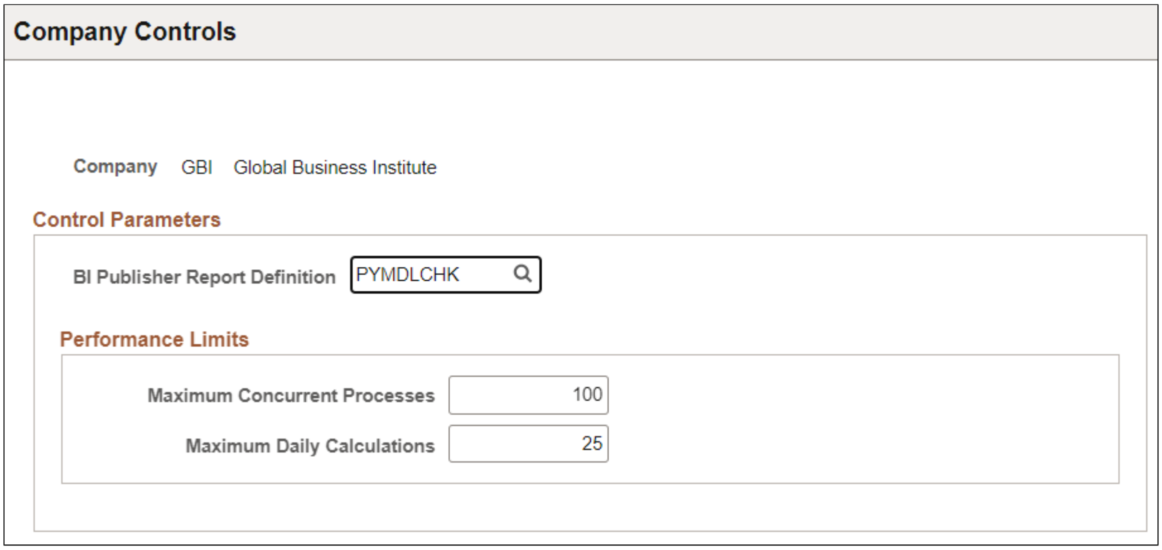
Company Controls Page

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

Navigation:

Set Up HCM > **Product Related** > **Payroll for North America** > **Paycheck Modeling USA** > **Company Controls** > **Company Controls**

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



Control Parameters

Field or Control	*Description*
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

Field or Control	*Description*
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.

Field or Control	Description
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.

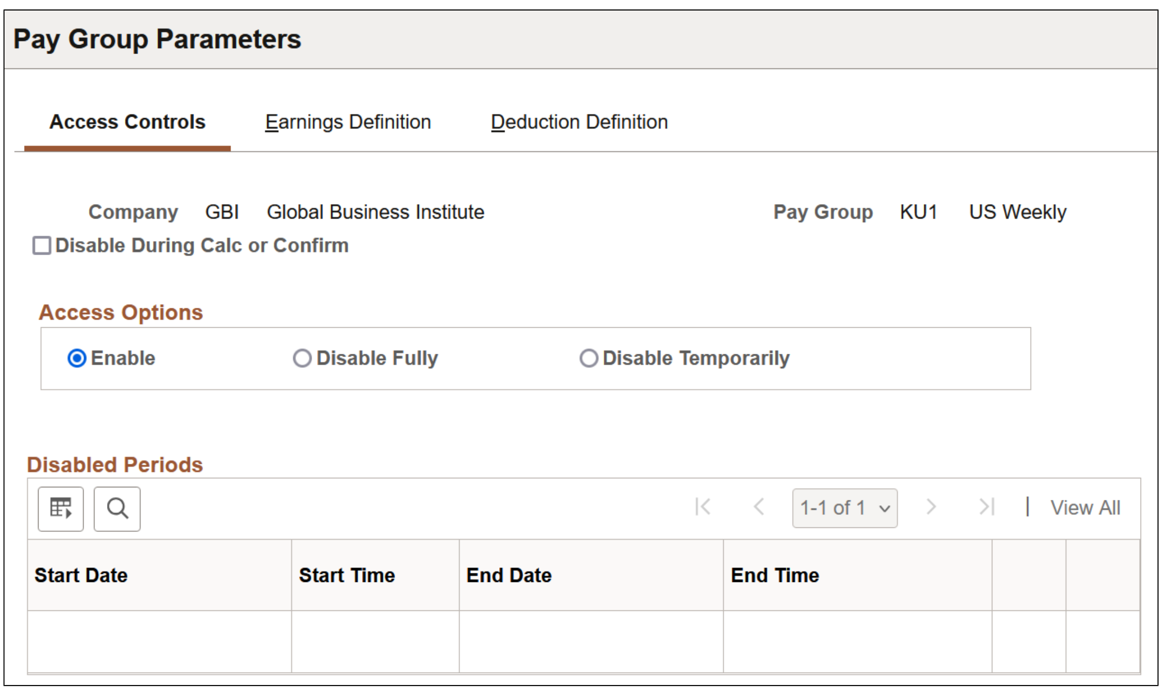
Pay Group Parameters - Access Controls Page

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:

Set Up HCM > **Product Related** > **Payroll for North America** > **Paycheck Modeling USA** > **Pay Group Parameters** > **Access Controls**

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.

Field or Control	***Description***
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.

Field or Control	***Description***
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

Field or Control	***Description***
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.

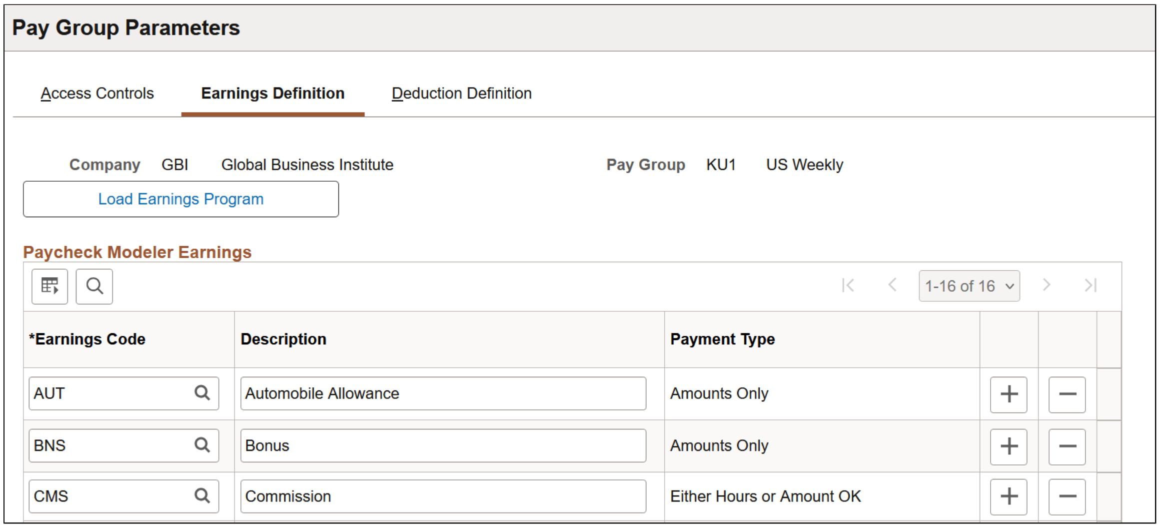
Pay Group Parameters - Earnings Definition Page

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:

Set Up HCM > **Product Related** > **Payroll for North America** > **Paycheck Modeling USA** > **Pay Group Parameters** > **Earnings Definition**

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



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.

Field or Control	***Description***
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

Field or Control	***Description***
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.

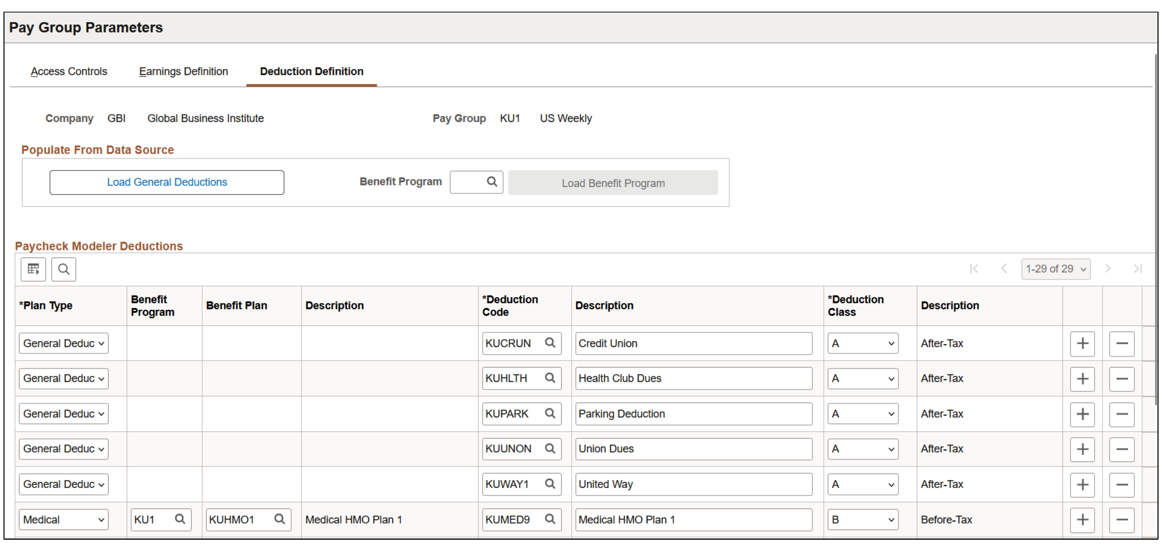
Pay Group Parameters - Deduction Definition Page

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:

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

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.

Field or Control	*Description*
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

Field or Control	*Description*
Plan Type, Benefit Program, and **Benefit Plan**	Select a plan type, benefit program, and benefit plan for each deduction to use.

Field or Control	***Description***
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):

Video: 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).

Term	*Definition*
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 Started** button, 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 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 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 Payroll for North America).

Earnings must be greater than zero to move forward.

Paycheck Modeler - Deductions Page

The items listed on the Paycheck Modeler - Deductions 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 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 Check**button. 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 modeled paycheck.

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.

(Fluid) Working With Paycheck Modeler

This topic provides an overview of Fluid Paycheck Modeler, lists setup steps, delivered user role, common elements, and discusses pages that are used to set up and calculate modeled paychecks.

Pages Used to Work with Fluid Paycheck Modeler

Page Name	***Definition Name***	***Usage***
Configure Page Template Page	PY_CFG_TMPL_PG	Set up display and text options for Paycheck Modeler pages.
Background Image Configuration Page	PY_CFG_IMG_SEC	Upload images used in the page background.
Configure Tax Page Header Page	PY_CFG_TXFRMHDR_PG	Set up the page header for Paycheck Modeler tax withholding pages.
Configure Tax Page Page	PY_CFG_TAX_PG	Set up display and text options for Paycheck Modeler tax withholding pages.
Field Label and Information Page	PY_CFG_TAX_FLDINFO	View or update section field labels.
Paycheck Modeler Tile	-	Start the paycheck modeling process.
Paycheck Modeler - Select a Job Page	PY_MOD_MULTIJOB_FL	Choose a job for the paycheck simulation.

Page Name	Definition Name	Usage
Paycheck Modeler - Welcome Page	PY_MOD_START_FL	Acknowledge the usage terms and conditions of Paycheck Modeler.
Paycheck Modeler - Decision Page	PY_MOD_SEL1_FL	Select the starting point of the modeling process.
Paycheck Modeler - Earnings Page	PY_MOD_EDTL_FL	Modify earnings information for the modeled paycheck calculation.
Paycheck Modeler - Deductions Page	PY_MOD_DDTL_FL	Modify deduction information for the modeled paycheck calculation.
Paycheck Modeler - Taxes Page	PY_MOD_TXDTL_FL	View tax withholding information for the modeled paycheck calculation.
Model Federal Tax Withholding Page	PY_MOD_TAX_SCF	Modify federal tax withholding information for the paycheck calculation.
Model State Tax Withholding Page	PY_MOD_ST_TAX_SCF	Modify state tax withholding information for the modeled paycheck calculation.
Modeled Local Tax Withholding Page	PY_MOD_LT_TAX_SCF	Modify local tax withholding information for the modeled paycheck calculation.
Paycheck Modeler - Results Page	PY_MOD_RSLT_FL	View the modeled paycheck results.
Paycheck Details Page	PY_MOD_CALRSLT_SCF	View details of the corresponding paycheck.
Compare Modeled Check Page	PY_MOD_CMP_RSLT_FL	View paycheck details before and after the paycheck modeling process.
View Modeled Changes Page	PY_MOD_AUDIT_SCF	View changes made in the paycheck modeling process.

Understanding Fluid Paycheck Modeler

Fluid Paycheck Modeler enhances the paycheck modeling process, providing employees a modern and intuitive user interface to simulate paychecks with their what-if scenarios.

Employees can use Paycheck Modeler to get quick estimates on their net pay based on changes in earnings, deductions, or tax withholding that they anticipate in life. For example, an employee is aware that a big bonus is coming. They can use the paycheck modeling tool to estimate future net pay with the bonus included and see if it is sufficient to fund a family trip.

To support the paycheck modeling process more effectively, Fluid Paycheck Modeler:

- Updates the design of the pages to improve user experience. It:
  - Provides users the option to choose the starting point of the process.
  - Adds visual indicators to help users identify where changes are made during the process.
  - Allows users to calculate the modeled check at any time when a change is made in earnings, deductions, or tax withholding, without the need to go through all the pages unnecessarily.
- Supports the configuration of pages, which enables administrators to set up what gets displayed on pages easily through configuration, for example, instructional text, page information, images, and section content.
- Can be run and is accessible on all form factors.

Warning! Modeled paychecks that are generated by Paycheck Modeler intend to provide general guidance and estimates only. They are not genuine paychecks and there is no guarantee that the estimates from modeled paychecks would match what appears on the actual paychecks. Do not make important decisions solely based on modeled paycheck results.
Fluid Paycheck Modeler supports U.S. employees with US-based jobs only. The functionality is currently not available to USF or CAN employees, or U.S. employees with jobs that are not based in the United States.

Refer to the Understanding Paycheck Modeler topic for more information about paycheck modeling that Fluid Paycheck Modeler supports.

Video: Image Highlights, PeopleSoft HCM Update Image 52: U.S. Fluid Paycheck Modeler

Understanding Paycheck Modeler for Administrators

Payroll administrators can also use Fluid Paycheck Modeler to simulate paychecks for employees or assist employees with questions regarding the paycheck modeling process.

Fluid Paycheck Modeler functions identically for both payroll administrators and employees.

Review the following items that are specific to *payroll administrators* when using the tool:

- The delivered user role and permission list are *U.S. Fluid Pay Modeler Admin*: and *HCCPPY1009* respectively.
- Navigation to Fluid Paycheck Modeler: **Payroll for North America** > **Payroll Processing USA** > **Paycheck Modeling** > **Paycheck Modeler**

  From the search page that appears, administrators can search for an employee for whom they want to simulate a paycheck to launch Paycheck Modeler.
- The **Next Steps** section on the Paycheck Modeler - Results Page is display only.

Paycheck Modeler Page Configuration

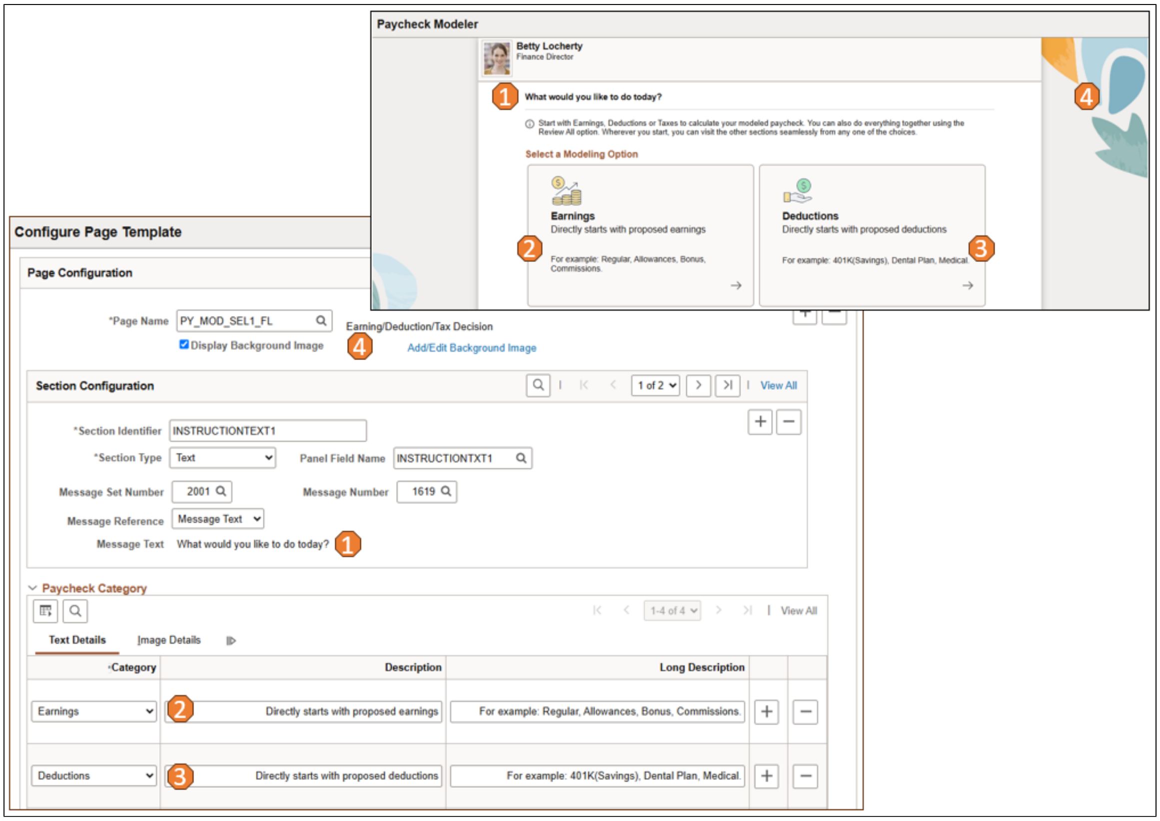
Paycheck Modeler provides system administrators flexible configuration options to determine what appears on Paycheck Modeler pages for users to simulate paychecks.

Page Configuration

PeopleSoft delivers a page configuration template (*PYCHKMOD* for U.S. Payroll) that enables the dynamic rendering of details of pages used in Paycheck Modeler. Depending on the nature of the page, configuration options are available to manage page displays, such as instructional texts (which are displayed with the Information icon), page information, background color and image, for these pages:

- Paycheck Modeler - Welcome Page (PY_MOD_START_FL)
- Paycheck Modeler - Select a Job Page (PY_MOD_MULTIJOB_FL)
- Paycheck Modeler - Decision Page (PY_MOD_SEL1_FL)
- Paycheck Modeler - Earnings Page (PY_MOD_EDTL_FL)
- Add (or Edit) Earnings page (PY_MOD_SS_ERN_SCF)
- Paycheck Modeler - Deductions Page (PY_MOD_DDTL_FL)
- Add Deductions page (PY_MOD_DED_ADD_SCF)
- Edit Deductions page (PY_MOD_DEDEDIT_SCF)
- Paycheck Modeler - Taxes Page (PY_MOD_TXDTL_FL)
- Model Federal Tax Withholding Page (PY_MOD_TAX_SCF)
- Model State Tax Withholding Page (PY_MOD_ST_TAX_SCF)
- Modeled Local Tax Withholding Page (PY_MOD_LT_TAX_SCF)
- Paycheck Modeler - Results Page (PY_MOD_RSLT_FL)
- Paycheck Details Page (PY_MOD_CALRSLT_SCF)
- Compare Modeled Check Page (PY_MOD_CMPRSLT_SCF)
- View Modeled Changes Page (PY_MOD_AUDIT_SCF)

This image illustrates the relationship between page elements of Paycheck Modeler page and where they were configured on the page configuration.



From the Paycheck Modeler page image (top screenshot), each page element that has an assigned number is controlled by the field on the configuration page (bottom screenshot) with the same assigned number.

Administrators can create custom templates to modify the look and feel of pages based on their requirements by cloning from the system-delivered template.

Tax Form Page Configuration

Additionally, PeopleSoft delivers tax page configuration to support the dynamic rendering of details for federal, state, and local tax withholding pages that are available on the Paycheck Modeler - Taxes Page. These setup pages include:

- Configure Tax Page Header Page, specifying the image, tax form report template, and tax form instructions used for the tax withholding page, which are displayed in the header area of the page.

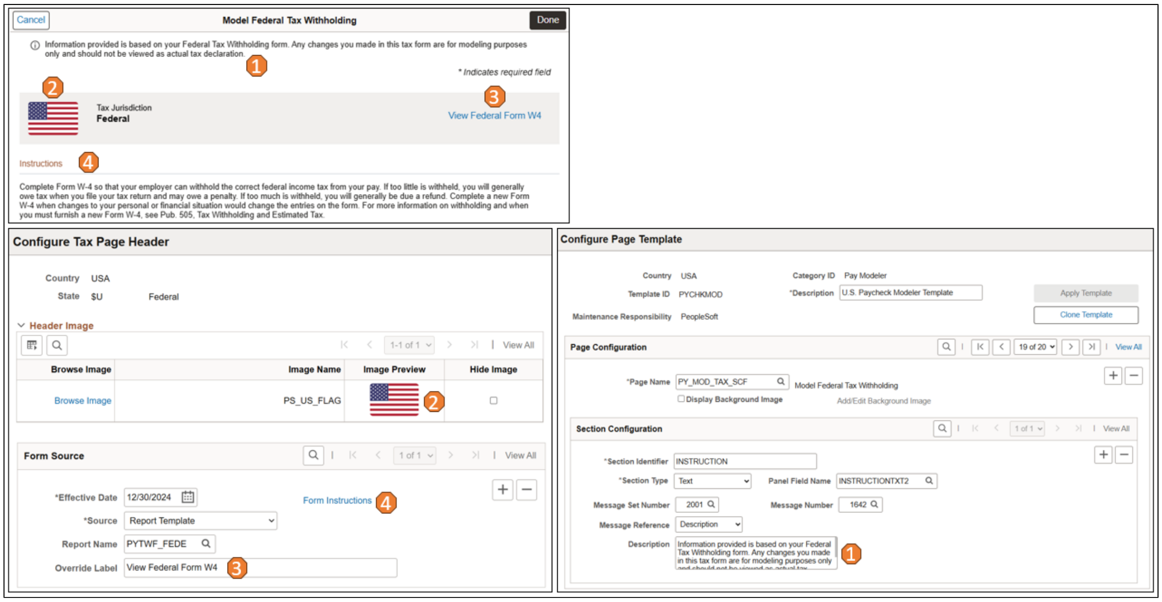
  The system delivers page header setup for federal and state withholding pages.

- Configure Tax Page Page, which includes what appears on the withholding page, such as page sections, as well as fields and texts included in each section.

  The system delivers tax page setup for federal, state, and local tax withholding pages. Administrators can create custom tax page configuration to modify tax page display based on their requirements by cloning from the delivered templates.

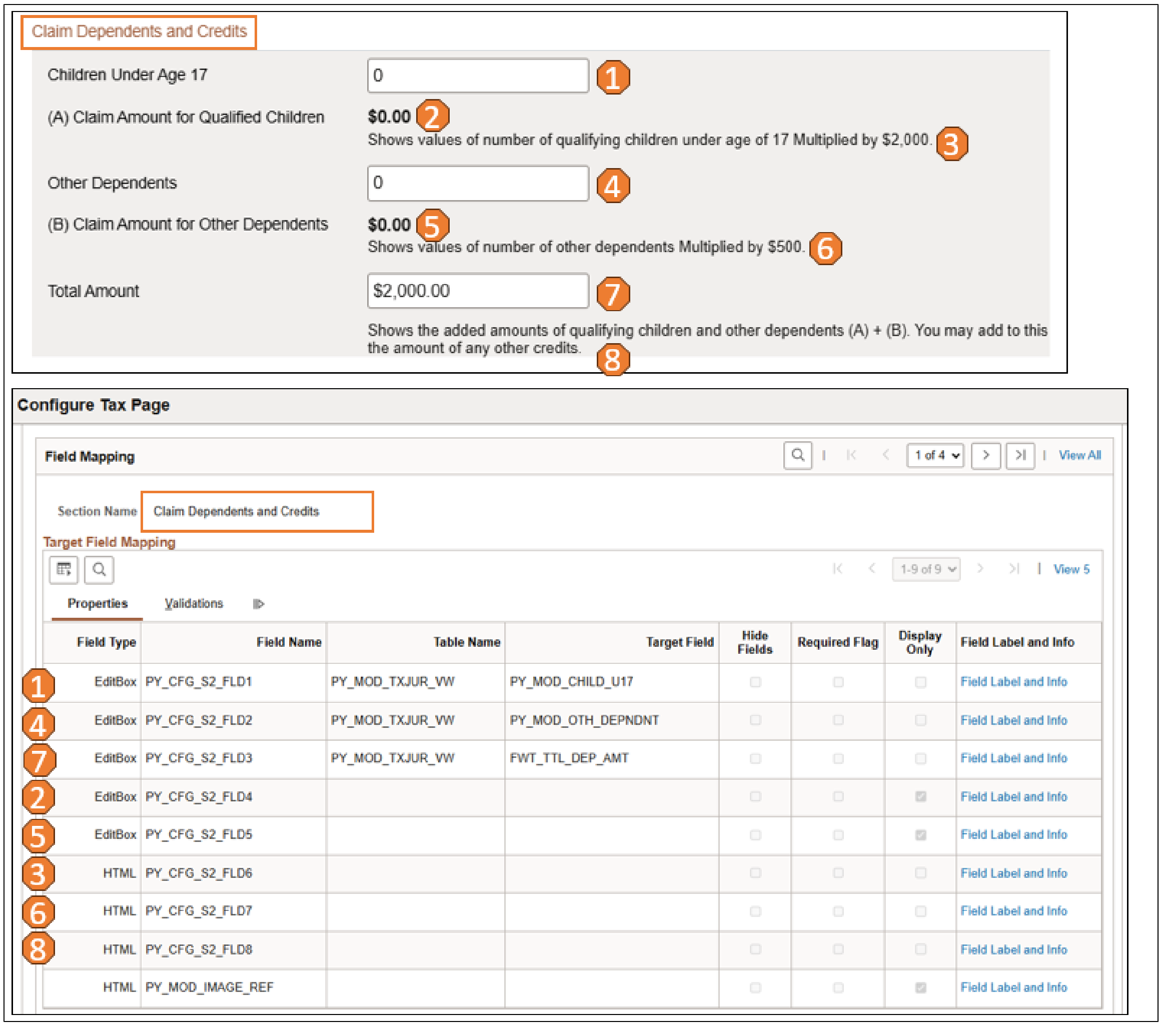
Note: The system does not deliver configuration setup for states that do not have state income tax, with an exception for Washington. A system-delivered template for WA is available to support paycheck modeling on paid family and medical leave tax classes for the state of Washington.

This image illustrates the relationship between page elements on the header of a tax withholding page and where they were configured on the tax page header and page template pages.



From the page header image, each page element in the federal tax withholding page header (top screenshot) that has an assigned number is controlled by the field on a configuration page (either bottom screenshot) with the same assigned number.

This image illustrates the relationship between page elements on a tax withholding page and where they were configured on the tax page configuration.



From the page section image, each page element in the *Claim Dependents and Credits* section of the federal tax withholding page (top screenshot) that has an assigned number is controlled by the field on the configuration page (bottom screenshot) with the same assigned number.

Setting Up Fluid Paycheck Modeler

Here are the high-level steps for setting up Fluid Paycheck Modeler:

1. Review and ensure that the setup tasks for the classic version of Paycheck Modeler are completed.

   See Pages Used to Set Up Paycheck Modeling.

2. Review the delivered setup for Paycheck Modeler pages on the Configure Page Template Page.

   If changes need to be made to the page display, such as different images, texts, or hide an action, clone from the delivered template and update the custom template.

3. Review the delivered setup for federal, state, and local tax withholding pages on the Configure Tax Page Header Page and Configure Tax Page Page.

If changes need to be made to the page display, such as different texts, or hide a field, clone from the delivered template on the Configure Tax Page page and update the custom template. Use the Configure Tax Page Header page to make changes to the page header as needed.

Delivered User Roles and Permission Lists

The system delivers user roles and permission lists for using Fluid Paycheck Modeler.

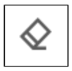
User	***User Role***	***Permission List***
U.S. employee	*U.S. Fluid Paycheck Modeling*	*HCCPPY1008*
Payroll administrator	*U.S. Fluid Pay Modeler Admin*	*HCCPPY1009*

Common Elements Used in Fluid Paycheck Modeler

This section lists the common page controls that are used on Fluid Paycheck Modeler pages.

Field or Control	***Description***
Calculate Check	Select to calculate the modeled check using the information on Earnings, Deductions and Tax pages, and view the results on the Paycheck Modeler - Results Page. This button becomes available when a change is made. You cannot calculate modeled checks if the configured maximum daily limit or concurrent user access has been exceeded for the company on the Company Controls Page. If the daily limit is reached, the system generates an error message when you select the **Paycheck Modeler** tile, preventing you from starting a modeling session.

Field or Control	***Description***
View Modeled Result	Select to review details of the paycheck to be used for modeling on the Paycheck Modeler - Results Page. Depending on the state of the session when the button is selected, the messages and results presented can be different. For example: • If you select the button before any modeling changes are made, you have the option to either go back and make changes, or view the results before any modeling. Several page elements are not applicable and therefore not displayed when you are viewing a check without any modeling changes, such as the **Modeled Check: After** card,and the **Show Changes** and **Compare** buttons. • If you select the button after calculating the check with changes, results of the modeled check are shown. • If, after viewing the modeled check, you make additional changes but the check has not been calculated when you select the button, you have the option to either go back and calculate the check, or view the results of the last modeled check.
Exit	Select to leave Paycheck Modeler. Data updated during the session is not saved when you exit.
	Select to add new earnings or deduction rows with relevant information to be used in modeling the paycheck. A *Modeled* tag is displayed for each added row.
Clear All	Select to set the amounts of all rows and the total amount on the page to zero. A *Modeled* tag is displayed for each row that has a cleared amount.
Restore	Select to revert all changes on the page back to their original values. This button becomes available when one or more values have been cleared or changed.
Sort	Select to sort table data by column in ascending or descending order.

Field or Control	Description
	Select to update the details (for example, amount or gross percentage) of the corresponding row on the Edit Earnings page, Edit Deductions page, or Model <Federal/State/Local> Tax Withholding page. A *Modeled* tag is displayed for each row that has been edited.
	Select to set the amount of the corresponding row to zero. A *Modeled* tag is displayed for each row that has a cleared amount.

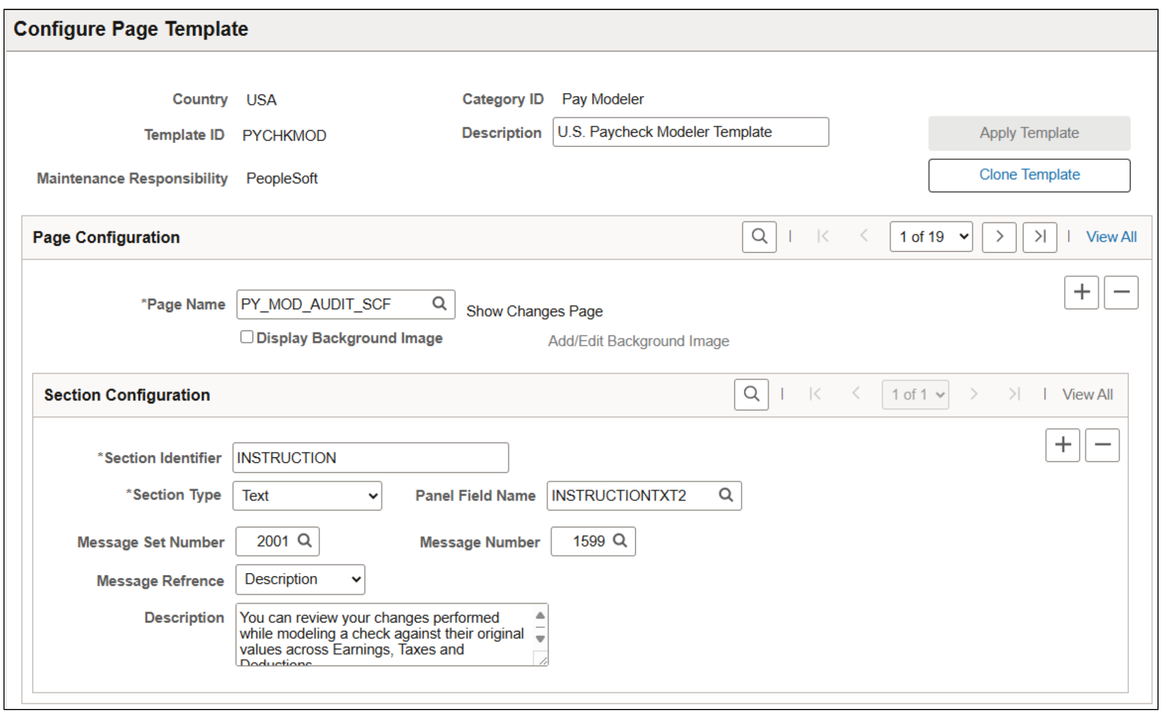
Configure Page Template Page

Use the Configure Page Template page (PY_CFG_TMPL_PG) to set up display and text options for Paycheck Modeler pages.

Navigation:

Set Up HCM > Common Definitions > ePay Configuration Framework > Configure Page Template > Configure Page Template

This example illustrates the fields and controls on the Configure Page Template page.



Oracle delivers the *PYCHKMOD* template to configure Paycheck Modeler pages for U.S. Payroll.

Field or Control	*Description*
Apply Template	Select to use this template to render the Paycheck Modeler pages of the specified country and category. For example, use this button to switch to use a custom template you just updated,or back to the delivered template if preferred. This field is read-only if the template you're viewing is the one used for page rendering already.
Clone Template	Select to create a new template by cloning from template you're viewing. **Note:** If customers wish to create their own templates to modify the look and feel of the pages used, Oracle recommends that they create customer-maintained templates by cloning from the delivered template, and make updates in the new templates as desired.

Page Configuration

Field or Control	*Description*
Page Name	Select a page to be configured as part of the template.
Display Background Image	Select to enable the display of a background image on the specified page.
Add/Edit Background Image	Select to add background images for the specified page on the Background Image Configuration Page. This link becomes available when the **Display Background Image** field is selected.

Section Configuration

Field or Control	*Description*
Section Identifier	Specify a name to identify the section. Some section identifiers included in the delivered template include BACKGROUNDCOLOR and INSTRUCTION.

Field or Control	***Description***
Section Type	Select the type of section configuration. Available values are: *Background Color* *HTML* *Text*
Panel Field Name	Select the panel field to which the configuration applies.
Theme	Select how the background color of the page is specified. Values are: *Color Code:* When selected, enter a hex code for the color in the **Hexadecimal** field that appears. *Solid Color:* When selected, choose a color from the **Color** field that appears. This field appears if the selected section type is *Background Color*.
HTML Code	Enter the HTML code for the display. This field appears if the selected section type is *HTML*.
Add Bind Values	Enter bind values that are included in the HTML code on the Add Bind Values page (PY_CFG_HTMLBIND_PG). This link appears if the selected section type is *HTML*.
Message Set Number and **Message Number**	Specify the Message Catalog set number and number of the text (for example, instructional text) to use, if desired. This field appears if the selected section type is *Text*.
Message Reference	Select to display text from a free-form description field or a Message Catalog entry. Values are: *Description* *Message Text* This field appears if the selected section type is *Text*.

Field or Control	***Description***
Description	Enter free-form text. This field appears if the selected message reference type is *Description.*
Message Text	Displays the message text of the specified message set number and message number. This field appears if the selected message reference type is *Message Text.*

Paycheck Category

This section controls which:

- Modeled check cards and associated images are displayed on the Paycheck Modeler - Results Page (PY_MOD_RSLT_FL).
- Paycheck Modeler page cards and associated images are displayed Paycheck Modeler - Decision Page (PY_MOD_SEL1_FL).

Field or Control	***Description***
Category	Select a category to appear on the selected page as a card. Available values change based on the selected page. Values for PY_MOD_RSLT_FL are: *Modeled Check After* *Modeled Check Before* *Modeled Check Insights* Values for PY_MOD_SEL1_FL are: *Deductions* *Earnings* *Review All* *Taxes*
Description and **Long Description**	Enter a short and a long description of the category. The short description is used as the title of the card.

Field or Control	***Description***
Browse Image	Select the link to choose a graphic for the specified category on the Browse Image Catalog page. For more information about the Image Catalog, refer to *PeopleTools: Portal Technology*, "Administering Portals," Browsing the Image Catalog.
Image Name and **Image Preview**	Displays the name and image of the selected graphic.

Next Actions

Use this section to insert additional actions that are available to users on the Paycheck Modeler - Results Page.

Field or Control	***Description***
Display Order	Enter the order in which the action appears in the **Next Steps** section of the results page.
Content Reference Name	Specify the name of the content reference for the related action that users can take after viewing the simulation results.
Description and **Long Description**	Enter a short and a long description of the entry. The short description is used as the link label of the card. The long description appears below the link label.
Open in New Window	Select to open the page of the action in a new browser tab or window.
Hide	Select to not show the action.
Browse Image	Select the link to choose a graphic for the specified action on the Browse Image Catalog page.
Image Name and **Image Preview**	Displays the name and image of the selected graphic.

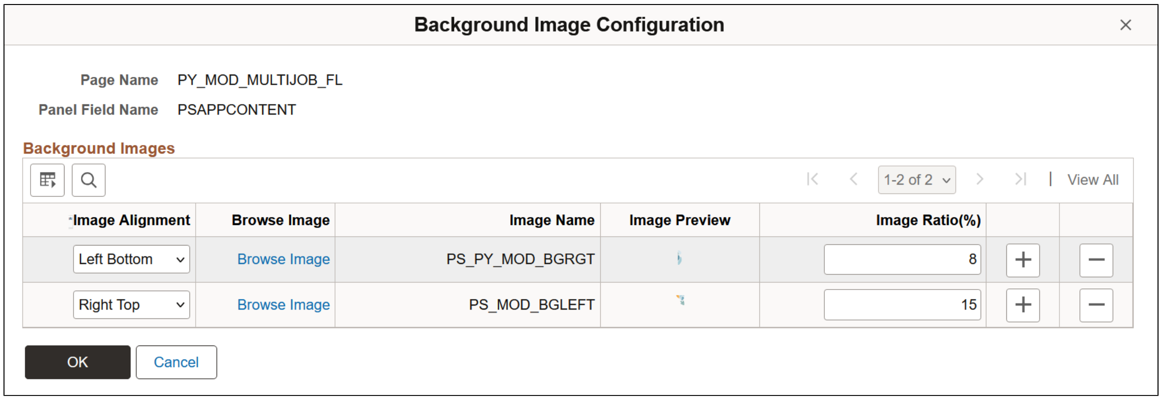
Background Image Configuration Page

Use the Background Image Configuration page (PY_CFG_IMG_SEC) to upload images used in the page background.

Navigation:

Select the **Add/Edit Background Image** link on the Configure Page Template page.

This example illustrates the fields and controls on the Background Image Configuration page.



Field or Control	***Description***
Image Alignment	Select the corner location of the page to place the image.
Browse Image	Select the link to choose a graphic for the specified page on the Browse Image Catalog page.
Image Name and **Image Preview**	Displays the name and image of the selected graphic.
Image Ratio	Enter the ratio of the image to the page. Enter between 1 to 100.

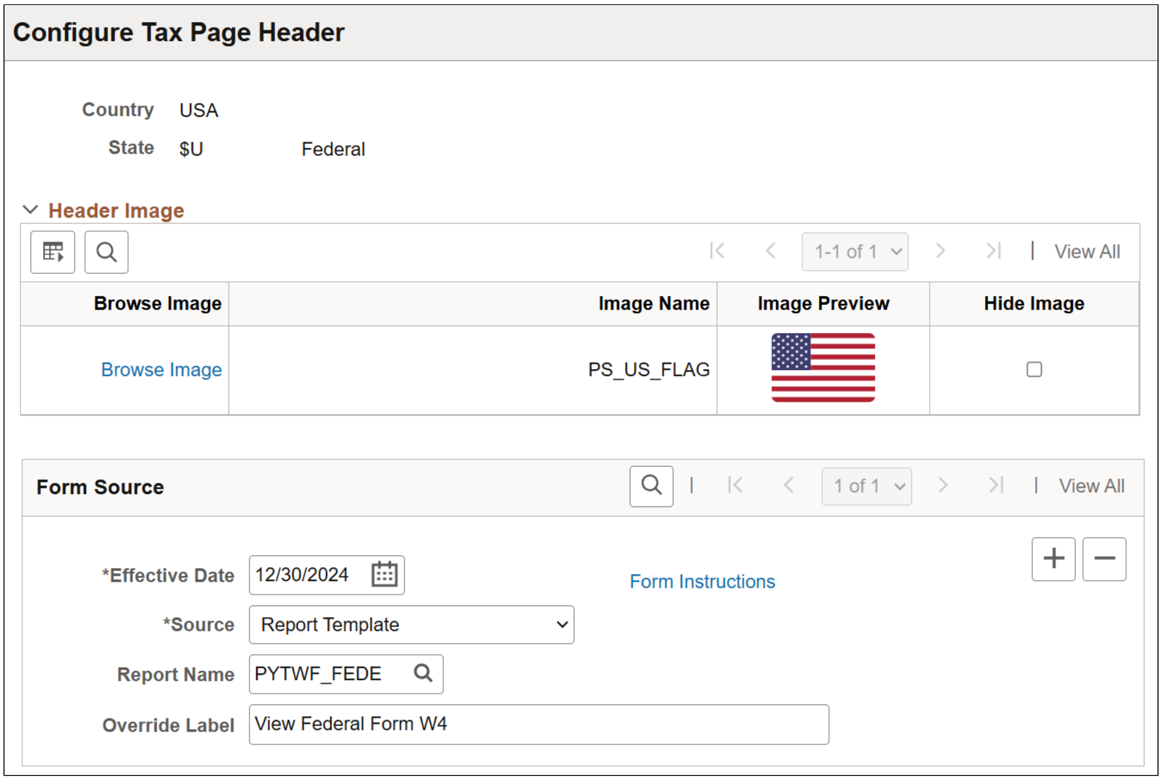
Configure Tax Page Header Page

Use the Configure Tax Page Header page (PY_CFG_TXFRMHDR_PG) to set up the page header for Paycheck Modeler tax withholding pages.

Navigation:

Set Up HCM > **Common Definitions** > **ePay Configuration Framework** > **Configure Tax Page Header** > **Configure Tax Page Header**

This example illustrates the fields and controls on the Configure Tax Page Header page.



The system delivers tax page header configuration for federal and states.

Field or Control	***Description***
Browse Image	Select the link to choose a graphic for the specified category on the Browse Image Catalog page.
Hide Image	Select to not show the image on the tax withholding page header.

Form Source

Field or Control	***Description***
Source	Select the source of tax form link, which appears in the header of the tax withholding page. Values are: *None:* No link to display. *Report Template:* Select to specify the BI Publisher report template for the tax form in the **Report Name** field that appears. *URL:* Select to specify the URL of the tax form in the **URLID** field that appears.
Override Label	Enter a new label for the tax form link if needed.
Form Instructions	Select to view or update the instructional text for the tax form on the Form Instructions page (PY_CFG_FORMINS_SEC), if applicable. Entered text appears in the **Instructions** section of the corresponding federal or state tax withholding page. If there is no instructional text defined, the **Instructions** section is not displayed. Note that this instructional text is tax form-specific; it is different from the instructional text for Paycheck Modeler pages that is displayed with the Information icon, which is defined on the Configure Page Template Page.

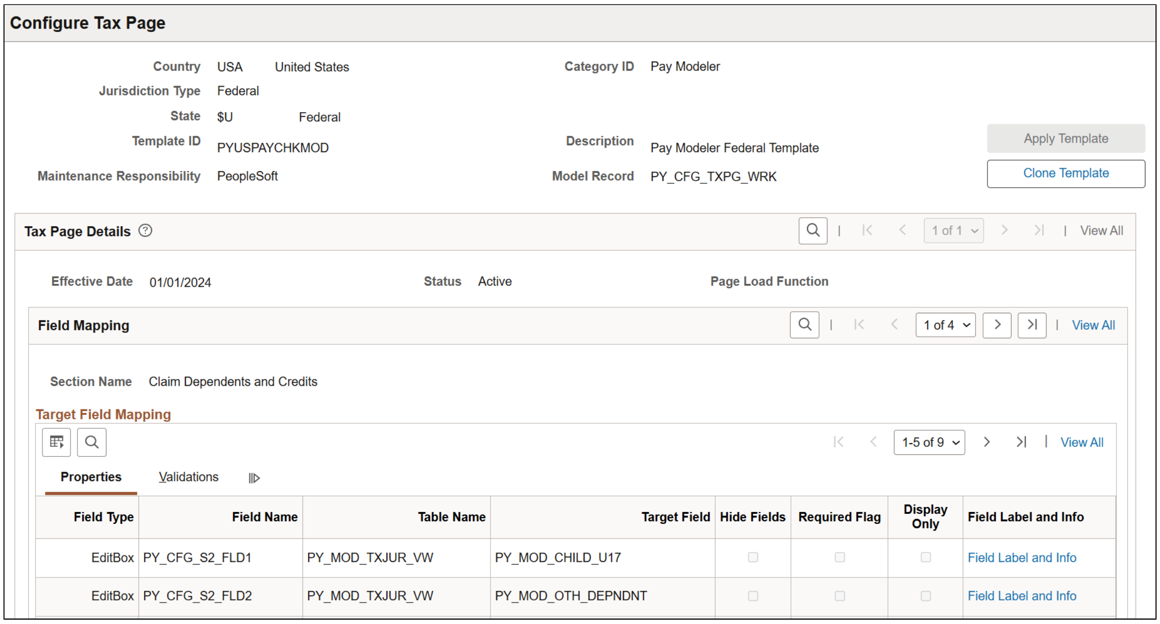
Configure Tax Page Page

Use the Configure Tax Page page (PY_CFG_TAX_PG) to set up display and text options for Paycheck Modeler tax withholding pages.

Navigation:

Set Up HCM > Common Definitions > ePay Configuration Framework > Configure Tax Page > Configure Tax Page

This example illustrates the fields and controls on the Configure Tax Page page.



The system delivers tax page configuration for:

- Federal tax withholding
- State tax withholding (for states that have income tax, and WA)
- Local tax withholding (for IN, MI, and NY, where locality details are also available on their state W-4.)

Tax page configuration is used for rendering tax withholding pages in Paycheck Modeler. Each delivered configuration includes page fields to support its W-4, field properties and validation.

Administrators can use system-delivered configuration, or create custom configurations if they wish to modify field properties (hidden, required, read-only) or change field labels to suit their needs.

Field or Control	***Description***
Apply Template	Select to use this active template to render the tax withholding page of the specified country, category, jurisdiction type, and state. For example, use this button to switch to use a custom template you just updated,or back to the delivered template if preferred. This field is read-only if the template you're viewing is the one used for page rendering already.

Field or Control	*Description*
Clone Template	Select to create a new template by cloning from template you're viewing. **Note:** If customers wish to create their own templates to modify the look and feel of their federal, state, and local tax withholding pages, Oracle recommends that they create customer-maintained templates by cloning from the delivered templates, and make updates in the new templates as desired.

Tax Page Details

Tax page configuration is effective-dated and can be inactivated. The system uses the latest active configuration to render tax withholding pages.

Field Mapping

Field or Control	*Description*
Section Name	Displays or select the name of a section on the tax withholding page.

Target Field Mapping

This section displays fields that appear in the specified section.

Field or Control	*Description*
Field Type	Displays or select the type of the field. Values are: *CheckBox* *DropDown* *EditBox* *HTML* *Push Button* *Radio Button*
Field Name, **Table Name**, and **Target Field**	Identifies the field to be displayed in the page section.
Hide Fields	Displays whether the field is shown or hidden on the page, or select to hide the field.

Field or Control	***Description***
Required Flag	Displays whether or not the field is required, or select to indicate that the field is required.
Display Only	Displays whether or not the field is read-only, or select to indicate that the field is read-only.
Field label and Info	Select to view or update field label or instructional text (for *HTML* field type) on the Field Label and Information Page.

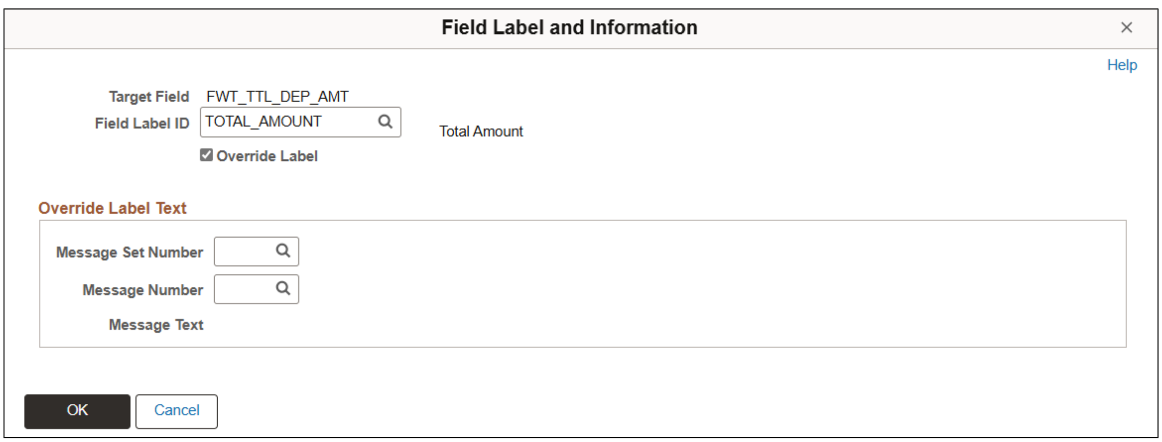
Field Label and Information Page

Use the Field Label and Information page (PY_CFG_TAX_FLDINFO) to view or update section field labels.

Navigation:

Select the **Field Label and Info** link on the Configure Tax Page page.

This example illustrates the fields and controls on the Field Label and Information page.



Field or Control	***Description***
Override Label	(When page is read-only) Displays whether or not the existing field label has been overridden. (When page is editable) Select to replace the existing label of the field. When selected, the **Override Label Text** section that appears.

Override Label Text

Select text from the Message Catalog to be the new field label by specifying the text's message set number and number.

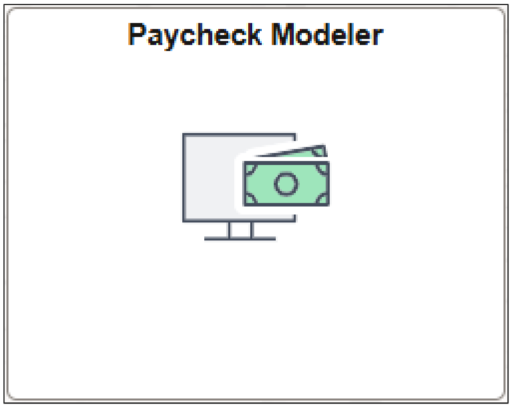
Paycheck Modeler Tile

Use the Paycheck Modeler tile to start the paycheck modeling process.

Navigation:

The Paycheck Modeler tile is delivered as part of the Payroll Dashboard, but you can add the tile to any home page through personalizations.

This example illustrates the Paycheck Modeler tile.



The paycheck modeling process calculates hypothetical checks based on the suggested changes you made on your earnings, deductions, as well as tax withholding.

Note: Paycheck Modeler is available to employees who have at least one generated paycheck in the system.

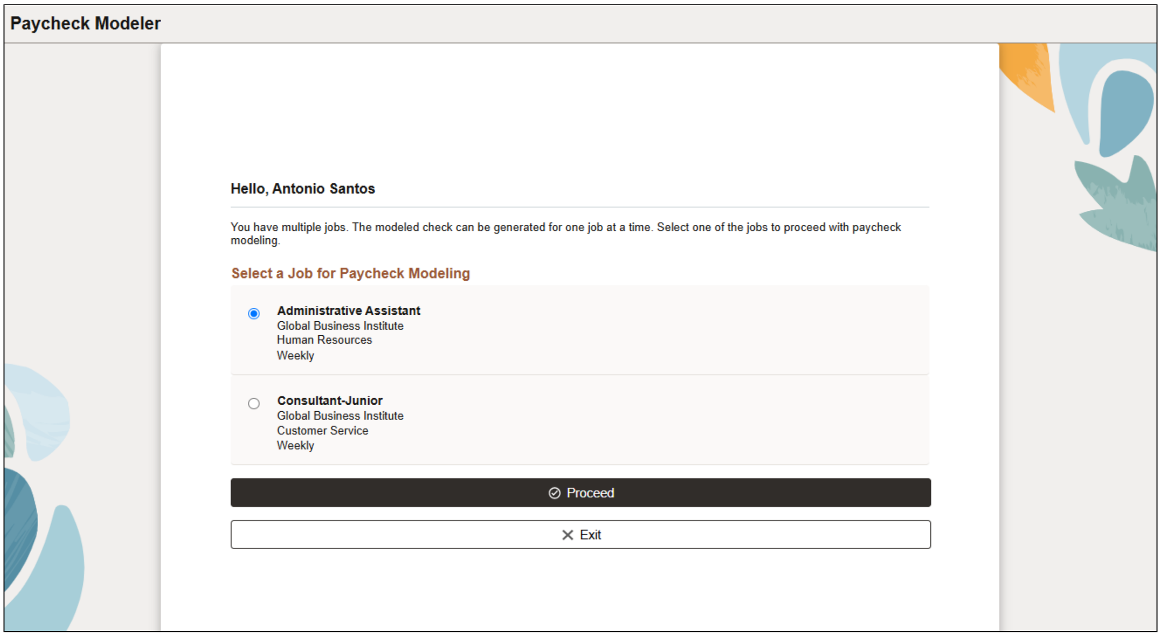
Paycheck Modeler - Select a Job Page

Use the Paycheck Modeler - Select a Job page (PY_MOD_MULTIJOB_FL) to choose a job for the paycheck simulation.

Navigation:

- (Employee) Select the **Paycheck Modeler** tile.
- (Payroll administrator) **Payroll for North America** > **Payroll Processing USA** > **Paycheck Modeling** > **Paycheck Modeler**

This example illustrates the fields and controls on the Paycheck Modeler - Select a Job page.



Paycheck Modeler can model paycheck for one job at a time. This page appears if the system determines that the employee has multiple jobs.

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.

Select the job to use to model the paycheck. Select the **Proceed** button to move to the next step, or **Exit** to leave the tool.

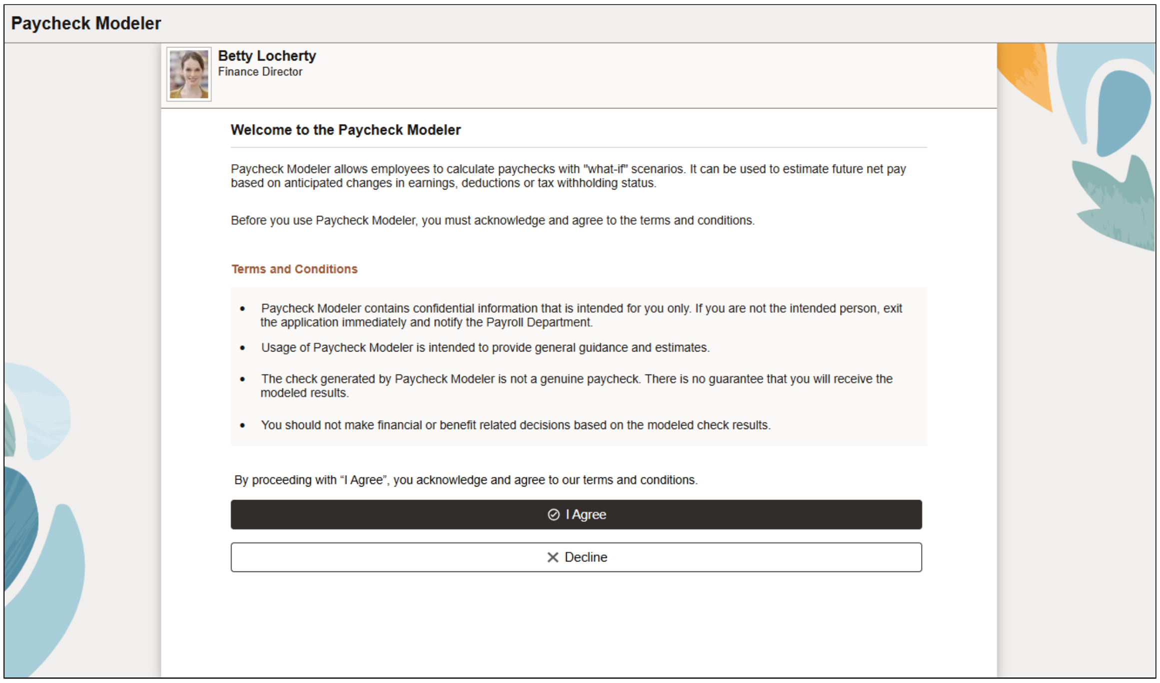
Paycheck Modeler - Welcome Page

Use the Paycheck Modeler - Welcome page (PY_MOD_START_FL) to acknowledge the usage terms and conditions of Paycheck Modeler.

Navigation:

- (Employee with single job) Select the **Paycheck Modeler** tile on the Payroll dashboard.
- (Employee with multiple jobs) Select the **Proceed** button on the Paycheck Modeler - Select a Job page.
- (Payroll administrator) **Payroll for North America** > **Payroll Processing USA** > **Paycheck Modeling** > **Paycheck Modeler**

This example illustrates the fields and controls on the Paycheck Modeler - Welcome page.



The welcome page introduces Paycheck Modeler and lists the terms and conditions for using the tool. Select the **I Agree** button to provide acknowledgement and move to the step, which is to decide where to start the paycheck modeling session.

Select **Decline** to exit the tool and return to the previous page.

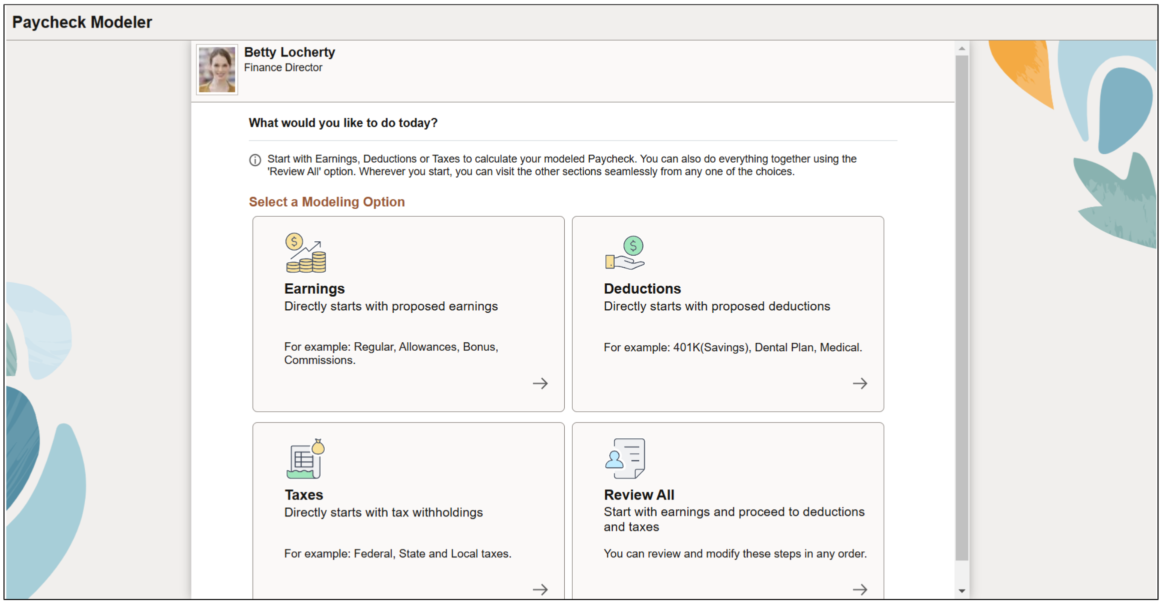
Paycheck Modeler - Decision Page

Use the Paycheck Modeler - Decision page (PY_MOD_SEL1_FL) to select the starting point of the modeling process.

Navigation:

Select the **I Agree** button on the Paycheck Modeler - Welcome page.

This example illustrates the fields and controls on the Paycheck Modeler - Decision page.



This page displays four available options to launch the paycheck modeling session. Start by:

- Making earnings changes on the Paycheck Modeler - Earnings Page.
- Making deduction changes on the Paycheck Modeler - Deductions Page.
- Making tax withholding changes on the Paycheck Modeler - Taxes Page.
- Making updates on earnings, followed by deductions and tax withholding information.

If you plan to make one type of changes (for example, deductions) only, it is quicker to navigate directly to that page and make the updates. Note that when you are on a page, you can navigate freely to other pages to view or edit the information that is used to calculate the modeled paycheck.

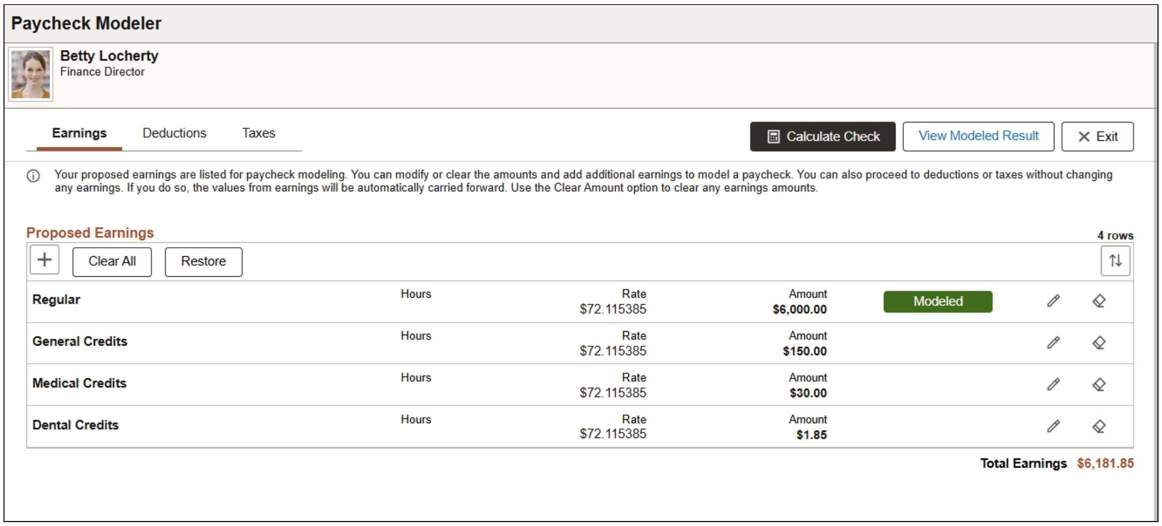
Paycheck Modeler - Earnings Page

Use the Paycheck Modeler - Earnings page (PY_MOD_EDTL_FL) to modify earnings information for the modeled paycheck calculation.

Navigation:

- Select the **Earnings** or **Review All** card on the Paycheck Modeler - Decision page.
- Select the **Earnings** tab in Paycheck Modeler.

This example illustrates the fields and controls on the Paycheck Modeler - Earnings page.



This page displays employee's standard earnings from the last confirmed paycheck.

The additional earnings that are available to add to paycheck modeling are based on the earnings defined for the employee's company and pay group on the Pay Group Parameters - Earnings Definition Page.

See Common Elements Used in Fluid Paycheck Modeler.

For more information about the Earnings page, refer to the **Paycheck Modeler - Earnings Page** section of the Understanding the Self-Service Paycheck Modeling Process topic.

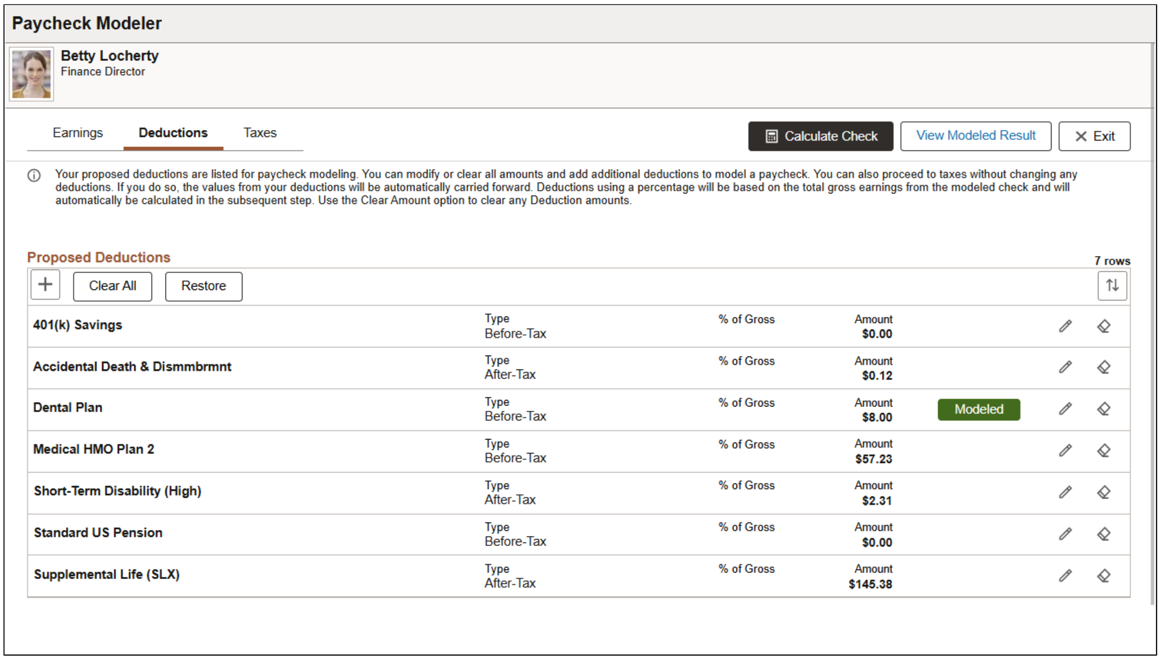
Paycheck Modeler - Deductions Page

Use the Paycheck Modeler - Deductions page (PY_MOD_DDTL_FL) to modify deduction information for the modeled paycheck calculation.

Navigation:

- Select the **Deductions** card on the Paycheck Modeler - Decision page.
- Select the **Deductions** tab in Paycheck Modeler.

This example illustrates the fields and controls on the Paycheck Modeler - Deductions page.



This page displays 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 for the employee's company and pay group on the Pay Group Parameters - Deduction Definition Page.

If the specified calculation method of a deduction is *Percentage of Gross,* the calculation is based on the total gross earnings of the modeled check.

See Common Elements Used in Fluid Paycheck Modeler.

For more information about the Deductions page, refer to the **Paycheck Modeler - Deductions Page** section of the Understanding the Self-Service Paycheck Modeling Process topic.

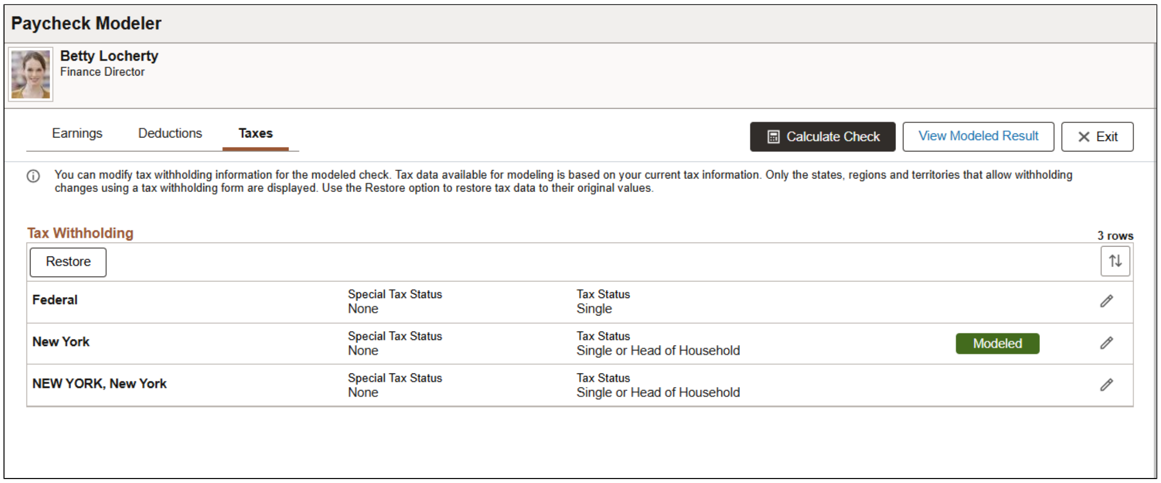
Paycheck Modeler - Taxes Page

Use the Paycheck Modeler - Taxes page (PY_MOD_TXDTL_FL) to view tax withholding information for the modeled paycheck calculation.

Navigation:

- Select the **Taxes** card on the Paycheck Modeler - Decision page.
- Select the **Taxes** tab in Paycheck Modeler.

This example illustrates the fields and controls on the Paycheck Modeler - Taxes page.



This page displays the employee's tax withholding information from the last confirmed paycheck. It includes a federal tax withholding row, a state tax withholding row based on the employee's work or resident state, as well as local tax if the locality that the employee lives or works has taxation.

Edit the details of the tax withholding rows as needed for paycheck modeling.

See Common Elements Used in Fluid Paycheck Modeler.

For more information about the Taxes page, refer to the **Paycheck Modeler - Taxes Page** section of the Understanding the Self-Service Paycheck Modeling Process topic.

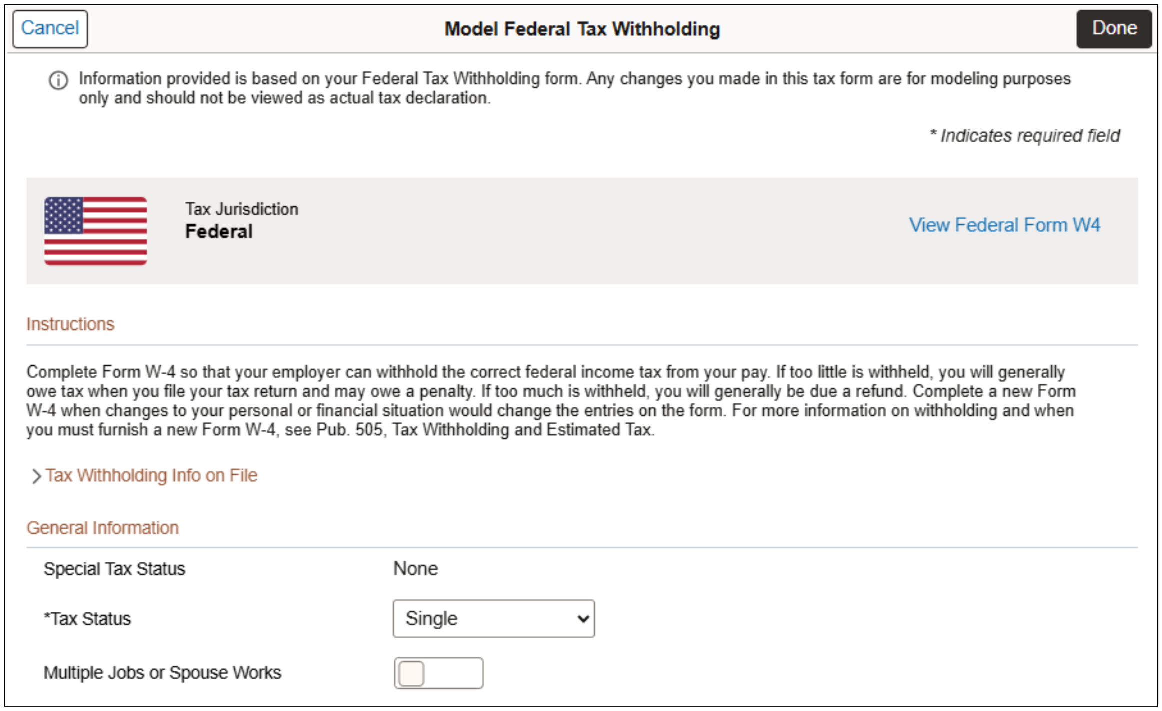
Model Federal Tax Withholding Page

Use the Model Federal Tax Withholding page (PY_MOD_TAX_SCF) to modify federal tax withholding information for the modeled paycheck calculation.

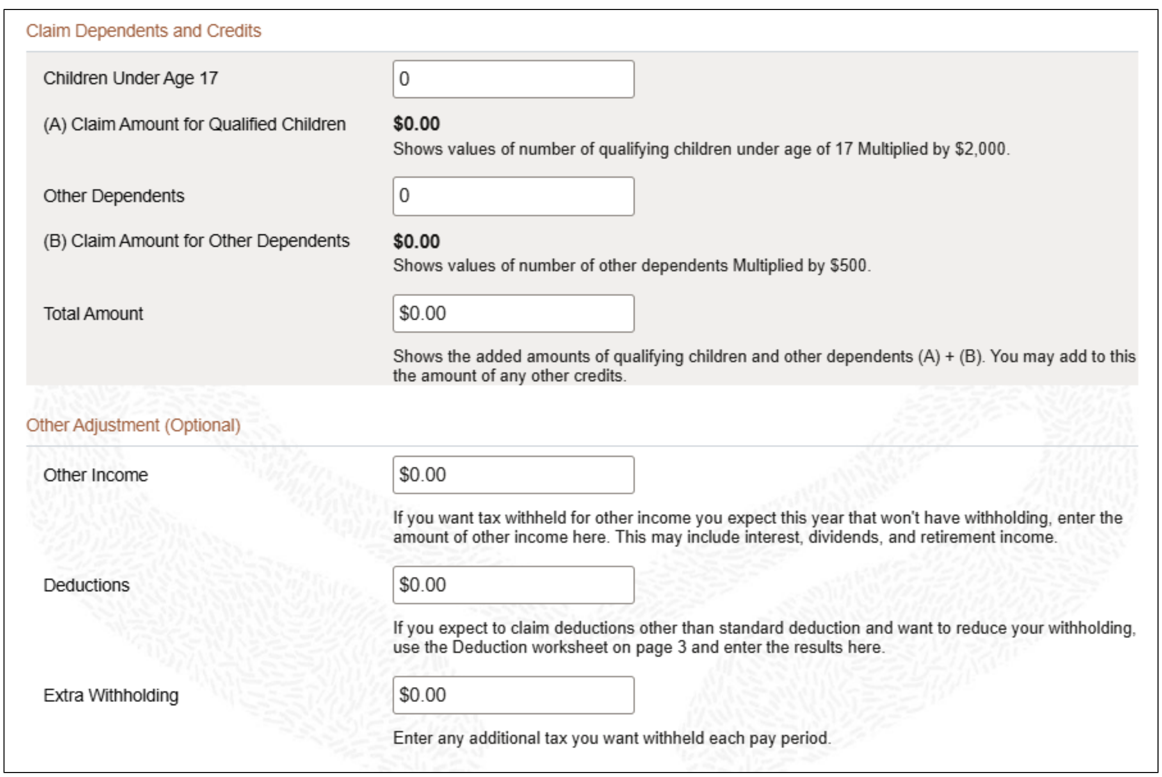
Navigation:

Select **Edit** on the federal tax withholding row on the Paycheck Modeler - Taxes page.

This example illustrates the fields and controls on the Model Federal Tax Withholding page (1 of 2).



This example illustrates the fields and controls on the Model Federal Tax Withholding page (2 of 2).



You can update federal tax information for the simulation, such as tax filing status, dependent claim and other withholding amounts.

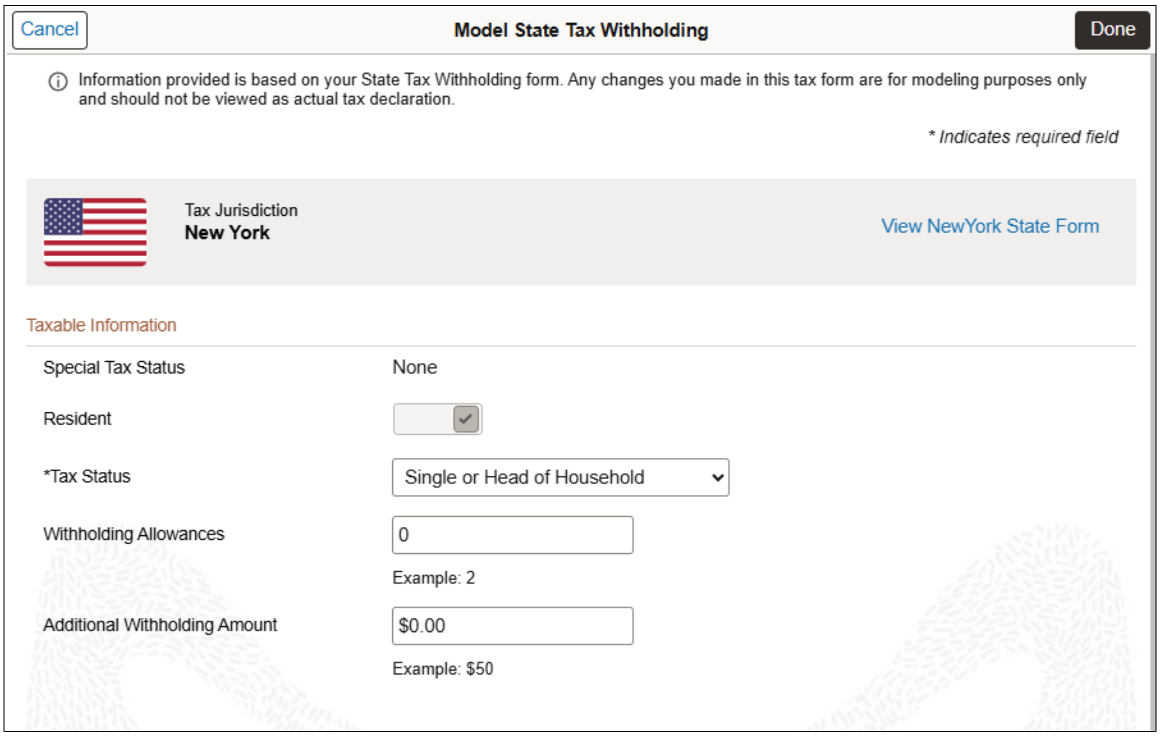
Model State Tax Withholding Page

Use the Model State Tax Withholding page (PY_MOD_ST_TAX_SCF) to modify state tax withholding information for the modeled paycheck calculation.

Navigation:

Select **Edit** on the state tax withholding row on the Paycheck Modeler - Taxes page.

This example illustrates the fields and controls on the Model State Tax Withholding page.



You can update state tax information for the simulation, such as tax filing status and additional withholding allowance amount.

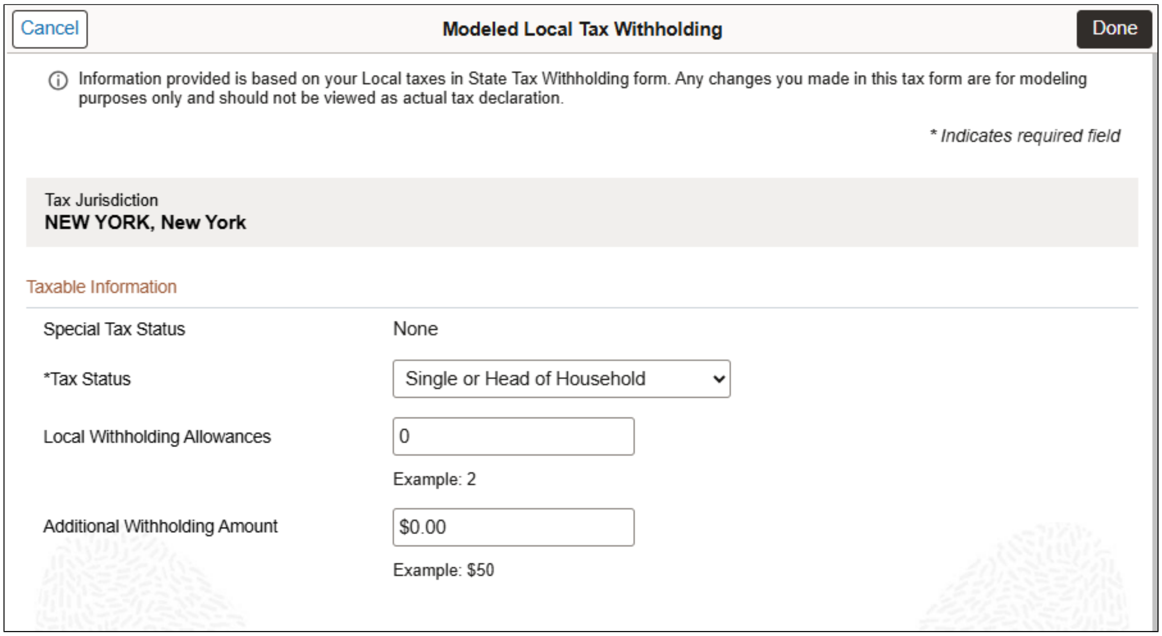
Modeled Local Tax Withholding Page

Use the Modeled Local Tax Withholding page (PY_MOD_LT_TAX_SCF) to modify local tax withholding information for the modeled paycheck calculation.

Navigation:

Select **Edit** on the local tax withholding row on the Paycheck Modeler - Taxes page.

This example illustrates the fields and controls on the Local Tax Withholding page.



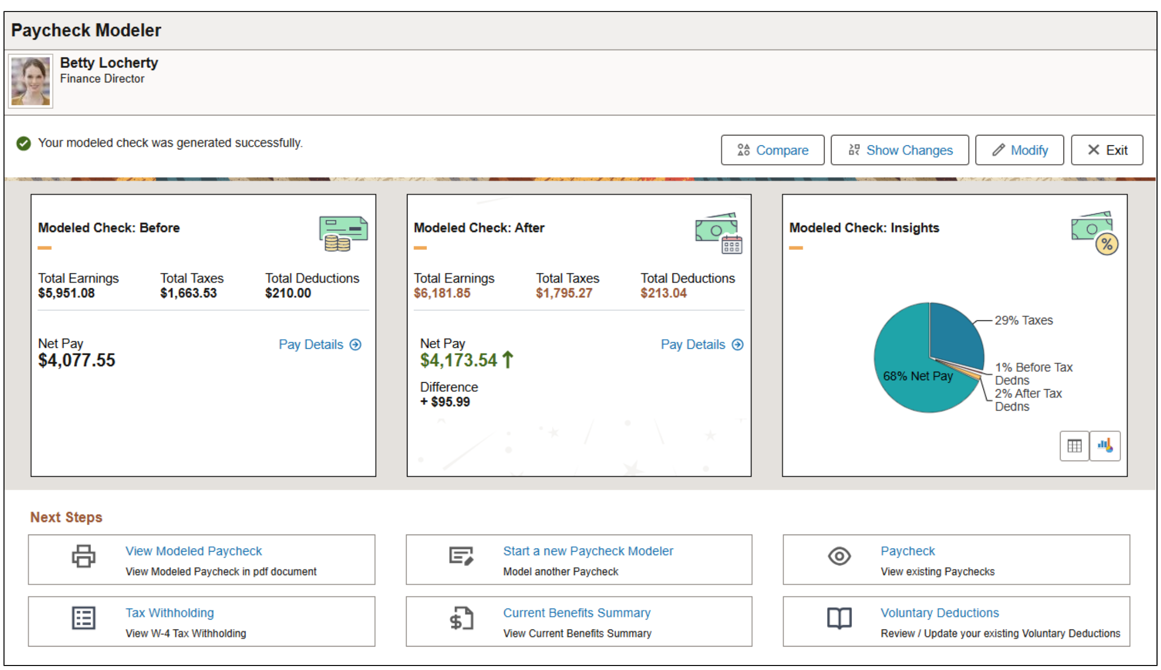
Paycheck Modeler - Results Page

Use the Paycheck Modeler - Results page (PY_MOD_RSLT_FL) to view the modeled paycheck results.

Navigation:

Select the **Calculate Check** button on a Paycheck Modeler page.

This example illustrates the fields and controls on the Paycheck Modeler - Results page.



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

Field or Control	***Description***
Compare	Select to view the side-by-side display of all earnings, deduction, and tax entries as well as the net pay amounts of the modeled check *before* and *after* the calculation on the Compare Modeled Check Page. Each updated entry has a *Modeled* tag to indicate that it was edited during the simulation. A *Recalculated* tag is attached to each entry that changed during the calculation of the modeled check.
Show Changes	Select to view the changes you made to earnings, deduction, and tax entries in the modeled check on the View Modeled Changes Page. The page shows the before and after values for each modeled entry and the net pay of the check.
Modify	Select to make further updates on Earnings, Deductions, and Taxes pages and calculate the paycheck again.
Exit	Select to leave Paycheck Modeler. Data updated during the session is not saved when you exit.

The **Modeled Check: Before** and **Modeled Check: After** cards display important amounts pertaining to the paycheck, such as total earnings, total deductions, total taxes, and net pay. Select the **Pay Details** link for a detailed view of all the entries and associated amounts included in the check on the Paycheck Details Page.

The **Modeled Check: Insights** card shows the percentage distribution of the modeled paycheck amounts in a pie chart or tabular format (which includes amount values).

These cards are configurable on the Configure Page Template Page.

Next Steps

The list of available actions (which are available for the PY_MOD_RSLT_FL page) are set up on the Configure Page Template Page.

Note: To access these actions, make sure popup windows are allowed in your browser.
The **Next Steps** section is display only for payroll administrators.

Field or Control	***Description***
View Modeled Paycheck	Select to view the modeled paycheck in PDF. The modeled paycheck file is non-negotiable and unofficial, with the word *Estimated* displayed as the watermark.
Start a new Paycheck Modeler	Select to start new modeling session with another paycheck.

Field or Control	***Description***
Paycheck	Select to view paychecks on the Paychecks Page.
Tax Withholding	Select to view or manage tax withholding information on the Tax Withholding Page.
Current Benefits Summary	Select for a summary view of your benefits information on the “Benefits Summary Page” (PeopleSoft Benefits Administration).
Voluntary Deductions	Select to view or manage voluntary deductions on the Voluntary Deductions Page.

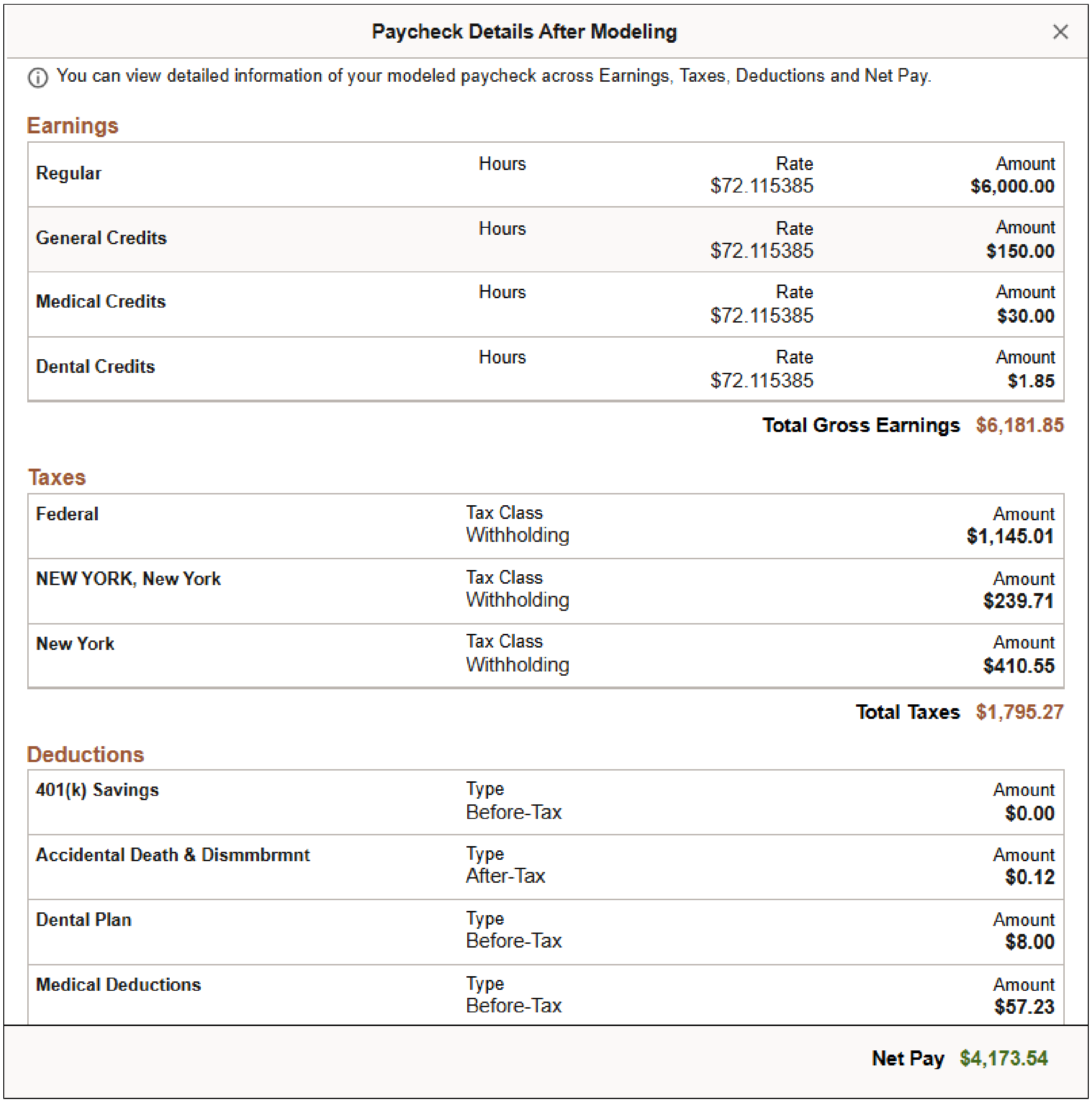
Paycheck Details Page

Use the Paycheck Details page (PY_MOD_CALRSLT_SCF) to view details of the corresponding paycheck.

Navigation:

Select the **Pay Details** link on the Paycheck Modeler - Results page.

This example illustrates the fields and controls on the Paycheck Details page.



You can select to view the details (for example, net pay, totals for earnings, deductions, and taxes, and individual entry amount) of either the original or modeled paycheck.

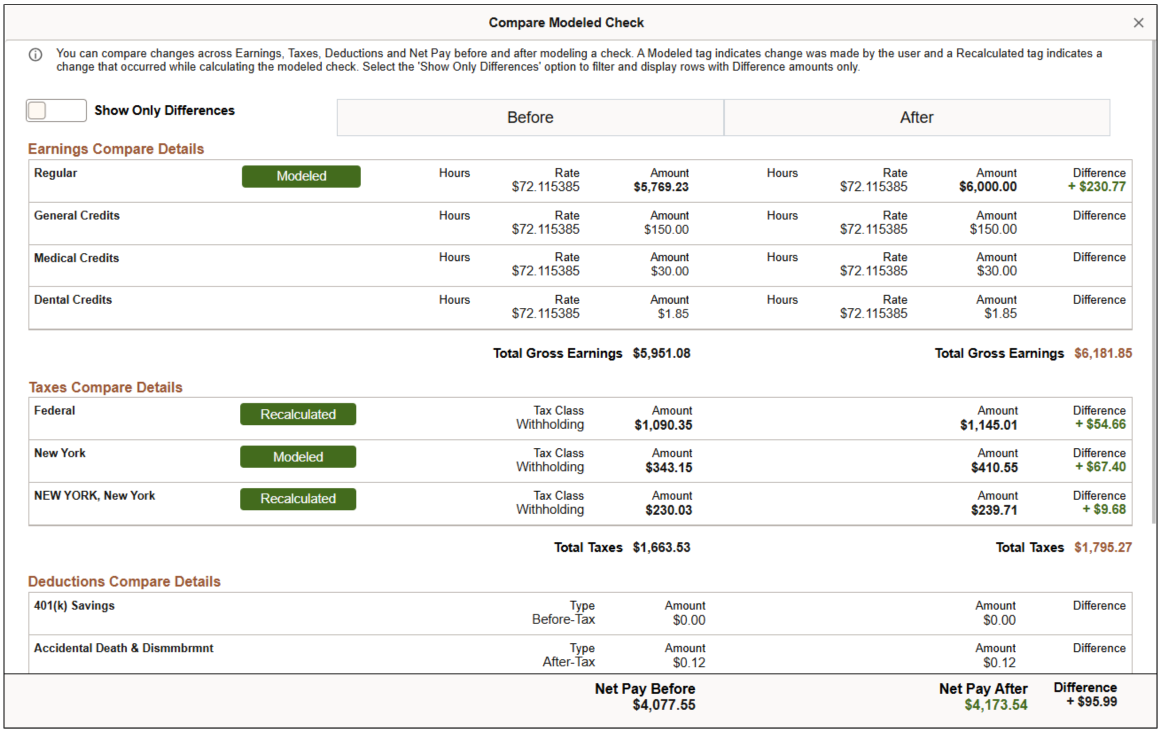
Compare Modeled Check Page

Use the Compare Modeled Check page (PY_MOD_CMP_RSLT_FL) to view paycheck details before and after the paycheck modeling process.

Navigation:

Select the **Compare** button on the Paycheck Modeler - Results page.

This example illustrates the fields and controls on the Compare Modeled Check page.



This page enables you to compare the details of the original and modeled paychecks side-by-side.

Field or Control	*Description*
Show Only Differences	Use the slider to update the page to show rows with difference amounts only, in other words, rows that are *Modeled* or *Recalculated.*

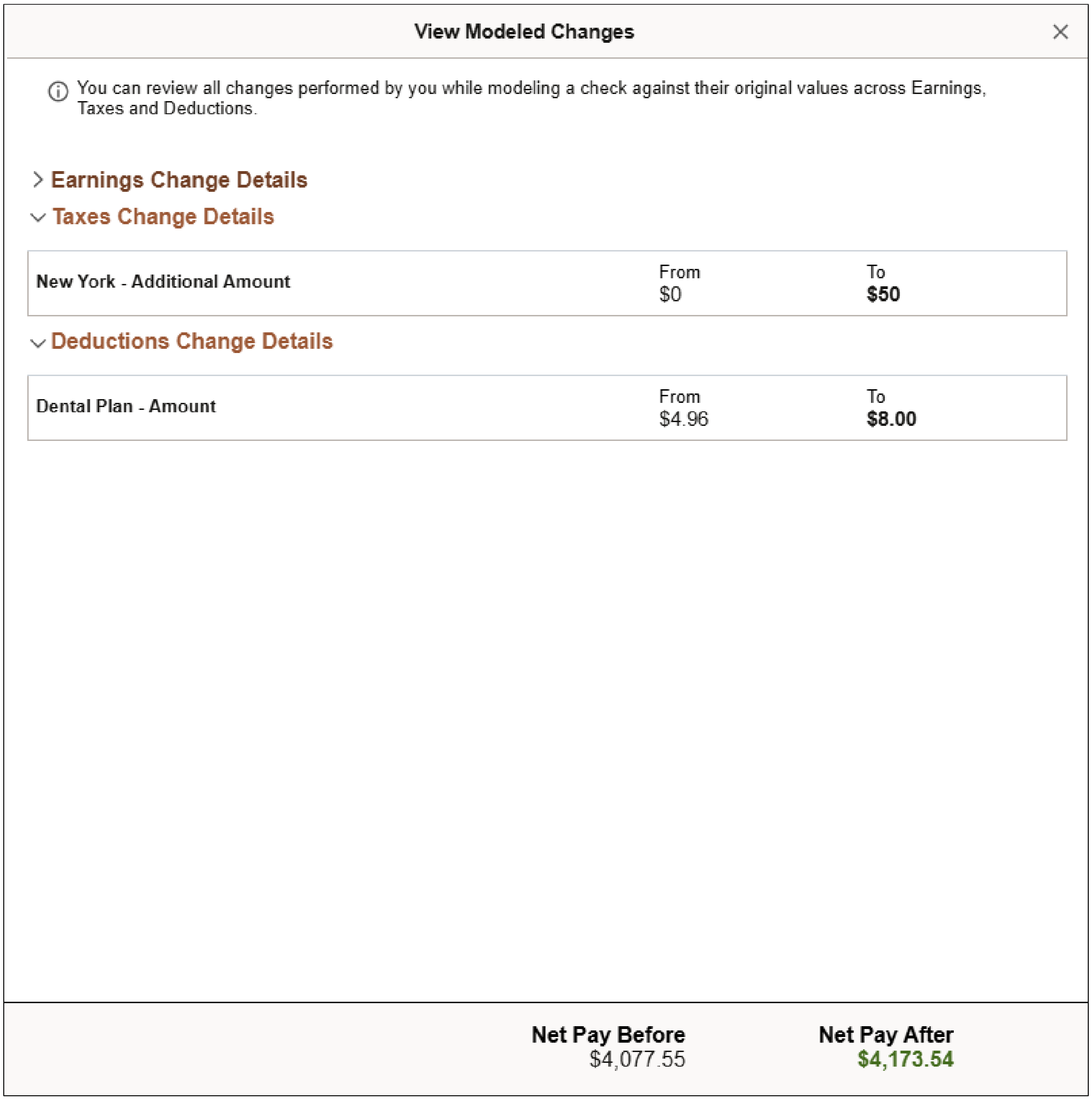
View Modeled Changes Page

Use the Modeled Changes page (PY_MOD_AUDIT_SCF) to view changes made in the paycheck modeling process.

Navigation:

Select the **Show Changes** button on the Paycheck Modeler - Results page.

This example illustrates the fields and controls on the View Modeled Changes page.



This page lists the changes (*From* and *To* values) that were made for the modeled paycheck by section, if applicable.

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 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.

Voluntary Deduction Access During PreBoarding

Future hires or rehires can add or update their voluntary deductions on the Voluntary Deductions page if the option is enabled on the "Payroll for NA Installation Page" (PeopleSoft Payroll for North America). When saving the information, the system validates that the deduction start date is equal to or greater than the hire date of the future hire or rehire.

For employees that have future jobs with different companies, they can select and update voluntary deductions for each of the companies on the Voluntary Deductions page.

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 Page	PY_IC_DED_LIST	Add, update, or view 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. For Fluid Paycheck Modeler, see (Fluid) Working With Paycheck Modeler.
Pay Inquiry	PI_IC_CHK_DATA	View the paycheck information for any confirmed pay period. See Managing and Viewing Payroll Information.

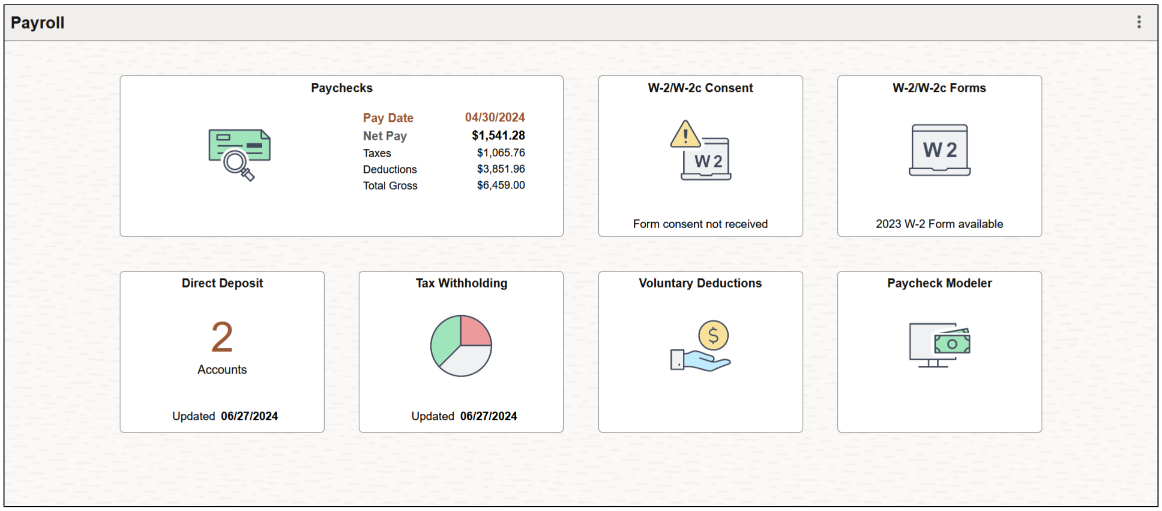
Additional Self-Service Transactions Accessible from Payroll Tile

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

- Voluntary Deductions.
- (USA) Paycheck Modeler.
- (Payroll Interface) 3rd Party Pay Inquiry.

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

This example illustrates additional self-service transactions that are accessible from the Payroll tile.



Related Links

Using the PeopleSoft Fluid User Interface to View Paychecks
(USA) 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 Withholding Certificate Page	PY_IC_W4_DATA_2020	Change tax data.
(USA) W-2 Reissue Request Page	PY_IC_W2_DATA	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 Withholding Certificate 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 Withholding Certificate 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

Working with Payroll Assistant

Setting Up Payroll Assistant

This topic provides an overview of the Payroll Assistant, and discusses how to set up the chatbot for Payroll.

Understanding Payroll Assistant

A skill is a computer program that maintains a conversation with a user in natural language, understands the intent of the user, and sends a response based on business rules and data of the organization.

The Payroll Assistant is a PeopleSoft skill that uses the Oracle Digital Assistant (ODA) platform for interacting with users to help them find answers and perform certain tasks. It is designed to assist users with payroll-related inquires through a conversational interface, and is available for both desktop and mobile users.

Using simple phrases and keywords, employees in the US and Canada can ask the Payroll Assistant questions about their:

- Paychecks or paycheques
- Bank account information
- Employee’s withholding
- Voluntary deductions
- Pay schedules
- Year-end forms or year-end slips
- Garnishments
- Payroll contact information

Video: Image Highlights, PeopleSoft HCM Update Image 36: Chatbots for PeopleSoft HCM

How To Enable the Payroll Assistant

Here are the high-level steps for enabling the Payroll Assistant for self-service employees:

1. Grant users access to the Payroll Assistant by assigning them the *NA Payroll Chatbot User* role.
2. Using HPY_CHAT_ASST that is delivered with the system, edit and add the bot app ID from the ODA channel.
    - Navigate to **Enterprise Components** > **Chatbot Configurations** > **Bot Definitions**.

- Click the **Edit** button for HPY_CHAT_ASST (Payroll Assistant) and enter the Bot App ID value from the ODA channel.

Oracle delivers the default branding template for the Payroll Assistant (the delivered template is *NA Payroll Branding Template*). No changes are required.

3. (Optional) Modify delivered categories for earnings, deductions and garnishments on the "Category Selection Page" (PeopleSoft Payroll for North America), if necessary.

Refer to the Payroll for North America Chat Category Setup technical brief (doc ID: 2715964.1) on My Oracle Support for general guidelines on how to configure chat category setup for Payroll Assistant.

Related Links

PeopleSoft PICASO Button
"Understanding Skills" (Enterprise Components)

PeopleSoft Employee Digital Assistant

PeopleSoft Intelligent Chatbot ASsistant from Oracle (PeopleSoft PICASO) is a consolidated, single-point access solution where your employees can ask questions spanning multiple PeopleSoft applications like Absence, Benefits, Employee Directory, Expenses, North American Payroll, and more. For information on PeopleSoft PICASO, see "Understanding PeopleSoft PICASO" (Enterprise Components).

With Tools 8.59, the Skill services (such as Absence, Employee Directory, and so forth) are REST API enabled to manage the Oracle Digital Assistant instances. For information on REST API, see "Understanding REST API Endpoints for PeopleSoft" (Enterprise Components) and "Understanding REST API Endpoints for PeopleSoft Payroll for North America Services (payrollbankingyearendforms)" (Enterprise Components).

Interacting with Payroll Assistant

This topic provides examples of user interactions that are supported by the Payroll Assistant.

Pages Used to Interact with Payroll Assistant

Page Name	***Definition Name***	***Usage***
PeopleSoft PICASO Button	N/A	From the PeopleSoft web-based application, launch the Employee Digital Assistant to access the various skills, such as the Payroll Assistant.
Payroll Assistant Page	EOCB_CLIENT_FL	Begin the interaction with the Payroll Assistant for quick answers to queries about payroll.

PeopleSoft PICASO Button

Use the PeopleSoft PICASO button from the PeopleSoft web-based browser to launch the Employee Digital Assistant and access various skills.

Navigation:

The **PeopleSoft PICASO** button appears in the bottom right corner of any PeopleSoft web application homepage, dashboard, or fluid application page for employees and managers.

This example illustrates the PeopleSoft PICASO button.

Video: PeopleSoft Payroll Chatbot

Payroll Assistant Page

Use the Payroll Assistant page to get quick answers to your payroll-related questions.

Navigation:

Select the PeopleSoft PICASO Button from any fluid homepage to open the Employee Digital Assistant, which includes the Payroll Assistant.

Note: You must be a member of the *NA Payroll Chatbot User* role to access the Payroll Assistant through the Employee Digital Assistant.

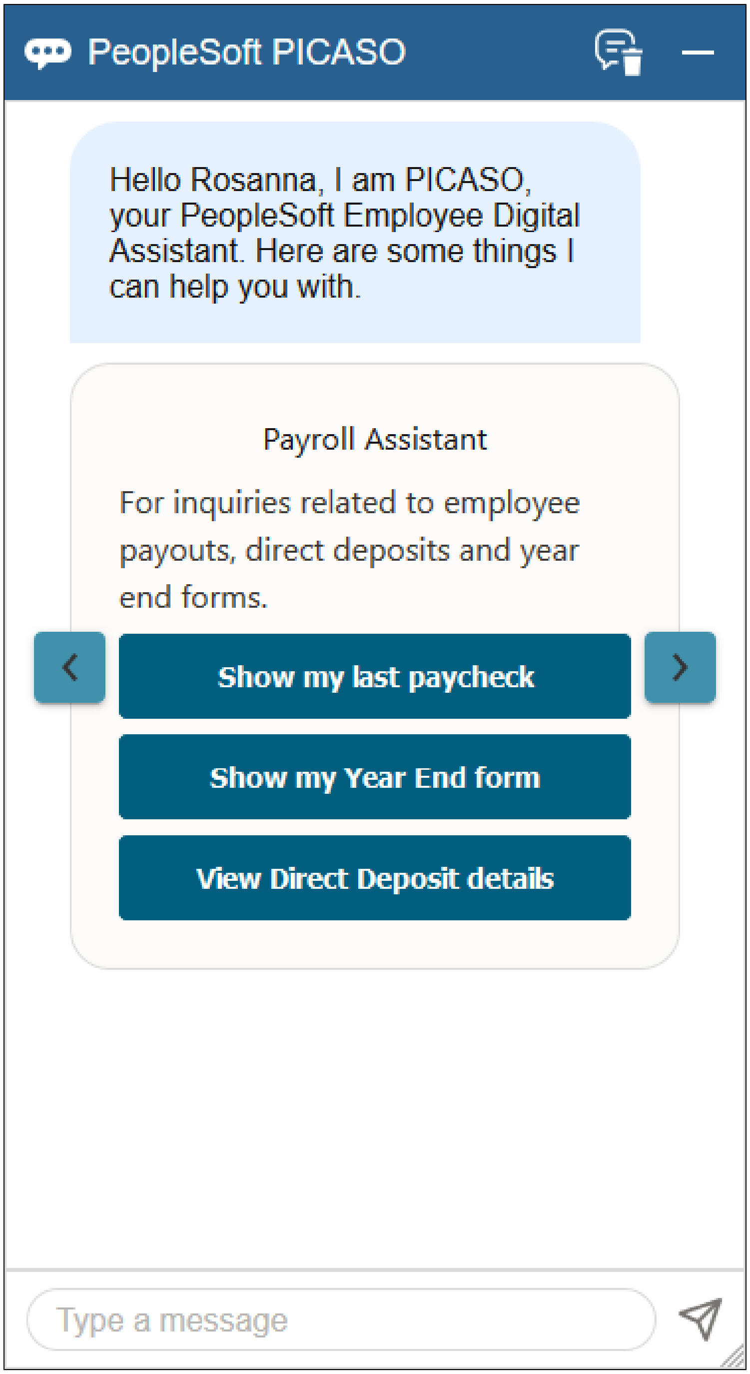
Start a conversation by entering a search string for your inquiry. This table lists the types of payroll-related questions or requests that Payroll Assistant supports:

Payroll Information Type	***Inquiry Examples***
Paycheck or paycheque	“View <month> paycheque” ”Leave balance” “Show my taxes” “Bonus” “net pay”
Bank information	“Direct deposit info” “Add direct deposit”

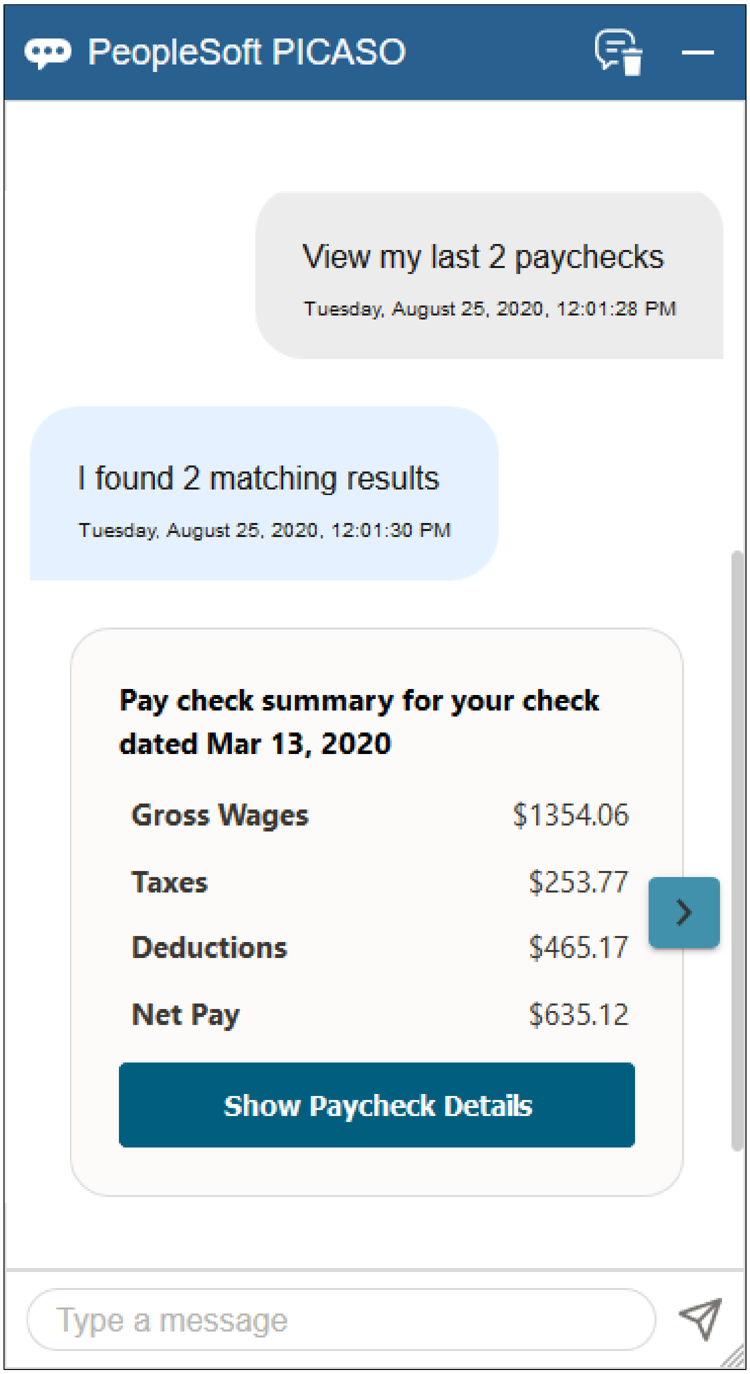
Payroll Information Type	***Inquiry Examples***
Voluntary deduction	“Add voluntary deduction” “Change voluntary deduction”
Pay schedule	“When is my next paycheck”
Year-end form or year-end slip	“Show w-2” “Show t4” “View consent”
Garnishment	“Who is garnishing my paycheck” “How much was garnished from my last check”
Employee’s withholding	“w4”
Payroll contact information	“Contact my rep”

You can add keywords in inquires (for example, “View March paychecks” or “View last 2 paychecks”) for more accurate results. For generic inquiries (for example, “View paycheck”), the system returns the most current data in the response, in this case, the latest paycheck available in the system. If multiple results are found, use arrow buttons to view the matching results horizontally.

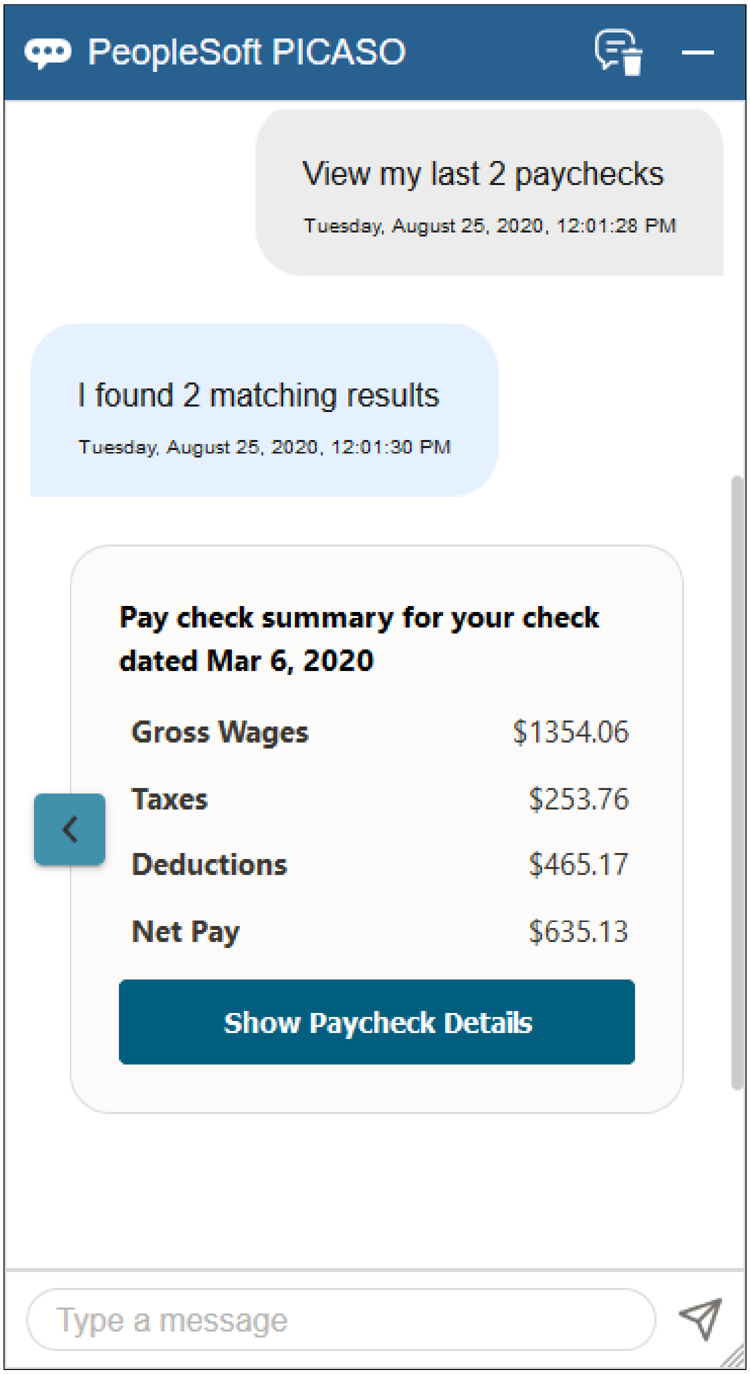
This example illustrates the Employee Digital Assistant showing the Payroll Assistant card. The card displays action buttons that users can select to ask questions about their payroll.



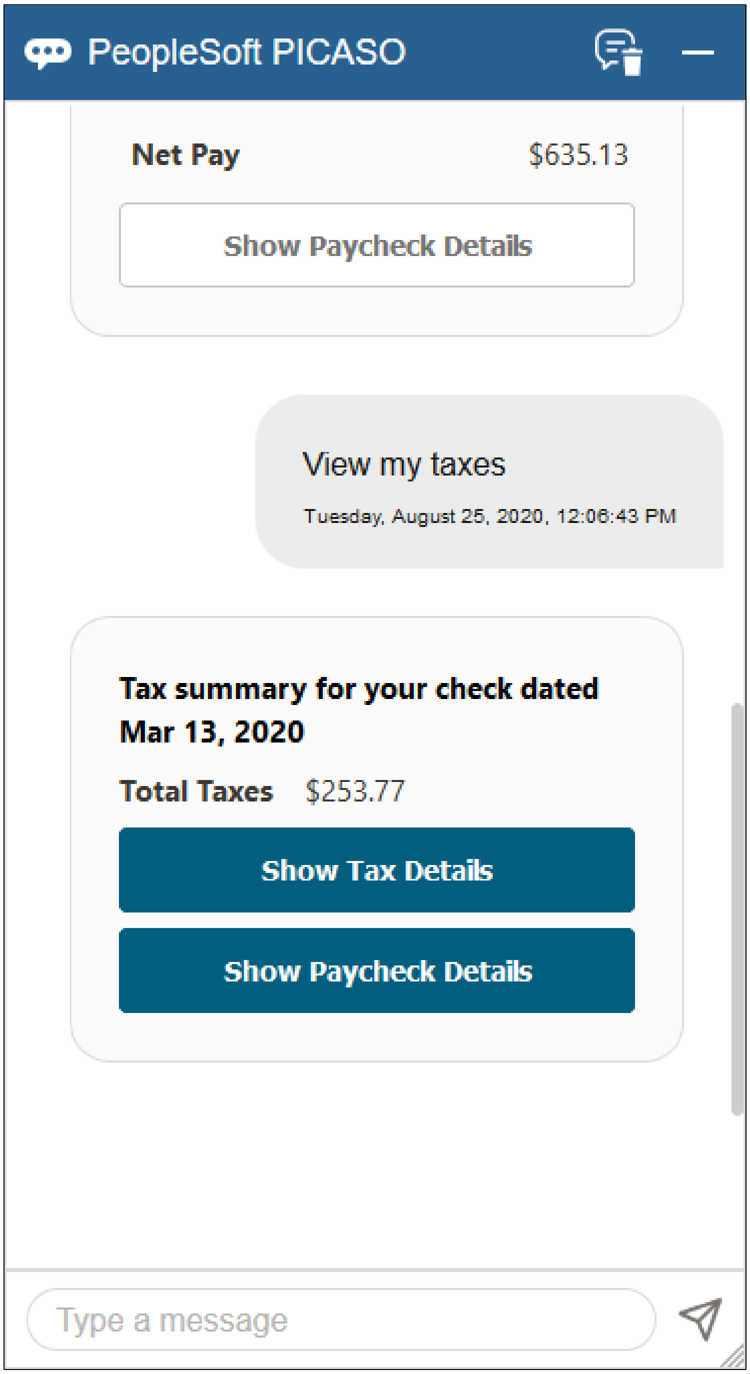
This examples displays the first of the multiple results that were found.



This examples displays the last of the multiple results that were found.



This example displays the tax total of the paycheck.

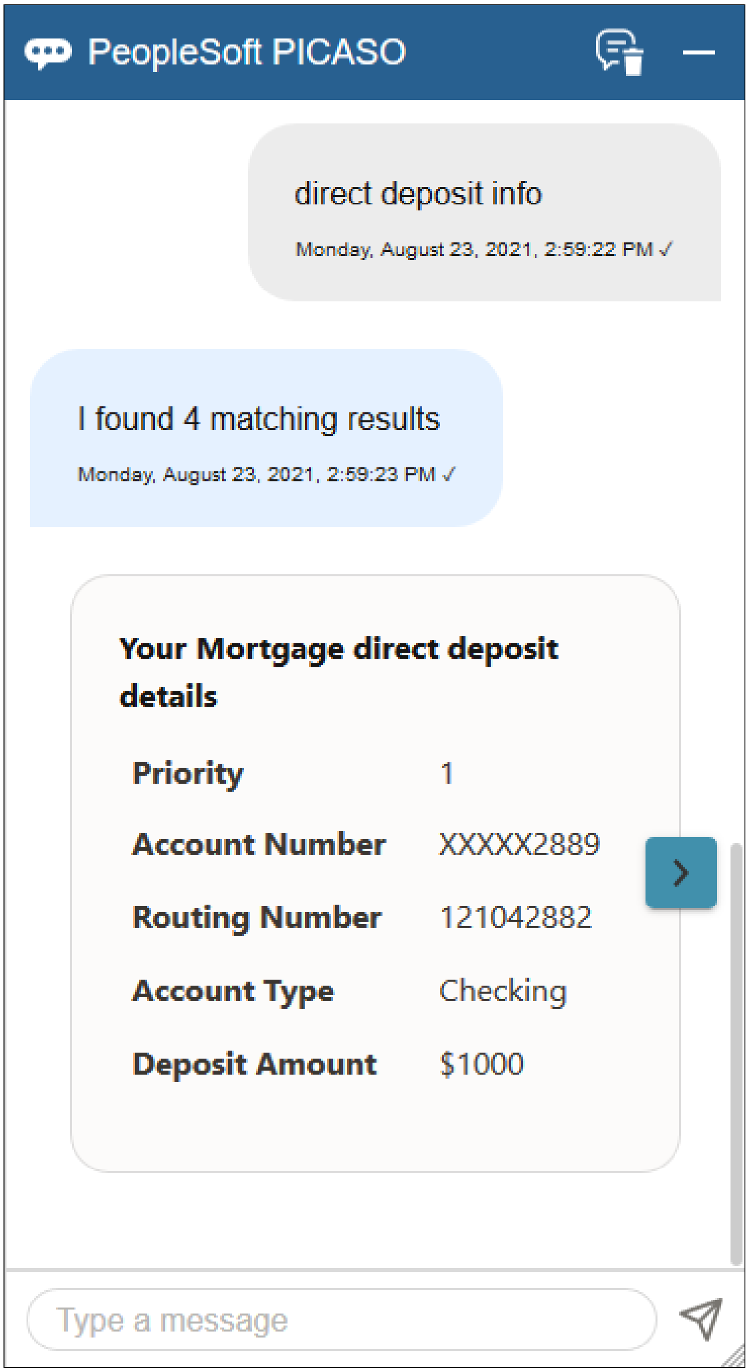


If multiple results are displayed, use arrow buttons to scroll through results horizontally. Based on the nature of the inquiries, one or more of these buttons can be displayed to suggest further actions.

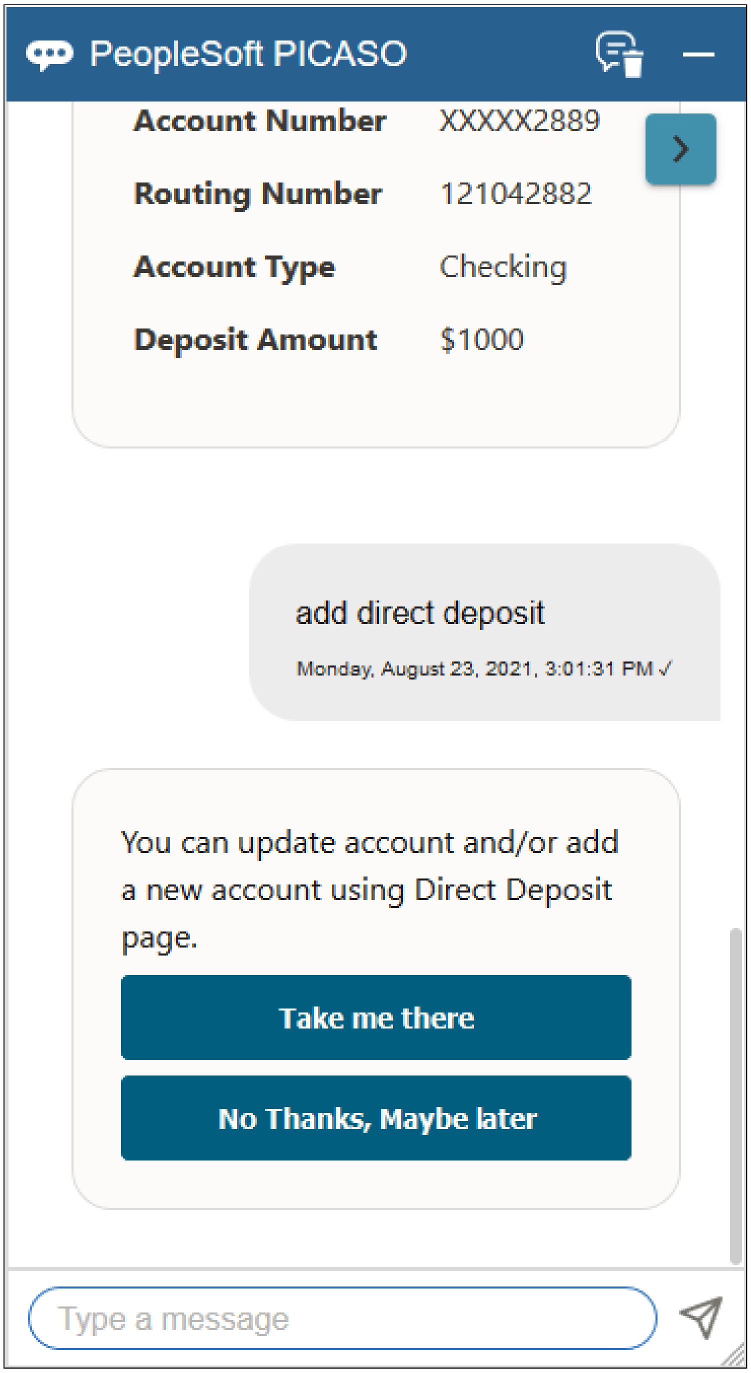
Field or Control	***Description***
Show Tax Details or **Show Deduction Details**	Select to view additional tax or deduction details.

Field or Control	***Description***
Show Paycheck Details or **Show Paycheque Details**	Select to view the PDF version of the paycheck (or paycheque) in a new browser tab. This button appears if the PDF file already exists in the system for the employee.
View Self Service Paycheck	Select to view the list of Fluid paychecks on the Paychecks (or Paycheques) page (PY_IC_PI_LIST_FLU) in a new browser tab.

This example displays the response for an inquiry about direct deposit (1 of 2).

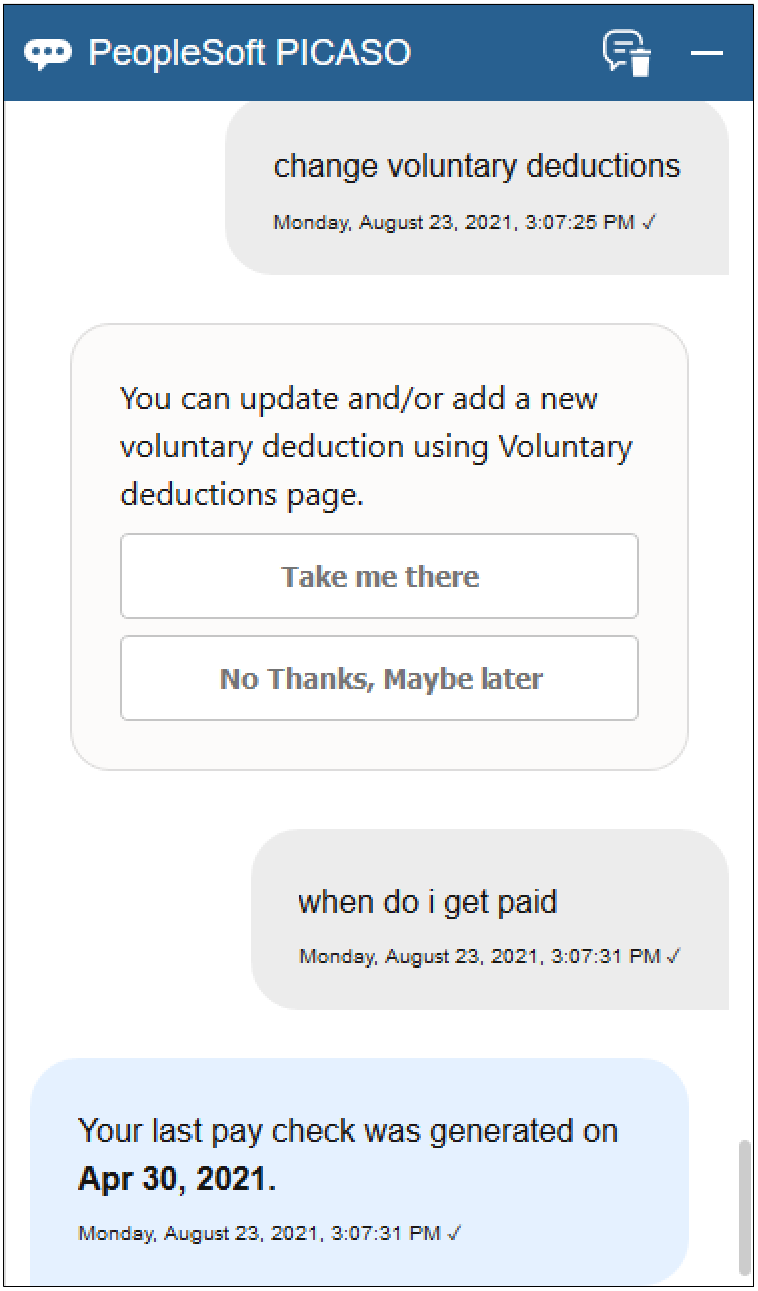


This example displays the response to user's request for adding a direct deposit account (2 of 2).



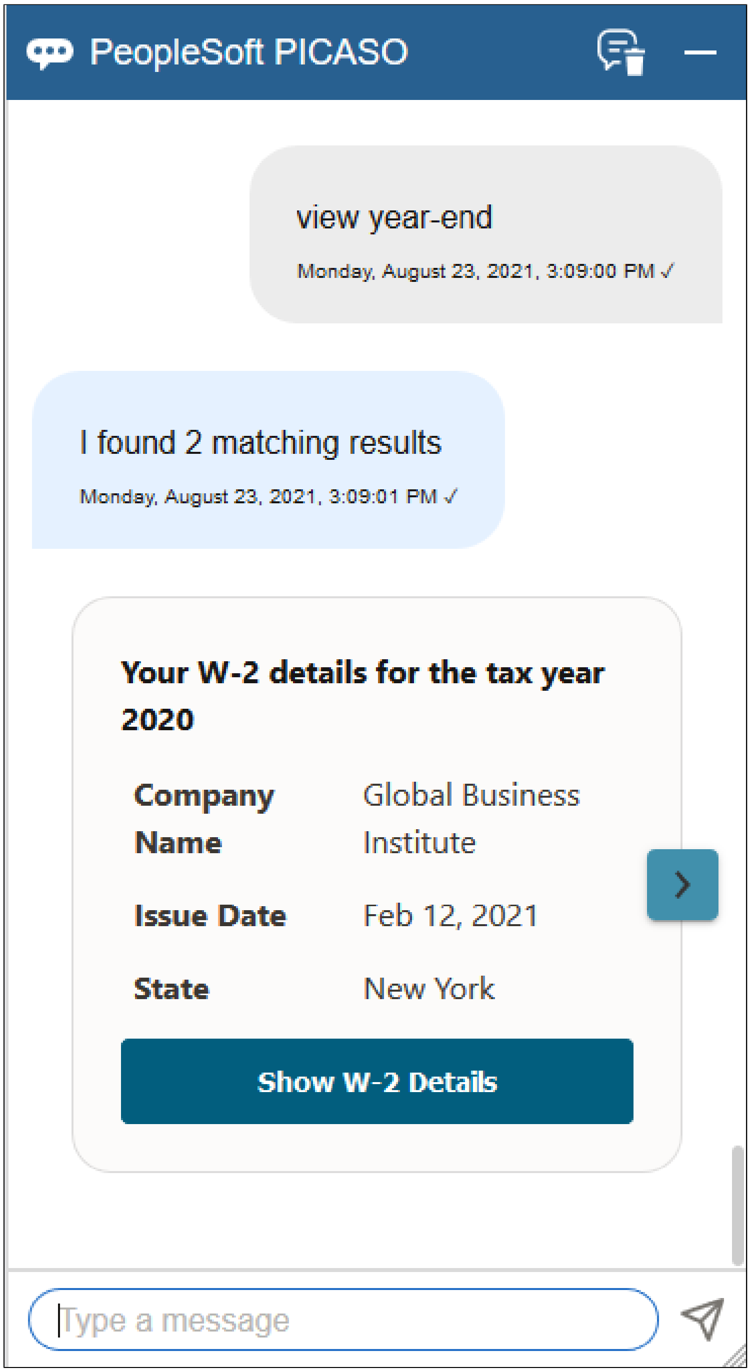
Field or Control	***Description***
Take me there	Select to access the Direct Deposit page in a new browser tab to add or update direct deposit information.

This example displays the system's response to user's request for updating voluntary deductions and question about the pay schedule.



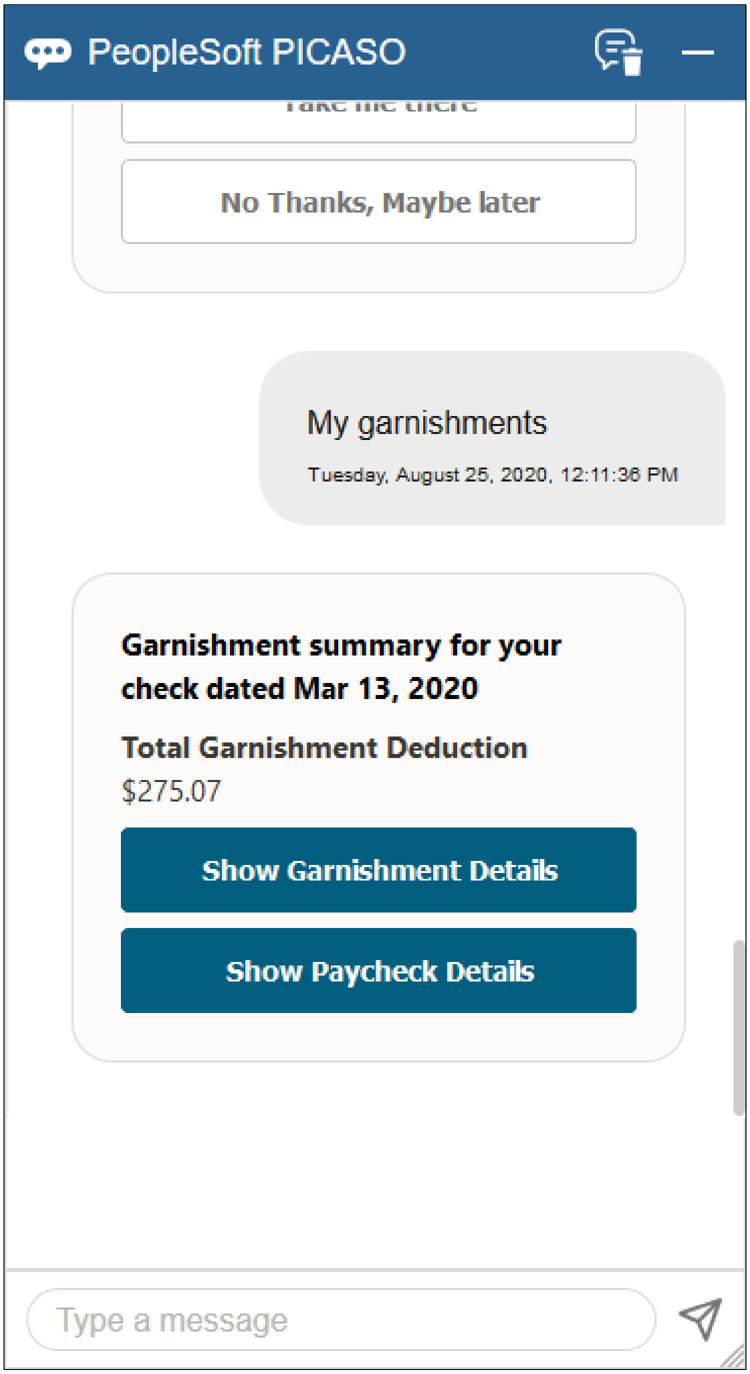
Field or Control	Description
Take me there	Select to access the Voluntary Deductions page in a new browser tab to add or update voluntary deductions.

This example displays the response to user’s question about year-end details.

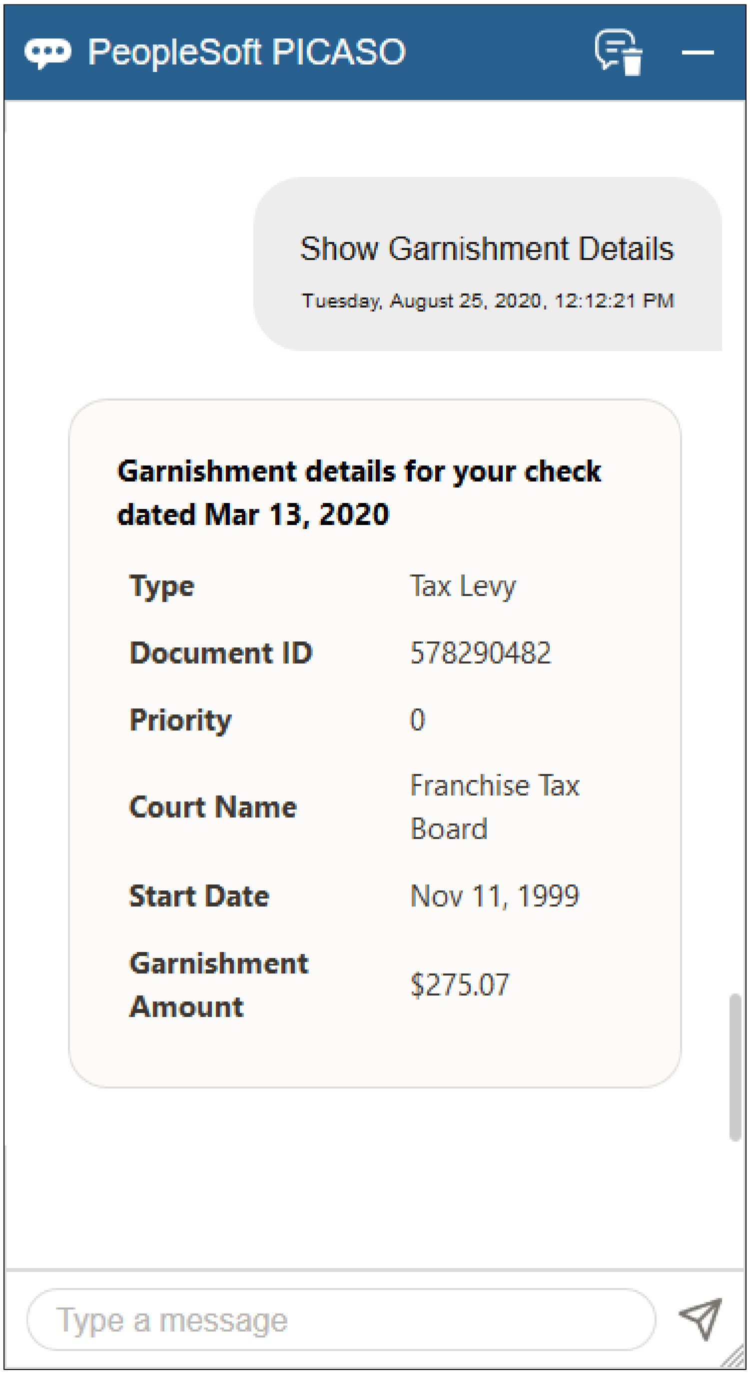


Field or Control	*Description*
Show T4 Slip Details, **Show RL Slip Details**, or **Show W-2 Details**	Select to show the PDF version of the corresponding year-end form or year-end slip in a new browser tab.

This example displays the response regarding user's garnishments.

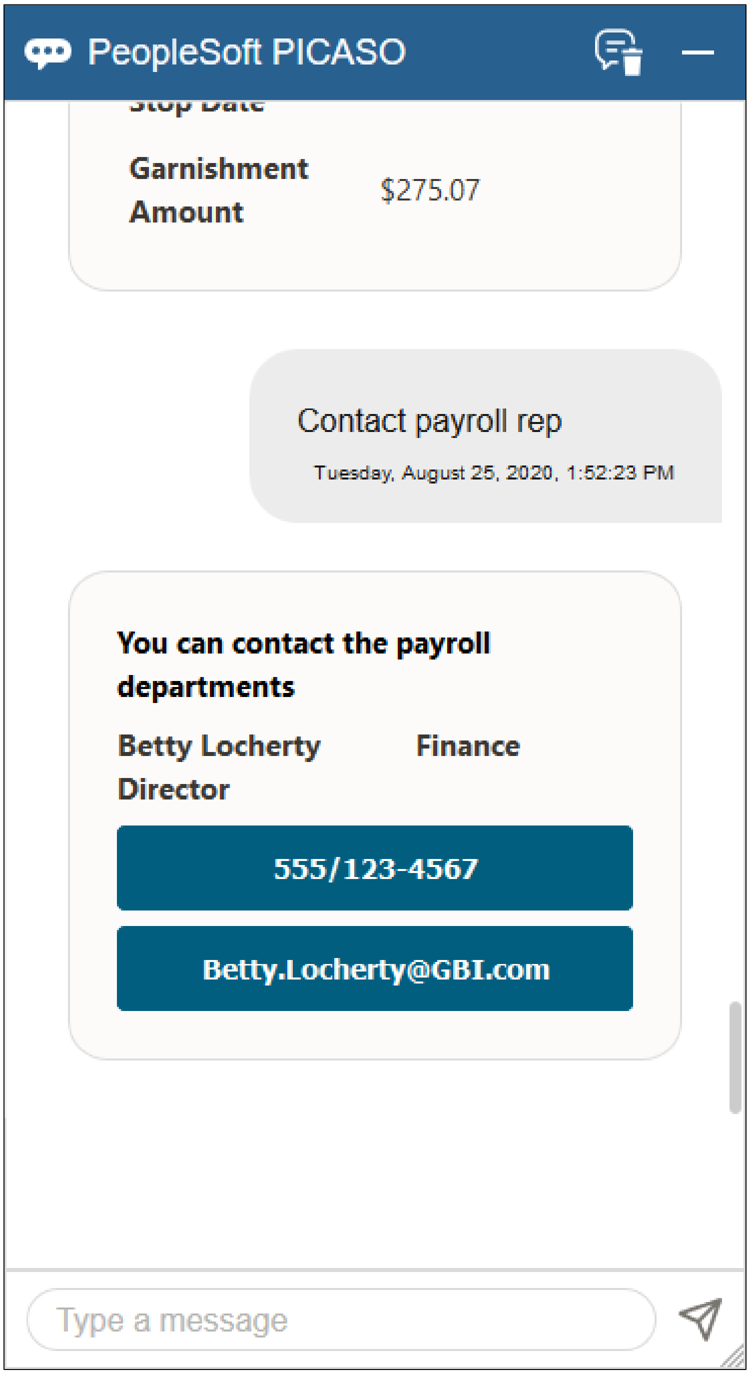


This example displays details of the found garnishment.

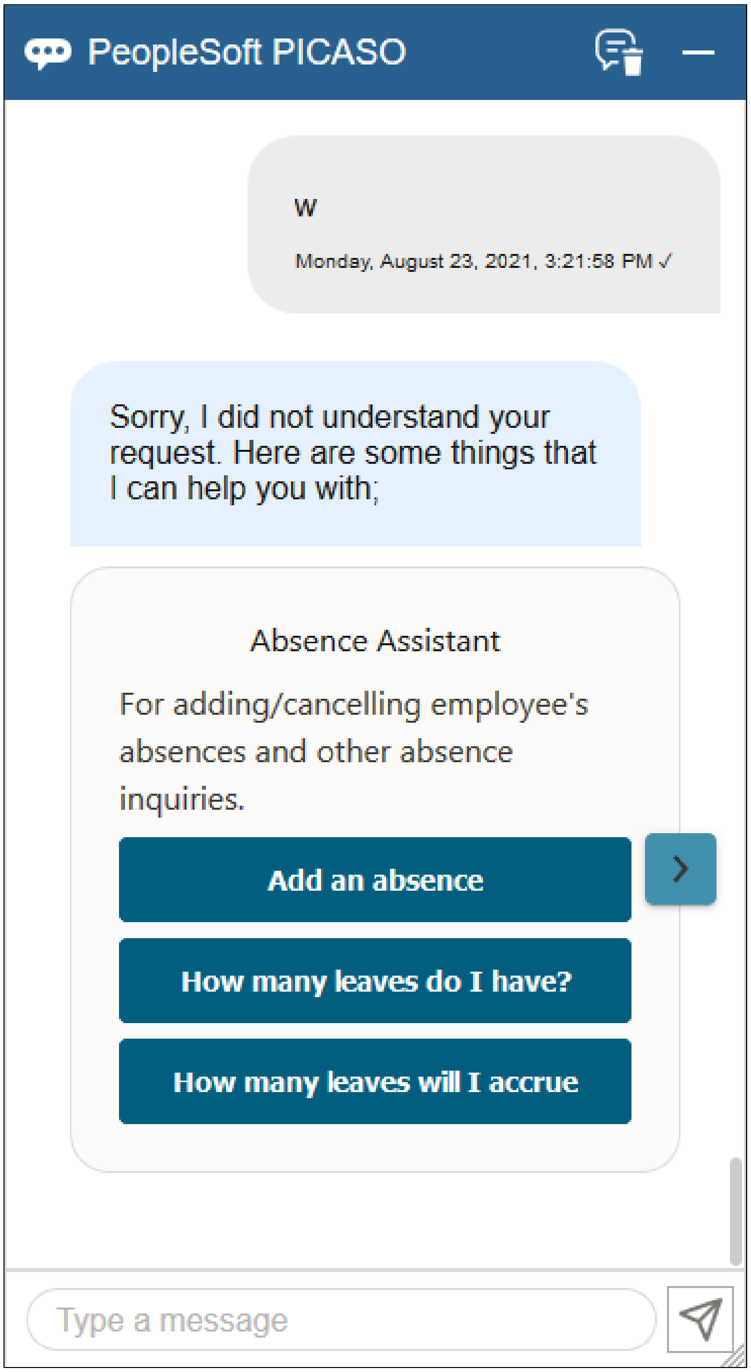


Field or Control	***Description***
Show Garnishment Details	Select to view additional garnishment details.

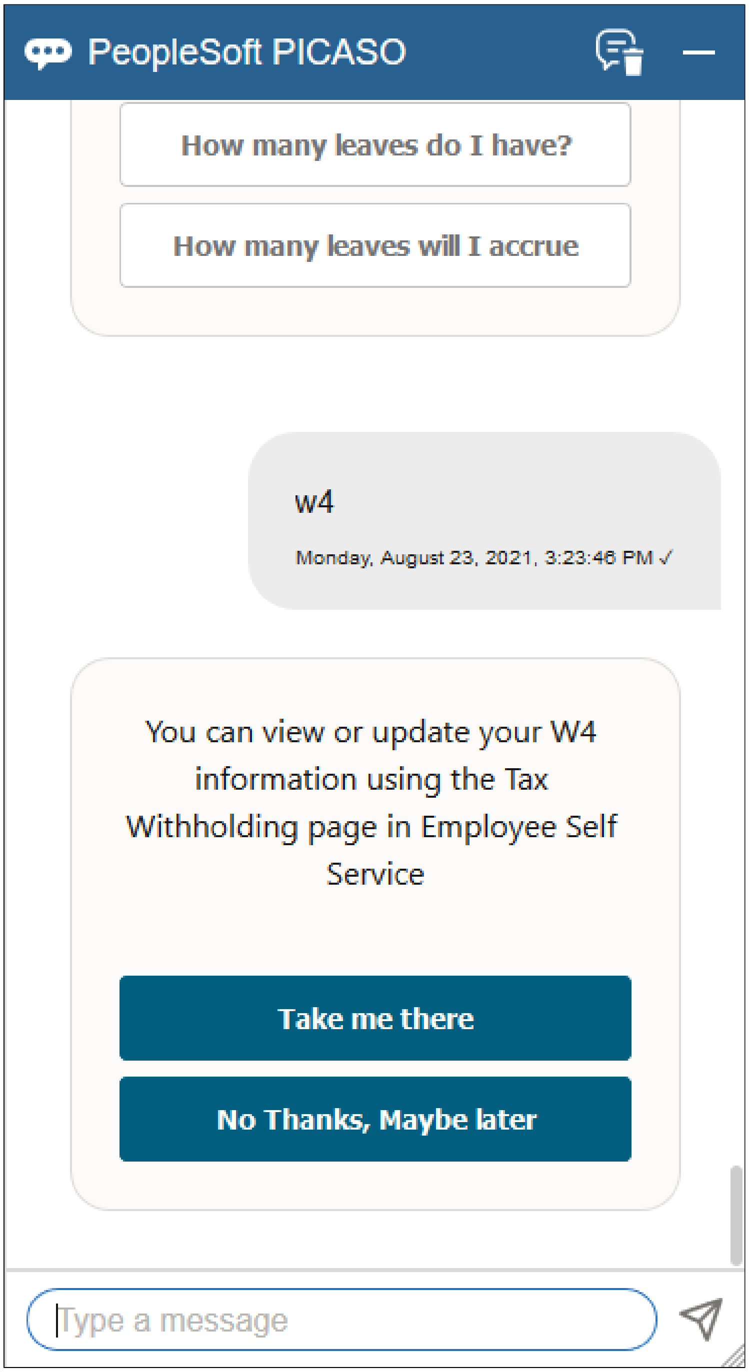
This example displays the result of an inquiry about payroll contact information.



This example displays the system's response when an inquiry cannot be resolved.



This example displays the system's response after the rephrased inquiry was resolved successfully.



Field or Control	***Description***
Take me there	Select to access the Tax Withholding page in a new browser tab to view or update tax withholding information.

Field or Control	***Description***
No thanks, Maybe later	(optional) Select to continue the conversation by entering the next question in the text field. Or, simply enter the next question without using this button. To leave the conversation, select the Close widget button on the top right corner of the Employee Digital Assistant. The chat history remains when you open it again.
Help	Select to see the card of the last skill with which you interacted.
Take me to Self Service	Select to access the Paychecks (or Paycheques) page in Employee Self Service on a new browser tab. This button appears when the system is unable to identify the information requested, and redirects users to their paychecks (paycheques) to find the information.

Chapter 5

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.

  Note: This page has been replaced by the Banking page in Fluid. For more information, see Using the PeopleSoft Fluid User Interface for Self Service Banking.

- Pay Distribution Instructions (GP_SS_EE_NPD).

  Employees can define their net pay distribution requirements.

  Note: This page has been replaced by the Payment Distribution page in Fluid. For more information, see Using the PeopleSoft Fluid User Interface for Self Service Banking.

- 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.

  Note: This page has been replaced by the Payslips page in Fluid. For more information, see Using the PeopleSoft Fluid User Interface to View Payslips.

- 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).

  Note: This page has been replaced by the Payslips page in Fluid. For more information, see Using the PeopleSoft Fluid User Interface to View Payslips.

- (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" (Application Fundamentals)

"Defining Banks and Branches" (PeopleSoft Global Payroll)

Updating Personal Bank Account Information

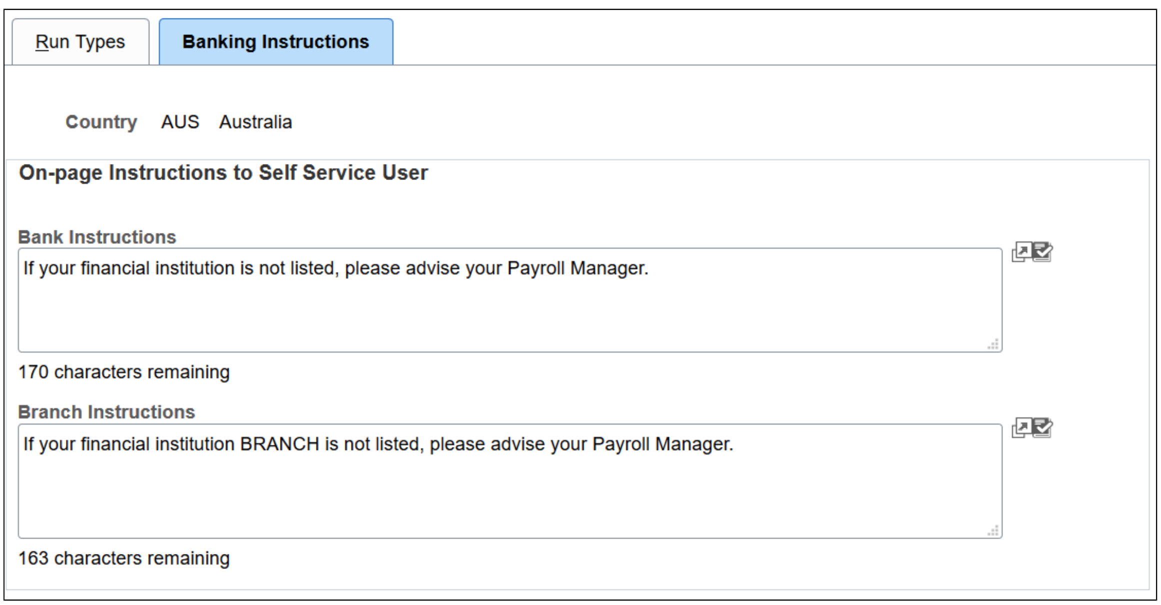
Banking Instructions Page

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** > **Define Banking Options** > **Banking Instructions**

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



Field or Control	***Description***
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*.

Field or Control	*Description*
(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. **Note:** This page has been replaced by the Banking page in Fluid. For more information, see Using the PeopleSoft Fluid User Interface for Self Service Banking.
Bank Location and Account Type	GP_SS_EE_BANK_CTRY	Enter the country where the bank is located and select the account type.

Page Name	***Definition Name***	***Usage***
(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.
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.

   ---
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.

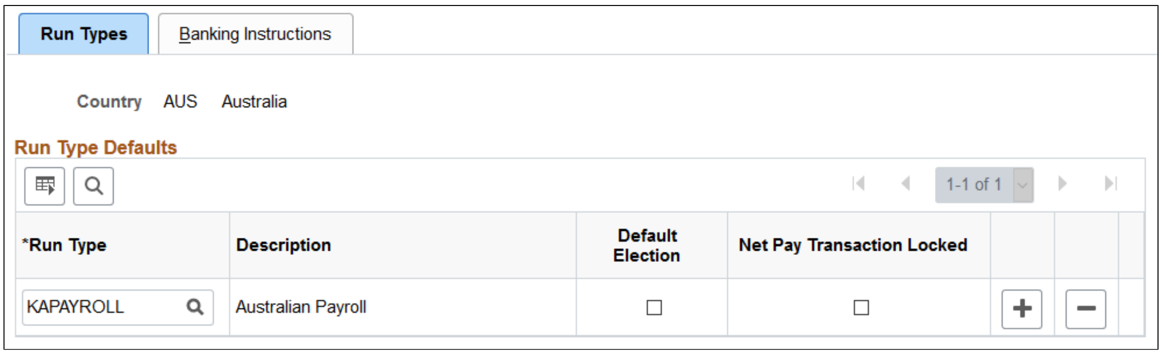
Run Types Page

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** > **Define Banking Options** > **Run Types**

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



Field or Control	***Description***
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.

Field or Control	Description
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.

Page Name	Definition Name	Usage
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.
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.

Note: Pages listed below are classic self service pages for reviewing, editing, and adding bank account and payment distribution information. These page are desupported, which means that while they can still be used, Oracle will no longer provide bug fixes or updates for them. Replacement pages are available in Fluid. For more information, see Using the PeopleSoft Fluid User Interface for Self Service Banking.

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*.

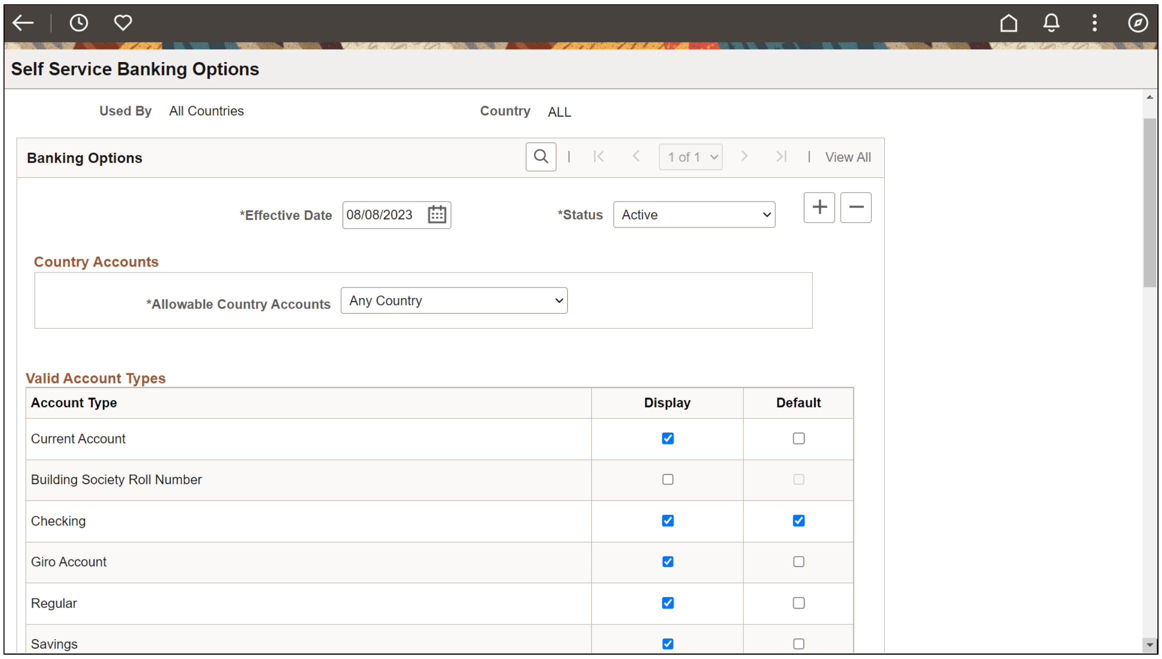
Self Service Banking Options Page

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.

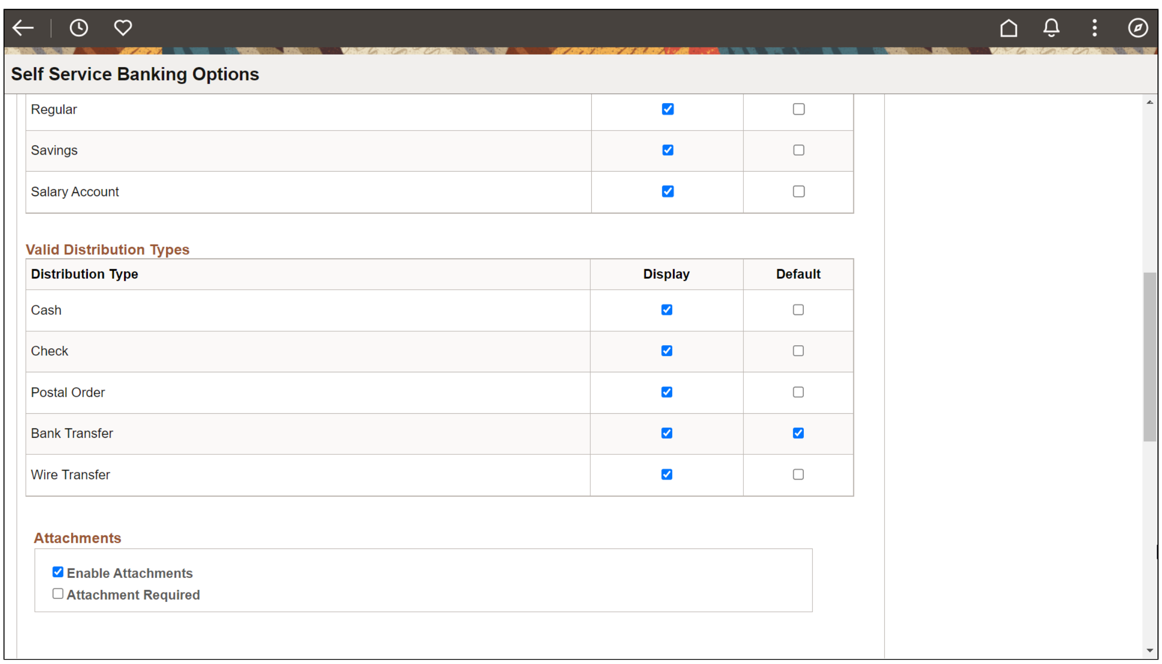
Navigation:

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

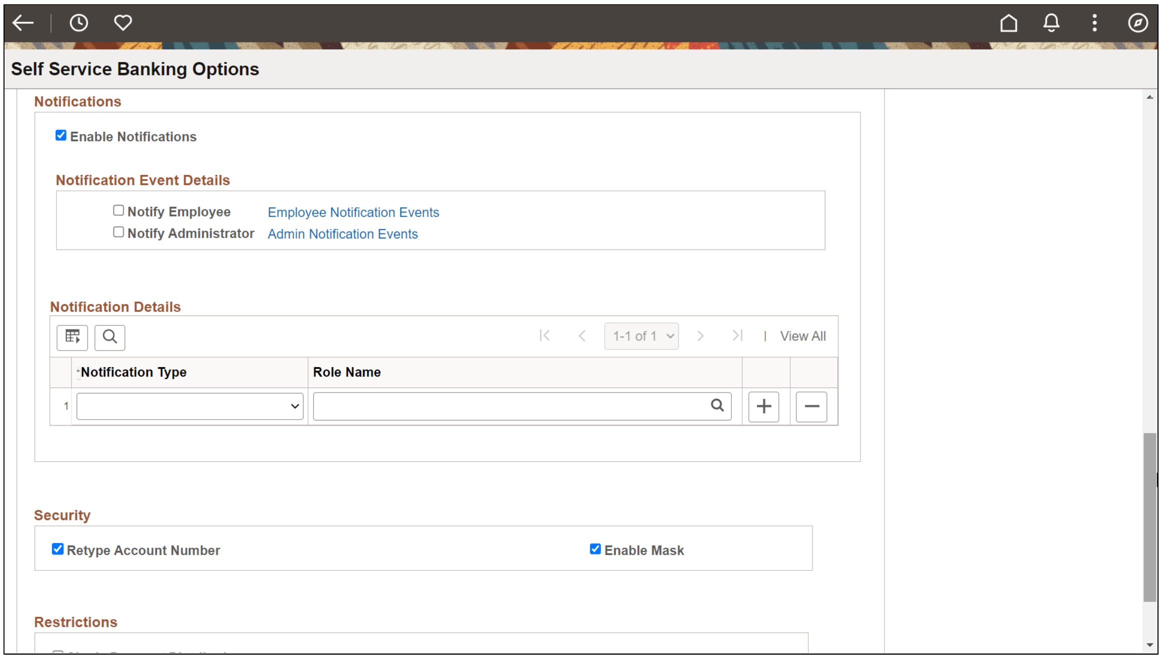
This example illustrates the fields and controls on the Self Service Banking Options page.



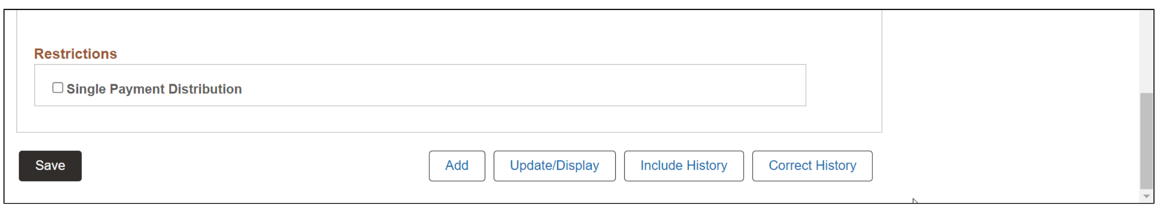
This example illustrates the fields and controls on the Self Service Banking Options page.



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



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



Country Accounts

Field or Control	***Description***
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

Field or Control	***Description***
Enable Attachments	Select to enable employees to add attachments to their bank accounts. For more information on attachments see “Understanding Attachments” (Application Fundamentals).
Attachments Required	Select to require employees to add an attachment when adding a new bank account.

Notifications

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

Field or Control	***Description***
Enable Notifications	Select to generate notifications based on user preferences. The notification could be a text, email or in-app notification based on user preference setting. The notifications are generated in the following scenarios: • Bank account is created • Bank account is deleted • Bank account details are updated • Added payment distribution for payroll payment

Field or Control	*Description*
Notify Employee	Select this checkbox if you want to send notifications to employees. Click the *Employee Notification Events* link to access the Notification Composer cross reference page where it will list the notification event ids that are mapped for employee based notifications. **Note:** This link is displayed only when Notification Composer feature is enabled in the system.
Notify Administrator	Select this checkbox if you want to send notifications to administrators. Click the *Admin Notification Events* link to access the Notification Composer cross reference page where it will list the notification event ids that are mapped for administrator based notifications. **Note:** This link is displayed only when Notification Composer feature is enabled in the system.
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

Field or Control	*Description*
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

Field or Control	*Description*
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.

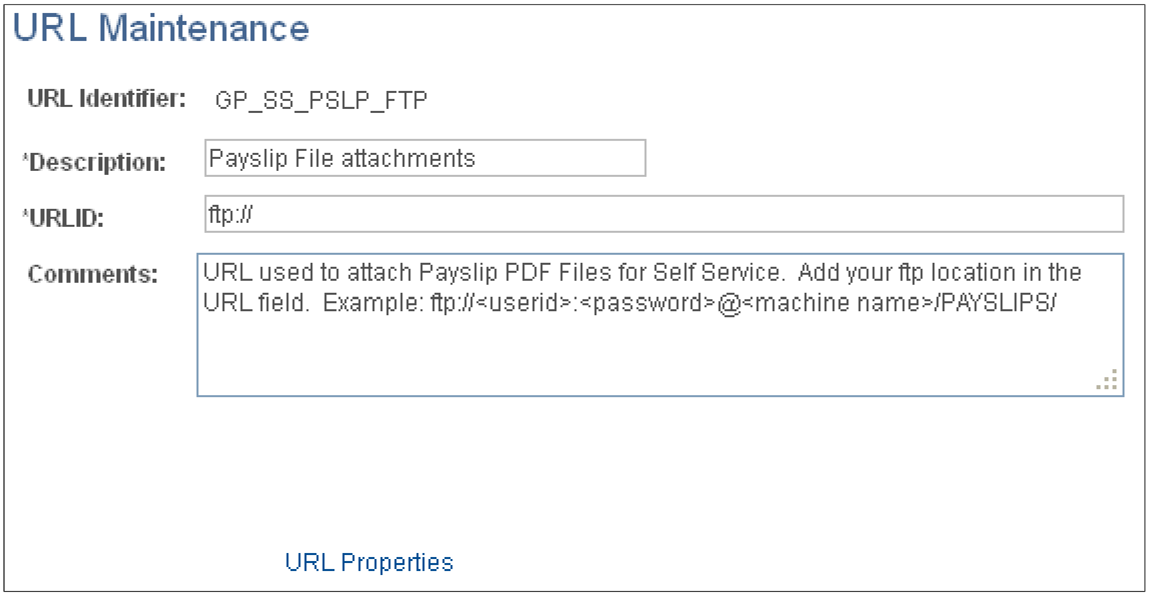
URL Maintenance Page

Use the URL Maintenance page (URL_TABLE) to store URL addresses.

Navigation:

PeopleTools > **Utilities** > **Administration** > **URLs** > **URL Maintenance**

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.

Field or Control	***Description***
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.

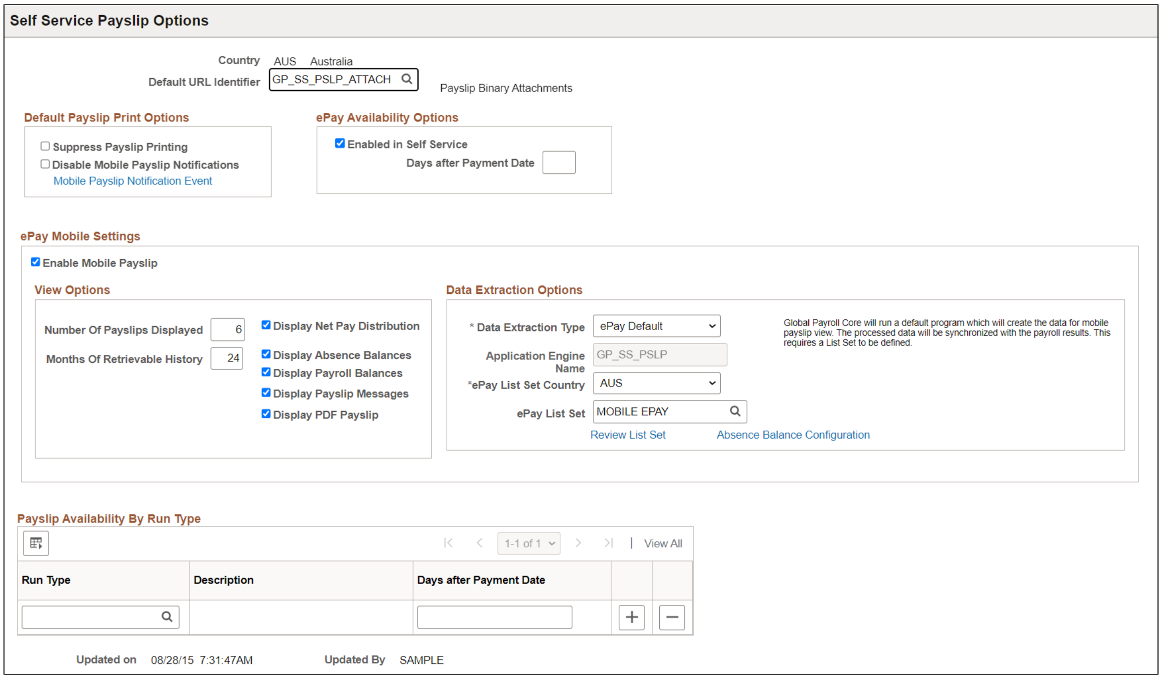
Self Service Payslip Options Page

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**

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



Field or Control	***Description***
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

Field or Control	***Description***
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.
Disable Mobile Payslip Alert	Select the checkbox to disable payslip notifications. This field is displayed only when Notification Composer feature is disabled in the system.

Field or Control	*Description*
Disable Mobile Payslip Notifications	Select the checkbox to disable payslip notifications, if Notification Composer is enabled. Employees will not receive notifications if Notification Composer is enabled and this checkbox is selected. **Note:** This field is displayed only when Notification Composer feature is enabled in the system.
Mobile Payslip Notification Event	Click this link to access the Notification Composer cross reference page where it will list the notification event ids that are mapped for employee based notifications. **Note:** This link is displayed only when Notification Composer feature is enabled in the system.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see "Understanding Notification Composer" (Enterprise Components).

ePay Availability Options

Field or Control	*Description*
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.

Field or Control	***Description***
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

Field or Control	***Description***
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

Field or Control	***Description***
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.

Field or Control	***Description***
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 Payslip Messages	Select to display **Payslip Messages** link on the Mobile Payslip. For details, see Payment Summary Page
Display PDF Payslip	Select to display the **View PDF Payslip** link on the Payment Summary Page.

Data Extraction Options

Field or Control	*Description*
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 run 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 Global Payroll) where you can review and update the list set you selected in the **ePay List Set** field.

Field or Control	Description
Absence Balance Configuration	Click to access the “Balances Page” (PeopleSoft Absence Management) where you can review and update the absence balance elements that the system displays for mobile payslips.

Payslip Availability By Run Type

Field or Control	Description
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.

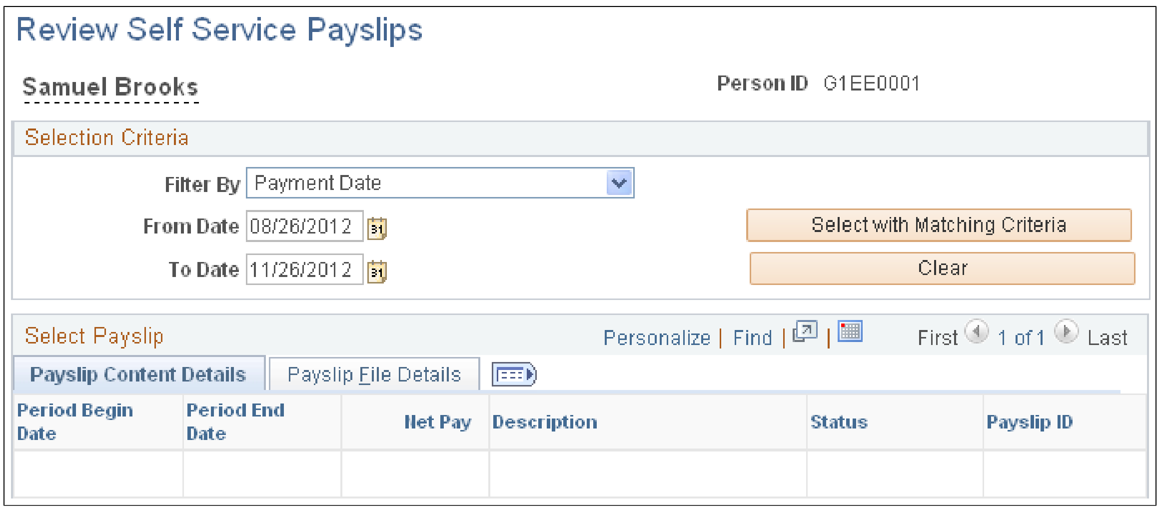
Reviewing Employee Payslips

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**

This example illustrates the fields and controls on the Review Self Service Payslips page.



Selection Criteria

Field or Control	***Description***
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.

Field or Control	*Description*
Clear	Select to clear the **From Date** and **To Date** fields along with any results listed in the **Select Payslip** group box.

Select Payslip

Field or Control	*Description*
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 Global Payroll for the United Kingdom)

"Viewing Payslips" (PeopleSoft 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:

Video: PeopleSoft HCM 9.2 Image 18 Highlights: Mobile Payslip for Multiple Countries

Video: 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 Homepages" (Application Fundamentals).

Pages Used 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.

Page/Tile Name	Definition Name	Usage
Payslip Messages Page	GP_MPSLP_MSG_FL	View the messages associated with a payslip.
Payslip Analytics Page	GP_MPSLP_CHRT	View how the ratios of the earnings and deductions associated with a payslip.

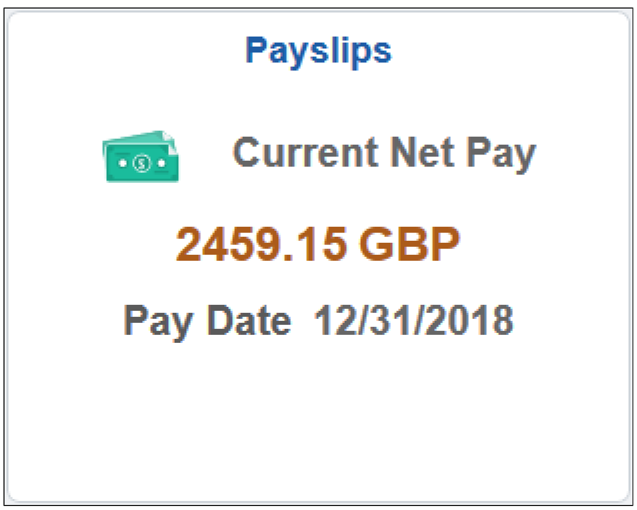
Payslips Tile

Employees use the Payslips tile to access their payslip information.

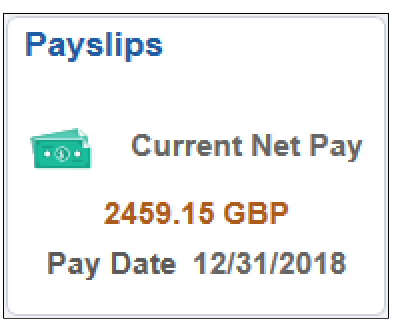
Navigation:

- The Payslips tile is delivered as part of the "Employee Self Service Homepage" (Application Fundamentals), but the location can change if you change the delivered homepages or if employees personalize their homepages.
- "Global Payroll Dashboard" (PeopleSoft Global Payroll)

This example illustrates the Payslips tile for the tablet.



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.

Field or Control	***Description***
Pay Date	Displays the payment date of the employee's most recent payslip in the user's preferred date format.

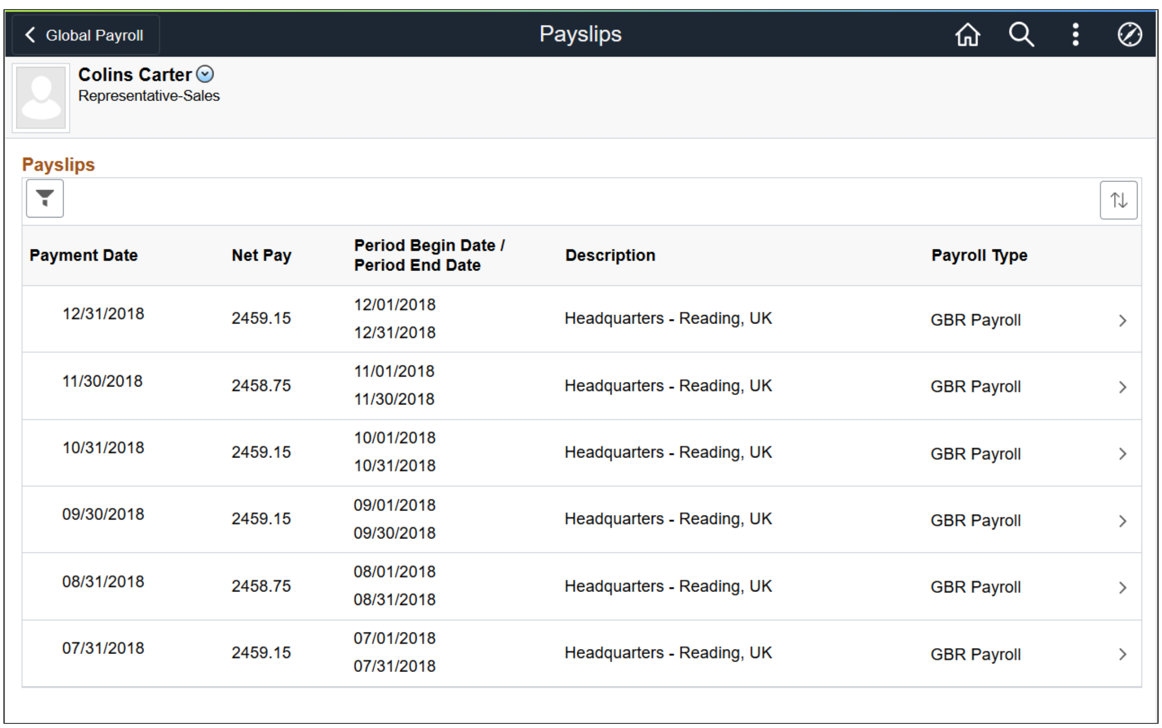
Payslips Page

Use the Payslips page (GP_SS_EE_PSLP_FLU) to view summary information about recent payslips.

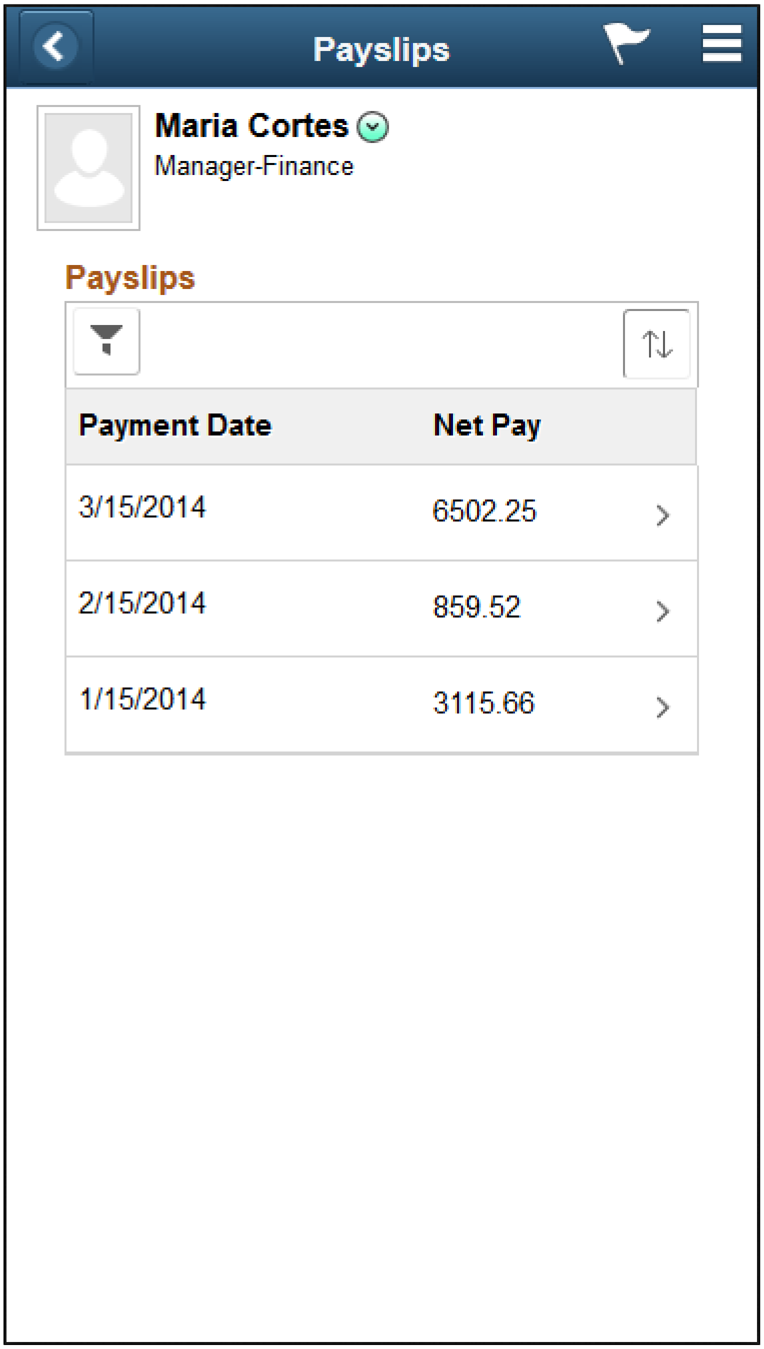
Navigation:

- Click the Payslips tile that is available on a fluid home page.
- Click the Payslips tile from the "Global Payroll Dashboard" (PeopleSoft Global Payroll).
- Click *Payslips* from the "Fluid Navigation Collection for Global Payroll" (PeopleSoft Global Payroll).
- (Navigator) **Self Service** > **Payroll and Compensation** > **Payslips**

This example illustrates the Payslips page for the tablet.



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" (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.

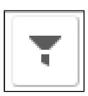
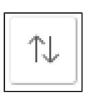
Dates appear in the user’s preferred format.

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

Field or Control	*Description*
	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.

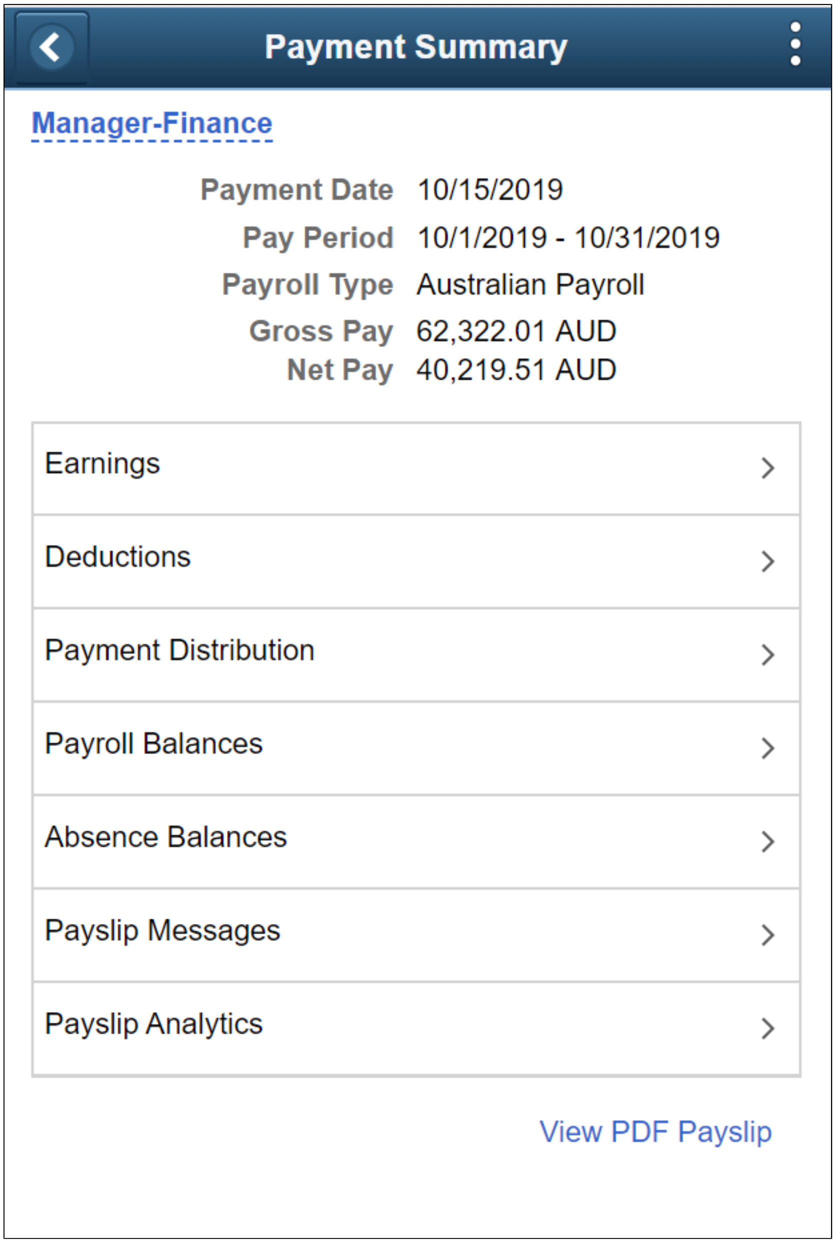
Payment Summary Page

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.

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

Field or Control	***Description***
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.
Payslip Messages	Click to access the Payslip Messages 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.

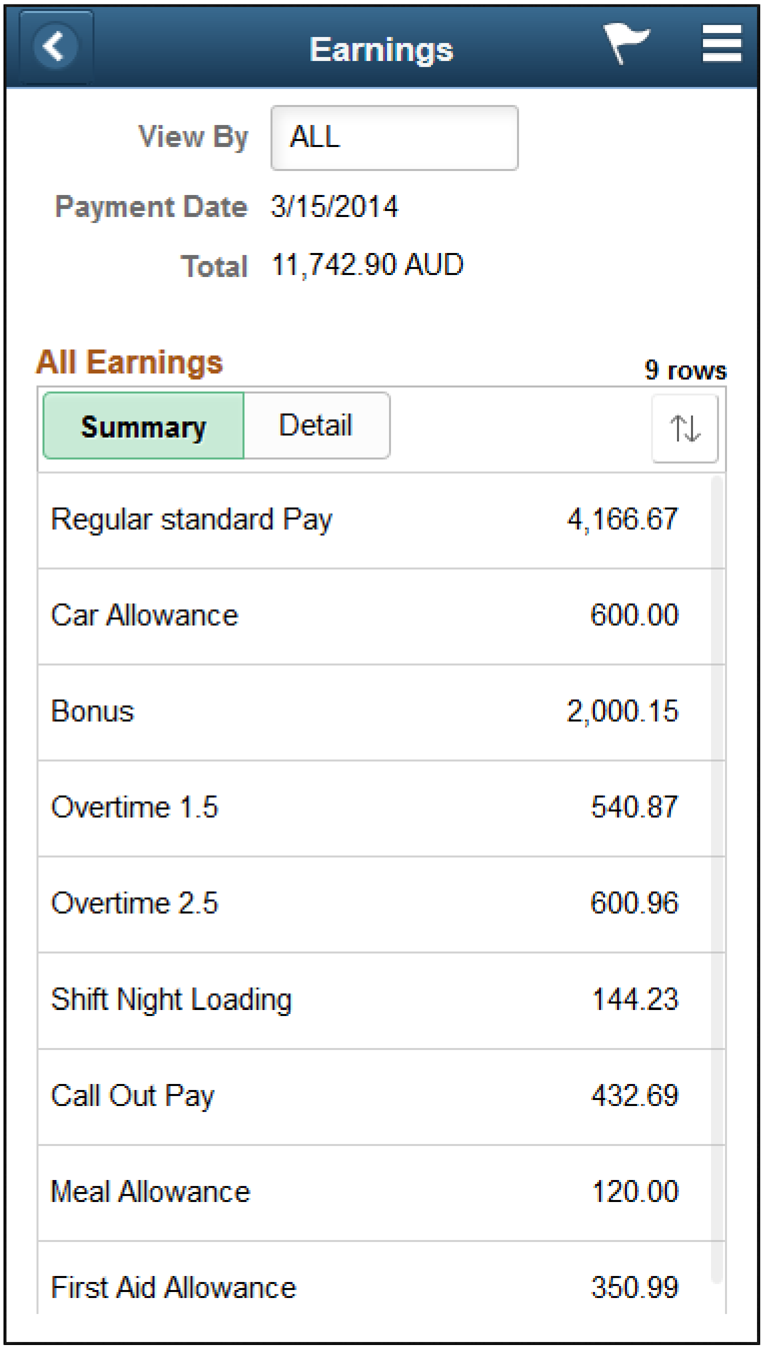
Earnings Page

Use the Earnings page (GP_MPSLP_ERNG) to view the earnings for a payslip.

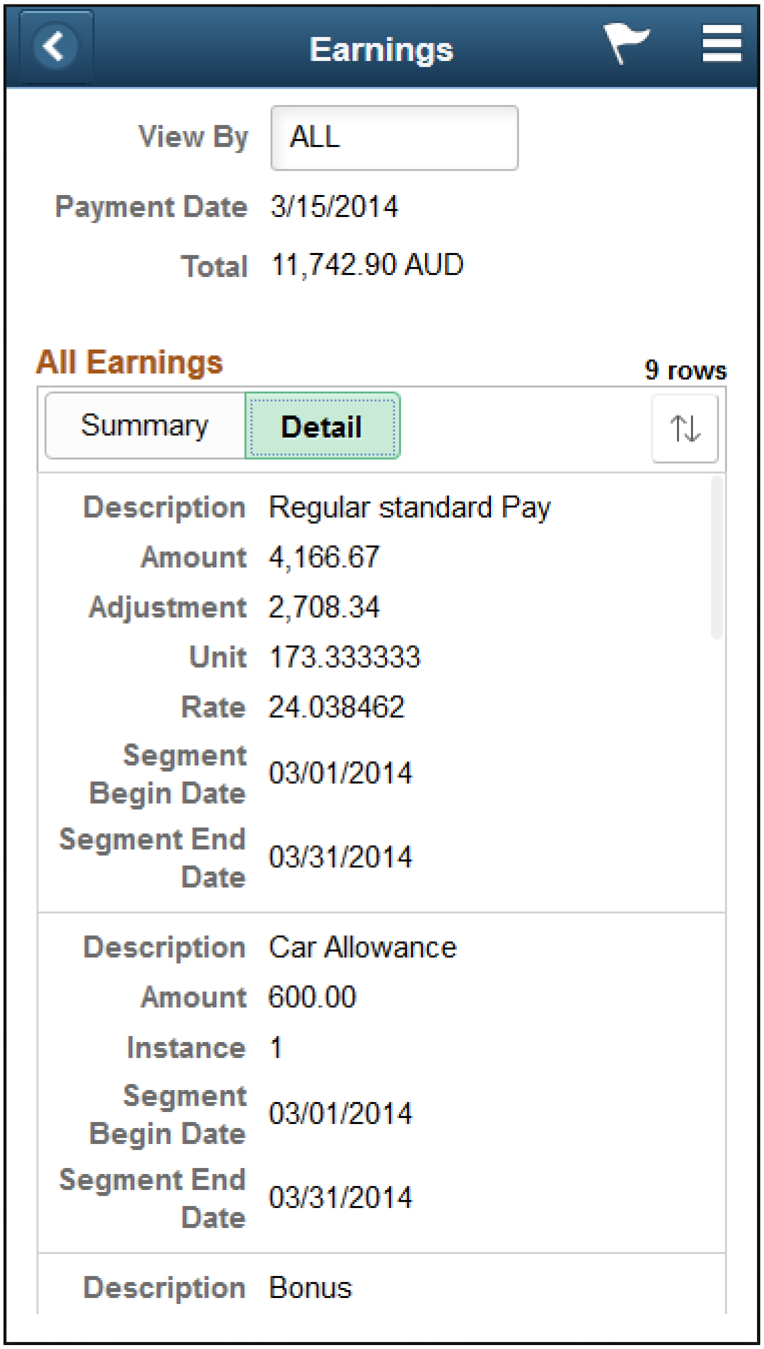
Navigation:

Click the Earnings item on the Payment Summary page.

This example illustrates the Earnings page: Summary tab for the smartphone.



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

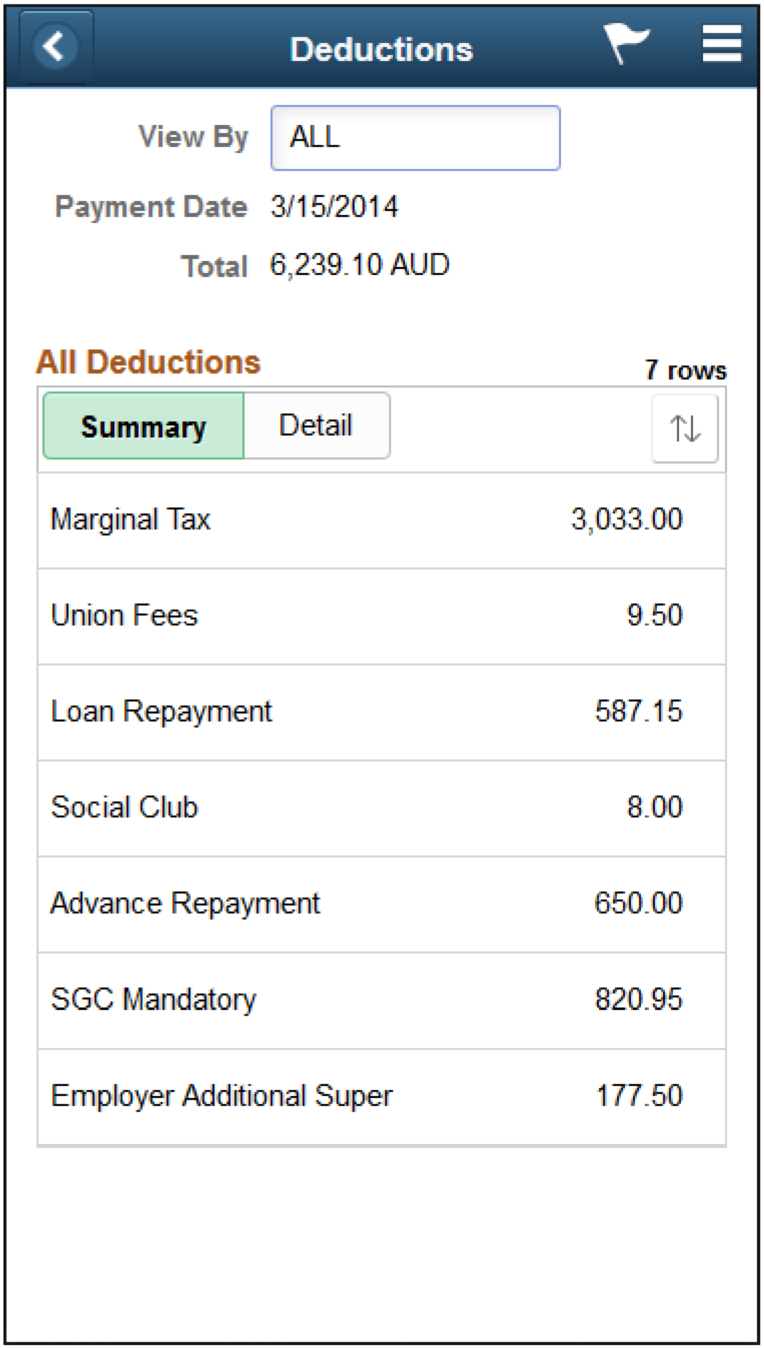
Deductions Page

Use the Deductions page (GP_MPSLP_DEDN) to view the deductions for a payslip.

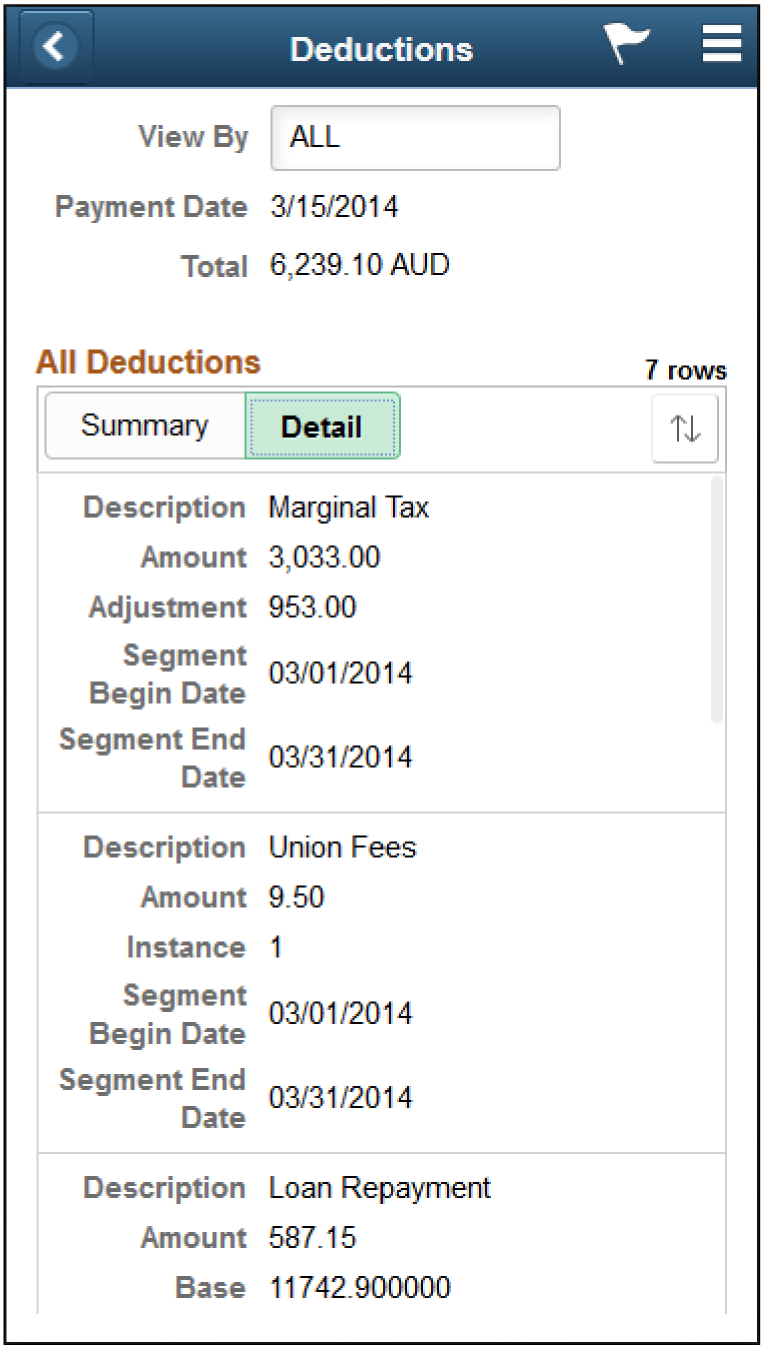
Navigation:

Click the Deductions item on the Payment Summary page.

This example illustrates the Deductions page: Summary tab for the smartphone.



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

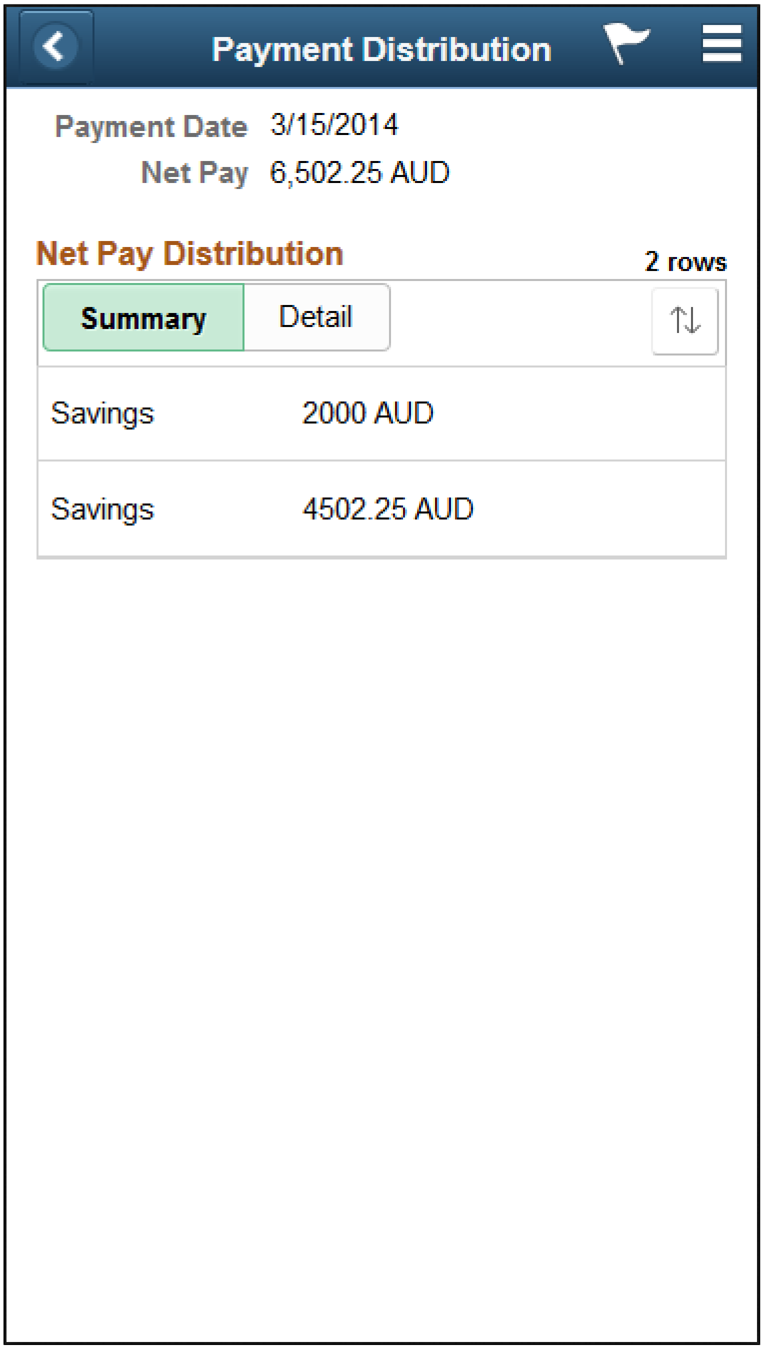
Payment Distribution Page

Use the Payment Distribution page (GP_MPSLP_PMT_DST) to view the net pay distribution for a payslip.

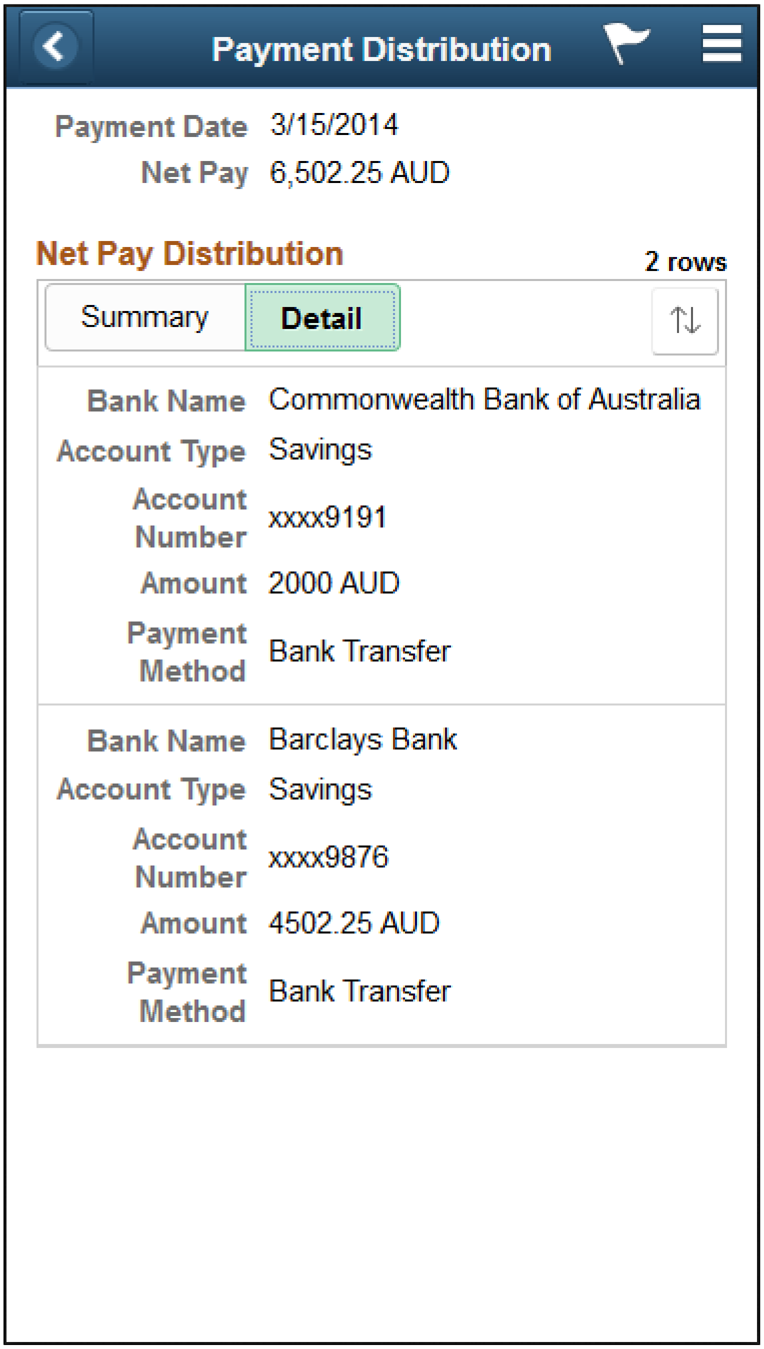
Navigation:

Click the Payment Distribution item on the Payment Summary page.

This example illustrates the Payment Distribution page: Summary tab for the smartphone.



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

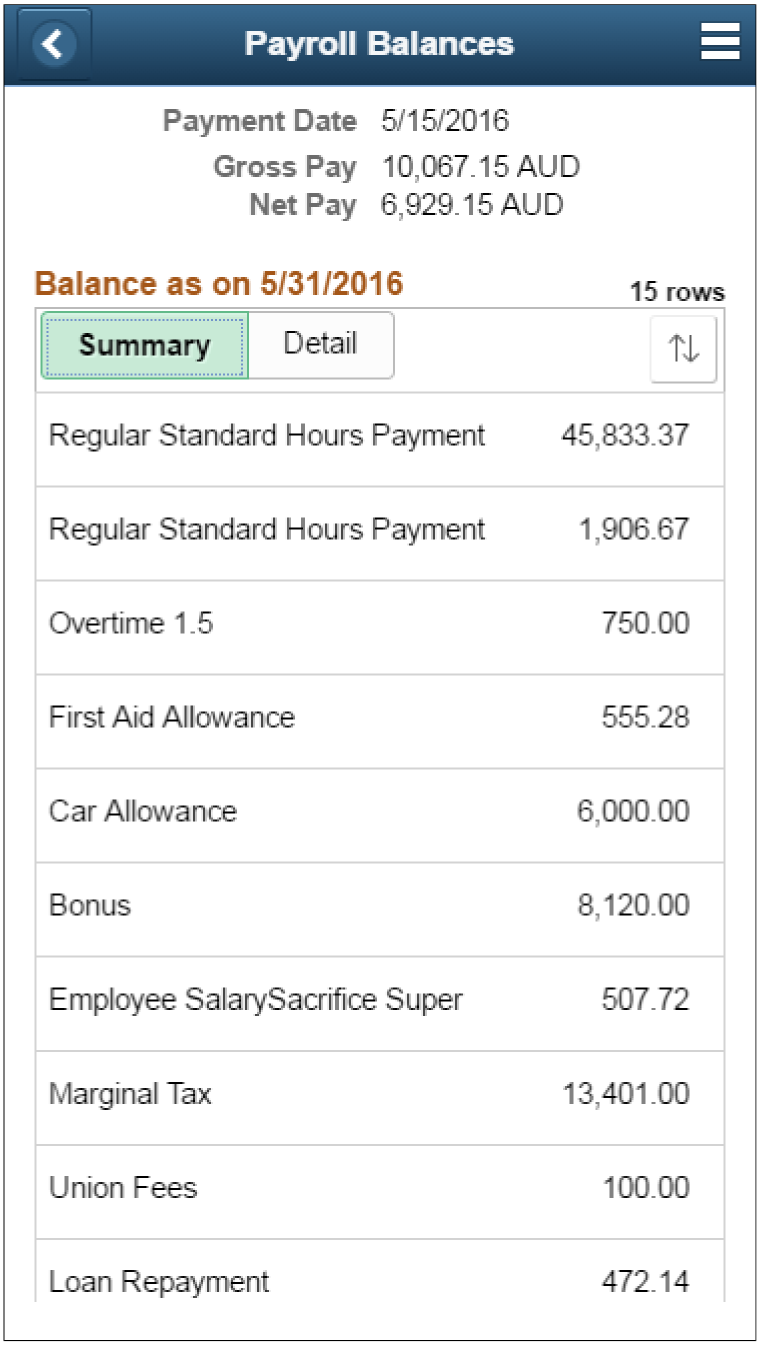
Payroll Balances Page

Use the Payroll Balances page (GP_MPSLP_PAYBAL) to view payroll balances for a payslip.

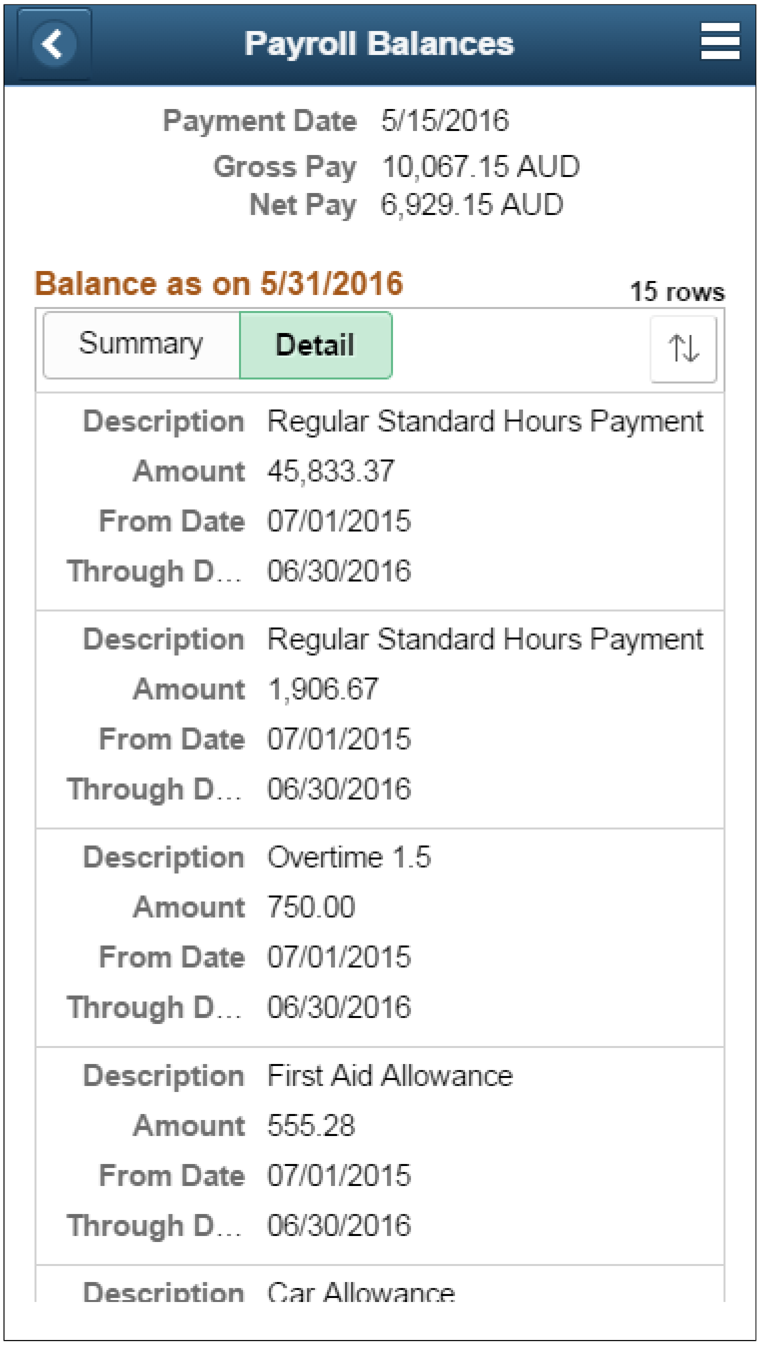
Navigation:

Click the Payroll Balances item on the Payment Summary page.

This example illustrates the Payroll Balances page: Summary tab for the smartphone.



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

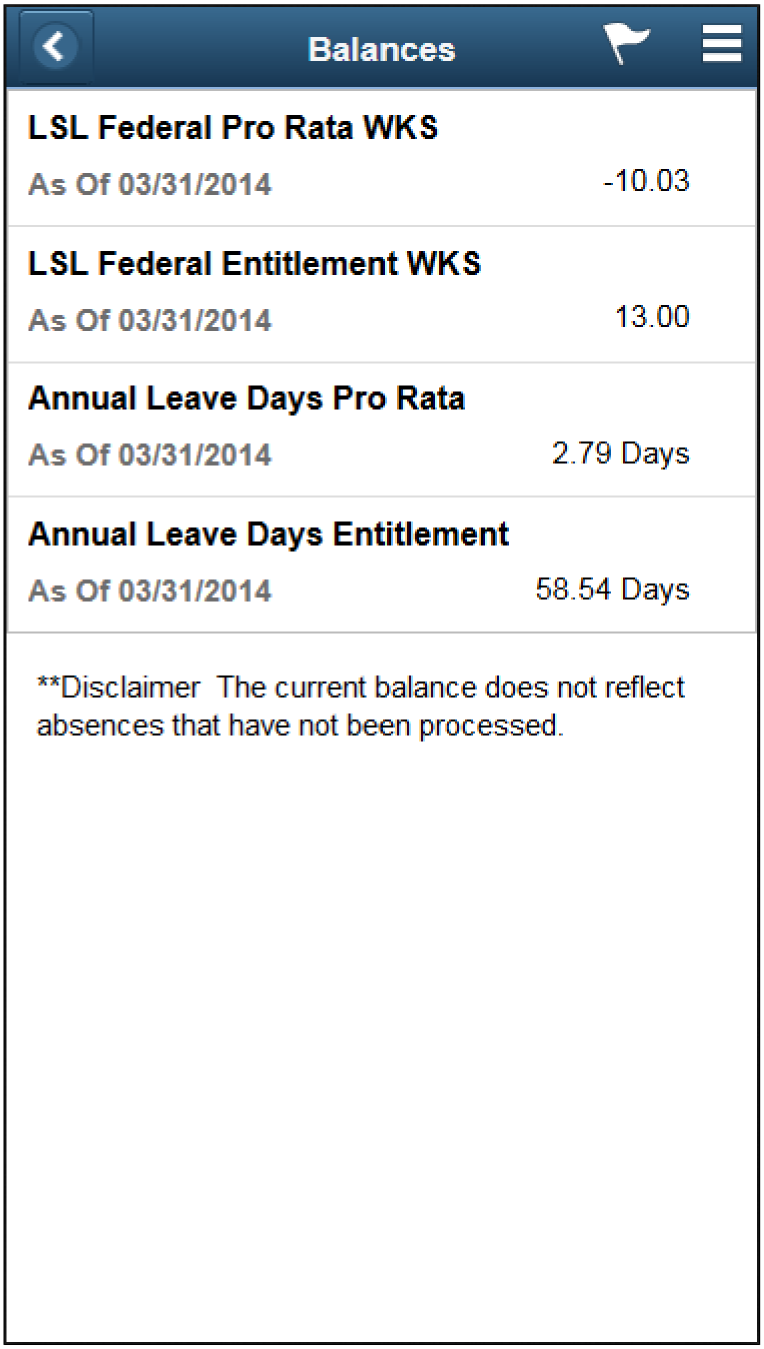
Balances Page

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.

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.

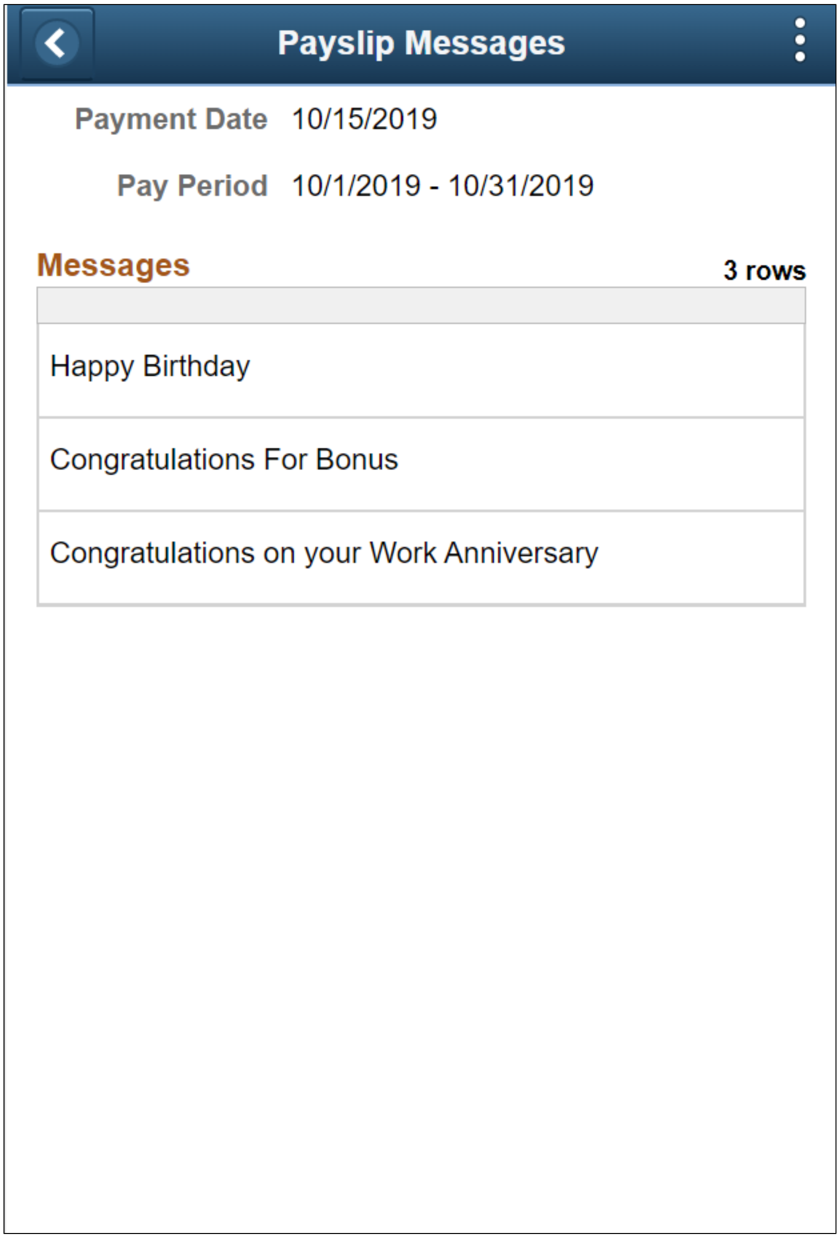
Payslip Messages Page

Use the Payslip Messages page (GP_MPSLP_MSG_FL) to view any messages associated with the payslip. Messages can be a combination of Country Extension or Customer messages and Core messages.

Navigation:

Click the Payslip Messages item on the Payment Summary page.

This example illustrates the Payslip Messages page for the smartphone.



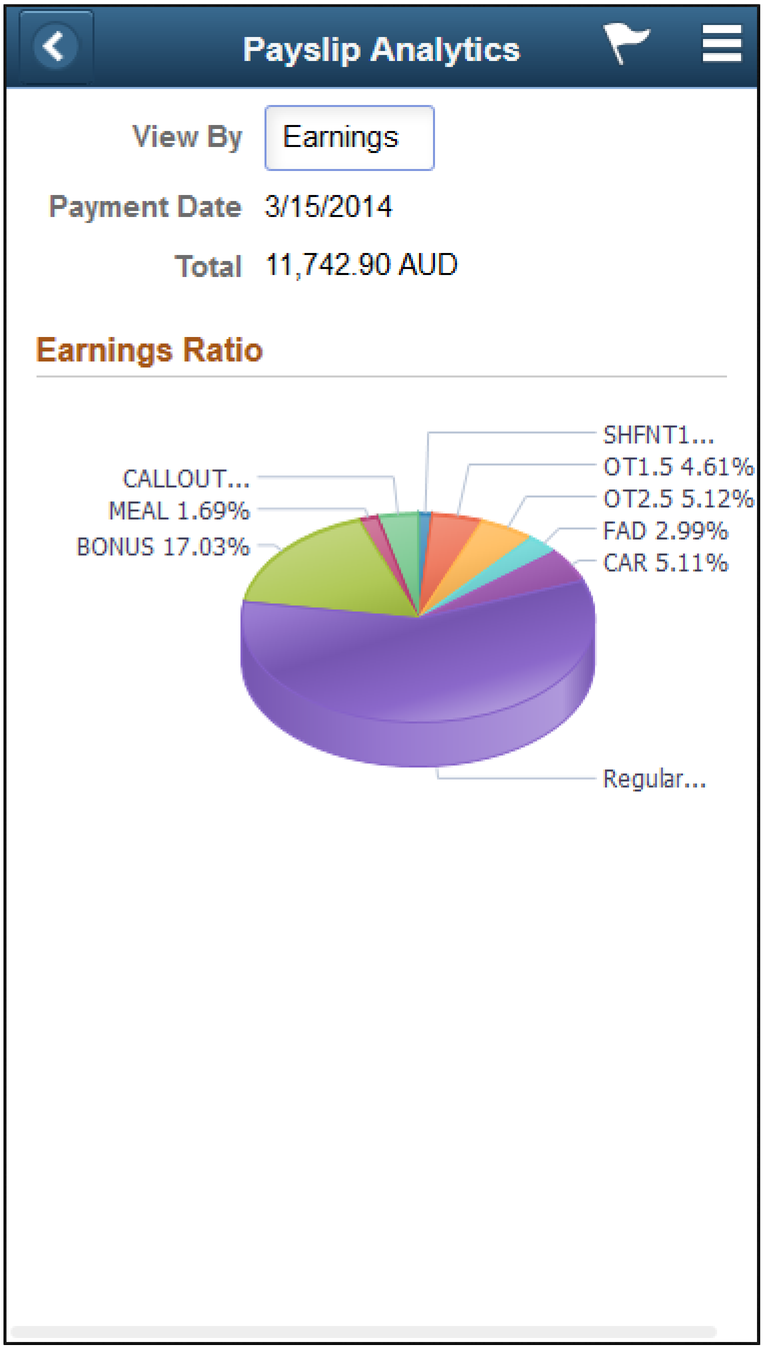
Payslip Analytics Page

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.

This example illustrates the Payslip Analytics page for the smartphone.



Field or Control	Description
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.

Field or Control	***Description***
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.

Video: Image Highlights, PeopleSoft HCM Update Image 22: Fluid Self Service for ePay Global Payroll Banking

Related Links

"Defining Payee Net Pay Elections" (PeopleSoft 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.

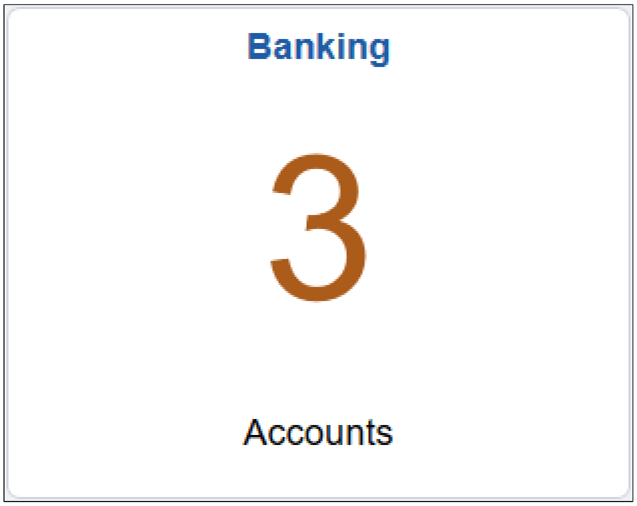
Banking Tile

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 Homepage" (Application Fundamentals), but the location can change if you change the delivered home pages or if employees personalize their home pages.
- "Global Payroll Dashboard" (PeopleSoft Global Payroll)

This example illustrates the Banking tile.



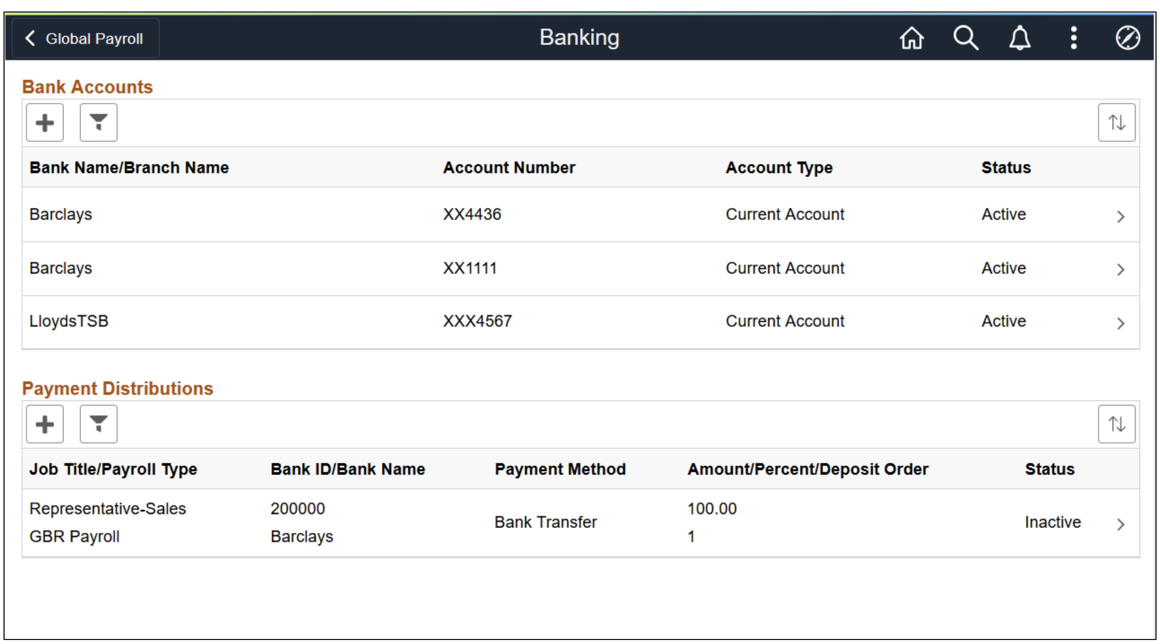
Banking Page

Use the Banking page (GPSC_BANK_ADD_FL) to review your bank account and payment distribution information.

Navigation:

- Click the Banking tile that is available on a fluid home page.
- Click the Banking tile from the “Global Payroll Dashboard” (PeopleSoft Global Payroll).
- Click *Banking* from the “Fluid Navigation Collection for Global Payroll” (PeopleSoft Global Payroll).

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.

Field or Control	***Description***
(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.

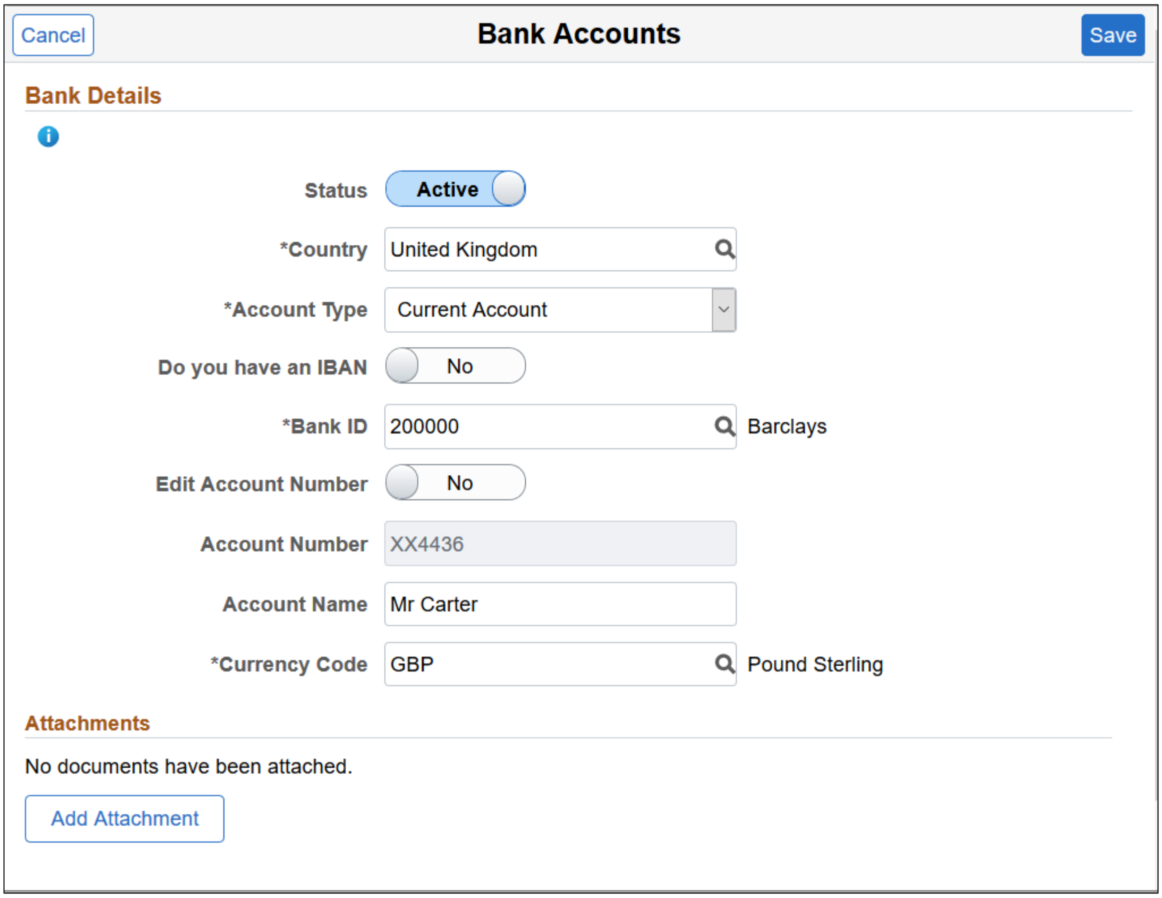
Bank Accounts Page

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.

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.

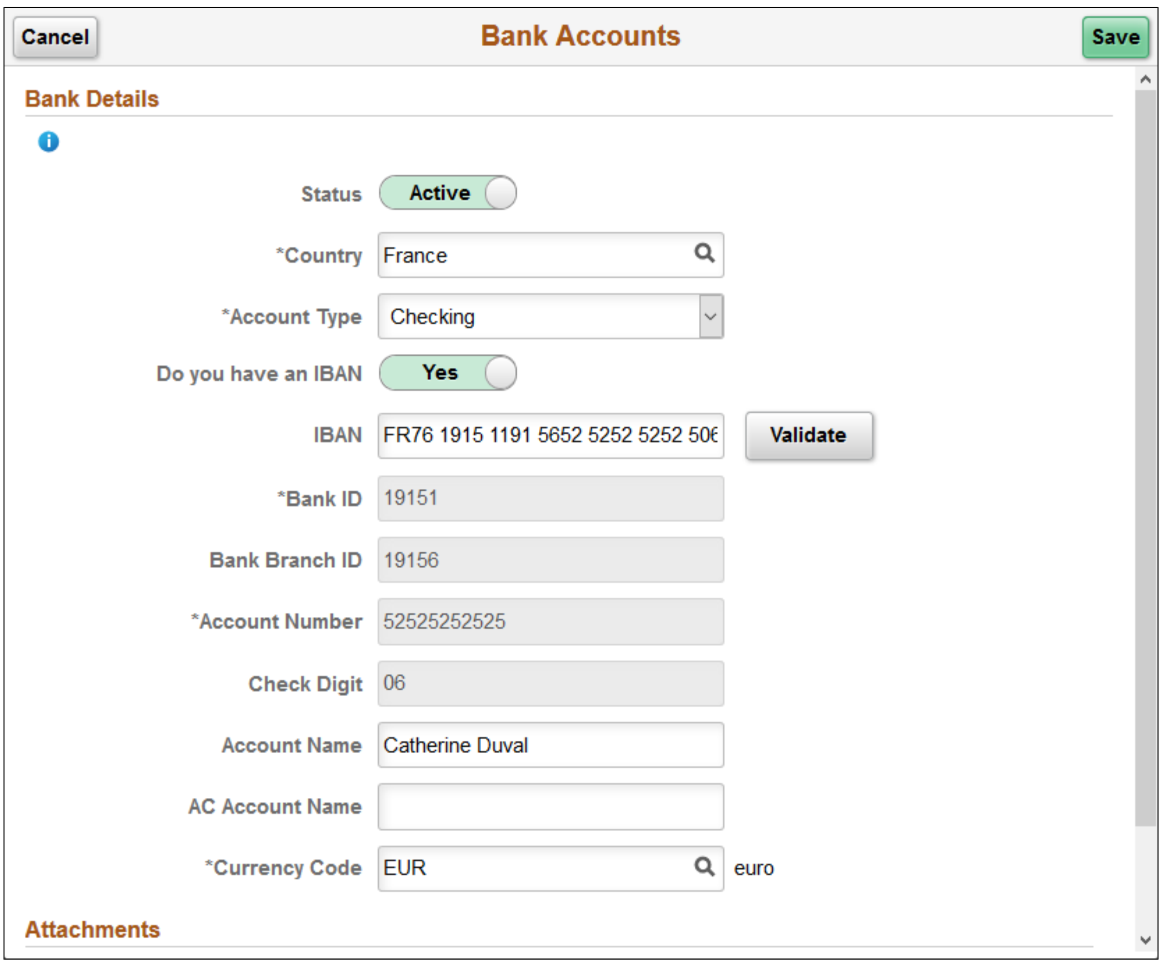
Bank Details

Field or Control	***Description***
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.

Field or Control	***Description***
Do you have an IBAN	Switch to *Yes* to indicate that the payee has an (International Bank Account Number) IBAN. When you select *Yes*, the **IBAN** field and **Validate** button become available, whereas the **Bank ID**, **Account Number**, and **Check Digit** fields become display-only. When you enter the IBAN number and click the Validate button, the system populates the display-only fields after the validation is completed successfully. 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.
Bank ID	Enter the ID of the bank associated with the account.
Edit Account Number	Select *Yes* if you want to update the account number. This field appears when you view an existing bank account. The system clears the existing account number for you to enter a new number.
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.

Field or Control	***Description***
Building 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.

This is an example of the Bank Accounts page for an employee with an IBAN.



Field or Control	***Description***
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

Field or Control	***Description***
Add Attachment	Click to add an attachment to your bank account. You can upload files of any supported file extension for bank account attachments. **Note:** Administrators can update the file extension list if necessary. To do so, navigate to **PeopleTools** > **Utilities** > **Administration** > **Administer File Processing** > **File Extension List**. Modify the GP_ EPAY_BANK_FILE_EXTN_LST list, which is used for bank account attachments. For more information about the File Extension List page, refer to the *Using Administration Utilities* topic in *PeopleTools: System and Server Administration*, “Using PeopleTools Utilities”.

Related Links

“Maintain Bank Accounts Page” (PeopleSoft Human Resources Administer Workforce)

Payment Distribution Page

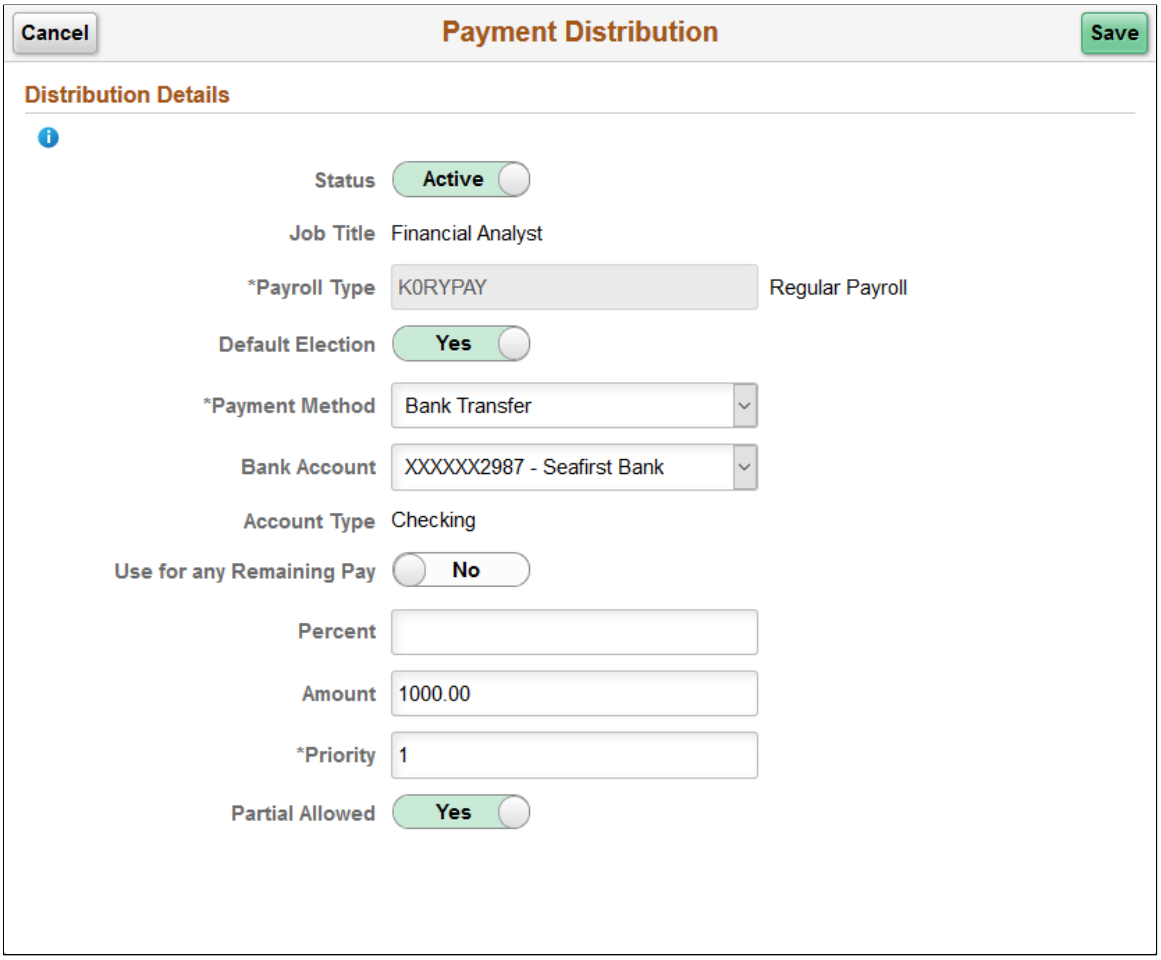
Use the Banking page (GPSC_NET_DIST_FL) to edit or add a payment distribution.

Navigation:

Click a payment distribution on the Banking page.

Click the Add button on the Banking page to add a new payment distribution.

This example illustrates the fields and controls on the Payment Distribution page.



Field or Control	***Description***
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.

Field or Control	Description
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 Global Payroll)

Chapter 6

(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:

Term	***Definition***
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.

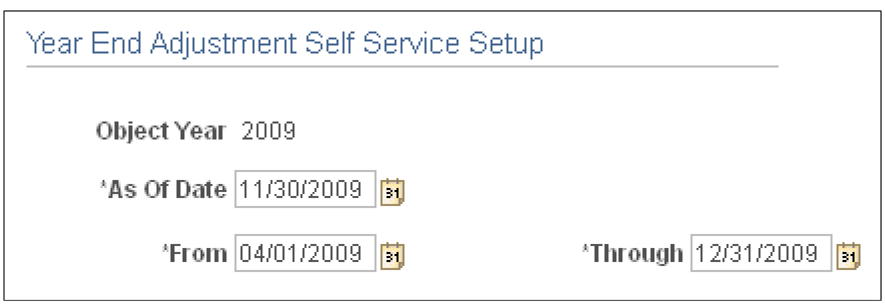
Year End Adjustment Self Service Setup Page

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**

This example illustrates the fields and controls on the Year End Adjustment Self Service Setup page.



Field or Control	***Description***
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.

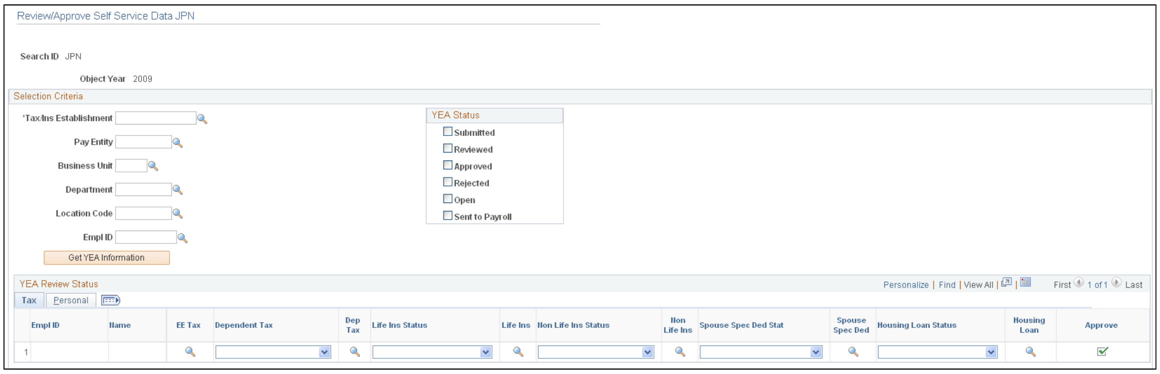
Review/Approve Self Service Data JPN Page

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

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.

Field or Control	*Description*
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.*"

Field or Control	Description
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

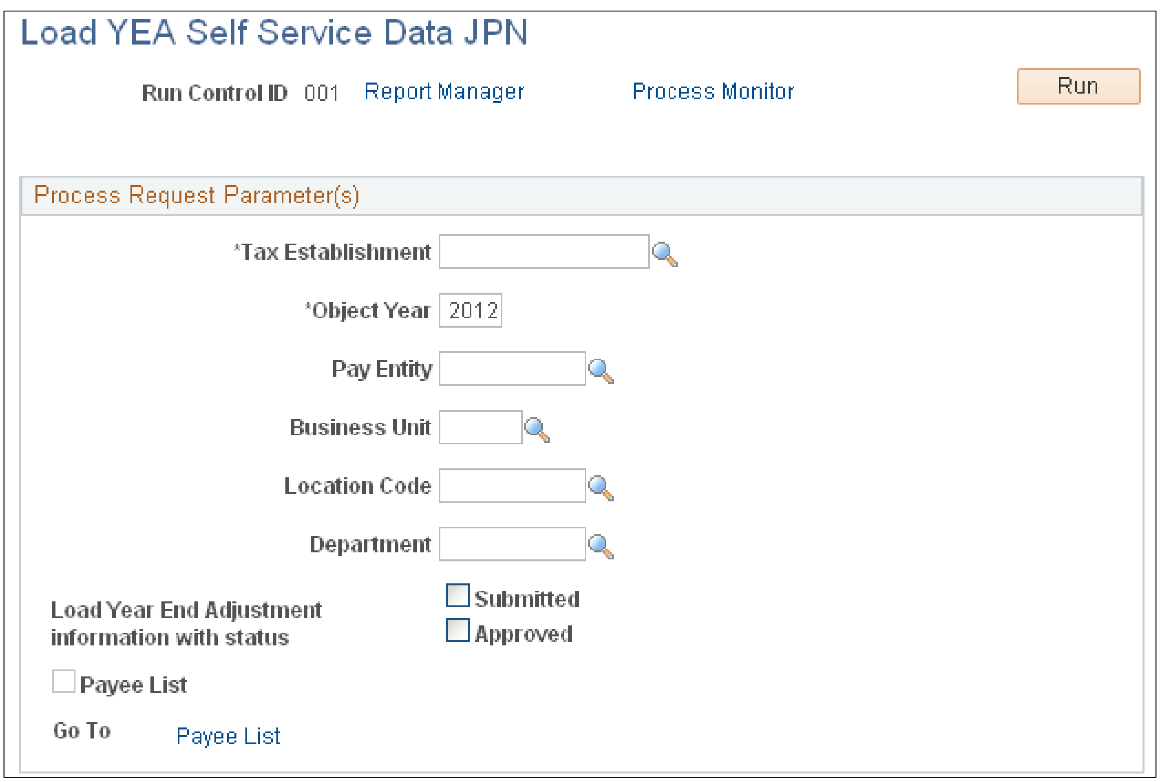
Load YEA Self Service Data JPN Page

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**

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.

Field or Control	***Description***
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 Global Payroll for Japan)

Chapter 7

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.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see "Understanding Notification Composer" (Enterprise Components).

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.*
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

Information Type	Description
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

Information Type	Description
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
Workflow Action	Manual
Role	Payroll administrator
Email Template	Send E-mail to employee; text type Correction 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/T4A Notification (CAN) Send RL-1/RL-2 Notification
Business Event	Notify Employee