

# Oracle Fusion Cloud Human Resources

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## **Using Global Payroll for Employees**

FA Latest



Oracle Fusion Cloud Human Resources  
Using Global Payroll for Employees

FA Latest

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# Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

## Get Help in the Applications

Some application pages have help icons  to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

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## Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

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Thanks for helping us improve our user assistance!

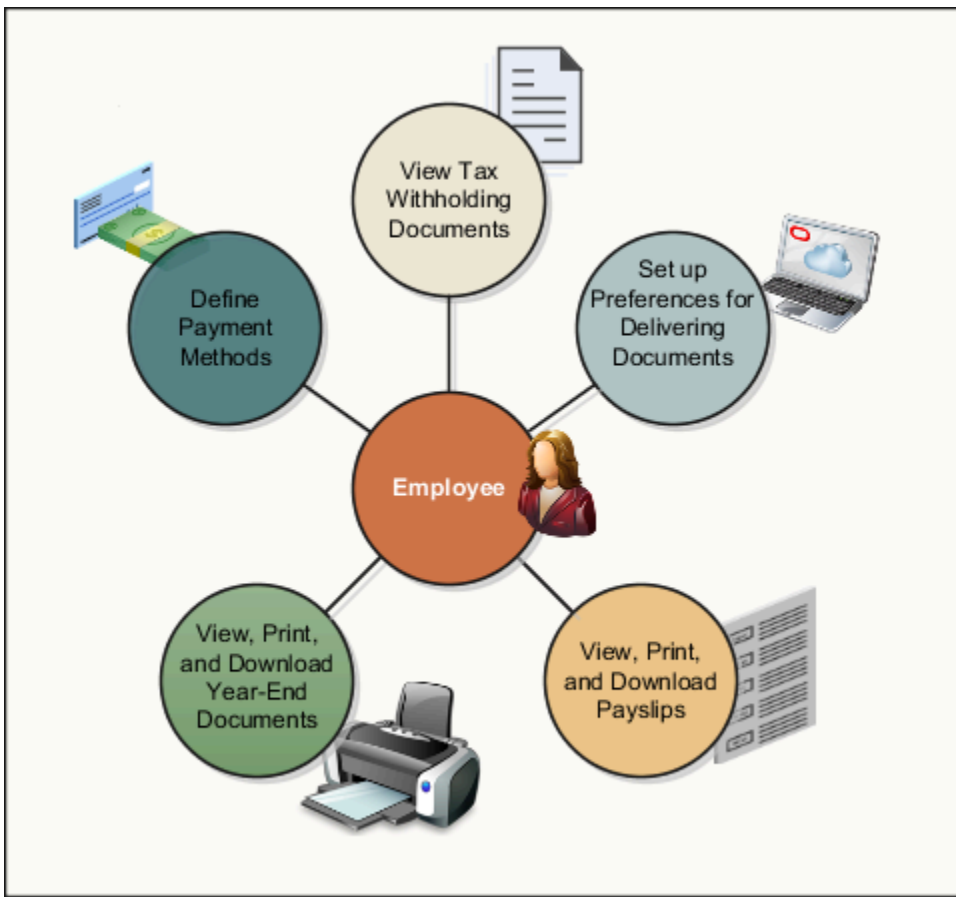


# 1 Overview

## Using Global Payroll

You can manage your payroll information, which, depending on access, may include viewing payslips, defining payment methods, and setting up document delivery preferences, from the payroll work area on your Home page.

This graphic shows you the different tasks that you can do in the application:



## Payslips

A payslip provides a record of the individual payroll payments you have received, including pay amounts, deductions taken, and accruals.

Use the **My Payslips** task to view the summary of a payslip, such as the earnings and deductions. You can also preview the full payslip document, held in document of records, embedded on the page.

## Payment Methods

Payment methods define how you want to be paid your payroll payments. If you want to be paid by direct deposit, you must create your bank accounts before creating your payment methods.

Use the redesigned **Payment Methods** task in your **Pay** work area to create bank accounts and define payment method details.

The payment method overview displays in a card layout. Each card contains a summary of the payment method info, such as payment method name, payment amount, and bank details if applicable. You can drill down into the payment method details, such as bank information, when applicable.

You can do the following on the Payment Methods page:

- Create a payment method and associated bank account in the same transaction.
- View and update bank accounts, such as to inactivate bank accounts that are no longer in use.
- Reorder payment methods to change the order of processing when they start and end on the same date.
- Create exception payment methods to have certain earnings paid to a different bank account is available by extending the functionality of this page.
- Enforce double entry of bank account information to verify the details are correct and prevent keying errors is available by extending the functionality of this page.

You need to create **bank accounts** and associate them to payment methods to be paid with direct deposit. Or, if your company allows, by international transfer. However, if you want to be paid by check, you can skip this and go directly to set up your payment methods.

Here are some important things to know about managing your bank accounts:

- When you create a bank account, it's automatically created with an active status.
- When you create a bank account for an international payment, you must select a country to continue.
- When you make a bank account inactive because you have closed it or no longer want to receive payments there, you can make it inactive. This action is effective tomorrow, which means your bank account will remain active until the end of today, the day you make it inactive.
- Once you have received a payment into your bank account, the only action you can take is to make it inactive.
- Be sure to create and edit your payment methods to match your bank accounts updates. For example, if you make a bank account inactive, update the payment method to associate it to an active bank account.

You need to create **payment methods** and associate to your bank accounts to be paid with direct deposit. Here are some other important things to know about payment methods:

- When you create your payment methods, uniquely name them to describe the type or reason for the payment method. For example, Pay Myself First Savings Account or Direct Deposit to Checking Account.
- If your company allows, you can split your payroll payment across multiple payment methods.
- When you create your first payment method, it will automatically default to receive 100% of your earnings. However, when you create more than one payment method, you can allocate a percentage of payment or an amount per payment method.

This table explains the data items to enter when you create your payment methods:



Option	What To Do
What do you want to call this payment method?	Enter a name to describe this payment method.
Payment Type	Select one of the payment types supported by your company. Such as direct deposit, check, cash, or international transfer.
Payment Amount	Select <b>Amount</b> or <b>Percentage</b> to specify how you want to allocate your funds.
Bank Account Details	Select the bank account to be associated for this payment method.

## Payment Method Processing Order

Reorder your payment methods to define them to be processed in a certain order. When you define multiple payment methods with the same effective date, you can use the reorder button to change the processing order of the payment method. For example, if you have a payment method set up that total less than your net payroll, the priority order of processing may be important.

**Note:** The reorder button is enabled only when you have more than one payment method defined effective the same day.

## Exception Payment Methods

Define exception payment method to deposit payments into different bank account based on type of payment. For example, if you want your regular salary to be paid to your checking account but your bonus payment to be paid to your savings account, define an exception for your bonus. Be sure to define your regular bank account and payment method before you define an exception to it.

**Note:** If your company supports exceptions, this option is at the bottom of the payment method page.

## Payroll Relationship Switcher

Payroll relationship switcher on the payment methods page lets you to move from one payment method details to another when you have multiple payroll relationships. This only appears if you have multiple payroll relationships. For example, if you're going through a global transfer, you may have multiple payroll relationships. Because payment methods are created at the payroll relationship level, use the payroll relationship switcher at the top of the payment method page to navigate from one to another.

## Prenote Process

The prenote process, also referred to as a prenotification, is a process your company uses to verify your bank account details before sending you a payment. If you work for a company that runs the prenote process, which are typically companies in the US, you may see a prenotification status banner message at the top of the bank account region.

This table explains the prenotification status banners you may see:

Prenotification Banner Message	Banner Shows on Page
This bank account will be used once the prenote process is complete.	From the time the bank account is first created and attached to a payment method until the prenote process is complete.
This bank account was rejected during the prenote process and won't be used.	When the bank account has been marked as rejected.

## Year-End Documents

A year-end document provides you with a record of your earning and deductions for a given fiscal year.

Use the Year-End Documents task to view your year-end documents. You see a list of recent year-end documents, use the drop-down list to view older payslips.

## Document Delivery Preferences

On the Payroll page, click **Document Delivery Preferences** to define preferences for delivering your documents, such as payslips or year-end tax statement.

On the Document Delivery Preferences page, you can select the default delivery methods, such as online and paper, for your documents.

To view your year-end document,s click the hyperlink. Once open, you can save or print for your records.

To view your forms online, configure these settings:

- In the **Delivery Method** field, select **Online**.
- In the **Online Delivery Consent** field, select **Granted**.

## View My Payslip and Bank Details



Watch video

You can view your payslip and bank details on the Payroll page from your home page. You can also set up your bank details.

To view the PDF of a full payslip:

1. Click **Me** on your home page.
2. Click **Pay** to open the Payroll page.
3. Click **My Payslips** to access and view your payslips.

At any given time you can view 25 payslips listed by date order. Payslips with the latest available date are displayed at the top of the page.

- Select a payslip to view the details.
- Select multiple payslips and view details of the payslip you selected last.
- Select a payslip and view within the Summary region of the payslip page the following tabs:

- Earnings
  - Deductions
  - Net Pay Distribution
  - Payroll Preview
- Click on the **Earnings** tab to view a summary of the amounts paid on the payslip.
  - Click on the **Deductions** tab to view a summary of the amounts deducted on the payslip.

These two tabs also include an analytics region that break down the payslip amounts in a pie chart and provide a bar chart to compare payslips.

**Note:** A pie-chart can't display negative values such as a salary or absence deduction. Therefore, the information displayed on the pie chart may not match the earnings and deductions listed in the earnings and deduction regions.

- By default, the bar chart displays history details for four payslips. You can use the chart to compare the details across the payslips.
- Select the **Net Pay Distribution** tab to view the net pay distribution information such as the bank account details.
- Select the **Payroll Preview** tab to view the payslip, held in the Document of Records, and embedded within the Payslips page. You can also download the document from this page.
- Select the check boxes against the payslips and use the Export option at the top of the page to export one or more payslip documents.

You can print your payslip or save it to your computer. Your payslips are stored in the application and you can retrieve them at any time.

## Set Up Personal Payment Method Example for Direct Deposit

Personal payment methods define how you want to receive your payments, such as by check or direct deposit. Follow these steps to create a direct deposit personal payment method. You must create your bank accounts before you can associate payment methods. Create your bank accounts for the majority of your payment paid to your checking account and for a small percentage paid to your savings account.

Create your checking account:

1. Choose the **Payment Methods** task in your Pay area.
2. In the **Bank Accounts** section, click Add.
3. Enter your checking bank account details.
4. Click **Save**.

Create your savings account:

1. In the **Bank Accounts** section on the Payment Methods page, click Add.
2. Enter your savings bank account details.
3. Click **Save**.

Create your personal payment method to be paid to your checking account

1. In the **My Payment Methods** section, on the Payment Methods page, click Add.

2. Enter a name for your payment method, such as 'My Checking Account'.
3. In the **Payment Type** field, select **Direct Deposit**.
4. Select your **Checking** account from the bank account list of values.
5. Click **Save**.

Create your personal payment method to be paid to your checking account:

1. In the **My Payment Methods** section, on the Payment Methods page, click Add.
2. Enter a name for your payment method, such as **My Savings Account**.
3. In the **Payment Type** field, select **Direct Deposit**.
4. In the **Payment Amount** field, select percentage and enter a value, such as 10 for 10%.
5. Select your **Savings** account from the bank account list of values.
6. Click **Save**.

## View My Year-End Documents

Use the redesigned Year-End Documents page to quickly access and view your year-end documents.

You can view the documents for a specific date range and for all of your payroll relationships.

Navigate to **Me > Quick Actions > Year-End Documents** to open the page. You can also use a deep link to access the page.

The redesigned page offers you the following:

- View by default, year-end documents for the last three years.
- Enter a **From Date** and **To Date**, to view year-end documents for a specific date range.
- If you have multiple payroll relationships, documents pertaining to all of your payroll relationships are displayed on the page.
- Use the **Open PDF** option to view the PDF version of a document.
- When you search for documents over a span of years, a separate tile is displayed on the page for each year. The year-specific tiles are differentiated by distinct colors or pictures to allow easy access of documents for each specific year.
- Use the **Preview Year-End** option to preview a document without downloading it to your local drive. Use the **ORA\_PAY\_ENABLE\_PREVIEW\_MODE** profile option to enable preview of the year-end PDF documents without downloading the document.

## 2 United States

### View and Update Pay Info for the US

Use the pages in **Pay** to view and update your pay info.

From your **Me** page, click **Pay** to view these pages.

- Document Delivery Preferences
- Payslips
- Payment Methods
- Year-End Documents
- Tax Withholding

#### Document Delivery Preferences

**Document Delivery Preferences** enables you to access and edit your document delivery preferences. Use this page to access and edit your document delivery preferences.

On this page, from the list of document types, select a document type to set its preferences. Your employer has set which document types you're allowed to view. The following are the common document types.

- W\_2
- W\_2c
- Payslip
- 1095-C

If you think any are missing, contact your administrator.

#### Payslips

**My Payslips** enables you to access your payslips. You can also use **Details** to set how many payslips you want to view.

#### Payment Methods

**Payment Methods** enables you to access and edit your payment method details.

#### Year-End Documents

**Year-End Documents** enables you to access your year-end documents, such as Forms W-2 and 1095-C. You can also use **Details** to set how many documents you want to view.

#### Tax Withholding

From this page, you can:

- Access and edit your tax withholding info

- Print the PDF version of your tax form by clicking the federal or state name link

When you click one of these links, the appropriate PDF file generates and you can print it as needed.

## Choose Delivery Options for Your Payslip and Year-End Documents

You can set your own document print preferences using the Document Delivery action.

1. Select **Me** at the top of your home page.
2. Scroll down to **Document Delivery Preferences**, and select the edit (pencil) icon for the item you want to update.
3. Make your choices as needed.

This type	Is used for this
W_2	Employee Forms W-2, W-2GU, and W-2PR
W_2c	Employee Forms W-2c, W-2cGU, and W-2cPR
Payslip	Shows the detail for payroll payments received
1095-C	Shows the details for ACA Form 1095-C

If you select the **Online** delivery method, and grant online delivery consent, you can view your forms online. If you don't grant consent, the forms are generated and stored in Document Records, but you won't be able to view them.

Online documents are easy to access and help reduce waste and the cost of printing.

### Related Topics

- [How can I get my W-2?](#)

## How can I get my W-4?

To view a copy of your Form W-4, open your Me page and click Pay and then Tax Withholding. If you don't have access to the Tax Withholding page, contact your administrator.

To edit the existing federal and state entries, click the pencil icon. Enter the start date of the change, and then enter your applicable changes. Once complete, select **I Agree** and then click **Save**.

From this page, you can also view or hide prior tax withholding information and download a PDF of your W-4.

#### Related Topics

- [View and Update Pay Information for the US](#)

## How do I update my W-4?

By default, your Form W-4 is set to Single or Married filing separately.

If your employer allows manual updates to your W-4, you can change your settings by selecting **Me** and then **Pay**. Select **Tax Withholding**, and then select either the state or federal form. Either click the edit icon and make your changes, or click **Add** to update withholding details and save.

Select **View Prior Tax Withholding** to view or hide prior tax withholding information. You can also download a PDF of your W-4 information.

If you don't have access to this task, contact your administrator.

#### Related Topics

- [Tax Withholding Card](#)

## What happens if my state Form W-4 copies the federal W-4?

An employee can perform their own updates on on Form W-4 for both federal and state withholding. This form is an editable PDF file with the state name in the header.

The employee can find their W-4:

- **Pay and Tax Withholding** under **Me**.
- **Personal Information** in **My Details**

When the employer or employee makes a change that causes an automatic update of the Tax Withholding card, one of two things happens.

- If the change is made in a state where the state form copies the federal, it copies the filing status from federal to state withholding.
- If the employee is transferring to a state that uses a separate withholding form, the employer must provide new address information. From **My Client Groups**, click **Payroll**. Start the Calculation Cards task. Search for the person, and open their Tax Withholding card for editing. Click **Regional**, and from there, they can get the new address information to create state, county, and city components.

*Related Topics*

- [How do I update my W-4](#)
- [Configure the Tax Withholding Card](#)
- [Examples of Updating the Tax Withholding Card After a Location Change](#)
- [Tax Withholding Card](#)



## 3 United Kingdom

### View and Update Pay Information for the UK

Use the pages in the Pay work area to view and update your pay information.

These are the pages you can access from the Pay work area:

- Document Delivery Preferences
- Payslips
- Payment Methods
- Year-End Documents
- New Starter Declaration

#### Document Delivery Preferences

Use the Document Delivery Preferences access and edit your document delivery preferences.

From the list of document types, select a document type to set its preferences. You can set your preferences for these document types:

- P60: You can select Online, Paper, or Online and Paper
- Pension Automatic Enrolment: Online
- Payslip: You can select Online, Paper, or Online and Paper

#### Payslips

Use this to view details of your payslips for the last 3 months, last 12 months or a specific date range. You can also view the hours related to your earnings, if it's set up by your employer.

#### Payment Methods

Use this to access and edit your payment method details.

#### Year-End Documents

View and print year-end documents for a set of years or for a specific date range for these documents, provided your employer has granted online access::

- Benefits-in Kind or P11D statement
- P60 for each assignment

#### New Starter Declaration

Complete the new starter declaration form and submit this information to your employer. This declaration includes options for both student loans and postgraduate loans as required by HMRC.

## How can I update and submit the new starter declaration?

Go to the Home page and click Pay. Click New Starter Declaration. Use the Edit option to update your employee statement and submit this information. Once you submit your new starter declaration, you can only view it, but can't modify it.

# 4 Canada

## View and Update Pay Information for Canada

Use the pages on your Payroll page to view and update your pay information. Your Payroll page contains the following pages:

- Document Delivery Preferences
- Payslips
- Payment Methods
- Tax Credit Information
- Year-End Documents

Click any of these options to open the page and view the related information. For example, click Payslips to view the details of your previous payslips. You can view the payslip, save the PDF, or print your payslip as required.

## How Do I View My Online End-of-Year Slips

You can access and view your year-end documents online by using either of these navigation:

- Use either **Quick Actions** or **Pay**, both of which are located on the employee dashboard under the **Me** tab. To access the Year-End Documents in employee self-service using **Pay**:
  - On the Home page, click **Me > Apps > Pay > Year-End Documents**

**Note:** If the Pay action isn't available in the initial Quick Action list, click **Show More** to access all the available actions.
- Use the Document Records in employee self-service. On the Home page, click **Me > Personal Information > My Documents**.

Using either method, you can access your T4, T4A, RL-1, and RL-2 slips for the original, amended and canceled form types.

Also, you can use the default search of the last 3 years, or enter a specific date range.

## Document Delivery Preference

By default, the preferences for document records and attachments are restricted, and employees aren't allowed to add, update, or delete completed year-end documents and attachments. This will disable updates and removals of the slips after they're created and posted. This applies to all year-end document types, as well as original, canceled, and amended slips.

However, you can set your print preferences for the year-end slips, using the employee dashboard.

**Note:** In order for you to set your print preferences, you should have the following privileges:

- Your company has enabled Employee Self-Service.
- Your company allows its employees to set print preferences of their year-end documents.

1. On the Home page, click **Me**.
2. On the **Me** page, select **Pay**.
3. Select **Document Delivery Preference**.
4. For the appropriate form, click **Edit** and make the necessary changes.
5. Set the **Document Type Delivery Method** as **Online**.

**Note:** The default is Paper.

6. Click **Save**.

To receive digital versions of your slips, you must provide explicit consent using Document Delivery Preferences. The publish day and month determines the date the documents are published to Document Records.

## How Do I Update My Tax Credit Information

The default employee tax card is generated automatically if a tax reporting unit is selected at the time of new hire. The information on this card is reported on your year-end federal and provincial forms.

Your tax card provides this information the payroll process needs to process your taxes:

- Federal and Provincial Deductions
- Tax Exemption Information
- Commission Information

Use the Tax Credit Information page to view your tax credit information and perform these actions:

- Update your tax credit information on the current forms
- Add new forms
- Add future-dated forms
- View prior forms
- Delete forms
- Download and save the populated federal and provincial personal tax credit return PDFs

## Access the Tax Credit Information Page

Use either of these navigation to access the Tax Credit Information page:

- On the Home page, click **Me > Quick Actions > Pay > Tax Credit Information**.

If you don't see Pay in the initial list click **Show More** to access more links.

- On the Home page, click **Me > Apps > Pay > Tax Credit Information**.

The landing page displays the forms in the following order:

1. Federal forms
2. Provincial forms, in alphabetic order
3. Future-dated forms, if any, in lighter font

The landing page shows the first six fields by default. If there are more than six fields, click the down arrow to show the remaining fields.

## Update Tax Credit Information

You can access the current forms and make edits to your personal tax credit information, if required. Click the **Edit** button to open the form in edit mode and make updates.

Back-dated changes aren't allowed.

For more information on the tax credit information, refer 'Enterable Values on the Personal Calculation Card' topic on the Help Center.

## Add New Forms

You can also add new forms and make future-dated changes. Use the **Add** button to open a new form and select the date and province to add. The province selected here has no impact on the Province of Employment on the calculation card.

Future-dated forms are displayed on the landing page after the current forms. Once a future-dated form is entered, the current form is end-dated one day prior to the start of the future form. You can delete future-dated forms. To delete a future-dated form, enter the form in the edit mode and use the **Delete** button.

When making changes, the **I Agree** statement is mandatory. An error message is displayed if you try to save the changes without selecting the **I Agree** check box.

## Download Federal and Provincial Forms

Click on the name of the federal or provincial name link to generate the form in the PDF format. You can then download and save the PDF or print it.



# 5 China

## View and Update Pay Information for China

Use the pages in the Pay work area to view and update your pay information.

These are the pages you can access from the Pay work area:

- Document Delivery Preferences
- Payslips
- Payment Methods
- Social Security Accounts

### Document Delivery Preferences

Use the Document Delivery Preferences to access and edit your document delivery preferences.

To open the Document Delivery Preferences page, from the Pay work area, select **Document Delivery Preferences**.

On the Document Delivery Preferences page, from the list of document types, select a document type to set its preferences. Only those document types are listed that you're configured to view. For example, for payslip, you can select **Online**, **Paper**, or **Online and Paper**.

### Payslips

Use this to view details of your payslips for the last 3 months, last 12 months, or a specific date range.

### Payment Methods

Use this to access and edit your payment method details.

### Social Security Accounts

Use this to view your social security accounts.

## How Do I Add Payment Methods for China

This topic demonstrates how you can add payment methods.

### How to Add Payment Methods

China supports only the payments types of cash and direct deposit.

Let's look at the steps to add a payment method:

1. On your home page, click the **Me** tab, and then click **Pay**.
2. On the Payroll page, click **Payment Methods**.
3. On the My Payment Methods page, in the My Payment Methods section, click **Add** and complete these fields:
  - In the **What do you want to call this payment method?** field, enter the name for the payment method.
  - In the **Account Number** field, enter the account number.
  - In the **Account Holder** field, enter the name of the account holder as mentioned in the bank account details.
  - From the **Bank** list, select a bank.
  - From the **Bank Branch** list, select a branch of the bank.
  - From the **Payment Type** list, select one of these options:
    - Direct Deposit: Select this option if you want to receive your pay directly into your bank account.
    - Cash: Select this option if you want to receive your pay in cash.
4. Click **Save**.

## How Do I View Social Security Accounts

This topic demonstrates how you can view social security accounts.

### How to View Social Security Accounts

China supports these social security accounts:

- Basic Pension Insurance
- Basic Medical Insurance
- Supplementary Medical Insurance
- Unemployment Insurance
- Maternity Insurance
- Work-Related Injury Insurance
- Public Housing Fund
- Supplementary Public Housing Fund
- Enterprise Annuity

**Note:** You can view only those social security accounts for which a corresponding calculation component has been added in your personal calculation card.

Let's look at the steps to view the social security accounts:

1. On your home page, click the **Me** tab, and then click **Pay**.



2. On the Payroll page, click **Social Security Accounts**.
3. On the Social Security Accounts page, in the **View Accounts As-of Date** field, specify a date for which you want to view your social security accounts.

The information about your social security accounts is displayed in the Employee Accounts and Employer Accounts sections.

